PurpleTree Software

Product Return RMA with SMS

Installation Instructions

Installation by composer

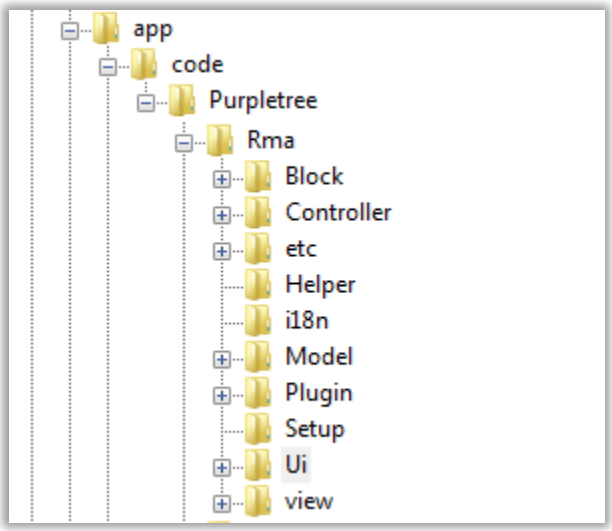
- Update Magento's composer.json
- If you haven't done so already, change to your environment root directory.

  Enter the following commands to update it:

- composer require purpletree/rma:1.0.0 --no-update
- composer update
- Wait for project dependencies to update

Installation from Downloaded Zip File

- Unpack .zip file inside **app/code/Purpletree/Rma/** directory.



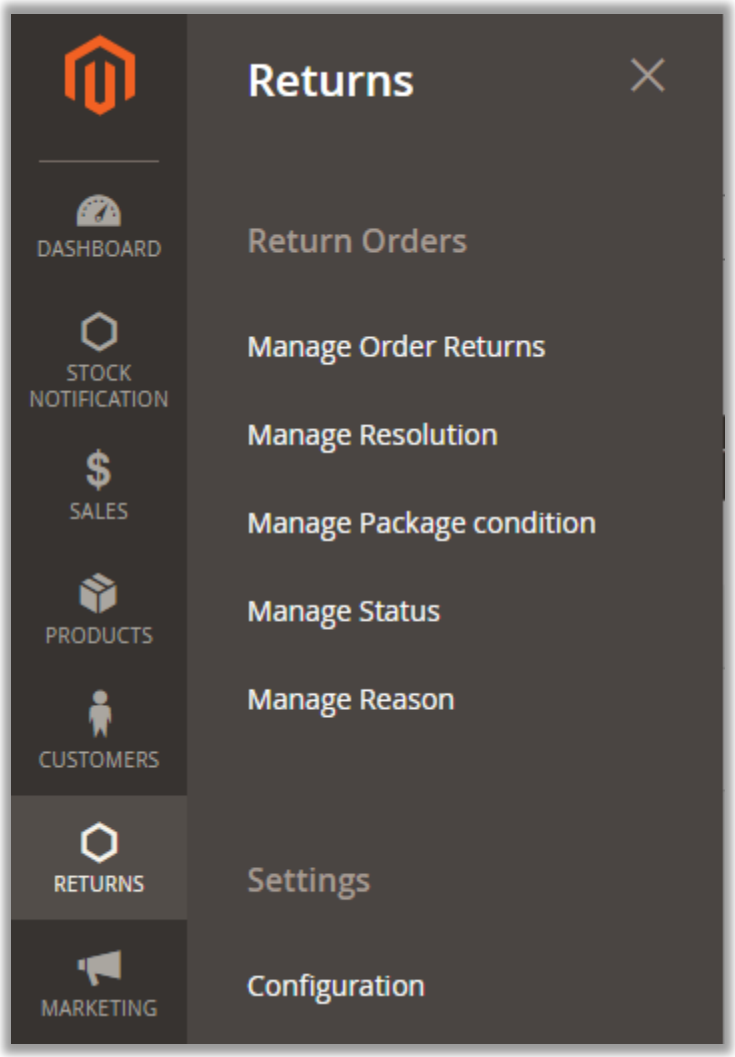
From shell/command prompt, run following commands from Magento root directory:

php bin/magento setup:upgrade

On successful installation, a new Menu and submenu will appear in magento admin panel with name of **RETURNS.** It will have following sub menus

Returns

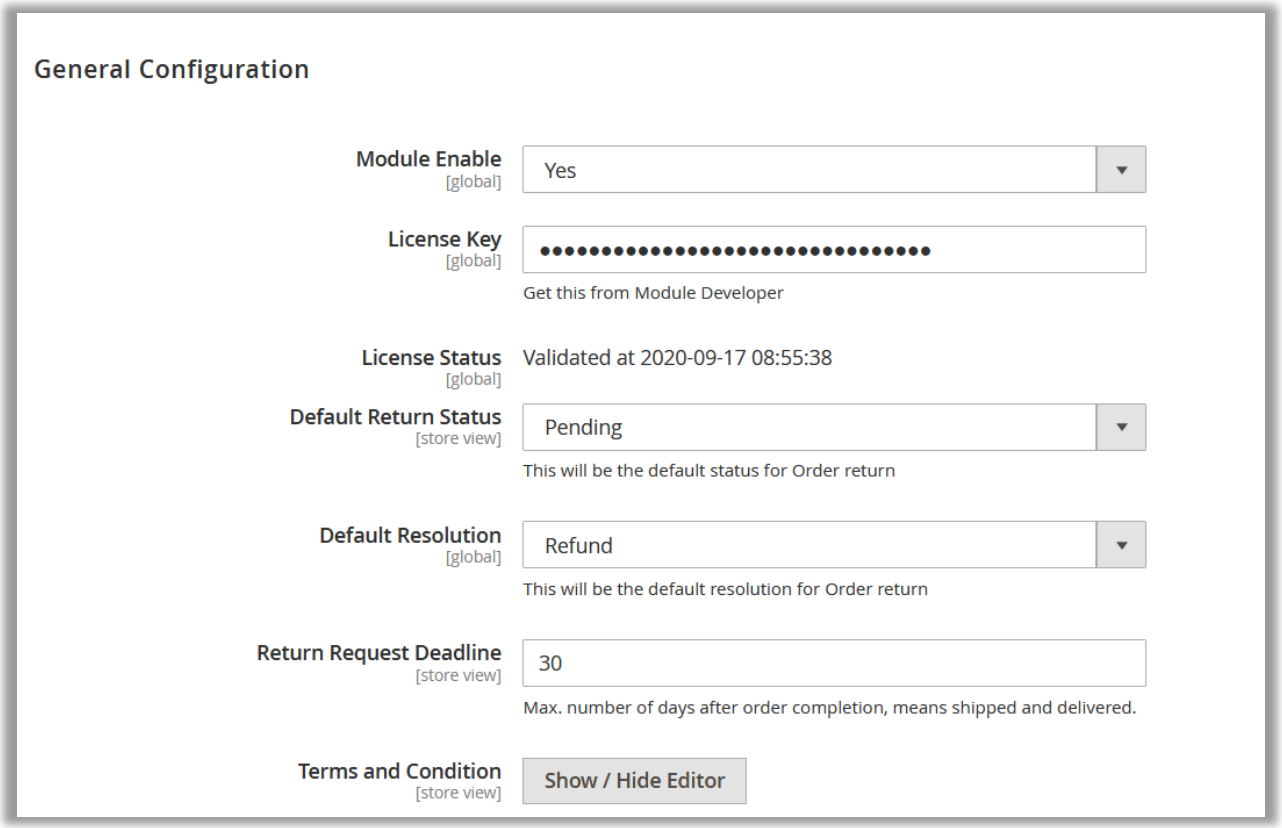
- Return Orders
    - Manage Order Returns
    - Manage Resolution
    - Manage Package Condition
    - Manage Status
    - Manage Reason
- Settings
    - Configuration



To Configure and Enable the Extension

- Go to Return>Settings >Configuration.
- In “General Configuration”, Set “Module Enable” to Yes.
- Now Enter License key you get with this extension in License key field. (required field)
  If you haven’t received license key, please contact our support team.
- License Status – Default it is set “To be Validated”. It will get validated once you enter Valid License key.
- Default Return Status – Select default status from dropdown to be set for any return request placed by customer.
- Default Resolution – Select default resolution from dropdown to be set for any return request placed by customer.
- Return Request deadline – Enter number of days for which customer can request return. These days will be counted from the date of last status changed by admin for the order or order shipped date..
- Terms and Conditions – These are the terms of return. Customer must accept these terms to return order.

