



Link Guest Orders to Customer Account

Pre-requisites

Magento Community 2.0.x, 2.1.x, 2.2.x, 2.3.x, 2.4.x

Installation

To install the module follow the steps below.

Step 1: Download the module/extension and unzip it.

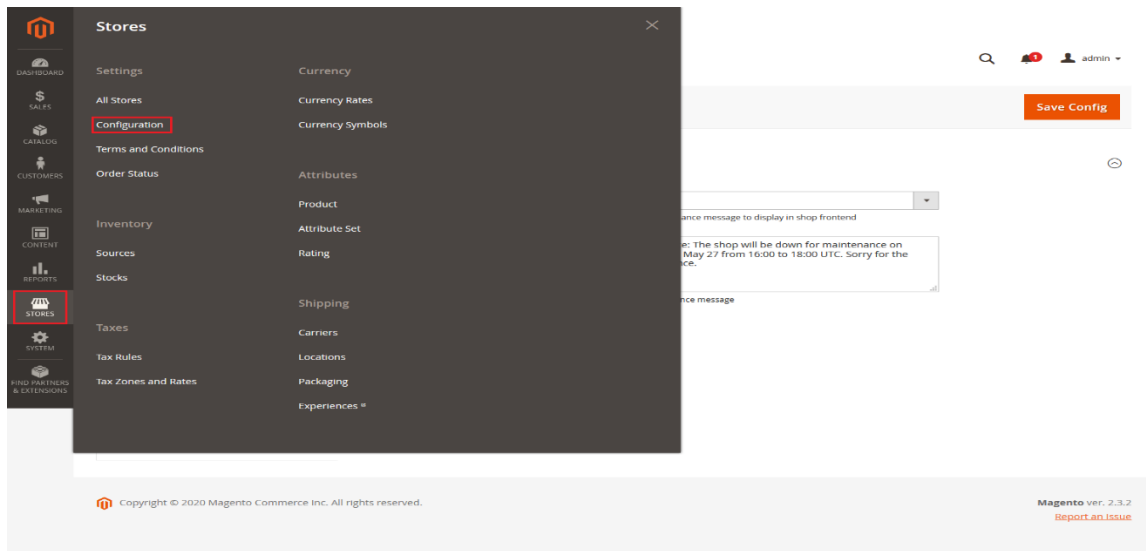
Step 2: Access your web server directories and upload the content of the folder into `app/code/Pits/LinkOrders/` directory.

Step 3: Run the following commands to complete the installation.

1. Enable the module - `php bin/magento module:enable`
2. Update of the database - `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`

