

Refund Request

Dss

To install Magento 2 RefundRequest extension:

Step 1: Unzip the file.

Step 2:

Create a new directory: `app/code/Dss/RefundRequest`. RefundRequest is the module's internal identifier which can be found in the "composer.json" file of the downloaded compressed file. (Please see node "psr-4").

Step 3:

Upload to root file of your Magento installation to have this directory `rootfile/app/code/Dss/RefundRequest`. The Magento root directory contains directories such as "app", "bin", "lib" and more. All directories should match the existing directory structure.

Step 4:

Go to Magento 2 root directory. Enter command line:

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

```
php bin/magento setup:static-content:deploy
```

```
php bin/magento cache:flush
```

1. How It work?

Refund Request by Customer for Magento 2 extension allows customers to submit a refund request on the Customer Account Page. Admins receive the notification of new refund request and accept or reject that request on the Refund Request Grid.

1.1 - General Configs

1.1.1 - General

Go to **Stores ⇒ Configuration ⇒ DSS ⇒ Refund Request by Customer**.

General Configuration

Enabled
[store view] Yes

Version 0.0.1

Apply Refund Request for Orders
[store view]

- Canceled
- Closed
- Complete
- Suspected Fraud
- On Hold
- Payment Review
- PayPal Canceled Reversal
- PayPal Reversed
- Pending
- Pending Payment

- In **Enabled**, choose Yes to enable the extension, or No to disable it.
- In **Apply Refund Request for Orders**, choose the types of orders to apply the refund function.

1.1.2 - Refund Request Popup

Refund Request Popup

Popup Title
[store view] Refund Request

Fill in the name of the Refund Request popup

Popup Description
[store view] We are sorry to know that you want a refund, Please tell us what trouble you,

Fill in the description of the Refund Request popup placed under the popup title.

Enable Dropdown Field
[store view] Yes

Title of Dropdown Field
[store view] Specify whih type of refund

Please go to Sales > Refund Request Dropdown Options to create new options for the dropdown.

Enable Yes/No Field
[store view] Yes

Title of Yes/No Field
[store view] Product is opened?

Title of Refund Reason Field
[store view] Faulty or other reason in detail

This is field for customers to state the detailed reason of requesting a refund.

- In **Popup Title**, fill in the name of the Refund Popup.
- In **Popup Description**, fill in the description of the Refund Popup. This section is under the Popup Title.
Refund Popup consists of title, description, and other fields (dropdown, yes/no, text area field) to effectively collect customers' refund request.
- In **Enable Dropdown Field**, choose Yes to enable this field.
- In **Title of Dropdown Field**, fill in the title of this field.

Then go to Sales ⇒ Refund Request Dropdown Options to create the options for the dropdown field. See tutorial in 1.4.

- In **Enable Yes/No Field**, choose Yes to enable this field.
- In **Title of Yes/No Field**, fill in the title of this field.
- In **Title of Refund Reason Field**, fill in the title for this field. This is the text area field for customers to state why they want to refund.

Let's see an example to understand the component of Refund Popup:

The image shows a 'REFUND REQUEST' popup form overlaid on a blurred background of an e-commerce interface. The popup has a title bar with 'REFUND REQUEST' and a close button. Below the title bar, there is a description: 'We are sorry to know that you want a refund. Please let us know what's wrong'. This is followed by a 'Reason for refund' dropdown menu with 'Opened Box' selected. Below the dropdown is a 'Product is opened' section with 'Yes' and 'No' radio buttons. At the bottom of the form is a 'Faulty or other detail' text area. Two buttons, 'Send Request' and 'Cancel Request', are at the bottom right of the popup. Red arrows point from labels to specific parts of the form: 'Popup Title' points to the title bar, 'Popup Description' points to the description text, 'Dropdown Field' points to the 'Reason for refund' dropdown, 'Yes/No Field' points to the 'Product is opened' radio buttons, and 'Refund Reason Field' points to the 'Faulty or other detail' text area.

