

RMA Returns for Magento 2 User Guide

Introduction

RMA Returns for Magento 2 is an extension that installs an easy and convenient return system on your store. With our extension your clients can create a return request quick and easy right from their user accounts.

RMA Returns also makes it easier for the admin to track all the requests and deal with them swiftly. Wide variety of options makes it convenient for both clients and admins. Merchants can adjust email notifications, set various return options, etc. In their turn, clients also have various alternatives for a return. With this extension the whole process of refund is fast and easy.

Installation

1. Unpack the zip file provided into the root folder of your Magento 2 installation.
2. From a command line run:

```
bin/magento module:enable Neklo_Core  
bin/magento module:enable Neklo_Rma  
bin/magento setup:upgrade  
bin/magento setup:static-content:deploy
```

Magento compatibility

Community Edition 2.1.x, 2.2.x
Enterprise Edition 2.1.x, 2.2.x

Configuration

To enable this extension, go to **Stores** → **Settings** → **Configuration** → **Neklo** → **Return Merchandise Authorization**. There are also other features you can adjust:

1. **Is Enabled** turns the extension on and off.
2. **Return Number format** means the appearance of a return number and how many digits are shown there.

The screenshot shows the 'Configuration' page in the Neklo system. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and includes a search icon, a notification bell, and a user profile 'admin'. Below this is a 'Store View' dropdown set to 'Default Config' and a 'Save Config' button. The 'NEKLO' section is expanded, showing 'Return Merchandise Authorization' settings. Under 'General Settings', 'Is Enabled' is set to 'Yes' and 'Return number format' is set to '1%'.09d'. Below this are expandable sections for 'Contact Settings', 'Email Settings', 'Return Reasons Settings', and 'Package Conditions Settings'.

Notification and Reply Emails Settings

Also here (**Stores** → **Settings** → **Configuration** → **Neklo** → **Return Merchandise Authorization**) you should manage the emailing process with the Contact Settings and Email Settings tabs:

1. **Email Sender** defines who sends the emails
2. **Email Recipients** for Admin Reply - here you can set the recipients, who will get notifications about the new created requests.

Configuration

Save Config

- DASHBOARD
- SALES
- CATALOG
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM
- FIND PARTNERS & EXTENSIONS

GENERAL ▼

General Settings ⌵

NEKLO ▲

Contact Settings ⌵

Security Suite

Email Sender [store view]

Return Merchandise Authorization

Email Settings ⌵

Extensions & Contact

Created Return Request Template [store view] ▼
Template for notify customer about created return request

CATALOG ▼

Admin Notify About Created Return Request Template [store view] ▼
Template for notify admin about created return request

CUSTOMERS ▼

Reply email to customer [store view] ▼
Email template used for message to customer.

SALES ▼

Reply email from customer [store view] ▼
Email template used for message from customer.

DOTMAILER ▼

Email Recipients for Admin Reply [global]

