

RMA - Magento 2

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Migrating RMA from Magento 1 to Magento 2

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FireFox user notice:

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Sorry for the inconvenience.



Magento 2 RMA completely arranges the return merchandise process in web stores. Customers can create return requests and monitor them from their accounts. Store admins can arrange requests from the backend by adding custom fields to an RMA request

form, communicating with customers in the dedicated chat area, and sending email alerts and custom canned responses while requests are processed.

Compatibility: Magento Open Source 2.2.X,
Magento Commerce 2.2.X

[Product Page](#)

Thank you for choosing Aheadworks!

Installing RMA

Step 1 (Magento 2 Community and Enterprise)

Command Line Installation

1. Backup your web directory and store database

2. Download the RMA installation package

3. Upload the contents of the RMA installation package to your store root directory

4. In the SSH console of your server, navigate to your store root folder:

```
cd  
path_to_the_store_root_  
folder
```

run the following command:

```
php -f bin/magento  
module:enable  
Aheadworks_Rma
```

and then:

```
php -f bin/magento  
setup:upgrade
```

after:

```
php -f bin/magento  
setup:static-content:de  
ploy
```

5. Flush the store cache; log out from the backend and log in again



Make sure the installation is done from under the FTP administrator account. Otherwise, make sure to set 775 permissions to the store

root directory after the extension is deployed.

Composer Installation

1. Log in to your customer account at <https://ecommerce.aheworks.com> and navigate to Account -> Composer access;

2. Configure your store to work with the Aheadworks composer repository:

Add composer repository to composer.json by running:

```
composer config repositories.aheworkscomposer https://dist.aheworks.com/
```

 in the Magento installation root.

Use the provided key pair as a login and pass. You can optionally save them in the global composer auth file.

3. You can start using AW composer now.

For extension names, navigate to Account -> Composer access.

4. Open the root Magento directory on your server and send Composer the following command:

```
composer require <component-name>:<version>
```

Note: Use the previously copied component's name and version.

5. Make sure that Composer finished the installation without errors. Flush the store cache, log out and log into the backend again.


Step 2 (Magento 2 Enterprise only)

Disable the native Magento 2 RMA functionality to avoid any conflicts:

1. Navigate to Stores > Configuration > Advanced > Advanced;
2. Disable `Magento_Rma`.

Migrating RMA from Magento 1 to Magento 2

What should I know before migrating the Aheadworks RMA for M1 to RMA for M2?

 Consider the following information as a top priority, otherwise the migration might result in an accidental data loss.

1. The [Magento Data Migration Tool](#) is required to be installed prior to starting the migration.
The migration script relies heavily on the Magento Data Migration tool. Understanding how it works will be useful during the migration process.
2. Backup the Magento 2 databases before performing the migration.
This way, you will be able to revert any changes.
RMA migration might involve rewriting database tables, backup is advised.
3. All files attached to RMA requests should be migrated manually
More information on manual migration can be found in the [Magento instructions on manual migration](#).

Video Guide

A similar migration process is described in the educational [Video Guide](#) on the [Aheadworks Youtube channel](#). Don't forget to enable subtitles for the video to follow the data migration process.

Migration Process

Below you can see the migration guide with more detailed step-by-step description.

1. Log into your Magento server as a file owner and navigate to the directory where you have your Magento 2 store installed

▼ [Click to view details](#)

For example:

```
cd
/var/www/my_magento2_
store/
```

2. Install the **Magento Data Migration Tool**

▼ [Click to view details](#)

The installation instructions for the Magento Data Migration Tool along with the basic information can be found here: <http://devdocs.magento.com/guides/v2.0/migration/migration-tool-install.html>

Magento provides the two ways of installing the Data Migration Tool:

- [Installing the tool from GitHub](#)
- [Installing the tool from repo.magento.com](#)

To make sure that the Migration Tool was installed successfully, navigate to `vendor/magento/`.

3. Download the RMA migration distributive and unpack it to the desired location

▼ [Click to view details](#)

The RMA migration distributive can be downloaded from here: http://s3.amazonaws.com/aheadworks_cdn/catalog/rma-data-migration-tool.zip

Unpack the contents of the distributive and find the `/etc` and `/scr` folders inside.