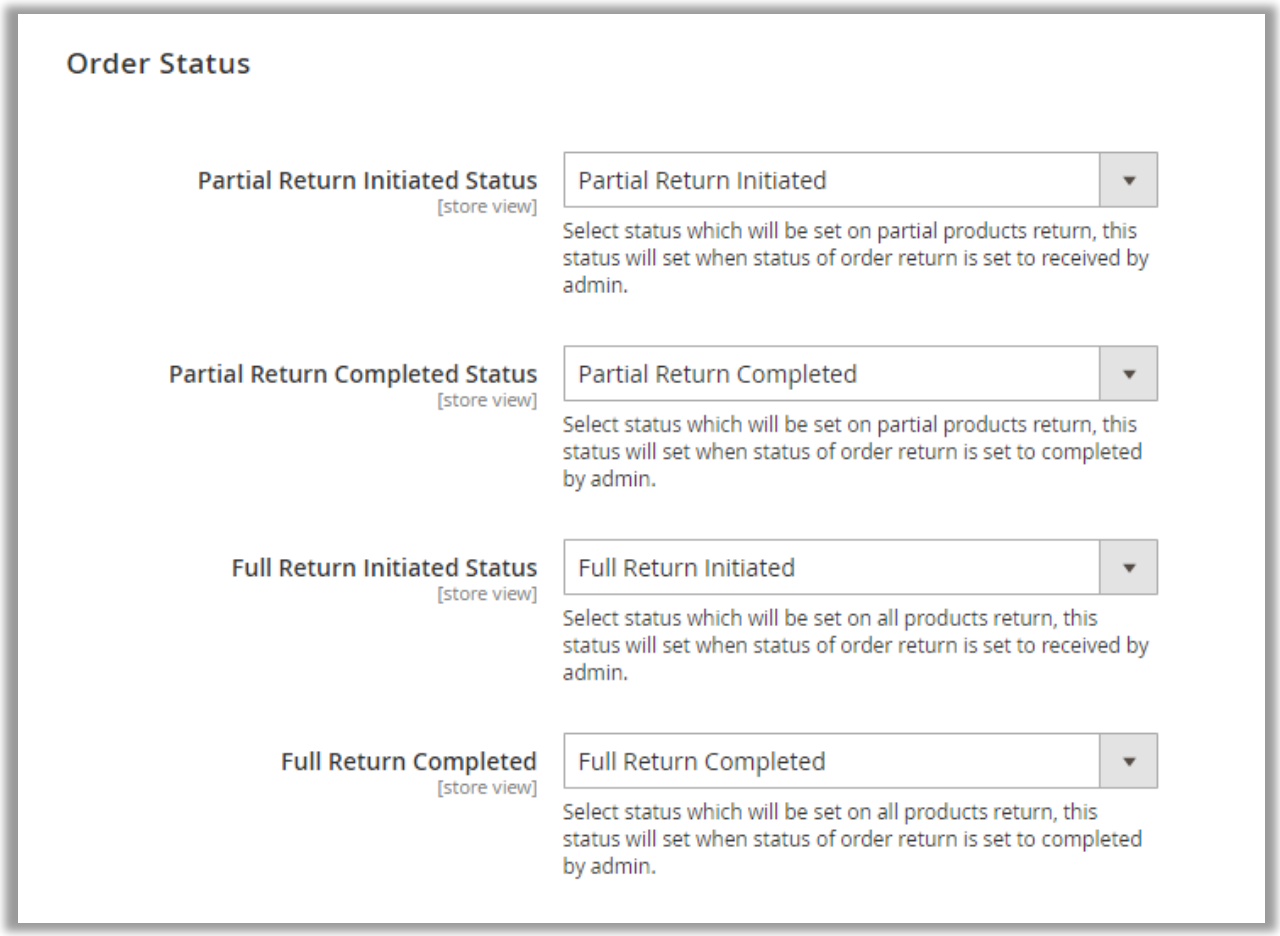
Note: Valid License Key is required to save any configuration changes. Please purchase the extension to get a valid License key.



Note: After changing options make sure you refresh your Magento cache.

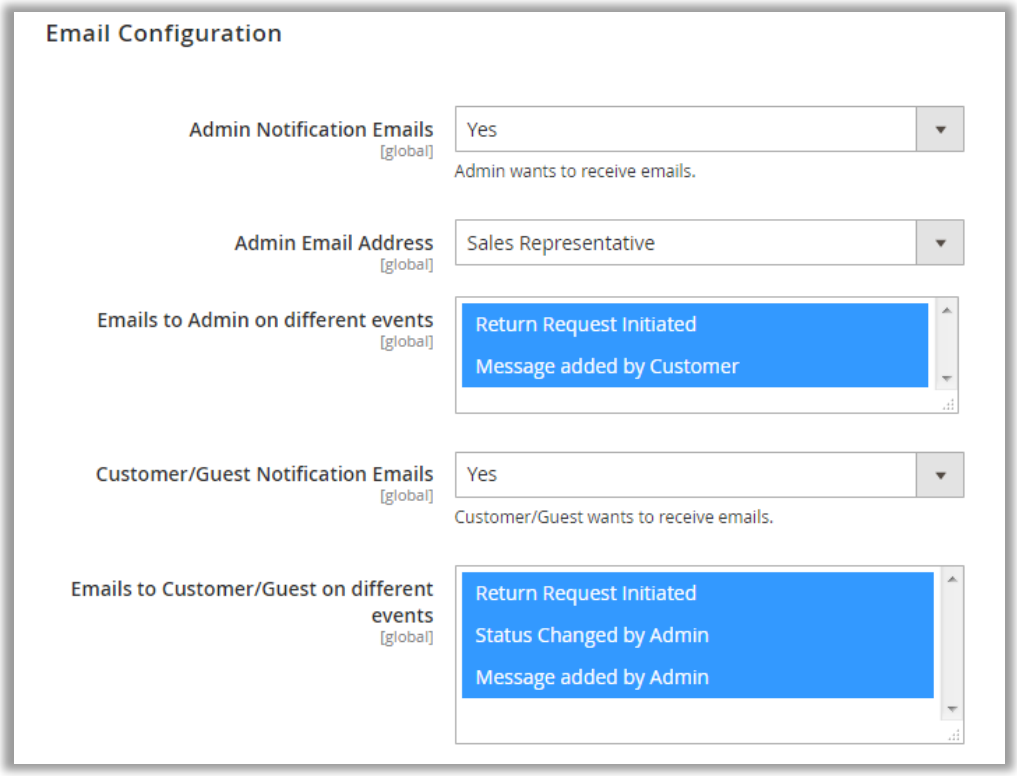
Order Status

- Partial Return Initiated Status– This status will be assigned to order when partial products from the order are requested to return. When admin changed the return request status to "Received", this status will be set main order.
- Partial Return Completed Status–This status will be assigned to order when partial products from the order are requested to return. When admin changed the return request status to "Completed", this status will be set to main order.
- Full Return Initiated Status–This status will be assigned to order when all products for the order are requested to return. When admin changed the return request status to "Received", this status will be set to main order.
- Full Return Completed–This status will be assigned to order when partial products from the order are requested to return. When admin changed the return request status to "Completed", this status will be set to main order.



Email Configuration:

- Admin Notification Emails – Set it to "Yes" to send emails to admin for different events.
- Admin Email Address –Select Email to which admin wants to receive return request emails.
- Emails to Admin on different events – Select events to send email to Admin.
- Customer/Guest Notification Email -Set it to "Yes" to send emails to customer/Guest for different events.
- Emails to Customer/Guest on different events- Select events to send email to customer/guest.



SMS Configuration:

- SMS Enable – Set it to "Yes" to send SMS to customer for different events.
- SMS API URL –Enter SMS API provided by sms provider.
- SMS on Order Return Initiate –Set it to "Yes" to send SMS to customer whenever customer initiates a request to return an order.
- Order Return Initiate Template-Enter sms message which customer will receive for order return initiate.

