



User Manual

Share Order Extension for Magento 2

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1. Product Specification

The Share Order Extension for Magento 2 is designed to streamline the process of sharing order details through email, making it simple for customers to communicate their purchase information. It is integrated into the order success and order history pages; this feature allows customers to effortlessly share their order details with friends, family, or colleagues. Whether celebrating a recent purchase or coordinating with others, the extension makes it easy to share order information without any hassle.

When customers choose to share their order via email, the recipient receives an email. The email redirects the recipient to a shared order page, where they can view all the relevant details of the purchase. This functionality not only simplifies the sharing process and makes it easy for recipients to understand the order's contents.

By facilitating email sharing with a direct link to the order page, the extension enhances customer engagement and provides a seamless way for customers to involve others in their shopping experience. This convenience helps build a stronger connection between the customer and the store, encouraging further interaction and potentially leading to increased traffic and sales.

2. Features

- **Order to E-mail Sharing with Secure Access:** The extension allows customers to share their order details via email. This email directs them to a secure shared order page, ensuring that order information is protected.
- **OTP Verification for Guest Users:** If the recipient does not have an account in the store, they must undergo a One-Time Password (OTP) verification process. This added layer of security ensures that only the intended recipient can view the order details, safeguarding customer information.
- **Login Requirement for Account Holders:** If the recipient has an account in the store, they will be prompted to log in before accessing the shared order page.
- **User-Friendly Interface:** Despite the added security measures, the extension maintains a user-friendly experience. Whether through OTP verification or login,

the process is designed to be straightforward and quick, ensuring that recipients can access the order information with minimal hassle.

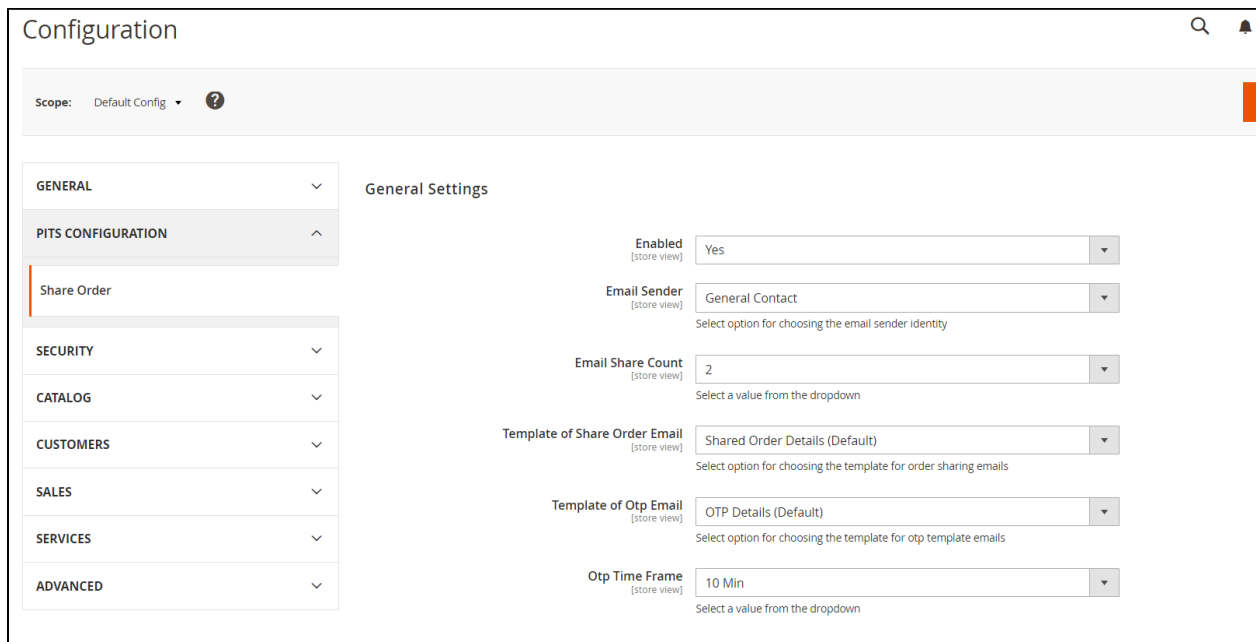
3. Installation

To install the Share Order Extension for Magento 2, follow the steps below. Please ignore the steps 1 & 2 if you are installing the extension using composer.

