



Link Guest Orders to Customer Account

Product specification

Link Orders is a Magento 2 extension developed by PIT solutions which automatically assigns guest orders to the existing customer account with the same email address during customer registration from both frontend and backend.

Features

- During customer registration, it checks if any guest order exists with that email address and if exists then it assigns that to the customer account.
- Link the guest orders placed by registered customers also to customer account.
- Automatically set default shipping and billing addresses to customer.
- Allows configuring a follow-up email for guest orders which can ask customers to register.
- Enable/ Disable the extension.
- Enable/ Disable the follow-up email in extension.
- Access control for admin users.
- All guest orders created with the customer email will be mapped to the customer when creating customer from frontend OR backend.



Installation

To install the Link Guest Orders to Customer Account Extension for Magento 2, follow the steps below.

- 1) Download the extension.
- 2) Access your web server directories and unzip and upload the content of the zip file to `app/code/Pits/LinkOrders` directory.
- 3) Run the following commands from the SSH terminal of the server to complete the installation.
 - Enable the module - `php bin/magento module:enable Pits_LinkOrders`
 - Update the database schema - `php bin/magento setup:upgrade`
 - Generate and pre-compile classes - `php bin/magento setup:di:compile`
 - Deploy static files - `php bin/magento setup:static-content:deploy`
 - Clear the cache – `php bin/magento cache:flush`

Screenshots / Video

The screenshot shows the Magento 2 admin configuration interface. On the left is a sidebar with navigation options: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled 'Configuration' and has a 'Save Config' button in the top right. The 'PITS CONFIGURATION' section is expanded to show 'Link Orders'. Under 'Link Orders', there are two sections: 'General Settings' and 'Email Configuration'. In 'General Settings', the 'Enable' dropdown is set to 'Yes'. In 'Email Configuration', the 'Enable' dropdown is also set to 'Yes', the 'Email Sender' is 'Customer Support', and the 'Email Template' is 'Guest Order Email Configuration (Default)'. There are checkboxes for 'Use system value' next to the 'Email Template' and 'Send Email Copy Method' (set to 'Bcc') options.

From the admin backend, go to **Stores > Configuration>PITS Configuration > LinkOrders**



Select **Yes** in the **Enable** dropdown option to enable the extension.

We can enable follow-up email for guest orders which asks customers to register. Select **Yes** to enable send follow-up email in the **Enable** dropdown option.

Select email sender from which follow-up emails needs to be sent from the **Email Sender** option.

Select email template for follow-up emails to be sent from the **Email Template** option.

Enter email address to which you want to send the copy of follow-up email from the **Send Email Copy To** option. In case there is more than one email, use comma to separate them.

Select copy email method from **Send Email Copy Method**. i.e. Bcc or separate email.

Click **Save Config** and clear the cache. That's it.

The screenshot shows an email interface with a header bar containing the text "Create Your Account". Below the header, the email header information is displayed: "From: CustomerSupport <[redacted]>" and "Date: 2020-06-25 12:12". On the right side of the header, there is a dropdown menu for "Encoding:" set to "worldwide (utf-8)". The main body of the email features the LUMA logo, which consists of a colorful circular icon and the word "LUMA" in a bold, sans-serif font. Below the logo, the email content begins with "Dear John," followed by a thank-you message: "Thank you for choosing [Main Website Store](#). Explore our new range of products and get updates by registering in the shop. Click the link below to register." A blue link labeled "Create Account" is provided. Below this, a section titled "When you create your account, you will be able to:" lists four benefits: "Proceed through checkout faster", "Check the status of orders", "View past orders", and "Store alternative addresses (for shipping to multiple family members and friends)". The email body concludes with a large, empty rectangular box, likely a placeholder for an image or additional content.



Create New Customer Account

Personal Information

First Name *

Last Name *

Sign Up for Newsletter

Sign-in Information

Email *

Password *

Password Strength: No Password

Confirm Password *

* Required Fields

Create an Account

My Account

- My Orders
- My Downloadable Products
- My Wish List
- Address Book
- Account Information
- Stored Payment Methods
- Billing Agreements
- My Product Reviews
- Newsletter Subscriptions

Compare Products

You have no items to compare.

My Wish List

You have no items in your wish list.

My Account

Account Information

Contact Information

John Doe
johndoe@yopmail.com
[Edit](#) | [Change Password](#)

Newsletters

You aren't subscribed to our newsletter.
[Edit](#)

Address Book [Manage Addresses](#)

Default Billing Address

John Doe
My Company
Ivy Road
Houston, Texas, 78415
United States
T: 555-1234
[Edit Address](#)

Default Shipping Address

John Doe
My Company
Ivy Road
Houston, Texas, 78415
United States
T: 555-1234
[Edit Address](#)

Recent Orders [View All](#)

Order #	Date	Ship To	Order Total	Status	Action
00000015	6/25/20	John Doe	\$104.00	Pending	View Order Reorder

All guest orders created with the customer email will be mapped to the customer when creating customer from frontend OR backend.



