Transfer Order

for Magento 2

User Guide

Version 1.0

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I) Introduction

Magento 2 Transfer Order allows you to move orders from one customer account to another. This extension gives customers the ability to create transfer order requests right from the frontend. Moreover, it lets you manage all transfer order requests on the backend.

- Create transfer order requests
- Allow customers to view all their transfer order requests
- Change transfer order request status
- Set notification emails for admin and customers
- Manage transfer order requests efficiently from the backend

II) Where to Find Extension

1. Transfer Order Extension in the Backend

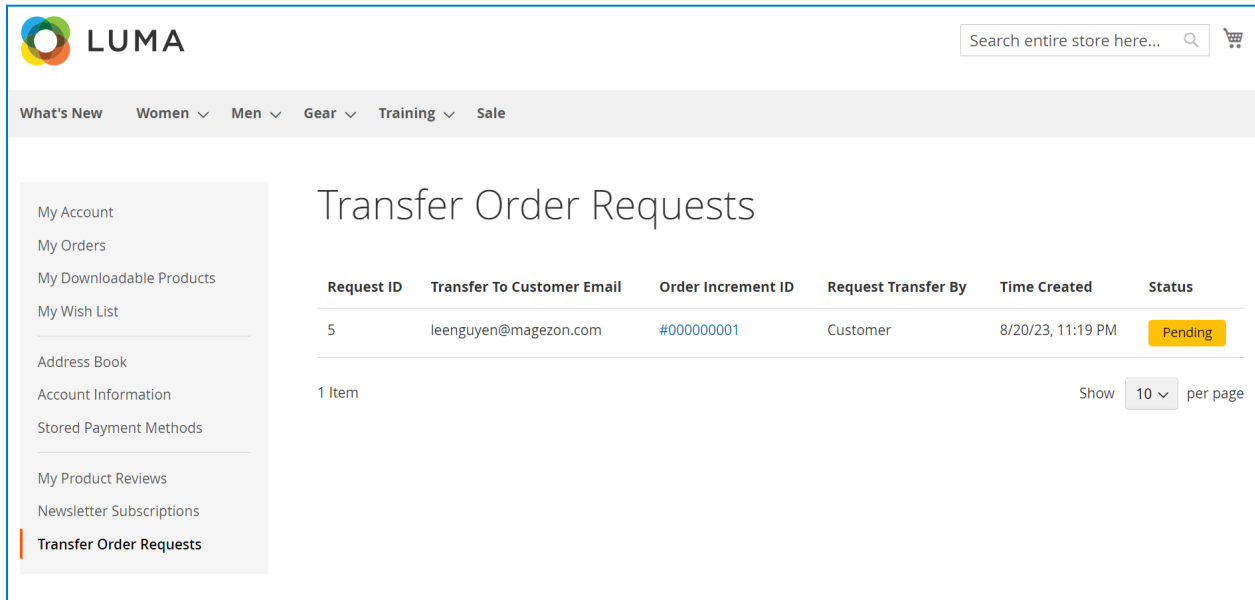After installing the extension, navigate to **Stores > Settings > Configuration**:
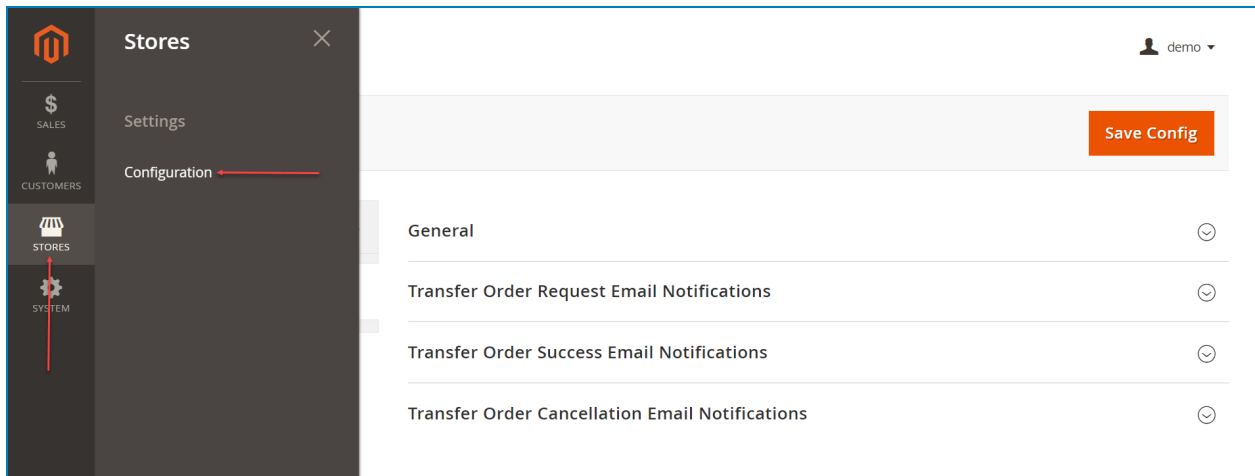
In the left panel, span **MAGEZON EXTENSIONS** and click **Transfer Order**. In the right section, there are 4 tabs: General, Transfer Order Request Email Notifications, Transfer Order Success Email Notifications, and Transfer Order Cancellation Email Notifications.
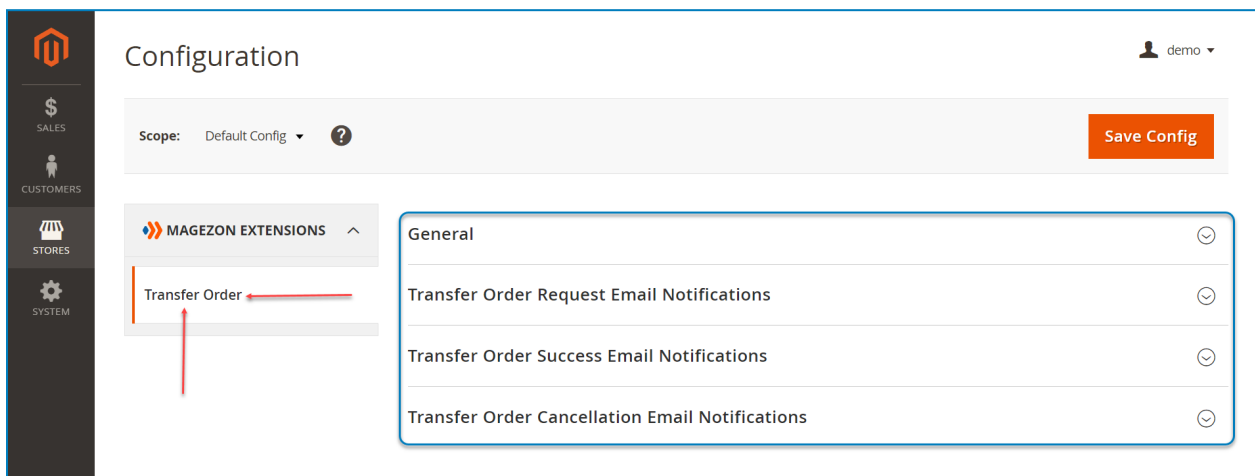
2. Transfer Order Extension in the Frontend