4. Copy the contents of the RMA migration distributive to the Magento Data Migration Tool's main folder

▼ [Click to view details](#)

Copy the `/etc` and `/scr` folders included in the RMA migration package to `vendor/magento/data-migration-tool/`.

Rewrite on prompt.

5. Edit the config.xml file in the Magento Data Migration Tool

▼ [Click to view details](#)

Navigate to `vendor/magento/data-migration-tool/etc/aw_rma/` and open `config.xml` for edit. For more information about tag values, read the [Magento Data Migration Tool configuration instructions](#).



Pay a close attention to the `<aw_rma_remove_requests_before_migration>` tag value you are entering if you already have RMA requests in your Magento 2 store and want to keep them intact. The '1' value set by default will remove all the existing Magento 2 RMA requests. The '0' value will add new RMA requests to the already existing ones.

6. Run the migration script in the console

▼ [Click to view details](#)

To start the migration process, run the following command considering the path to `config.xml` :

```
bin/magento
migrate:data
[-r|--reset] {<path
to config.xml>}
```

You can also use the following command considering the path to `config.xml`:

```
bin/magento
migrate:data -r
vendor/magento/data-m
igration-tool/etc/aw_
rma/config.xml
```

7. Data migration is complete. Make sure to manually migrate the attached files and images.

- Copy all files to the `m1store_root/media/aw_rma` folder;
- Move the copied files to the `m2store_root/pub/media/aw_rma/media` folder.

Describing the Migration Process

The migration process consists of the two stages.

Stage 1. Synchronization

First, 'Fields' (RMA request options) in the Magento 1 RMA extension (hereinafter M1 RMA) and 'Custom Fields' in the Magento 2 RMA extension (hereinafter M2 RMA) are synchronized.

Field conformance looks in the following way:

- Request type -> Resolution;
- Package Opened -> Package Condition;
- Reason -> Reason.

Conformance Logic

The M1 RMA 'Fields' values are compared by their names with the corresponding M2 RMA 'Custom Fields' values. In case of an exact match, the value is transferred directly to Magento 2. If the names do not match, the tool adds a new option to M2 RMA.



Example

For example, if one of the names of the M1 RMA 'Request type' values does not match any title of the M2 RMA 'Resolution' custom fields, a new option will be added to the M2 RMA 'Resolution' custom field.

The same procedure is applied to all field values of M1 RMA. To avoid additional negative effects, we recommend you to migrate to a 'clean', non-customized RMA extension for Magento 2 in order to minimize the number of mismatches.

Stage 2. Migration

Request data is transferred with the preservation of the order_id, customer_id, product_id, and store_id fields. Therefore, it is important for all orders, products, customers, and stores to match each other.



Example

For example, if the M1 product with ID 5 has product_name1, and the same product with ID 5 on M2 has other product_name2, then after the migration, you will see data discrepancy (the same applies to customers and stores).



Note

Note: Ideally, you should migrate all your data to Magento 2 first and only then migrate the RMA requests.

When you transfer request statuses, the following conformance pattern is used:

- M1 Pending Approval -> M2 Pending Approval
- M1 Approved -> M2 Approved
- M1 Package sent -> M2 Package sent
- M1 Resolved (canceled) -> M2 Canceled
- M1 Resolved (refunded) -> M2 Issue Refund
- M1 (any other status) -> M2 Closed



Note

Note: The migration configuration file data-migration-tool/etc/aw_rma/config.xml contains the aw_rma_remove_requests_before_migration option, which is enabled by default. This option clears all Magento 2 RMA requests created before the migration procedure itself. If necessary, you can disable the option and add the new migration data to the existing Magento 2 RMA requests.

Introducing RMA

The Magento 2 RMA extension handles all the key aspects of return merchandise management:

- RMA request creation & monitoring in both the frontend and backend;
- Custom RMA fields for the RMA request form;
- Per-item control (for multi-product returns);
- Message thread with file attachments and admin notes;
- Email alerts configured individually per RMA status;
- Configurable canned responses.

Extension Logic

In the backend, the module generally consists of 4 grids and the configuration page. Store admins can create/monitor return requests, configure email alerts along with canned responses, exchange messages with customers in the dedicated thread (and optionally leave internal notes not visible to requesters and attach files to the thread), and add custom fields to the request form. On the storefront, customers can monitor their requests from the separate section, create new requests as well as use the same message thread functionality as in the admin area.

