

# Transfer Order for Magento 2

## User Guide

Version 1.0

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## I) Introduction

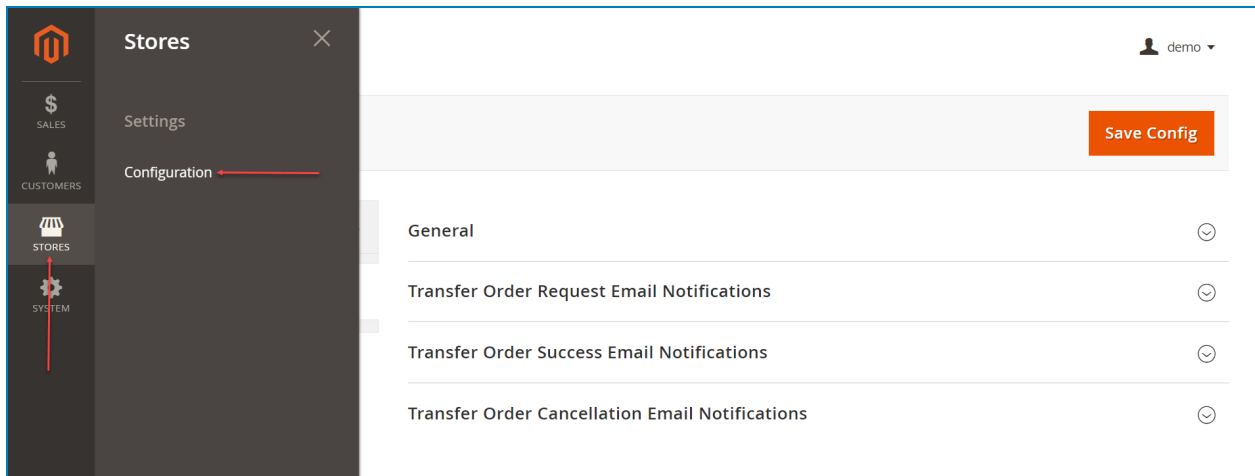
**Magento 2 Transfer Order** allows you to move orders from one customer account to another. This extension gives customers the ability to create transfer order requests right from the frontend. Moreover, it lets you manage all transfer order requests on the backend.

- 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

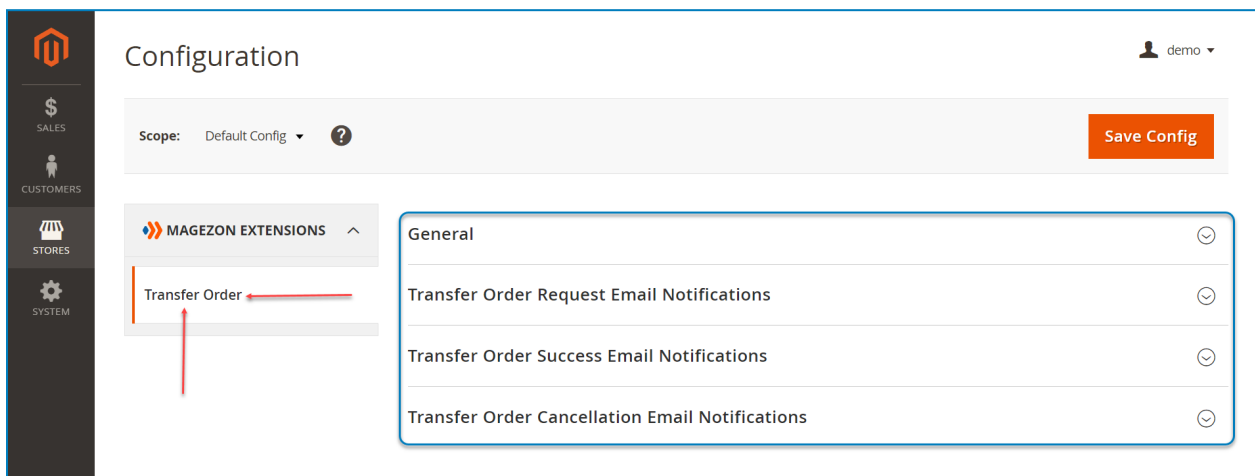
## II) Where to Find Extension

### 1. Transfer Order Extension in the Backend

After installing the extension, navigate to **Stores > Settings > Configuration**:

