

## Product Return RMA with SMS

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## Installation Instructions

### Installation by composer

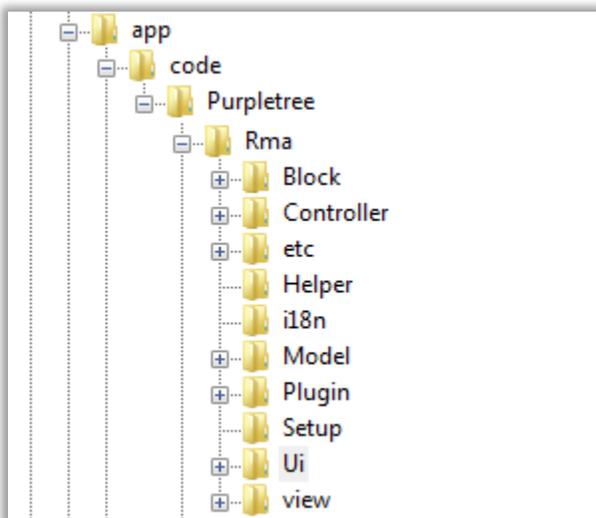
- Update Magento's composer.json
- If you haven't done so already, change to your environment root directory.

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.



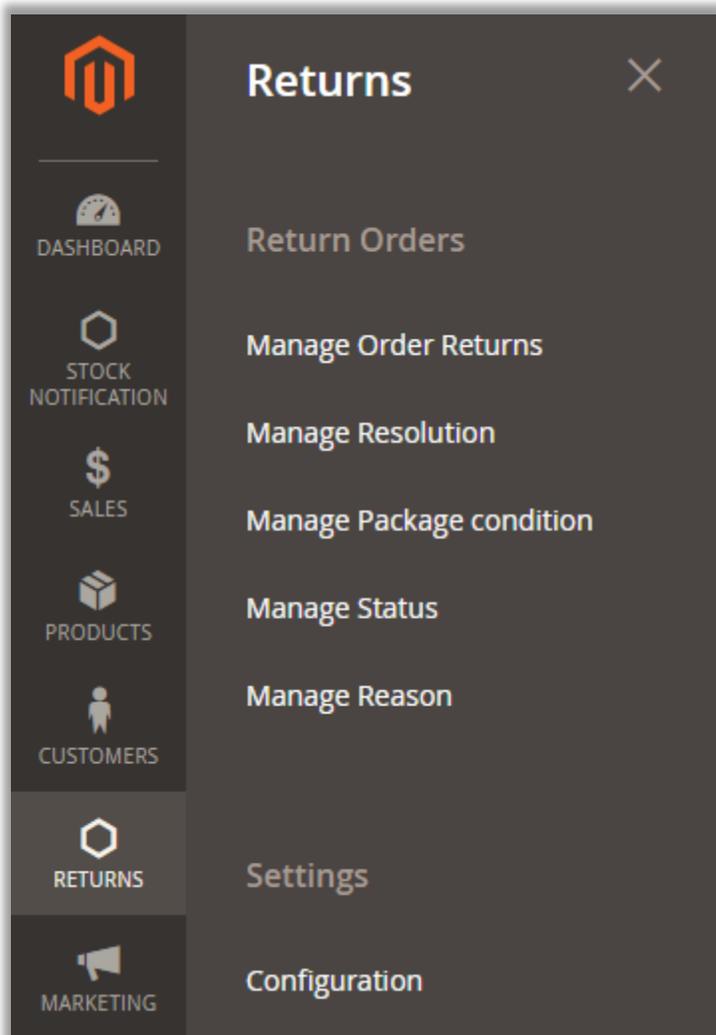
From shell/command prompt, run following commands from Magento root directory:

**`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.**



## Order Status

**Partial Return Initiated Status**  
[store view]

Partial Return Initiated

Select status which will be set on partial products return, this status will set when status of order return is set to received by admin.

**Partial Return Completed Status**  
[store view]

Partial Return Completed

Select status which will be set on partial products return, this status will set when status of order return is set to completed by admin.

**Full Return Initiated Status**  
[store view]

Full Return Initiated

Select status which will be set on all products return, this status will set when status of order return is set to received by admin.

**Full Return Completed**  
[store view]

Full Return Completed

Select status which will be set on all products return, this status will set when status of order return is set to completed by admin.

## 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.

### Email Configuration

|  |   |
|--|---|
| <b>Admin Notification Emails</b><br><small>[global]</small>                    | <input type="text" value="Yes"/>  |
|  | <small>Admin wants to receive emails.</small>   |
| <b>Admin Email Address</b><br><small>[global]</small>                          | <input type="text" value="Sales Representative"/>   |
| <b>Emails to Admin on different events</b><br><small>[global]</small>          | <div style="border: 1px solid #ccc; padding: 5px; background-color: #e0f0ff;">           Return Request Initiated<br/>           Message added by Customer         </div>                                     |
| <b>Customer/Guest Notification Emails</b><br><small>[global]</small>           | <input type="text" value="Yes"/>  |
|  | <small>Customer/Guest wants to receive emails.</small>  |
| <b>Emails to Customer/Guest on different events</b><br><small>[global]</small> | <div style="border: 1px solid #ccc; padding: 5px; background-color: #e0f0ff;">           Return Request Initiated<br/>           Status Changed by Admin<br/>           Message added by Admin         </div> |

### 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_`

### SMS Configuration

**SMS Enable** [global] Yes

**SMS API URL** [store view]   
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]   
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]   
Note use these variable:- \_NAME\_(for Customer name), \_ORDERID\_(for Order id), \_STATUS\_(for Status), \_URL\_(for store url).

