

# Guest To Customer Extension For Magento 2

Guest to Customer Extension for Magento 2 by TheOnlineHelper adds the button in order view page in admin to convert guest to customer. On click it allows you to change the guest customer into customer by automatically creating the customer based on guest customer's order information. You can easily change guests to customers by using our extension.

## Installation

### How to Install?

- Download the .zip file of Guest To Customer Extension.
- Extract the downloaded file.
- Paste the file in your app/code directory.
- Run the following commands to install the module.

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

```
php bin/magento setup:di:compile
```

```
php bin/magento setup:static-content:deploy
```

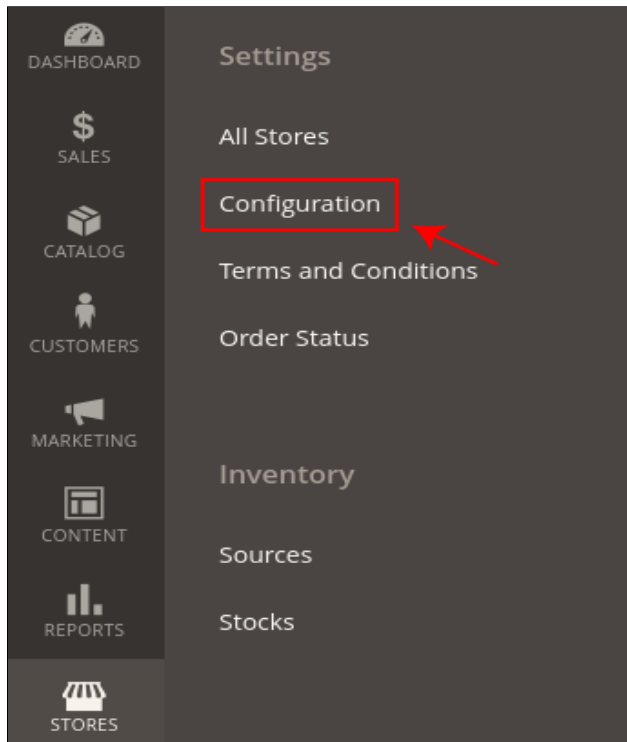
- Now run the command to clean cache.

```
php bin/magento cache:clean
```

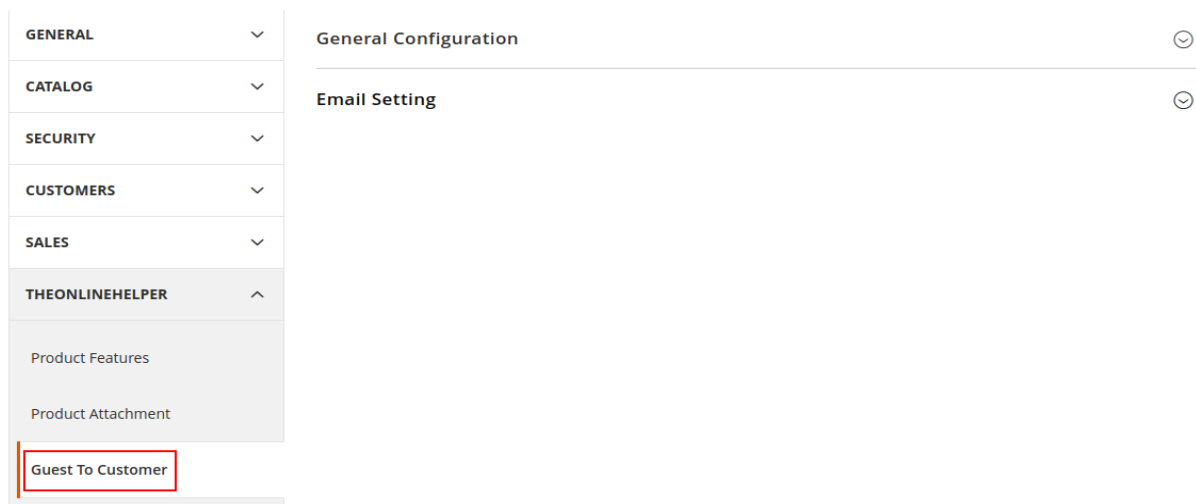
# Configuration

## How to Configure?

- In the Admin panel, go to **STORES > Configuration**.



- Click on **TheOnlineHelper > Guest To Customer**.



