

X-RMA module

for X-Cart 4.0.0

Reference Manual

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General Information



X-RMA module is an optional add-on for X-Cart shopping cart software. Designed for your customers' convenience, this module is a powerful means to automate product returns process.

X-RMA (Return Merchandise Authorization) module is created to facilitate the procedure of returning the products, which may be very annoying if you do not have a tool to deal with it.

X-RMA organizes the process and prevents both you and your customers from negative experience and endless email correspondence.

X-RMA enables convenient and quick product return procedure management.

The key features of this module include:

- Individual return period for each product
- Automatic generation of a Return Slip
- Option to issue a credit for future purchases
- Configurable Return reasons
- Email notifications about return authorization

X-RMA is a reliable and up-to-date solution that makes your business competitive.

You can purchase it at www.x-cart.com.

Installation

System requirements

For successful installation and work of the module you need an already installed X-Cart GOLD or PRO 4.0.0 or later.

Module installation

To install the module you have to perform the following actions:

1. Download the module distributive (x-rma-x.y.z.tgz, where x,y,z are the numbers of the module version) from File area/Software distributives
2. Uncompress the x-rma-x.y.z.tgz file and copy the files to X-Cart directory.
3. Run in the browser the installation script http://www.yourhost.com/xcart_dir/install-xrma.php
4. Enter your authentication code, accept the conditions of the License Agreement and press “Next” button.

Note. The authentication code is issued on completion of X-Cart installation. It is used to prevent unauthorized re-installation of X-Cart and to install X-Cart modules (if you decide to purchase them). If you forget the code, you can look it up at any time in include/install.php file.

5. Installation script will copy the files and make all the necessary changes in the database.
6. After Module Installation is completed you need to log in as admin and setup the module:
 - enable *RMA* from the *Modules* section.

X-Cart Gold and Pro module installations do not differ.

