

# Magento 2 Order Tagger

## Installation and User Guide for Magento 2 Order Tagger Extension

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## Installation

- **Installation via app/code:** Upload the content of the module to your root folder. This will not overwrite the existing Magento folder or files, only the new contents will be added. After the successful upload of the package, run below commands on Magento 2 root directory.

```
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
```

- **Installation via Composer:** Please follow the guide provided in the below link to complete the installation via composer.

<https://docs.scommerce-mage.com/magento-2-extensions/installation-via-composer/installation-via-composer>

## Configuration Settings for Order Tagger

Go to **Admin > Stores > Configuration > Scommerce Configuration > Order Tagger**

### General Settings

- **Enabled** - Select "Yes" or "No" to enable or disable the module.
- **License Key** - Please add the license for the extension which is provided in the order confirmation email. Please note license keys are site URL specific. If you require license keys for dev/staging sites then please email us at [support@sccommerce-mage.com](mailto:support@sccommerce-mage.com).

General



<b>Enabled</b> <small>[store view]</small>	<input type="text" value="Yes"/>	<input type="checkbox"/> Use system value
<small>This setting will be used to enable or disable module</small>		
<b>License Key</b> <small>[store view]</small>	<input type="text" value="prdWvY0fpQUQ"/>	
<small>This setting will be used to verify your license key for the give domain</small>		
<small>N.B. License keys are domain specific so for your testing or staging sites please email us at <a href="mailto:core@sccommerce-mage.com">core@sccommerce-mage.com</a></small>		

### Order Tags Grid

Go to **Admin>Sales>Scommerce Order Tagger>Order Tags**

[Add New Tag](#)

Filters | Default View | Columns

Tag ID:  Name:  Type:  Sort Order:

Text Color:  Background Color:  Status:

[Cancel](#) [Apply Filters](#)

13 records found 20 per page < 1 of 1 >

Tag ID	Name	Type	Sort Order	Text Color	Background Color	Action	Status
14	TIQ	Dynamic	1	#eaeaea	#343434	Select	Enabled
17	purchase from1	Dynamic	1	#23f09	#fff1c1	Select	Enabled
19	Regional	Dynamic	1	#343434	#ecb722	Select	Enabled
29	PSO	Predefined	0	#0000fe	#82b66a	Select	Enabled
30	BO	Predefined	4	#599b3d	#a8d098	Select	Enabled
32	OOS	Predefined	1	#123e4a	#d64e53	Select	Enabled
35	testdynamic	Dynamic	11	#8fb8e3	#535353	Select	Enabled
40	Uk Shipping	Dynamic	0	#000000	#8fb8e3	Select	Enabled
41	High Value Order	Static	0	#000000	#f0f0f0	Select	Enabled
43	PI02	Predefined	1	#fb00ff	#e5c7d4	Select	Enabled
45	STATIC TAG	Static	1	#fb00ff	#f6c18b	Select	Enabled
46	DYNAMIC TAG	Dynamic	11	#5d96d3	#510001	Select	Enabled
47	PRE DEFINED TAG-- FIRST TIME CUSTOMER	Predefined	3	#21ffff	#7b64b6	Select	Enabled

- **Name-** Enter the name of the tag.
- **Type-** Select "Static" or "Dynamic" or "Predefined". Static tags can be manually assigned and dynamic tags can be assigned using conditions. Predefined tags already have conditions set so you only to select the predefined tag type.
- **Sort Order-** Define the priority of the tag(0 being the highest priority), the highest priority tag will be displayed first.
- **Text Color-** Add the text color for the tag.
- **Background Color-** Add the background color for the tag

[Add New Tag](#)

Filters | Default View | Columns

Tag ID:  Name:  Type:  Sort Order:

Text Color:  Background Color:  Status:

[Cancel](#) [Apply Filters](#)