  Use variables - _NAME_(for Customer name),_ORDERID_(for Order id),_URL_ (for store url).

  Default message is - Hello _NAME_, Your request for order no. _ORDERID_ has been received. Track your request at _URL_

- SMS on Status Change- Set it to "Yes" to send SMS to customer whenever admin change the request status for return.
- Status Change Template-Enter sms message which customer will receive when admin change status of return.

Use _NAME_(for Customer name),_ORDERID_(for Order id),_STATUS_(for Status), _URL_ (for store url).

Default message is - Hello _NAME_, Your request for order no. _ORDERID_ is _STATUS_. Track your request at _URL_

- SMS on Message added by admin- Set it to “Yes” to send SMS to customer whenever admin add some message to return request.
- Comment Template-Enter sms message which customer will receive when admin change status of return .

  Use variables NAME_(for Customer name),_ORDERID_(for Order id),_URL_ (for store url).

  Default message is - Hello _NAME_, Your request for order no. _ORDERID_ has received message from admin. Track your request at _URL_

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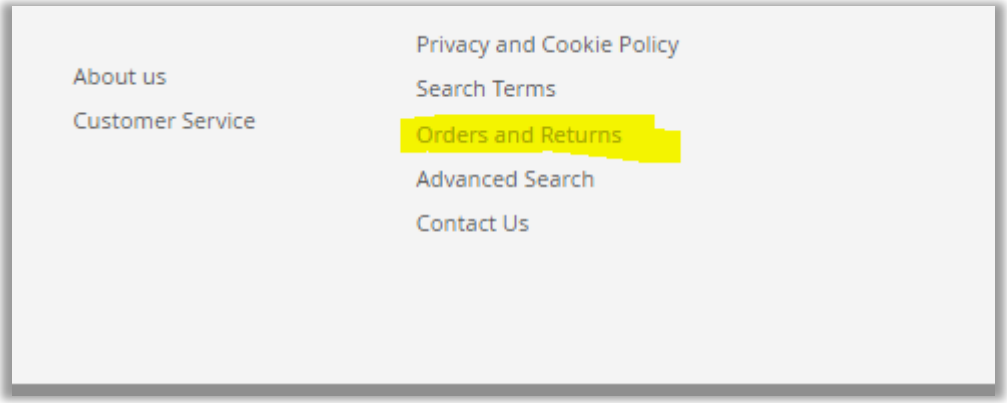
SMS Configuration

SMS Enable [global]	Yes
SMS API URL [store view]	http://t.google.com/sendsms.jsp?user=xxx&password=qtrian12&mob Please enter the SMS API provided by sms provider,Note use these variable:-_MOB_(for mobile number), and _TEXT_(for SMS).
SMS on Order Return Initiate [global]	Yes
Order Return Initiate Template [store view]	Hello _NAME_, Your request for order no. _ORDERID_ has been received. Track your request at _URL_ Note use these variable:-_NAME_(for Customer name),_ORDERID_(for Order id),_URL_ (for store url).
SMS on Status Change [global]	Yes
Status Change Template [store view]	Hello _NAME_, Your request for order no. _ORDERID_ is _STATUS_. Track your request at _URL_ Note use these variable:-_NAME_(for Customer name),_ORDERID_(for Order id),_STATUS_(for Status), _URL_ (for store url).
SMS on Message added by admin [global]	Yes
Comment Template [store view]	Hello _NAME_, Your request for order no. _ORDERID_ has recieved message from admin. Track your request at _URL_ Note use these variable:-_NAME_(for Customer name),_ORDERID_(for Order id),_URL_ (for store url).

Guest Side

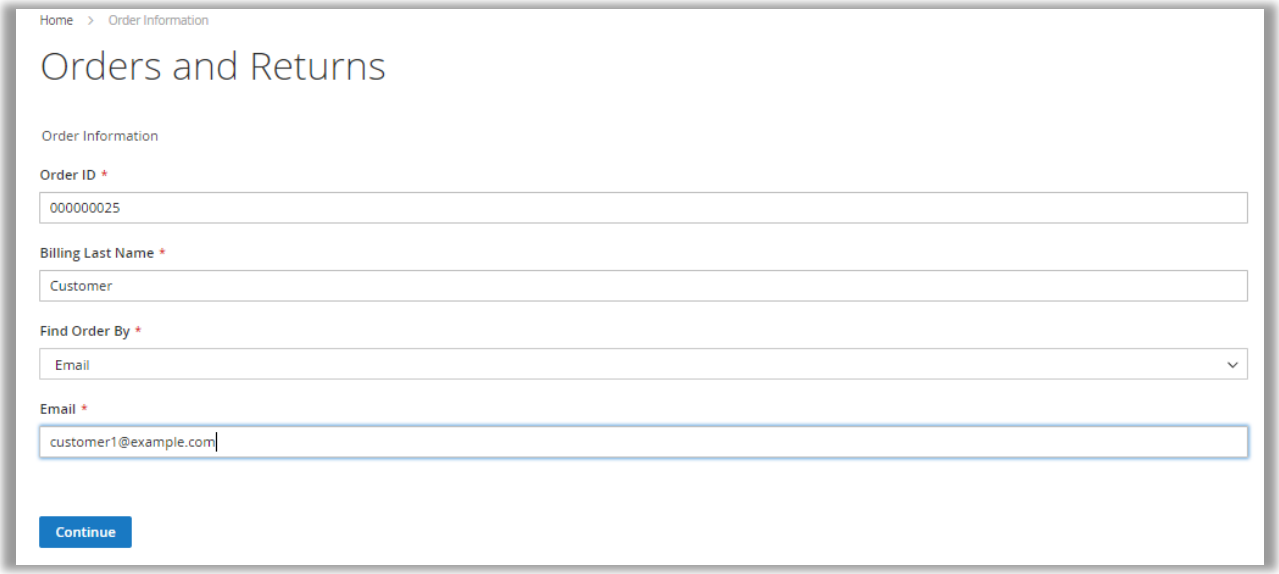
Orders and Return

For Guest users or Not logged in Customers, they can return there order from the order view page which is already provided by magneto. The link is available on footer on default LUMA theme.

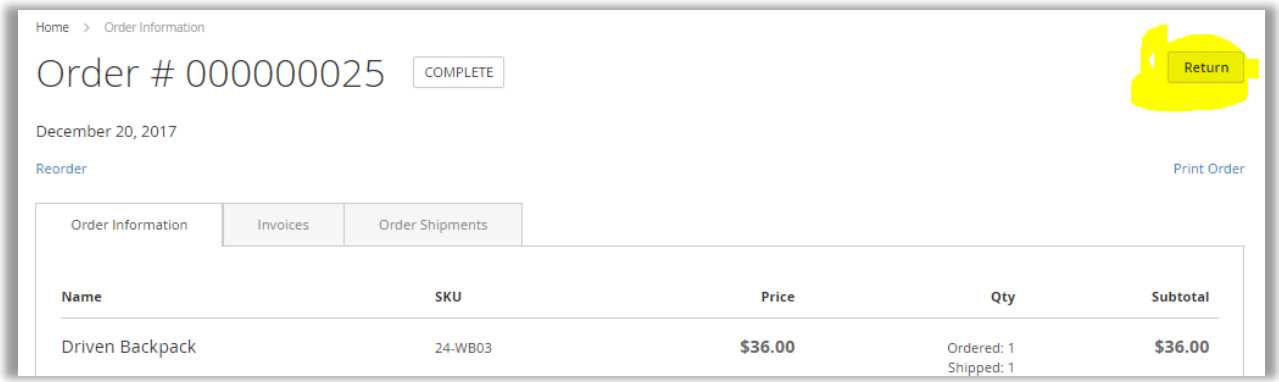


Default url of Orders and return page provided by magento is - http://example.com/sales/guest/form/

