

# Reassign Order extension for Magento2

## User Guide

version 1.0



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## 1. Introduction

The document is a User Guide for extension **Reassign Order** created for Magento2 websites. It describes the extension functionality and provides some tips for a quick start.

The purpose of the Reassign Order extension for Magento 2 is to help reassigning orders between or to customers' accounts.

Have you ever come to a situation when customer contacts you and says an order was placed using a wrong email address? Or customer has more than one account and wants to combine all orders into a single one? By default, Magento won't allow you to move orders between accounts or assign a guest's order to a registered account. The Reassign Order extension for Magento 2 helps to solve the issue. Now you are able to re-assign an order or multiple ones in bulk to an existing customer's account through backend.

Or you can set up the automatic assignment when a new order is placed on checkout. If guest has used an email address of an existing customer the order will be linked to that account automatically.

All the assignment history can be found in the order history section. The customer receives an email notification once order has been re-assigned.

## 2. Installation

### 2.1. System Requirements

The extension requires Magento 2.x

### 2.2. Installation

The extension is provided as a .zip archive with the source code and the installation instructions.

Unpack the source code into **/app/code/Itoris/Itoris\_ReassignOrder/** folder on your server. And run the following commands in the SSH console:

```
php bin/magento module:enable --clear-static-content Itoris_ReassignOrder  
php bin/magento setup:upgrade
```

Then log into Magento backend and flush cache in **System -> Cache Management -> Flush Magento Cache**

If you experience any issues with the extension installation please contact us here -

<https://www.itoris.com/contact-us.html>

### 2.3. License

The extension has full open source code. One license/purchase can be used on a single production Magento2 website and its development instances. The extension can be customized for the license owner needs. Redistribution of the extension or its parts is not allowed. Please read more details here -

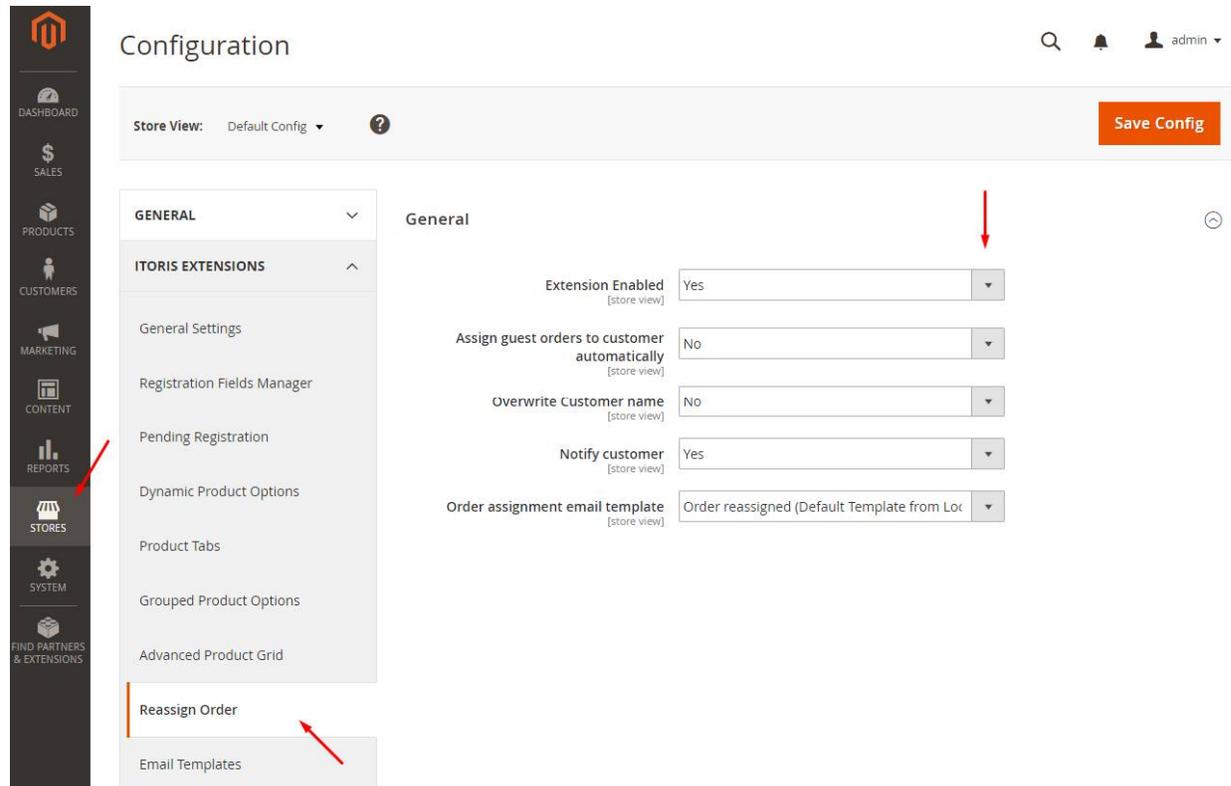
<https://www.itoris.com/magento-extensions-license.html>



## 3. How to Use

### 3.1. General Settings

You can find the general settings following **STORES -> Settings -> Configuration -> ITORIS EXTENSIONS -> Reassign Order**