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29	PSO	Predefined	0	#0000fe	#82b66a	Select	Enabled
30	BO	Predefined	4	#599b3d	#a8d098	Select	Enabled
32	OOS	Predefined	1	#123e4a	#d64e53	Select	Enabled
35	testdynamic	Dynamic	11	#8fb8e3	#535353	Select	Enabled
40	Uk Shipping	Dynamic	0	#000000	#8fb8e3	Select	Enabled
41	High Value Order	Static	0	#000000	#f0f0f0	Select	Enabled
43	PI02	Predefined	1	#fb00ff	#e5c7d4	Select	Enabled
45	STATIC TAG	Static	1	#fb00ff	#f6c18b	Select	Enabled
46	DYNAMIC TAG	Dynamic	11	#5d96d3	#510001	Select	Enabled
47	PRE DEFINED TAG-- FIRST TIME CUSTOMER	Predefined	3	#21ffff	#7b64b6	Select	Enabled

**Conditions-** Add the conditions using order or address attributes.

**EDIT TAG**

---

Tag Information

---

Conditions

### Conditions

Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE :

Shipping Country is United Kingdom

Please choose a condition to add.

- Please choose a condition to add.
- Conditions combination
- Address Attribute**
  - Shipping Postcode
  - Shipping Region
  - Shipping State/Province
  - Shipping Country
- Order Attribute**
  - Subtotal (incl. Tax)
  - Subtotal
  - Total Items Quantity
  - Payment Method
  - Shipping Method
  - Status
  - Purchased From

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## Order Tags Logs

Go to **Admin>Sales>Scommerce Order Tagger>Order Tags Logs**

The logs keep track of all the dynamic tags that are assigned to orders. It has its own set of filters which can be used to identify a specific assigned tag.

[Add New Tag](#)

Filters | Default View | Columns

Tag ID

Name

Type

Sort Order

Text Color

Background Color

Status

Cancel Apply Filters

13 records found 20 per page | 1 of 1

Tag ID	Name	Type	Sort Order	Text Color	Background Color	Action	Status
14	TIQ	Dynamic	1	#eaeaea	#343434	Select	Enabled
17	purchase from1	Dynamic	1	#23f09	#fff1c1	Select	Enabled
19	Regional	Dynamic	1	#343434	#ecb727	Select	Enabled
29	PSO	Predefined	0	#0000fe	#82b06a	Select	Enabled
30	BO	Predefined	4	#599b3d	#a8d098	Select	Enabled
32	OOS	Predefined	1	#123e4a	#d54e53	Select	Enabled
35	testdynamic	Dynamic	11	#8f08e3	#535353	Select	Enabled
40	Uk Shipping	Dynamic	0	#000000	#8f08e3	Select	Enabled
41	High Value Order	Static	0	#000000	#f0f0f0	Select	Enabled
43	PIQ2	Predefined	1	#fb00ff	#e5c764	Select	Enabled
45	STATIC TAG	Static	1	#fb00ff	#f6c18b	Select	Enabled
46	DYNAMIC TAG	Dynamic	11	#5d96d3	#510001	Select	Enabled
47	PRE DEFINED TAG- FIRST TIME CUSTOMER	Predefined	3	#21fff	#7b64b6	Select	Enabled

## Types of Tags

There are three of tags within the extension static, dynamic, and predefined tags.

### Static Tags

After creation, these types of tags are added manually via Magento order grid. Conditions are not added in these types of tags. They are not shown in order tags logs.

The screenshot shows the 'EDIT TAG' interface in Magento. The 'Tag Information' section is active. The 'Name' field is set to 'STATIC TAG' and is highlighted with a red box. Below it, the 'Type' dropdown is set to 'Static', also highlighted with a red box and a red arrow pointing to it. The 'Status' is 'Yes'. The 'Sort Order' is '1'. The 'Text Color' is '#fb00ff' and the 'Background Color' is '#ffc18b'. The footer shows 'Copyright © 2023 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.4.4'.

## Dynamic Tags

After creation, these types of tags are added automatically to the orders applicable. Conditions are added in these types of tags. They are shown in the Order tags logs.

The screenshot shows the 'EDIT TAG' interface in Magento. The 'Tag Information' section is active. The 'Name' field is set to 'DYNAMIC TAG' and is highlighted with a red box. Below it, the 'Type' dropdown is set to 'Dynamic', also highlighted with a red box and a red arrow pointing to it. The 'Status' is 'Yes'. The 'Sort Order' is '11'. The 'Text Color' is '#5d96d3' and the 'Background Color' is '#510001'. The footer shows 'Copyright © 2023 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.4.4'.

