

Login As Customer for Magento 2

User Guide

Version 1.0

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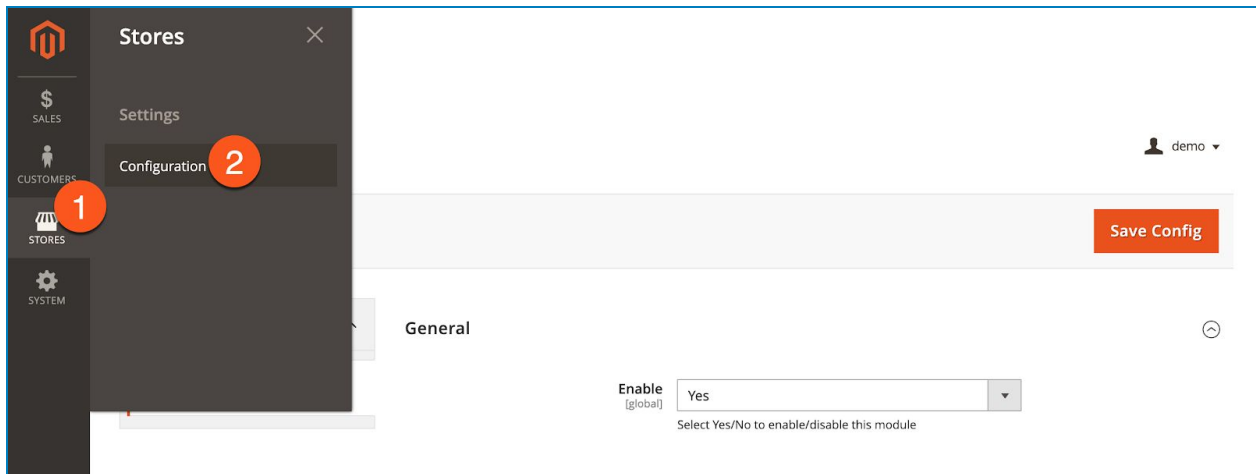
I) Introduction

Admin Payment Method for Magento 2 is a handy tool for your online store to create and manage your order within the admin dashboard only. This module will help you alleviate the restrictions of traditional payment methods in Magento 2 and make it easy to keep track of your online business.

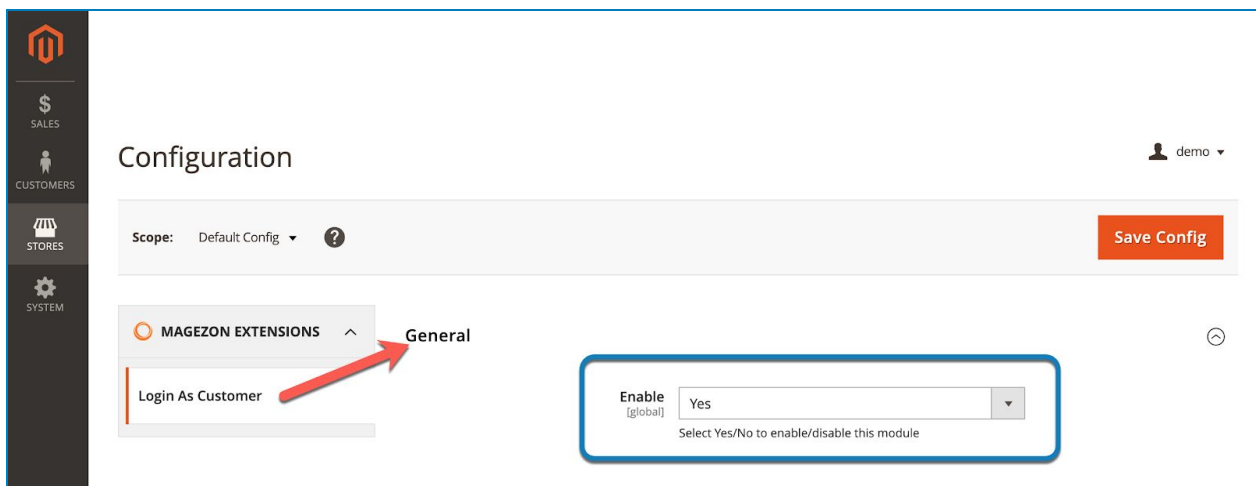
- Log in to customer accounts in one click
- Track and record all login actions
- Limit login permission to specific sub-admin users