In the frontend, customers can view their transfer order requests on the **Transfer Order Requests** page in their account dashboard:
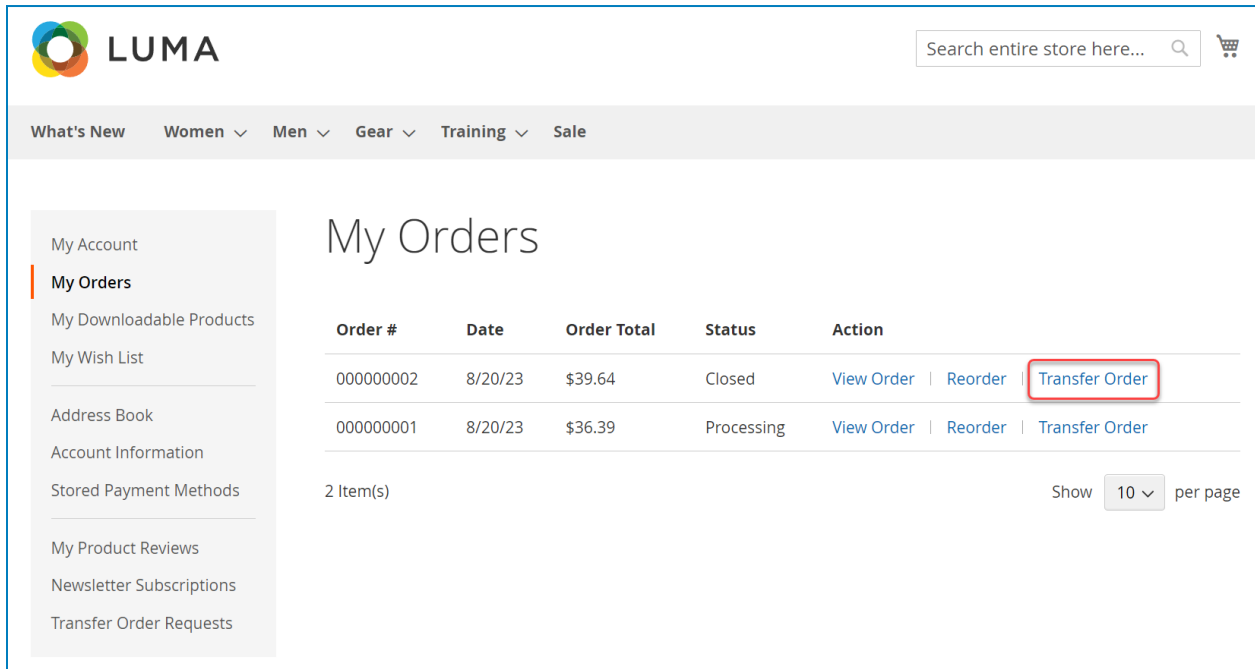
Customers can view their orders on the **My Orders** page and add new transfer order requests here:

Or view the order details and create new transfer order requests here:

Simply click on the **Transfer Order** button, then a modal will appear. Customers need to enter the account email address to transfer the order to.

III) Configuration

Note: When you want to adjust any option, you have to uncheck **Use system value**.

1. General

This section contains general settings for the extension:
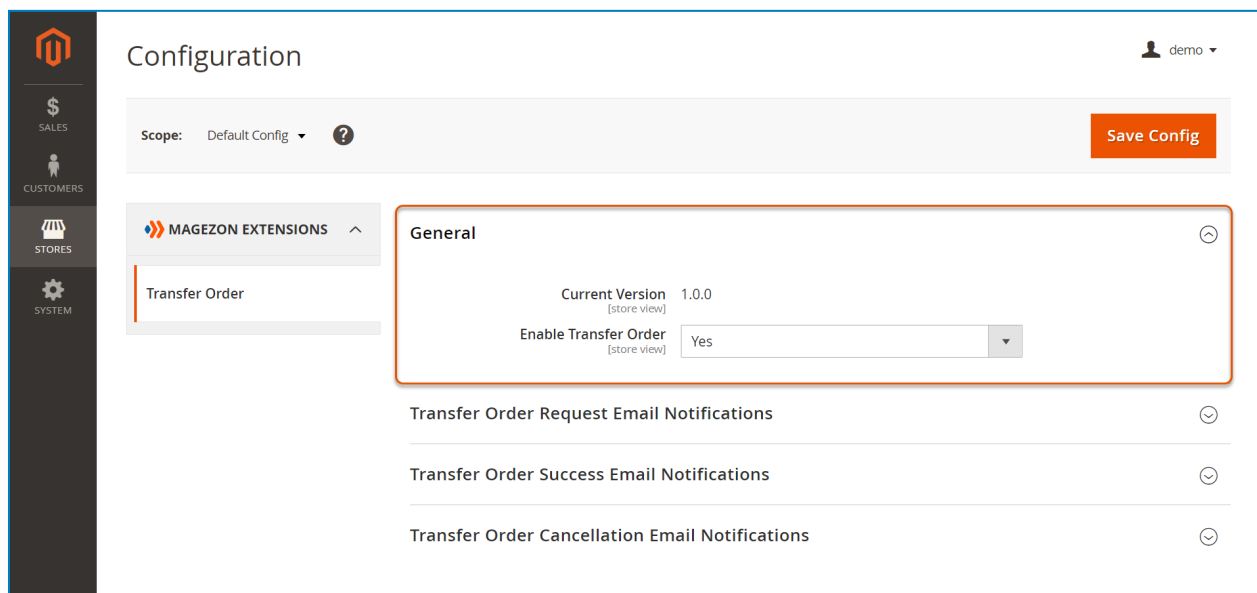
- **Current Version:** let you know the current version of the extension.

