For more details see how the Cancel Orders for Magento 2 extension works.

# **Guide for Cancel Orders for Magento 2**

Improve customer loyalty and enhance your store usability by providing cancellation options right on the frontend. Monitor all cancellation requests in one place and automatically restock products with the Magento 2 Cancel Orders extension.

- Allow customers to cancel orders in accounts
- Show handy cancellation popup
- Provide cancellation reasons dropdown
- Track annulation requests in a separate grid
- Notify your managers about new cancellations
- Automatically restock cancelled items
- WCAG compliance (for Luma Theme)
- Mage-OS compatible
- Hyva-ready storefront and Hyva Checkout compatible by default

The extension is compatible with **Hyvä Theme**. You can find the 'amasty/module-cancel-orders-hyvacompatibility' package for installing in composer suggest. The compatibility is available as a part of an active product subscription or support subscription.

# Configuration

To adjust the basic extension setting, navigate to **Stores**  $\rightarrow$  **Configuration**  $\rightarrow$  **Amasty Extensions**  $\rightarrow$  **Cancel Orders** tab.

#### **General Settings**

In the **General** section you can limit the possibility to cancel orders and configure the strategy or refunds processing.



**Enabled** - set to Yes to activate the extension.

**Allow for Selected Group(s)** - choose all or particular customer groups for which order cancellation will be available.

**Allowed Order Status(es)** - specify which orders can be cancelled, e.g. you may allow customers to cancel pending orders only.

**Refund Paid Processing Orders Automatically** - enable or disable automatic refunds for canceled orders. You may also choose one of the follwong refund strategies:

- **Disabled** customers will be able to cancel Processing Order only if it wasn't yet invoiced.
- **Online** in this mode Processing Order with online invoice will be refunded online (exception: if order has several invoices, it will be refunded offline).

## <u>a</u>masty

• Offline - all orders will be refunded offline regardless used payment method.

All products in canceled orders will be returned to stock automatically.

#### How it works:

The extension process the requests in the following way:

- 1. *Pending* are automatically transformed into *Canceled*
- 2. Processing orders without invoices and Suspected Fraud are transformed into Canceled
- 3. *Processing* orders with invoices are refunded: if automatic refund is selected, a Credit Memo is created and the status of the main order is switched to *Closed*. After that, the status is automatically changed to *Canceled* and the comment is added as well.

For orders with invoices in the **pending** status, we have linked the behavior to the **Automatically Return Credit Memo Item to Stock** setting (located at **Stores**  $\rightarrow$  **Configuration**  $\rightarrow$  **Catalog**  $\rightarrow$ **Inventory**  $\rightarrow$  **Product Stock Options**).

Therefore, when canceling orders with invoices using the module:

- If Automatically Return Credit Memo Item to Stock is set to Yes, the products are returned to stock.
- If Automatically Return Credit Memo Item to Stock is set to No, the products are NOT returned to stock.

#### **Frontend Settings**

Expand this tab to customize cancellation popup window.

#### Frontend

Button Label [store view]	Cancel Order			
Enable Cancellation Popup [store view]	Yes			
Popup Notice [store view]	Your request will be solved in 48 hours			
Order Cancellation Reasons [store view]	Reasons Actions			
	I have changed my mi			
	I bought the wrong ite			
	I found a cheaper alte			
	I placed a duplicate or			
	I received negative fee			
	Delivery takes too lon 👕			
	III Other			
	Add			
Is Required [store view]	Comment Reason			

**Button Label** - specify a button text for order cancellation that will be displayed in a customer account.

This text will be shown in the My Orders tab.

My Or	ders		
Order Total	Status	Action	*
\$28.82	Pending	View Order   Reorder	Cancel Order
\$56.96	Pending	View Order   Reorder	Cancel Order
\$85.52	Pending	View Order   Reorder	Cancel Order

**Enable Cancellation Popup** - choose *Yes* to display a popup with cancellation reasons and a comment field. Due to the popup, you can find out why customers cancel orders and improve your selling strategy.

**Popup Notice** - specify the notice that will be added to the popup. You may use it to provide customers with cancellation terms or any additional info.