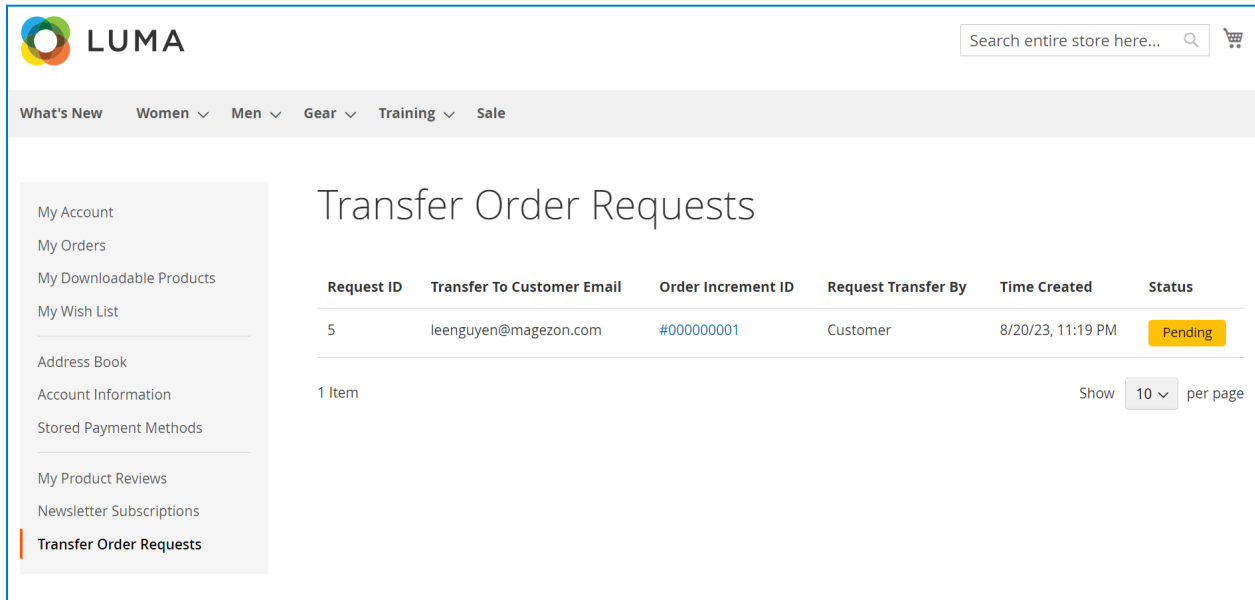


In the left panel, span **MAGEZON EXTENSIONS** and click **Transfer Order**. In the right section, there are 4 tabs: General, Transfer Order Request Email Notifications, Transfer Order Success Email Notifications, and Transfer Order Cancellation Email Notifications.