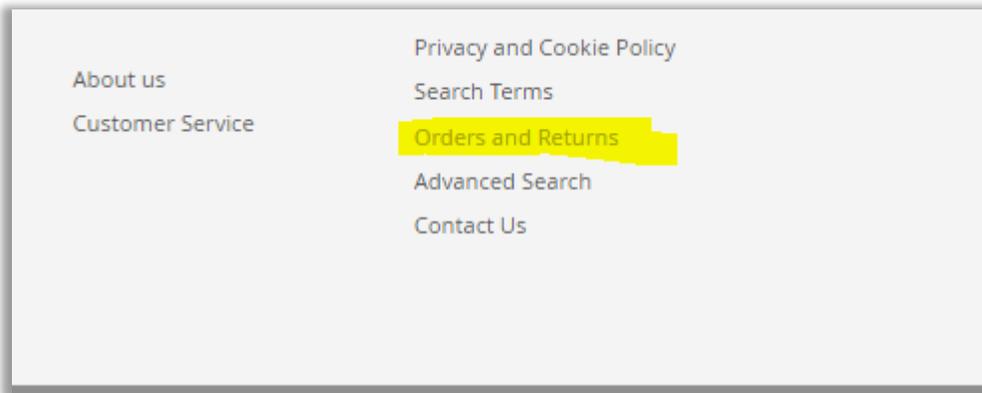
**SMS on Message added by admin** [global] Yes

**Comment Template** [store view]   
Note use these variable:- \_NAME\_(for Customer name), \_ORDERID\_(for Order id), \_URL\_(for store url).

## Guest Side

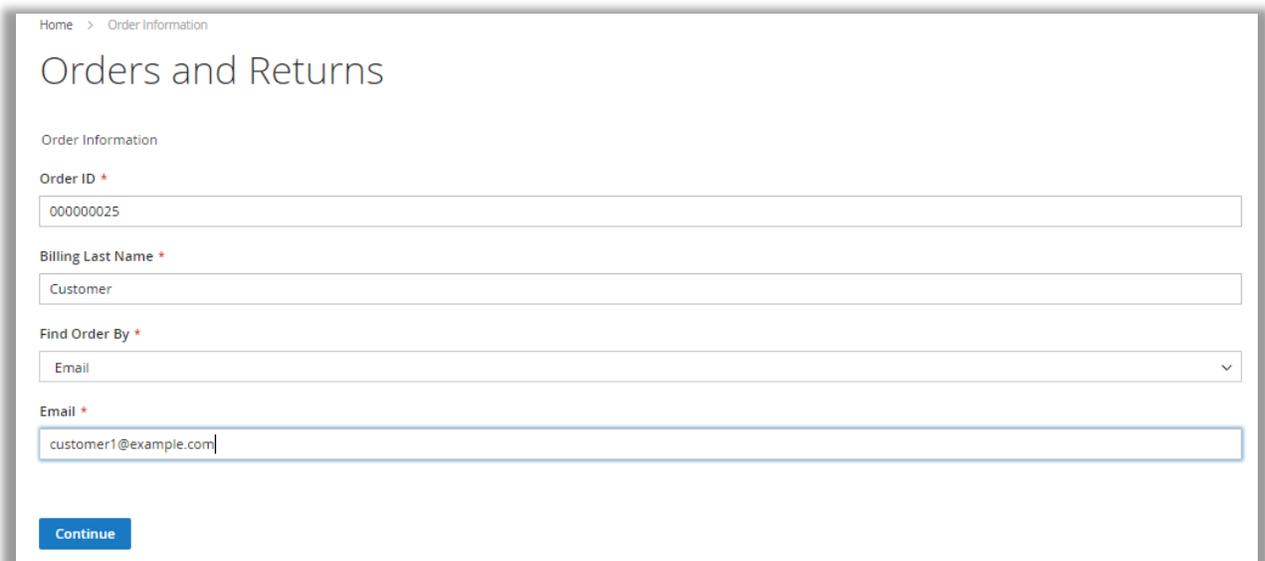
### Orders and Return

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.