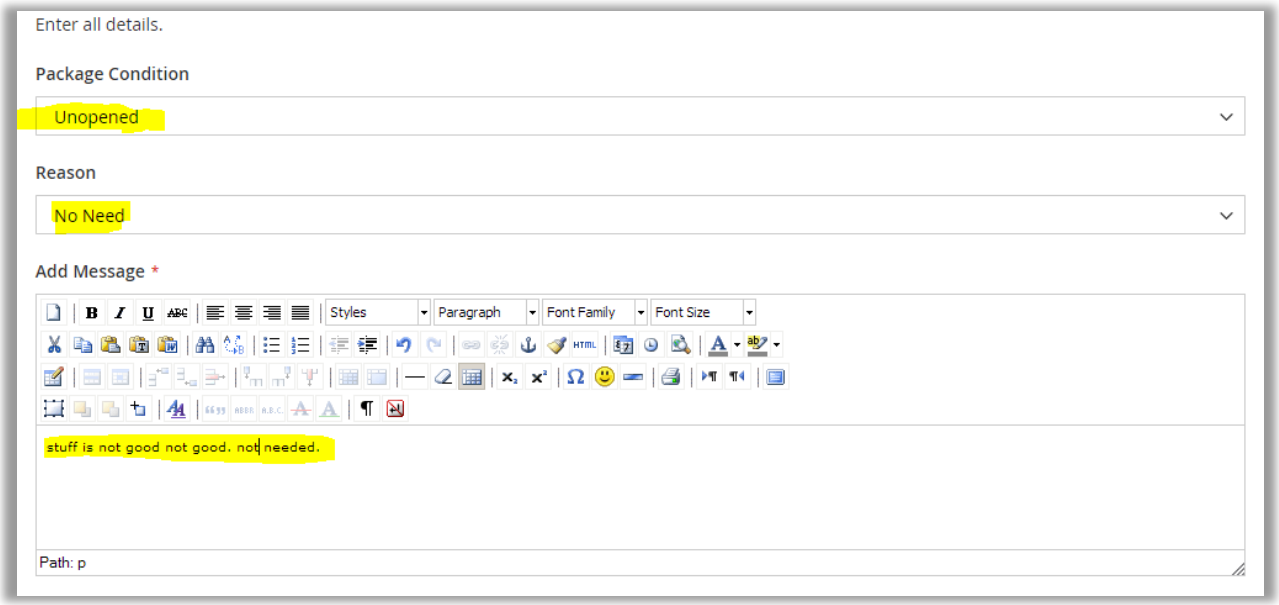
- Enter the order details in form and continue.



- Guest/Not logged in customer can view order details. If RMA extension is enabled, order state is complete and return request deadline days are not over as defined in configuration. **Returns** button will appear along side with order status.



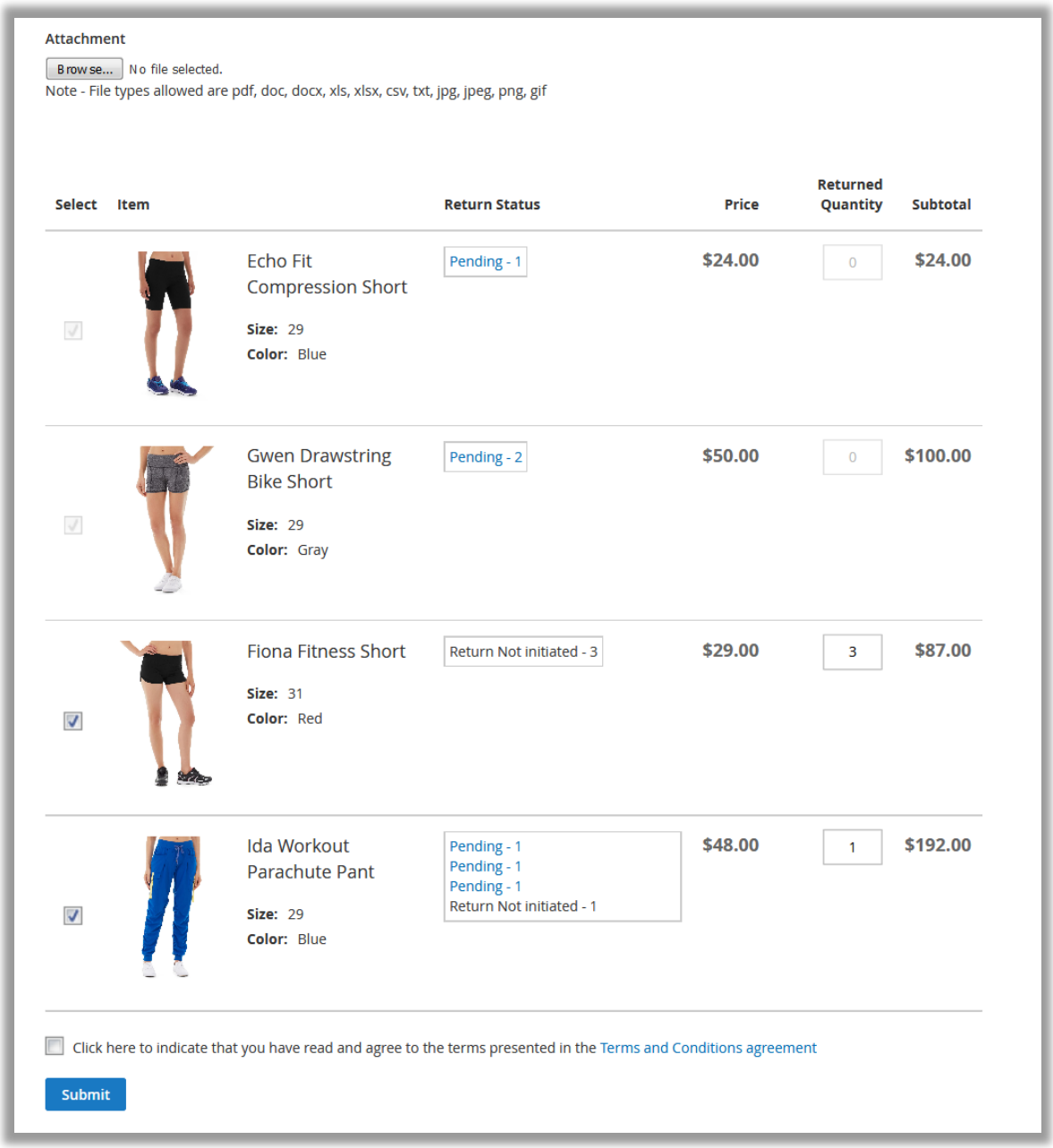
- Enter all details in form. Select Package condition, Reason to return and add message in editor.



- Customer can also add any attachment for reference. File types allowed are pdf, doc, docx, xls, xlsx, csv, txt, jpg, jpeg, png, gif only.
- Select products from the list and quantity needs to be returned. Customer can return single product or all products.
- There is Column **Return Status**, it will show if Return request which are already raised for the product, if so, click on that request link to view the request.
- You can Select Quantity which needs to be returned for any particular product, if 1 product Quantity is returned in 1 request and other in another request then there would

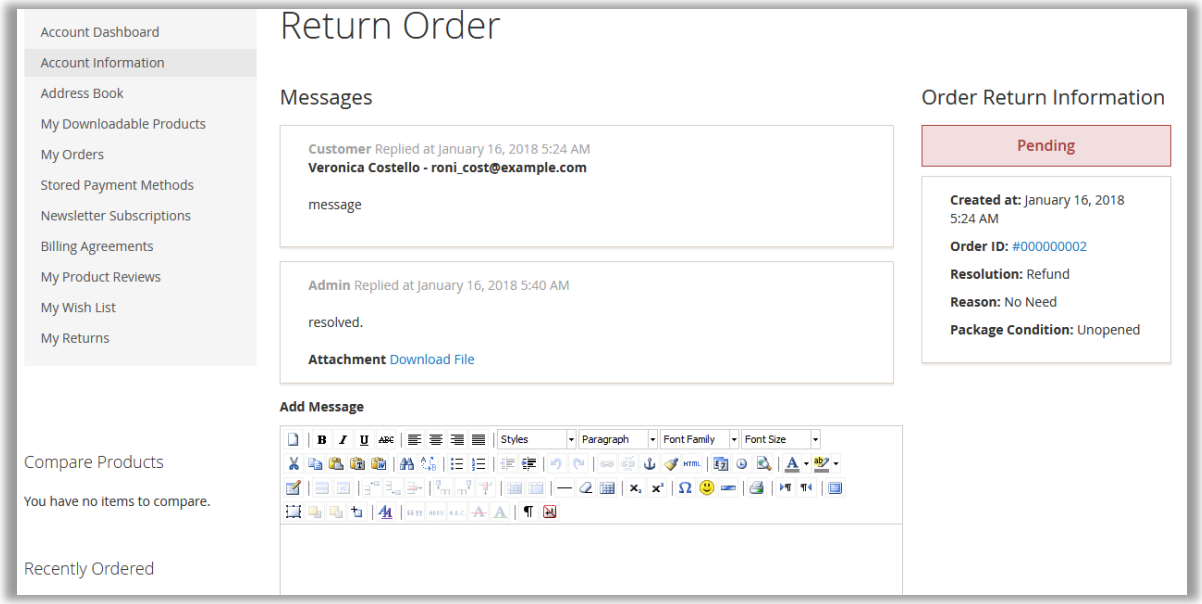
be all request links with current Status of the request, you can click on each request to view the details.