II) Where to Find Extension

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

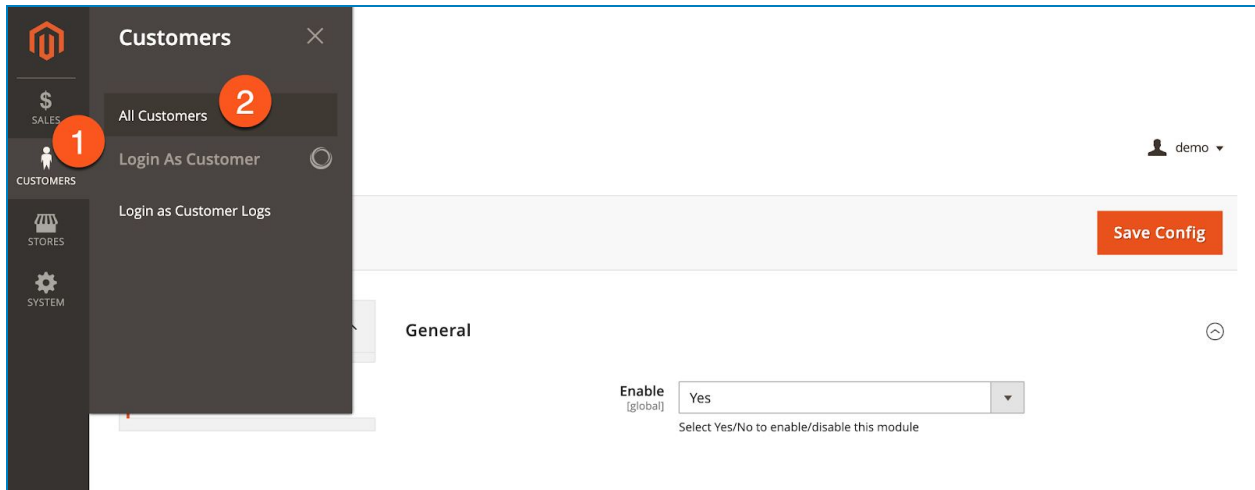


In the left panel, span **Magezon Extensions** and click **Login As Customer**. In the **General** section on the right-hand side, you can choose Yes/No from **Enable** drop-down to enable/disable the extension:

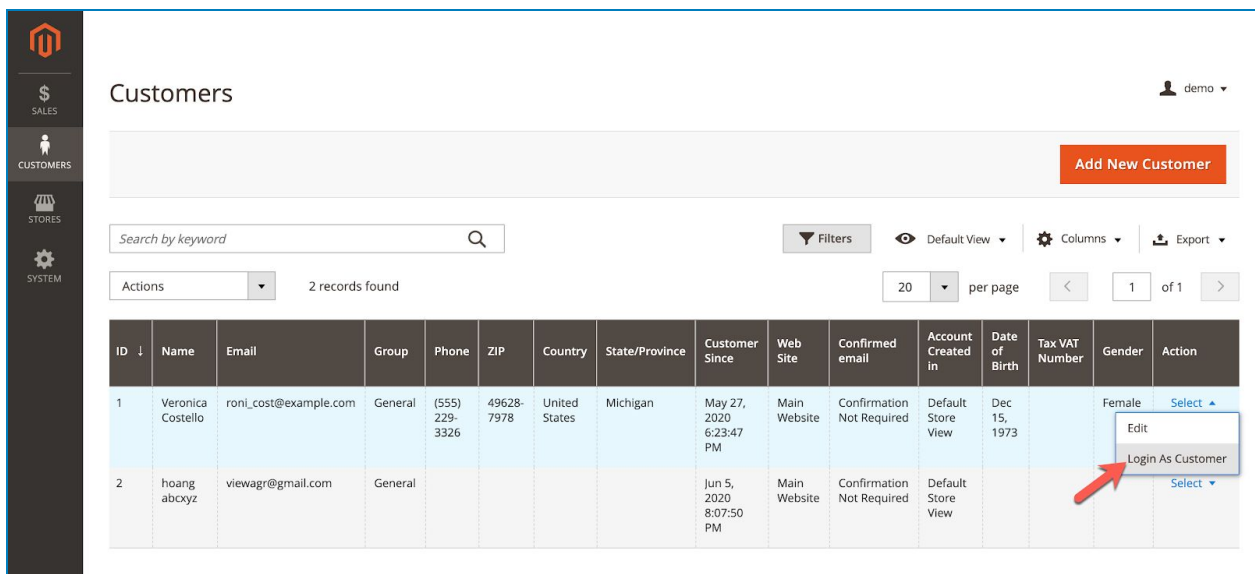


III) Log In From Customer Grid Page

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

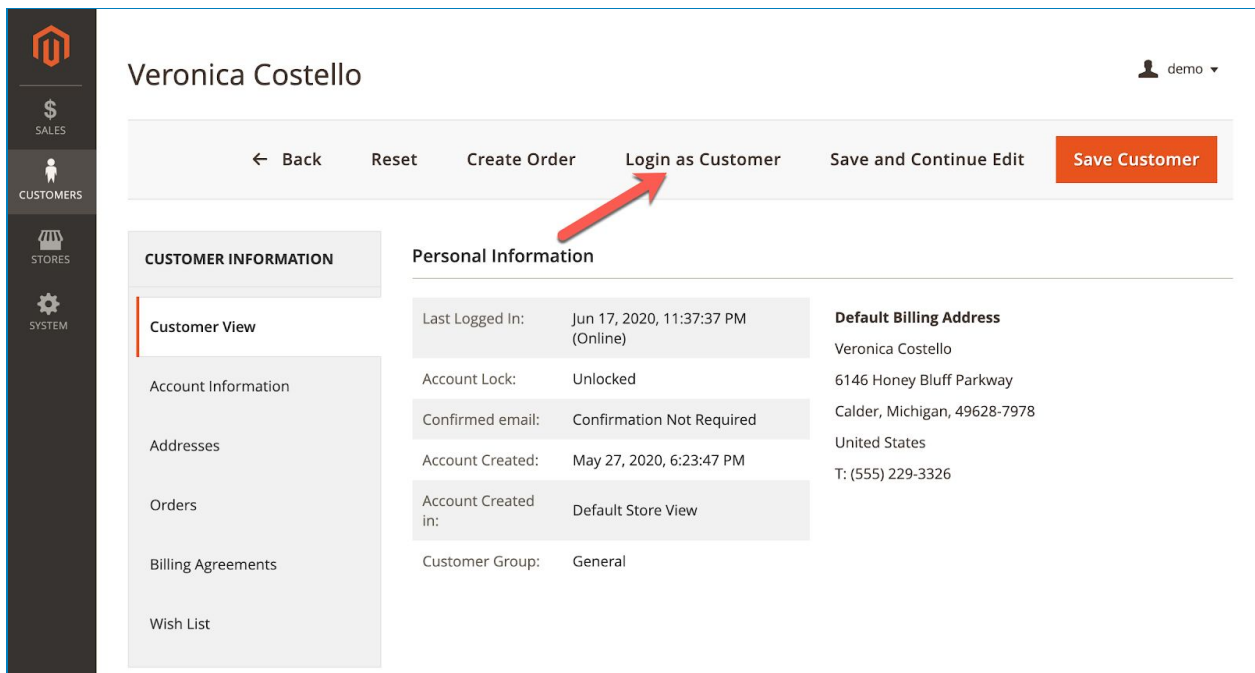


- In **Action** column, click **Select** drop-down list and click **Login As Customer** to log in to the account of your chosen customer:



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:



Veronica Costello demo ▾

← Back Reset Create Order **Login as Customer** Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Billing Agreements
- Wish List

Personal Information

Last Logged In:	Jun 17, 2020, 11:37:37 PM (Online)	Default Billing Address
Account Lock:	Unlocked	Veronica Costello
Confirmed email:	Confirmation Not Required	6146 Honey Bluff Parkway
Account Created:	May 27, 2020, 6:23:47 PM	Calder, Michigan, 49628-7978
Account Created in:	Default Store View	United States
Customer Group:	General	T: (555) 229-3326