Using RMA module

Admin zone

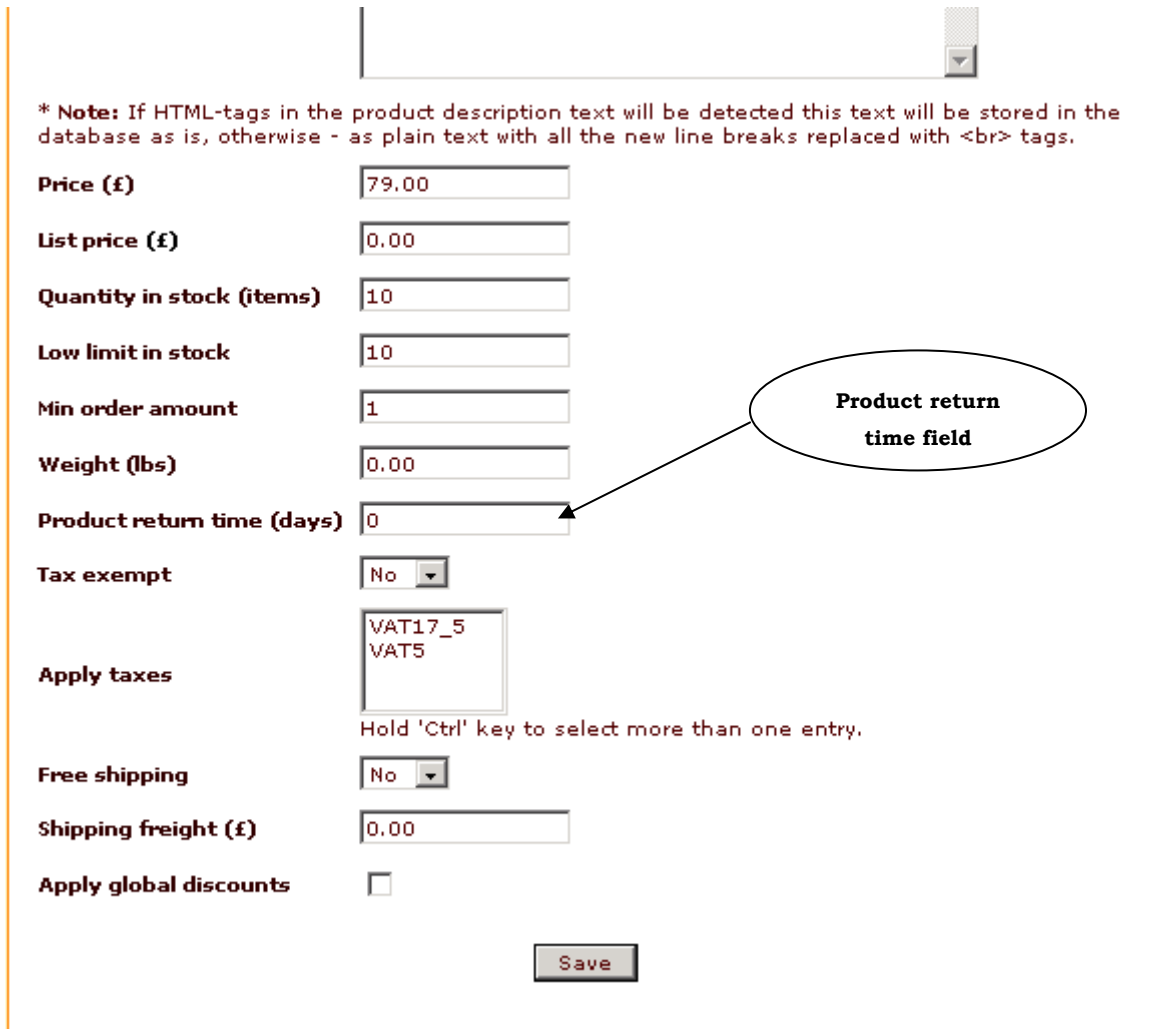
Setting product return time

The store admin decides what products can be returned by customers and sets the time during which a customer is allowed to return a purchased product.

To set the product return time:

1. Use the **Search** form on the *Product management* page to find a product you want to set the return time for.
2. Go to the **Product details** page.
3. Use **Product return time** field to set up the time period (days), within which a customer can return the product with the comments indicating the reason for returning. If you set the return time of some product to 0 (zero), your customers will not be able to return this product.

Picture 1: Setting the product return time



* **Note:** If HTML-tags in the product description text will be detected this text will be stored in the database as is, otherwise - as plain text with all the new line breaks replaced with
 tags.

Price (£)	<input type="text" value="79.00"/>
List price (£)	<input type="text" value="0.00"/>
Quantity in stock (items)	<input type="text" value="10"/>
Low limit in stock	<input type="text" value="10"/>
Min order amount	<input type="text" value="1"/>
Weight (lbs)	<input type="text" value="0.00"/>
Product return time (days)	<input type="text" value="0"/>
Tax exempt	<input type="text" value="No"/>
Apply taxes	<input type="text" value="VAT17_5
VAT5"/>
	Hold 'Ctrl' key to select more than one entry.
Free shipping	<input type="text" value="No"/>
Shipping freight (£)	<input type="text" value="0.00"/>
Apply global discounts	<input type="checkbox"/>

Product return time field

4. Click on **Save** to apply the changes.

Managing return requests

Once RMA module is enabled, the **Returns** link appears in the Management menu. By clicking on **Returns** you access the admin zone *Returns* section. You can use the *Search* form located here to search for return requests placed by your customers.

Picture 2: Return request search form.

Select the necessary period and click on **Search**. The *Return ID* and *Statuses* fields help you to find the necessary return request quicker.

The *Returns list* will be displayed, where you can modify/delete/update the existing return requests.

Picture 3: Returns list.

RETURNID	CUSTOMER	PRODUCT	ORDER	DATE	STATUS	CREDIT STATUS
RMA#4	Jill Backer	Indesit W103Washing Machine (a)	3009	Aug 2, 2004	Return requested	Creation of credit forbidden

The operations below are for the first selected item only:

The **STATUS** column displays the current status of the return requests.

When a new request is placed by a customer, it gets the status *Return requested*. The admin is supposed to process the request by updating its status.

To update the return request status:

1. In the *Returns list* locate the return request, the status of which you want to update.
2. Select the appropriate status from the **Status** select box:
 - Return authorized*
 - Return declined*

Return completed

Removed by customer

3. Click on **Update**.

Note. If a return request is deleted by the customer, *Removed by customer* status is set to this return request automatically.

Sometimes it may be necessary to modify the details of an already placed request.

To modify an existing return request:

1. Do one of the following:
 - Select the check box next to the return request you would like to modify and click on **Modify**.
 - Click on the return ID link of the request you would like to modify.

The return *Modify* form opens.