- For products where Return is not initiated, it will show Text as **Return Not Initiated** along with no of quantities.

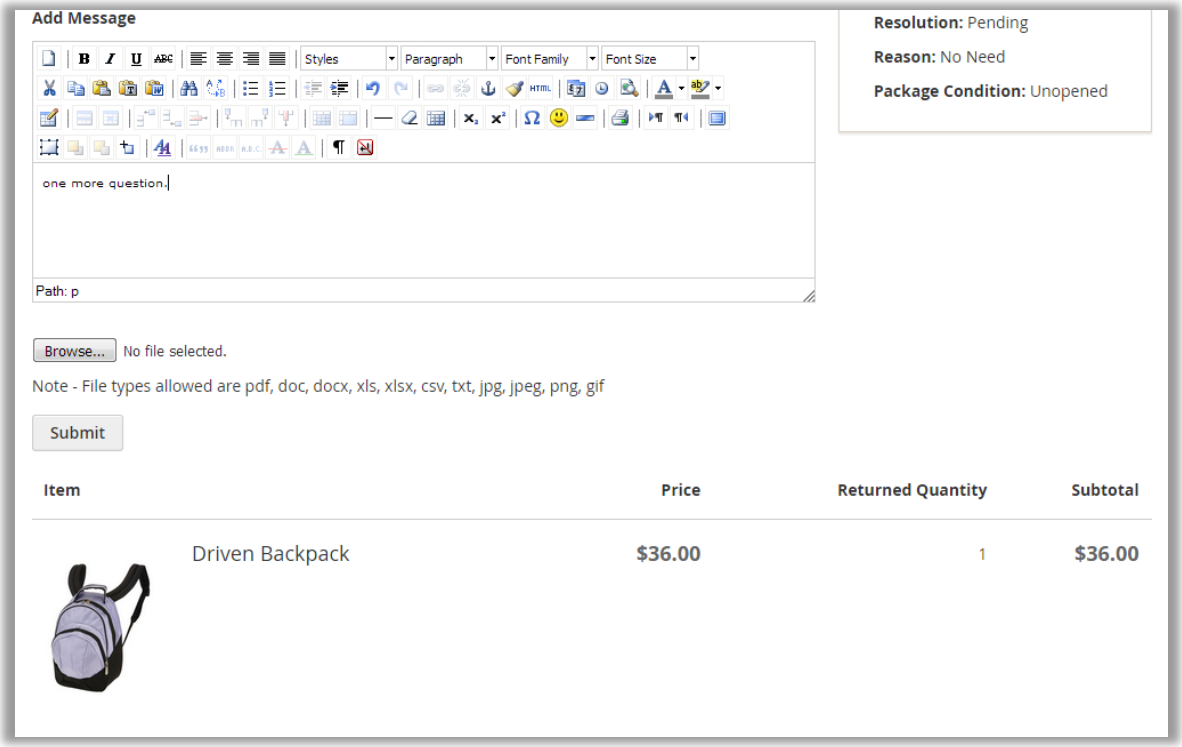


- Click on **Submit** to save the return request.
- If all the products are already returned for the order then Submit button wont come on this page, you can only see the previous requests detail on click on **Request Status** from each product.

- When return request is saved customer can view the request status and can also add message to the request.
- Whenever customer creates return request admin and customer both will receive email regarding the same if configured in configuration.
- Customer will also receive SMS on return request if configured in configuration.

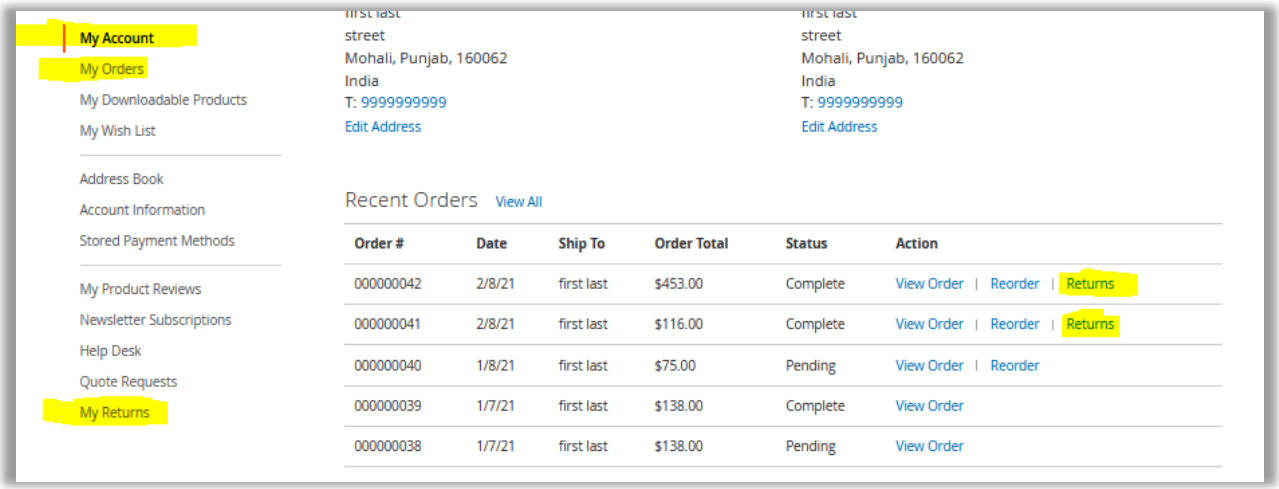


- Whenever customer add message to the request admin will receive email regarding the same if configured in configuration.



