

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





3. How to Use

3.1. General Settings

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

	Configuration			Q	🌲 🧘 admin 🗸
DASHBOARD SALES	Store View: Default Config 👻	0			Save Config
PRODUCTS	GENERAL	 General 		Ļ	6
	ITORIS EXTENSIONS	Extension Enabled	Yes	•	
	General Settings	Assign guest orders to customer automatically	No	•	
	Registration Fields Manager	Overwrite Customer name [store view]	No	•	
REPORTS	Pending Registration	Notify customer [store view]	Yes	T	
STORES	Product Tabs	Order assignment email template [store view]	Order reassigned (Default Template from Loc	•	
SYSTEM	Grouped Product Options				
FIND PARTNERS & EXTENSIONS	Advanced Product Grid				
	Reassign Order				
	Email Templates				

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

Ŵ	Sales	×					Q	<u> </u>	admin 🔻
CA DASHBOARD	Operations							Create New O	Order
\$ SALES	Orders								
ŵ	Invoices		Q		Filt	ers O Def	ault View 👻 🙀 Colu	umns 👻 📩	Export 🔻
PRODUCTS	Shipments	rds fo	ound			20	✓ per page <	1 of	1 >
CUSTOMERS	Credit Memos								
	Billing Agreements	ıt	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
	Transactions	e re	Sep 05, 2016, 15:09:00 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Complete	View
		e	Sep 05, 2016, 15:09:00 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete	View
STORES		ire							
SYSTEM		e	Sep 06, 2016, 15:09:00 PM	halliwell kris	halliwell kris	\$50.00	\$50.00	Complete	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.

Ŵ	#00000002				Q 🏚 💄 admin 🔹
DASHBOARD SALES			← Back Reassig	n Order Send Email	Credit Memo Reorder
PRODUCTS	ORDER VIEW	Order & Account Inform	nation		
CUSTOMERS	Information	Order # 000000002 (The not sent)	order confirmation email is	Account Information	Veronica Costello
	Invoices	Order Date	Sep 5, 2016, 3:14:37 PM	Email	roni_cost@example.com
	Credit Memos	Order Status Purchased From	Complete Main Website Main Website Store Default Store View	Customer Group	General
REPORTS	Snipments Comments History	Address Information			
SYSTEM SYSTEM FIND PARTNERS & EXTENSIONS		Billing Address Edit Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326		Shipping Address Edit Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	

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.





)) a	#000	Search Reset Filter	11 records found		20 🔻	per page 🔇	X	🌲 上 admin 🔹
IBOARD		ID t	Name	Email	Group	Website	Action	mo Reorder
		From			-	•		
	ORDER	То						
	-	23	Liam Miller	liammiller619@gmail.com	General	Main We <mark>b</mark> site	Select	
	Inform	21	Chris Foster	chrisfoster278@example.com	General	Main Website	Select	
		17	John Williams	johnwilliams@example.com	General	Main Website	Select	Veronica Costello
	Invoice	16	Oliver Black	oliverblack@example.com	General	Main Website	Select	roni_cost@example.com
	Credit	15	Adam Horan	adamhoran@gmail.com	General	Main We <mark>b</mark> site	Select	General
		14	Kate Smith	smith@example.com	General	Main Website	Select	
	Shipm	13	David Cooper	cooper_sales@example.com	General	Main Website	Select	
	Comm	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	
R5 IS		L	United States T: (555) 229-3326			United Stat T: (555) 229	es 1-3326	

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.

Cashboard Sales	#00000002: Ve Wou are about to #000000002: Ve Overwrite custo Notify Customer) reassign order #000000002 ronica Costello (roni_cost@example.com) -> mer name -	Liam Miller (liammiller619@gmail.com)		×
PRODUCTS	ORD Assign	Back			
Å	Information	Order # 00000002 email is not sent)	(The order confirmation	Account Information	
CUSTOMERS				Customer Name	Ve
	Invoices	Order Date	Sep 5, 2016, 3:14:37 PM	Email	roni_cost
		Order Status	Complete	Customer Group	

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





Ŵ			← Back	Reassign Order	Send Email	Credit Memo	Reorder
DASHBOARD	✓ Email has been sent						
\$ SALES	✓ Order has been reassigned						
PRODUCTS	ORDER VIEW	Order & Account In	iformation				
CUSTOMERS	Information	Order # 000000002 (email is not sent)	The order con	firmation	Account Informa	tion	
	Invoices	Order Date	Sep 5, 20	016, 3:14:37 PM	Customer Name	liammille	Liam Miller
	Credit Memos	Order Status		Complete	Customer Group	indiritrinic	General
	Shipments	Purchased From	Mair Def	Main Website n Website Store ault Store View			
STORES	Comments History						
\$		Address Informatio	on				
SYSTEM		Billing Address Edit			Shipping Address	S Edit	

3.2.1 History Record

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

DASHBOARD	#00000002	← Back	Reassign Order	Send Email	Credit Memo	Reorder
SALES		Complete 🔻		Shipping & Har	ndling	\$5.00
PRODUCTS				Тах		\$2.64
,				Grand Total		\$39.64
CUSTOMERS			1	Total Paid		\$39.64
		Notify Customer by Email		Total Refunde	d	\$7.64
		 Visible on Storefront Submit Comment 		Total Due		\$0.00
REPORTS		Oct 15 2016 12:19:21 PM Comp	lete Customer Not			
STORES		Notified Order was manually reassigned to exi roni_cost@example.com to liammiller changed from Veronica Costello to Lia	isting customer, from r619@gmail.com. Name am Miller			

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.





rders	Ļ						Create Ne	ew Ore
Actions	5 records f	ound (2 selected)		Q .	• • •	1 20	• <	
Cancel Hold	hase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Actio
Unhold Print Invoices	efault Store							
Print Packing Slips Print Credit Memos Print All	Website in Website efault Store	Sep 06, 2016, 15:09:00 PM	halliwell kris	halliwell kris	\$50.00	\$50.00	Complete	Vie
Print Shipping Labels Assign to Customer Vie	Website in Website Default Store	Sep 05, 2016, 15:09:00 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete	Vie
000000001 Ma Sto	ain Website Main Website ore Default Store ew	Sep 05, 2016, 15:09:00 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Complete	Vie

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
o recent chats	