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

4. Admin Panel Configuration

Navigate to *Admin > Store > Configuration > Pits Configuration > Share Order*.



The screenshot shows the 'Configuration' page for the 'Share Order' extension. The left sidebar contains a menu with categories: GENERAL, PITS CONFIGURATION, SECURITY, CATALOG, CUSTOMERS, SALES, SERVICES, and ADVANCED. The 'PITS CONFIGURATION' category is expanded, showing 'Share Order' as the selected option. The main content area is titled 'General Settings' and contains the following configuration fields:

- Enabled** (store view): A dropdown menu set to 'Yes'.
- Email Sender** (store view): A dropdown menu set to 'General Contact'. Below it is the text: 'Select option for choosing the email sender identity'.
- Email Share Count** (store view): A dropdown menu set to '2'. Below it is the text: 'Select a value from the dropdown'.
- Template of Share Order Email** (store view): A dropdown menu set to 'Shared Order Details (Default)'. Below it is the text: 'Select option for choosing the template for order sharing emails'.
- Template of Otp Email** (store view): A dropdown menu set to 'OTP Details (Default)'. Below it is the text: 'Select option for choosing the template for otp template emails'.
- Otp Time Frame** (store view): A dropdown menu set to '10 Min'. Below it is the text: 'Select a value from the dropdown'.

Figure 1 – Share Order – Configuration

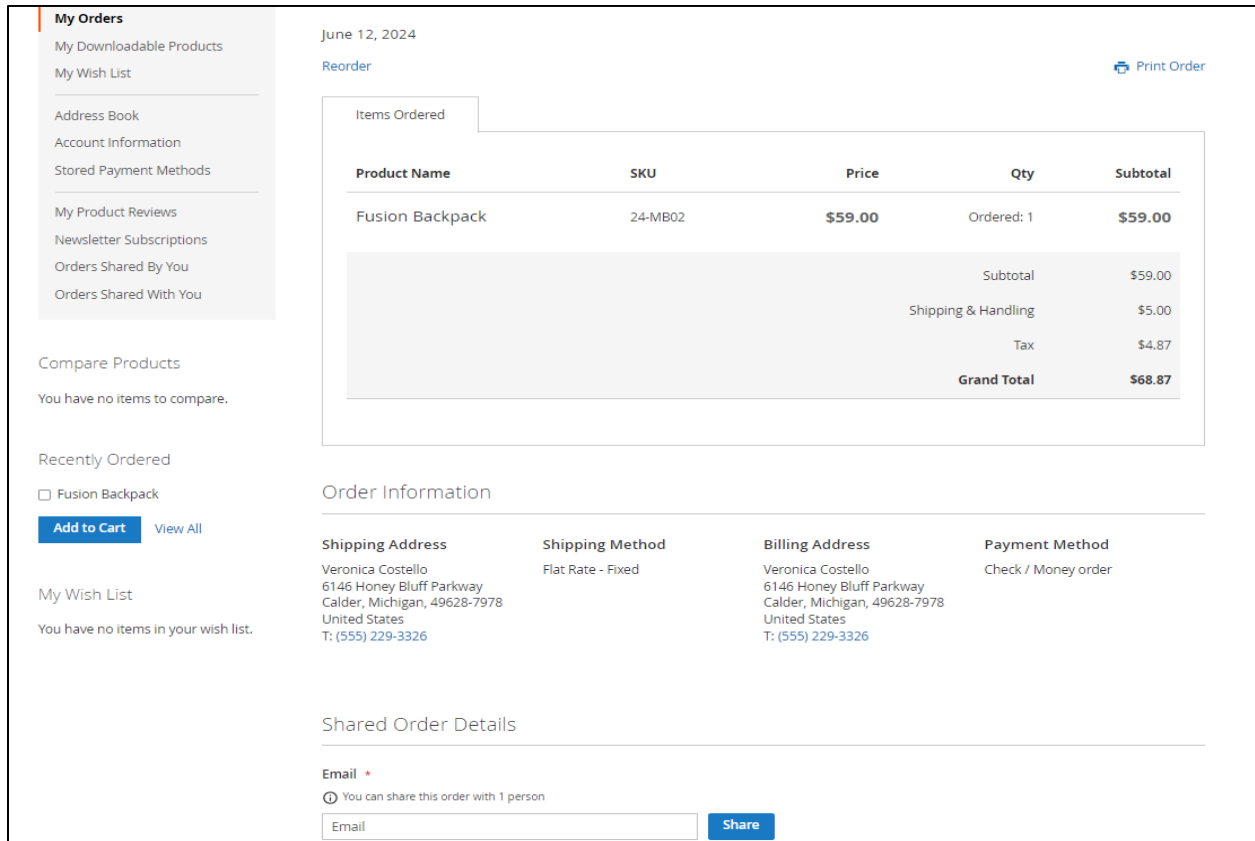
Figure 1 displays the admin configurations of the extension