Getting Around

The Magento 2 RMA extension comes ready for work right after installation. Once installed, it introduces the 'My Returns' section to a customer account page and the 'Create New Return' link to the store footer. By following both of the links, you can create a new RMA request.

Return #	Order #	Product(s)	Status	Updated At	Created At	
000000038	000000092	Sprite Foam Roller	Closed	2/12/19	2/12/19	View Request
000000034	000000091	Typhon Performance Fleece-lined Jacket-M-Green	Pending Approval	2/12/19	2/12/19	View Request

Along with the 'My Returns' section and the 'Create New Return' link, customers can request a return from the order view page in the 'My Orders' account section. To do this, they should click on the 'Request Return' active link on the order details page.



Thanks to the RMA extension, you can allow your guest customers to ask for the return.

To create a return request, a guest customer should click on the 'Create New Return' active link in the store main page's footer.

Here the module adds the 'Guest Order' section where the guest should specify their email address used to place the order and the order number.

Guest Order

If you have placed order as guest user, please enter Order Number and Email which has been used for the order.

Order Number: *



Email: *

Next

Create New Return

Now, let's request the return from the 'My Returns' section. To do this, click

On the 'Select order to create RMA' screen, choose the order that you want to return.



<input checked="" type="radio"/>	Order #000000032	Nov 1, 2017	Complete	\$75.40	Next
			Ordered 1 Invoiced 1 Shipped 0 Refunded 0	1 available	
			Ordered 1 Invoiced 1 Shipped 0 Refunded 0	1 available	
	Radiant Tee-M-Orange				
	Apollo Running Short-33-Black				


Next, select the item(s) you want to return and specify the item quantity (if you need to return several items). Choose the Resolution for the return and Packag

e Condition. Those are the custom fields that come with the RMA extension by default.

Products to Return:

[Select All](#) | [Deselect All](#)

<input checked="" type="checkbox"/>	 Radiant Tee- M-Orange \$22.00	<p>Reason * <input type="text" value="Wrong size"/></p> <p>Multiselect filed (for product) * <input type="text" value="Multiselect filed with first v"/> <input type="text" value="Multiselect filed with se"/> <input type="text" value="Multiselect filed with third v"/></p>
<input type="checkbox"/>	 Apollo Running Short-33-Black \$32.50	<p>Tick checkbox to select.</p>

 You can add other custom fields or edit the existing ones in the corresponding backend section.

Once done, click [Next](#) to proceed to the next step.

When the items are selected and custom fields are filled in, you can add a message to your request. The message will be emailed to an admin.

Message

Type here to add a message to manager



Update Request

Confirm Shipping and Update Request

John Doe (me), Nov 1, 2017, 3:47:53 AM

Test

(Customer Service), Nov 1, 2017, 3:47:50 AM

The request has been approved.



Both customer and admin messages are combined in a thread that can be found under the corresponding RMA request.

admin admin (Customer Service), Dec 15, 2015, 7:41:23 AM

Hi, John, I'am here to confirm that we have received a package. Everything is fine. You can expect a refund in a couple of days. Thank you.

John Doe (me), Dec 15, 2015, 7:39:59 AM

Done. I have sent the package back to you guys!

[at-package.png](#) (27.46kb)

admin admin (Customer Service), Dec 15, 2015, 7:37:39 AM

Hi, John, Of course, you can count on us. Please print the shipping label by clicking 'Print Label' button from your RMA screen and attach it to the package you are sending back to us. When the package is sent please confirm it by clicking 'Confirm Shipping' button. Once we receive the package you can expect a full refund. Thank you.

John Doe (me), Dec 15, 2015, 7:22:21 AM

hi, guys, Sorry to say, I have to ask for a refund. The hoodies ordered were a size bigger than I expected. I would like to ask for a full refund. You can expect me to get back to your store, the hoodies were of amazing quality. Looking forward to hear from you soon! Regards, John

[Submit Request](#)

Once done, click [Submit Request](#) . The request is submitted.

All the request-related information along with the message thread can be found in the 'My Returns' section.

Backend Configuration

Manage RMA

'Manage RMA' is the main section of the extension.

