

MAGENTO 2 CE CUSTOMER INVITATIONS

USER GUIDE

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Change settings

The screenshot shows the configuration interface for customer invitations. The 'GENERAL & EMAIL CONFIGURATION' section is highlighted with a red box. The 'Invitations' section contains the following settings:

- Enable Invitations Functionality [website]: Yes
- Enable Invitations on Storefront [website]: Yes
- Referred Customer Group [website]: Default Customer Group From Configuration
- New Account Registration [website]: Available to All
- Allow Customers to Add Custom Message to Invitation Email [website]: Yes
- Max Invitations Allowed to be Sent at One Time [website]: 5

The 'Email' section contains the following settings:

- Customer Invitation Email Sender [website]: General Contact
- Customer Invitation Email Template [store view]: Customer Invitation (Default) Use system value

Below the 'Email' section, a note states: "Email template chosen based on theme fallback when".

- Enable invitations on storefront: Allow customers to send invitations
- Referred customer group: There are two options
 - If you choose “default customer group”, invitees will be assigned to default group.
 - If you choose “Same as Inviter”, invitees will be assigned to inviter’s group.
- New Account Registration:
 - If you choose “Available to All”, all guests can create a new account.
 - If you choose “By invitation only”, only person invited can create a new account. If a guest visits registration page, the guest will be redirected to index page with a message.
- Allow customers to add custom message to invitation email
 - If you choose “yes”, customers can send invitations to their friends with a custom message.
 - If you choose “No”, customers can’t do that.
- Max invitations allowed to be sent at one time: The limited number of emails can send at the same time.
- Customer invitation email sender: Choose an sender contact
- Customer invitation email template: Choose an email template for sending invitations.

Create a new email template

This extension supports an available email template. To create a new one, you can follow these steps:

1. Click on Marketing -> Communications -> Email Templates
2. Click on “Add new template”
3. Select an available template, you should select “customer invitation” template

CUSTOMER INVITATIONS

← Back Reset Convert to Plain Text Preview Template Save Template

Load default template

Template: Customer Invitation

- New Shipment for Guest (Magento/luma)
- Order Update
- Order Update (Magento/luma)
- Order Update for Guest
- Order Update for Guest (Magento/luma)
- Shipment Update
- Shipment Update (Magento/luma)
- Shipment Update for Guest
- Shipment Update for Guest (Magento/luma)
- Magento_SendFriend
- Send Product Link to Friend
- Magento_Sitemap
- Sitemap Generation Warnings
- Magento_User
- Forgot Admin Password
- User Notification
- Magento_Wishlist
- Wish List Sharing
- Yosto_CustomerInvitation
- Customer Invitation

Template Information

Template Name *

Template Subject *

Template Content *

4. Edit and save modified template

New Template ← Back Reset Convert to Plain Text Preview Template Save Template

Template Name *

Template Subject * {{{if inviter_name}}}{(trans "%inviter_name invites you to join Private Sales Site" inviter_n

Insert Variable...

Template Content * {{{template config_path="design/email/header_template"}}}

```
<p class="greeting">{{(trans "Please accept this invitation to join %store_name." store_name=$store.getFrontendName())}}</p>
<p>{{(trans "%store_name offers limited time sales of products only to members." store_name=$store.getFrontendName())}}</p>
{{{depend message}}
<table class="message-info" cellspacing="0" cellpadding="0" border="0">
<tr>
<td>
{{(var message |escape |nl2br)}}
</td>
</tr>
</table>
<br />
{{{/depend}}}
```

Send invitation from backend

INVITATION FORM FOR ADMIN Reset Save and Continue Edit Save

Invitation Information ✎

Enter Each Email on New Line *

Message *

Send From * ?

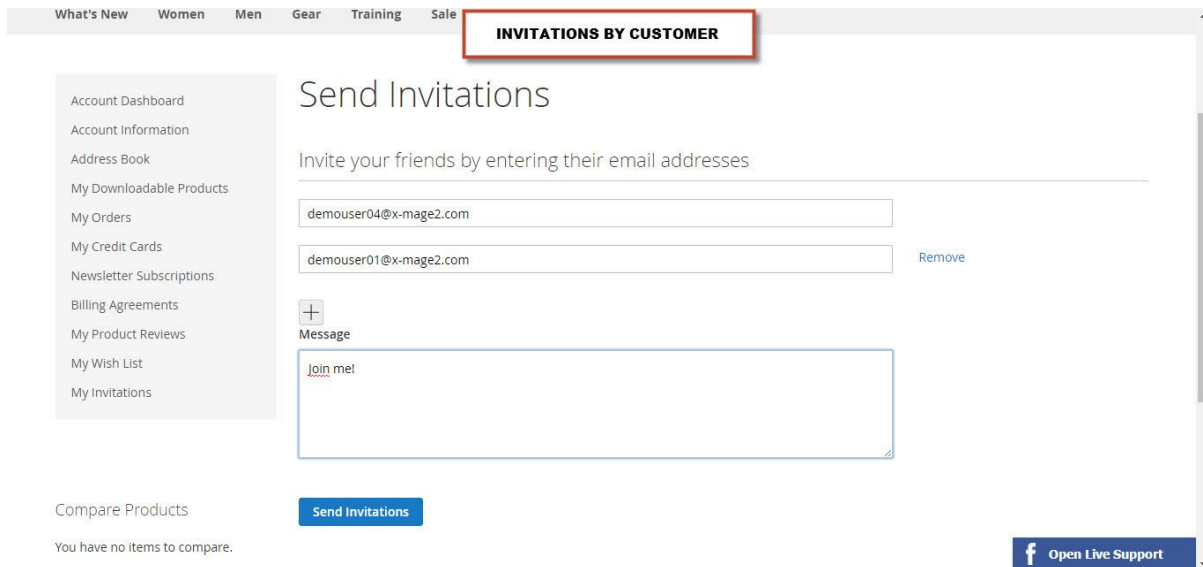
Invitee Group *

- NOT LOGGED IN
- NOT LOGGED IN
- General
- Wholesale
- Retailer

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- Send from: The name of store view will be inserted in sent email.
- Invitee group: Admin can choose a customer group for invitee.

Send invitation from storefront



The screenshot shows the 'Send Invitations' page in a storefront. At the top, there is a navigation bar with links for 'What's New', 'Women', 'Men', 'Gear', 'Training', and 'Sale'. A red box highlights the 'INVITATIONS BY CUSTOMER' tab. On the left, a sidebar menu lists various account options, with 'My Invitations' selected. The main content area is titled 'Send Invitations' and includes the instruction 'Invite your friends by entering their email addresses'. Below this, there are two input fields containing the email addresses 'demouser04@x-mage2.com' and 'demouser01@x-mage2.com'. A 'Remove' link is positioned to the right of the second email field. A plus sign icon is located below the email fields. Underneath, there is a 'Message' section with a text area containing the text 'Join me!'. At the bottom of the main content area, there is a blue 'Send Invitations' button. In the bottom right corner, there is a blue button with a Facebook icon and the text 'Open Live Support'. At the bottom left, there is a 'Compare Products' section with the text 'You have no items to compare.'

- Customers can send multiple invitations, however, the number of emails can't over configured limited number.