The **General Settings** encompass the following fields

- **Enabled** – Enable / Disable module.
- **Email Sender** – Options to choose the identity from which emails are sent.
- **Email Share Count** – No of emails to which order can be shared.
- **Template of Share Order Email** – Selects the template for sharing of emails.
- **Template of OTP Email** – Selects the template for OTP (One-Time Password) sharing emails.
- **OTP Time Frame** – Select the time frame for OTP verification.

5. How it Works in Frontend

- On the order success and order history pages, customers can see a "Share" button, allowing them to enter an email address to share their order details.



The screenshot displays the 'My Orders' page for a user. On the left is a navigation sidebar with options like 'My Downloadable Products', 'My Wish List', 'Address Book', and 'Account Information'. The main content area shows an order for 'June 12, 2024'. A table lists the items ordered, including a 'Fusion Backpack' with SKU '24-MB02' and a price of '\$59.00'. A summary table shows a subtotal of \$59.00, shipping and handling of \$5.00, tax of \$4.87, and a grand total of \$68.87. Below this is the 'Order Information' section with details for shipping, billing, and payment. At the bottom, the 'Shared Order Details' section includes an 'Email' input field and a 'Share' button.

| Product Name | SKU | Price | Qty | Subtotal |
|-----------------|---------|---------|------------|----------|
| Fusion Backpack | 24-MB02 | \$59.00 | Ordered: 1 | \$59.00 |

| | |
|---------------------|----------------|
| Subtotal | \$59.00 |
| Shipping & Handling | \$5.00 |
| Tax | \$4.87 |
| Grand Total | \$68.87 |

Order Information

| Shipping Address | Shipping Method | Billing Address | Payment Method |
|---|-------------------|---|---------------------|
| Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326 | Flat Rate - Fixed | Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326 | Check / Money order |

