

## Refund Request for Magento 2 User Guide



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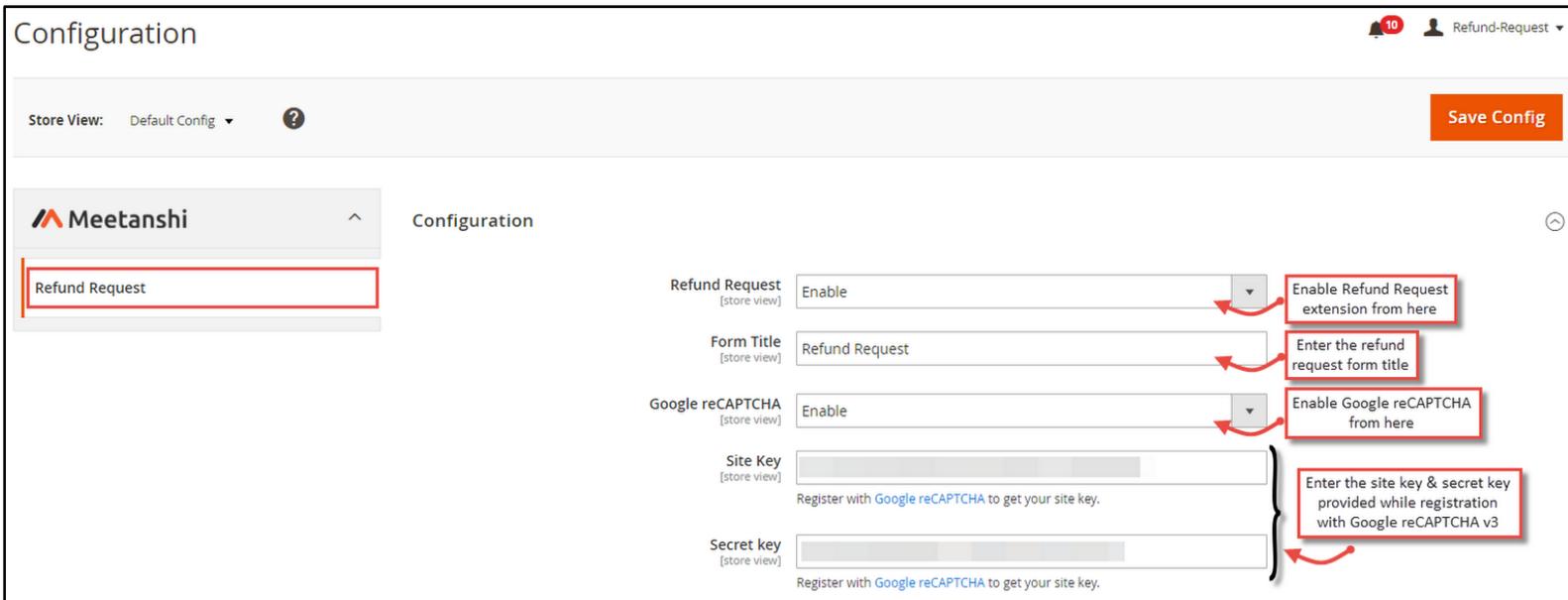
## 1. Extension Installation

- Create a folder structure in Magento root as app/code/Meetanshi/RefundRequest
- Download and extract the zip folder and upload our extension files to the app/code/Meetanshi/RefundRequest e via FTP.
- Login to your SSH and run below commands step by step:
  - php bin/magento setup:upgrade
  - For Magento version 2.0.x to 2.1.x - php bin/magento setup:static-content:deploy
  - For Magento version 2.2.x & above - php bin/magento setup:static-content:deploy -f
  - php bin/magento cache:flush

## 2. Configuration

To configure the extension, login to Magento 2 backend, move to **Stores → Configuration → Refund Request** where you can find various settings to configure the extension.

- **Refund Request:** Enable the extension from here.
- **Form Title:** Enter the refund request form title.
- **Google reCAPTCHA:** Enable the [Google reCAPTCHA v3](#) to avoid spam refund requests.
- **Site Key:** Enter the site key provided while registration with Google reCAPTCHA v3.
- **Secret Key:** Enter the secret key provided while registration with Google reCAPTCHA v3.



