

# X-RMA add-on module for X-Cart 4.2.2

User Manual



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# **X-RMA add-on module**

## **for X-Cart 4.2.2**

### **User Manual**

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*This User Manual is intended for X-RMA add-on module for X-Cart v. 4.2.2. It covers most of the areas of the add-on module's installation and use and is applicable for both X-Cart GOLD and X-Cart PRO versions.*

## **X-RMA add-on module for X-Cart 4.2.2. User manual.**

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**Thank you for choosing X-Cart software solutions!**



# 1 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](http://www.x-cart.com).



## 2 Installing and uninstalling X-RMA

Find out the system requirements for X-RMA:

- [System Requirements](#)

Learn to install and uninstall X-RMA:

- [Installing X-RMA](#)
- [Uninstalling X-RMA](#)

### 2.1 System requirements

For successful installation and work of the module you need an already installed X-Cart GOLD or PRO 4.2.2 . The version of the X-RMA module being installed must correspond to the version of your X-Cart (the main software unit onto which the module is being added).

### 2.2 Installing X-RMA

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.

**Note:** Please make sure you keep the directory structure during unpacking and uploading, otherwise some necessary files can be overwritten!

3. Run in the browser the installation script [http://www.yourhost.com/xcart\\_dir/install-xrma.php](http://www.yourhost.com/xcart_dir/install-xrma.php)
4. Enter your authentication code, accept the conditions of the License Agreement and click "**Next**".

**Note:** Auth code is a special authentication code that protects your X-Cart installation. Such a code was issued to you when you first installed your X-Cart-based store. If you do not remember your Auth code, you can look it up in X-Cart's file `include/install.php` or in the 'Summary' section of your store's Admin zone.

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.

## 2.3 Uninstalling X-RMA

To uninstall X-RMA, do the following:

1. Launch the Installation Wizard (Point your browser at the location of your store with the addition of / install-xrma.php)
2. At the first step of the Installation Wizard (**Step 1: License agreement**), select the 'Un-install the module' radio button.
3. Click the **Next** button.
4. The Installation Wizard will remove the module files and deactivate the module (**Step 2: Uninstalling the module**). Click **Next** to proceed.
5. **Step 3: Uninstallation complete** is the final step of the uninstallation process. It notifies you that the module has been successfully uninstalled.

**Important:** After uninstalling X-RMA, be sure to remove the module distribution package from your web directory.

## 3 Admin zone

Find out how X-RMA can be activated and configured:

- [Enabling and Configuring X-RMA](#)

Learn how to set product return time:

- [Setting product return time](#)

Find out about ways to manage return requests:

- [Managing return requests](#)

Learn how you can add and modify reasons for returns:

- [Adding/Modifying reasons for returns](#)

Learn to add and modify actions:

- [Adding/Modifying actions](#)

### 3.1 Enabling and configuring X-RMA

#### Enabling X-RMA

After X-RMA add-on module is installed, you need to log into the Admin area of your store and enable it:

1. Go to the 'Modules' section of the store's administration back-end (Administration menu->Modules).
2. In the list of modules and add-ons, find the name 'RMA' and select the check box opposite it.
3. Click the **Update** button at the bottom of the list.

#### Configuring X-RMA

After activation, the add-on module needs to be configured:

1. Go to the section 'General settings/Modules options->RMA options':

**General settings**

---

**RMA**

---

'Return request is created' notification to orders department	<input checked="" type="checkbox"/>
'Return request is authorized' notification to customer	<input checked="" type="checkbox"/>
'Return request is declined' notification to customer	<input checked="" type="checkbox"/>

2. Adjust X-RMA options:

Use the corresponding check boxes to enable notifications to orders department and customer about different statuses of return requests.

