

# LOGIN AS CUSTOMER

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## USER GUIDE

*Version 1.0.0*

Welcome to Login As Customer Extension for Magento 2 developed by Sparsh.

Login As Customer extension allows the store admin to log in to the customer account from the admin panel to provide better services by assisting at checkout or helping with any other shopping-related difficulties.

## KEY FEATURES:

- ❖ Enable/Disable from the backend
- ❖ Admin can log in to any customer account with just single click
- ❖ Admin can easily detect and fix issues the customer is facing
- ❖ Restrict permissions for other admin users to allow to log in as a customer
- ❖ Solve problems related to customers' account effortlessly
- ❖ Record every login activity
- ❖ Increase shopper Experience and quality of customer service

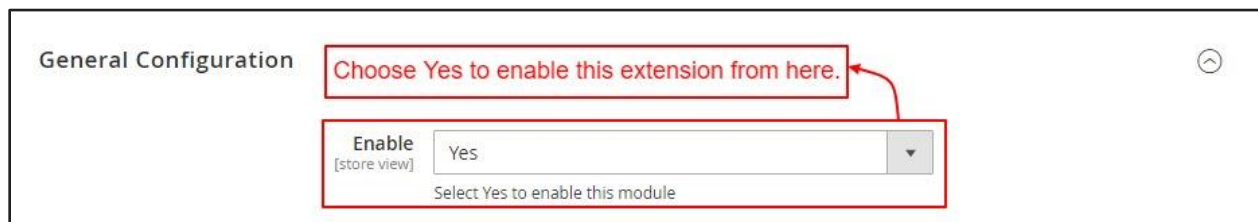
## 1. HOW TO ENABLE LOGIN AS CUSTOMER ACCOUNT EXTENSION

To use this extension, you first need to enable it from the backend.

Go to Magento 2 Admin > Login > Stores > Configuration > Sparsh Extensions > Login As Customer.

Expand the **General Configuration** section, and do the following:

- **Enabled:** Select “Yes” to enable this extension.



## 2. HOW TO LOGIN TO CUSTOMER ACCOUNT

Once enabled, you can log in to the customer account from either edit customer page or view order page.

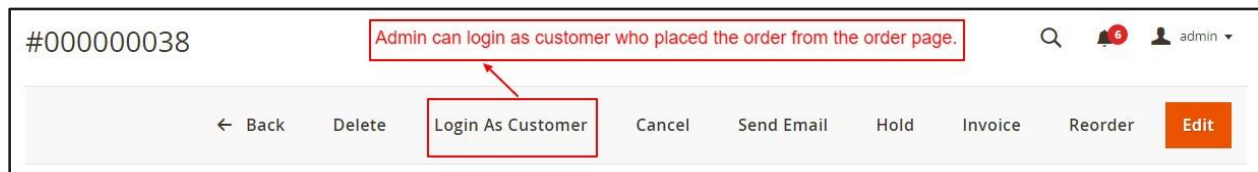
### 2.1 LOGIN FROM EDIT CUSTOMER PAGE

Go to Customers > All Customers > Click on the “Edit” link for given customer > Click on the “Login As Customer” button from the top bar.