## 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:

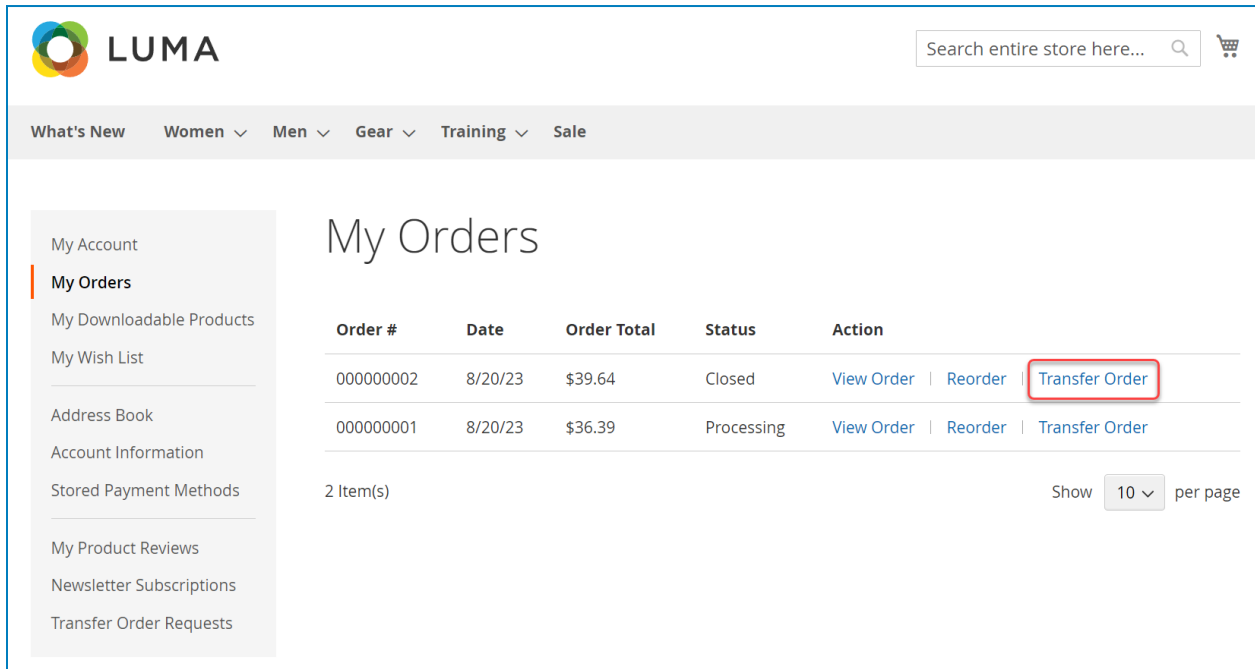



The screenshot shows the LUMA account dashboard. The top navigation bar includes 'What's New', 'Women', 'Men', 'Gear', 'Training', and 'Sale'. A search bar is located in the top right corner. The left sidebar contains a list of account-related links: My Account, My Orders, My Downloadable Products, My Wish List, Address Book, Account Information, Stored Payment Methods, My Product Reviews, Newsletter Subscriptions, and Transfer Order Requests (which is highlighted). The main content area is titled 'Transfer Order Requests' and displays a table with the following data:

Request ID	Transfer To Customer Email	Order Increment ID	Request Transfer By	Time Created	Status
5	leenguyen@magezon.com	#000000001	Customer	8/20/23, 11:19 PM	Pending

Below the table, it indicates '1 Item' and a pagination control showing 'Show 10 per page'.

Customers can view their orders on the **My Orders** page and add new transfer order requests here:



**LUMA** Search entire store here... 

What's New Women Men Gear Training Sale

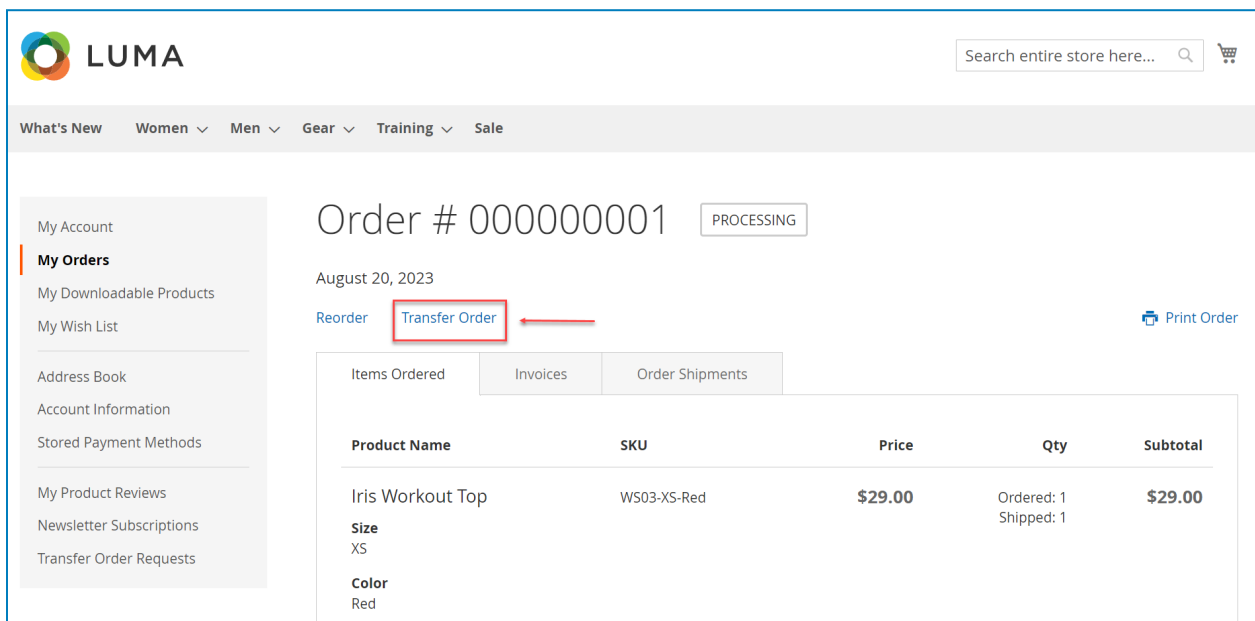
My Account  
**My Orders**  
My Downloadable Products  
My Wish List  
Address Book  
Account Information  
Stored Payment Methods  
My Product Reviews  
Newsletter Subscriptions  
Transfer Order Requests


