USER GUIDE

Version 1.0.1

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1. About Extension

Magento 2 convert guest to customer extension improves the customer experience without forcing users to log in to successfully place an order. This extension enables you to automatically convert guests to customers after checkout. After successful checkout, guests are displayed in a separate grid and admin can convert them to customers in a single click. Admin can also convert guests to customers from the order detail page.

2. Feature List

- Auto Convert Guest To Customers
- Convert Guests to Customers Manually
- Convert Guest to Customer from Order Detail Page
- Assign Customer Group to Converted Customers
- Send Account Creation Email With Password
- Convert Guests to Customers in Bulk or Individually
- Import Guests via CSV file & Convert to Customers

2.1 Auto Convert Guest To Customers

This extension allows you to automatically convert guests into customers. Based on the predefined configurations, the guest is automatically converted to customers upon successful checkout and an email is sent featuring customer username & password. Admin can also send a password set link to allow the customers to set their own password.

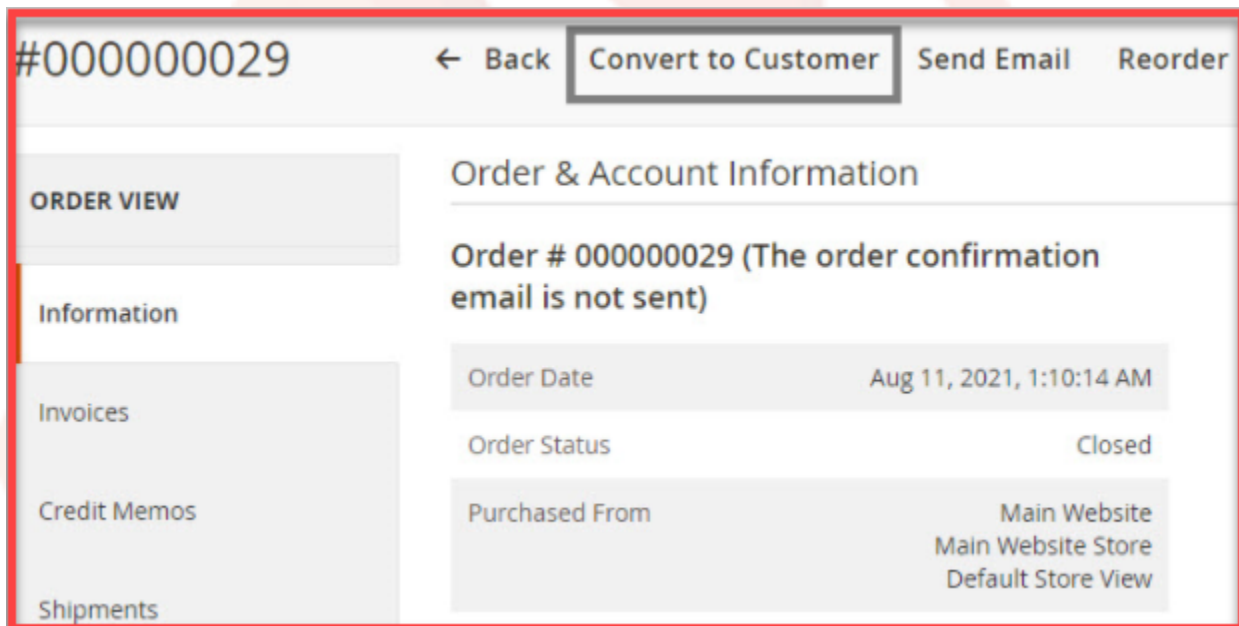## 2.2 Convert Guests to Customers Manually

Store owners can also manually convert guests into customers. All the guests are displayed in a separate guest management grid. In this grid, store owners can

convert guests to customers from the convert button as displayed in the action column and also convert guests to customers in bulk from the Mass actions dropdown.

2.3 Convert Guest to Customer from Order Detail Page

The Convert guest to customer button is displayed on the order detail page. By clicking this button the guest is automatically converted to a customer.

2.4 Assign Customer Group to Converted Customers

With this option, you can add the new customer to any of the available customer groups like general, retailer, wholesaler, etc.

2.5 Send Account Creation Email With Password

This extension offers two options to set the password for new customers.

- **Email with Set Password Link:** With this option, **email is sent with a password link**. Customers can **click the link** to set their desired password

- **Email with Username & Password:** With this option, **username & auto generated password is sent to the customers**. Customers can use the username & password on the login page to access their account

2.6 Convert Guests to Customers in Bulk or Individually

This extension gives you the option to convert guests to customers in bulk. Front the guest management grid, admin can convert all the guests to customers from the MassActions dropdown. Moreover, admin can convert each guest to customer individually just by clicking the Convert button shown in each guest row in the grid.