Configuration

Store View: Default Config

Save Config

Meetanshi Configuration

Refund Request

Refund Request [store view] Enable

Form Title [store view] Refund Request

Google reCAPTCHA [store view] Enable

Site Key [store view]

Secret key [store view]

Register with [Google reCAPTCHA](#) to get your site key.

Register with [Google reCAPTCHA](#) to get your site key.

Enable Refund Request extension from here

Enter the refund request form title

Enable Google reCAPTCHA from here

Enter the site key & secret key provided while registration with Google reCAPTCHA v3

### 3. Privacy Checkbox Settings

According to EU's GDPR, it's required to inform users about their personal data usage. Here, you get the settings to add privacy policy checkbox in the refund request form and mandate users to agree with it prior refund request submission. Follow the below steps to configure the privacy checkbox settings.

- **Privacy Checkbox:** Enable the privacy policy checkbox.
- **Privacy Notice Text:** Input the privacy notice text to show in the form.
- **Privacy Policy Redirection Page:** Select the Privacy Policy Redirection Page from the drop down to redirect users to read privacy policy of the store.

**Privacy Checkbox Settings**

Privacy Checkbox <small>[store view]</small>	Enable	Enable Privacy Checkbox from here
Privacy Notice Text <small>[store view]</small>	I agree with the	Input the Privacy Notice Checkbox text here
Privacy Policy Redirection Page <small>[store view]</small>	Privacy Policy	Select the Privacy Policy Redirection Page from the drop down

#### 4. Refund Request Email Notification Settings

The extension facilitates sending email notifications both to the admin and to the customers on specific events. Configure the email settings as below.

- **Admin Email ID:** Enter the Admin Email ID.
- **Email Sender:** Select the Email Sender from dropdown menu.
- **Refund Request Submission Success Email Template for Customers:** Select the template to send refund request submission success email to customers.
- **New Refund Request Email Template for Admin:** Select the template to send email to the admin when a new refund request is submitted.
- **Refund Request Approval Email Template for Customers:** Select the template to send email when a customer's refund request is approved by the admin.
- **Refund Request Disapproval Email Template for Customers:** Select the template to send email when a customer's refund request is disapproved by the admin.

Refund Request Email Notification Settings

Admin Email ID <small>[store view]</small>	<input type="text" value="meetanshi.test@yopmail.com"/>	<input type="text" value="Input the Admin Email ID here"/>
Email Sender <small>[store view]</small>	<input type="text" value="General Contact"/>	<input type="text" value="Select the Email Sender from drop down menu"/>
Refund Request Submission Success Email Template for Customers <small>[store view]</small>	<input type="text" value="Customer Notification Template (Default)"/>	<input type="text" value="Select the template for Refund Request submission success Email to Customers"/>
New Refund Request Email Template for Admin <small>[store view]</small>	<input type="text" value="Admin Notification Template (Default)"/>	<input type="text" value="Select the template for new refund request email to Admin"/>
Refund Request Approval Email Template for Customers <small>[store view]</small>	<input type="text" value="Refund Request Approval (Default)"/>	<input type="text" value="Select template to send email to customers on approval or disapproval of the refund requests"/>
Refund Request Disapproval Email Template for Customers <small>[store view]</small>	<input type="text" value="Refund Request Disapproval (Default)"/>	

## 5. Form Field Settings

The refund request comes with some mandatory fields to be submitted by customers for refund request. But the extension facilitates with some extra form fields to add to the form and get the details from customers. You can select these extra fields to be added to the form using below setting.

### Form Field Settings

Select Field/s for Enable [store view]

None

Phone No

Address

City/State

Country

Postal Code

Model No

Batch No

Order Date

Order Place

Select the additional fields to enable in the refund request form

## 6. Manage Refund Reasons

Admin can add refund reasons for customers to choose while submitting refund requests. These reasons can be added and managed by admin through a separate grid under **Refund Request** → **Manage Refund Reasons**.