SERVICES ▼

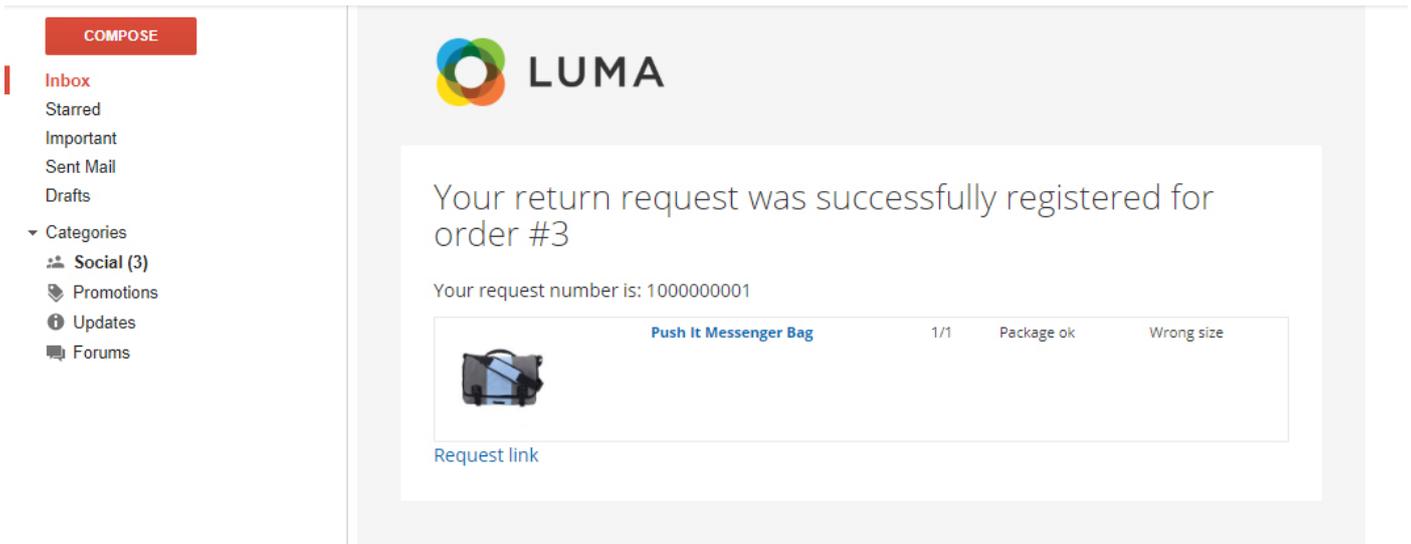
Email	Action

ADVANCED ▼

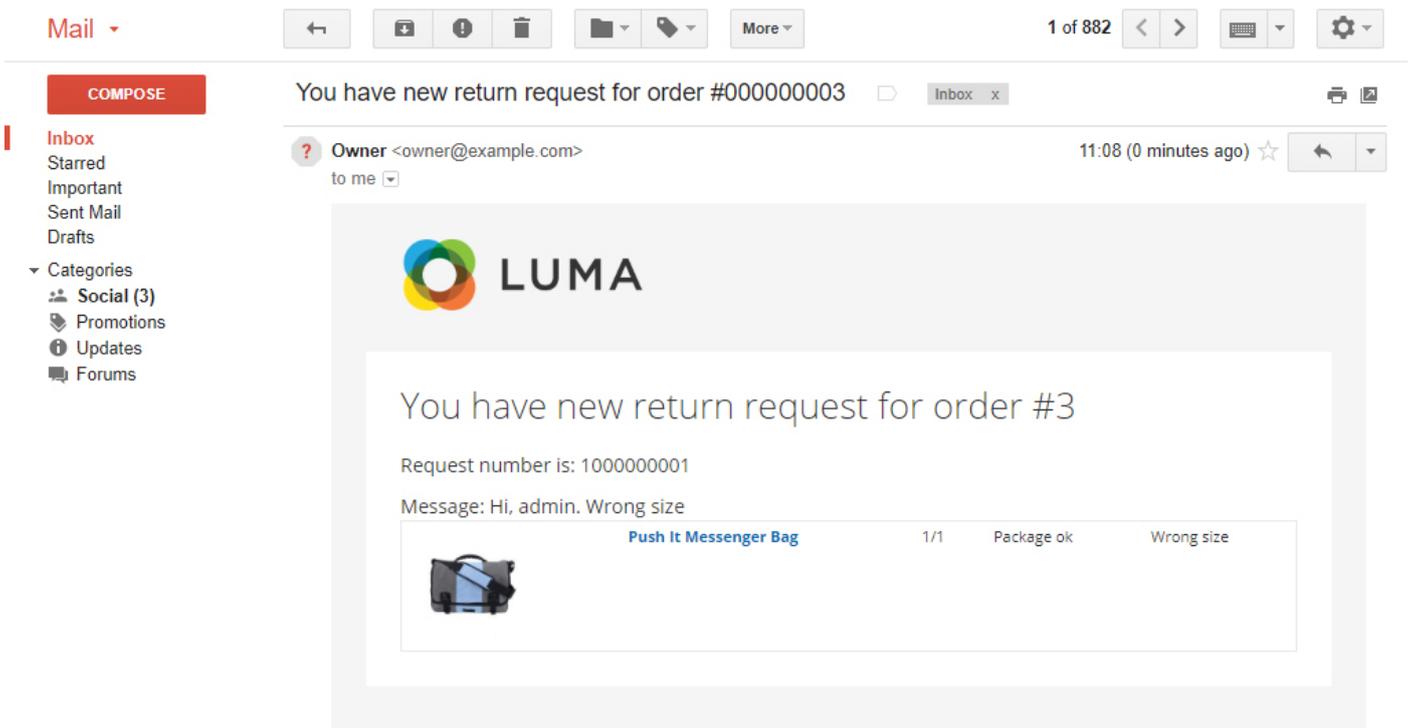
Set the Email Templates

Here are the email templates you can set:

