

Module RMA

User Manual

Summary

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" The place for ecommerce management tools "

Overview

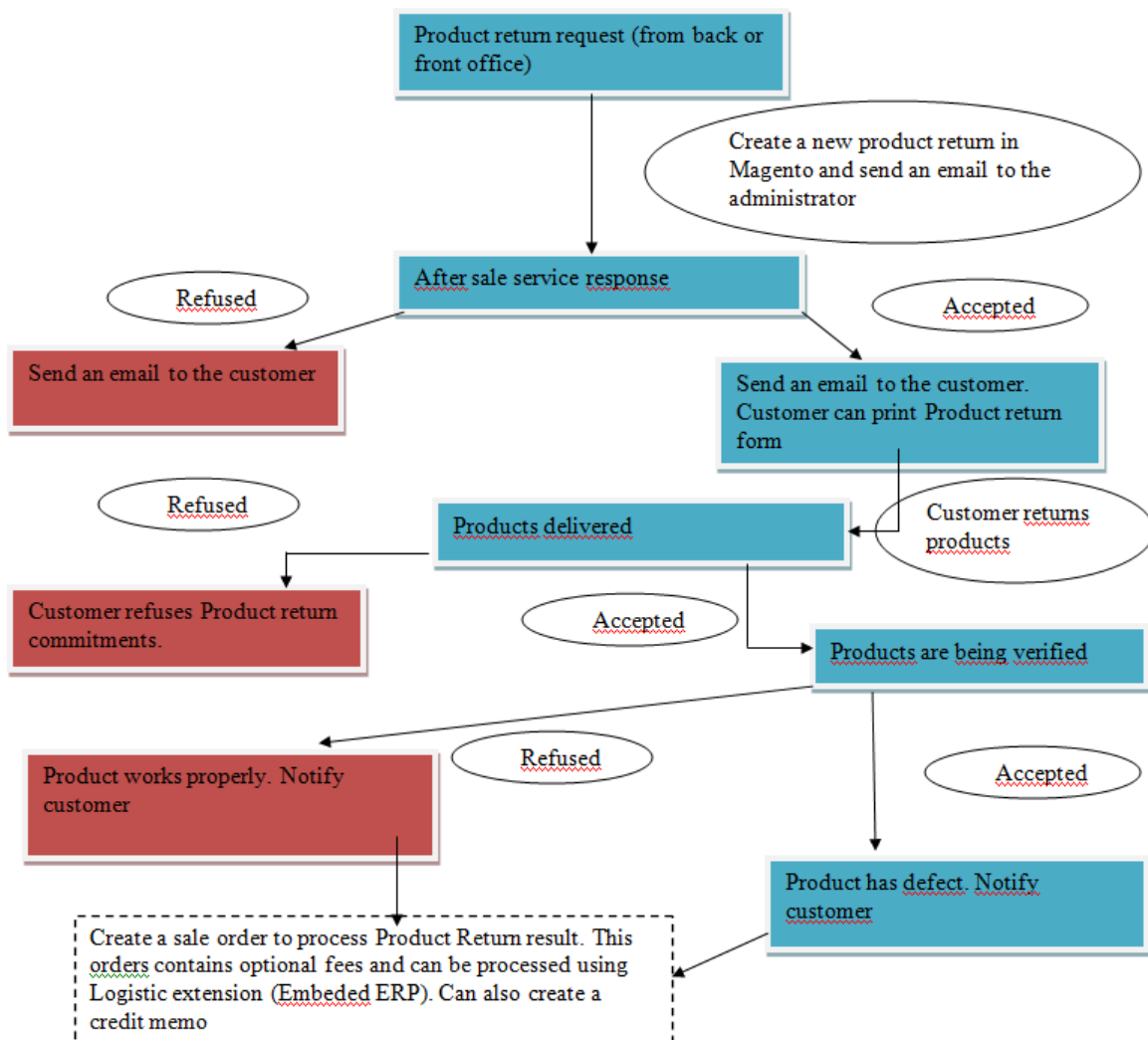
Product return / Rma extension for magento is designed to manage product return for an order and easily track progress

Customer can request for a new product return, check product return progress and print product return form