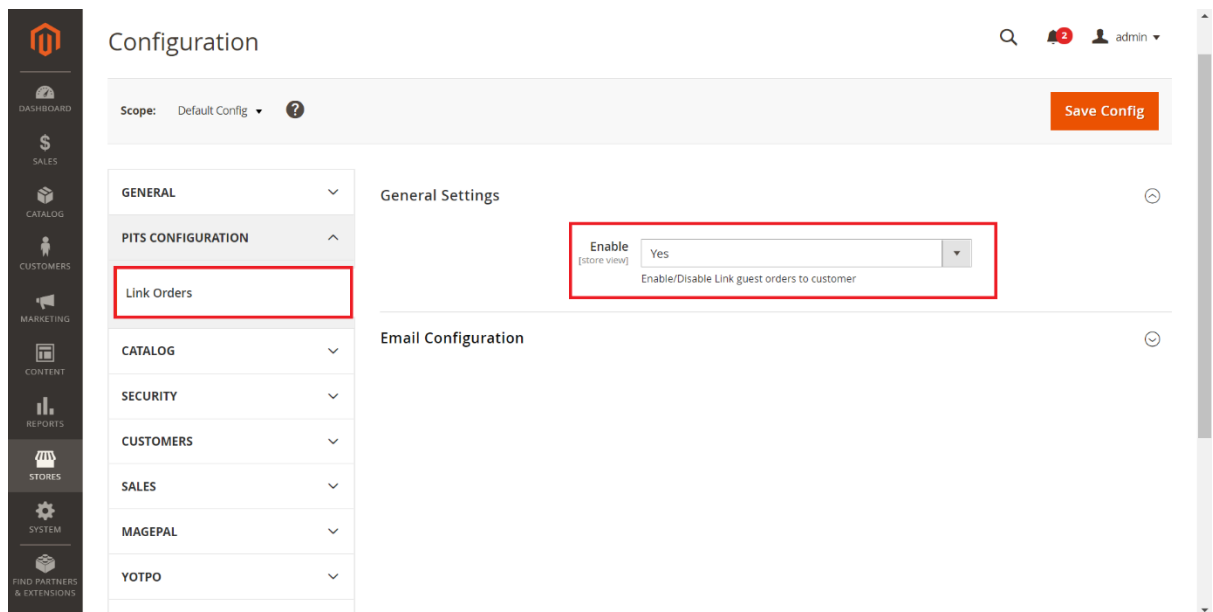
Configuration

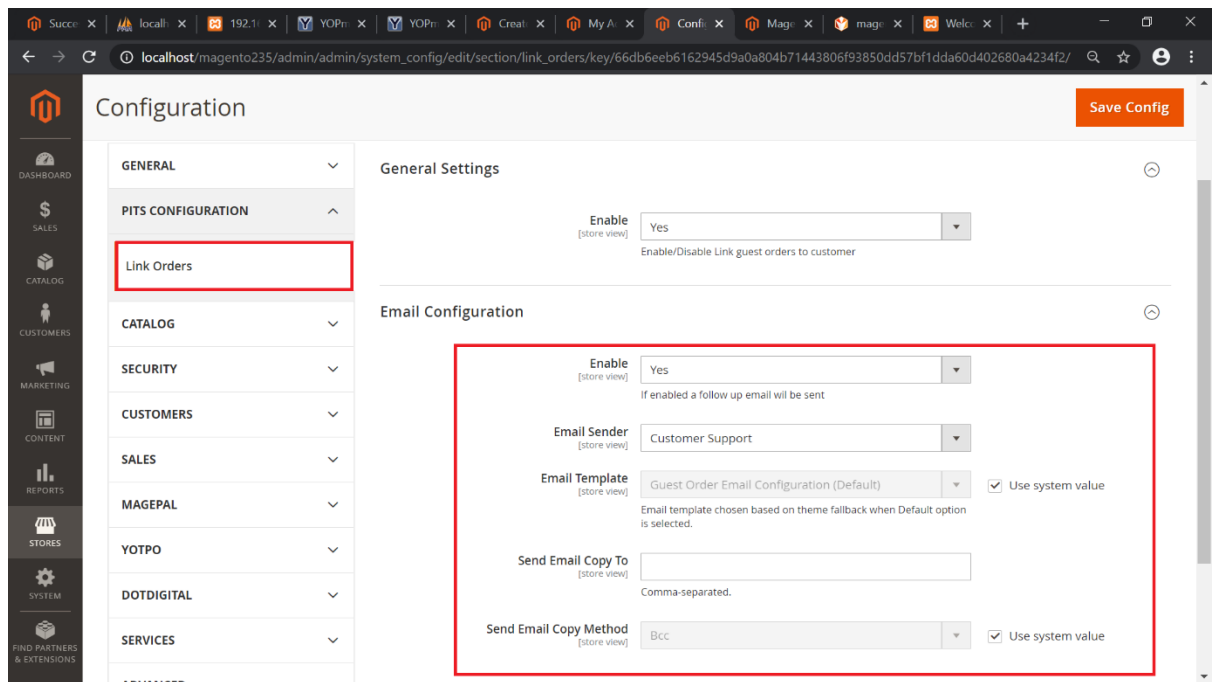
From the admin backend, go to **Stores > Configuration>PITS Configuration > LinkOrders**



Configure Link Orders

- Enable the module.
 1. Select **Yes** in the **Enable** dropdown option.





2. Select **Yes** to enable send follow-up email in the **Enable** dropdown option.
3. Select email sender from which follow-up emails needs to be sent from the **Email Sender** option.
4. Select email template for follow-up emails to be sent from the **Email Template** option.
5. 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.
6. Select copy email method from **Send Email Copy Method**. i.e. Bcc or separate email.
7. Click **Save Config** and clear the cache. That's it.




Follow-up Email Template

When a guest user places an order a follow-up email will be sent to that user regarding account creation.

Below is the template of a follow-up email send to a customer who placed a guest order.

Create Your Account
From: CustomerSupport <[redacted]>
Date: 2020-06-25 12:12

Encoding: worldwide (utf-8) ▾



LUMA

Dear John,

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.

[Create Account](#)

When you create your account, you will be able to:

- Proceed through checkout faster
- Check the status of orders
- View past orders
- Store alternative addresses (for shipping to multiple family members and friends)



Creating New Account

When the user clicks 'Create Account' button from email (mentioned in the previous image), he lands on the sign up page with a form already filled with his information.