Shared Order Details

Email *
 You can share this order with 1 person
 Email

Figure 2 – Share Order – Order History Page

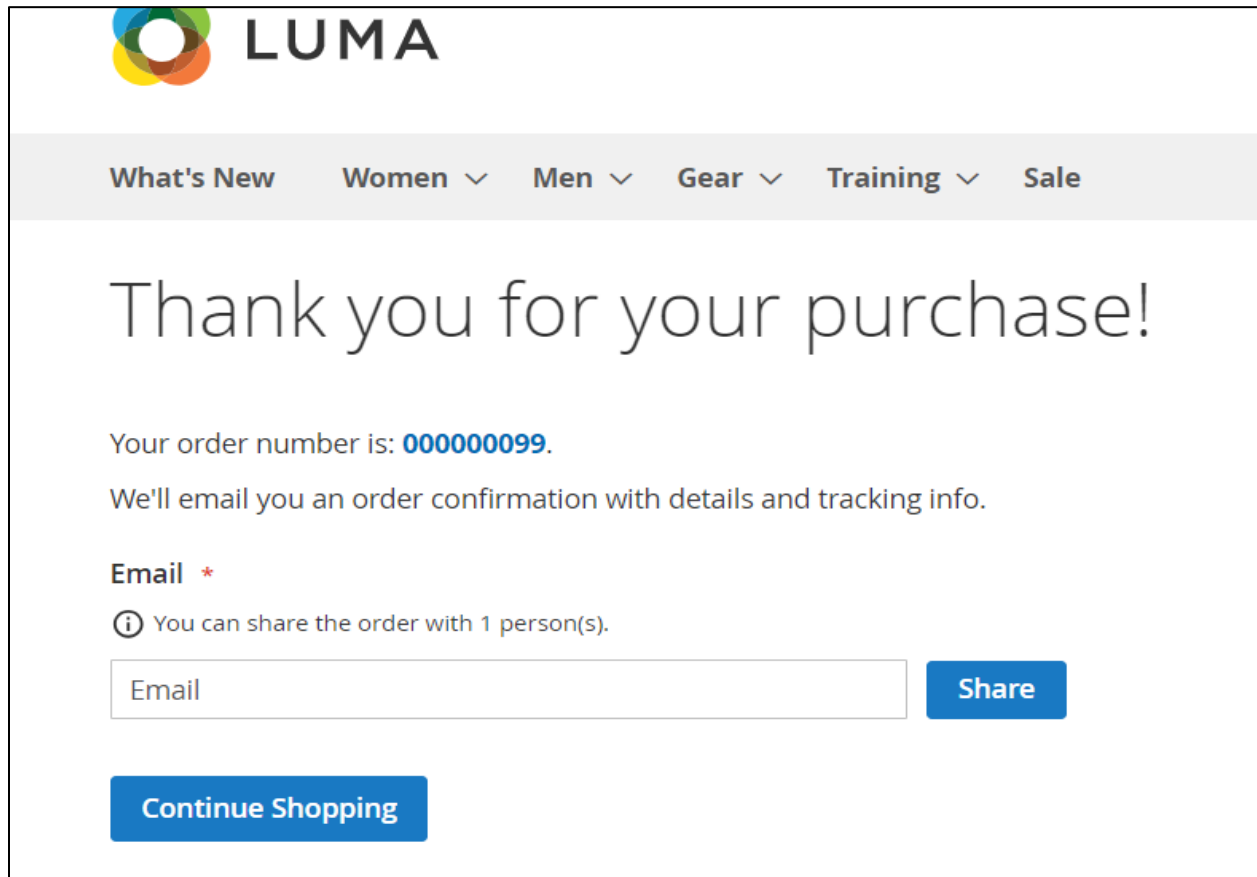


Figure 3 – Share Order – Order Success Page

- The recipient receives an email that redirects them to a secure shared order page.
- OTP verification will be required for recipients without an account, while account holders will be prompted to log in.
- Once the OTP is verified or the recipient is logged in, they will be directed to the shared order page, where they can view all relevant order details.
- Additionally, orders shared by the customer are listed under the "Order Shared By You" tab, and orders shared with the customer are listed under the "Order Shared With You" tab in the My Account page.