- **Enable Transfer Order**: select Yes/No to enable/disable the extension on your website.

2. Transfer Order Request Email Notifications

This section allows you to manage email notifications that will be sent to the admin and customers when a new transfer order is created by customers:

Transfer Order Request Email Notifications

Enable [store view]	Yes	☑ Use system value
Email Sender [store view]	General Contact	☑ Use system value
Send Emails To [store view]	chiennq@magezon.com	

When a customer creates a new transfer order request successfully, an email will be sent to these addresses. You can add multiple email addresses separated by commas.

Email Template for Send Emails To [store view]	Transfer Order Request (Default)	☑ Use system value

Select a template for the email that will be sent to addresses that you enter in the Send Emails To field to notify a new transfer order request created by the customer.

Email Template for Customer [store view]	Transfer Order Request For Customer From (	☑ Use system value

Select a template for the email that will be sent to the customer after he/she creates a new transfer order request successfully.

- **Enable:** select Yes/No to enable/disable this feature.
- **Email Sender:** define the email that will be used to send email notifications.
- **Send Emails To:** when a customer creates a new transfer order request successfully, an email will be sent to these addresses. You can add multiple email addresses separated by commas.
- **Email Template for Send Emails To:** select a template for the email that will be sent to addresses that you enter in the Send Emails To field to notify a new transfer order request created by the customer.

- **Email Template for Customer:** select a template for the email that will be sent to the customer after he/she creates a new transfer order request successfully.

3. Transfer Order Success Email Notifications

This section allows you to manage email notifications that will be sent to the admin and customers when the admin approves the transfer order request:

- **Enable:** select Yes/No to enable/disable this feature.
- **Email Sender:** define the email that will be used to send email notifications.
- **Send Emails To:** When the admin approves a transfer order request, an email will be sent to these addresses. You can add multiple email addresses separated by commas.

- **Email Template for Send Emails To:** select a template for the email that will be sent to addresses that you enter in the Send Emails To field to notify a transfer order request approved by admin.

- **Email Template for Customer:** select a template for the email that will be sent to the customer after the admin approves his/her transfer order request.

- **Email Template for Transfer Order Recipient:** select a template for the email that will be sent to the customer who receives the transfer order after the admin approves the transfer order request.

4. Transfer Order Cancellation Email Notifications

This section allows you to manage email notifications that will be sent to the admin and customers when the admin cancels the transfer order request:

- **Enable:** select Yes/No to enable/disable this feature.
- **Email Sender:** define the email that will be used to send email notifications.

- **Send Emails To:** when the admin cancels a transfer order request, an email will be sent to these addresses. You can add multiple email addresses separated by commas.

- **Email Template for Send Emails To:** select a template for the email that will be sent to addresses that you enter in the Send Emails To field to notify a transfer order request canceled by admin.