- In the **General Configuration**, click on the **Enable** dropdown and select Yes to enable the module.

## General Configuration

**Enable** [store view] Yes 

- In the section of **Email Settings**, click on the **Enable** dropdown and select Yes to enable the email.
- Click on the **Automatically send Email** dropdown, select Yes to send the email automatically when the order is placed as a guest customer.
- Click on the **Email Template**, select the template for email.
- Click on the Save Config button to save your settings.

## Email Setting

**Enabled** [store view] Yes 

Your Comments

**Automatically Send Email** [store view] Yes 

**Email sender** [store view] General Contact 

Use system value

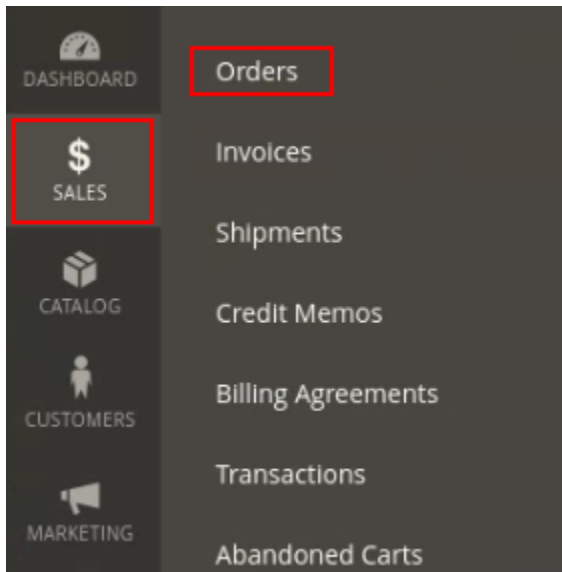
**Email Template** [store view] Guest To Customer Email Template (Default) 

Use system value

Email template chosen based on theme fallback when "Default" option is selected.

## To Convert Customer Manually

- In the admin panel, click on the **SALES > Orders**.



- In the order grid, **Convert Action** will tell the order status that is ordered by the guest or not.
- If the order is ordered by guest then it will show **Convert Guest To Customer** and if order is ordered by your customer then it will show Login As Customer.
- Click on the **Convert Guest to Customer** link to change guests into customers.

	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Allocated sources	Braintree Transaction Source	Convert Action
<input type="checkbox"/>	000000128	Main Website Main Website Store Default Store View	Mar 12, 2022 4:29:25 AM	Max Root	Max Root	\$27.00	\$27.00	Pending	<a href="#">View</a>			<a href="#">Convert Guest To Customer</a>
<input type="checkbox"/>	000000127	Main Website Main Website Store Default Store View	Mar 12, 2022 4:25:29 AM	Max Root	Max Root	\$27.00	\$27.00	Pending	<a href="#">View</a>			<a href="#">Convert Guest To Customer</a>

- Now the order view page is opened, click on the **Guest To Customer** button.

← Back   Cancel   Send Email   Hold   Invoice   Ship   Reorder   **Guest To Customer**   Delete   Edit

**ORDER VIEW**

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History

### Order & Account Information

Order # 00000128 (The order confirmation email was sent)

Order Date	Mar 12, 2022, 4:29:25 AM
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	127.0.0.1