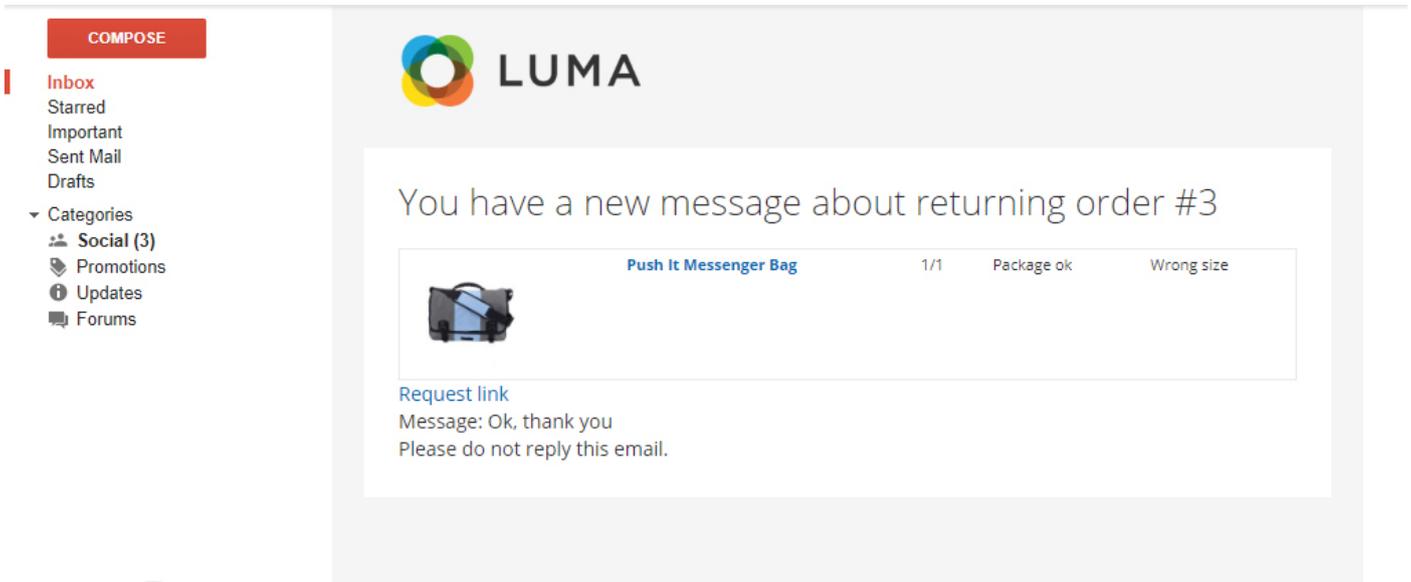
3. In **Created Return Request Template** drop-down list, you can select the email template that is sent to the customer after he created the return request.