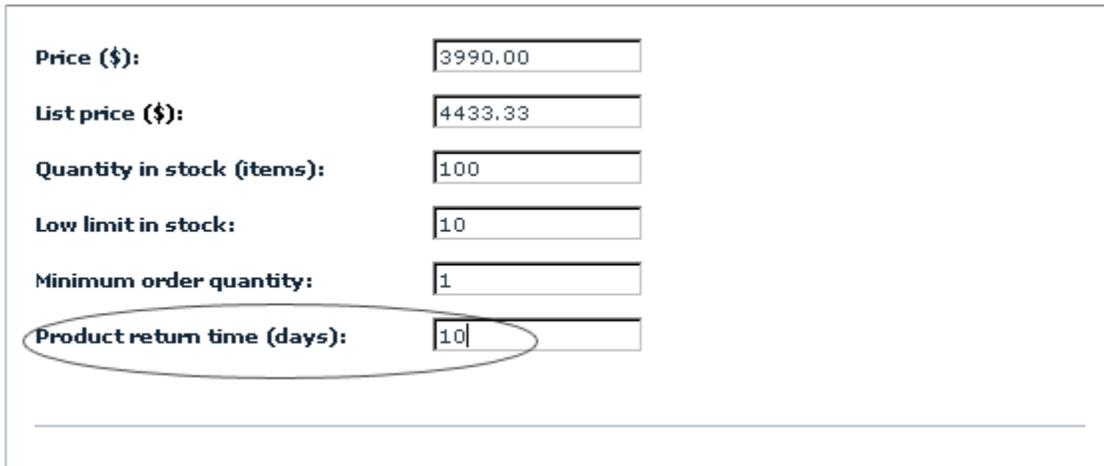
3. Click the '**Save**' button.

## 3.2 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.



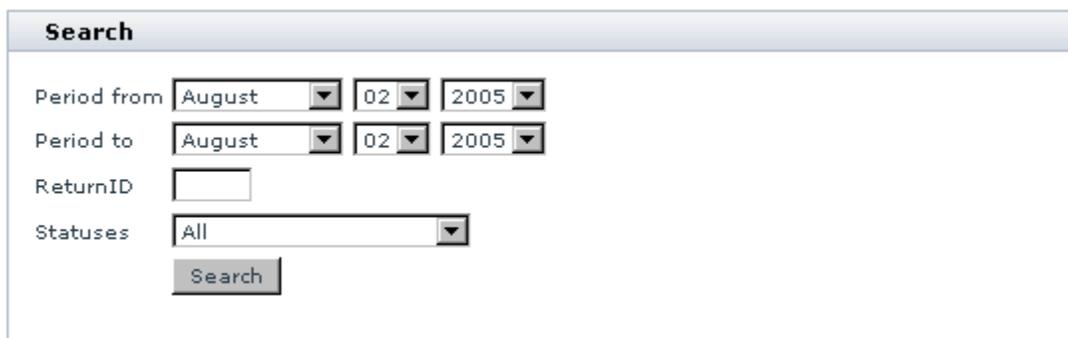
Price (\$):	<input type="text" value="3990.00"/>
List price (\$):	<input type="text" value="4433.33"/>
Quantity in stock (items):	<input type="text" value="100"/>
Low limit in stock:	<input type="text" value="10"/>
Minimum order quantity:	<input type="text" value="1"/>
Product return time (days):	<input type="text" value="10"/>

Picture 1: Setting the product return time

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

### 3.3 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.



<b>Search</b>			
Period from	<input type="text" value="August"/>	<input type="text" value="02"/>	<input type="text" value="2005"/>
Period to	<input type="text" value="August"/>	<input type="text" value="02"/>	<input type="text" value="2005"/>
ReturnID	<input type="text"/>		
Statuses	<input type="text" value="All"/>		
<input type="button" value="Search"/>			

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.

Returns							
<a href="#">Check all</a> / <a href="#">Uncheck all</a>							
	ReturnID	Customer	Product	Order	Date	Status	Credit status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Jill Backer</a>	<a href="#">Indesit W103 (1Items)</a>	<a href="#">3009</a>	August, 2 2004	Return requested Return requested Return authorized Return declined Return completed Removed by customer	Creation of credit forbidden
<input type="button" value="Delete selected"/>			<input type="button" value="Update"/>				
The operations below are for the first selected item only:							
<input type="button" value="Modify"/>							

Picture 3: Returns list.

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.

