

Reassign Order extension for Magento

User Guide

version 2.0

Contents

1. Introduction	3
2. Installation	3
2.1. System Requirements	3
2.2. Installation.....	3
2.3. License.....	3
3. How to Use.....	4
3.1. General Settings	4
3.2 Reassign order.....	5
3.2.1 History Record.....	7
3.2.2 Reassign multiple orders	7
3.2.3 Email Notification	8

1. Introduction

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

The extension official page - <https://www.itoris.com/magento-assign-order.html>

The purpose of the Reassign Order extension for Magento is to reassign orders between or to customers' accounts. By default, Magento doesn't allow moving orders between accounts or assign a guest order to an existing account. The Reassign Order extension for Magento allows the admin to associate guest orders with the registered accounts on checkout automatically, reassign multiple orders to the customers manually in the Backend. Once a new order is placed on checkout and the entered email matches the existing account, 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 the order has been reassigned.

2. Installation

2.1. System Requirements

The extension works under Magento from 1.4.x and higher.

The extension works with Apache 1.3.x and higher, PHP 5 or higher, Linux or IIS.

2.2. Installation

Download the extension installation zip package from your account at <https://www.itoris.com/> and unpack it to the root of your Magento site by (S)FTP. Then flush cache in your Magento backend following **System > Cache Management**.

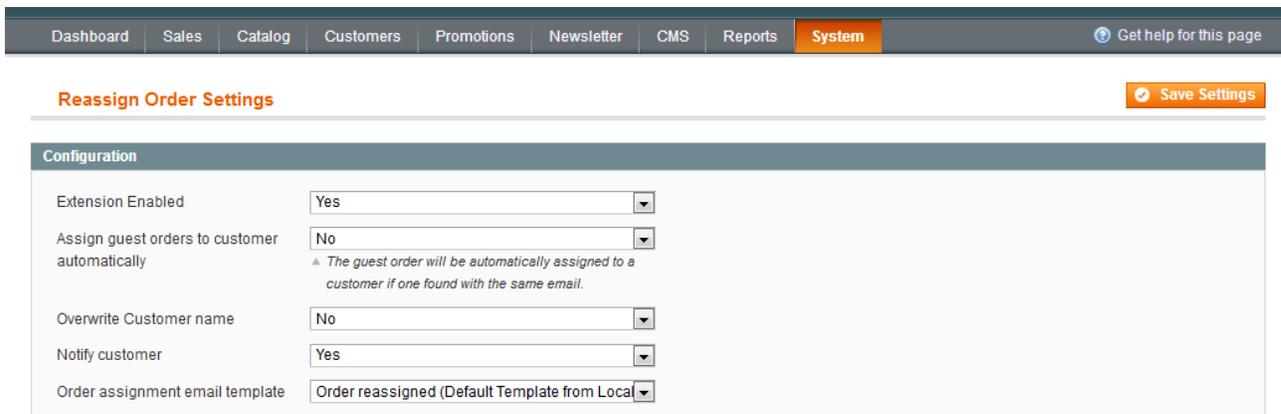
2.3. License

Please find the license agreement at <https://www.itoris.com/magento-extensions-license.html>

3. How to Use

3.1. General Settings

The general settings are available following **System > Itoris Extension > Reassign Order**.



Configuration	
Extension Enabled	Yes
Assign guest orders to customer automatically	No <small>▲ The guest order will be automatically assigned to a customer if one found with the same email.</small>
Overwrite Customer name	No
Notify customer	Yes
Order assignment email template	Order reassigned (Default Template from Local)

Extension Enabled – enables or disables 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 an order as a guest, the order won't be reassigned to the customer automatically. If option "Yes" is chosen, all guest orders will be reassigned to the existing customers automatically on checkout.

Overwrite Customer name – by default the setting is disabled. To overwrite a customer's name, option "Yes" should be selected.

Notify customer – the customers can be notified automatically by email about the reassigned order.

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

3.2 Reassign order

The extension allows assigning orders either automatically on checkout or manually in the Backend.

The admin can reassign orders following: **Sales > Orders > {select an order} > Reassign Order.**

After "Reassign Order" is chosen, the popup with the existing customers appears. Link "Select" allows choosing a particular customer the order should be reassigned to.