**Order Cancellation Reasons** - add the reasons for Cancel Order and set the sequence for frontend display using drag-and-drop. Customers will be able to choose the necessary reason in a dropdown.

**Is Required** - select the fileds that must be filled for cancellation request.

The configured popup is displayed in the following way:



#### **Auto Cancel Mode**

Using this tab, store admin can adjust automatic cancellation for pending orders after a certain period of time.

#### Auto Cancel Mode

Enabled [global]	Yes Enable to automatically cancel pending orders after a set pe of time.	• eriod
Consider Orders Created from [global]	2019-01-01 Orders with older Creation Date will not be automatically canceled. If left empty, all orders are considered.	<b>U=U</b> 
Consider Order Status(es) [global]	Pending Pending Payment	
Conditions based on Payment Method [global]	Payment Method(s)Duration unitAct unitNo Payn10Day(s)	ions
	Check / I     Image: The second	•
	Add	

**Enabled** - choose 'Yes' to automatically cancel pending orders after a set period of time.

**Consider Orders Created from** - specify the particular period of time. Orders with the earlier Creation Date will not be automatically canceled. If left empty, all orders are considered.

**Consider Order Status(es)** - select order statuses for which auto cancellation will be applied.

**Conditions based on Payment Method** - add particular payment methods for which automatic cancellation will be available.

Apart from preconfigured payment methods, you may choose **No Payment Information Required**. It means that orders with store credits, rewards and gift cards as a payment methods will be also available for cancelling.

In addition to this, set the following conditions:

- **Duration** specify time period after which an order with the particular payment method will be canceled.
- **Duration unit** select the unit for calculating: Day(s) or Hour(s).
- Delete specific methods using the **Actions** column.

Cron is running each hour by default. If you need to apply Auto Cancel immediately, click the '*Run*' button (before performing the action, please make sure that conditions are saved).

After the cancellation is executed, you will see the notification about (un)successfully auto canceled orders.

All canceled orders will be placed in the separate Cancel Orders Grid.

#### **Admin Email Notifications**

Proceed to this tab to enable notifications and keep your managers informed about new cancellation requests.

#### Admin Email Notifications



Enable the feature and specify to whom emails should be sent. Also, select email sender and choose the template for notifications about orders canceled by customers.

You may also enable admin notifications upon automatic order cancelling.

# **Cancel Orders Grid**

For admin's convenience, the extension places all canceled orders in a separate grid. To track and manage them, navigate to **Sales**  $\rightarrow$  **Amasty Cancel Orders**  $\rightarrow$  **Cancel Orders Grid**.

Can	cel Orde	ers Grid		Q	💄 admin 👻
			<b>Filters</b> Oefault Vie	w 🕶 😫	Columns 👻
Action Delete		11 records found (2 selected)	20 • per page <	1	of 1 >
• •	Order ID	Cancellation Reason	Comment	Action	Canceled by
	#000000013	l found a cheaper alternative	Sorry for inconvenience, but I came across with a much cheaper variant	View order	Customer
~	#000000014	l placed a duplicate order		View order	Customer
	#00000009	Delivery takes too long	Moreover, the price for delivery is too high	View order	Customer
~	#00000008	I bought the wrong item(s)		View order	Customer
	#00000007	l placed a duplicate order	The website has lagged and I placed this order twice.	View order	Customer
	#00000006	I received negative feedback about the item after purchase		View order	Customer
	#000000010			View order	Auto Cancel
	#000000011			View order	Auto Cancel
	#00000012			View order	Auto Cancel

Here you can view and filter all canceled orders. In the **Canceled by** column you may see if an order was canceled by a customer or automatically. Moreover, check and analyze cancellation reasons to find gaps and make improvements.

To see the details of particular canceled order, click **View order** button.

# #00000013

Order Total

Notes for this Order	Order Totals		
Status Canceled  Comment The order has been successfully canceled.	Subtotal	\$92.00	
	Shipping & Handling	\$0.00	
	Grand Total	\$92.00	
	Total Paid	\$92.00	
	Total Refunded	\$92.00	
<ul> <li>Notify Customer by Email</li> </ul>	Total Due	\$0.00	
✓ Visible on Storefront			
Submit Comment			
Apr 20, 2020 11:21:11 AM Canceled			

Customer Notified Order was cancelled by customer. I placed a duplicate order; Apr 20, 2020 11:21:11 AM Closed Customer Not Notified We refunded \$92.00 offline.