Picture 4: *Modify form.*

The screenshot shows a web form titled "Modify" with an orange header. In the top right corner, there is a link "Returns list" followed by a "Go" button. The form contains the following fields:

- Reason for returning:** A dropdown menu with "Wrong item ordered" selected.
- What you would like us to do:** A dropdown menu with "Send replacement if within warranty" selected.
- Comment:** A text input field.
- Status:** A dropdown menu with "Return requested" selected.

Below the "Status" field is a "Modify" button.

2. Change the reason and/or action, selected by the customer, or edit the text in the **Comment** field, if necessary.
3. Select the return status from the **Status** drop-down list.
4. Click on **Modify** to save the changes.

You can use the **Returns list** link to go back to the returns management page.

When the admin changes the status of a return request to *Return authorized* or *Return completed*, the **Create** link appears in the **CREDIT STATUS** column of this return request.

Picture 5: Creation of credit is allowed for the return RMA#3 after its status has been changed to 'Return authorized' ('Create' link appeared in the CREDIT STATUS column)

Returns

[Check all](#) / [Uncheck all](#)

	RETURNID	CUSTOMER	PRODUCT	ORDER	DATE	STATUS	CREDIT STATUS
<input type="checkbox"/>	RMA#3	Jill Backer	Microsoft Wireless Intellimouse Explorer	3008	Aug 2, 2004	Return authorized ▾	Create
<input type="checkbox"/>	RMA#4	Jill Backer	Indesit W103Washing Machine (a)	3009	Aug 2, 2004	Return requested ▾	Creation of credit forbidden

Delete selected
Update

The operations below are for the first selected item only:

Modify

Clicking on the **Create** link allows you to issue a credit to the customer who requested the return. The Credit status is changed to **Created**.

Picture 6: Credit has been created for RMA#3 return request ('Create' link has changed to 'Created').

Returns

[Check all](#) / [Uncheck all](#)

	RETURNID	CUSTOMER	PRODUCT	ORDER	DATE	STATUS	CREDIT STATUS
<input type="checkbox"/>	RMA#3	Jill Backer	Microsoft Wireless Intellimouse Explorer	3008	Aug 2, 2004	Return authorized ▾	Created
<input type="checkbox"/>	RMA#4	Jill Backer	Indesit W103Washing Machine (a)	3009	Aug 2, 2004	Return requested ▾	Creation of credit forbidden

Delete selected
Update

The operations below are for the first selected item only:

Modify

When you create a credit, your customer gets a Gift Certificate for the sum of his return which he can use to purchase other things in your store. The number of this GC is automatically sent to the customer's e-mail address. You can click the **Created** link to view the details of the issued GC:

Picture 7: GC details (can be seen after you click the **Created** link).

Gift Certificate Details

Gift Certificate Details

From: **Return service**
To: **jill_b**
Message:
Amount: **£53.00**

E-mail Address

E-Mail: **jill_backer79@hotmail.com**

[Go Back](#)

To delete an existing return request:

1. In the *Returns list*, select the check box next to the return request you want to remove.
2. Click on **Delete selected**.

Adding/Modifying reasons for returns

We included with the module a few pre-set reasons for which a customer might want to return the products sent to him (like 'Wrong item ordered' or 'Damaged during shipping', etc). Every time a customer creates a return request, he has to choose one of these reasons to explain why the return is requested. If necessary, you can modify the reasons we provided, or you can add reasons of your own which are specific for your store.

To add new reasons for returns or to modify the existing ones, select **Add/Modify reasons** from the *Returns* section menu.

To add a new reason:

1. Fill in the **New reason** field.
2. Click on **Update**. The new reason will be added to the list.

Picture 8: Adding reasons



The screenshot displays the 'Add/Modify reasons' interface. At the top, there is a header 'Add/Modify reasons'. Below this, a list of reasons is shown, each in a text box with a 'Delete' link to its right:

- Wrong item ordered [Delete](#)
- Wrong description online [Delete](#)
- Do not like the product [Delete](#)
- Can't get it to work [Delete](#)
- Manufacturer defect or DOA [Delete](#)
- Damaged during shipping [Delete](#)
- Wrong item sent [Delete](#)

Below the list, there is a section titled 'New reason' with a horizontal line underneath. Under this section, there is an empty text input field and a button labeled 'Update'.

To delete a reason click on **Delete** next to the reason you want to remove.