The screenshot shows a web form titled "Modify" for editing a return request. The form contains the following fields and controls:

- Customer:** [John Smith](#)
- Product:** [NIKON COOLPIX 880 \(1 Items\)](#)
- Order:** [1031](#)
- Date:** 04-09-2007 14:33:42
- 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 large text area with a vertical scrollbar.
- Status:** A dropdown menu with "Return authorized" selected.
- Buttons:** "Modify" and "Print Return slip".
- Link:** "Returns list" with a right-pointing arrow.

Picture 4: Modify form.

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.

2 results found

Returns							
Check all / Uncheck all							
	ReturnID	Customer	Product	Order	Date	Status	Credit status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">John Smith</a>	<a href="#">NIKON COOLPIX 880 ARGENT (1 Items)</a>	<a href="#">1031</a>	04-09-2007 14:33:42	Return authorized ▼	680.00 <a href="#">Create</a>
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">John Smith</a>	<a href="#">NIKON COOLPIX 880 ARGENT (1 Items)</a>	<a href="#">1032</a>	04-09-2007 14:33:52	Return requested ▼	Creation of credit forbidden

The operations below are for the first selected item only:

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)

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**.

2 results found

Returns							
Check all / Uncheck all							
	ReturnID	Customer	Product	Order	Date	Status	Credit status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">John Smith</a>	<a href="#">NIKON COOLPIX 880 ARGENT (1 Items)</a>	<a href="#">1031</a>	04-09-2007 14:33:42	Return authorized ▼	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">John Smith</a>	<a href="#">NIKON COOLPIX 880 ARGENT (1 Items)</a>	<a href="#">1032</a>	04-09-2007 14:33:52	Return requested ▼	Creation of credit forbidden

The operations below are for the first selected item only:

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

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:

### Gift Certificate Details

**Gift Certificate Details**

---

From: **Return service**  
To: **customer**  
Message:   
Amount: **\$680.00**  
Template: **template\_default.tpl**

**E-mail Address**

---

E-mail: **johnsmith2003@yahoo.com**

[Go Back](#)

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

**Note:** please be aware that when a return request receives a *Return authorized* or *Return completed* status, it is not automatically reflected in the "Quantity in stock (items)" of the product. If you approve a return request, you will need to edit the quantity in stock manually if and when the product is returned.

### 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**.

## 3.4 Adding/Modifying reasons for returns

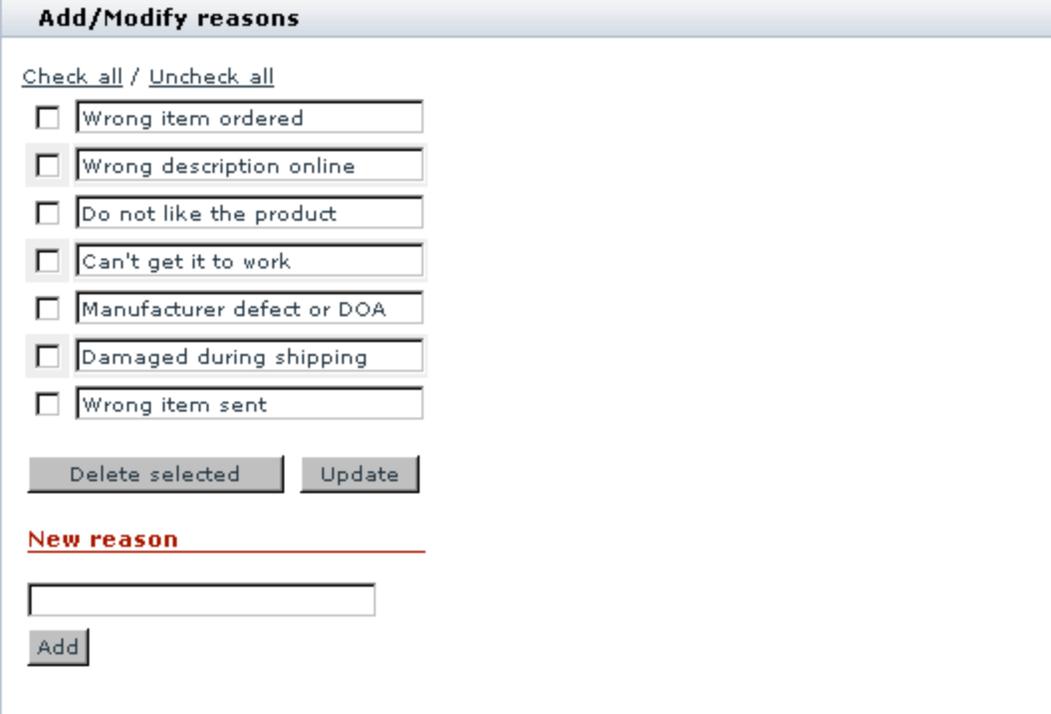
### Adding/Modifying reasons for returns