- **Email Template for Customer:** select a template for the email that will be sent to the customer after the admin cancels his/her transfer order request.

IV) Manage Transfer Order Requests

You can manage, edit, and delete created transfer order requests in this section. To access it, navigate to **Sales > Transfer Order Requests**:
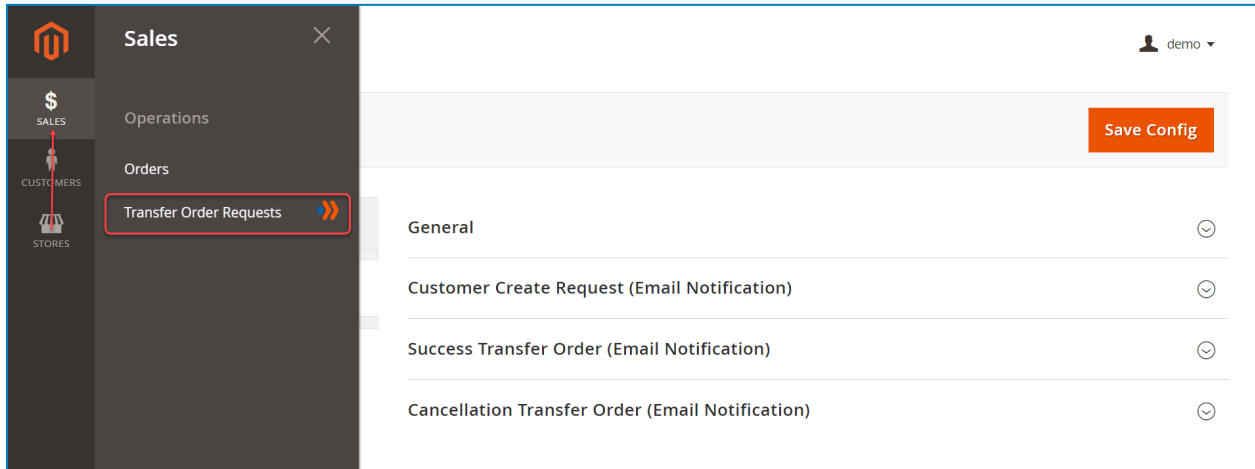
1. Add New Transfer Order Request