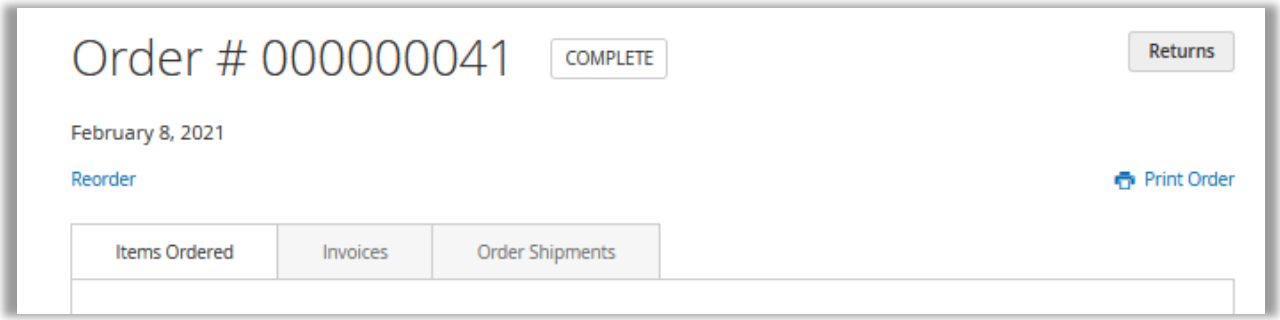
Customer View

- Logged In Customer can return and view return status

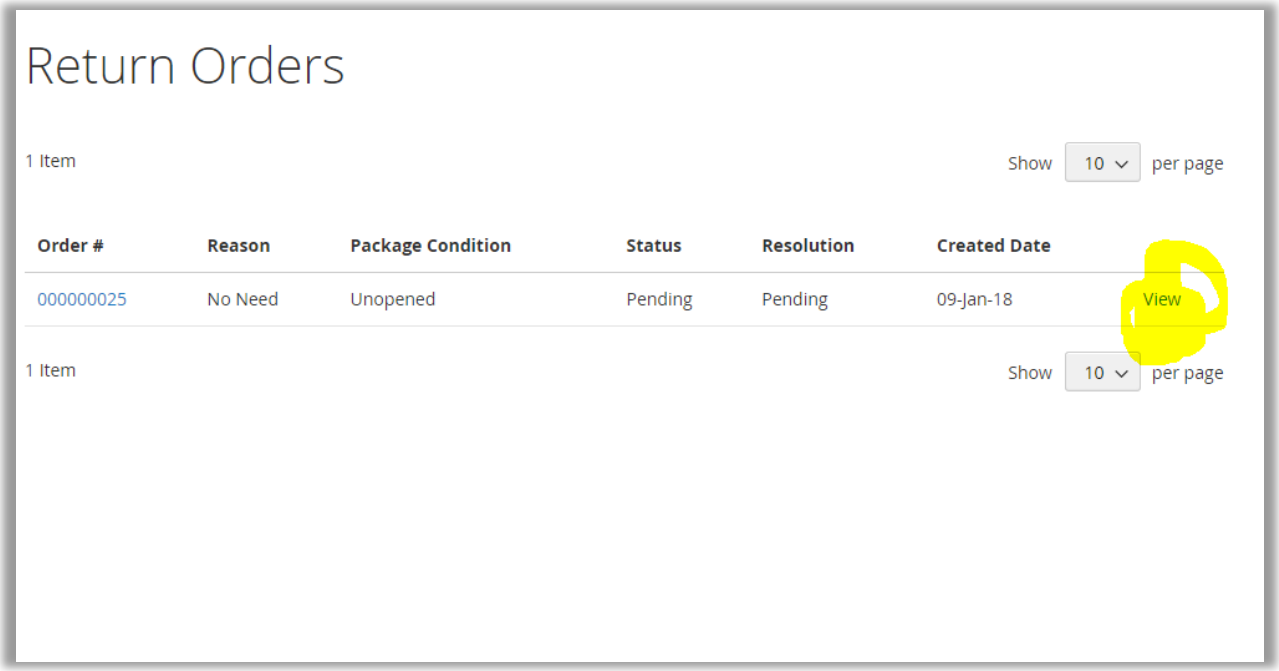


- If RMA extension is enabled, order state is complete and return request deadline days are not over as defined in configuration. **Returns** button will in front of each order on **Recent Orders** in account dashboard and **My Orders** page.
- If Return request is already placed for the order products then also, **Returns** button will appear and you can see previous requests from that page.

- **Returns** button will also appear on **order detail page.**



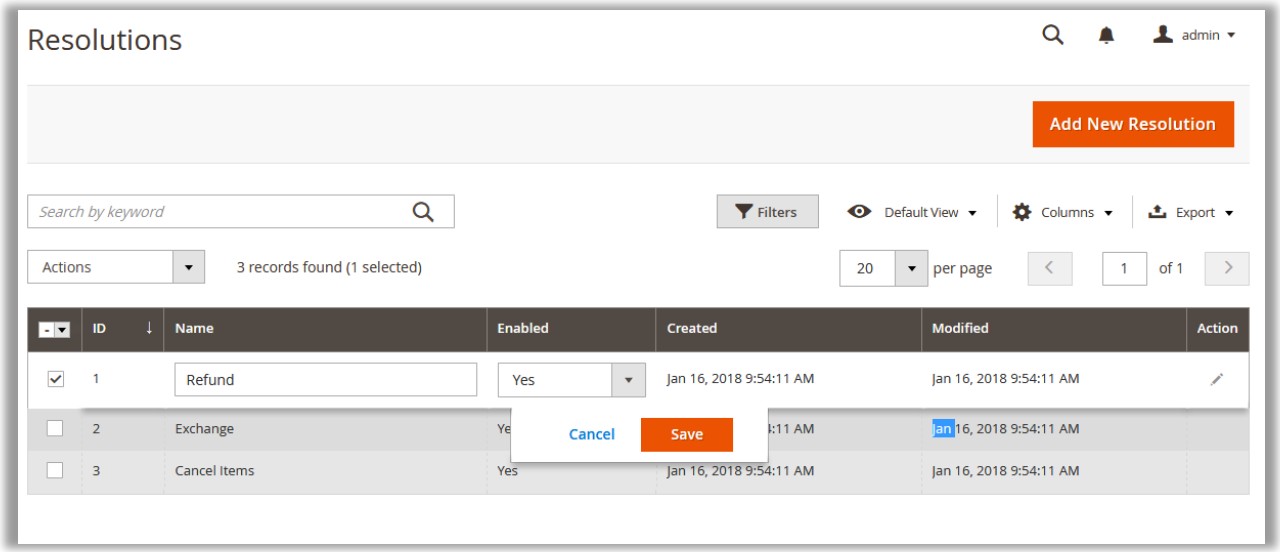
- Customer can place return request for any order and view its status.
- New menu is added in navigation as **My Returns**, all return requests will appear on this page.
- Click on **View** action in front of each return to view full description of return request as in Guest View.



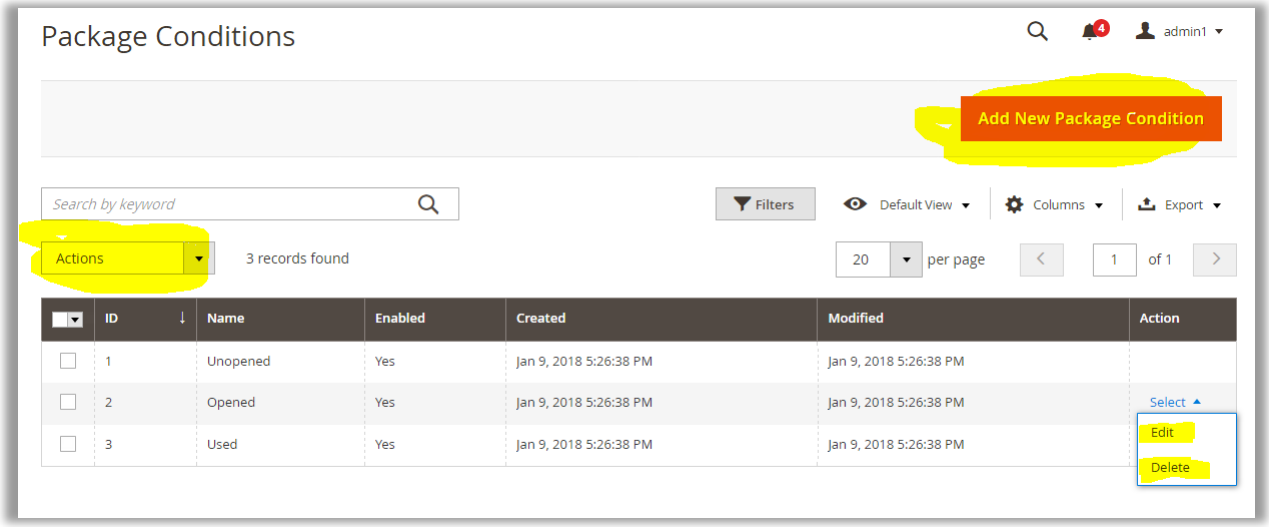
Admin View

- Admin can view and mange all the order returns.