In the **Infromation** tab and *Order Total* section you can view cancellation and refund details. Leave comments and set notifications when the status is updated if needed.

Keep in mind that refunds are processed automatically according to the settings provided in **General** configuration.

You may also check invoices, credit memos and shipments right from the Canceled Orders Grid.

To view all changes in request statuses and notes, expand the **Comments History** tab.



# #00000014

ORDER VIEW	Apr 20, 2020       11:20:46 AM       Invoice #000000003 created         Apr 20, 2020       11:21:10 AM       Credit memo #000000002 created         Apr 20, 2020       11:21:11 AM       Credit memo #000000002 created
Information	Apr 20, 2020 11:21:11 AM   Canceled   Customer <b>Notified</b> Apr 20, 2020 11:21:11 AM   Closed   Customer <b>Not Notified</b>
Invoices	Notes for this Order Order was cancelled by customer. I placed a duplicate order;
Credit Memos	Comment added Apr 20, 2020 11:21:11 AM We refunded \$92.00 offline.
Shipments	Comment added Apr 20, 2020 11:21:11 AM
Comments History	

If an order was canceled automatically, you will the the appropriate comment. In addition to this, check whether a customer has been notified.

# #00000011



# **Frontend Overview**

A customer can cancel orders in My Orders tab.

🚫 LUMA					
What's New Women $ \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! $	Men 🗸 🤇	Gear 🗸 🛛 Ti	raining $\sim$	Sale	
My Account <b>My Orders</b>	Му С	rder	S		
My Downloadable Products	Order #	Ship To	Order Total	Status	Action
My Wish List Address Book	00000012	Veronica Costello	\$28.82	Pending	View Order   Reorder   Cancel Order
Account Information Stored Payment	000000011	Veronica Costello	\$56.96	Pending	View Order   Reorder   Cancel Order
Methods Billing Agreements	00000010	Veronica Costello	\$85.52	Pending	View Order   Reorder   Cancel Order
My Product Reviews	00000006	Veronica Costello	\$96.34	Canceled	View Order   Reorder
Newsletter Subscriptions	00000005	Veronica Costello	\$88.35	Canceled	View Order   Reorder

Here a customer can check relevant statuses and reorder canceled orders as well.

Also, it is possible to cancel each particular order from the **Order view** tab.

🚫 LUMA				
What's New Women	✓ Men ∨ Gear ∨ 1	raining 🗸 🛛 Sale		
My Account	Order # (	00000012	PENDING	
My Orders				
My Downloadable Products	April 20, 2020 Reorder			
My Wish List	Cancel Order			
Address Book	Items Ordered			
Account Information				
Stored Payment Methods	Product Name	SKU	Price	Qty
Billing Agreements	Radiant Tee	WS12-S-Orange	\$22.00	Ordered: 1
My Product Reviews	Size			
Newsletter Subscriptions	<b>Color</b> Orange			
				Subtotal
Compare Products			Shipping	g & Handling
ou have no items to ompare.				Tax
				Grand Total
Recently Ordered				
Radiant Tee				

After clicking the button, a popup with the reasons in a dropdown is displayed. Users can select one of the existing cancellation reasons and add their own ones to a Comment field.

		Cancel Order	
	<b>Cancel Order</b> Your request will be solved in 48 hours	×	
	Choose a Reason for Order Cancellation *		Searc
Gear 🗸	I have changed my mind Choose a reason	~	
Orde April 20, 20 Reorder	I have changed my mind I bought the wrong item(s) I found a cheaper alternative I placed a duplicate order I received negative feedback about the item after purchase Delivery takes too long Other		
Cancel Order	Cancel	Submit	

Find out how to install Cancel Orders Magento 2 via Composer.

From: https://amasty.com/docs/ - Amasty Extensions FAQ	
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Last update: 2025/05/22 11:13	