Adding/Modifying actions

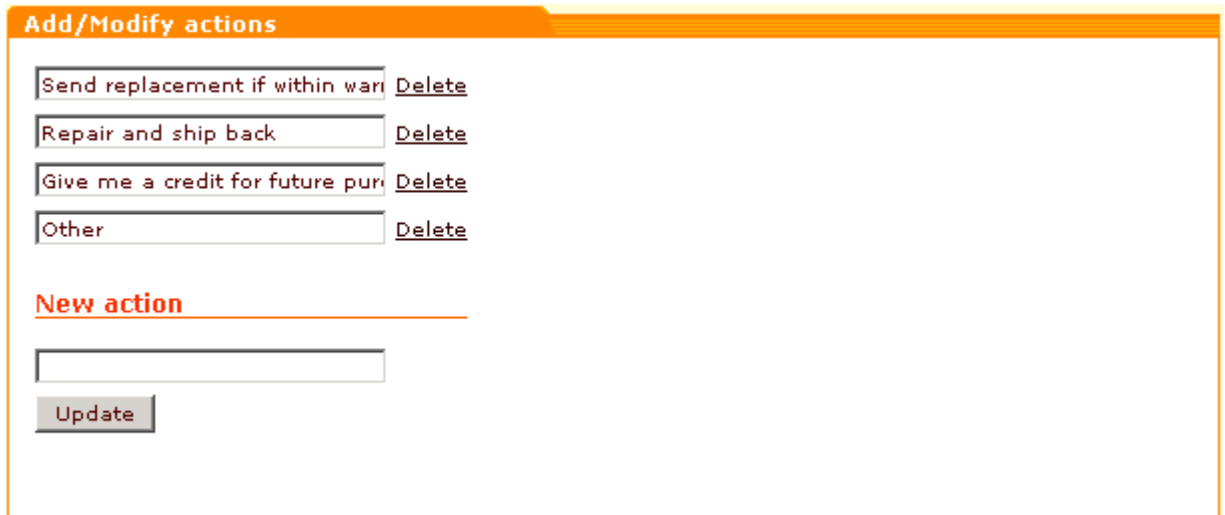
An *action* is what a customer would like you to do when he requests a return. For example, he might want you to give him a credit for future purchases at your store, or to repair the broken item and send it back to him, etc.

Select **Add/Modify actions** in the *Returns* section menu.

To add an action:

1. Fill in the **New action** field.
2. Click on **Update**.

Picture 9: Adding actions



The screenshot displays the 'Add/Modify actions' interface. At the top, there is a header 'Add/Modify actions'. Below this, there is a list of existing actions, each with a text input field and a 'Delete' link to its right. The actions listed are: 'Send replacement if within war...', 'Repair and ship back', 'Give me a credit for future pur...', and 'Other'. Below the list, there is a section titled 'New action' with a red underline. Underneath this section, there is a single text input field and a grey 'Update' button.

To delete an existing action click on **Delete** next to the action you want to remove.

Customer zone

Creating return requests

To create a product return request:

1. Select **Orders history** from *Your cart* menu.
2. Search for the order you would like to create a return request for.
3. Click on its number or status, and the *Order details* page opens.
4. Scroll down to the *Create return request* form.

Note. A customer can create return requests only for products the product return time of which is greater than 0 (zero). If you do not see the *Create return request* form on the *Order details* page, the creation of the return request is impossible. It means that either the return time of the products in your order is 0 (zero), or the time during which the return request could be placed expired.

5. Set the amount of the product(s) you want to return.
6. Select the reason for returning.
7. Select the action you would like the store administration to do for you.
8. Leave your comments, if necessary.
9. Click on **Create**.

Picture 10: Create return request form.

Create return request

Product	Amount
<input type="checkbox"/> Indesit W103Washing Machine (a)	1

Reason for returning:
Wrong item ordered

What you would like us to do:
Send replacement if within warranty

Comment:

