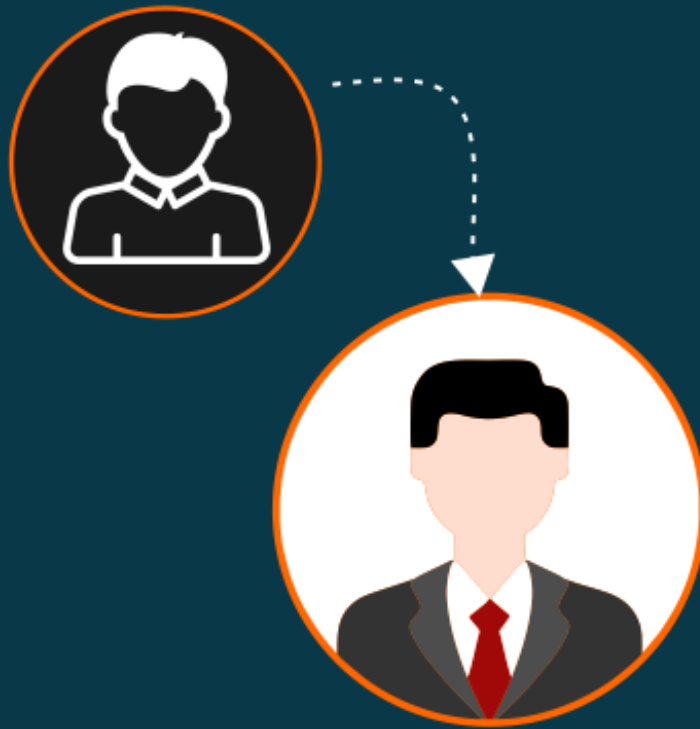


Guest to Customer

For Magento 2



[Guest to Customer – Magento 2](#)

[USER MANUAL](#)

Supported Version: 2.0, 2.1, 2.2, 2.3, 2.4

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Preface:

- Magento 2 Guest to Customer allows automatically converting guest users to real customers after they finish the checkout process. This module gives more options for admin to choose by showing a Guest management grid table in case they don't want to auto convert guests to customers. Previous orders are placed by same email of guest users before are also assigned to converted customers. Assigning guest users to customer group is also very easy because admin make mass actions in Guest Management Grid.

Installation:

There are two ways of installing extension in magento2.

- 1) Using COMMAND LINE.
- 2) Manually install extension.

Option 1: Magento 2 install extension using COMMAND LINE (Recommended).

Follow below steps to install extension from the command line.

Step 1: Download the extension and unzip it.

Step 2: Upload it to code directory in your magento installation's app directory.
If code directory does not exists then create.

Step 3: Disable the cache under System → Cache Management.

Step 4: Enter the following at the command line:
php bin/magento setup:upgrade
php bin/magento setup:static-content:deploy

Step 5: Once you complete above steps log out and log in back to the admin panel and switch to Stores → Configuration → Mageants → Guest to Customer.
The module will be displayed in the admin panel.

Option 2: Magento 2 install extension manually.

Step 1: Download the extension and unzip it.

Step 2: Upload it to code directory in your magento installation's app directory.
If code directory does not exists then create.

Step 3: Disable the cache under System → Cache Management Edit
app/etc/config.php file and add one line code:
'Mageants_GuestToCustomer' → 1

Step 4: Disable the cache under System → Cache Management

Step 5: Once you complete above steps log out and log in back to the
admin panel and switch to Stores → Configuration → Mageants →
Guest to Customer, the module will be displayed in the admin panel.