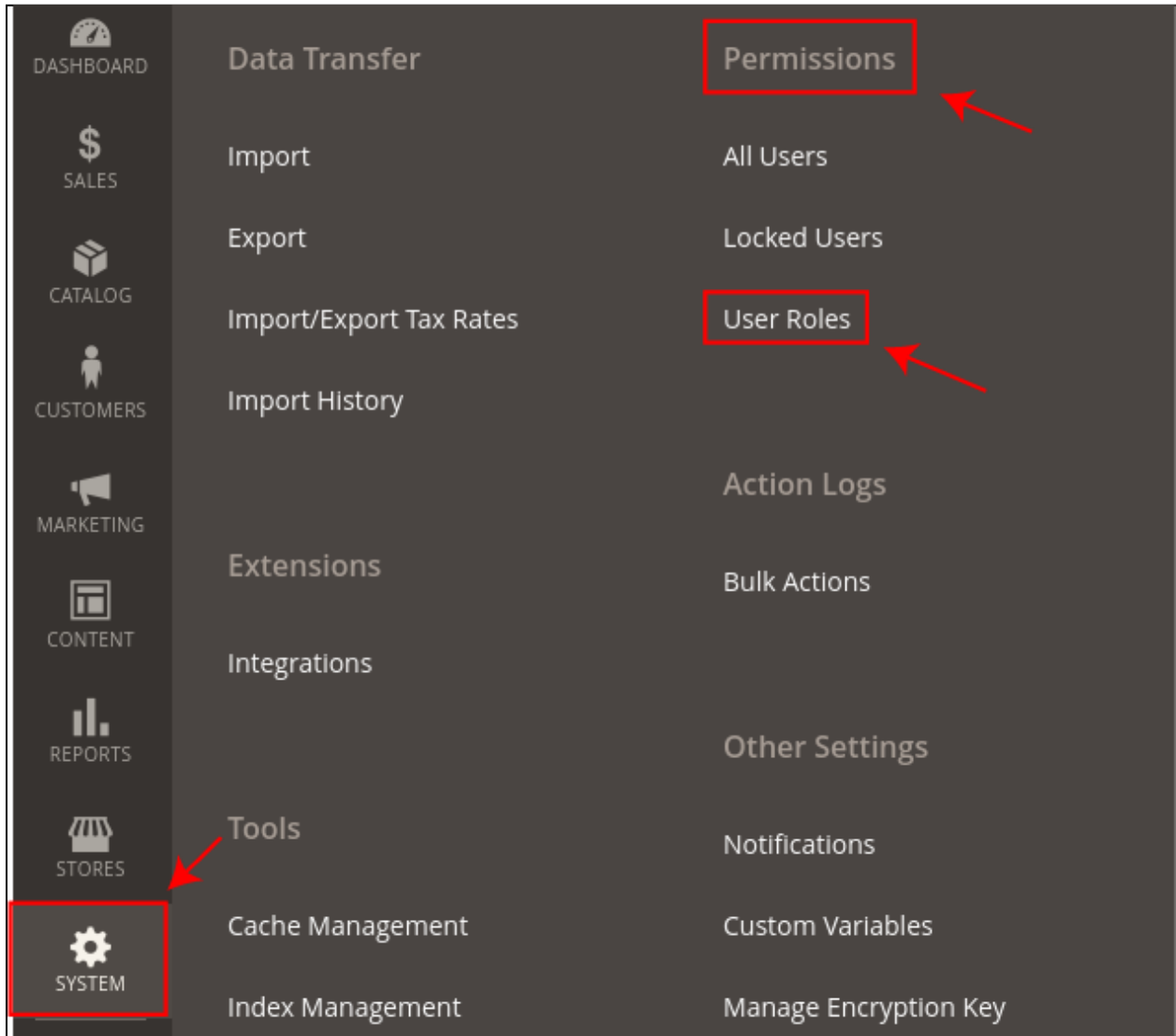
### Account Information

Customer Name	Max Root
Email	<a href="mailto:customer@example.com">customer@example.com</a>
Customer Group	NOT LOGGED IN

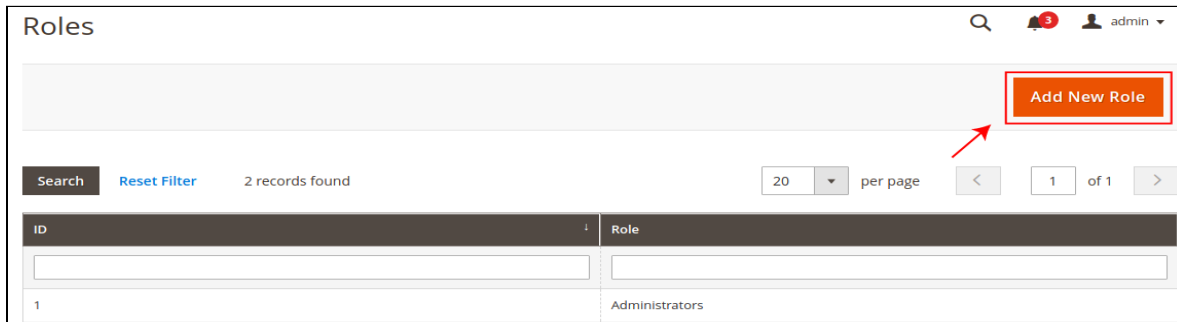
- Click **Ok** on the confirmation notification, this process will send email to the guest customer along with the login details.
- Now your guest customer can login as a customer into your by use of login details that are mentioned in email.