V) Log In From Order Grid Page

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

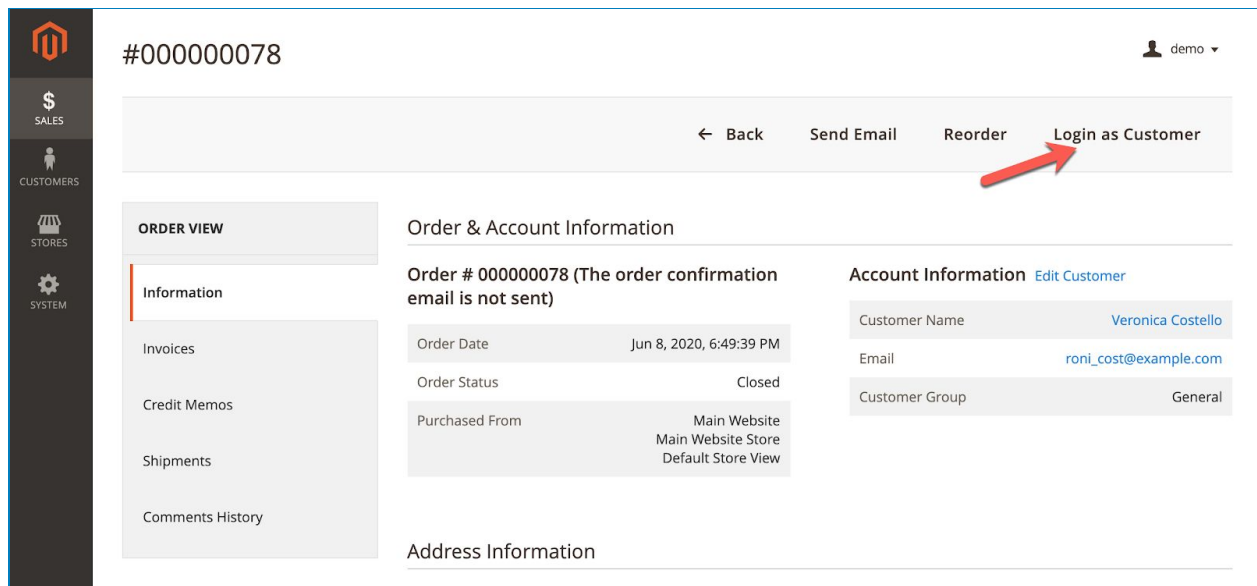
ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Signifyd Guarantee Decision
	Default Store View	Jun 8, 2020 6:49:39 PM	Veronica Costello	Veronica Costello	\$97.43	\$97.43	Closed	Select	
	Default Store View	Jun 8, 2020 6:49:03 PM	Veronica Costello	Veronica Costello	\$97.43	\$97.43	Closed	Select	
000000076	Main Website Main Website Store Default Store View	Jun 8, 2020 6:48:09 PM	Veronica Costello	Veronica Costello	\$97.43	\$97.43	Processing	Select	

- 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:

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 Website Store Default Store View	Jun 5, 2020 11:39:10 PM	Veronica Costello	Veronica Costello	\$97.43	\$97.43	Closed		Select <ul style="list-style-type: none"> View Login 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:



