

Login As Customer

Login As Customer for Magento 2

User Guide

Version 1.0



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I) Introduction

Login As Customer for Magento 2 gives admins the ability to log in to customer accounts from the backend in one click without the necessity to request username and password from customers. Therefore, the admins can resolve any issue related to customer accounts or purchasing process quickly and efficiently.

- Log in to customer accounts in one click
- Track and record all login actions
- Limit login permission to specific sub-admin users



II) Where to Find Extension

After installing the extension, navigate to **Stores > Settings > Configuration**:

Ŵ	Stores	×				
\$ SALES	Settings					
	Configuration 2					上 demo 👻
stores						Save Config
SYSTEM			General			\odot
				Enable [global]	Yes Select Yes/No to enable/disable this module	

In the left panel, span **Magezon Extensions** and click **Login As Customer**. In the **General** section on the right-hand side, you can choose Yes/No from **Enable** drop-down to enable/disable the extension:

SALES CUSTOMERS	Configuration	上 demo 🗸
	Scope: Default Config 👻 🕜	Save Config
SYSTEM	General Login As Customer General Enable global Yes Select Yes/No to enable/disable this module	\odot



III) Log In From Customer Grid Page

- Go to **Customers > All Customers** and you'll see a grid containing all customers of

your website:

	Customers			
\$ SALES	All Customers 2			
	Login As Customer			💄 demo 👻
STORES	Logs			Save Config
SYSTEM		^ General		\odot
			Enable Yes [global] Select Yes/No to enable/disable this module	

- In **Action** column, click **Select** drop-down list and click **Login As Customer** to log in to the account of your chosen customer:

Cus	tome	ſS													1
													Ad	ld New (Cus
Searc	h by keywo	rd		С	2				T Fi	lters 💿	Default Vie	2w 🔻	🔅 Colun	nns 🗸	±
Actio	ns	 ✓ 2 records 	found							20	▼ pe	er page	<	1	¢
Actio	Name	2 records	found Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	20 Confirmed email	▼ pe Account Created in	Date of Birth	Tax VAT Number	1 Gender	
ID ↓	Name Veronica Costello	Email roni_cost@example.com	found Group General	Phone (555) 229-	ZIP 49628- 7978	Country United States	State/Province Michigan	Customer Since May 27, 2020	Web Site Main Website	20 Confirmed email Confirmation Not Required	▼ pe Account Created in Default Store	Date of Birth Dec 15,	Tax VAT Number	1 Gender Female	
Actio	Name Veronica Costello	Z records	found Group General	Phone (555) 229- 3326	ZIP 49628- 7978	Country United States	State/Province Michigan	Customer Since May 27, 2020 6:23:47 PM	Web Site Main Website	20 Confirmed email Confirmation Not Required	Account Created in Default Store View	Date of Birth Dec 15, 1973	Tax VAT Number	1 Gender Female Edit	t tin A



IV) Log In From Customer View Page

- When you open a customer view page, click **Login As Customer** on the top bar to log in to the customer account:





V) Log In From Order Grid Page

- Go to **Sales > Operations > Orders** and you'll see a grid containing all orders:

Ŵ	Sale	5	×								Ci	reate New Order
\$ SALES	Operations			Q				▼ Filters ● Default View ▼ ✿ Columns ▼ ▲ Export ▼				
	Orders 2			ds found					20 🔻	per page	<	1 of 1 >
STORES	Invoice	s	ıt	Purchase Date	t	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Signifyd Guarantee Decision
S YSTEM	Credit N	/lemos		Jun 8, 2020		Veronica	Veronica	\$97.43	\$97.43	Closed	Select 🔻	Decision
	Billing A	greements	e	0.49.39 PW		Costeno	Costello					
	Transactions		Default	Jun 8, 2020 6:49:03 PM		Veronica Costello	Veronica Costello	\$97.43	\$97.43	Closed	Select 🔻	
		000000076	Store View Main Website Main Website Store	Jun 8, 2020 6:48:09 PM		Veronica Costello	Veronica Costello	\$97.43	\$97.43	Processing	Select 🔻	
			Store View									