## To set permissions

- Go to **SYSTEM > Permissions > User Roles**.



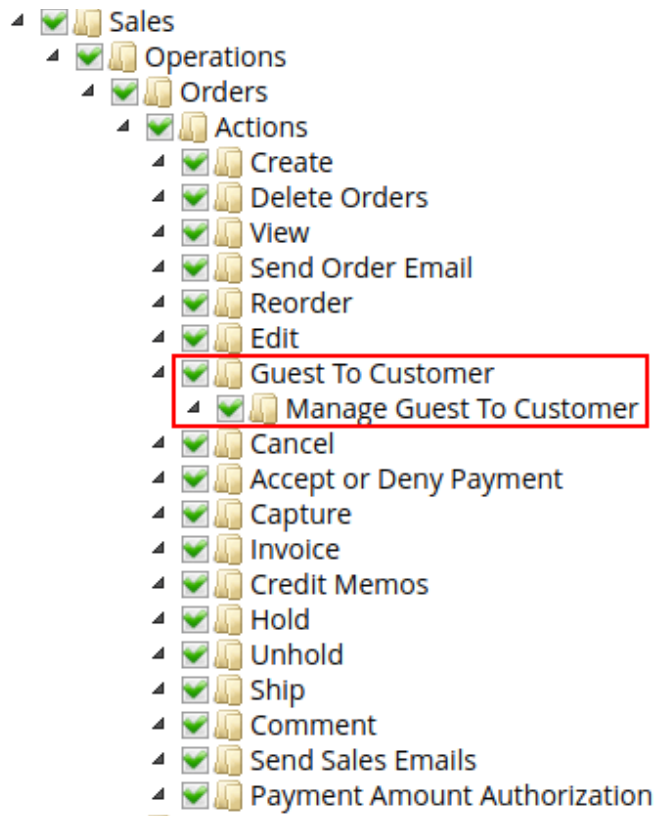
- Click on the **Add New Role** button.



- Under **Role Information**, in the field of **Role Name** enter the name of the role.
- In the field of **Your Password**, enter your current password for verification.

The screenshot shows a form for adding a new role. On the left side, there is a sidebar with two tabs: 'Role Info' and 'Role Resources'. The 'Role Info' tab is selected and highlighted with a red rectangular box and a red arrow pointing to it. The main content area is divided into two sections. The first section is titled 'Role Information' and contains a single text input field labeled 'Role Name \*'. The second section is titled 'Current User Identity Verification' and contains a single text input field labeled 'Your Password \*'.

- Under the **Role Resources**, select the role scope All/Custom.
- If you don't want to give complete admin access to other users then choose Custom scope.
- Tick on the permissions of Sales, to give access to Order.
- Tick on the permissions of Guest To Customer, if you only want to give access to changes guest into customer functionality to the other users.



- After completing your changes click on the **Save Role** button.
- In the admin grid, all roles are listed here.

[Add New Role](#)