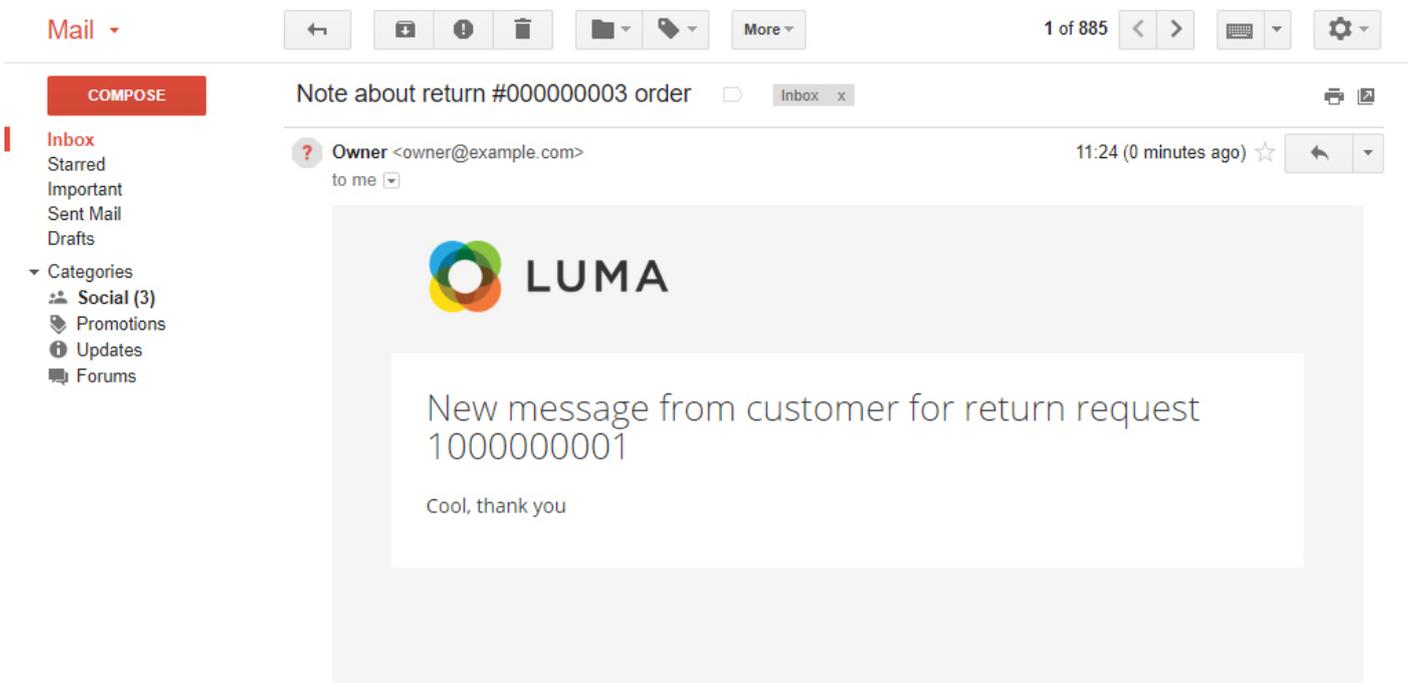
4. In **Admin Notify About Created Return Request Template** drop-down list, you can set the template for the email that about a created refund request and it is sent to the admins.



- In **Reply email to customer** drop-down list, you can choose the email template used for replies to the customer upon the requests.



- In **Reply email from customer** drop-down list, you can pick the template used for email replies from the customer to the admin upon the requests.



Define the Reasons of Returns

On the tab **Return Reasons Settings** (Here: **Stores** → **Settings** → **Configuration** → **Neklo** → **Return Merchandise Authorization**) you can add new return reasons or edit the existing ones:

1. Click **Add new items** to add a new reason
2. **Label** is the name customers will see
3. **Code** is the ID that is assigned to this reason
4. You may show or hide a reason for customers by the **Enabled** tick mark
5. You can delete any reason by clicking the **cross** on the right side

You can also drag & drop these lines for more convenient use.

The screenshot shows the 'Configuration' page for 'NEKLO'. The left sidebar contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and includes a 'Save Config' button. The 'Return Merchandise Authorization' section is active, displaying a table of return reasons. The table has columns for 'Add new item', 'Label', 'Code', and 'Enabled'. Three items are listed: 'Wrong size' (code: wrong_size), 'It's broken' (code: not_working), and 'broken test' (code: test notworking). Each item has a checked 'Enabled' box and a delete icon (cross). Below the table, there is a note: 'Setup reasons for customer to complain about.'

Add new item	Label	Code	Enabled
	Wrong size	wrong_size	<input checked="" type="checkbox"/>
	It's broken	not_working	<input checked="" type="checkbox"/>
	broken test	test notworking	<input checked="" type="checkbox"/>

Setup reasons for customer to complain about.

Indicate the Package Condition

The **Package Condition Settings** tab (Here: **Stores** → **Settings** → **Configuration** → **Neklo** → **Return Merchandise Authorization**) allows you to set the possible conditions of the shipped package:

1. Click **Add new items** to add a new package condition
2. **Label** is the name customers will see
3. **Code** is the identification sign that is assigned to this condition
4. You may show or hide a condition for customers by the **Enabled** tick mark
5. You can delete any condition by clicking the **cross** on the right side

You can also drag & drop these lines for more convenient use.

The screenshot shows the 'Configuration' page for 'NEKLO'. The left sidebar contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and includes a 'Save Config' button. The 'Return Merchandise Authorization' section is active, displaying 'Package Conditions Settings'. Below this, there is a table with columns for 'Add new item', 'Label', 'Code', and 'Enabled'. The table lists five conditions: 'Package ok', 'Package teared', 'Package squashed', 'Package missing', and 'Package test'. Each row has a 'Label' input field, a 'Code' input field, an 'Enabled' checkbox, and a delete icon (cross). Below the table, a note states 'State of package that arrived.'