The screenshot shows the 'Configuration' page for a store. The left sidebar contains navigation options: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The 'STORES' menu item is highlighted with a red arrow. The main content area is titled 'Configuration' and shows 'Store View: Default Config'. A 'Save Config' button is in the top right. The 'GENERAL' tab is selected, and the 'ITORIS EXTENSIONS' sub-tab is active. The 'Reassign Order' setting is highlighted with a red arrow. The settings are as follows:

Setting	Value
Extension Enabled [store view]	Yes
Assign guest orders to customer automatically [store view]	No
Overwrite Customer name [store view]	No
Notify customer [store view]	Yes
Order assignment email template [store view]	Order reassigned (Default Template from Loc

**Extension Enabled** – you can enable or disable the extension functionality.

**Assign guest orders to customer automatically** – by default the setting is disabled, i.e. if an existing customer with the same email places a guest's order, the order won't be reassigned to the customer account automatically. In dropdown choose "Yes" to reassign guest's orders to registered accounts automatically on checkout.

**Overwrite Customer name** – by default the setting is disabled. To override customer's name choose "Yes" in dropdown.

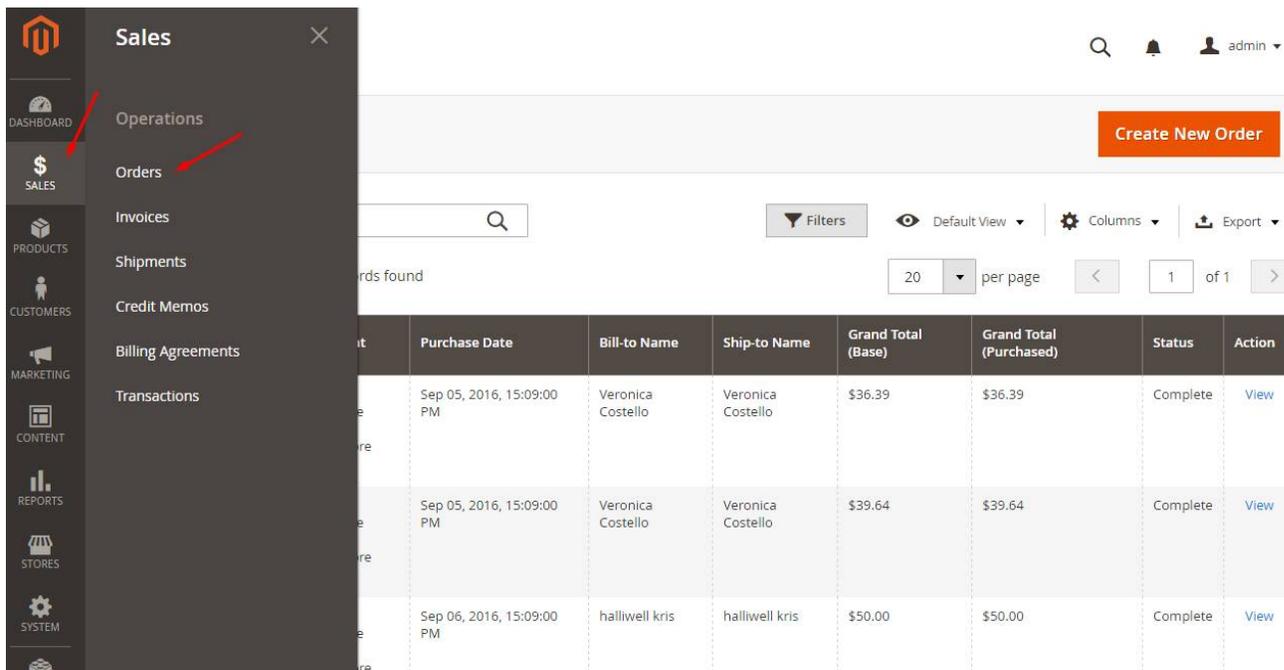
**Notify customer** – by default the setting is enabled. Your customer will be notified automatically by email about order reassignment.