### Manage Refund Reasons

4 Refund Request

All the created and saved refund reasons are enlisted here

Click here to add new reason Add New Reason

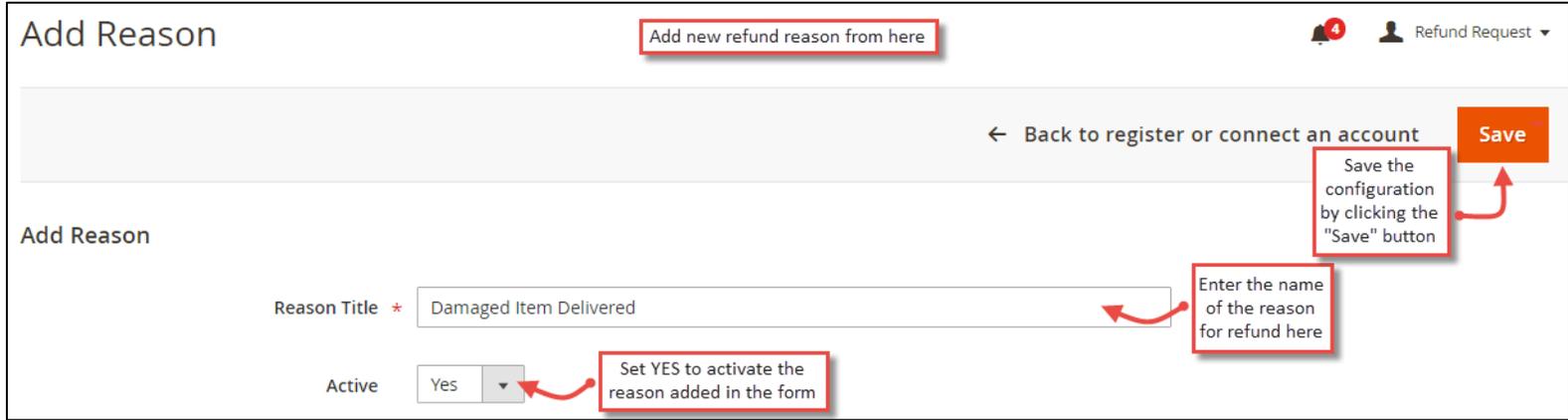
Default View | Columns

Actions 2 records found
20 per page
< 1 of 1 >

<input type="checkbox"/>	ID	Reason Title	Active	Created At	Action
<input type="checkbox"/>	1	Bad Quality	Yes	Jul 4, 2018 10:02:36 AM	<a href="#">Edit</a>
<input type="checkbox"/>	2	Damaged Item Delivered	Yes	Jul 27, 2018 3:52:28 AM	<div style="border: 2px solid red; padding: 2px; display: inline-block;">           Edit the reason from here         </div> <span style="margin-left: 5px; border: 1px solid red; padding: 2px 5px; color: red; font-weight: bold;">Edit</span>

- **Add Reason**

To add a new reason for refund, admin has to click “Add New Reason” button as shown, input the reason title and activate it.