- CUSTOMER INFORMATION
- Customer View
- Account Information**
- Addresses
- Orders
- Shopping cart
- Newsletter
- Billing Agreements
- Product Reviews
- Wish List

Account Information

Associate to Website * Main Website ?

Group * General Disable Automatic Group Change Based on VAT ID

Name Prefix

First Name * Test

Middle Name/Initial

Last Name * Link Order2no.2

Name Suffix

Email * testlinkorder1@yopmail.com

Allow remote shopping assistance Nein

Date of Birth

Tax/VAT Number

Gender

Send Welcome Email From Default Store View

- CUSTOMER INFORMATION
- Customer View
- Account Information
- Addresses
- Orders**
- Shopping cart
- Newsletter
- Billing Agreements
- Product Reviews
- Wish List

Suche [Reset Filter](#) 2 records found 20 per page 1 of 1

Order #	Purchased	Bill-to Name	Ship-to Name	Order Total	Purchase Point	Action
<input type="text"/>	From <input type="text"/> To <input type="text"/>	<input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>	<input type="text"/>	
000000008	06.01.2023, 05:21:26			50,00 \$	Main Website Main Website Store Default Store View	Reorder
000000007	06.01.2023, 05:09:47			39,00 \$	Main Website Main Website Store Default Store View	Reorder

All guest orders created with the customer email will be mapped to the customer when creating customer from frontend OR backend

Resource access control for admin users can be done for Link Order configuration.



Go to Admin > System > User Roles

The screenshot shows the Magento Admin System menu. The 'User Roles' option is highlighted with a red box. The menu items are:

- Data Transfer
- Import
- Export
- Import/Export Tax Rates
- Import History
- Extensions
- Integrations
- Tools
- Cache Management
- Backups
- Index Management
- Web Setup Wizard
- Permissions
- All Users
- Locked Users
- Action Logs
- Bulk Actions
- Other Settings
- Notifications
- Custom Variables
- Manage Encryption Key

Add a new role resource

New Role

The 'New Role' form is displayed. It has a sidebar with 'ROLE INFORMATION' and 'Role Info' selected. The main form has two sections:

- Role Information**: Role Name * admin
- Current User Identity Verification**: Your Password *

Select **LinkOrders** role at Role Resources section.



New Role

← Back Reset Save Role

- Stores
 - Settings
 - All Stores
 - Configuration
 - Google API
 - Newsletter Section
 - Contacts Section
 - Payment Services
 - Payment Methods Section
 - Inventory Section
 - Catalog Section
 - Content Management
 - Fraud Protection Section
 - dotdigital
 - MagePal SMTP App
 - Downloadable Product Section
 - Shipping Methods Section
 - Shipping Policy Parameters Section
 - Shipping Settings Section
 - Multishipping Settings Section
 - Link Orders
 - General Section
 - Web Section
 - Security Suite
 - Design Section
 - PayPal Section
 - Customers Section
 - Tax Section
 - Checkout Section
 - Persistent Shopping Cart
 - Sales Section

Set role users for admin accounts, then click on Save Role to finish.



Technical Requirements / Compatible with:

Magento Open Source (CE) 2.3.x, 2.4.x

Supported Languages

English, German and easily customizable for other Magento supported language packs.

Change Log / Release Notes

Version: 1.0.7: July 2024

- Compatible with Open Source (CE): 2.4.7-p1

Version: 1.0.6: April 2023

- Compatible with Open Source (CE): 2.4.6

Version: 1.0.5: January 2023

- Link orders to customer account while adding customer from backend

Version: 1.0.4: November 2022

- Compatible with Open Source (CE): 2.4.5
- Link the guest orders placed by registered customers also to customer account.

Version: 1.0.3: June 2022

- Compatible with Open Source (CE): 2.4.4

Version: 1.0.2: January 2022

- Compatible with Open Source (CE): 2.4.3.
- Bug Fix – Params of the link in the Follow-up email received during the guest order creation to create an account are encrypted.

Version: 1.0.1: January 2021

- Compatible with Open Source (CE): 2.4.x.



Bug Fix - Follow-up email to create account is again sent for registered users when they place order as guest.

Version: 1.0.0: June 2020

- Added admin configuration option to enable or disable the module.
- Added auto assign past guest orders to customer during registration.
- Added email configuration for admin users.
- Added access control for admin users.

Support

If you have questions, use our contact form in webshopextension.com.