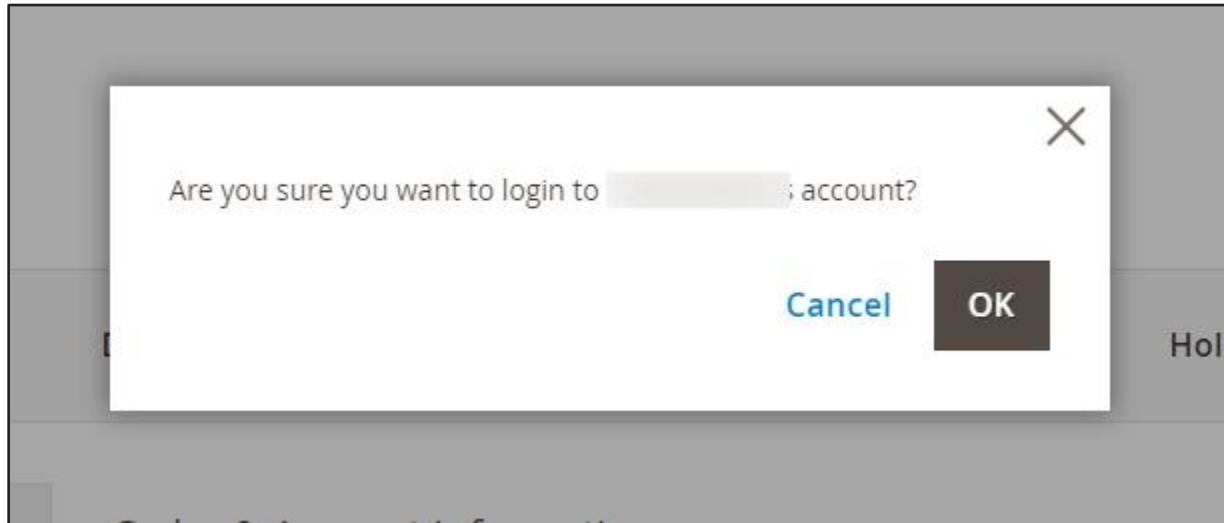


### 2.2 LOGIN FROM VIEW ORDER PAGE

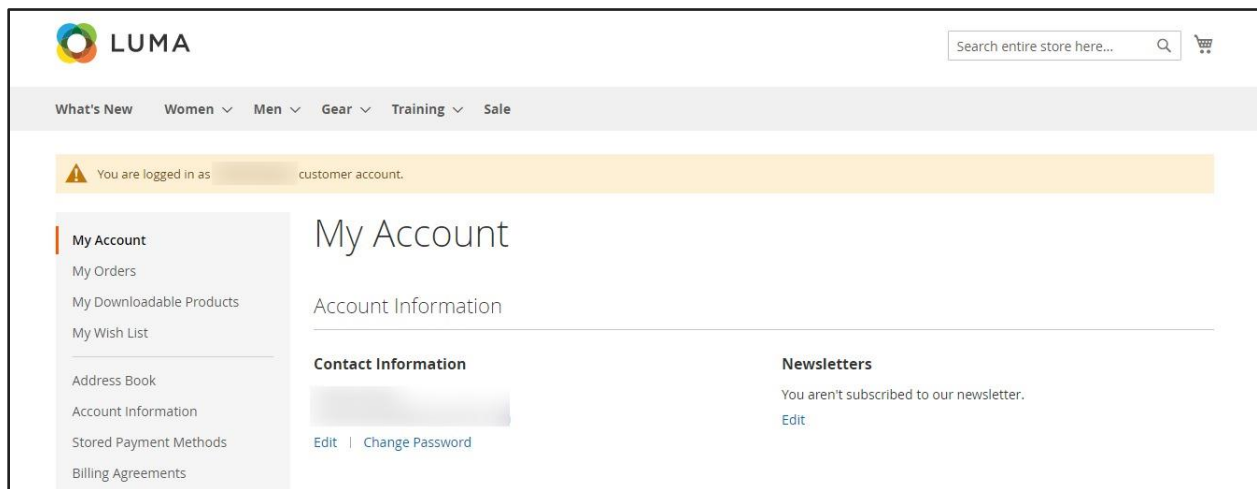
Go to Sales > Orders > Click on the “View” link for given order > Click on the “Login As Customer” button from the top bar.



On click of the “Login As Customer” button, a confirmation pop up will be shown like below.



On confirming, the admin will be logged in to that customer account.



### 3. LOGS OF ALL ADMINS' LOG IN DETAILS

You can find logs of all admins' login details from Reports > Customers > Login As Customer - Logs.

Login As Customer - Logs

Search by keyword

Actions  10 records found  per page  of 1

<input type="checkbox"/>	ID	Admin Id	Admin Name	Admin Email	Customer Id	Customer Name	Customer Email	Logged in At
<input type="checkbox"/>	2	1	Veronica Costello	roni_cost@example.com	1	Veronica Costello	roni_cost@example.com	Mar 18, 2020 9:48:59 AM
<input type="checkbox"/>	10	1	Veronica Costello	veronica@gmail.com	1	Veronica Costello	veronica@gmail.com	Apr 9, 2020 12:40:27 PM

### 4. RESTRICT OTHER ADMIN USERS TO ALLOW TO LOGIN TO CUSTOMER ACCOUNT

You can set permission to allow to login to customer account based on admin' role from System > Permission > User Roles > Add/Edit Role > Role Resources > Choose "Custom" from Resource Access dropdown.

Go to Sales > Operations > Orders > Actions > Check "Login As Customer" checkbox to enable "Login As Customer" button on the view order page for the given admin role.

Go to Customers > All Customers > Actions > Check "Login As Customer" checkbox to enable "Login As Customer" button on the edit customer page for the given admin role.

Resource Access Custom ▾

Resources

- ▶  Dashboard
- ▶  Analytics
  - ▶  API
- ▶  Manage Banners
  - ▶  Add New Banner
  - ▶  Edit Banner
  - ▶  Delete Banner
  - ▶  Change Banner Status
- ▶  Sales
  - ▶  Operations
    - ▶  Orders
      - ▶  Actions
        - ▶  Create
        - ▶  View
        - ▶  Login As Customer
        - ▶  Send Order Email
        - ▶  Reorder
        - ▶  Edit
        - ▶  Cancel
        - ▶  Accept or Deny Payment

You can provide or restrict any users to login as customer.