2.7 Import Guests via CSV file & Convert to Customers

Another important feature of this extension is that admin can **import & convert all the guests via a CSV file**. Make sure that the **guests in the CSV file match** the **guests in the guest management grid**. Only the **matching guests** will be c**onverted into customers**. Check a downloadable **sample CSV** file before importing guests.

3. Setup the Extension

At the backend, go to **FME EXTENSIONS > Configurations**. Here you can find the extension configurations.

3.1 General Configurations

Now, expand the **General Configurations Tab** & set the following configurations:
- **Enable Guest To Customer Conversion:** Enable/Disable the extension
- **Auto convert guest to customer:** Select **Yes** to automatically convert guest to customers else select **No** to manually convert guests to customers.
- **Customer Group:** Select a customer **group** to **assign new customers**
- **Import Guests:** Enable/Disable to **import guests via CSV file**

- **Send Mail:** Choose any of the following options according to your requirements:
  - **Email with Set Password Link:** With this option, **email is sent with a password link**. Customers can **click the link** to set their desired password
  - **Email with Username & Password:** With this option, **username & auto generated password is sent to the customers**. Customers can use the username & password on the login page to access their account
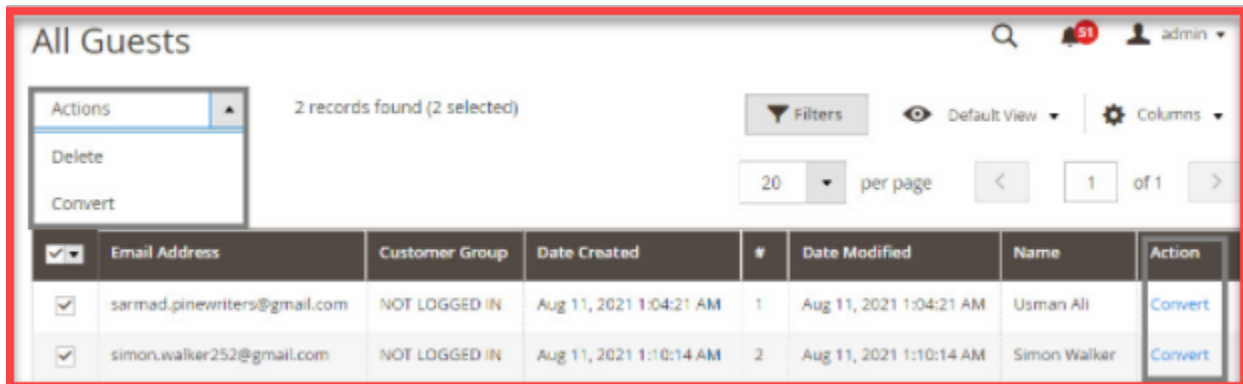

3.2 Guest Management

At the backend, go to **FME EXTENSIONS > Guest Management**. Here you can find all the guests. Store owners can convert guests to customers in bulk or individually convert guests to customers.
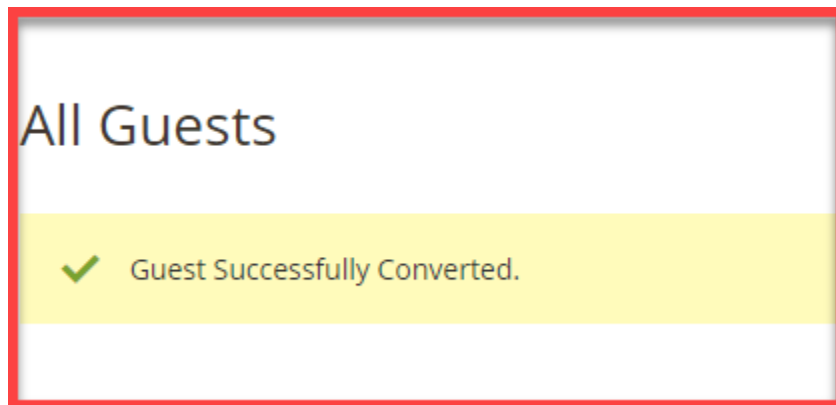
- From the grid, you can **convert the guest to customer** just by **clicking the Convert button**

● Store owners can **convert all the guests to customers** in **bulk** just by clicking the **Convert option** in the **Mass actions**

Clicking the 'Convert' button converts the select guest buyers into customers and the following success message appears.

3.3 Import Guests Via CSV File & Convert to Customers

At the backend, go to **FME EXTENSIONS > Import Guests**.

Before importing guests, check the **downloadable sample CSV file**. A success message will appear **upon CSV import** along with the **number of converted guests to customers**. Make sure that the **guest emails match** the **email in the guest management grid**. Only **matching guests** will be converted to customers.

4. Disclaimer

It is highly recommended to back up your server files and database before installing this module. No responsibility will be taken for any adverse effects occurring during installation.

It is recommended you install on a test server initially to carry out your own testing.