On the **Transfer Order Requests** page, press **Add New Transfer Order Request** button to add a new transfer order request right in the backend:
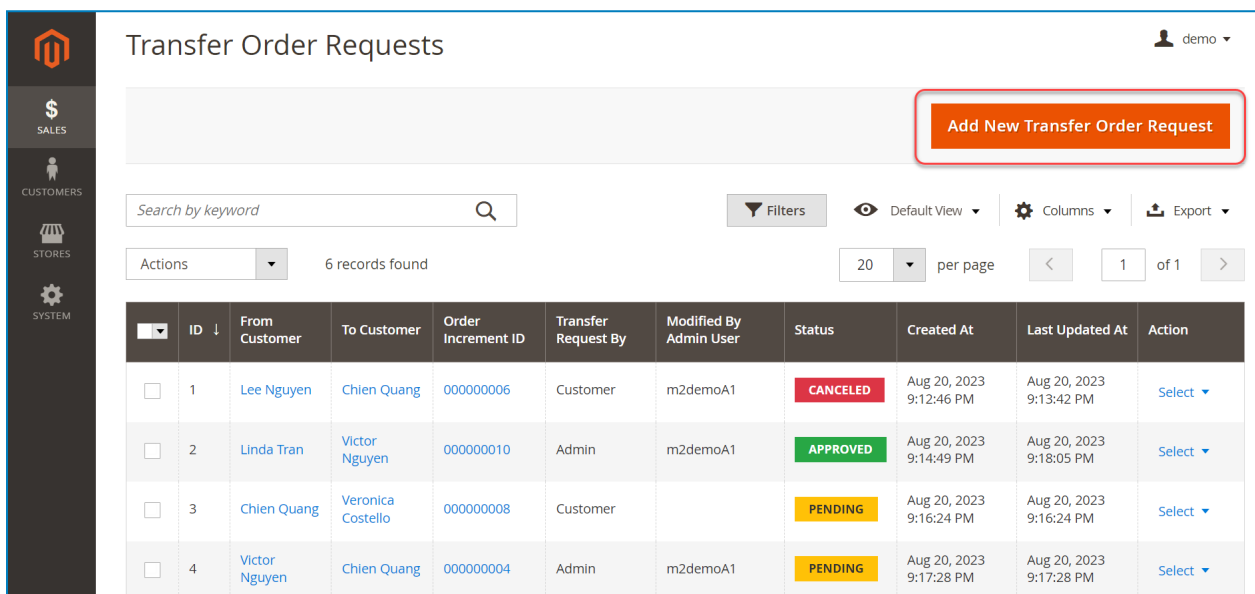
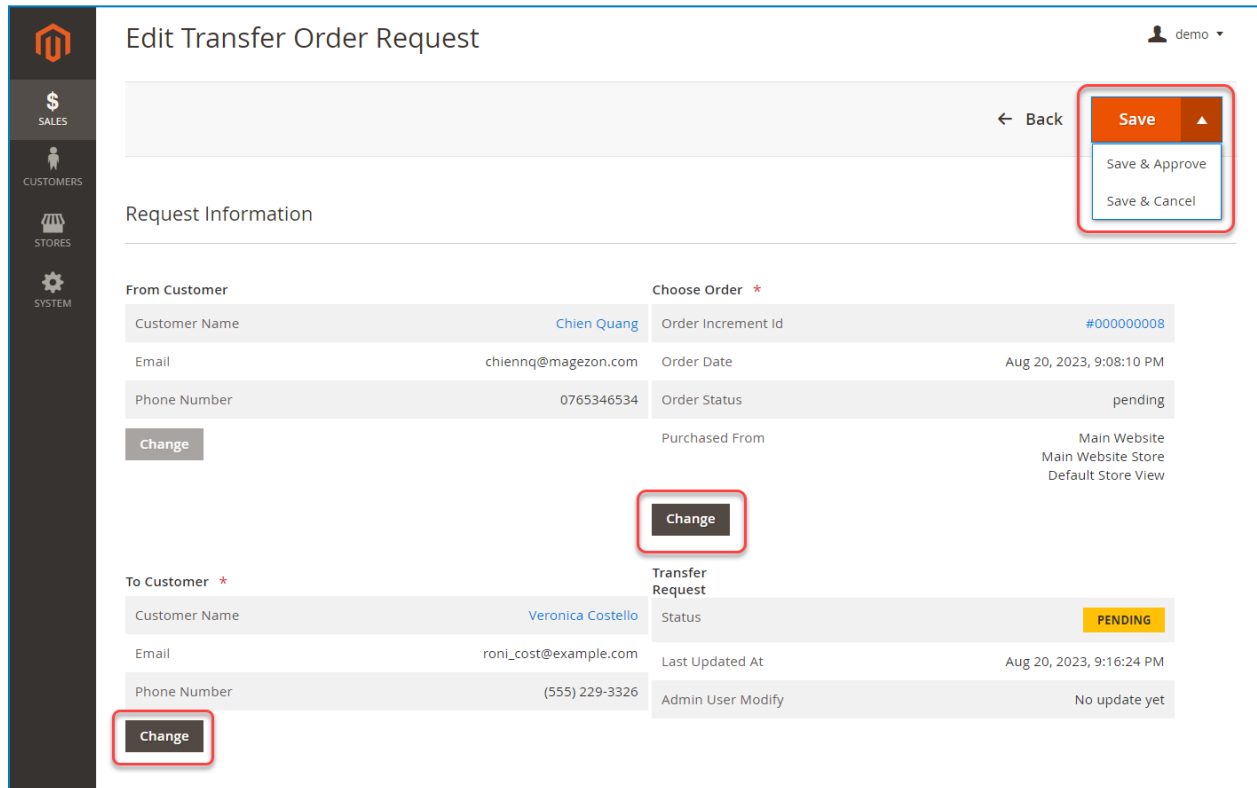Then you will be navigated to the **Add New Transfer Order Request** page:

- **Choose Order:** select an order to transfer.
- **To Customer:** define a customer who will receive the order.