## Predefined Tags

After creation, these types of tags are added automatically to the orders applicable. Conditions are not added in these types of tags as they are already set. They are shown in the Order tags logs Irrespective of the name, only one type of tag can be created for one 'Predefined' field.

**EDIT TAG**

Tag Information ✓

Conditions

Tag Information

Status  Yes

Name \* PRE DEFINED TAG-- FIRST TIME CUSTOMER  
Multiple Tags with the same name is not allowed

Type \* Predefined ?

Predefined \* Out Of Stock

Sort Order \* Out Of Stock  
Partially Shipped Order  
Partially Invoiced Order  
Back Order  
First Time Customer played first

Text Color \* #

Background Color \* #

There are five types of predefined tags to choose from:-

1. **Out of Stock :-** Gets automatically assigned to the orders whose products are out of stock. As soon as the product is available the tag gets removed automatically.
2. **Partially Shipped Order:-** Gets automatically assigned to orders that are partially shipped i.e only a few quantities are shipped from the order. As soon all the entire order is invoiced the tag gets removed automatically.
3. **Partially Invoiced Order:-** Gets automatically assigned to orders that are partially invoiced i.e only some quantity of the order is invoiced. As soon all the entire order is invoiced the tag gets removed automatically.
4. **Back Order:-** Gets automatically assigned to backorders. This tag doesn't work with downloadable and virtual products. As soon as all the items in the order are shipped the tag gets removed automatically.
5. **First Time Customer:-** Gets automatically assigned to the orders that are placed by first-time customers. This works for both guest/registered users.

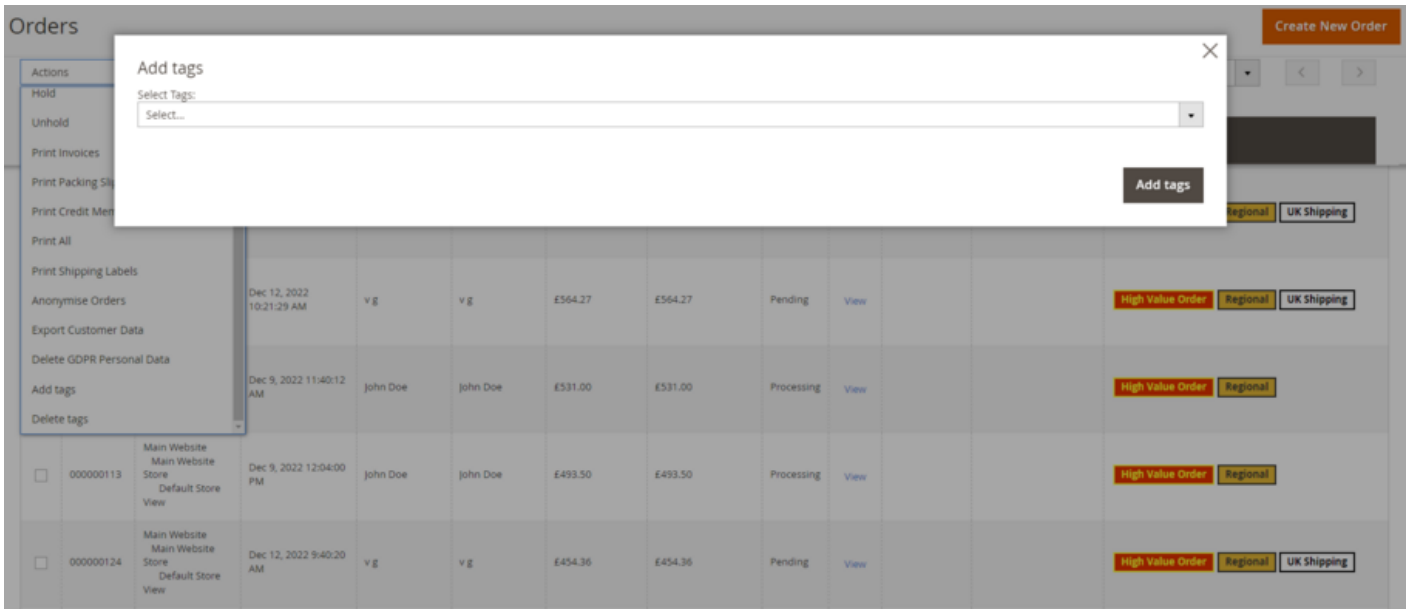
## Assign Tags

The tags can be assigned either manually or automatically using conditions set during the tag creation.