**Add Reason**

Add new refund reason from here

← Back to register or connect an account **Save**

**Add Reason**

Reason Title \* Damaged Item Delivered

Active Yes

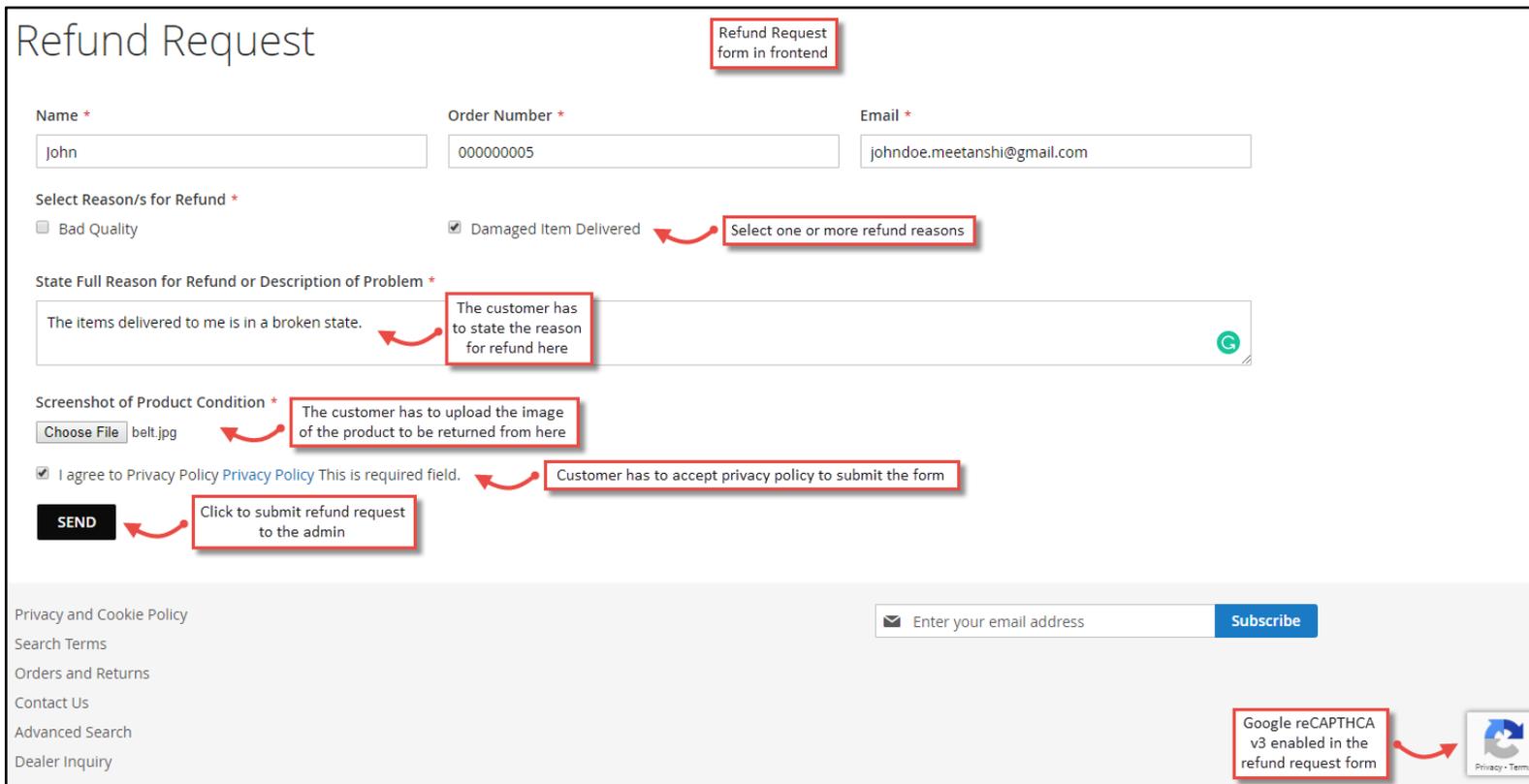
Save the configuration by clicking the "Save" button

Enter the name of the reason for refund here

Set YES to activate the reason added in the form

## 7. Refund Request Form in Frontend

Once the settings are configured, the Refund Request form URL is added to the top link section. On click of the URL, the Refund Request form is enabled for customers to fill up details and submit refund request. Also, Google reCAPTCHA v3 is enabled to restrict the spam inquiry submissions and the privacy policy check box is enabled to comply with EU’s GDPR.



**Refund Request**

Refund Request form in frontend

Name \* Order Number \* Email \*

John 000000005 johndoe.meetanshi@gmail.com

Select Reason/s for Refund \*

Bad Quality  Damaged Item Delivered

State Full Reason for Refund or Description of Problem \*

The items delivered to me is in a broken state.

Screenshot of Product Condition \*

Choose File belt.jpg

I agree to Privacy Policy Privacy Policy This is required field.

**SEND**

Privacy and Cookie Policy

Search Terms

Orders and Returns

Contact Us

Advanced Search

Dealer Inquiry

Enter your email address **Subscribe**

Google reCAPTCHA v3 enabled in the refund request form

## 8. Manage Refund Requests

Immediately after the refund request is submitted by customers, the details of it is saved in the backend under **Refund Request** → **Manage Refund Requests**. Admin can manage all the requests from here.