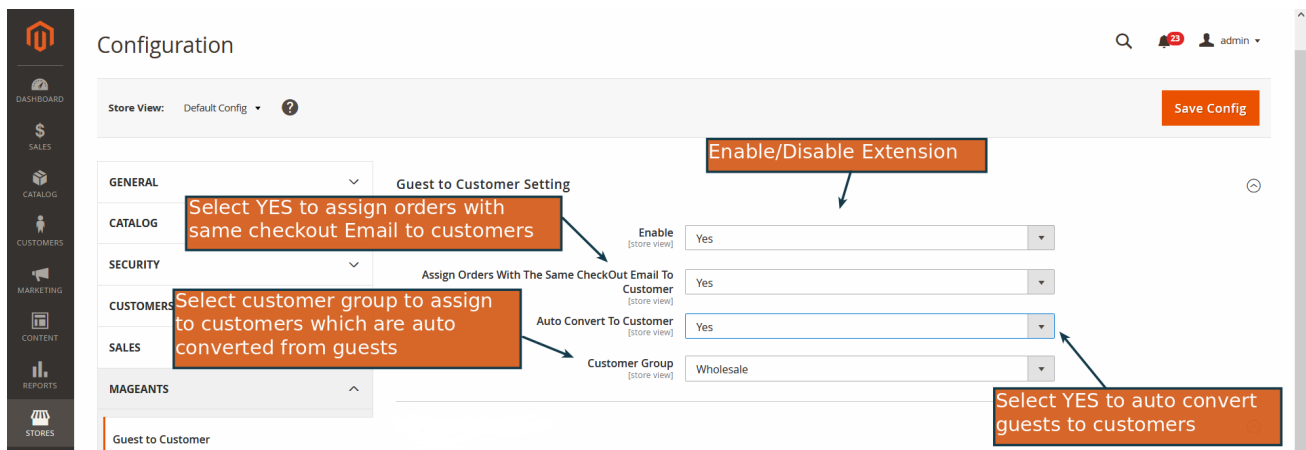
Backend example

After Installation of Extension login to magento admin panel to set configuration of the extension.

Extension Configuration

As per below screen shot you can set all the settings here.

You can find configuration at **Stores -> Configuration -> Mageants -> Guest to Customer**.



Configuration

Store View: Default Config ? Save Config

GENERAL Guest to Customer Setting

CATALOG Select YES to assign orders with same checkout Email to customers

SECURITY Assign Orders With The Same CheckOut Email To Customer

CUSTOMERS Select customer group to assign to customers which are auto converted from guests

SALES Auto Convert To Customer

MAGEANTS Customer Group

Guest to Customer

Enable/Disable Extension

Enable (store view) Yes

Assign Orders With The Same CheckOut Email To Customer (store view) Yes

Auto Convert To Customer (store view) Yes

Customer Group (store view) Wholesale

Select YES to auto convert guests to customers

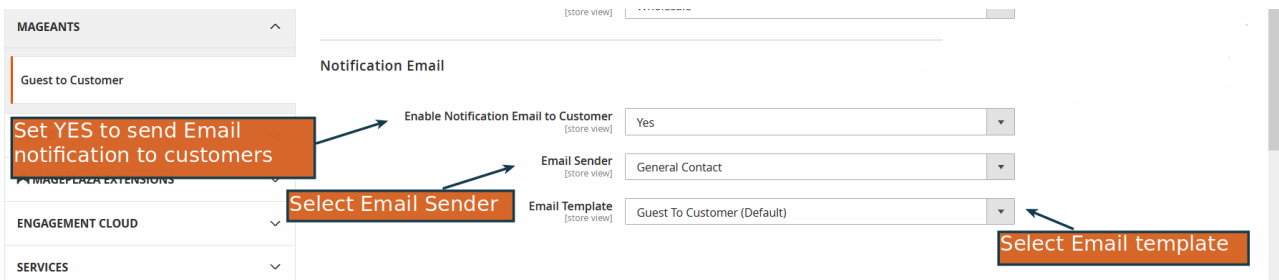
Enable Guest to Customer : Here you can enable and disable module from back end.

Assign Orders With The Same CheckOut Email To Customer : Select Yes to auto assign the orders with same checkout Email to Customers.

Auto Convert Guest to Customers : Select yes to auto convert guests to customers.

Customer Group: Select customer group to assign to the customers who are auto-converted from the guests.

Extension facilitates to send th Email notification to customers who are converted from guests.



MAGEANTS

Guest to Customer

Notification Email

Enable Notification Email to Customer [store view] Yes

Email Sender [store view] General Contact

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

Set YES to send Email notification to customers

Select Email Sender

Select Email template

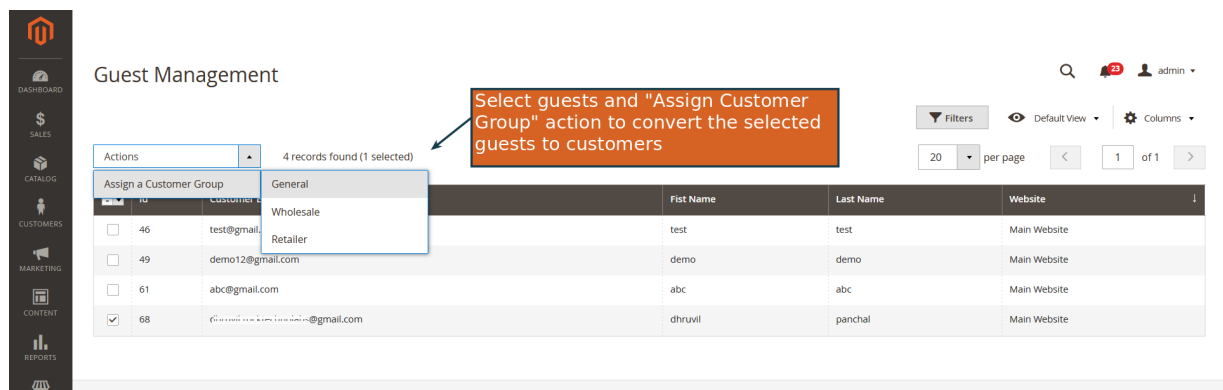
Send Email Notification to Customers : Select Yes to send the Email notification to customers converted from guests.