- In **Action** column, click **Select** drop-down list and click **Login As Customer** to log in to the account of the customer with this order:

Ŵ	Ord	ers									💄 demo 👻	
\$ SALES												
										Create	New Order	
STORES	Searci	h by keyword		Q			T Fil	ters 📀 De	fault View 🔻	🔅 Columns 🗸	📩 Export 👻	
SYSTEM	Action	ns	▪ 15 reco	rds found				20	 per page 	< 1	of 1 >	
		ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Signifyd Guarantee ↓ Decision	Action	
		000000064	Main Website Main	Jun 5, 2020 11:39:10 PM	Veronica Costello	Veronica Costello	\$97.43	\$97.43	Closed	16	Select 🔺	
			Website Store Default Store View								egin As Customer	
		000000065	Main Website Main	Jun 8, 2020 6:20:04 PM	Veronica Costello	Veronica Costello	\$97.43	\$97.43	Pending		Select 🔻	



VI) Log In From Order View Page

- When you open an order view page, click **Login As Customer** on the top bar to log in to the customer account:

Û	#00000078					💄 demo 🗸
Sales			← Back	Send Email	Reorder	Login as Customer
	ORDER VIEW	Order & Account In	formation			
SYSTEM	Information	Order # 000000078 (email is not sent)	The order confirmation	Account	Information	Edit Customer
	Invoices	Order Date	Jun 8, 2020, 6:49:39 PM	Customer	r Name	Veronica Costello
		Order Status	Closed	Email		roni_cost@example.com
	Credit Memos	Purchased From	Main Website	Customer	r Group	General
	Shipments		Main Website Store Default Store View			
	Comments History					
		Address Informatio	n			



VII) Login Logs

Login As Customer extension allows recording any access to any customer account in a separate Login As Customer Logs section. Please navigate to Customers > Login As
 Customer > Logs...

Ŵ	Customers	× . Logs				👤 demo 🗸
\$ SALES	All Customers			Filt	ers Oefault View 🗸	🔅 Columns 🗸 📩 Export 🗸
	Login As Customer	records four	nd		20 💌 per pa	ge < 1 of 2 >
	Logs 2		Customer Email	Admin ID	Admin Name	Logged In
STORES			roni_cost@example.com	6	demo	2020-06-17 02:17:59
SYSTEM			roni_cost@example.com	6	demo	2020-06-17 03:18:07
			trangvt@magezon.com	4	m2magezon	2020-06-17 03:23:48
			roni_cost@example.com	4	m2magezon	2020-06-17 03:29:12
			roni_cost@example.com	4	m2magezon	2020-06-17 03:33:27
			roni_cost@example.com	6	demo	2020-06-17 07:34:40
			roni_cost@example.com	6	demo	2020-06-17 07:34:58
			roni_cost@example.com	2	demo	2020-06-18 05:07:55
			roni_cost@example.com	2	demo	2020-06-18 05:11:38

...where you can find a grid containing all login actions recorded:

	Login as Customer Logs											
⊅ SALES	Filters Default View Columns Export											
CUSTOMERS	Action	Actions • 34 records found 20 • per page <										
		ID ↓	Customer ID	Customer Email	Admin ID	Admin Name	Logged In					
STORES		24	1	roni_cost@example.com	6	demo	2020-06-17 02:17:59					
SYSTEM		25	1	roni_cost@example.com	6	demo	2020-06-17 03:18:07					
		26	4	trangvt@magezon.com	4	m2magezon	2020-06-17 03:23:48					
		27	1	roni_cost@example.com	4	m2magezon	2020-06-17 03:29:12					
		28	1	roni_cost@example.com	4	m2magezon	2020-06-17 03:33:27					
		29	1	roni_cost@example.com	6	demo	2020-06-17 07:34:40					
		30	1	roni_cost@example.com	6	demo	2020-06-17 07:34:58					



From the grid, you can see log **Id**, **Customer Id**, **Customer Email**, **Admin Id**, **Admin Name** as well as the date and time when the admin logged in to the customer account.