Home > Order Information

## Orders and Returns

Order Information

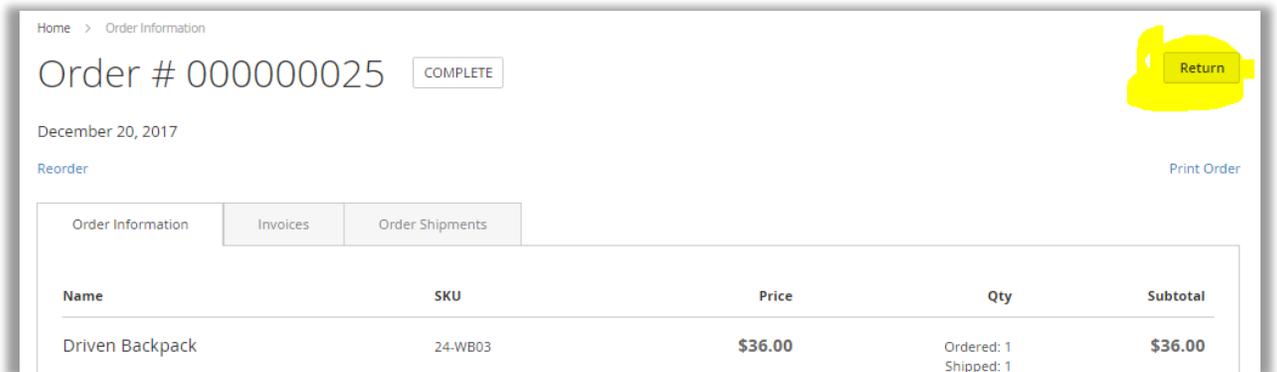
Order ID \*

Billing Last Name \*

Find Order By \*

Email \*

- 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.



Home > Order Information

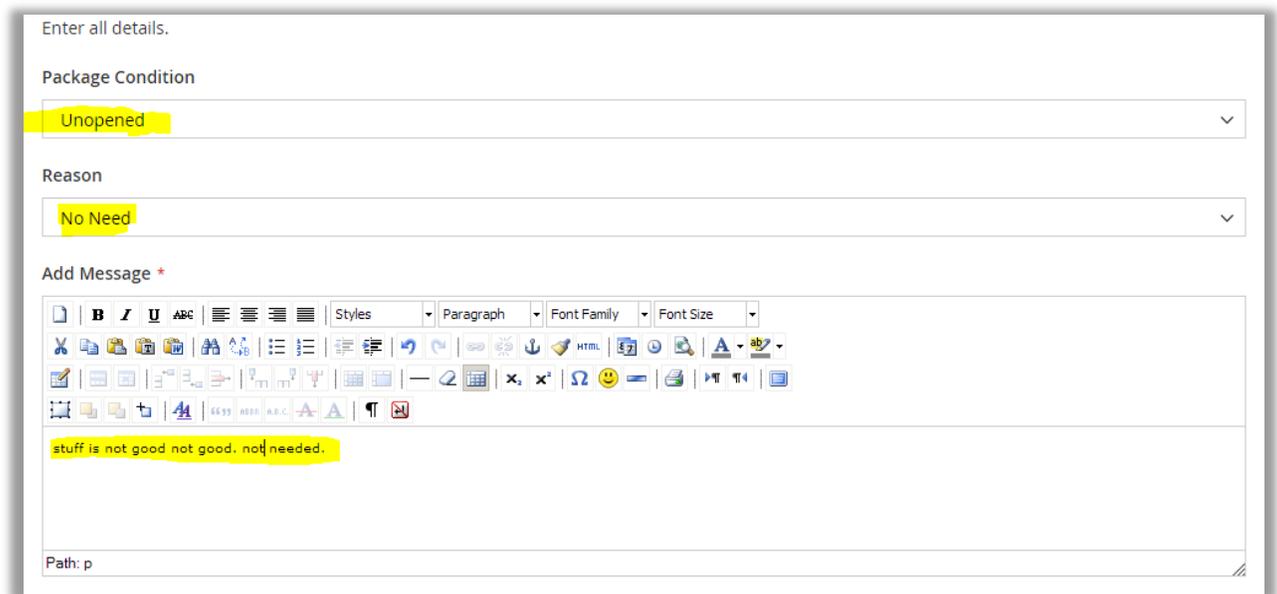
Order # 000000025 COMPLETE

December 20, 2017

Reorder Print Order

| Name            | SKU     | Price   | Qty                      | Subtotal |
|-----------------|---------|---------|--------------------------|----------|
| Driven Backpack | 24-WB03 | \$36.00 | Ordered: 1<br>Shipped: 1 | \$36.00  |

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



Enter all details.

Package Condition

Unopened

Reason

No Need

Add Message \*

stuff is not good not good. not needed.

Path: p

- 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.

**Attachment**

No file selected.