Email Sender : Select the Email sender.

Email Template : Select the Email template.

Manage Guests :

From the Admin Panel, go to Customers -> Guests -> Guests Management



Guest Management

4 records found (1 selected)

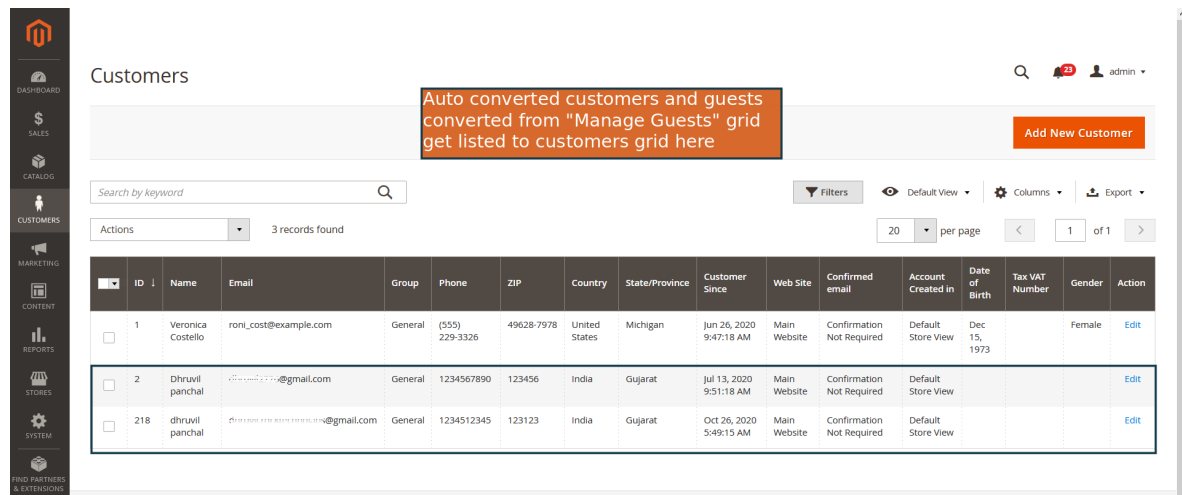
Select guests and "Assign Customer Group" action to convert the selected guests to customers

ID	Customer Email	First Name	Last Name	Website
46	test@gmail.com	test	test	Main Website
49	demo12@gmail.com	demo	demo	Main Website
61	abc@gmail.com	abc	abc	Main Website
68	dhruvil.panchal@gmail.com	dhruvil	panchal	Main Website

if “**Auto Converted Guest to Customers**” setting is enabled “**No**” from configuration, extension lists all guests to grid under **Customers > Manage Guests**. Admin can select multiple guests and them to customers using “**Assign a Customer Group**” mass action.

Guest to Customer :

From the Admin Panel, go to Customers -> All Customers



Customers

Auto converted customers and guests converted from "Manage Guests" grid get listed to customers grid here

Add New Customer

Search by keyword

Filters Default View Columns Export

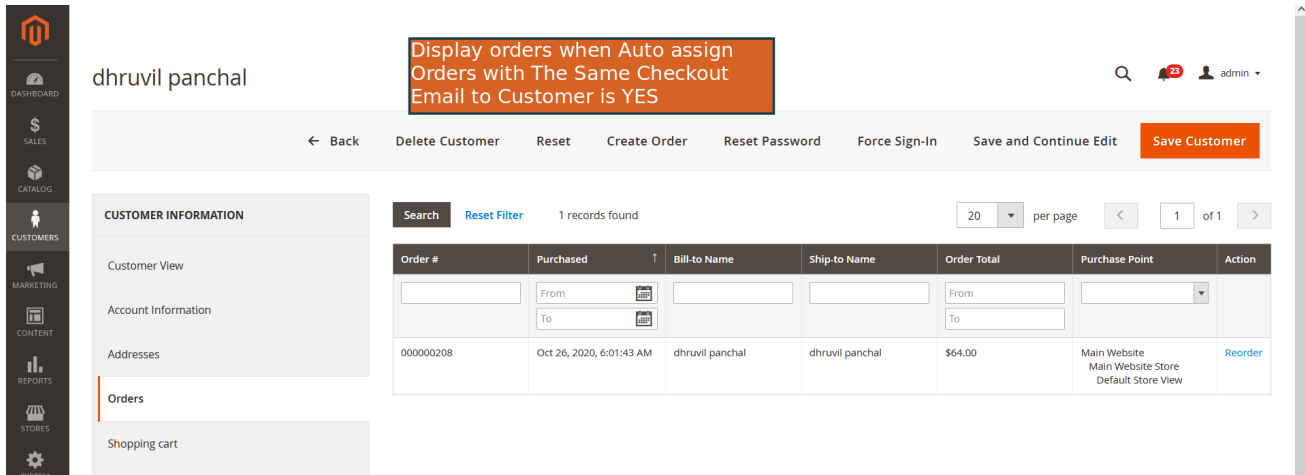
Actions 3 records found 20 per page 1 of 1

ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax/VAT Number	Gender	Action
1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Jun 26, 2020 9:47:18 AM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female	Edit
2	Dhruvil panchal	dhruvil.panchal@gmail.com	General	1234567890	123456	India	Gujarat	Jul 13, 2020 9:51:18 AM	Main Website	Confirmation Not Required	Default Store View				Edit
218	dhruvil panchal	dhruvil.panchal@gmail.com	General	1234512345	123123	India	Gujarat	Oct 26, 2020 5:49:15 AM	Main Website	Confirmation Not Required	Default Store View				Edit

Whenever guests are converted to customers automatically using **“Auto Convert Guests to Customers”** setting or admin opt to convert guest to customers from the **“Manage Guests”** grid, all the converted customers immediately added to **Customers > All Customers** grid.

- **Orders With Same Checkout Email :**

From the Admin Panel, go to Customers > All Customers > Orders



dhruvil panchal

Display orders when Auto assign Orders with The Same Checkout Email to Customer is YES

← Back Delete Customer Reset Create Order Reset Password Force Sign-In Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

Customer View

Account Information

Addresses

Orders

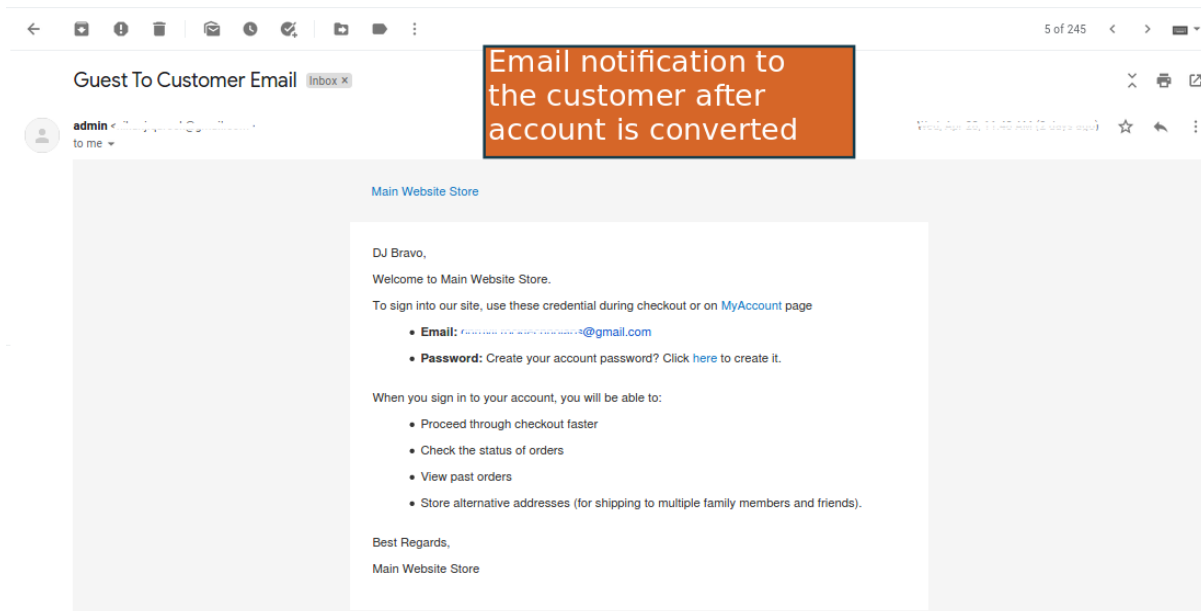
Shopping cart

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

Order #	Purchased	Bill-to Name	Ship-to Name	Order Total	Purchase Point	Action
000000208	Oct 26, 2020, 6:01:43 AM	dhruvil panchal	dhruvil panchal	\$64.00	Main Website Main Website Store Default Store View	Reorder

Orders are display when Configuration “**Yes**” of Auto Assign Orders with Same Checkout Email to Customers After Converted into Customers from Guests.

- **Email Notify to Customers:**



Immediately after guests is converted to customers using of the methods mentioned above, he gets an Email notification on Email ID. Email has details of Email ID and Password of customers to use to log in.



Thank you!

if you have any questions or feature suggestions, please contact us at:
<https://www.mageants.com/contact-us>

Your feedback is absolutely welcome!