2. Edit Transfer Order Request

On the **Action** column of the **Transfer Order Requests** grid, click **Select** then a drop-down menu will appear. Simply press **Edit** to access the **Edit Transfer Order Request** page:

On this page, you can change **Order** and change **To Customer**. Moreover, you also can change the transfer order request status (approve/cancel):
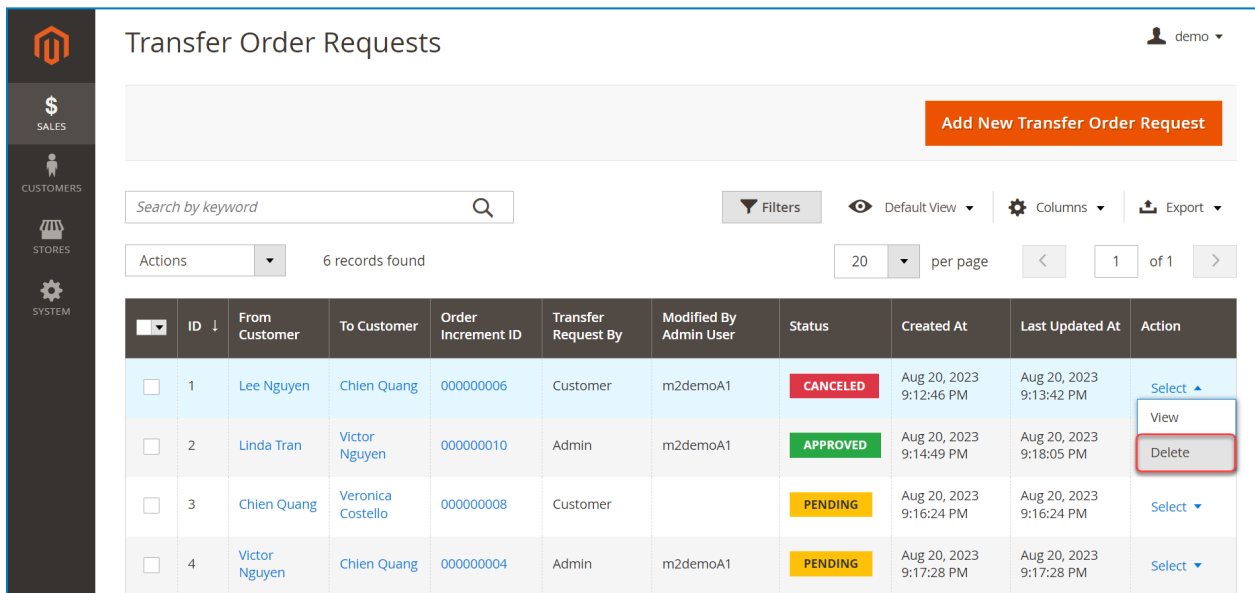
Note: You only can edit the transfer order request on pending.

3. Delete Transfer Order Request

On the **Action** column of the **Transfer Order Requests** grid, click **Select** then a drop-down menu will appear. Simply press **Delete** to delete the transfer order request:

In addition, tick the checkbox of transfer order requests in the **Transfer Order Requests** grid and click **Delete** from the **Actions** drop-down to delete multiple requests at once:

V) Support

If you have any questions or need any support, feel free to contact us via the following ways. We will get back to you within 24 hours after you submit your support request.

- Submit contact form.
- Email us at support@magezon.com.
- Submit a ticket.
- Contact us through Skype: support@magezon.com.
- Contact us via live chat on our website.