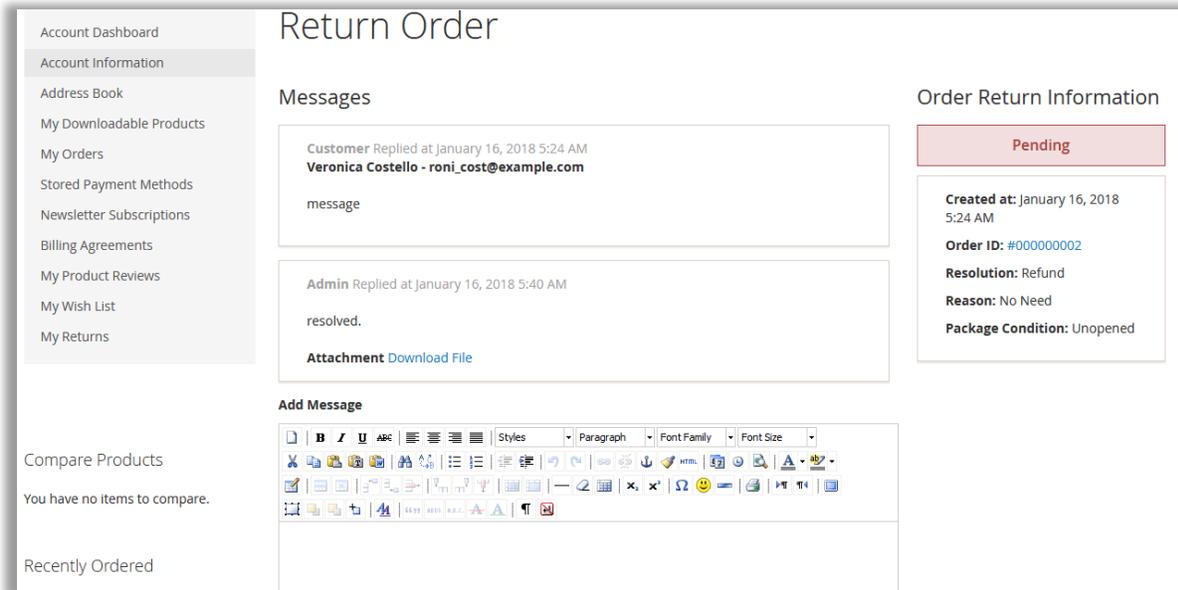
Note - File types allowed are pdf, doc, docx, xls,xlsx, csv, txt, jpg, jpeg, png, gif

| Select                              | Item   | Return Status   | Price   | Returned Quantity | Subtotal |
|-------------------------------------|--|---|---------|-------------------|----------|
| <input checked="" type="checkbox"/> | <br>Echo Fit Compression Short<br>Size: 29<br>Color: Blue   | Pending - 1   | \$24.00 | 0                 | \$24.00  |
| <input checked="" type="checkbox"/> | <br>Gwen Drawstring Bike Short<br>Size: 29<br>Color: Gray  | Pending - 2   | \$50.00 | 0                 | \$100.00 |
| <input checked="" type="checkbox"/> | <br>Fiona Fitness Short<br>Size: 31<br>Color: Red         | Return Not initiated - 3  | \$29.00 | 3                 | \$87.00  |
| <input checked="" type="checkbox"/> | <br>Ida Workout Parachute Pant<br>Size: 29<br>Color: Blue | Pending - 1<br>Pending - 1<br>Pending - 1<br>Return Not initiated - 1 | \$48.00 | 1                 | \$192.00 |

Click here to indicate that you have read and agree to the terms presented in the [Terms and Conditions agreement](#)

- 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.



Account Dashboard  
Account Information  
Address Book  
My Downloadable Products  
My Orders  
Stored Payment Methods  
Newsletter Subscriptions  
Billing Agreements  
My Product Reviews  
My Wish List  
My Returns

## Return Order

### Messages

Customer Replied at January 16, 2018 5:24 AM  
**Veronica Costello - roni\_cost@example.com**  
message

Admin Replied at January 16, 2018 5:40 AM  
resolved.  
**Attachment** [Download File](#)

### Add Message

Compare Products  
You have no items to compare.

Recently Ordered

### Order Return Information

**Pending**

**Created at:** January 16, 2018 5:24 AM  
**Order ID:** #00000002  
**Resolution:** Refund  
**Reason:** No Need  
**Package Condition:** Unopened

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

### Add Message

one more question.]

Path: p

No file selected.

Note - File types allowed are pdf, doc, docx, xls, xlsx, csv, txt, jpg, jpeg, png, gif

**Resolution:** Pending

**Reason:** No Need

**Package Condition:** Unopened

| Item  | Price                      | Returned Quantity | Subtotal |
|---|----------------------------|-------------------|----------|
|  | Driven Backpack<br>\$36.00 | 1                 | \$36.00  |

### Customer View

- Logged In Customer can return and view return status

- My Account**
- My Orders
- My Downloadable Products
- My Wish List
- Address Book
- Account Information
- Stored Payment Methods
- My Product Reviews
- Newsletter Subscriptions
- Help Desk
- Quote Requests
- My Returns**

first last  
street  
Mohali, Punjab, 160062  
India  
T: 9999999999  
[Edit Address](#)