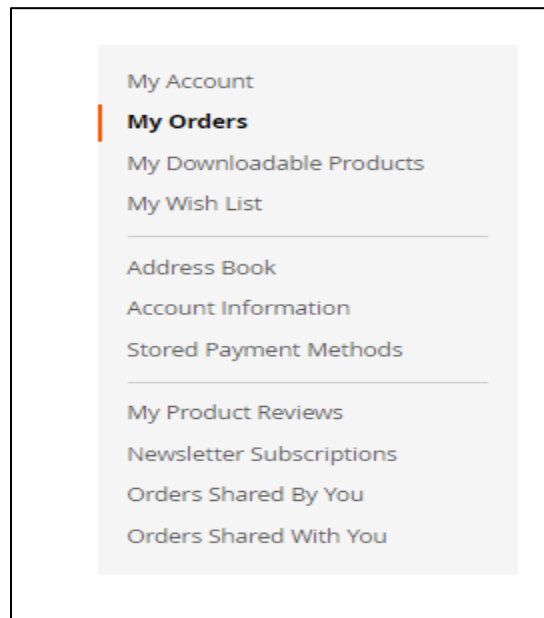


Figure 4 – My Account Page

- The "Order Shared By You" tab provides a record of the orders the customer has shared with others.

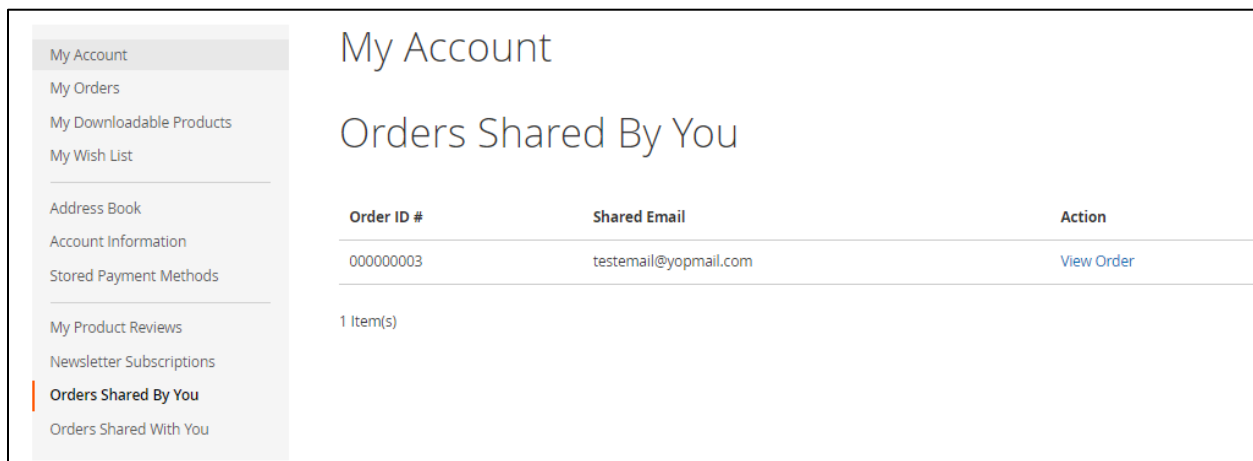
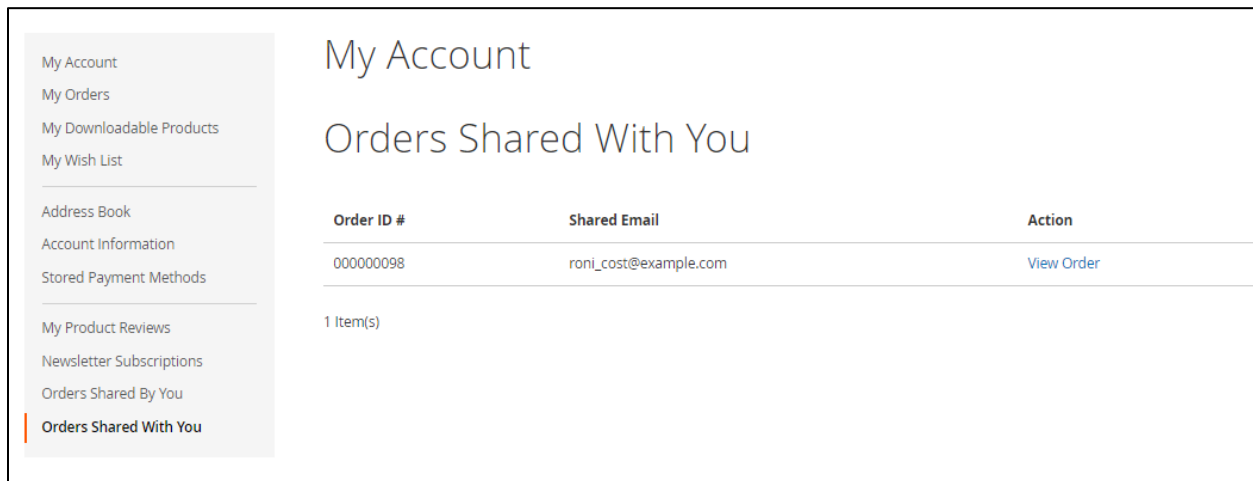