## My Orders

Order #	Date	Order Total	Status	Action
000000002	8/20/23	\$39.64	Closed	<a href="#">View Order</a>   <a href="#">Reorder</a>   <a href="#">Transfer Order</a>
000000001	8/20/23	\$36.39	Processing	<a href="#">View Order</a>   <a href="#">Reorder</a>   <a href="#">Transfer Order</a>

2 Item(s) Show 10 per page

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



**LUMA** Search entire store here... 

What's New Women Men Gear Training Sale

My Account  
**My Orders**  
My Downloadable Products  
My Wish List  
Address Book  
Account Information  
Stored Payment Methods  
My Product Reviews  
Newsletter Subscriptions  
Transfer Order Requests

## Order # 000000001

PROCESSING

August 20, 2023

[Reorder](#) | [Transfer Order](#) | [Print Order](#)

Items Ordered | Invoices | Order Shipments

Product Name	SKU	Price	Qty	Subtotal
Iris Workout Top	WS03-XS-Red	\$29.00	Ordered: 1 Shipped: 1	\$29.00

Size XS  
Color Red

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.

✕  

## Transfer Order

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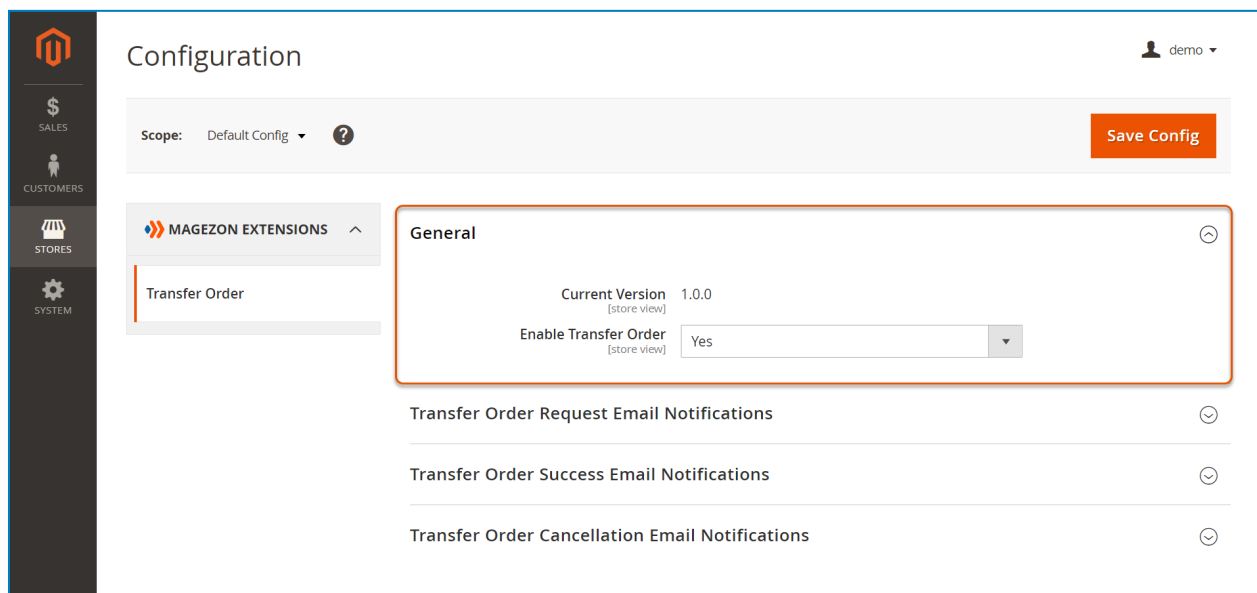
Please enter the email of the account you want to transfer.

## 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]   Use system value

**Email Sender** [store view]   Use system value

**Send Emails To** [store view]   
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]   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]   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:

**Transfer Order Success Email Notifications** ⌵

<b>Enable</b> <small>[store view]</small>	Yes	<input checked="" type="checkbox"/>	Use system value
<b>Email Sender</b> <small>[store view]</small>	General Contact	<input checked="" type="checkbox"/>	Use system value
<b>Send Emails To</b> <small>[store view]</small>	chienng@magezon.com		
	<small>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.</small>		
<b>Email Template for Send Emails To</b> <small>[store view]</small>	Transfer Order Request Success (Default)	<input checked="" type="checkbox"/>	Use system value
	<small>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.</small>		
<b>Email Template for Customer</b> <small>[store view]</small>	Transfer Order Success For Customer To (Default)	<input checked="" type="checkbox"/>	Use system value
	<small>Select a template for the email that will be sent to the customer after the admin approves his/her transfer order request.</small>		
<b>Email Template for Transfer Order Recipient</b> <small>[store view]</small>	Transfer Order Success For Customer From (Default)	<input checked="" type="checkbox"/>	Use system value
	<small>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.</small>		

- **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:

**Transfer Order Cancellation Email Notifications** ⌵

**Enable** [store view]   Use system value

**Email Sender** [store view]   Use system value

**Send Emails To** [store view]   
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** [store view]   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 transfer order request canceled by admin.

