# **Refund Request**

## **Dss**

### To install Magento 2 Discount Limit 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

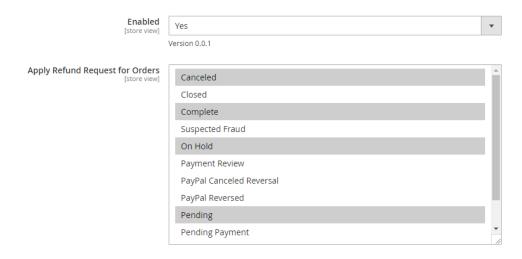
### 1. How It work?

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

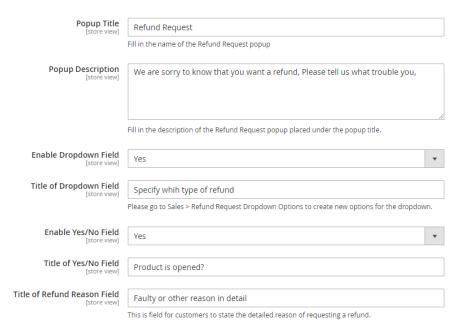
Go to Stores  $\Rightarrow$  Configuration  $\Rightarrow$  DSS  $\Rightarrow$  Refund Request by Customer.



- 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



- 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.

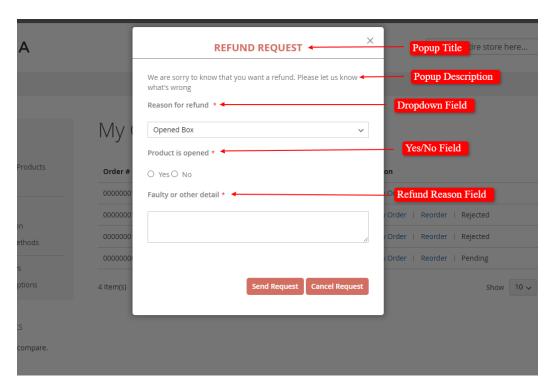
Refund Popup consists of title, description, and other fields (dropdown, yes/no, text area field) to effectively collect customers' refund request.

- 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  $\Rightarrow$  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 tile 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:



## 1.1.3 - Email Configs

**Email Configuration** 

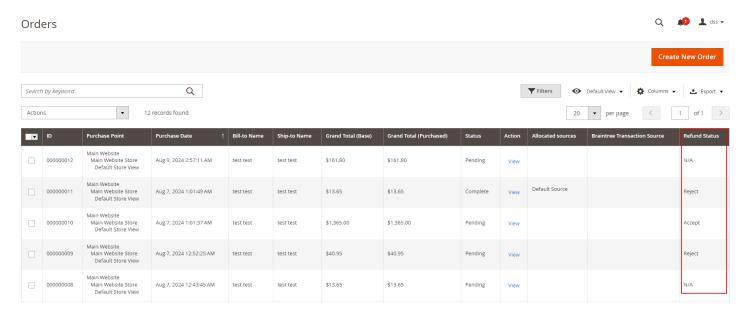


- In **Admin Email**, enter the mail of admin who will receive the notification email each time the new refund request is submitted. In case you want to enter various admin emails at the once, please use comma to separate each email address.
- In Email Sender, select a person who is entitled for sending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

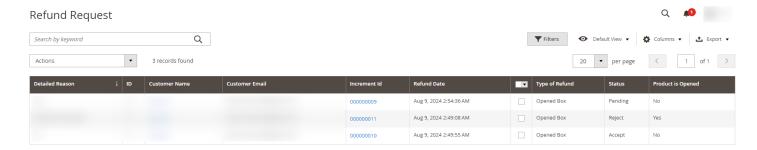
Go to Sales  $\Rightarrow$  Orders  $\Rightarrow$  Order Grid.



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.



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**.

