

Assign Order To Customer



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1. Overview

Assign Order to Customer extension allows you to assign any order or multiple orders to specific customer. Admin can easily assign any order from one customer to another customer or can also assign order that was placed as guest to any customer. Admin can also assign multiple orders to any customer using mass action. Admin can see history of assigned orders and also have the ability to rollback the assignment of orders. Admin can have the ability of overwrite customer name and also send email to customer while assigning order to customer.

2. Installation

1. Unpack the extension ZIP file on your computer.
2. Connect to your website source folder with FTP/SFTP/SSH client and upload all the files and folders from the extension package to the corresponding root folder of your Magento installation.
3. Open your usual SSH program and go to the main directory of your website.
4. Run the command “php bin/magento module:enable --clear-static-content Magebright_Assignorder” to enable the module and clear static contents generated by Magento.
5. Run the command “php bin/magento setup:upgrade” to upgrade the Magento application and database.
6. Flush Magento caches by executing the command “php bin/magento cache:flush”.

3. Back-end Settings

Admin can easily enabled/disabled this extension from Admin >> Configuration >> Magebright >> Assign Order To Customers Setting >> Enable.

Admin can also set Sender Address, Recipient Address and Assign Order Notification Template as per shown below image.

The screenshot shows the 'Configuration' page in the Magento admin interface. The left sidebar contains navigation menus for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and shows the 'Assign Order To Customers Setting' for the 'Default Config' store view. A 'Save Config' button is visible in the top right. The settings are organized into sections: GENERAL, CATALOG, MAGEBRIGHT, and ADVANCED. The 'Assign Order To Customers' setting is expanded, showing the following options:

- Enabled:** A dropdown menu set to 'Yes'. A red box with an arrow points to it, containing the text: "Admin can enabled/disabled this module from here."
- Sender Address:** A dropdown menu set to 'General Contact'. A red box with an arrow points to it, containing the text: "Set notification sender address by admin."
- Recipient Address:** A text input field. A red box with an arrow points to it, containing the text: "Send notification email to specific user by adding email address to here."
- Assign Order Notification Template:** A dropdown menu set to 'Assign To Customer Notification (Default)'. A red box with an arrow points to it, containing the text: "Admin can easily set notification template easily from here."

Each setting has a '[STORE VIEW]' label to its right. The 'Assign Order To Customers' setting is highlighted with an orange border in the left sidebar.

Admin can assign multiple orders to any customer from order grid mass action as per shown below image.

The screenshot displays the 'Orders' management interface. On the left is a sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, and System. The main area shows a table of orders with columns: Purchase Point, Purchase Date, Bill-to Name, Ship-to Name, Grand Total (Base), Grand Total (Purchased), Status, and Action. Two records are shown, both with a status of 'Pending'. A context menu is open over the first record, listing actions such as 'Assign To Customer', 'Cancel', 'Hold', 'Unhold', 'Print Invoices', 'Print Packing Slips', 'Print Credit Memos', 'Print All', and 'Print Shipping Labels'. A red box highlights the 'Assign To Customer' option, with a red arrow pointing to it and the text 'Admin can easily assign multiple orders from order mass grid option.' The interface also includes a search bar, filters, a 'Create New Order' button, and pagination controls.

Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
Online Website Main Website e Default Store	Jun 30, 2016 1:07:18 AM	Magebright Developer2	Magebright Developer2	\$205.00	\$205.00	Pending	View
Online Website Main Website e Default Store	Jun 28, 2016 5:20:57 PM	Magebright Developer	Magebright Developer	\$105.00	\$105.00	Pending	View

Admin can also assign any order to any customer from order view page as per shown below image.

#000000001

Admin can assign order from order view page

← Back Cancel Send Email Hold Invoice Ship Reorder **Assign To Other Customer** Edit

ORDER VIEW

- History of Assignment
- Information**
- Invoices
- Credit Memos
- Shipments
- Comments History

Order & Account Information

Order # 000000001 (The order confirmation email was sent)

Order Date: Jun 28, 2016, 5:20:57 PM

Order Status: Pending

Purchased From: Main Website, Main Website Store, Default Store View

Placed from IP: ::1

Account Information

Customer Name: Magebright Developer

Email: magebright.developer@gmail.com

Customer Group: General

Address Information

Billing Address [Edit](#)

Magebright Developer
Abc Harbour
abc city, New York, 10010
United States
T: 123456

Shipping Address [Edit](#)

Magebright Developer
Abc Harbour
abc city, New York, 10010
United States
T: 123456

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using USD.

Shipping & Handling Information

Flat Rate - Fixed \$5.00

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Test Product1 SKU: Test Product1	Ordered	\$100.00	\$100.00	Ordered 1	\$100.00	\$0.00	0%	\$0.00	\$100.00

Order Total

Notes for this Order

Status: Pending

Comment:

Notify Customer by Email

Visible on Storefront

Submit Comment

Order Totals

Subtotal	\$100.00
Shipping & Handling	\$5.00
Grand Total	\$105.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$105.00

Admin can assign any order or multiple orders to any customer from this “Assign Order To Customer” grid as per shown below image.

The screenshot shows the 'Assign Order #000000001 To Customer' page. A sidebar on the left contains navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, and Stores. The main content area has a search bar and a grid of customer records. A red box highlights the grid with the text 'Admin can assign order from this "Assign Order To Customer" grid.' The grid has columns for ID, Name, Email, Group, Telephone, ZIP, Country, State/Province, and Customer Since. Two records are visible:

ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since
4	Magebright Developer2	magebright.developer2@gmail.com	General			All Countries		Jun 30, 2016, 1:03:10 AM
2	Magebright Developer1	magebright.developer1@gmail.com	General					Jun 28, 2016, 5:25:35 PM

Admin can see pop up when clicked on any customer from “Assign Order To Customer” grid as per shown below image.