Main features :

- Customer can request for a new product return
- Customer and administrator are notified each time an action is made
- Validity date management
- Product return form printing (PDF)
- Product exchange, refund, return to customer
- Stock management (back to stock)

Global process



Installation

Upload files

Source	Target	Comment
app/code/local/MDN/ProductReturn	app/code/local/MDN/	
app/design/adminhtml/default/default/layout/*	app/design/adminhtml/default/default/layout/	
app/design/adminhtml/default/default/template/*	app/design/adminhtml/default/default/template/	
app/design/frontend/default/default/layout/*	app/design/frontend/default/default/layout/	Since magento 1.4, server directory is app/design/frontend/base
js/mdn/productReturn.js	js/mdn/	
skin/adminhtml/default/default/purchase/grid-cal.gif	skin/adminhtml/default/default/	
app/locale/*	app/locale/	
app/etc/modules/*	app/etc/modules	

Once all files are uploaded, you have to refresh both magento and index caches

Once caches are refreshed, log out and login from admin panel (to reset permissions)

Create a "fake" product

You have to create a fake product that will be used by Product Return extension when you return products to customer or when you charge customer for additional fees

You have to create a new product that fulfill this requirements :

- Sku : productreturn
- Weight : 0
- Name : fake product return
- Description : fake product return
- Short description : fake product return
- Gestion des stocks : non
- Price : 0
- Status : enabled
- Visibility : nowhere / Not visible individually
- Website : all

Settings

All settings are available from menu System > Configuration > Sales > Product return

Notice: if you have "Access denied" message, you have to logout and login from admin panel to reset permissions

Main settings

Setting	Comment
Default validity duration	Duration (in day) when product return is valid. Once this delay is over, the customer cant print product return form
Allow product return request	If enable, customer can request for a new product return from its customer account

Emails

Next, you have to set email templates to use for each product return status

Setting	Comment
New product return request email	When a customer request for a new product return, an email is sent to the administrator. You must fill here administrator email
Template new product return	Email template to use to notify administrator for a new product return request.
Copy to	Every emails sent from product return extension will be copy to this email address
Email identity	Identity to use to send emails.
Product return refused	Template to use to notify customer that its product return is refused.
Template product return accepted	Template to use to notify customer that its product return is accepted
Template products received	Template to use to notify customer that its products have been received.
Template products received but refused	Template to use to notify customer that its products have been refused but your service refused the package (if it is broken for example)
Template product expertise	Template to use to notify customer that its products are being checked.
Template Product return complete	Template to use to notify customer that its product return has been processed.

Product return

Setting	Comment
Fake product id	Id for the fake product you created
Company address	Address for your company (printed on the product return form).
Reasons	Different product return reasons that can be used for each product : you can set your own reasons separated with a ;
Max day	Duration during your customer can request for a product return once order is invoiced. After this duration, customer cant request for a product return. If you dont wish to set a limit, fill 9999
Default shipping method	Shipping method to use when a new order is create from a RMA
Default billing method	Billing method to use when a new order is create from a RMA

PDF settings

These options help you to customize product return PDF.

Setting	Comment
Company address	Address displayed in the PDF
Header text	Text displayed in PDF header
Footer text	Text to display in PDF footer
Comments	Free comments displayed at the bottom of the PDF (after product list)

Return terms

Once a product return is accepted by your service, customer must print product return form to ship its products. However, to download and print PDF, he must accept terms and conditions.

To fill terms and conditions, go in menus CMS > Static block and select static block with title is "cgv_rma"

Rma management

From Magento admin panel, all features are available under menus ERP > Product return

Find a product return

There are 3 ways to find a product return :

- From menus ERP > Product return > Customer return
- From customer sheet, "Product return" tab
- From sales order sheet, "Product return" tab

Product Returns

[Create New Product Return](#)

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[Reset Filter](#)

[Search](#)

Ref	Date	Customer	Status	Products	Comments	Action
	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	
100000004-1	5 Jul 2010	Zimmermann Olivier	complete	1x Iphone 2x HTC Hd2	Réception mauvaise, même de la main droite :)	View

Create a new product return

Create a new Product return (Solution 1) :