# Select 1 or multiple refund requests to accept or reject Actions Select 1 or multiple refund requests to accept or reject 3 records round (5 selected) Detailed Reason Customer Email Increment Id

000000009

000000011

000000010

## 1.4 - Refund Request Dropdown Options

Refund Request

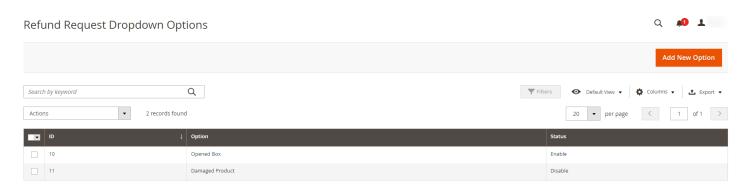
Opened Box

Opened Box

Reject

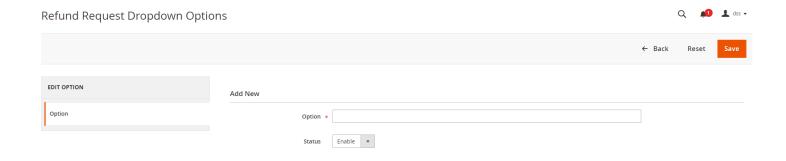
12

## Go to Sales ⇒ Refund Request Dropdown Options



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

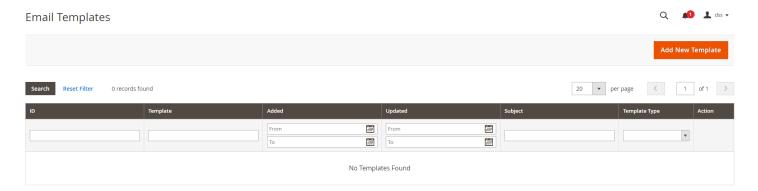
Click Add New Option to create a new option.



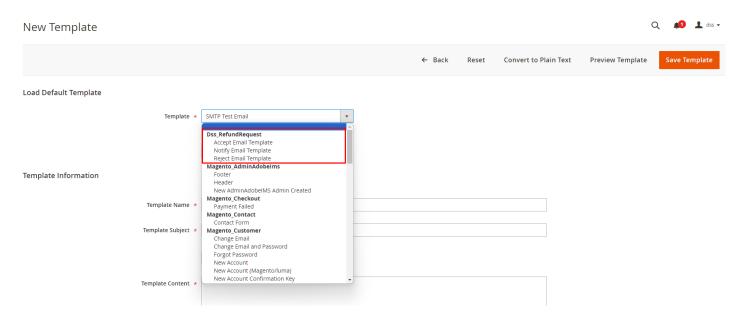
- In **Option**, fill in the name of the new dropdown option.
- In **Status**, choose Enable to make the option active.
- Click the Save button to save the configuration.

## 1.5 - Email Template

Please navigate to **Marketing** ⇒ **Email Templates** 

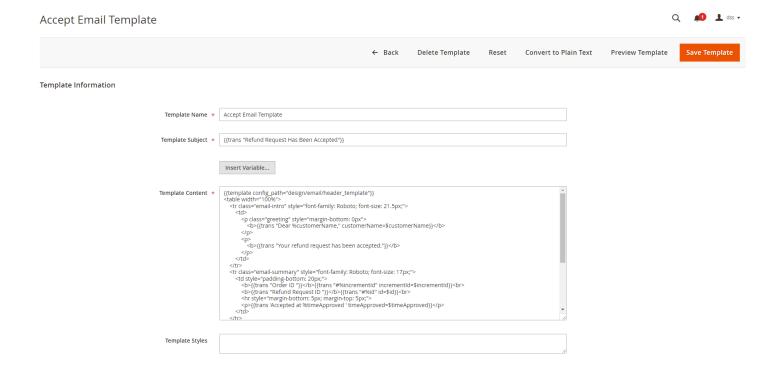


Click the Add New Template button to create a new email template.

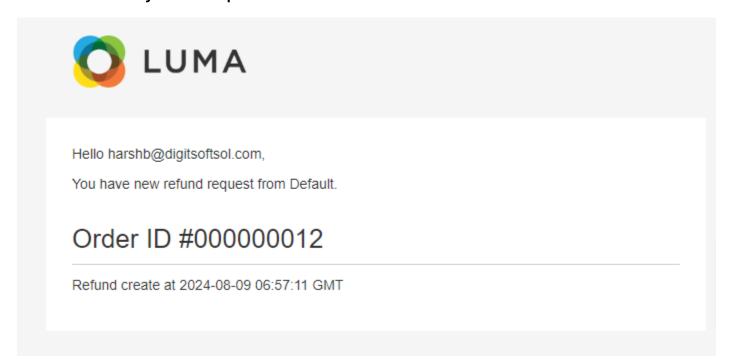


• In Template, select the option under Dss\_RefundRequest. Then click the Load Template button.

- 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.



## 1.5.1 - Notify Email Template



## 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!



## 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 or email sales@example.com



Thank you!