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.



**Add/Modify reasons**

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

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

**New reason**

Picture 8: Adding reasons

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

## 3.5 Adding/Modifying actions

### Adding/Modifying actions

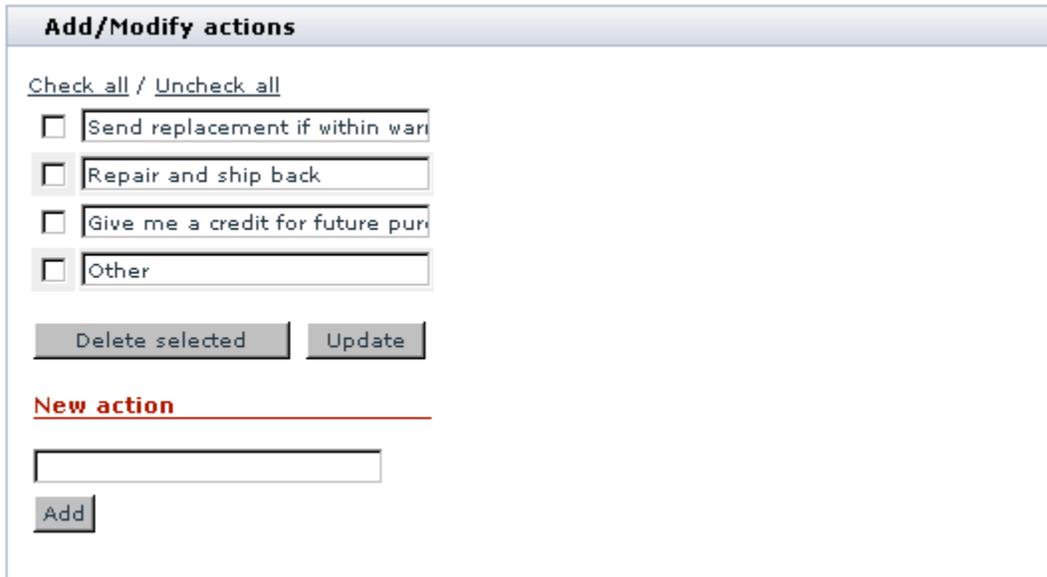
An *action* is what a customer would like you to do when he requests a return. For example, he might want you to give him a credit for future purchases at your store, or to repair the broken item and send it back to him, etc.

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

### To add an action:

1. Fill in the **New action** field.

2. Click on **Update**.



**Add/Modify actions**

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

Send replacement if within warranty

Repair and ship back

Give me a credit for future purchases

Other

Delete selected    Update

**New action**

Add

Picture 9: Adding actions

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

## 4 Customer zone

Find out how to create return requests:

- [Creating return requests](#)

Learn about the ways to manage previously placed return requests:

- [Managing previously placed return requests](#)

### 4.1 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**.

### Create return request

Product	Quantity
<input type="checkbox"/> Designing Web Usability Cover: Soft	1

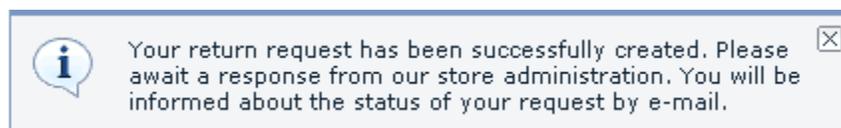
Reason for returning:  
Wrong item ordered

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

Comment:

Picture 10: Create return request form.

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.