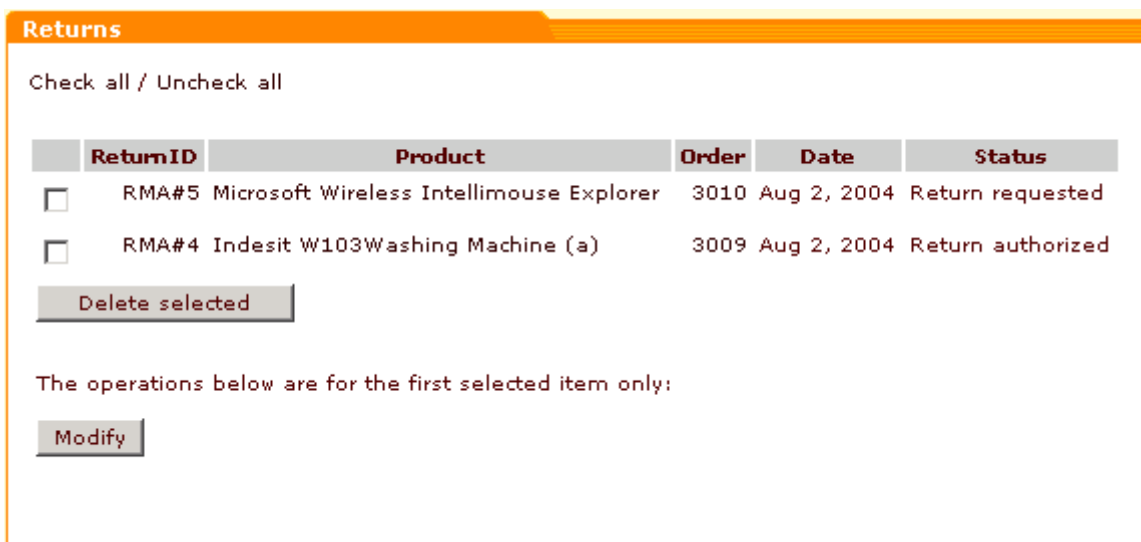
Create

After the return request has been successfully created, the confirming notification appears at the top of the page.



The new request is added to the *Returns list*. To view the list of his return requests, a customer needs to click on **Returns** in *Your cart* menu. The current status of each request in the list is shown in the **Status** column.

Picture 11: Return request status.



A customer gets an e-mail notification when his return request is authorized.

Managing previously placed return requests

You can modify/delete the return requests previously placed by you via the **Returns** item in *Your cart* menu.

To modify an existing return request:

1. Click on **Returns** in *Your cart* menu. The return search form appears.

Picture 12: Return search form.

2. Use this form to find the return request you would like to modify. The search results will be displayed in the form of a list.

Picture 13: Returns list

ReturnID	Product	Order	Date	Status
<input type="checkbox"/> RMA#5	Microsoft Wireless Intellimouse Explorer	3010	Aug 2, 2004	Return requested
<input type="checkbox"/> RMA#4	Indesit W103Washing Machine (a)	3009	Aug 2, 2004	Return authorized

3. Do one of the following:
 - Select the check box next to the return request you would like to modify and click on **Modify**.
 - Click on the return ID link of the request you would like to modify.

The return *Modify* form opens.

Picture 14: Modify form.

The screenshot shows a web form titled "Modify" with an orange header. In the top right corner of the form area, there is a link "Returns list" followed by a "Go" button. The form contains three main sections: "Reason for returning" with a dropdown menu currently set to "Wrong item ordered"; "What you would like us to do" with a dropdown menu currently set to "Send replacement if within warranty"; and a "Comment" section with a large text input area. At the bottom of the form are two buttons: "Modify" and "Print Return slip".

4. Select the reason for returning the product.
5. Select an action from the drop-down list.
6. Add your comments if necessary.
7. Click on **Modify**.

Note. To print the return slip, click on **Print Return slip**.

To delete an existing return request:

1. Search for the necessary return request in the **Returns** section.
2. In the *Returns list*, select the check box next to the request you would like to remove.
3. Click on **Delete selected**.

Appendix

Here is the list of files included into the module.

```
INSTALL.X-RMA
install-xrma.php
returns.php
admin/...
returns.php
modules/RMA/...
add_returns.php
config.php
func.php
returns.php
skin1_original/mail...
rma_authorize.tpl
rma_authorize_subj.tpl
rma_decline.tpl
rma_decline_subj.tpl
rma_request_created.tpl
rma_request_created_subj.tpl
skin1_original/mail/html/...
rma_authorize.tpl
rma_decline.tpl
rma_request_created.tpl
skin1_original/modules/RMA/...
actions.tpl
add_returns.tpl
admin_menu.tpl
customer_menu.tpl
modify_return.tpl
reasons.tpl
return_slip.tpl
returns.tpl
sql/...
x-rma.sql
x-rma_remove.sql
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