Manage RMA

Manage RMA admin

[New Request](#)

Filters | Default View | Columns

Actions 41 records found | 50 per page | 1 of 1

<input type="checkbox"/>	Request #	Order # ↑	Customer	Product(s)	Last Reply by	Status	Package condition	Return shipping options
<input type="checkbox"/>	000000036	000000104	Christoffer Iversen, christofferiv79@yahoo.com	Didi Sport Watch, Echo Fit Compression Short-28-Purple		Approved	Opened	Send me a UPS shipping label
<input type="checkbox"/>	000000039	000000103	Claire Kingsford, princessclaire98@gmail.com	Affirm Water Bottle , Sprite Yoga Strap 6 foot		Package Received	Opened	Send me a UPS shipping label
<input type="checkbox"/>	000000041	000000102	Julien Simon, simonjul12@gmail.com	Strive Shoulder Pack		Issue Refund	Damaged	Send me a UPS shipping label
<input type="checkbox"/>	000000042	000000101	Spencer Crist, silverspencer@yahoo.com	Primo Endurance Tank-M-Red		Issue Refund	Opened	I'll arrange shipping myself
<input type="checkbox"/>	000000040	000000100	Spencer Crist, silverspencer@yahoo.com	Aim Analog Watch		Closed	Opened	Send me a UPS shipping label

Here you can manage all the RMA requests submitted by you and your customers. With the 'Actions' box above the grid, you can change the request status individually or massively to:

- Approved;
- Canceled;
- Closed;
- Issue refund;
- Package received;
- Package sent;
- Pending approval.

Creating RMA Requests from the Backend

To create a new return request, click [New Request](#) above the grid.

New request

← Back Reset **Save**

General Information

Order #000000003

Resolution *

Package Condition *

Products

< 1 of 1 >

Product Title	SKU	Product Price	Qty to Return	Qty in Stock	Total Paid	Reason *	Actions
Sprite Foam Roller	24-WG088	\$19.00	<input type="text" value="1"/>	97	\$19.00	<input type="text" value="Please select"/>	Remove
Montana Wind Jacket-XS-Black	MJ03-XS-Black	\$49.00	<input type="text" value="1"/>	99	\$49.00	<input type="text" value="Please select"/>	Remove

Customer Information

Customer Name

Customer Email

Shipping Information

Rma History

Reply Internal Note

Upload

The 'New Request' page consists of several sections:

- General Information. With these options, you can select the order the request relates to. Next, you should select the Resolution you want to apply and Package condition reported by a customer if you use the above custom fields for your request forms.

i Note: You can create RMA requests for completed orders only.

- Products. Products included in the order. From the 'Products' grid, you can amend the number of returned items and the reason to send them back individually for each item. You can also remove certain products from the grid if you don't want them to be included in the request.
- Customer Information. The information about the customer is automatically taken from the order.
- RMA History. Here you can exchange messages with the customer and attach files if necessary.

Messaging is possible in several ways.

1. You can write an individual notification for the customer by specifying the message in the text area and clicking **Reply** above the area;
2. You can leave an internal note for other admins. For this purpose, click **Internal Note**. The whole text area below will turn yellow to make you sure that the message is for internal use only;
3. Finally, you can select a canned response to be sent to the customer in response to their particular actions.

i Canned responses are customizable values. Configure them from the 'Canned Responses' page.

In addition to messages, you can also attach files to the newly created request.

As soon as the new RMA request is created, you can manage it the same way as the requests created by customers.

Managing RMA Requests

Click the Request's id (all id's are presented as active links in the 'Request #' column) to proceed to the 'Manage Request' page. The page looks almost the same way as the 'New Request' page. The only difference is that the 'Status' and 'Last Update date' parameters are presented there.

On this page, you can close, cancel, and approve the requests pending an approval.

Approving a Request

Approve the request by clicking [Approve](#).

Now the email notifying the customer about the new reply and request status update will be sent.

Customers will now have the option to print shipping labels (to be included in the RMA package) and confirm that the package has been sent back to your store.

RMA #000000001

Date: 12/15/15

Return address	Details
John Doe Sample St Sample City, Alabama, 12345 United States 123456789	Order ID: #000000002 Resolution: Refund Package Condition: Opened

Items RMA requested for

Product Name	SKU	Qty
Hero Hoodie	MH07-L-Green	1
Hero Hoodie-L-Green	MH07-L-Green	1

Confirming Package Receiving

After the request has been approved, and the customer has confirmed that the package had been sent back to your store, you will need to confirm the receipt.