1.1.3 - Email Configs

Email Configuration

Admin Email <small>[store view]</small>	<input type="text" value="info@digitsoftsol.com"/>
Comma-separated	
Email Sender <small>[store view]</small>	<input type="text" value="General Contact"/>
Notify Email Template <small>[store view]</small>	<input type="text" value="Notify Email Template (Default)"/>
Approve Email Template <small>[store view]</small>	<input type="text" value="Accept Email Template (Default)"/>
Reject Email Template <small>[store view]</small>	<input type="text" value="Reject Email Template (Default)"/>

- In **Admin Email**, enter the mail of admin who will receive the notification email each time the new refund request is submitted. In case you want to enter various admin emails at the once, please use comma to separate each email address.
- In **Email Sender**, select a person who is entitled for sending email.
- In **Notify Email Template**, select a template for email notifying new refund request to admin.
- In **Approve Email Template**, select a template for email notifying customers that their refund request is accepted.
- In **Reject Email Template**, select a template for email notifying customers that their refund request is rejected.

See the tutorial in 1.5 to create the email template.

1.2 - Order Grid

Go to **Sales ⇒ Orders ⇒ Order Grid**.

Orders

🔍🔔1👤dss▼

Create New Order

Search by keyword🔍

Filters👁️ Default View⚙️ Columns▼📄 Export▼

Actions▼12 records found20 per page1 of 1

👇	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Allocated sources	Braintree Transaction Source	Refund Status
<input type="checkbox"/>	000000012	Main Website Main Website Store Default Store View	Aug 9, 2024 2:57:11 AM	test test	test test	\$161.80	\$161.80	Pending	View			N/A
<input type="checkbox"/>	000000011	Main Website Main Website Store Default Store View	Aug 7, 2024 1:01:49 AM	test test	test test	\$13.65	\$13.65	Complete	View	Default Source		Reject
<input type="checkbox"/>	000000010	Main Website Main Website Store Default Store View	Aug 7, 2024 1:01:37 AM	test test	test test	\$1,365.00	\$1,365.00	Pending	View			Accept
<input type="checkbox"/>	000000009	Main Website Main Website Store Default Store View	Aug 7, 2024 12:52:25 AM	test test	test test	\$40.95	\$40.95	Pending	View			Reject
<input type="checkbox"/>	000000008	Main Website Main Website Store Default Store View	Aug 7, 2024 12:43:45 AM	test test	test test	\$13.65	\$13.65	Pending	View			N/A

A new column named **Refund Status** is added to the **Order Grid**. This column reflects the status of refund for the orders, which includes 2 statuses: **Reject** and **Accept**.

1.3 - Refund Request Grid

Go to **Sales ⇒ Refund Request by Customer ⇒ Refund Request Grid**.

Refund Request

Search by keyword

Filters

Default View

Columns

Export

Actions

3 records found

20 per page1 of 1

Detailed Reason	ID	Customer Name	Customer Email	Increment Id	Refund Date		Type of Refund	Status	Product is Opened
				000000009	Aug 9, 2024 2:54:36 AM	<input type="checkbox"/>	Opened Box	Pending	No
				000000011	Aug 9, 2024 2:49:08 AM	<input type="checkbox"/>	Opened Box	Reject	Yes
				000000010	Aug 9, 2024 2:49:55 AM	<input type="checkbox"/>	Opened Box	Accept	No

The **Refund Request Grid** displays all refund requests collected from the Refund popup form. This grid consists of information of customers and their refund request, including Customer Name, Customer Email, Increment ID, Type of Refund, Product is Opened, Detailed Reason, Refund Date, and Status.

You can accept or reject the refund request here. Click on the request (you can choose multiple requests), then click on the **Action** dropdown to select 1 of 3 actions: **Accept**, **Reject**, and **Delete**.