3 results found

Returns					
Check all / Uncheck all					
	ReturnID	Product	Order	Date	Status
<input type="checkbox"/>	RMA#1	NIKON COOLPIX 880 ARGENT (1 Items)	1031	04-09-2007 14:33:42	Return authorized
<input type="checkbox"/>	RMA#2	NIKON COOLPIX 880 ARGENT (1 Items)	1032	04-09-2007 14:33:52	Return requested
<input type="checkbox"/>	RMA#3	Designing Web Usability (1 Items) Cover: Soft	1036	12-12-2007 14:34:32	Return requested

[Delete selected](#)

The operations below are for the first selected item only:

[Modify](#)

Picture 11: Return request status.

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

## 4.2 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.

**Search**

Period from: September 04 2007

Period to: December 12 2007

ReturnID:

Statuses: All

Picture 12: Return search form.

- 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.

3 results found

Returns					
<a href="#">Check all</a> / <a href="#">Uncheck all</a>					
	ReturnID	Product	Order	Date	Status
<input type="checkbox"/>	RMA#1	NIKON COOLPIX 880 ARGENT (1 Items)	1031	04-09-2007 14:33:42	Return authorized
<input type="checkbox"/>	RMA#2	NIKON COOLPIX 880 ARGENT (1 Items)	1032	04-09-2007 14:33:52	Return requested
<input type="checkbox"/>	RMA#3	Designing Web Usability (1 Items) Cover: Soft	1036	12-12-2007 14:34:32	Return requested

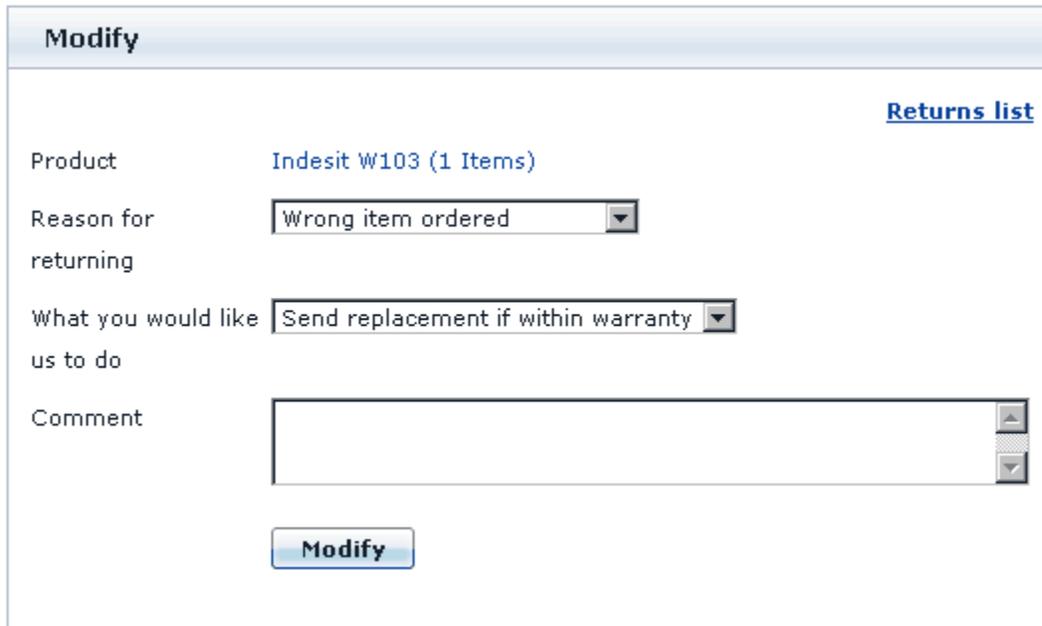
The operations below are for the first selected item only:

Picture 13: Returns list

- 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.



The screenshot shows a web form titled "Modify" with a light blue header. In the top right corner, there is a link labeled "Returns list". The form contains the following fields:

- Product:** Indesit W103 (1 Items)
- 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 large text area with a vertical scrollbar on the right side.

At the bottom of the form is a blue button labeled "Modify".

Picture 14: Modify form.

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**.

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