



Magento 1 Switch Order Owner



Quick Start Guide



1. Introduction

Switch Order Owner extension allows admin to switch ownership of order from the backend. Admin can easily modify an existing order's customer information. This extension enables -

- To change order owner that was placed as a guest to any customer.
- To change the owner of any order from one customer to another customer.
- To change owner of multiple orders to any customer using mass action.
- To see history of changed owner of orders.
- Ability of sending email to customer while changing owner of the order and also sends same copy of email to admin.
- Support Magento community version 1.5.x and later.
- The extension comes with 100% open source which means there are no encoded files available, everything is transparent and you can modify source of this extension to meet your needs.

2. Features

Following are the list of features of switch order owner module -

1. Allow admin to switch order owner from one customer to another, from order detail page.
2. Multiple or single order can be selected from the grid to switch the ownership at a time using mass action.
3. A pop-up box will be appeared when switch order owner action trigger having a dropdown of stores and customers. On changing the store, customers will be loaded dynamically. These dropdown includes search box so that the admin can easily search for stores & customers.
4. Allow admin to switch ownership of guest order to any registered customer.
5. Admin have the option to overwrite customer name and billing/shipping address as well while switching ownership of order. Configuration settings are given to enable/disable it.
6. On switching order owner, email notification sends to the customer and also send copy to admin. System configuration settings are given to enable/disable email notification and to set comma separated email for admin.
7. Admin can view the history of ownership changes made corresponding to the order on order details page.
8. Configuration added to choose order status. Orders with these selected status are not allowed to switch ownership. For example orders having canceled, closed status are not applicable to switch order ownership if selected from the configuration.
9. An order placed from one website cannot be assigned to the customer of another website. In Magento default configuration, If account sharing option is set to "Website" then only this restriction applied. If it is set to "Global" then this restriction won't be



applicable.

3. Installation

Installation Requirements:

1. Magento 1 installed on the hosting server.
2. Access to the Magento Admin dashboard.

Installation Steps:

1. Download extension package from marketplace.
2. Login to the Magento admin.
3. Access Magento Connect Manager, upload extension package there and install it.

Installation Troubleshooting:

4. It is highly recommended to backup your server files and database before installing this module.
5. Disable compilation mode(if enabled).
6. After installation logout and login again to Magento.
7. Clear Magento cache.
8. Clear the store cache under var/cache and all cookies for your store domain
9. Check that Magento has permissions to read extensions files.

Using the Magento Admin Panel:

1. Login to the Magento Admin Panel.

The screenshot shows the Magento Admin Panel login interface. On the left, there is a vertical 'Magento' logo. The main content area has a light blue background with a white box containing the login form. The form title is 'Log in to Admin Panel'. Below the title, there are two input fields: 'User Name:' with the value 'admin' and 'Password:' with masked characters. A link for 'Forgot your password?' is located below the user name field. A 'Login' button is positioned to the right of the password field. At the bottom of the form, a copyright notice states: 'Magento is a trademark of Magento Inc. Copyright © 2017 Magento Inc.'

2. Click through to [System -> Magento Connect -> Magento Connect Manager]. There you need to upload extension package for installation.



Magentoconnect MANAGER

Extensions Settings [Return to Admin](#) [Log Out](#)

Settings

Put store on the maintenance mode while installing/upgrading/backup creation
 Create Backup Database

Install New Extensions

1 Search for modules via [Magento Connect](#).
2 Paste extension key to install: [Install](#)

Direct package file upload

1 Download or build package file.
2 Upload package file: No file chosen [Upload](#)

Manage Existing Extensions

[Check for Upgrades](#)

Channel: Magento Community Edition [Commit Changes](#)

3. Click through to [System -> Cache Management].

Cache Storage Management

[Flush Magento Cache](#) [Flush Cache Storage](#)

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

Cache Type	Description	Associated Tags	Status
<input type="checkbox"/> Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).	CONFIG	DISABLED
<input type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	DISABLED
<input type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	DISABLED
<input type="checkbox"/> Translations	Translation files.	TRANSLATE	DISABLED
<input type="checkbox"/> Collections Data	Collection data files.	COLLECTION_DATA	DISABLED
<input type="checkbox"/> EAV types and attributes	Entity types declaration cache.	EAV	DISABLED
<input type="checkbox"/> Web Services Configuration	Web Services definition files (api.xml).	CONFIG_API	DISABLED
<input type="checkbox"/> Web Services Configuration	Web Services definition files (api2.xml).	CONFIG_API2	DISABLED

Additional Cache Management

[Flush Catalog Images Cache](#) Pregenerated product images files.
[Flush Swatch Images Cache](#) Pregenerated configurable swatches image files.
[Flush JavaScript/CSS Cache](#) Themes JavaScript and CSS files combined to one file.

4. In the top right hand corner, select "Refresh" from the dropdown. And in top left corner click to "Select All". Next to the dropdown where you selected "Refresh", click on the "Submit" button. After completing these steps, Extension is successfully installed.



Other Details:

1. Compatibility: Community edition - 1.5x 1.6x, 1.7x, 1.8x, 1.9x.
2. Version number: 1.0.1
3. Stability: Stable
4. Support for extension - Available
5. Demo - Not available
10. Developed By - InfoBeans Technologies Limited

4. Switch Order Owner Configuration

After installation you have the control for switching order owner.