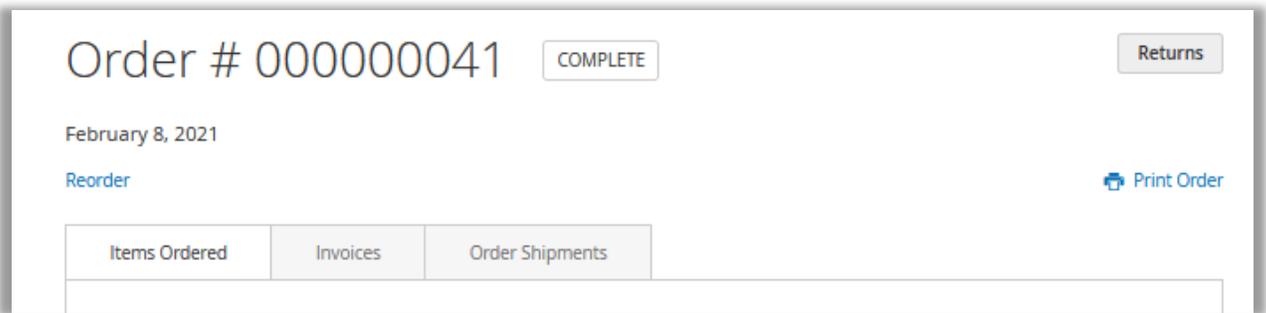
first last  
street  
Mohali, Punjab, 160062  
India  
T: 9999999999  
[Edit Address](#)

Recent Orders [View All](#)

| Order #  | Date   | Ship To    | Order Total | Status   | Action   |
|----------|--------|------------|-------------|----------|--|
| 00000042 | 2/8/21 | first last | \$453.00    | Complete | <a href="#">View Order</a>   <a href="#">Reorder</a>   <a href="#">Returns</a> |
| 00000041 | 2/8/21 | first last | \$116.00    | Complete | <a href="#">View Order</a>   <a href="#">Reorder</a>   <a href="#">Returns</a> |
| 00000040 | 1/8/21 | first last | \$75.00     | Pending  | <a href="#">View Order</a>   <a href="#">Reorder</a>                           |
| 00000039 | 1/7/21 | first last | \$138.00    | Complete | <a href="#">View Order</a>   |
| 00000038 | 1/7/21 | first last | \$138.00    | Pending  | <a href="#">View Order</a>   |

- 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**.



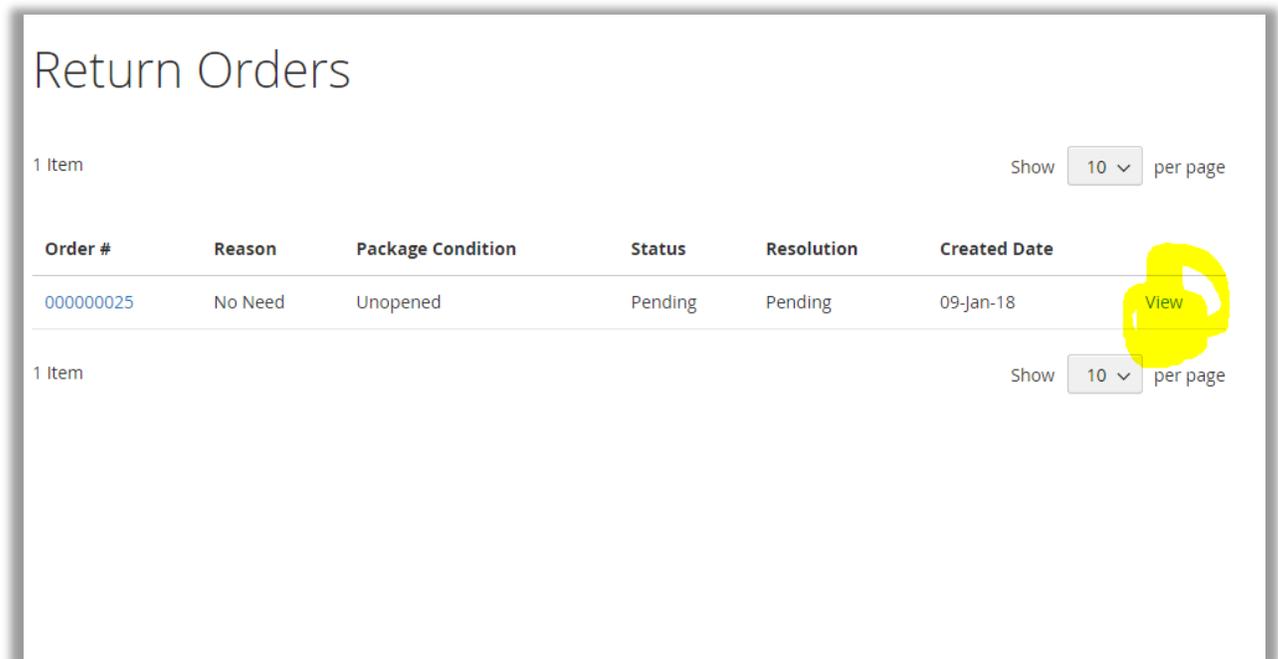
Order # 000000041 COMPLETE Returns

February 8, 2021

[Reorder](#) Print Order

Items Ordered | Invoices | Order Shipments

- 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.