Add new item	Label	Code	Enabled
	Package ok	ok	<input checked="" type="checkbox"/>
	Package teared	teared	<input checked="" type="checkbox"/>
	Package squashed	squashed	<input checked="" type="checkbox"/>
	Package missing	missing	<input checked="" type="checkbox"/>
	Package test	missing test	<input checked="" type="checkbox"/>

State of package that arrived.

Managing the Requests

All the requests are contained here: **Sales** → **RMA System** → **Requests**. There you will see the table with all requests:

1. **Request number** is the counting number of the request
2. **Order number** is the exact number of this order. Its form may be chosen in the field Return Number format described above.
3. **Customer** is the name of your client
4. **Product** is the full name of the item
5. **Status** is the current request status. It may be set and views only by admins, no client will see it.
6. **Created** and **Updated** regulate the dates of creation and last update of the request
7. **Action** is the list of actions you can apply to the request.


DASHBOARD


SALES


CATALOG


CUSTOMERS


MARKETING


CONTENT


REPORTS


STORES

Requests

Search by keyword

 Filters

 Default View

 Columns

1 records found

20

per page

<

1

of 1

>

Request # ↑	Order #	Customer	Products	Status	Created	Updated	Action
1	000000003	Test Neko	Push It Messenger Bag (Wrong size)	Pending Approval	Jun 26, 2018 3:08:05 AM	Jun 26, 2018 3:08:05 AM	Select ▾

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Magento ver. 2.2.4
[Account Activity](#) | [Report an Issue](#)

To see full information about the request, click on in or select **Edit** in the **Action** column. You can set the **Status** of the request and write a **Direct Message** to the customer. You will also see here the full history of messages and returns of this client. You can also **Delete** the resolved request by choosing the corresponding line in the **Actions** list.























Edit Request 1000000001

← Back to register or connect an account
Reset
Save and Continue Edit
Save Request

General Information

Order # 000000003

Status * Pending Approval

Products to return

Product	Price	Return Qty	Reason	Package
Push It Messenger Bag	45.0000	1	Wrong size	Package ok

Notes

Sent	Message
<i>Jun 26, 2018, 3:08:05 AM</i> [sent by: Customer]	Hi, admin. Wrong size

Add message

This message will be sent to customer on saving return request. Left this field blank if email notification is not needed.

History

Created	From	To
<i>Jun 26, 2018, 3:08:05 AM</i>	Created	Pending Approval

Set the Statuses

To add new Status or edit the existing one, go to **Sales** → **RMA System** → **Statuses**. There is a table with all the statuses and the following information:

1. The **Add New Status** button gives you a possibility to add a new status
2. **ID** is the personal counting number of a Status
3. **Code** is the identification sign that is assigned to this status
4. **Label** is the name customers will see
5. **Action** is the list of actions you can apply to the status. You can **Delete** or **Set as Default**.

Request statuses

Search by keyword

Actions 3 records found per page of 1

<input type="checkbox"/>	ID	Code	Label	Action
<input type="checkbox"/>	1	pending	Pending Approval	Select <input type="button" value="v"/>
<input type="checkbox"/>	2	approved	Approved	Select <input type="button" value="v"/>
<input type="checkbox"/>	3	canceled	Canceled	Select <input type="button" value="v"/>

You can also edit statuses by clicking on any of them or selecting Edit in the Action column. You will be able to set the Code and the Label of the chosen status. Don't forget to Save your changes.

Edit Status 1

Status Information

Status code *

Status Label *

The way how the user will see it.

- Account Dashboard
- My Orders
- My Downloadable Products
- My Wish List

- Address Book
- Account Information
- Stored Payment Methods
- Billing Agreements

- My Product Reviews
- Newsletter Subscriptions
- Product Returns

Return # 10000000001

View Return Request

Order #
#000000003

Ordered
Jun 26, 2018, 2:28:23 AM

Order Status
Complete

Order Total
\$50.00

Request Status
Pending Approval

Products to return

Product	Amount to return	Package condition	Reason
Push It Messenger Bag	1	Package ok	Wrong size

Notes

<i>Jun 26, 2018, 3:24:10 AM</i> [sent by: You]	Cool, thank you
<i>Jun 26, 2018, 3:20:46 AM</i> [sent by: Store]	Ok, thank you
<i>Jun 26, 2018, 3:08:05 AM</i> [sent by: You]	Hi, admin. Wrong size

Note to merchant

Confirm

Back to register or connect an account

Thank you for using this extension. You will find more our great solutions for Magento here:

store.neklo.com