Manage Refund Requests Admin can view and manage the refund requests from here

Filters | Export | Default View | Columns

Actions | 5 records found | 20 per page | 1 of 1

<input type="checkbox"/>	ID ↑	Order No.	Customer Name	Phone	Email	Country	Reasons	Requested Date	Status	Action	Description
<input type="checkbox"/>	7	5	John	0	johndoe.meetanshi@gmail.com		Damaged Item Delivered,	2018-07-27 00:00:00	Pending	<a href="#">View</a>	The items delivered to me is in a broken state.
<input type="checkbox"/>	6	1	test	1234567890	chandresh22chauhan@gmail.com	Algeria	Bad Quality,	2018-07-05 00:00:00	Disapproved	<a href="#">View</a>	reegt

Refund request submitted from frontend enlisted here

- The admin can approve or disapprove the customers' refund requests using the mass action from the dropdown.

Manage Refund Requests Refund-Request

Filters | Export | Default View | Columns

Actions | 2 records found (1 selected) | 20 per page | 1 of 1

Delete  
 Approved  
 Disapproved

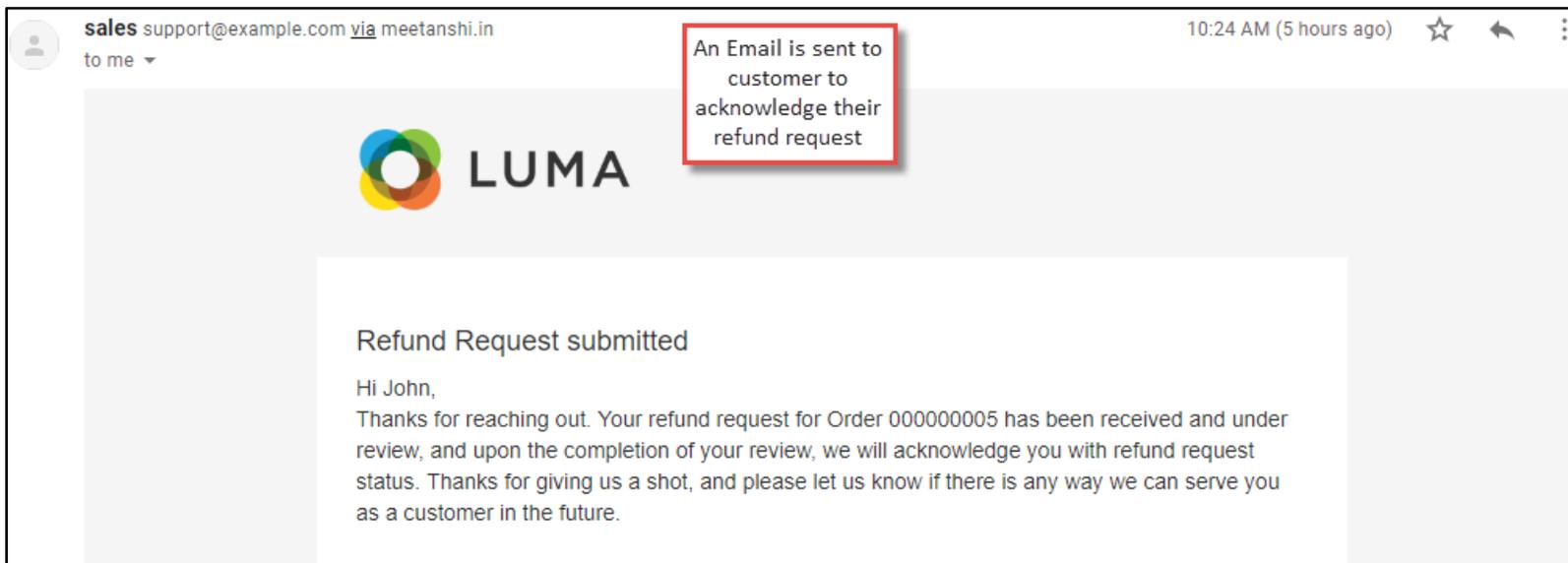
Approve or disapprove refund requests using the mass action