Configuration:

1. Login to your Magento 1 admin panel.
 2. Navigate to System>>>Configuration>>>Infobeans Extensions >>>Switch Order Owner.
- All relevant settings are available there.

The screenshot displays the Magento Admin Panel interface for the 'Switch Order Owner' configuration. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', and 'System'. The left sidebar shows a tree view of configuration categories: Configuration (GENERAL, Web, Design, Currency Setup, Store Email Addresses, Contacts, Reports, Content Management), CATALOG (Catalog, Configurable Swatches, Inventory, Google Sitemap, RSS Feeds, Email to a Friend), INFOBEANS EXTENSIONS (Switch Order Owner), CUSTOMERS (Newsletter, Customer Configuration, Wishlist, Promotions, Persistent Shopping Cart), MAGEPSYCHO EXTENSIONS (Easy Template Path Hints, Info), and SALES (Sales, Sales Emails, PDF Print-outs). The main content area is titled 'Switch Order Owner' and features a 'Save Config' button. It is divided into four sections: 'Order Settings' with a dropdown for 'Select Order Status' (options: Canceled, Closed, Complete, Suspected Fraud, On Hold, Payment Review, PayPal Canceled Reversal, PayPal Reversed, Pending, Pending Payment); 'Override Settings' with 'Enabled Billing/Shipping Address Overwrite' and 'Enabled Customer Name Overwrite' both set to 'Yes'; 'Customer Notification' with 'Enabled' set to 'Yes', 'Email Sender' set to 'Sales Representative', and 'Switch Order Owner Notification Template' set to 'Switch Order Owner - Customer Notification (De)'; and 'Enable jQuery' set to 'Yes'.

WF 001: Switch order owner configuration.



Steps to Switch Owner of Order:

1. After successful setup, Go to Sales >>>Orders grid page. There you can change owner of multiple orders at a time. To switch owner, first select orders and from “Actions” dropdown select “Switch Order Owner”. Then click on “Submit” button.

Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action
100000007	Main Website Main Website Store Default Store View	Jul 12, 2016 5:31:42 AM	Chris Coachen	Chris Coachen	\$190.00	\$190.00	Pending	View
100000006	Main Website Main Website Store Default Store View	Jul 12, 2016 5:20:50 AM	Chris Coachen		\$65.00	\$65.00	Pending	View

WF 002: Sales order grid, mass action to switch order owner

2. You can also switch order owner from order details page.

Order # 100000007 | Jul 12, 2016 5:31:42 AM

Order # 100000007 (the order confirmation email was sent)

Order Date: Jul 12, 2016 5:31:42 AM
Order Status: Pending
Purchased From: Main Website
Main Website Store
Default Store View
Placed from IP: 127.0.0.1

Account Information
Customer Name: Chris Coachen
Email: chris.44.55@gmail.com
Customer Group: General

Billing Address: Chris Coachen, IB, 1 main street, Indore, Madhya Pradesh, 452078, India, T: 1234563333

Shipping Address: Chris Coachen, IB, 1 main street, Indore, Madhya Pradesh, 452078, India, T: 1234563333

Payment Information
Check / Money order
Order was placed using USD

Shipping & Handling Information
Flat Rate - Fixed \$5.00

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Test simple SKU: test123	Ordered	\$120.00	\$120.00	Ordered 1	\$120.00	\$0.00	0%	\$0.00	\$120.00

WF 003: Sales order details, button to switch order owner

3. On clicking “Submit” button a pop-up box gets open. There you can filter and select customers or new owner of order.
4. The pop-up box also has the option to notify new order owner and admin.



The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with 'Sales' highlighted. Below it, a 'Latest Message' banner is visible. The main content area displays an 'Orders' table with columns for Order #, Purchased From (Store), Purchased On, Bill to Name, Ship to Name, G.T. (Base), G.T. (Purchased), Status, and Action. A pop-up window titled 'Switch Owner Confirmation' is overlaid on the table. It contains two dropdown menus: 'Select Store' and 'Select Customer'. Below these is a checkbox labeled 'Notify New Owner & Send Copy To Admin' which is checked. At the bottom of the pop-up are two buttons: 'Switch Owner' and 'Cancel'.

WF 004: Pop-Up box having store/customer dropdown and option to overwrite owner name and notify.

5. After clicking on “Switch Owner” button, order’s customer information like customer name, billing/shipping address, email gets changed.
6. Admin can check switch order owner history from order details page.

The screenshot shows the 'Order View' page for Order # 100000007, dated July 12, 2016, 5:31:42 AM. The left sidebar contains a navigation menu with 'Switch Owner History' selected. The main content area displays a table titled 'Order Owner Switched To' with columns: Order Owner Switched To, Owner Switched By, Customer Notified, and Time. The table lists multiple entries of owner switches, including 'Tehmina11 Ansari', 'John deo', and 'Chris Coachen', all switched by 'admin'. The 'Customer Notified' column shows green checkmarks for most entries and red X's for some. The 'Time' column shows the date and time of each switch.

WF 005: History of order owner switch.

7. Notification will be sent to new order owner and admin.



Dear test user6,

This is to inform that order #100000135 placed on April 25, 2013 4:11:25 PM PDT by Dong Berg . Now its owner has been switched to you.

You can check the order details under [My Orders](#) in [My Account](#) section.

Thank You, **Madison Island**

WF 006: Notification to new owner.