

GUEST CHECKOUT TO REGISTERED CUSTOMERS
FOR MAGENTO 2



User Guide

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Extension Overview

Magento 2 is a great shopping cart system with an excellent one page checkout. Unfortunately many other shopping carts out there have a very long checkout process. Ecommerce shoppers like myself generally do not want to enter additional information, set up additional accounts; so they opt for guest checkout and as a ecommerce store owner you are aware many customers have a change of heart and like to be able to get status updates about their order. This extension now gives you the ability to convert guest checkout customers to general/wholesale/etc any customer group of your choice. Everything is integrated in magento 2 admin and it displays a list of guest checkout orders available for conversion and you can select which customers/orders you want to convert and on conversion a new password is generated and that user is emailed the information (see attached screenshots). All order information and customer information is transferred over.

FEATURES:

- Ability to convert guests and their guest orders to customer manually via magento admin
- Optional choice of adding a button to successful checkout page for users to optionally convert to an account if they decide they want it after checkout is complete
- Ability to automatically convert guests / guest orders to customer account at time of checkout. You can enable/disable this option via magento admin
- Ability to convert guest checkout customers to general/wholesale/etc any customer group of your choice.

Extension Installation

1. Log out from Magento Admin panel if you are logged in
2. Unpack the contents of the zip file purchased and VIA ftp and upload the app folder to your magento install root.
3. Login via SSH and Clear cache using command
`php -f bin/magento cache:flush`
4. After uncompressing the guest to registered customer import/export package (zip file), you should have one folder: app

Upload everything in the app/* folder to your app/* folder.

5. SSH into your magento server and run command via ssh in root of magento install to install module

```
php -f bin/magento setup:upgrade
```

and

```
php -d memory_limit=1024M -f bin/magento setup:di:compile
```

Extension Usage

To use the extension it is pretty straight forward just select the guest customers/orders you want to convert to registered customer account and what customer group to create for the new customers and click “Submit form” (see below)

The screenshot displays the 'Guests To Registered Customers' interface. At the top, there is a search bar and a 'Reset Filter' button. Below this, a table lists two records. The first record has an order number of 00000004, purchased on 04/22/2016 at 11:46:32 AM, with a first name of Scott and a last name of Bilswech. The second record has an order number of 00000002, purchased on 04/22/2016 at 11:38:03 AM, with a first name of test and a last name of test. Both records have a status of 'Pending' and an action of 'View Order'. The interface also includes a sidebar on the left with various navigation icons and a footer with copyright information for Magento Commerce Inc.

You can also turn adjust settings in magento admin stores -> configuration. On the left hand tab look for “**Guests To Customers**” (see below)

The screenshot shows the 'Configuration' page for the 'Guests To Registered Customers' extension. The left sidebar contains a list of configuration categories, with 'CUSTOMERS' selected. The main content area displays the following settings:

- Enable Automatic Guest to Customer Account At Checkout:** Set to 'No'.
- Disable New Customer Email:** Set to 'No'.
- Select Customer Group (only used for automatic merge):** Set to 'NOT LOGGED IN'.
- Email Sender:** Set to 'General Contact'.
- Email Template:** Set to 'Notify email sending (Default)'.
- Email Recipients (BCC):** A text input field for additional email addresses, with a note: 'comma separated list of email addresses'.

A 'Save Config' button is located in the top right corner of the configuration area.

Email Sender: Configure who the email template is being sent from. Default is general contact

Email Template: Select the email template used that will be send to notify a user they have been converted to a customer.

Email Receipts: Here you can add (BCC) any additional email address on this email notification

Support

CommerceExtensions offers 1 hr of EMAIL support and updates for 6 months for all extension developed for Magento.

If you need support related to CommerceExtensions extension usage, feel free to contact me at scottbolasevich@gmail.com