<input type="checkbox"/>	ID	Order No.	Customer Name	Phone	Email	Description	Country	Reasons	Requested Date	Status	Action
<input type="checkbox"/>	1	00000001	Test Meetanshi	123456789	kishor.meetanshi@gmail.com	iPhone screen is cracked.	India	Damaged Item Delivered,	2019-02-22	Approved	<a href="#">View</a>
<input checked="" type="checkbox"/>	2	00000002	John Doe	2147483647	meetanshi.tester@yopmail.com	Faded Jeans color	India	Damaged Item Delivered,	2019-09-11	Pending	<a href="#">View</a>

## 9. Notification Emails

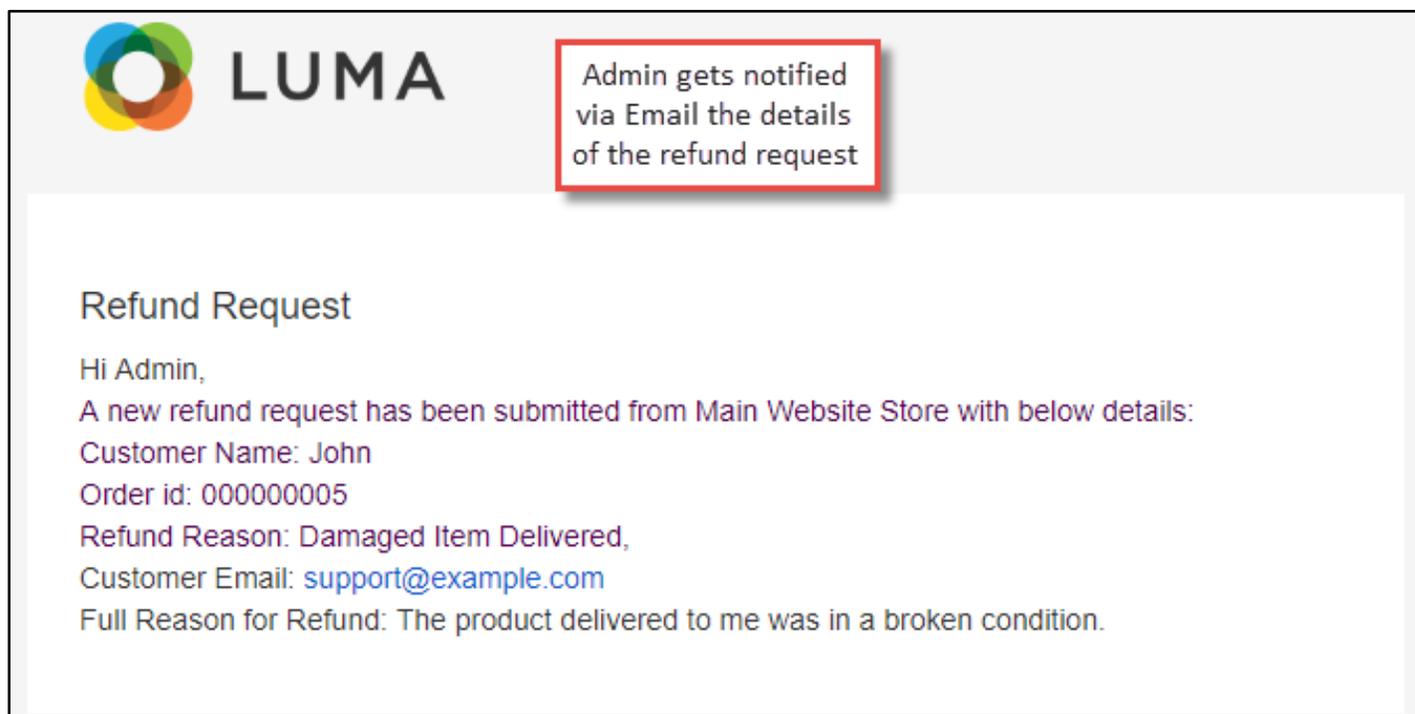
- **Refund Request Submission Success Email to Customers**

Once customers submit refund requests from the frontend, they get acknowledgement Email to notify about successful refund request submission.



- **New Refund Request Email to Admin**

Immediately after a new refund request is submitted by a customer, the admin get Email notification having the details of the refund request.



- **Refund Request Approval Email to the Customers**

Immediately after the admin [approves](#) a customer's refund request, the customer gets notified by an Email for the refund request approval.