Search [Reset Filter](#) 2 records found 20 per page 1 of 1

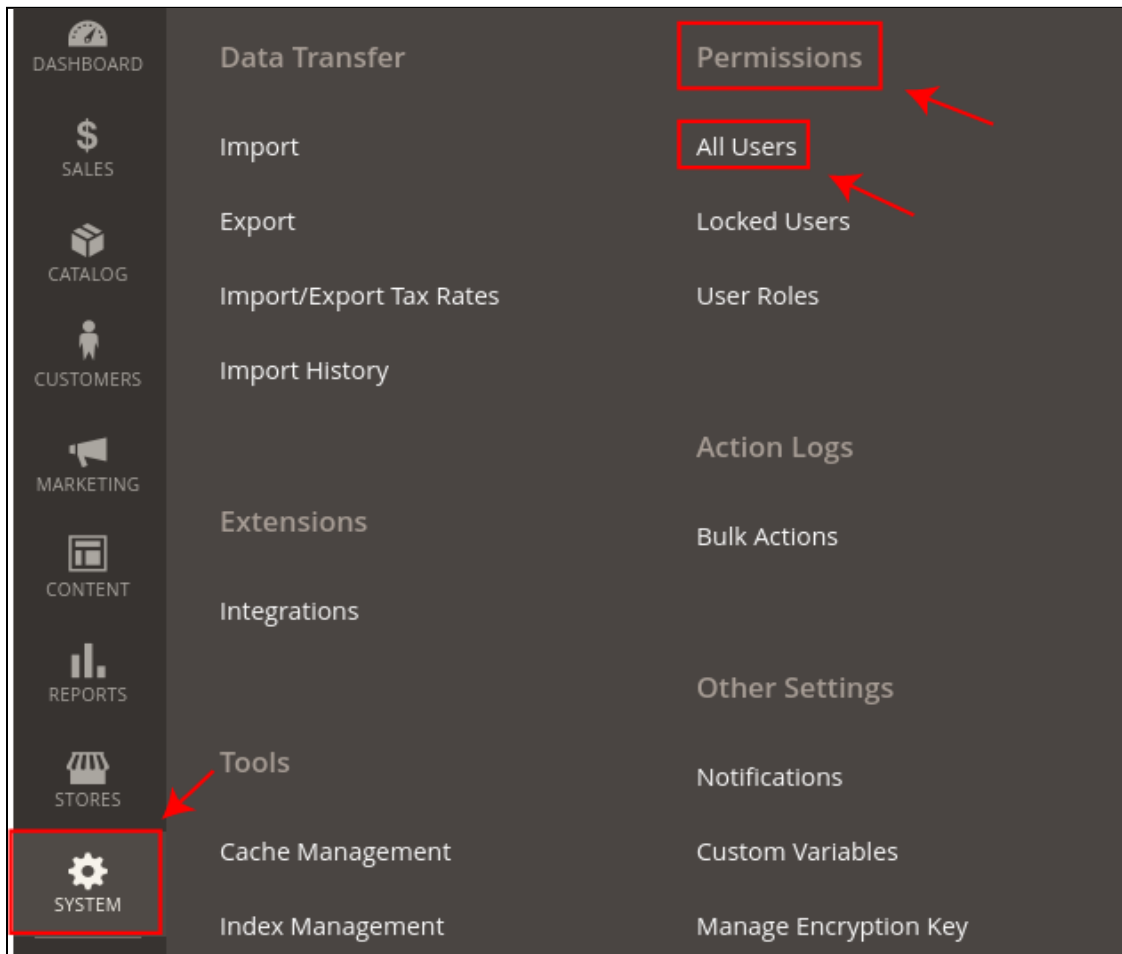
ID	Role
1	Administrators
49	<span style="border: 1px solid red; padding: 2px;">Guest to Customer</span>

- If you want to edit any role click on it and edit changes.

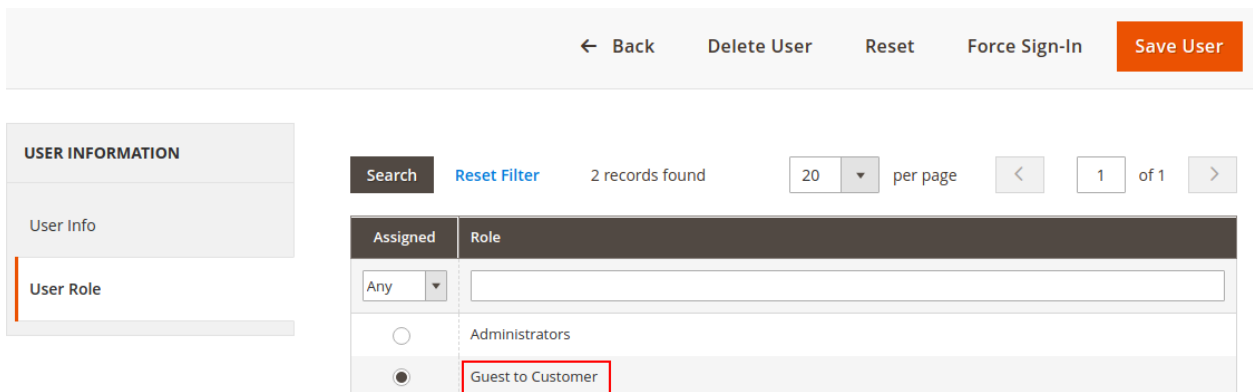


To assign your created User Role to the users

- Go to **SYSTEM > Permissions > All Users**.



- Click on the specific user to assign the user role.
- In the tab of **User Role**, click on the role that you want to assign.



- Click on the **Save User** button to apply changes.