Magento Product Return User Manual Version 1.0

1. Overview	. 2
1.1 Extension overview	. 2
1.2 Processes	. 2
2. Integration	. 3
2.1 Module integration	. 3
2.2 Magento Upgrade	. 3
2.4 Settings	. 3
3. ProductReturn (rma)	. 5
3.1 Screens overview	5
3.1.1 Back office	5
3.1.2 Front office	6
3.3 Product return creation	. 7
3.3.1 Create a new product return	. 7
3.3.2 Access to Product Return	. 8
3.3.3 Edit Product Return	. 8
3.3.4 Printing & Customer notification 1	11
3.4 Customer Side 1	11
3.4.1 Product return list	11
3.4.2 Product Return Request1	12
4. Additional information 1	13
4.1 Edit Email Template1	13

Maison du Logiciel

1. Overview

1.1 Extension overview

Product Return extension for Magento is designed to manage Product return requests and ensure tracking.

Customer can submit a new request, follow Product return progress and print Product return form.

1.2 Processes



Regarding order cancel, process stops after products delivered : you can then create a credit memo to refund customer.

2. Integration

2.1 Module integration

This extension is compliant with Magento 1.3.2.4

To install extension, process the following steps:

Description	Source	Target
Code	App/code/local/MDN/ProductReturn	App/code/local/MDN
directory		
Design	App/Design/adminhtml/default/default/	App/Design/adminhtml/default/def
admin	layout/ProductReturn.xml	ault/layout
(layout)		
Design	App/Design/adminhtml/default/default/	App/Design/adminhtml/default/def
admin	template/ProductReturn	ault/template
(template)		
Design	App/Design/frontend/default/default/la	App/Design/frontend/default/defaul
frontend	yout/ ProductReturn.xml	t/layout
(layout)		
Design	App/Design/frontend/default/default/te	App/Design/frontend/default/defaul
frontend	mplate/ ProductReturn	t/template
(template)		
Declaration	App/ Etc/modules/MDN_	App/ Etc/modules/
file	ProductReturn.xml	
Translation	app/locale/fr_FR/ProductReturn.csv	app/locale/ fr_FR/
files		

Once all files are copied, go back into Magento back office, refresh cache from system > cache management.

2.2 Magento Upgrade

This extension follows Magento best practice, it means that it doesn't modify any core files so you can benefit and install Magento new releases. However, it's adviced to make some test on "test server" before install it on a production server.

2.4 Settings

Note : it is important to set Product Return parameters before using Product Return Extension.

You can edit Product Return settings from magento Back Office, menu system > configuration > Product return.

Settings :

- **Default validity duration** : set the default validity duration for a Product Return (in days)
- Allow Customer Product Return Request : If enabled, customer can request for product return from its account

Next, you have to set parameters for email. For each product return status matches an email template. You can edit email template from Magento backoffice, menu system > email template.

- **Email new request** : Each time a customer submit a product return request, an email is sent to this address
- **Copy to :** all emails sent from Product Return extension will be also sent to this address.
- **Email sender :** Identity to use for emails.
- **Template product return refused :** Email sent to customer if its Product return request is refused.
- **Template product return accepted :** Email sent to customer if its Product return request is accepted
- **Template products received:** Email sent to customer once its products have been delivered.
- **Template products received but refused:** Email sent to customer when products have been delivered but package is refused.
- **Template expertise products :** Email sent to customer when products are being verified by after sale service
- **Template Complete:** Email sent to customer when Product Return is complete.

Product Return Extension enable to create an order to process Product return result. This is usefull to manage Product Return in logistic process or bill fees to the customer.

Created order can contain products but also additional fees (such as technical fees). TO manage those fees, you have to create a "fake product" that will be used in that orders.

Create this fake product using this settings :

- Enabled
- Tax class: standard class
- Visibility : nowhere
- Price : 0
- Stock management : no
- Websites: all

Once this product is created, you have to fill its ID in fake product_id field in system > configuration > Product return

You can also define setting for PDF printing:

- Company address
- **PDF header text:** text displayed in the PDF header
- **PDF Footer text :** text displayed in the PDF footer.
- **PDF comments :** text displayed at the bottom of the PDF

When a Product Return is accepted, Customer has to print form and return products with this form. However, before printing form, he has to accept Product Return Commitments by checking a checkbox.