**Your refund request for order 000000002 is approved**

From: [Redacted]  
Date: 2020-12-08 15:41

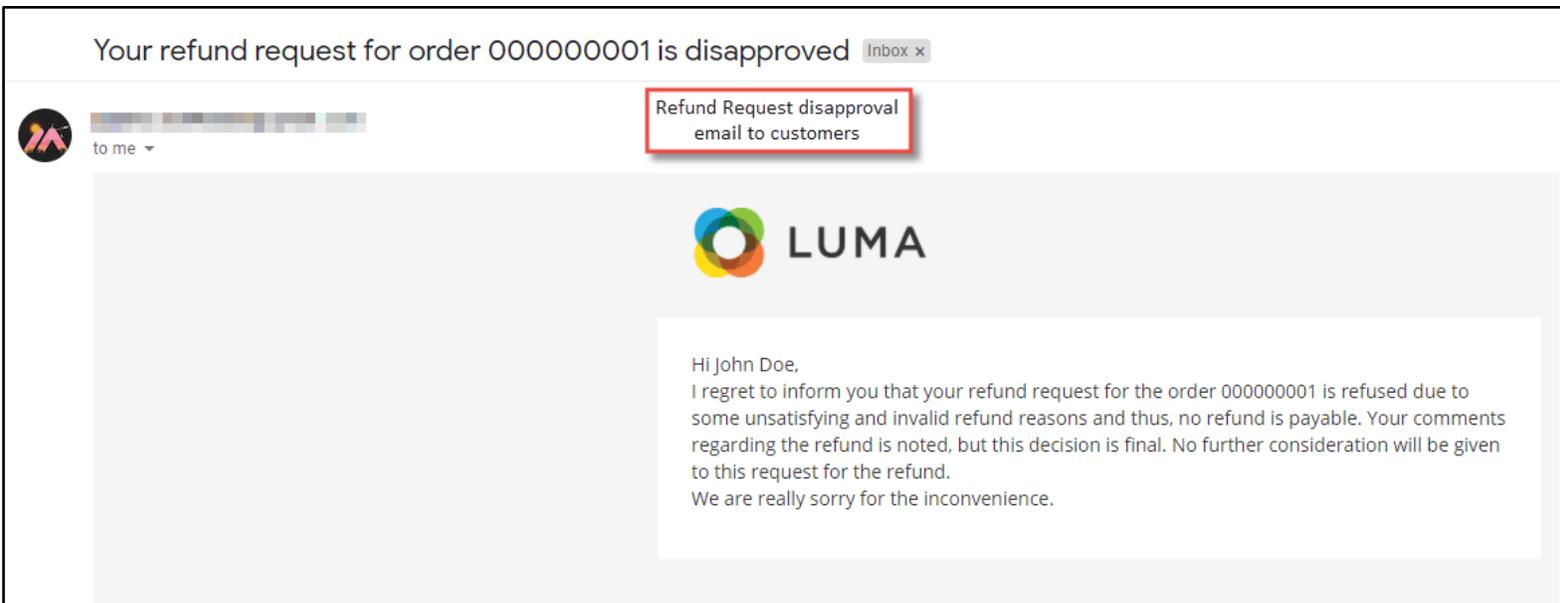
Refund Request approval email to customers



Hi John Doe,  
we just wanted to let you know that your refund request for the order 000000002 is approved. We will process refund soon and it should take between 7 to 10 business days for the refund to be processed. We sincerely hope that you can find your way back to Main Website Store someday, and please let us know if there is any way we can improve our product to make it better!

- **Refund Request Disapproval Email to the Customers**

Immediately after the admin [disapproves](#) a customer's refund request, the customer gets notified for the refund request disapproval.



**Your refund request for order 000000001 is disapproved** Inbox x

[Redacted] to me ▾

Refund Request disapproval email to customers



Hi John Doe,  
I regret to inform you that your refund request for the order 000000001 is refused due to some unsatisfying and invalid refund reasons and thus, no refund is payable. Your comments regarding the refund is noted, but this decision is final. No further consideration will be given to this request for the refund.  
We are really sorry for the inconvenience.