**Order assignment email template** – by default the "Order reassigned" email template is set.

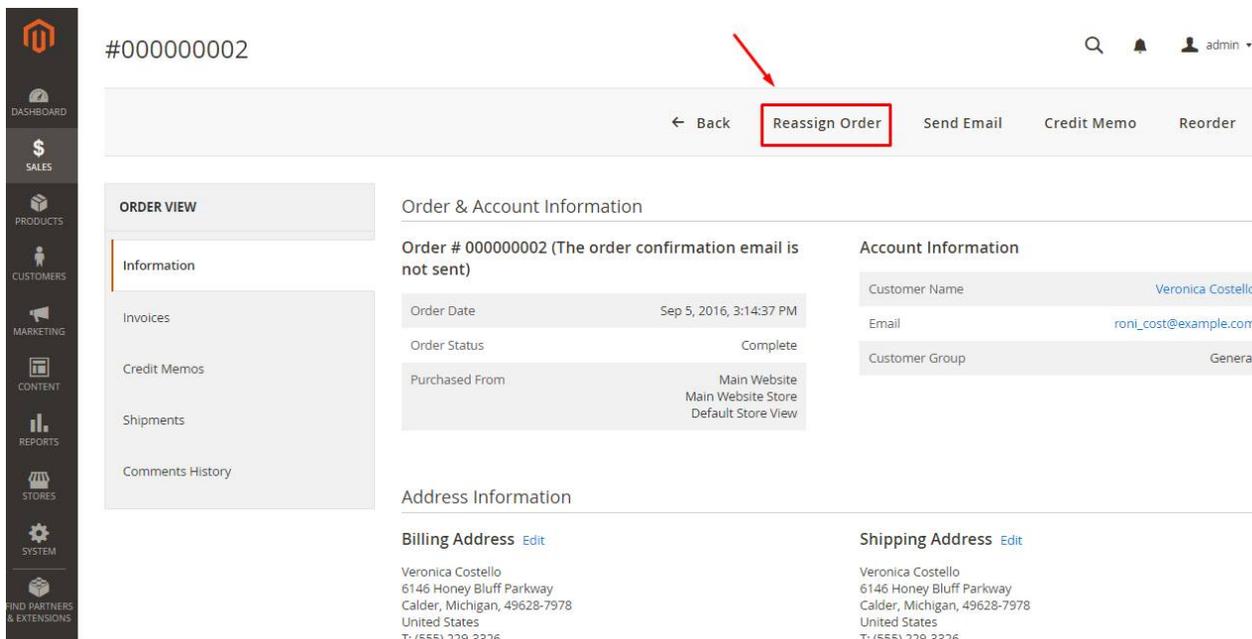


### 3.2. Reassign order

You can reassign orders following: **SALES -> Operations -> Orders -> {some order} -> View**



The extension allows to assign new orders by customer's email automatically on checkout or reassign order to another customer account manually from the backend.



In the customer's order information section click the "Reassign Order" button at the top of the page. The popup with the list of customers will appear. Here you can select a customer to reassign the order to. Choose the customer and click link "Select" next to the customer.



ID	Name	Email	Group	Website	Action
23	Liam Miller	liammiller619@gmail.com	General	Main Website	Select
21	Chris Foster	chrisfoster278@example.com	General	Main Website	Select
17	John Williams	johnwilliams@example.com	General	Main Website	Select
16	Oliver Black	oliverblack@example.com	General	Main Website	Select
15	Adam Horan	adamhoran@gmail.com	General	Main Website	Select
14	Kate Smith	smith@example.com	General	Main Website	Select
13	David Cooper	cooper_sales@example.com	General	Main Website	Select
12	Helen Foster	foster@example.com	General	Main Website	Select
11	Anna Adams	anadams@example.com	Retailer	Main Website	Select
10	John White	sales@gmail.com	Wholesale	Main Website	Select
1	Veronica Costello	roni_cost@example.com	General	Main Website	Select

In the appeared popup you can see two checkboxes. The extension allows to send email notifications and overriding the customer name while reassigning the order.

**Overwrite customer name** – by default this checkbox is not selected. You can check it and the customer name will be changed.

**Notify Customer** – the customer will be notified by email if you check this.

Finally click button "Assign" to reassign the order.

You are about to reassign order #000000002  
#000000002: Veronica Costello (roni\_cost@example.com) -> Liam Miller (liammiller619@gmail.com)

Overwrite customer name

Notify Customer

Assign Back

You can see that the customer name has been changed accordingly to the reassignment order settings in the "Account Information" section.



### 3.2.1 History Record

The extension provides details about reassignment in the order history section.

### 3.2.2 Reassign multiple orders

Using the extension you are able to assign multiple orders in bulk on the orders' list in the backend.

Action "Assign to Customer" will be added to the "Actions" dropdown. To assign multiple orders check some orders and choose "Assign to Customer" in dropdown. After the popup appears, select the customer you want to reassign orders to.



Orders Create New Order

5 records found (2 selected)

Actions

- Cancel
- Hold
- Unhold
- Print Invoices
- Print Packing Slips
- Print Credit Memos
- Print All
- Print Shipping Labels
- Assign to Customer

	Phase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>	Default Store							
<input type="checkbox"/>	Website in Website	Sep 06, 2016, 15:09:00 PM	halliwell kris	halliwell kris	\$50.00	\$50.00	Complete	<a href="#">View</a>
<input type="checkbox"/>	Default Store							
<input type="checkbox"/>	Website in Website	Sep 05, 2016, 15:09:00 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete	<a href="#">View</a>
<input type="checkbox"/>	Default Store							
<input checked="" type="checkbox"/>	Main Website Main Website Store	Sep 05, 2016, 15:09:00 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Complete	<a href="#">View</a>

### 3.2.3 Email Notification

After the order has been reassigned, the customer will get the notification by email. It will contain the information that the customer's order has been assigned to his account.

**Dear Liam Miller,**

Your order #000000002 that you placed on 2016-09-05 15:14:37 as Veronica Costello has been assigned to your account.

From now on you will be able to see your order under My Orders in My Account section.

With best regards, Main Website Store

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