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

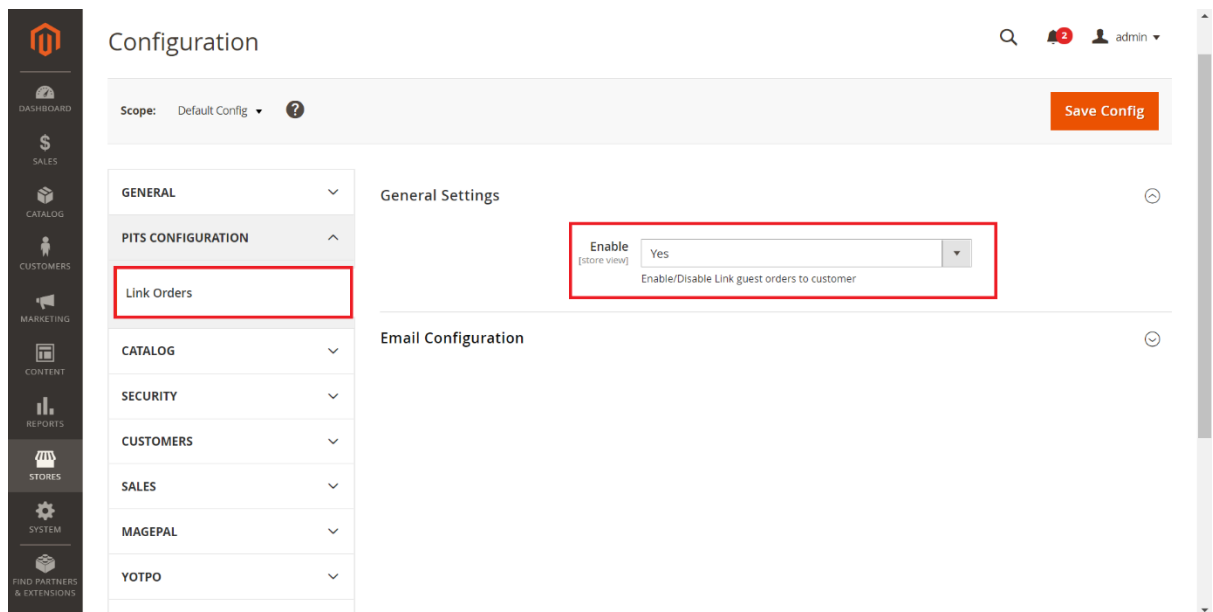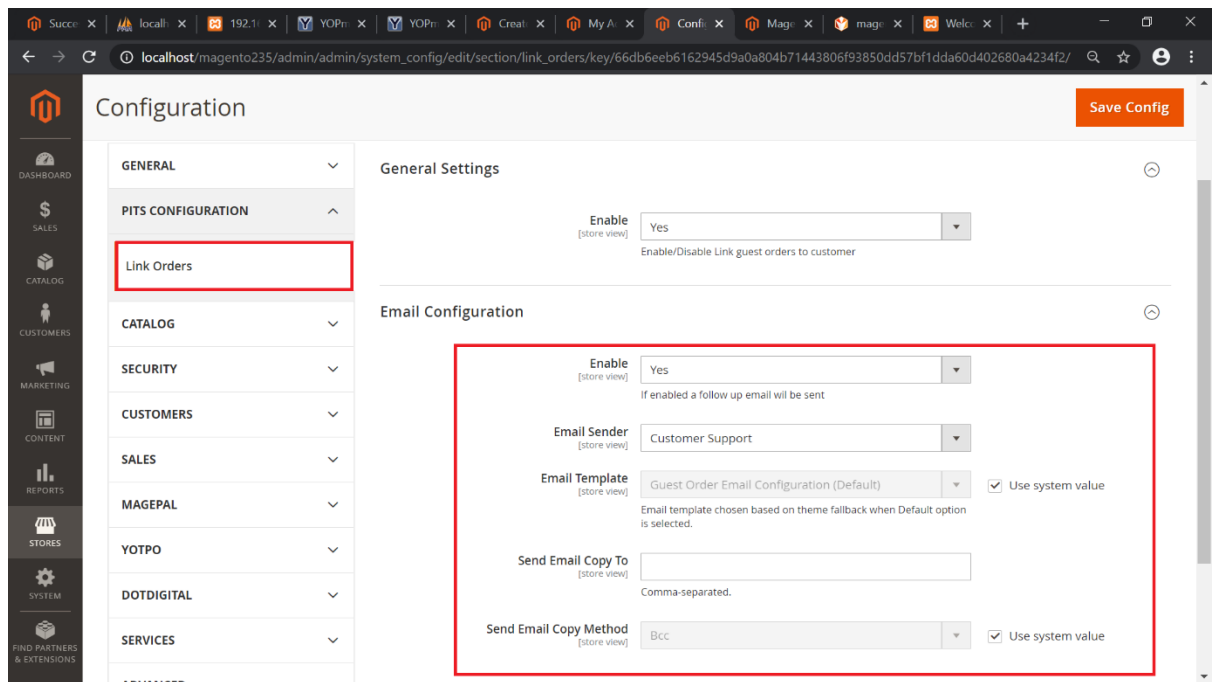4. Deploy static files - php bin/magento setup:static-content:deploy