- Click **Export** button above the grid to export the log data to CSV or XML files for further use:

SALES CUSTOMERS	Log	in as C	v 37 records fou	S	V Filters	 Default View • 20 • per page 	L demo ✓ Columns Columns CSV Fyrel XMI
STORES	V	ID ↓	Customer ID	Customer Email	Admin ID	Admin Name	Logge
SYSTEM		24	1	roni_cost@example.com	6	demo	2020- Cancel Export
		25	1	roni_cost@example.com	6	demo	2020-06-17 03:18:07
		26	4	trangvt@magezon.com	4	m2magezon	2020-06-17 03:23:48
		27	1	roni_cost@example.com	4	m2magezon	2020-06-17 03:29:12
		28	1	roni_cost@example.com	4	m2magezon	2020-06-17 03:33:27
		29	1	roni_cost@example.com	6	demo	2020-06-17 07:34:40

- Remove any log data from the grid by ticking the checkbox(es), then clicking the **Delete** option in **Actions** drop-down list:

SALES	Login as Customer Logs										
CUSTOMERS		Action Delete	s	▲ 37 records foun	d (3 selected)		20 v per page	< 1 of 2 >			
**			т р +	Customer ID		Admin ID		Logged In			
SYSTEM	[24	1	roni_cost@example.com	6	demo	2020-06-17 02:17:59			
	[25	1	roni_cost@example.com	6	demo	2020-06-17 03:18:07			
	[26	4	trangvt@magezon.com	4	m2magezon	2020-06-17 03:23:48			
		~	27	1	roni_cost@example.com	4	m2magezon	2020-06-17 03:29:12			
	[28	1	roni_cost@example.com	4	m2magezon	2020-06-17 03:33:27			
		~	29	1	roni_cost@example.com	6	demo	2020-06-17 07:34:40			
		~	30	1	roni_cost@example.com	6	demo	2020-06-17 07:34:58			



After you click the **Delete** option, a popup of action confirmation will appear. Click **OK** to finish:

SALES	Login as Customer L Actions • 37 records			Delete items Are you sure you want to delete selected items? (3 records) Cancel OK per page			▲ demo ▼ ★ Columns ▼ ▲ Export ▼ < 1 of 2 >
STORES		ID ↓	Customer ID	Customer Email	Admin ID	Admin Name	Logged In
SYSTEM		24	1	roni_cost@example.com	6	demo	2020-06-17 02:17:59
		25	1	roni_cost@example.com	6	demo	2020-06-17 03:18:07
		26	4	trangvt@magezon.com	4	m2magezon	2020-06-17 03:23:48
	~	27	1	roni_cost@example.com	4	m2magezon	2020-06-17 03:29:12
		28	1	roni_cost@example.com	4	m2magezon	2020-06-17 03:33:27
	~	29	1	roni_cost@example.com	6	demo	2020-06-17 07:34:40
	~	30	1	roni_cost@example.com	6	demo	2020-06-17 07:34:58
		31	1	roni_cost@example.com	2	demo	2020-06-18 05:07:55

- Click the **Filter** button above the grid to filter the logs based on log Id, Logged In time, Customer Id, Customer Email, Admin Id and Admin Name:

SALES	Login as Customer L	ogs	✓ Filters ODefault View ▼ Columns ▼ LExport ▼			
CONTENTION	ID	Logged In	Customer ID	Cu	stomer Email	
	from	from				
SYSTEM	to	to to				
	Admin ID	Admin Name			Cancel Apply Filters	
	Actions	found (2 selected)		20 • per page	< 1 of 2 >	
	ID ↓ Customer ID	Customer Email	Admin ID	Admin Name	Logged In	



VIII) Support

If you have any questions or need any support, feel free to contact us by following ways. We will get back to you within 24 hours since you submit your support request.

- Submit contact form.
- Email us at support@magezon.com.
- Submit a ticket.
- Contact us through Skype: support@magezon.com.
- Contact us via live chat on our website: magezon.com.