- Select a sales order in magento back office
- Select "product return" tab
- Click on "New Product Return button"
- Fill information (such as Product Return reason)
- Select products to return
- Save

Create a new Product return (Solution 2) :

- Select menu sales > Product return
- Click on "New product return" button
- Select sales order
- Fill information (such as Product Return reason)
- Select products to return
- Save

Manage product return

Available buttons

Button	Description
Reset	Reset every form controls
Print	Print product return form (PDF)
Delete	Definitively delete Product return
Products received	Clicking on this button, you inform the system that products have been received in your service : product return status is set to "Product received", product reception date is stored and an email is sent to your customer
Notify customer	Send an email to your customer : email template depends of the product return status.
Save	Save all product information. If an action is selected for a product (process products tab), they are also executed

Information tab

Main information :

Product Return Edit Back Reset Print Delete Products received Notify Customer Save

General

Reference	<input type="text" value="100000004-1"/>	Status	<input type="text" value="complete"/>
Created At	5 Jul 2010		
Updated At	5 Jul 2010	Valid until	<input type="text" value="2010-08-04"/>
Customer	Zimmermann Olivier	Products Reception Date	<input type="text" value="2010-07-05"/>
Sales Order	100000004	Products Return Date	<input type="text"/>
Customer Phone	<input type="text" value="0000000"/>		
Customer Email	<input type="text" value="zimmermannolivier@gmail"/>		
Customer Address	<input type="text" value="Zimmermann Olivier 254 rue jean jaures Toulon, Var, 83000 France T: 0000000"/>		

Products

Product	Available Qty	Qty to return	Reason	Comments	Serials
Iphone	0	1	Rétractation	Réception mauvaise, même de la main droite .)	<input type="text"/>
HTC Hd2	1	2	Rétractation	<input type="text"/>	<input type="text"/>
Nokia 6230	1	<input type="text" value="0"/>	Rétractation	<input type="text"/>	<input type="text"/>

Comments

Private comments

Field	Comment
Reference	Unique reference
Created on	Creation date
Updated on	Last date the product return has been modified
Customer	You can reach customer sheet clicking on this link
Sales order	You can reach sales order sheet clicking on this link
Phone	Customer phone (can be different from the one stored in the sales order)
Email	Customer email
Address	Customer address
Status	Product return status
Valid until	Date until your customer can print product return form
Product reception date	Contains the date at which products have been received in your service
Return date	Contains the date when products are returned to customer (optional)

Products information

Field	Description
Qty	For each product, qty that is included in RMA.
Reason	Reason why the customer want to return product (reasons can be customized in system > configuration > Product return)
Comments	Customer comments
Serial numbers	Serial numbers for products

History

This tab summarizes product return history. An new entry is added when :

- Product return status change
- When an order or credit memo is created
- When customer is notified


Process product tab

In this tab, you can process products : notice that you can apply a different decision for each product

- Refund customer : in this case, a new credit memo is created
- Product exchange : Create a new sales order with the new product
- Return product to customer (if you checked product and this one works fine of if you repaired it). In this case, a new sales orer is created to be processed by you logistic service.

Product Return Edit Back Reset Print Delete Products received Save

Process products

	Reason	No action	Return product	Refund	Exchange	Product destination
1x HTC Hd2	Rétractation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/> HTC Hd2 	Back to stock <input type="button" value="v"/>
1x Nokia 6230	Rétractation	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Back to stock <input type="button" value="v"/>

Credit memo settings

Refund shipping fees

Order settings

Payment Method

Shipping Method

Shipping Cost

Technical Cost

Technical Cost Caption

Refund

If you wish to refund products, select "refund" radio button for products.

You can also refund shipping fees using checkbox "Refund shipping fees"

Once you set refunding settings, click on save button to create the new credit memo. You can then view credit memo from history tab

Exchange

If you wish to exchange product (with the same or another one), select "Exchange" radio button. If you want to exchange with another product, use the "list" button under the radio button : a new windows is opened and you can select substitution product. Once substitution product is selected, its name is displayed under the radio button.