Figure 5 – Orders Shared By You Page

- The "Order Shared With You" tab displays a record of the orders that have been shared with the customer by others.



The screenshot shows a user's account page with a sidebar menu on the left and a main content area. The sidebar menu includes: My Account, My Orders, My Downloadable Products, My Wish List, Address Book, Account Information, Stored Payment Methods, My Product Reviews, Newsletter Subscriptions, Orders Shared By You, and Orders Shared With You (highlighted). The main content area has the heading 'My Account' and a sub-heading 'Orders Shared With You'. Below this is a table with three columns: Order ID #, Shared Email, and Action. The table contains one row with the following data: Order ID # 000000098, Shared Email roni_cost@example.com, and Action View Order. Below the table, it indicates '1 Item(s)'.

| Order ID # | Shared Email | Action |
|------------|-----------------------|----------------------------|
| 000000098 | roni_cost@example.com | View Order |

1 Item(s)


Figure 6 – Orders Shared With You Page

- The "View Order" action in both tabs redirects the customer to the order details page, where they can view the shared order's details. Additionally, the extension allows the customer to view related products associated with the ordered items.

Order # 000000098 PENDING

August 16, 2024

Items Ordered

| Product Name | SKU | Price | Qty | Subtotal |
|--|---------|---------|------------|----------------|
|  Wayfarer Messenger Bag | 24-MB05 | \$45.00 | Ordered: 1 | \$45.00 |
| Subtotal | | | | \$45.00 |
| Shipping & Handling | | | | \$5.00 |
| Grand Total | | | | \$50.00 |

Order Information

| Shipping Address | Shipping Method | Billing Address | Payment Method |
|--|-------------------|--|---------------------|
| Tester Tester Test Street Test City, Alaska, 12345 United States T: 1234567890 | Flat Rate - Fixed | Tester Tester Test Street Test City, Alaska, 12345 United States T: 1234567890 | Check / Money order |