You can fill Product Return Terms and Commitments content from magento back office, in menu CMS > Static Block and then edit block with cgv_rma identifier.

3. ProductReturn (rma)

3.1 Screens overview

3.1.1 Back office

Product return Extension add 3 entries in Magento back office :

- The first entry is under Sales menu: it displays all product returns.

	Sales	Catalog	Custome
	Order P	reparation	rc
	Product	Returns	
ſ	Orders		u

- In customer edit sheet, a new tab contains all product return for this customer :

Customer Information	💣 Zimmermann olivier	Back
Customer View		
Product Returns	Personal Information	
Quotations Product R	eturns st Logged In:	Jan 5, 2010 9:40:01 PM (C
Account Information	Confirmed email:	Confirmed
Addresses	Account Created on:	Nov 6, 2009 8:42:18 AM
Orders	Account Created in:	Default Store View
	Customer Group:	Retailer

- In sales order sheet, a new tab contains all product return for the current order :

Order View	/ 🚽 Order # 1000000)4 Orde
Information		
Invoices	Order # 100000004 (Or	der confir
Credit Memos	Order Date	No
Shipments	Order Status	60
Comments History		
Preparation	Purchased From	Ma
Product Returns		De
Planning	Placed from IP	12
Organizer (0)		

3.1.2 Front office

In customer account, a new entry is added to list all customer's product returns :

MY ACCOUNT
Account Dashboard
Account Information
Address Book
My Orders
My Product Reviews
My Tags
Newsletter Subscriptions
My Wishlist
My Downloadable Products
Product Returns
My Quotations

Product Returns Request a new Product Ret				oduct Return
Reference	Date	Order	Status	
10000004-1	Jan 4, 2010	10000004	product return refused	View

From this area, customer can :

- Consult product returns list
- View product return details and print form
- Submit a new product return request

hone	0000			
mail	zimmermanno	olivier@gmail.com		
ddress	Zimmermann	olivier 1 des trois vi	lleurbanne, Rhône, 69100 France T: 0000	
Reason	cancel			
		Qty	Comments	
Product				
product produit 1		3		

3.3 Product return creation

3.3.1 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

3.3.2 Access to Product Return

There are 3 ways to access to an existing Product Return :

- Select matching sales order, select "Product return" tab and click on the product return
- Use search form from menu sales > Product Return
- Select matching customer, select "Product return" tab and click on the product return.

3.3.3 Edit Product Return

From the Product Return sheet, you can set the following information :

General	
Reference	10000004-1
Created At	Jan 5, 2010
Updated At	Jan 5, 2010
Customer	Zimmermann olivier
Sales Order	<u>10000004</u>
Customer Phone	0000
Customer Email	zimmermannolivier@gmail
Customer Address	Zimmermann olivier 1 des trois villeurbanne, Rhône, 69100 France T: 0000 💌
Status	product return refused
Reason	cancel 💌
Valid until	2010-02-03
Products Reception Date	
Products Return Date	

Field	Description
Reference	Unique identifier
Created at	Creation date (automatically filled)
Updated At	Update date (automatically filled)
Customer	Customer identity
Sales order	Sales order concerned
Customer phone	
Customer email	Customer email : can be changed
Customer address	Customer address (if you wish to use another one, you have to
	create it in customer sheet)
Status	- Requested : New customer request

	- Product return accepted : customer can return product.
	- Product Return refused : customer can not return product
	- Product received : Product has been received.
	- Product received but refused : Product has been received
	but package doesn't match to product return terms and conditions
	- Product expertise : Product is being tested
	- Complete
Reason	Define product return reason :
	- Cancel : customer wishes to cancel its order.
	- Defect : if product return concerns product that doesn't
	work properly
Valid until	Date until customer can print and return products.
Product reception date	
Product return date	

Products					
Product	Qty Shipped	Qty to return	Comments		
produit 1	3	3		infrared receiver doesn't work	
					/_

Field	Description
Product	Product name
Qty shipped	
Qty to return	Qty to return, can not be greater than qty shipped
Comments	Comments that can be edited by customer to give more information
	about the problem.