## Return Orders

1 Item Show 10 per page

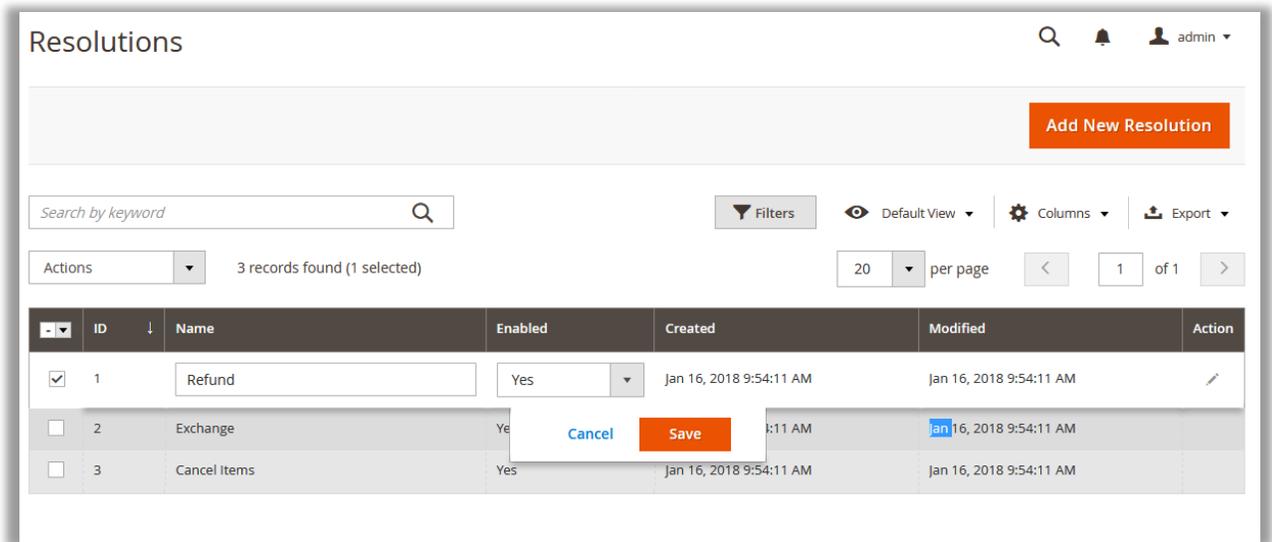
| Order #   | Reason  | Package Condition | Status  | Resolution | Created Date |                      |
|-----------|---------|-------------------|---------|------------|--------------|----------------------|
| 000000025 | No Need | Unopened          | Pending | Pending    | 09-Jan-18    | <a href="#">View</a> |

1 Item Show 10 per page

### Admin View

- Admin can view and manage 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 are **Refund, Exchange, Cancel Items**.



The screenshot displays the 'Resolutions' management page. At the top right, there is a search icon, a notification bell, and a user profile dropdown for 'admin'. Below this is a prominent orange 'Add New Resolution' button. A search bar with the placeholder 'Search by keyword' and a magnifying glass icon is present. To the right of the search bar are controls for 'Filters', 'Default View', 'Columns', and 'Export'. Below these are 'Actions' and '3 records found (1 selected)'. A pagination control shows '20 per page' and '1 of 1'. The main table has columns for 'ID', 'Name', 'Enabled', 'Created', 'Modified', and 'Action'. The first row (ID 1) is 'Refund' with 'Enabled' set to 'Yes'. The second row (ID 2) is 'Exchange' with 'Enabled' set to 'Yes'. The third row (ID 3) is 'Cancel Items' with 'Enabled' set to 'Yes'. A modal dialog is open over the 'Exchange' row, containing 'Cancel' and 'Save' buttons.

| ID | Name         | Enabled | Created                 | Modified                | Action |
|----|--------------|---------|-------------------------|-------------------------|--------|
| 1  | Refund       | Yes     | Jan 16, 2018 9:54:11 AM | Jan 16, 2018 9:54:11 AM |        |
| 2  | Exchange     | Yes     | Jan 16, 2018 9:54:11 AM | Jan 16, 2018 9:54:11 AM |        |
| 3  | Cancel Items | Yes     | Jan 16, 2018 9:54:11 AM | Jan 16, 2018 9:54:11 AM |        |

- **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**.

Package Conditions

4 admin1

Add New Package Condition

Actions 3 records found

 per page
 
 of 1

|                          | ID | Name     | Enabled | Created                | Modified               | Action   |
|--------------------------|----|----------|---------|------------------------|------------------------|--|
| <input type="checkbox"/> | 1  | Unopened | Yes     | Jan 9, 2018 5:26:38 PM | Jan 9, 2018 5:26:38 PM |  |
| <input type="checkbox"/> | 2  | Opened   | Yes     | Jan 9, 2018 5:26:38 PM | Jan 9, 2018 5:26:38 PM | <span style="font-size: 0.8em; color: #007bff;">Select</span>  |
| <input type="checkbox"/> | 3  | Used     | Yes     | Jan 9, 2018 5:26:38 PM | Jan 9, 2018 5:26:38 PM | <span style="background-color: #f96; padding: 2px 5px;">Edit</span><br><span style="background-color: #f96; padding: 2px 5px;">Delete</span> |

- **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**.