Do this by clicking [Confirm Packadge Receiving](#).

Creating a Replacement Order

As soon as the 'Package Received' status is applied, you can create a replacement order for the requests requiring a replacement.

Issuing a Refund

For the requests requiring a refund, you can create a credit memo right from the 'Manage Request' page.

Closing a Request

Finally, you can close the request as soon as the item is replaced or refunded.

That's it. The RMA request is successfully resolved. Let's proceed to the RMA extension's settings.



The Magento 2 RMA extension doesn't offer any refunding or postal services. Refunds are processed manually by any means necessary.

Statuses and Email Templates

As it was previously mentioned, the RMA extension comes set up and ready for work right after the installation. If required, you can always adjust RMA request statuses and edit the notification emails.

<input type="checkbox"/>	ID	Name	Email to Customer	Email to Admin	Message to Request Thread
<input type="checkbox"/>	1	Approved	Yes	No	Yes
<input type="checkbox"/>	2	Canceled	Yes	No	Yes
<input type="checkbox"/>	3	Closed	Yes	No	Yes
<input type="checkbox"/>	4	Issue Refund	No	Yes	Yes
<input type="checkbox"/>	5	Package Received	Yes	No	Yes
<input type="checkbox"/>	6	Package Sent	Yes	Yes	Yes
<input type="checkbox"/>	7	Pending Approval	Yes	No	Yes

Statuses

There are 7 RMA request statuses, each defining a particular stage of the RMA process.

Status	Event
Pending Approval	Assigned to the new return request automatically
Approved	Assigned upon the request's approval
Package Sent	Assigned by the customer confirming package sending
Package Received	Assigned upon package receipt confirmation
Issue Refund	Assigned upon issuing a refund
Closed	Assigned upon closing a request either by you or customer
Canceled	Assigned upon the request's cancellation

Email Templates

Depending on the request's type, it is also possible to send an email notification to the customer, store administrator, or both.

Along with defining templates for email notifications, you can edit the request thread's message to be displayed upon the request obtaining a particular status.

Custom Fields

As we already described in the [Getting Around](#) section, when submitting the request, you are suggested to fill in the Resolution, Package Condition, and Reason sections to ask for the return.

All those are the predefined custom fields that come with the RMA extension by default. They can be edited in the 'Custom Fields' section.

<input type="checkbox"/>	ID	Name	Field Type	Refers To	Websites
<input type="checkbox"/>	1	Resolution	Dropdown	Request	Main Website
<input type="checkbox"/>	2	Package condition	Dropdown	Request	Main Website
<input type="checkbox"/>	3	Reason for return	Dropdown	Product	Main Website
<input type="checkbox"/>	8	Missing items	Text Field	Product	Main Website
<input type="checkbox"/>	10	Return shipping options	Dropdown	Request	Main Website

Along with editing custom fields, you can also create the additional ones depending on the products or services you are offering.

To create a new custom field, click [Add Custom Field](#) :


- Define the name (for internal identification purposes) of the custom field and the field type: text field, text area, dropdown, multi-select;
- Decide if the custom field should refer to the RMA request on the whole or to the item(s) previously ordered;
- Set the return status upon which you and your customers can edit/view the field;
- If necessary, make the field required (customers will not be able to submit the request without filling this field);
- Add the custom field to the shipping label (this might help to identify the parcel);
- Choose the website the custom field should be displayed at.
- Adjust the field's frontend label (the title that will be displayed to customers).
- Add options (attribute values available for the 'Dropdown' and 'Multiselect' field types) if you want the customer to select from the predefined set of attributes.

Once done with the new field, click [Save](#) .

The custom field is created. It can be found in the previously set area of the RMA request page.