ID	Name	Email	Group	Website	Action
137	Liam Miller	liammiller619@gmail.com	General	Main Website	Select
136	Jane Doe	janedoe@example.com	General	Main Website	Select
135	John Doe	johndoe@example.com	General	Main Website	Select
127	John Smith	johnsmith@example.com	VIP Member	Main Website	Select
104	Drew France	drew@example.com	VIP Member	Main Website	Select
103	Milo Vitti	milo@example.com	Private Sales Member		Select
102	Erich Forbes	erich@example.com	General	Main Website	Select
101	Jerry Luke	jerry@example.com	VIP Member	Main Website	Select
100	Jane Smith	janesmith@example.com	VIP Member	Main Website	Select
99	Clay Lock	clay@example.com	General	Main Website	Select
98	Theo Porras	theo@example.com	General	Main Website	Select
97	Percy Pella	percy@example.com	Private Sales Member		Select
96	Kinley Than	kinley@example.com	Private Sales Member		Select
95	Dong Berg	dong@example.com	Wholesale	Main Website	Select
94	Seema Droz	seema@example.com	Wholesale	Main Website	Select
93	Tanja Melville	tanja@example.com	Wholesale	Main Website	Select
92	Kip Chee	kip@example.com	General	Main Website	Select

The following details are available in the popup:

Order ID – shows the order ID which should be reassigned to the customer.

Overwritten name and email – displays what email and user name should be overwritten.

Overwrite customer name – allows overwriting a customer’s name if the checkbox is marked.

Notify Customer – the customer will be notified automatically if the checkbox is marked.

Button “**Assign**” reassigns the order.

Order View | Order # 145000008 | Oct 9, 2018 7:36:05 AM

Information

- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

Order # 145000008 (the order confirmation email was sent)

Order Date	Oct 9, 2018 7:36:05 AM
Order Status	Complete

Account Information

Customer Name	liam miller
Email	salmiller@mail.com
Customer Group	NOT LOGGED IN

Reassign Order

You are about to reassign order #145000008

#145000008: liam miller (salmiller@mail.com) -> Liam Miller (liammiller619@gmail.com)

Overwrite customer name Notify Customer

[Assign](#) [Back](#)

Payment Information | **Shipping & Handling Information**

After the order has been reassigned, the information is changed in the "Account Information" section.

Order View

Information

- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

Order # 145000008 | Oct 9, 2018 7:36:05 AM

Order # 145000008 (the order confirmation email was sent)

Order Date	Oct 9, 2018 7:36:05 AM
Order Status	Complete
Purchased From	Main Website Madison Island English
Placed from IP	127.0.0.1

Account Information

Customer Name	Liam Miller
Email	liammiller619@gmail.com
Customer Group	General

Billing Address | **Shipping Address**

liam miller
1117 Madison Ave
New York, New York, 10028
United States
T: +1 212-262-8899

3.2.1 History Record

The extension allows collecting the detailed order history. The history record is added if the order is reassigned.

Item	Amount
Subtotal	\$375.00
Shipping & Handling	\$0.00
Tax	\$30.94
Grand Total	\$405.94
Total Paid	\$405.94
Total Refunded	\$0.00
Total Due	\$0.00

History

- Oct 9, 2018 7:42:40 AM | Complete
Customer Not Notified
Order was manually reassigned to existing customer, from salmiller@mail.com to liammiller619@gmail.com. Name changed from liam miller to Liam Miller
- Oct 9, 2018 7:36:48 AM | Complete
Customer Notified ✓
- Oct 9, 2018 7:36:38 AM | Processing
Customer Notified ✓
- Oct 9, 2018 7:36:05 AM | Pending
Customer Notified ✓

3.2.2 Reassign multiple orders

The extension allows the admin to assign multiple orders at once. Action "Assign to Customer" is added to the "Actions" dropdown. After the popup appears, the admin can choose the customer to reassign the orders to.

Reassign Order

You are about reassign orders #145000007, #145000003, #100000206

- #145000007: liam miller (liammiller619@gmail.com) -> Liam Miller (liammiller619@gmail.com)
- #145000003: Jay Smith (jj@example.com) -> Liam Miller (liammiller619@gmail.com)
- #100000206: John Doe (johndoe@example.com) -> Liam Miller (liammiller619@gmail.com)

Overwrite customer name Notify Customer

Order #	Purchase	Status	Action
145000008	Main Website Madison Island English	Complete	View
145000007	Main Website Madison Island English	Pending	View
145000006	Main Website Madison Island English	Complete	View
145000004-1	Main Website Madison Island English	Canceled	View

3.2.3 Email Notification

After the order has been reassigned, the customer gets the notification by email. It contains the information about the successful reassignment.