Refund Request

Search by keyword

3 records found (3 selected)

Actions

3 records found (3 selected)

Select 1 or multiple refund requests to accept or reject

Delete

Accept

Reject

Detailed Reason	ID	Customer Name	Customer Email	Increment Id
				000000009
				000000011
				000000010

1.4 - Refund Request Dropdown Options

Go to **Sales** ⇒ **Refund Request Dropdown Options**

Refund Request Dropdown Options

Search by keyword

Filters

Default View

Columns

Export

Actions

2 records found

20 per page1 of 1

Add New Option

ID	Option	Status
10	Opened Box	Enable
11	Damaged Product	Disable

The **Refund Request Dropdown Options Grid** allows you to create new options for the dropdown field of **Refund Popup**.

- Click **Add New Option** to create a new option.

← Back Reset **Save**

EDIT OPTION

Add New

Option *

Status **Enable** ▾





- In **Option**, fill in the name of the new dropdown option.
- In **Status**, choose Enable to make the option active.
- Click the **Save** button to save the configuration.

1.5 - Email Template

Please navigate to **Marketing ⇒ Email Templates**

Add New Template

Search Reset Filter 0 records found 20 ▾ per page < 1 of 1 >

ID	Template	Added	Updated	Subject	Template Type	Action
		From 	From 			
		To 	To 			
No Templates Found						

Click the **Add New Template** button to create a new email template.

← Back Reset Convert to Plain Text Preview Template **Save Template**

Load Default Template

Template *

SMTP Test Email

Dss_RefundRequest
Accept Email Template
Notify Email Template
Reject Email Template
Magento_AdminAdobeIm
Footer
Header
New AdminAdobeIm Admin Created
Magento_Checkout
Payment Failed
Magento_Contact
Contact Form
Magento_Customer
Change Email
Change Email and Password
Forgot Password
New Account
New Account (Magento/luma)
New Account Confirmation Key

Template Name *

Template Subject *

Template Content *

- In **Template**, select the option under **Dss_RefundRequest**. Then click the Load Template button.

- In Template Name, fill in the name for the template.
- The other fields are automatically filled in after you load the template. The following are three types of emails.

Accept Email Template

Search 1 dss

← Back Delete Template Reset Convert to Plain Text Preview Template Save Template

Template Information

Template Name * Accept Email Template

Template Subject * {{(trans "Refund Request Has Been Accepted")}}

Insert Variable...

Template Content *

```
{{(template config_path="design/email/header_template")}}
<table width="100%">
<tr class="email-intro" style="font-family: Roboto; font-size: 21.5px;">
<td>
<p class="greeting" style="margin-bottom: 0px">
<b>{{(trans "Dear %customerName," customerName=$customerName)}}</b>
</p>
<p>
<b>{{(trans "Your refund request has been accepted."}}</b>
</p>
</td>
</tr>
<tr class="email-summary" style="font-family: Roboto; font-size: 17px;">
<td style="padding-bottom: 20px">
<b>{{(trans "Order ID "}}</b>{{(trans "##incrementId" incrementId=$incrementId)}}<br>
<b>{{(trans "Refund Request ID "}}</b>{{(trans "##id" id=$id)}}<br>
<hr style="margin-bottom: 5px; margin-top: 5px;">
<p>{{(trans "Accepted at %timeApproved " timeApproved=$timeApproved)}}</p>
</td>
</tr>
</table>
```

Template Styles

1.5.1 - Notify Email Template



Hello harshb@digitsoftsol.com,

You have new refund request from Default.

Order ID #0000000012

Refund create at 2024-08-09 06:57:11 GMT

1.5.2 - Accept Email Template



Dear test test,
Your refund request has been accepted.

Order ID #000000010

Refund Request ID #12

Accepted at 2024-08-09 05:03:43 AM Eastern Standard Time
(America/New_York)

Please accept our sincere apology for the inconvenience. We will process your
refund request as soon as possible.
Have a good day!



Thank you!

1.5.3 - Reject Email Template



Dear test test,
Your refund request has been rejected.

Order ID #000000010

Refund Request ID #12

Rejected at 2024-08-09 03:29:28 AM Eastern Standard Time
(America/New_York)

We are sorry to announce that your refund request is rejected due to your violation against the [Refund and Return Policy](#).

If you have further questions please contact us at [978452163201](tel:978452163201) or email sales@example.com



Thank you!