Canned Responses

Canned Responses

Search by keyword  Filters Default View Columns

Add Canned Response

Actions 2 records found 20 per page 1 of 1

<input type="checkbox"/>	ID ↓	Title	Status	Created	Modified	Action
<input type="checkbox"/>	1	Canned response 1	Enabled	May 4, 2018 2:17:52 PM	May 4, 2018 2:17:52 PM	Select
<input type="checkbox"/>	2	Canned response 2	Enabled	May 7, 2018 9:59:43 AM	May 7, 2018 9:59:43 AM	Select


From the 'Canned Responses' grid, you can create fast responses that can be used for status updates and other simple messages sent to customers. You can manage the existing responses either individually or massively and create new canned responses.

With the 'Select' box in the 'Action' column, you can edit or delete the selected responses, while the 'Actions' box above the grid makes it possible to change the status or delete the selected response(s).

Creating a New Canned Response

Add Canned Response

To add a new canned response, click **Add Canned Response** above the grid. On the following page, you can enable the response, provide its title, select the appropriate store view and specify its content.

 Note: Only enabled canned responses can be used for answers.

Order Page Improvements

Returns Section

#000000091 🔍 admin ▾

← Back Send Email Credit Memo Reorder

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Returns
- Comments History

Filters Columns ▾

1 records found 20 per page 1 of 1

	Request #	Order #	Customer	Product(s)	Last Reply by	Status	Store	Updated At	Created At
<input type="checkbox"/>	000000034	000000091	George Groom, groom29@gmail.com	Typhon Performance Fleece-lined Jacket- M-Green		Pending Approval	Main Website US Store US Store View	Feb 12, 2019 6:24:07 AM	Feb 12, 2019 6:24:07 AM

If you want to see all return requests created for a particular order, you can do this right from the order view page. The 'Returns' section enumerates all the created requests in the dedicated grid. In order to manage a certain request, you need to click the active link with the ID of the request in the 'Request #' column.

New Return

With above the grid, you can create return requests on the spot.

Extension Settings

General

In the 'General' setting section, you can adjust the basic extension parameters:

- Return Period - defines how many days after placing the order the customer can ask for the return;
- Allow guests to request RMA - defines if guest customers can ask for the refund (email and order ID are required);
- "Confirm Shipping" alert text - edits the 'Confirm Shipping' pop-up notification;
- Approve New Requests Automatically - defines if the incoming return requests should be approved automatically.

General ⊞

Return Period (store view)
Allow to request RMA after order completion, days

Allow guests to request RMA (store view) Yes

"Confirm Shipping" alert text (store view) Having clicked "Yes", you won't be able to cancel RMA or make any changes to it. Please ensure that:
1. You have included the RMA Label inside the package.

Approve New Requests Automatically (store view) Yes

RMA Text Blocks and Policy

This setting section displays CMS blocks at the specific RMA request steps.

Every field represents the corresponding step with the box of all CMS blocks available in the store.

▾ [Product selection page block position...](#)

▾ [Reasons and details page block position...](#)

New Return

Product selection block

aheadWorks®

Select order to create RMA

Order	Order Date
<input type="radio"/> Order #000000008	Dec 15, 2015
<input type="radio"/> Order #000000007	Dec 15, 2015

New Return

Reasons and deta

aheadW

[Back](#)

Please select Res

- Refund
- Replaceme

Please select Pac

- Opened
- Not opener
- Damaged

▼ Policy block position...

This is not actually a block position, rather, this is a link available for the customer when accepting the Return Policy regulations.

I accept [Return Policy regulations](#)

RMA text blocks and Policy ⌵

Guest RMA page block [store view] ▼

Product selection page block [store view] ▼

Reasons and details page block [store view] ▼

Policy Block [store view] ▼

Contacts ⌵

RMA Department display name [store view]

RMA Department email [store view]

RMA Department address [store view]

Email Notifications ⌵

Reply by Admin [store view] ▼

Reply by Customer [store view] ▼

File Attachments ⌵

Allow Customer to Attach Files [store view] ▼

Max Upload File Size (Mb) [store view]

Allow File Extensions [store view]

Contacts

This setting section defines your RMA department's credentials such as the name displayed, email, and address.

Email Notifications


This setting section defines email notification templates about the new reply by the store administrator to the customer's request (Reply by Admin) and the new reply by the customer to the request (Reply by Customer).

File Attachments

This setting section makes it possible for customers to attach files to their return requests. Here you can also specify the maximum size of the uploaded files in megabytes and available file extensions.

Need Customization?

Need additional functionality
or further customization of your products?



[Request a free quote](#)

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