Related Products




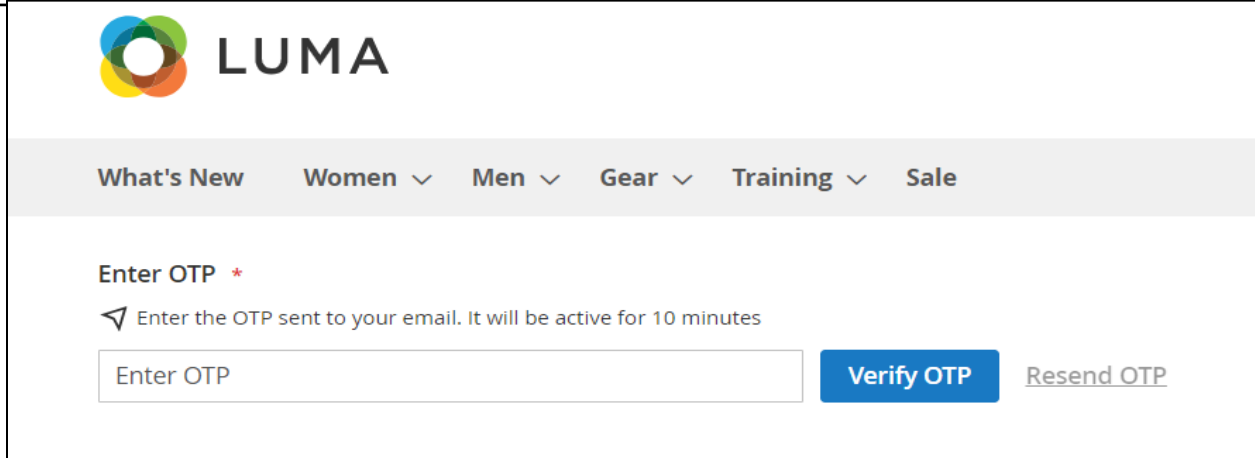
| | | |
|---|---|---|
|  |  |  |
| Joust Duffle Bag \$34.00 | Strive Shoulder Pack \$32.00 | Crown Summit Backpack \$38.00 |

Figure 7 – View Order Page

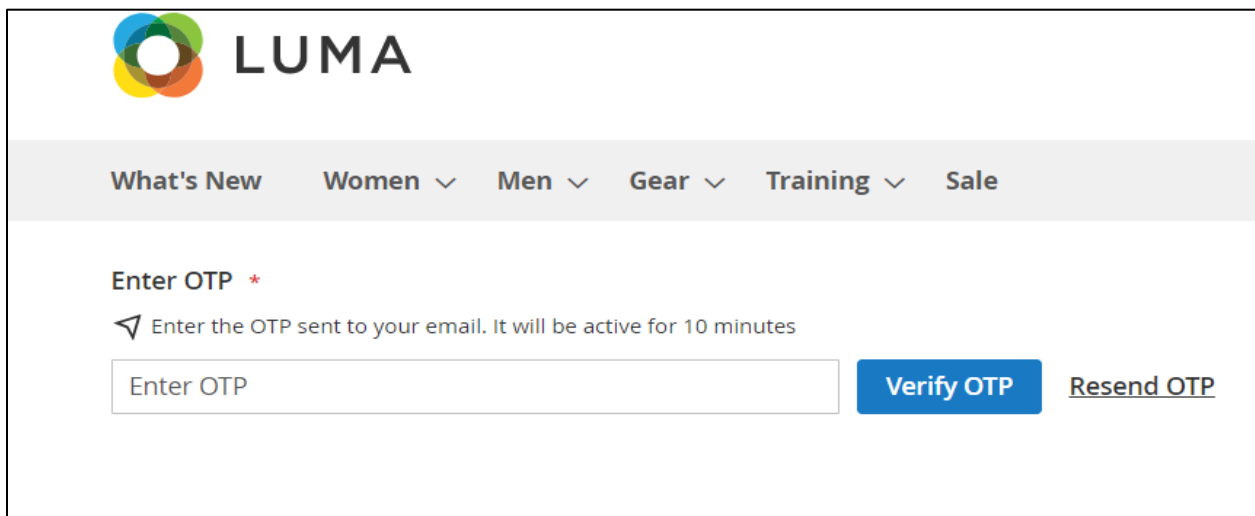
6. OTP Verification for Guest Recipients

- **OTP Sent to Email:** When a guest recipient proceeds to see the order shared to their email, an email with OTP (One-Time Password) is sent to their email address.



The screenshot shows the LUMA website header with navigation links: What's New, Women, Men, Gear, Training, and Sale. Below the header is the OTP verification section. It includes the text "Enter OTP *", a message "Enter the OTP sent to your email. It will be active for 10 minutes", an input field labeled "Enter OTP", a blue "Verify OTP" button, and a greyed-out "Resend OTP" link.