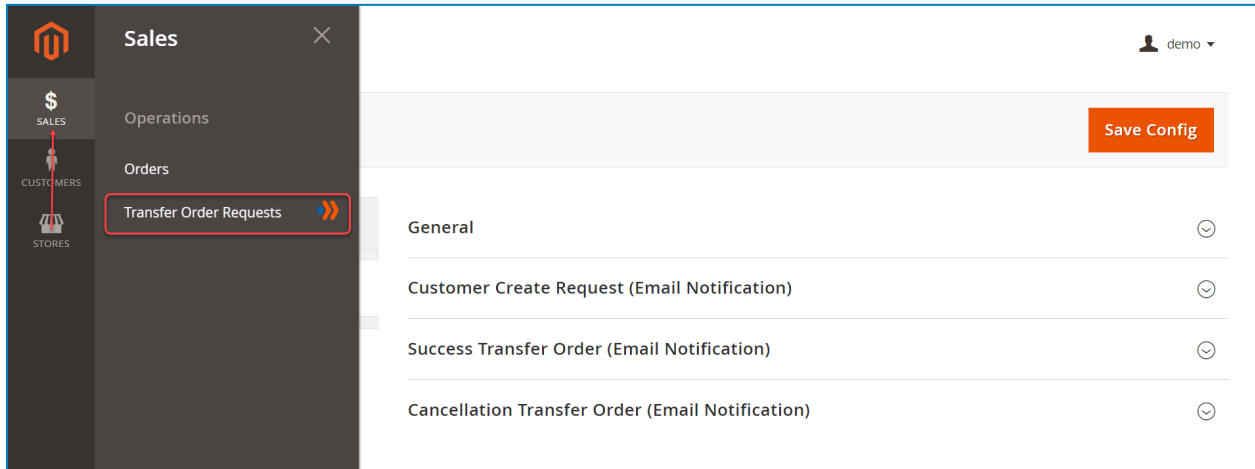
**Email Template for Customer** [store view]   Use system value  
Select a template for the email that will be sent to the customer after the admin cancels his/her transfer order request.

- **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.

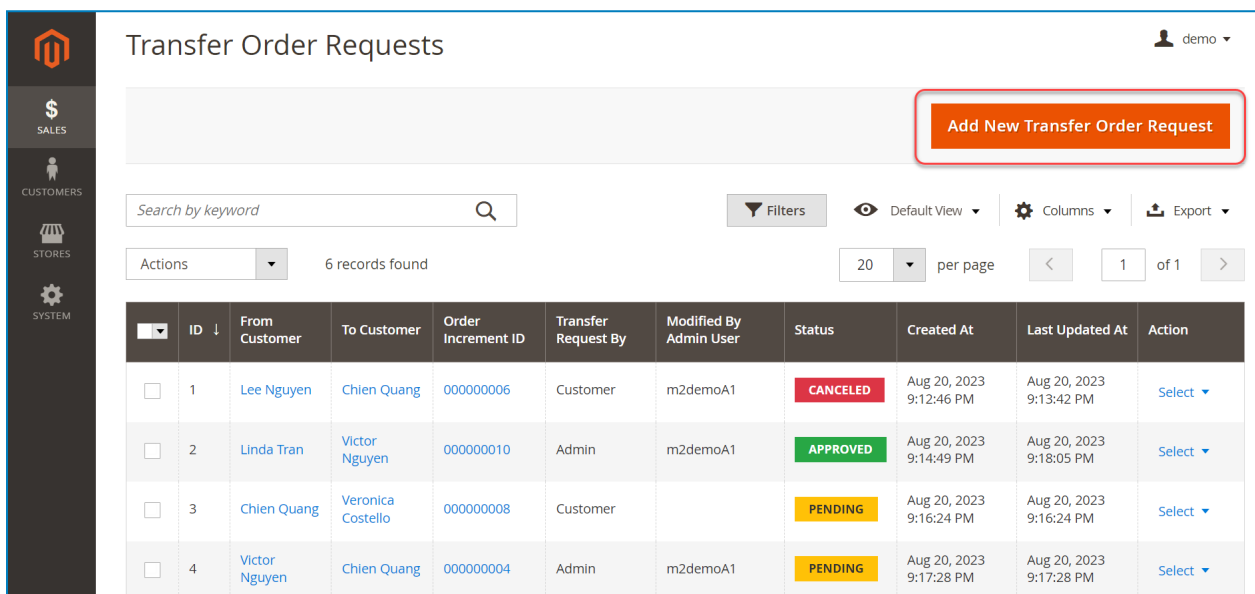
## IV) Manage Transfer Order Requests

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:

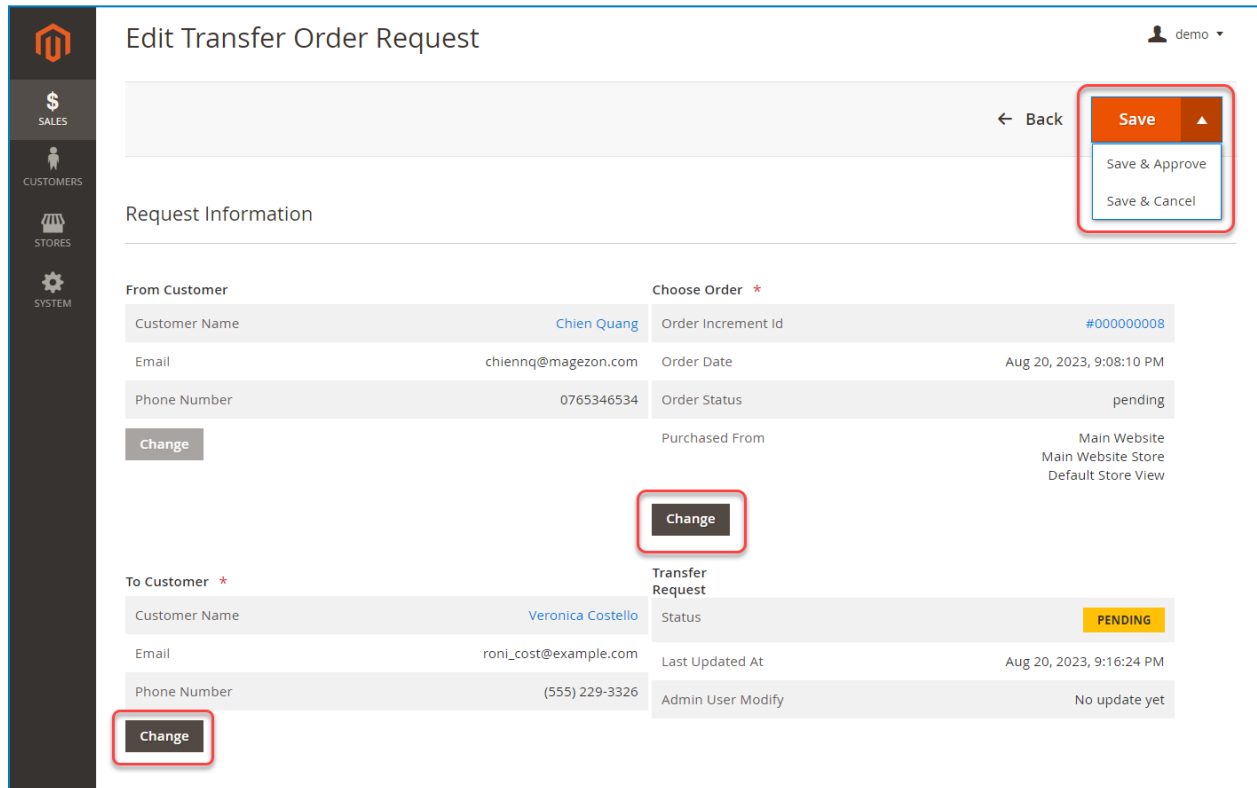
- **Choose Order:** select an order to transfer.
- **To Customer:** define a customer who will receive the order.