Configuration

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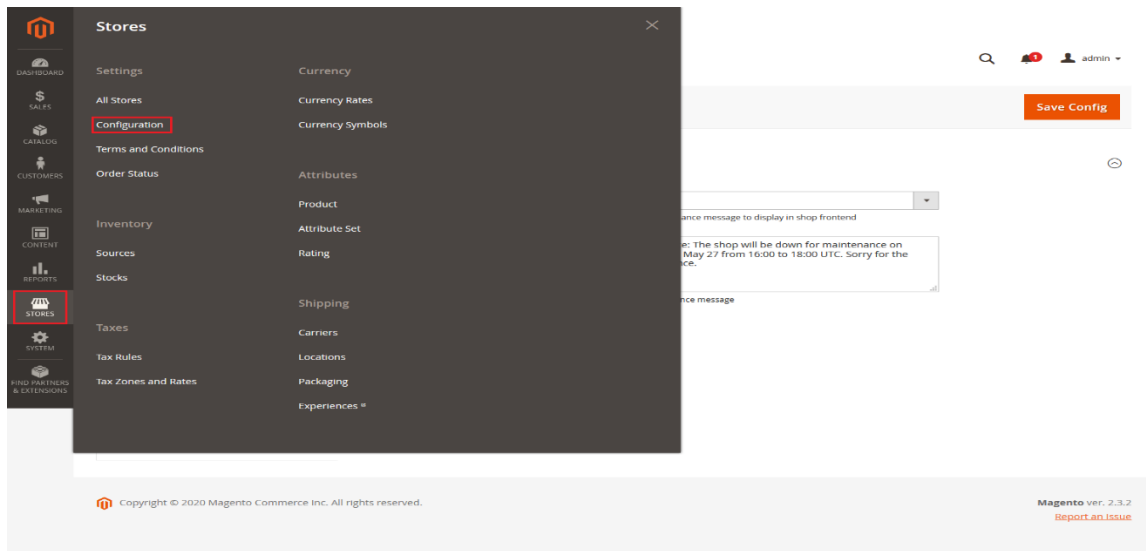
Configure Link Orders

- 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.

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.

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.

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**
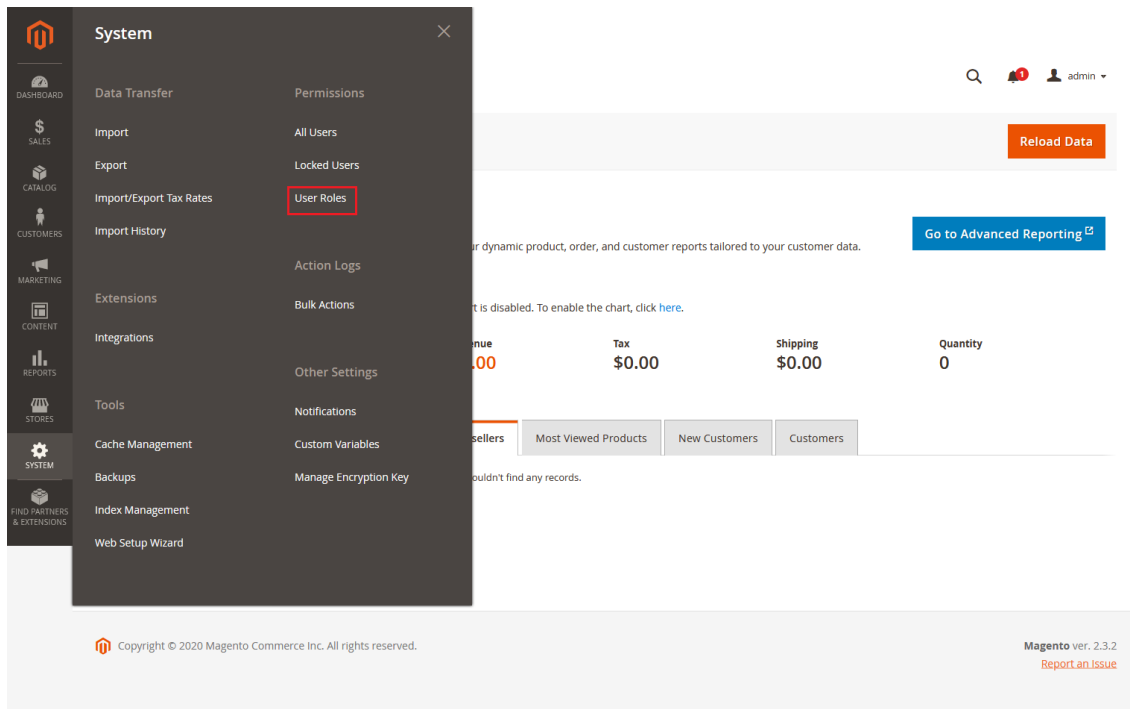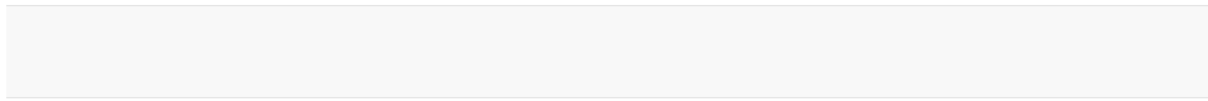

Step 2: Add a new role resource

Fill in the role information section.

New Role

ROLE INFORMATION

Role Info

Role Resources

Role Information

Role Name ∗   admin

Current User Identity Verification

Your Password ∗   ••••••••

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

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

Support

If you have questions use our contact form in <u>webshopextension.com.</u>