Status

Search by keyword

5 records found  per page  of 1

| ID | Name       | Enabled | Created                | Modified               | Action |
|----|------------|---------|------------------------|------------------------|--------|
| 1  | Pending    | Yes     | Jan 9, 2018 5:30:21 PM | Jan 9, 2018 5:30:21 PM |        |
| 2  | Received   | Yes     | Jan 9, 2018 5:30:21 PM | Jan 9, 2018 5:30:21 PM |        |
| 3  | Completed  | Yes     | Jan 9, 2018 5:30:21 PM | Jan 9, 2018 5:30:21 PM |        |
| 4  | On Hold    | Yes     | Jan 9, 2018 5:30:21 PM | Jan 9, 2018 5:30:21 PM | Select |
| 5  | Processing | Yes     | Jan 9, 2018 5:30:21 PM | Jan 9, 2018 5:30:21 PM | Select |

- **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**.

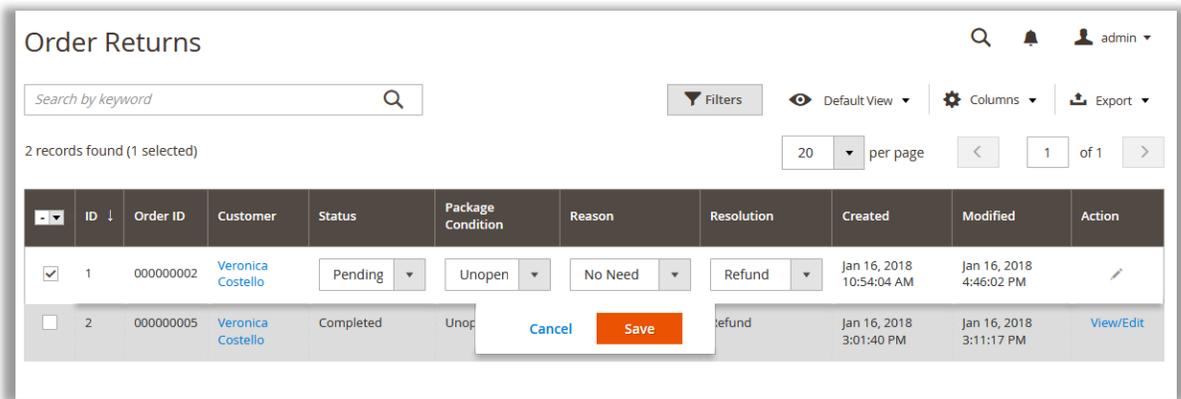
Reasons

Search by keyword

4 records found  per page  of 1

| ID | Name          | Enabled | Created                | Modified               | Action |
|----|---------------|---------|------------------------|------------------------|--------|
| 1  | No Need       | Yes     | Jan 9, 2018 5:31:54 PM | Jan 9, 2018 5:31:54 PM |        |
| 2  | Replacement   | Yes     | Jan 9, 2018 5:31:54 PM | Jan 9, 2018 5:31:54 PM | Select |
| 3  | Wrong Product | Yes     | Jan 9, 2018 5:31:54 PM | Jan 9, 2018 5:31:54 PM | Select |
| 4  | Wrong Size    | Yes     | Jan 9, 2018 5:31:54 PM | Jan 9, 2018 5:31:54 PM | Select |

- **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.



Order Returns

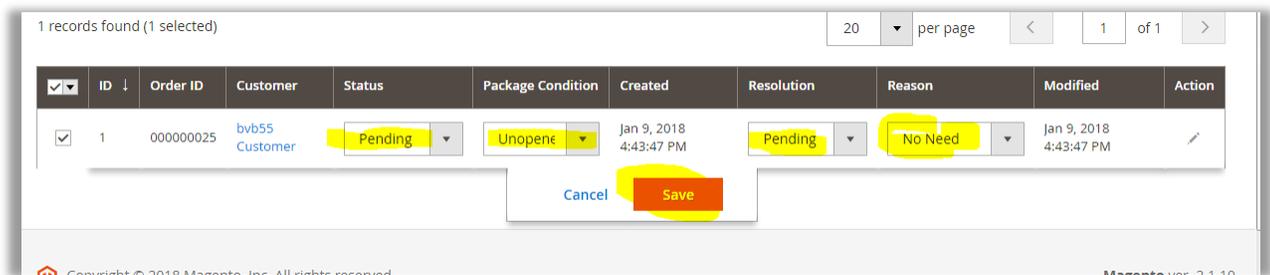
Search by keyword

Filters Default View Columns Export

2 records found (1 selected) 20 per page 1 of 1

| ID                                  | Order ID | Customer                          | Status    | Package Condition | Reason  | Resolution | Created                  | Modified                | Action                    |
|-------------------------------------|----------|-----------------------------------|-----------|-------------------|---------|------------|--------------------------|-------------------------|---------------------------|
| <input checked="" type="checkbox"/> | 1        | <a href="#">Veronica Costello</a> | Pending   | Unopen            | No Need | Refund     | Jan 16, 2018 10:54:04 AM | Jan 16, 2018 4:46:02 PM | <a href="#">View/Edit</a> |
| <input type="checkbox"/>            | 2        | <a href="#">Veronica Costello</a> | Completed | Unopen            |         | Refund     | Jan 16, 2018 3:01:40 PM  | Jan 16, 2018 3:11:17 PM | <a href="#">View/Edit</a> |