## 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:

ID	From Customer	To Customer	Order Increment ID	Transfer Request By	Modified By Admin User	Status	Created At	Last Updated At	Action
1	Lee Nguyen	Chien Quang	000000006	Customer	m2demoA1	CANCELED	Aug 20, 2023 9:12:46 PM	Aug 20, 2023 9:13:42 PM	Select
2	Linda Tran	Victor Nguyen	000000010	Admin	m2demoA1	APPROVED	Aug 20, 2023 9:14:49 PM	Aug 20, 2023 9:18:05 PM	Select
3	Chien Quang	Veronica Costello	000000008	Customer		PENDING	Aug 20, 2023 9:16:24 PM	Aug 20, 2023 9:16:24 PM	Select Edit Delete
4	Victor Nguyen	Chien Quang	000000004	Admin	m2demoA1	PENDING	Aug 20, 2023 9:17:28 PM	Aug 20, 2023 9:17:28 PM	

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



**Edit Transfer Order Request** demo ▾

← Back Save ▲  
Save & Approve  
Save & Cancel

**Request Information**

From Customer		Choose Order *	
Customer Name	Chien Quang	Order Increment Id	#000000008
Email	chiennq@magezon.com	Order Date	Aug 20, 2023, 9:08:10 PM
Phone Number	0765346534	Order Status	pending
<span style="border: 1px solid red; padding: 2px;">Change</span>		Purchased From	Main Website Main Website Store Default Store View

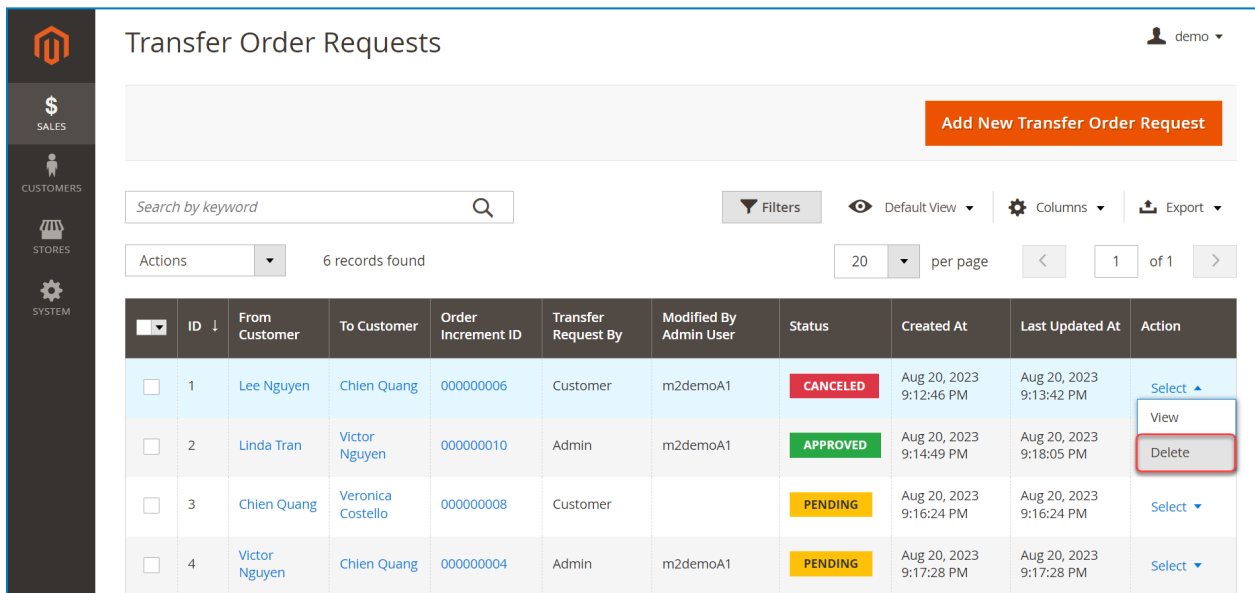
  

To Customer *		Transfer Request	
Customer Name	Veronica Costello	Status	PENDING
Email	roni_cost@example.com	Last Updated At	Aug 20, 2023, 9:16:24 PM
Phone Number	(555) 229-3326	Admin User Modify	No update yet
<span style="border: 1px solid red; padding: 2px;">Change</span>		<span style="border: 1px solid red; padding: 2px;">Change</span>	

**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:



Transfer Order Requests demo ▾

[Add New Transfer Order Request](#)