### Manually Assign/Remove Tags

Go to **Admin>Sales>Orders** then select the order or multiple orders then click on the Actions dropdown and click on 'Add tags' or 'Remove tags'. Select the tag that you want add with the order from the 'Select Tags' dropdown and finally click on Add tags.

**Note:-** Only static Tags can be manually assigned.



## Assign Tags Based on Conditions

Dynamic Tags are automatically assigned based on the conditions set while creating the tag. Go to **Admin>Sales>Scommerce Order Tagger>Order Tags** then create a new tag and set conditions from the left menu.

## Tags in Action

### Order Grid

The Tags are displayed in the order grid in a separate column. Multiple tags can be assigned and displayed for a single order.

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Customer Email	Action	Allocated sources	Braintree Transaction Source	Tags
400000006	Main Website Main Website Store France	Jan 5, 2023 5:50:53 PM	vg	vg	£156.00	£156.00	Processing	vipingumani1@gmail.com	View	Default Source		BO purchase from1 Regional OOS UK Shipping High Value Order PSD
400000005	Main Website Main Website Store France	Jan 5, 2023 9:56:36 AM	vg	vg	£181.00	£181.00	Processing	vipingumani1@gmail.com	View	Default Source		BO Regional purchase from1 UK Shipping High Value Order
400000004	Main Website Main Website Store France	Dec 28, 2022 8:44:01 AM	vg098 gvg	vg098 gvg	£1,425.00	£1,425.00	Complete	dfbnunbrtnb@yopmail.com	View	Default Source		OOS purchase from1 Regional High Value Order
400000003	Main Website Main Website Store France	Dec 19, 2022 11:48:58 AM	vg	vg	£200.00	£200.00	Processing	kjngfsdfv@GV.com	View	Default Source		testdynamic BO Regional purchase from1 UK Shipping High Value Order
400000002	Main Website Main Website Store France	Dec 19, 2022 11:45:26 AM	vg	vg	£642.73	£642.73	Complete	kjngfsdfv@GV.com	View	Default Source		BO purchase from1 Regional FTC UK Shipping High Value Order
400000001	Main Website Main Website Store France	Dec 16, 2022 11:04:19 AM	vg098 gvg	vg098 gvg	£1,425.00	£1,425.00	Complete	dfbnunbrtnb@yopmail.com	View	Default Source		purchase from1 Regional OOS FTC High Value Order PSD
300000009	Main Website Main Website Store Japan	Jan 17, 2023 3:53:35 PM	vg	vg	£261.00	£261.00	Processing	vipingumani1@gmail.com	View	Default Source		PI03 OOS purchase from1 Regional PSD High Value Order

### Filter Order Grid

Orders can be filtered based on the tags. New filter option can be found in the filters where orders can be sorted based on the tags selected. Go to **Admin>Sales>Filters** and click on the Tags dropdown to select the tags.

The screenshot displays the Magento Admin interface for filtering orders. At the top, there is a search bar and navigation options. Below, there are several filter sections: 'Purchase Date', 'Grand Total (Base)', 'Grand Total (Purchased)', and 'Purchase Point'. A 'Tags' dropdown menu is open, showing a list of tags including 'TIQ', 'purchase from1', 'Regional', 'FTC', 'PSO', 'BO', 'OOS', 'testdynamic', 'Uk Shipping', 'High Value Order', 'v', and 'PHO2'. The main content area shows a table of orders with columns for 'Ship-to Name', 'Grand Total (Base)', 'Grand Total (Purchased)', 'Status', 'Customer Email', 'Action', 'Allocated sources', 'Braintree Transaction Source', and 'Tags'. The 'Tags' column contains colored tags for each order, such as 'BD', 'purchase from1', 'Regional', 'OOS', 'UK Shipping', and 'High Value Order'. A 'Done' button is visible at the bottom of the tags dropdown.

If you have a question related to this extension please check out our **FAQ Section** first. If you can't find the answer you are looking for then please contact [support@scommerce-mage.com](mailto:support@scommerce-mage.com).

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