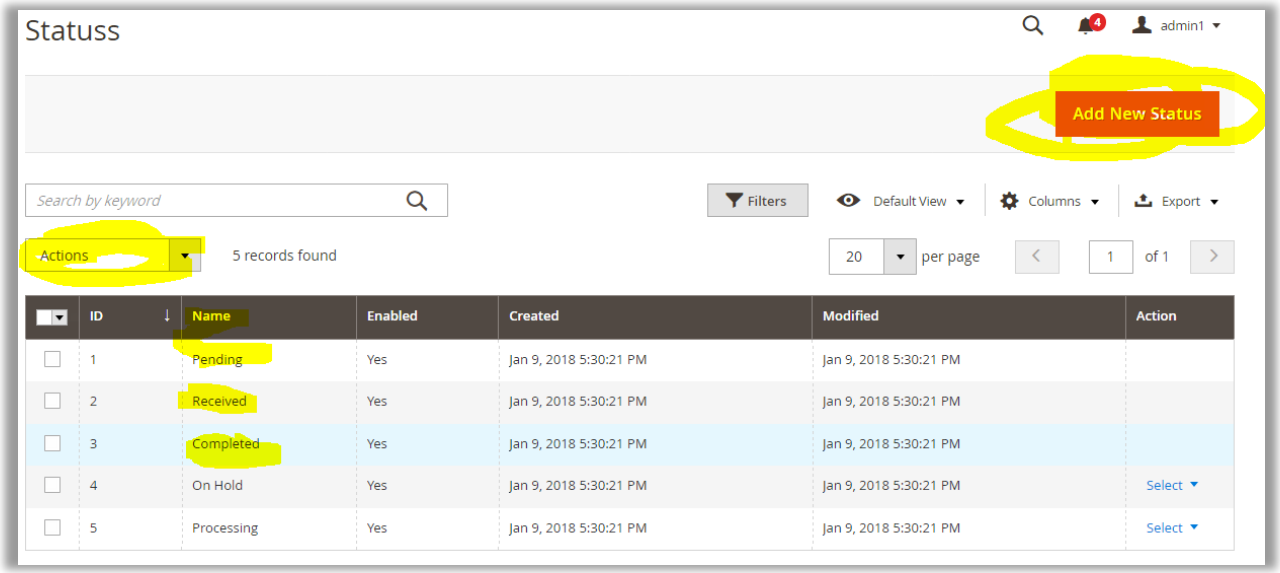
- Manage Resolution – Admin can add edit or delete the resolutions items which are being used in order returns.
    - Module must be enabled with valid License key to add/edit/delete anything in crud.
    - Admin can create new resolution by clicking on Add New Resolution.
    - Edit any resolution name.
    - Enabled must be set to Yes for to be used in order return.
    - Delete single item or Mass Delete from Actions.
    - Some values are predefined in admin, which cannot be even edited/deleted by admin.
    - Predefined value in this Crud areRefund, Exchange, Cancel Items.



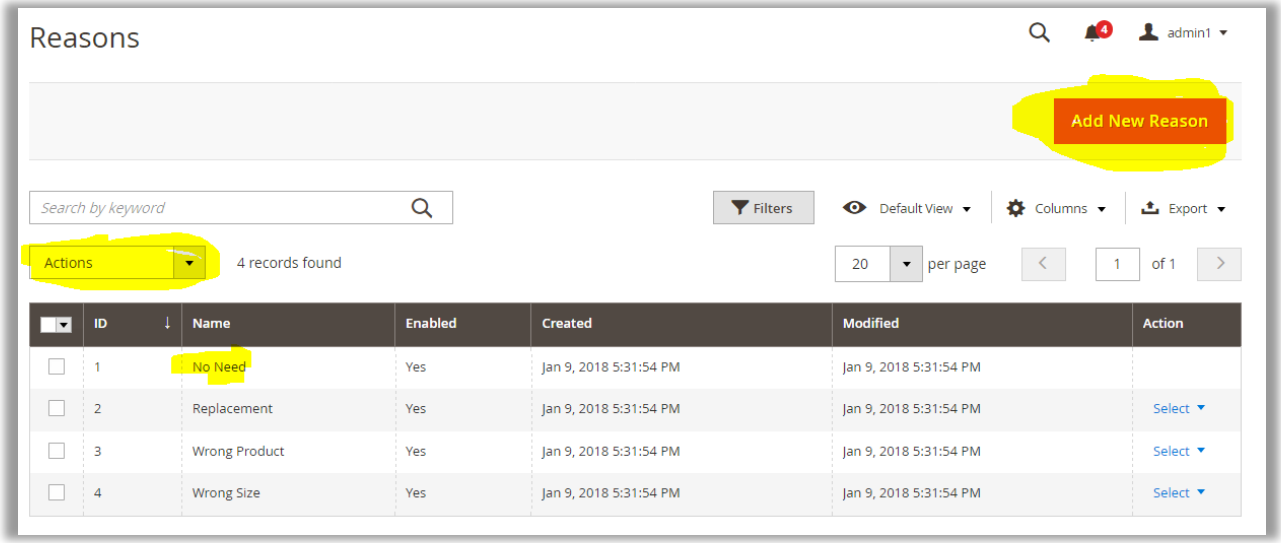
- Manage Package Condition – Admin can add edit or delete the package condition items which are being used in order returns.
    - Module must be enabled with valid License key to add/edit/delete anything in crud.
    - Admin can create new Package Condition by clicking on Add New Package Condition.
    - Edit any Package Condition name.
    - Enabled must be set to Yes for to be used in order return.
    - Delete single item or Mass Delete from Actions.
    - Some values are predefined in admin, which cannot be even edited/deleted by admin.
    - Predefined value in this Crud is Unopened.



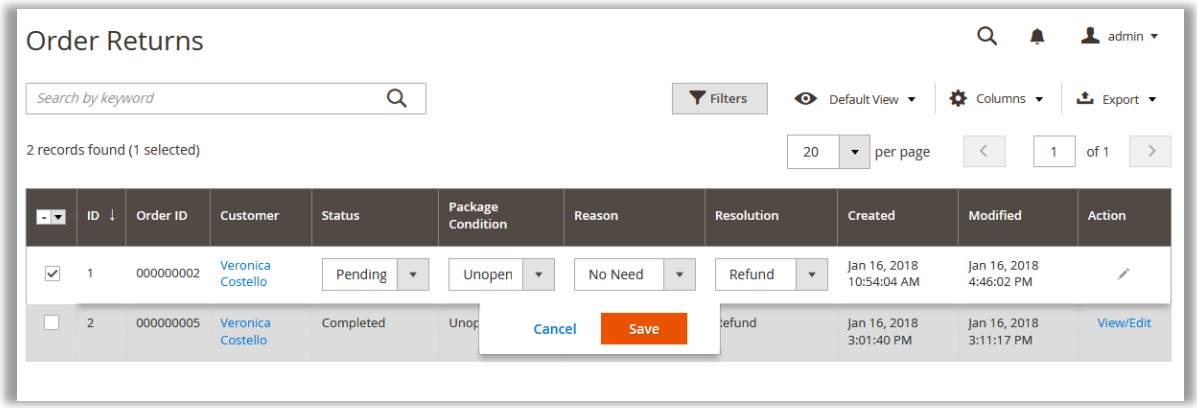
- **Manage Status** – Admin can add edit or delete the status items which are being used in order returns.
    - Module must be enabled with valid License key to add/edit/delete anything in crud.
    - Admin can create new status by clicking on **Add New Status**.
    - **Edit** any Status name.
    - **Enabled** must be set to **Yes** for to be used in order return.
    - **Delete** single item or **Mass Delete** from Actions.
    - Some values are predefined in admin, which cannot be even edited/deleted by admin.
    - Predefined value in this Crud are**Pending, Received, Completed.**



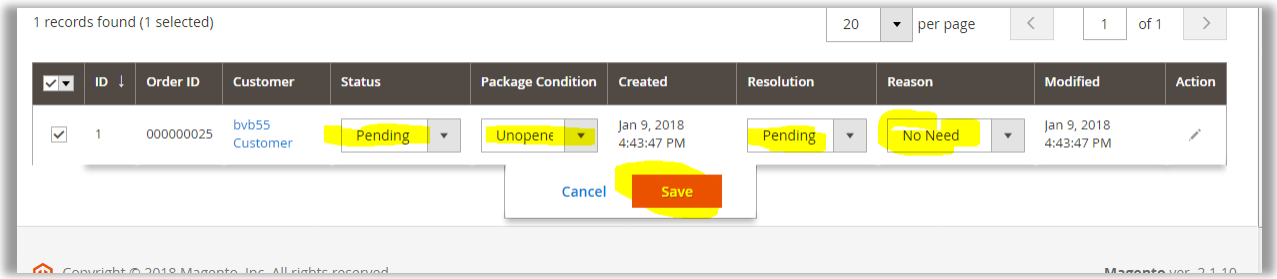
- **Manage Reason** – Admin can add edit or delete the reason items which are being used in order returns.
    - Module must be enabled with valid License key to add/edit/delete anything in crud.
    - Admin can create new status by clicking on **Add New Reason**.
    - **Edit** any Reason name.
    - **Enabled** must be set to **Yes** for to be used in order return.
    - **Delete** single item or **Mass Delete** from Actions.
    - Some values are predefined in admin, which cannot be even edited/deleted by admin.
    - Predefined value in this Crud is **No Need.**