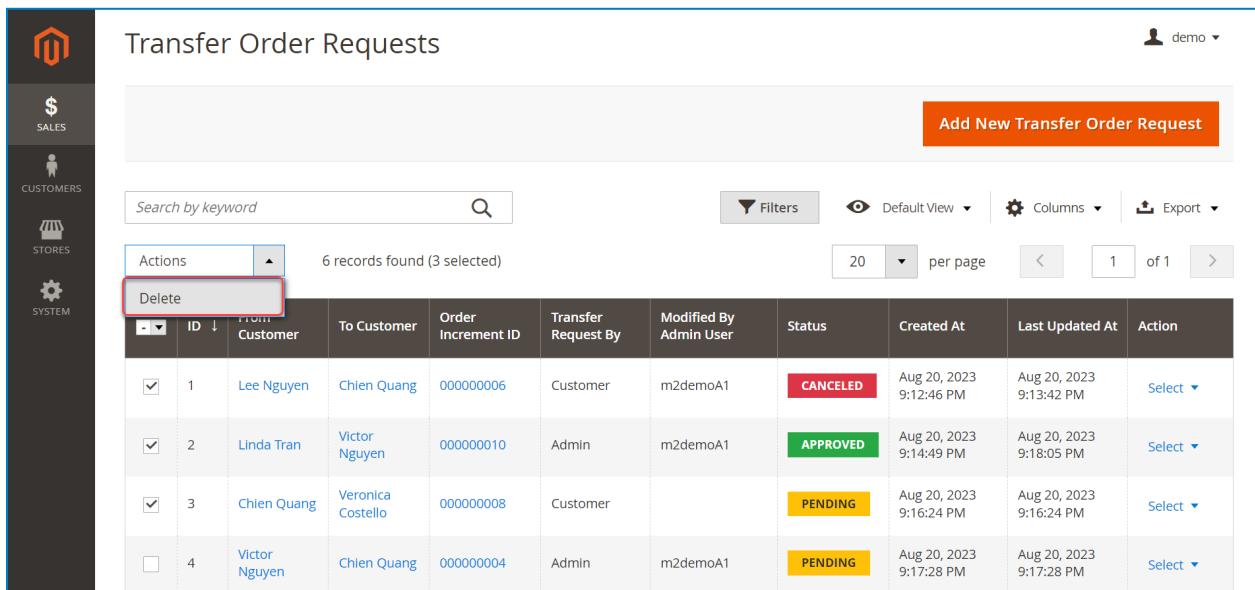
Search by keyword

Filters Default View ▾ Columns ▾ Export ▾

Actions ▾ 6 records found 20 per page < 1 of 1 >

<input type="checkbox"/>	ID ↓	From Customer	To Customer	Order Increment ID	Transfer Request By	Modified By Admin User	Status	Created At	Last Updated At	Action
<input type="checkbox"/>	1	Lee Nguyen	Chien Quang	000000006	Customer	m2demoA1	CANCELED	Aug 20, 2023 9:12:46 PM	Aug 20, 2023 9:13:42 PM	Select ▾ View Delete
<input type="checkbox"/>	2	Linda Tran	Victor Nguyen	000000010	Admin	m2demoA1	APPROVED	Aug 20, 2023 9:14:49 PM	Aug 20, 2023 9:18:05 PM	Select ▾
<input type="checkbox"/>	3	Chien Quang	Veronica Costello	000000008	Customer		PENDING	Aug 20, 2023 9:16:24 PM	Aug 20, 2023 9:16:24 PM	Select ▾
<input type="checkbox"/>	4	Victor Nguyen	Chien Quang	000000004	Admin	m2demoA1	PENDING	Aug 20, 2023 9:17:28 PM	Aug 20, 2023 9:17:28 PM	Select ▾

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:



Transfer Order Requests demo ▾

[Add New Transfer Order Request](#)

Search by keyword

Filters Default View ▾ Columns ▾ Export ▾

Actions ▾ 6 records found (3 selected) 20 per page < 1 of 1 >

<input type="checkbox"/>	ID ↓	From Customer	To Customer	Order Increment ID	Transfer Request By	Modified By Admin User	Status	Created At	Last Updated At	Action
<input checked="" type="checkbox"/>	1	Lee Nguyen	Chien Quang	000000006	Customer	m2demoA1	CANCELED	Aug 20, 2023 9:12:46 PM	Aug 20, 2023 9:13:42 PM	Select ▾
<input checked="" type="checkbox"/>	2	Linda Tran	Victor Nguyen	000000010	Admin	m2demoA1	APPROVED	Aug 20, 2023 9:14:49 PM	Aug 20, 2023 9:18:05 PM	Select ▾
<input checked="" type="checkbox"/>	3	Chien Quang	Veronica Costello	000000008	Customer		PENDING	Aug 20, 2023 9:16:24 PM	Aug 20, 2023 9:16:24 PM	Select ▾
<input type="checkbox"/>	4	Victor Nguyen	Chien Quang	000000004	Admin	m2demoA1	PENDING	Aug 20, 2023 9:17:28 PM	Aug 20, 2023 9:17:28 PM	Select ▾



## 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](mailto:support@magezon.com).
- Submit a [ticket](#).
- Contact us through [Skype](#): support@magezon.com.
- Contact us via live chat on our [website](#).