Create New Customer Account

Personal Information

First Name *
John

Last Name *
Doe

Sign Up for Newsletter

Sign-in Information

Email *
johndoe@yopmail.com

Password *
Password Strength: No Password

Confirm Password *

* Required Fields

[Create an Account](#)

As soon as the customer creates an account, the extension starts looking for the guest orders linked with the customer's email address. If any such guest orders are found, they will be assigned to the customer account. Also, the billing and shipping address from customer's last order will be assigned to the same.

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](#)

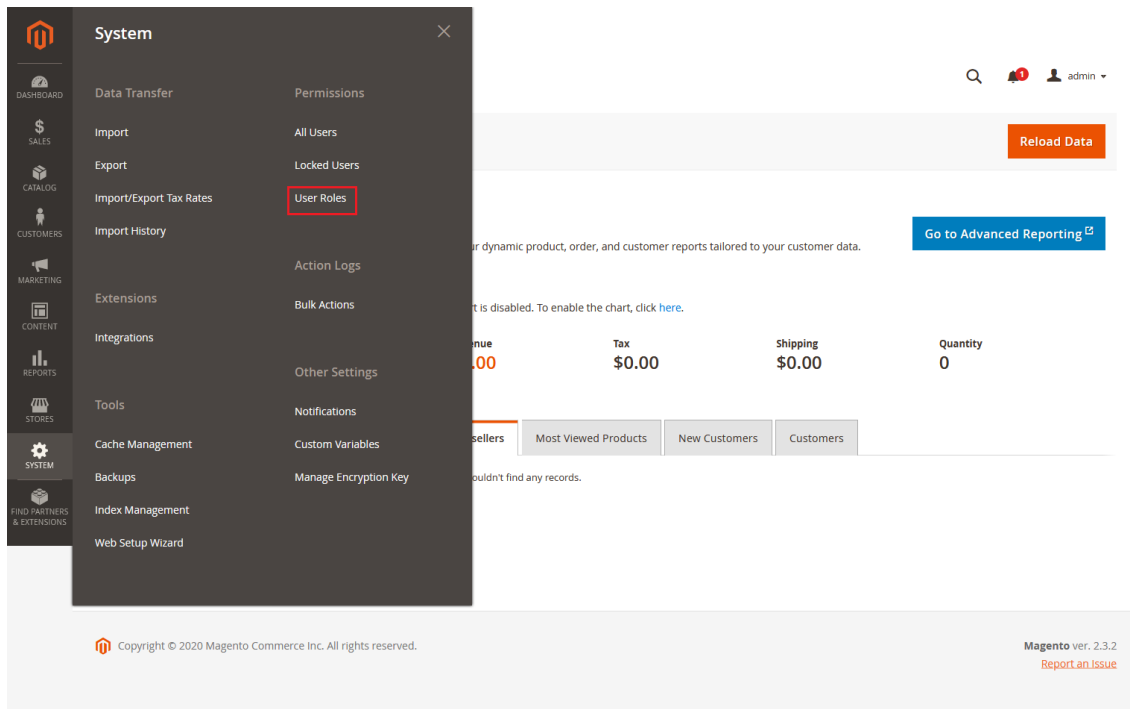
Order #	Date	Ship To	Order Total	Status	Action
00000015	6/25/20	John Doe	\$104.00	Pending	View Order Reorder



Note: When an already registered customer tries to place an order without signing in magento detects if he enters email id in checkout page and provides options to login or continue as a guest.

Manage User Role

Step 1: Go to Admin > System > User Roles

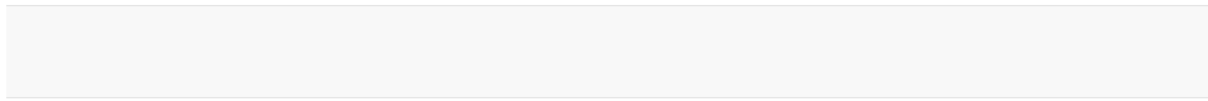


Step 2: Add a new role resource

Fill in the role information section.



New Role



ROLE INFORMATION

Role Info

Role Resources

Role Information

Role Name *

Current User Identity Verification

Your Password *

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

The screenshot shows the 'New Role' page with a sidebar on the left containing navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main area displays a tree view of resources under the 'Stores' category. The 'Link Orders' resource is highlighted with a red box. At the top right of the main area, there are buttons for 'Back', 'Reset', and 'Save Role'.

Step 3: Set role users for admin accounts, then click on **Save Role** to finish.

Support

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