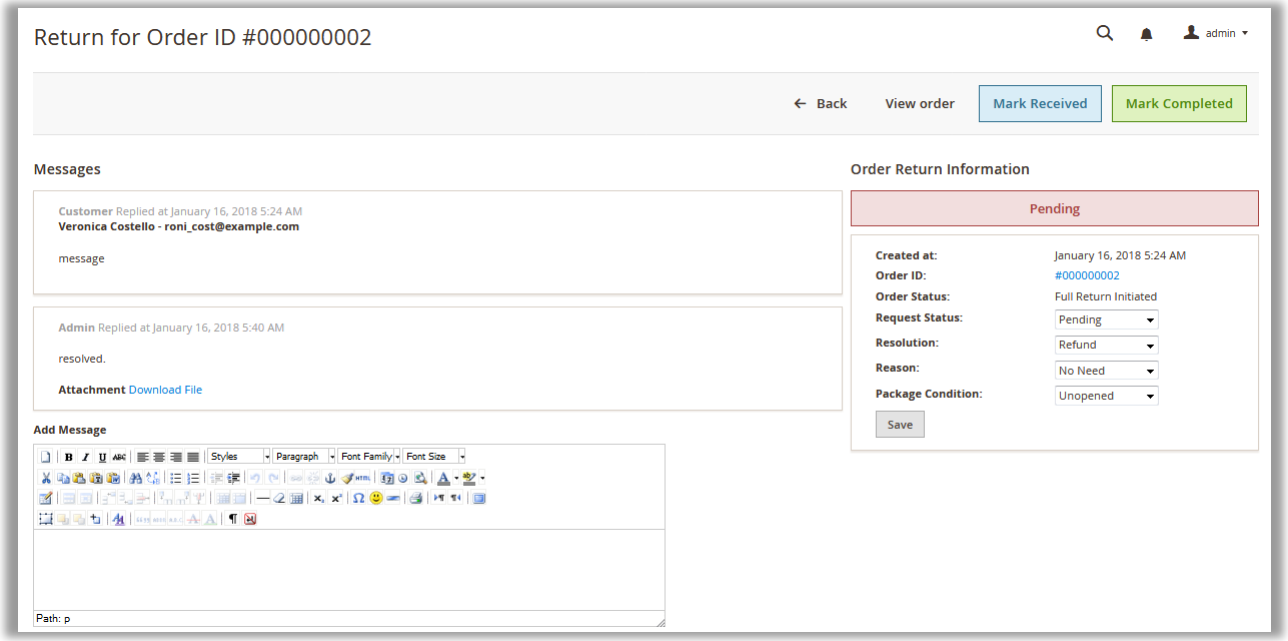
- Manage Order Returns – Admin can view return request placed by customers/guests.
    - Module must be enabled with valid License key to add/edit/delete anything in crud.
    - Admin can view list of order return.
    - If order was placed by customer, customer link appears on grid in customer name else just customer name will appear.



    - Admin can change anything for this request using inline editor.
    - Whenever Admin change the status of the request from inline editor. Customer will receive Email and SMS regarding the same if configured in Configuration.



    - Click on View/Edit button to view details.

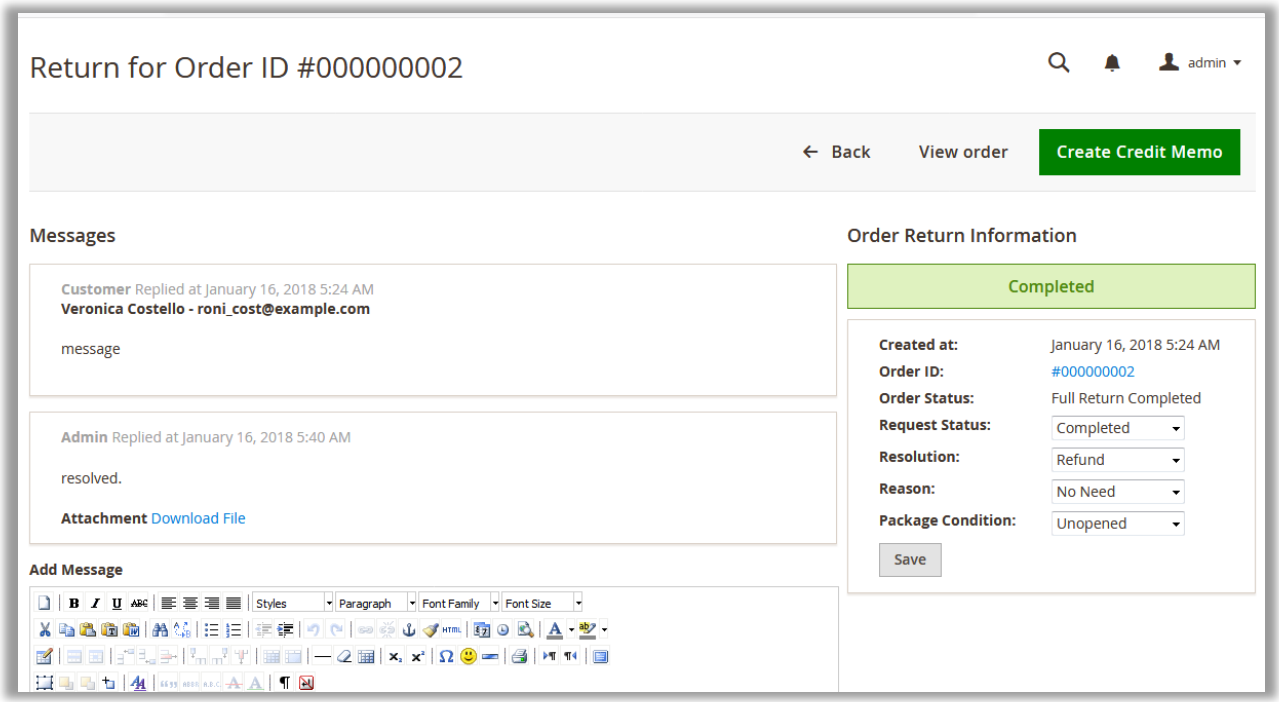


- Admin can Mark the request **Received** from link on top to change the status of the request to Received.
- Admin can Mark the request **Completed** from link on top to change the status of the request to Received.
- Current status of the request is shown on right side under Order Return Information.
- Admin can change **Status, Resolution, Reason, Package Condition** for this request from right side for this request and click on **Save** button.
- Admin can also add message with attachment for this request.
- Whenever Admin change the status of the request. Customer will receive Email and SMS regarding the same if configured in Configuration.
- Whenever Admin add message to the request. Customer will receive Email and SMS regarding the same if configured in Configuration.
- When status of the request is Completed New button will appear on top **Create Credit Memo.**
- Click on the button and create credit memo for this order to refund the money for this order. Admin has to select product and quantity separately for credit memo for partial refund.

Order Status –

- **Partial Return Initiated Status—** This status will be assigned to order when partial products from the order are requested to return. When admin changed the return request status to "**Received**" or click on **"Mark as Received"**, this status will be set main order.

- **Partial Return Completed Status–** This status will be assigned to order when partial products from the order are requested to return. When admin changed the return request status to "**Completed**" or click on **"Mark as Completed"**, this status will be set to main order.
- **Full Return Initiated Status–** This status will be assigned to order when all products for the order are requested to return. When admin changed the return request status to "**Received**" or click on **"Mark as Received"**, this status will be set to main order.
- **Full Return Completed–** This status will be assigned to order when partial products from the order are requested to return. When admin changed the return request status to "**Completed**" or click on **"Mark as Completed"**, this status will be set to main order.



Support

In case of any issues, please report at http://helpdesk.purpletreesoftware.comwith following information:

- FTP credentials information
- Database credentials and access URL
- Magento admin credentialsand access URL