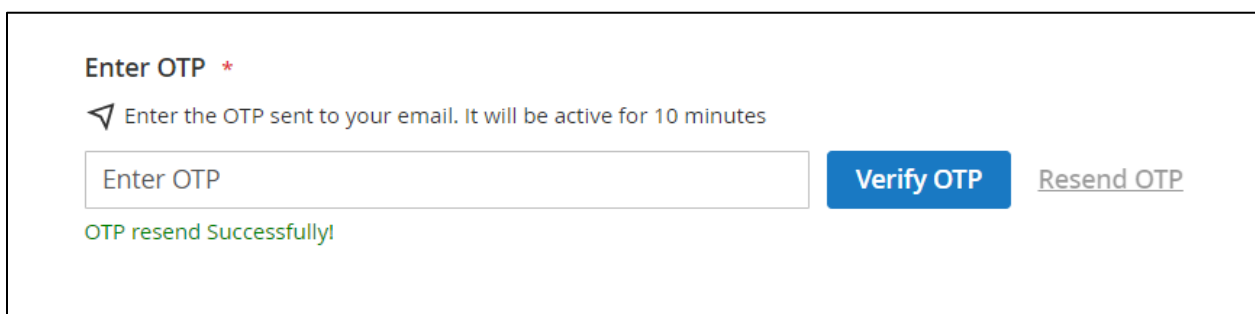
Figure 8 – OTP Verification Page (Resend OTP link not active)



The screenshot shows the LUMA website header with navigation links: What's New, Women, Men, Gear, Training, and Sale. Below the header is the OTP verification section. It includes the text "Enter OTP *", a message "Enter the OTP sent to your email. It will be active for 10 minutes", an input field labeled "Enter OTP", a blue "Verify OTP" button, and an active "Resend OTP" link.

Figure 9 – OTP Verification Page (Resend OTP link active)

- **Resend OTP Option:** If the recipient does not receive the email, they have the option to resend the OTP up to 3 times.



The screenshot shows the LUMA website header with navigation links: What's New, Women, Men, Gear, Training, and Sale. Below the header is the OTP verification section. It includes the text "Enter OTP *", a message "Enter the OTP sent to your email. It will be active for 10 minutes", an input field labeled "Enter OTP", a blue "Verify OTP" button, and an active "Resend OTP" link. A green message "OTP resend Successfully!" is displayed below the input field.


Figure 10 – OTP Verification Page (Resend OTP Successful)

- **OTP Verification:** The recipient must enter the OTP to verify their access to the order details.
- **Access Granted Upon Verification:** Once the OTP is successfully entered and verified, the recipient can view the order details.
- **Timeout Handling:** If the recipient does not verify the OTP within the specified time frame, they will be redirected to the homepage.

Order # 000000003 PENDING

June 12, 2024


Items Ordered

| Product Name | SKU | Price | Qty | Subtotal |
|--|---------|---------|------------|----------------|
|  Fusion Backpack | 24-MB02 | \$59.00 | Ordered: 1 | \$59.00 |
| Subtotal | | | | \$59.00 |
| Shipping & Handling | | | | \$5.00 |
| Tax | | | | \$4.87 |
| Grand Total | | | | \$68.87 |


Order Information

| | | | |
|---|--|--|---|
| <p>Shipping Address</p> <p>Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326</p> | <p>Shipping Method</p> <p>Flat Rate - Fixed</p> | <p>Billing Address</p> <p>Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326</p> | <p>Payment Method</p> <p>Check / Money order</p> |
|---|--|--|---|


Related Products



Joust Duffle Bag
\$34.00



Strive Shoulder Pack
\$32.00



Crown Summit Backpack
\$38.00

Figure 11 – Order View Page after OTP Verification

7. Technical Requirements / Compatible With:

- Magento Open Source 2.3.7.x, 2.4.x

8. Supported Languages:

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

9. Changes Log / Release Notes

Version: 1.0.0: November 2024

- Initial release.

10. Support

If you have questions, use our contact form at webshopextension.com or email at support@webshopextension.com.