Comments	
Customer Description	Product doesn't work properly, especially infrared receiver which has never work since i received it
Private comments	Very special customer, handle with care
Public Comments	

	Field	Description
--	-------	-------------

Customer description	General description filled by customer
Private comments	Private comments, not visible by customer
Public comments	Comments that can be edit by administrator and visible for customer.

Once all product return steps are done, you can finalize product return performing an action to return product, repaired product or a new one.

Product return extension allow to automatically create a new order : this is usefull to process return using Embbeded ERP extension or to bill fees to customer.

To create an action, use the form at the bottom of the product return sheet :

Action	
Perform an action	
Action	•
Shipping Method	
Shipping Cost	
Technical Cost	
Technical Cost Caption	
Payment Method	•

Field	Description	
Perform an action	To perform action and display form, check this checkbox	
Action	 Product Return : return product to customer (if product works properly or has been repaired). Exchange : Exchange product with another one. Refund : refund customer for selected products. 	
Shipping Method	Shipping method to use to create order	
Shipping Costs	Shipping costs (without vat)	
Technical costs	Technical costs billed to customer (can be null)	
Technical costs	Caption that describes technical costs. For example :	
caption	- Reparing fees	
	- Management fees	
Payment method	Payment method to use to create order	
Refund Shipping fees	If checked, shipping cost will be refunded within creditmemo	
Back products to stock	If checked, products will back to stock	



To save data, use "save button" at the top of the screen. If an action has been selected, a new order is created and is displayed instead of the action form :



3.3.4 Printing & Customer notification

To print a product return form, use "print" button

To notify customer about Product return status, use "notify customer" button.

You can customize email from menu System > Transactional email

3.4 Customer Side

3.4.1 Product return list

Customer can view product return list from it's account, menu "Product return" :

MY AC	COUNT
Accour	it Dashboard
Accour	it Information
Addres	s Book
My Ord	ers
My Pro	duct Reviews
My Tag	s
Newsl	etter Subscriptions
My Wis	hlist
My Dov	vnloadable Products
Produc	ct Returns
My Quo	otations

To view product return information, use "view" link

Product Return #10000004-1

Main Information			
Phone	0000		
Email	zimmermann	olivier@gmail.com	
Address	Zimmermann	olivier 1 des trois villeu	irbanne, Rhône, 69100 France T: 0000
Reason	cancel		
Product		Qty	Comments
Product		Otv	Comments
produit 1		3	
Additional Comm	ents		
Additional Comm	ents		

From this screen, if product return status is "accepted", customer can print form and accept product return terms and conditions.

3.4.2 Product Return Request

If you enabled product return request for customer (can be set in system > configuration > product return), customer can request for a new product return from their account, in product return tab.

First, customer has to select sales order that contains product to return :

Select Order for Product Return					
Order #	Date	Ship to	Order Total	Order Status	
10000002	11/6/09	Zimmermann olivier	\$18.00	Complete	Select
10000003	11/6/09	Zimmermann olivier	\$15.00	Complete	Select
10000004	11/6/09	Zimmermann olivier	\$45.00	Complete	Select
10000005	11/6/09	Zimmermann olivier	\$315.00	Complete	Select

Then, customer can fill information about product return :

Request Product Return for Order #10000004

Phone 0000 Email zimmermannolivier@gmail Address Zimmermann olivier 1 des trois villeurbanne. Rhône, 69100 France T: 0000 💌		
Reason Cancel Products		
Product	Qty	Comments
	0 🗸	
produit 1		

Once customer submit request, a new product return is created (with "requested" status) and an email is sent to the after sale service to notify this new request.

4. Additional information

4.1 Edit Email Template

You can customize email sent by product return extension from menu system > transactional emails

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