Admin can overwrite customer name or notify customer by sending email by selecting relative checkbox in pop up.

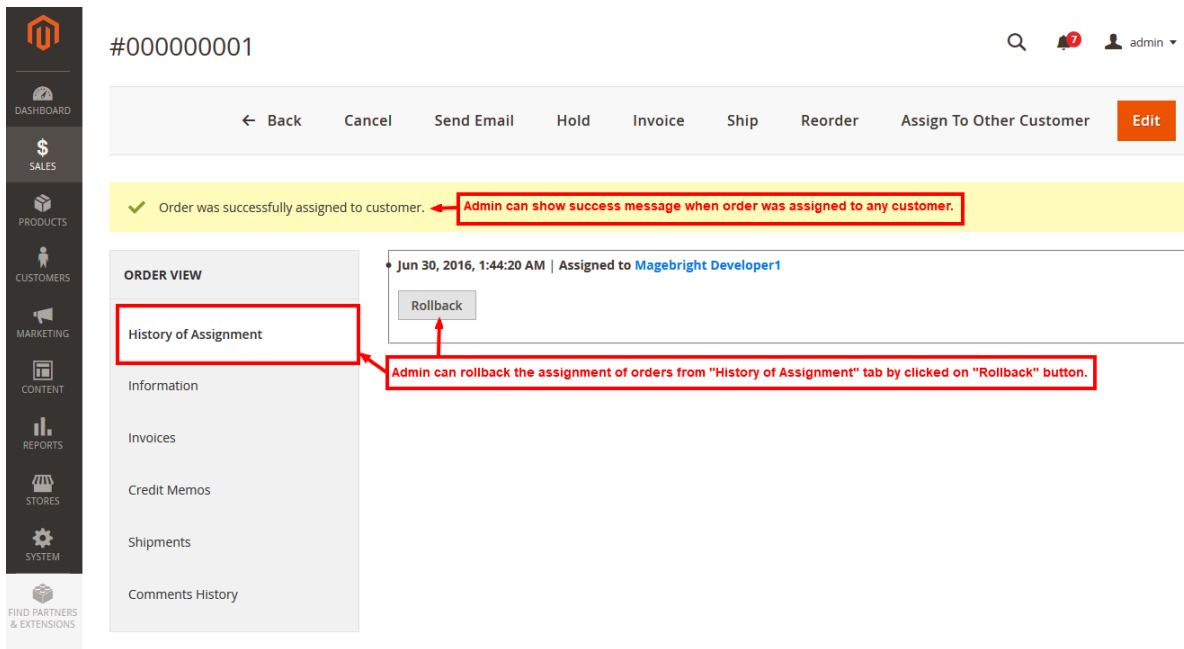
The screenshot shows the same 'Assign Order #000000001 To Customer' page, but with a modal popup open. The popup contains the following information:

- Order: #000000001
- Magebright Developer1
- magebright.developer1@gmail.com
- Overwrite Customer Name
- Notify Customer

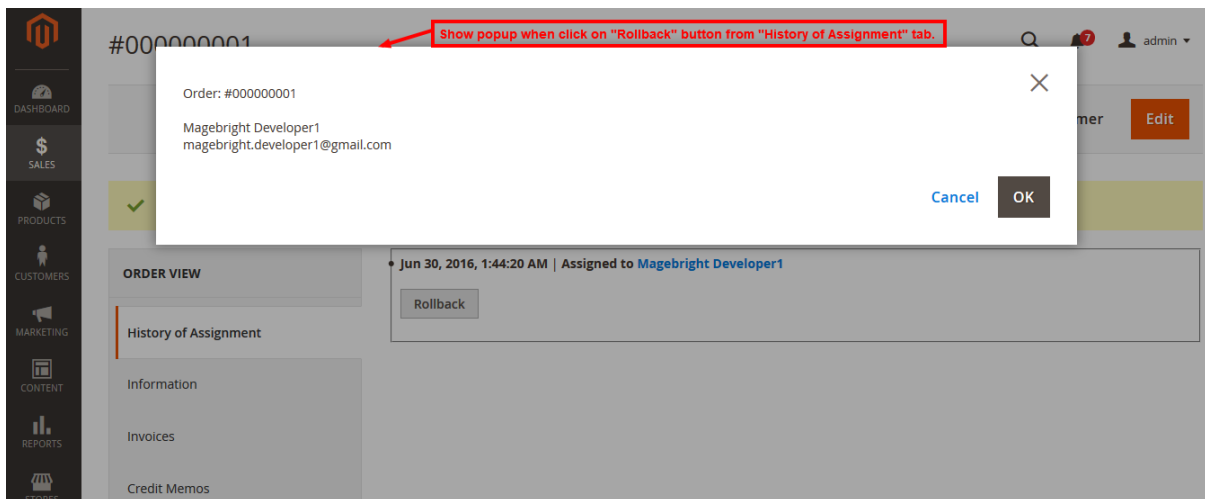
Buttons for 'Cancel' and 'OK' are at the bottom right of the popup. A red box highlights the 'Overwrite Customer Name' checkbox with the text 'Admin can overwrite customer name or notify customer by selecting relative checkbox in pop up.' Another red box at the top of the popup says 'Show popup when assign to any customer'.

Admin can see all history of assigned orders in “History of Assignment” tab in order view page as per shown below image.

Admin can also rollback the assignment of orders from this tab by clicked on “Rollback” button.



Admin can see rollback pop up when clicked on “Rollback” button in “History of Assignment” tab in order view page as per shown below image.



4. Support

If you need any kind of support or customization email us on this email id support@magebright.com.

Thank You