Clicking on "Save" button, a new sales order is created for your logistic service to process shipment. However, you can control the new order information using "Order settings" block :

- Define payment and shipping methods
- Charge customer with shipping fees (excluding taxes)
- Charge customer for additional fees using fields "Technical costs" and "Technical costs caption"

Return products

If you only want to return products to customer, select "Return product" radio button. Returning products can be interested if you repaired it or if product works fine.

Clicking on "Save" button, a new sales order is created for your logistic service to process shipment. However, you can control the new order information using "Order settings" block :

- Define payment and shipping methods
- Charge customer with shipping fees (excluding taxes)
- Charge customer for additional fees using fields "Technical costs" and "Technical costs caption"

Stock management

Each time you select an action to process products, a new drop down menu is displayed in the last column. This drop down menu is used to define stock management rules for each product.

Notice that the action for stock management are different if you are using or not Embedded ERP :

Destnation	Standard	With Embedded ERP
Back to stock	Increase product stock	Create a new stock movement to increase stock
Back to supplier	No action	Not managed for the moment (planed for a future release)
Back to customer	Informative only	Informative only
Destroyed	No action	Not managed for the moment (planed for a future release)

Product Return Edit

Process products

	Reason	No action	Return product	Refund	Exchange	Product destination
1x Iphone	Rétractation	Refunded (Credit memo #100000001) - Back to stock				
2x HTC Hd2	Rétractation	Exchange (Commande #100000005 Exchanged with Nokia 6230) - Back to stock				

Credit memo settings

Refund shipping fees

Order settings

Payment Method

 Shipping Method

 Shipping Cost

 Technical Cost

 Technical Cost Caption

Physically process products

This part helps you to physically process products to return to stock, to return to supplier etc...

This feature is available under menu ERP > Product Return > Pending products

Pending products

Page of 1 pages | View per page | Total 2 records found

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions

Customer Return	Product	Qty	Reason	Received on	Destination	Comments
<input type="checkbox"/>	100000004-1	Iphone	1 Rétractation	Jul 5, 2010	Back to stock	Réception mauvaise, même de la main droite :)
<input type="checkbox"/>	100000004-1	HTC Hd2	2 Rétractation	Jul 5, 2010	Back to stock	

To inform system that you have processed product or to print actions to perform, you can select 3

actions from mass action menu :

- Print selected products
- Mark as processed : remove product from the list
- Print and Mark as processed : process twice actions

Customer account

In customer account, a new tab allow customer to view its product returns and request for a new one

New request

If you enabled product return request from customer (system > configuration > product return), customer can request for a new product return :

Product Returns				
Request a new Product Return				
Reference	Date	Order	Status	
100000004-1	Jul 5, 2010	100000004	complete	View

To create a new request, customer must click on "Create a new request" button and then select sales order that contains products to return

If customer is not authenticated, he is redirected to the login form.

Select Order for Product Return					
Order #	Date	Ship to	Order Total	Order Status	
100000004	6/8/10	Zimmermann Olivier	\$591.00	Complete	Select

Request Product Return for Order #100000004

Main Information

Phone

Email

Address

Reason

Products

Product	Qty	Comments
Iphone	<input type="text" value="0"/>	<input type="text"/>
HTC Hd2	<input type="text" value="1"/>	<input type="text" value="Screen broken"/>
Nokia 6230	<input type="text" value="0"/>	<input type="text"/>

Additional Comments

[« Retour](#)

When customer send its request, a new product return is created (with "new request" status) and an email is sent to the administrator. The new request is available from menu ERP > Product return > Customer return

Print product return form

Once product return is accepted by your service, customer can print product return form to ship its products. To print product form, customer must click on "Print product return form" from product return sheet, accept termes and conditions and then download PDF

Miscellaneous

Customize email templates

If you wish to customize email that are sent to customer, use menu System > Transactional emails

Template	Description
New product return	Mail sent to after sale service when a new product return request is submitted
Product return refused	Mail sent when product return is refused
Product return accepted	Mail sent when product return is accepted
Products received	Product has been received in after sale service
Products received but refused	Product has been received but refused because terms and conditions not respected
Product expertise	Product is being tested
Product return complete	Sent when product return is complete (when an action has been performed)