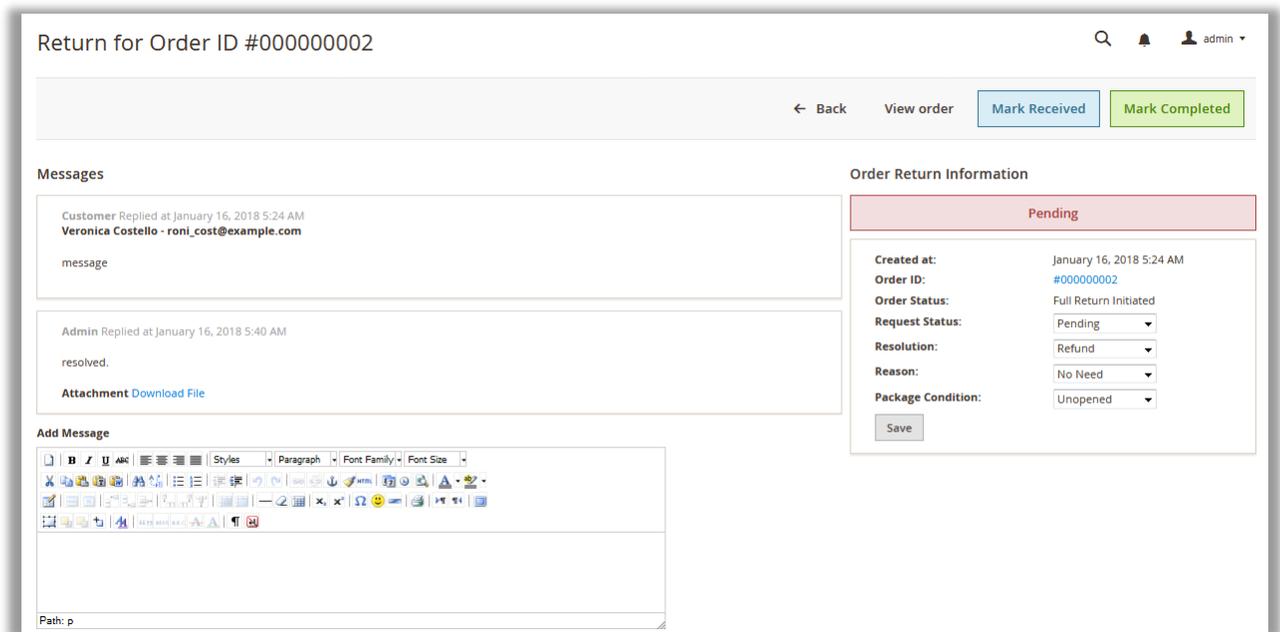
- Admin can change anything for this request using inline editor.
- Whenever Admin change the status of the request from inline editor. Customer will receive Email and SMS regarding the same if configured in Configuration.



1 records found (1 selected) 20 per page 1 of 1

| ID                                  | Order ID | Customer                       | Status  | Package Condition | Created                | Resolution | Reason  | Modified               | Action                    |
|-------------------------------------|----------|--------------------------------|---------|-------------------|------------------------|------------|---------|------------------------|---------------------------|
| <input checked="" type="checkbox"/> | 1        | <a href="#">bvb55 Customer</a> | Pending | Unopen            | Jan 9, 2018 4:43:47 PM | Pending    | No Need | Jan 9, 2018 4:43:47 PM | <a href="#">View/Edit</a> |

- Click on View/Edit button to view details.



Return for Order ID #000000002

← Back View order [Mark Received](#) [Mark Completed](#)

**Messages**

Customer Replied at January 16, 2018 5:24 AM  
 Veronica Costello - roni\_cost@example.com  
 message

Admin Replied at January 16, 2018 5:40 AM  
 resolved.  
 Attachment [Download File](#)

**Add Message**

Path: p

**Order Return Information**

**Pending**

Created at: January 16, 2018 5:24 AM  
 Order ID: #000000002  
 Order Status: Full Return Initiated  
 Request Status: Pending  
 Resolution: Refund  
 Reason: No Need  
 Package Condition: Unopened

[Save](#)

- 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.

Return for Order ID #000000002



 admin

← Back
View order
Create Credit Memo

#### Messages

**Customer** Replied at January 16, 2018 5:24 AM  
**Veronica Costello - roni\_cost@example.com**

message

**Admin** Replied at January 16, 2018 5:40 AM

resolved.

**Attachment** [Download File](#)

**Add Message**

 **B**   ABC
Styles
Paragraph
Font Family
Font Size



#### Order Return Information

**Completed**

|                           |  |
|---------------------------|--|
| <b>Created at:</b>        | January 16, 2018 5:24 AM               |
| <b>Order ID:</b>          | <a href="#">#000000002</a>             |
| <b>Order Status:</b>      | Full Return Completed                  |
| <b>Request Status:</b>    | <input type="text" value="Completed"/> |
| <b>Resolution:</b>        | <input type="text" value="Refund"/>    |
| <b>Reason:</b>            | <input type="text" value="No Need"/>   |
| <b>Package Condition:</b> | <input type="text" value="Unopened"/>  |

## Support

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In case of any issues, please report at <http://helpdesk.purpletreesoftware.com> with following information:

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