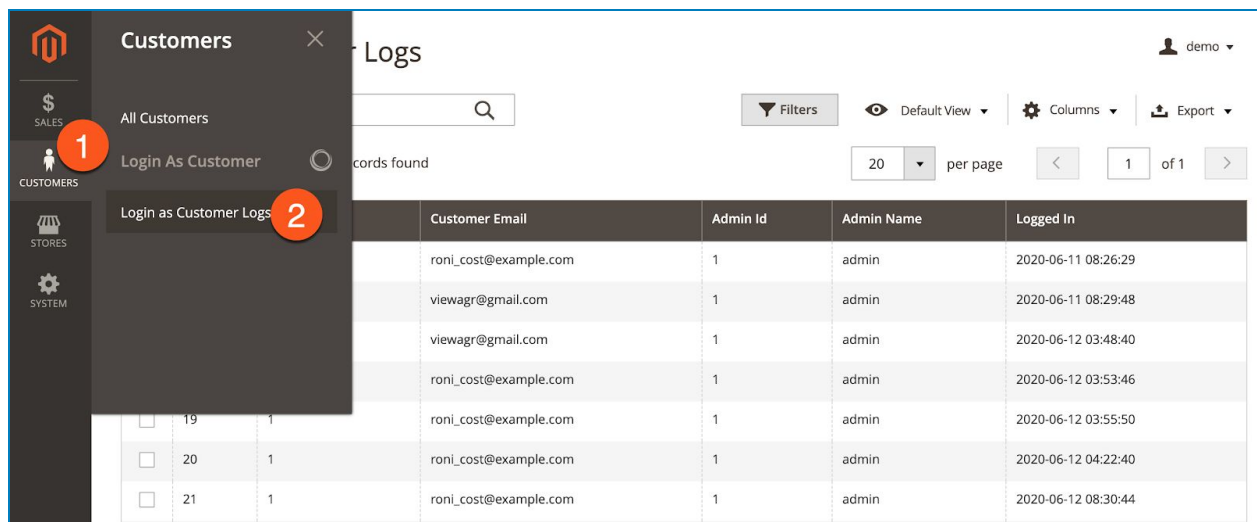
The screenshot displays the 'ORDER VIEW' page for order #000000078. The top navigation bar includes a 'Login as Customer' button, which is highlighted with a red arrow. The page is divided into several sections:

- ORDER VIEW** (Left sidebar): Information, Invoices, Credit Memos, Shipments, Comments History.
- Order & Account Information** (Main content):
 - Order # 000000078 (The order confirmation email is not sent)**
 - Order Date:** Jun 8, 2020, 6:49:39 PM
 - Order Status:** Closed
 - Purchased From:** Main Website, Main Website Store, Default Store View
- Account Information** (Right sidebar):
 - Customer Name:** Veronica Costello
 - Email:** roni_cost@example.com
 - Customer Group:** General

Additional elements include a top bar with '#000000078', a user profile 'demo', and a navigation bar with 'Back', 'Send Email', 'Reorder', and 'Login as Customer' buttons.

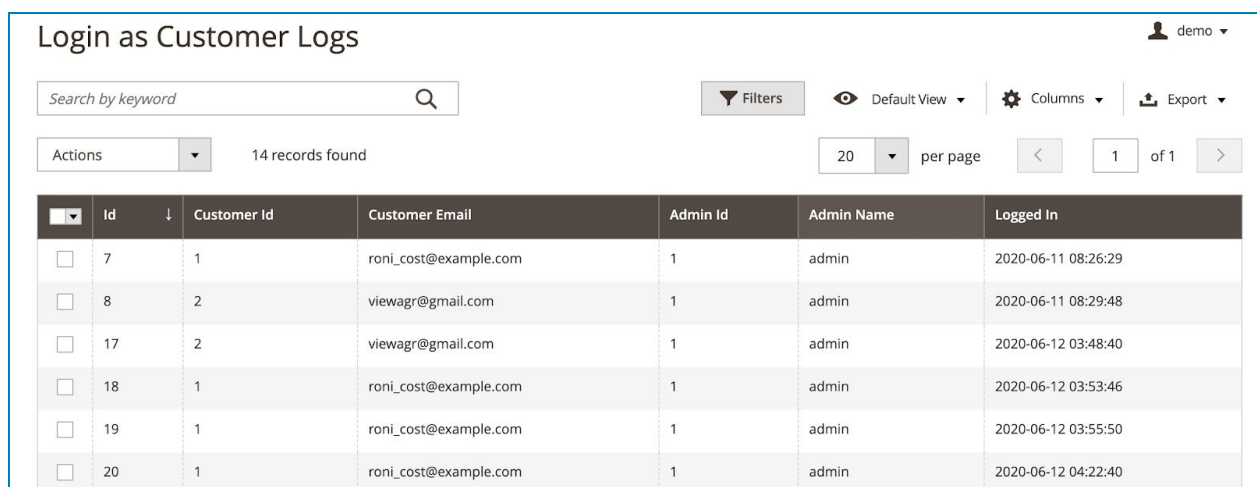
VII) Login Logs

- 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...**



	Customer Email	Admin Id	Admin Name	Logged In
	roni_cost@example.com	1	admin	2020-06-11 08:26:29
	viewagr@gmail.com	1	admin	2020-06-11 08:29:48
	viewagr@gmail.com	1	admin	2020-06-12 03:48:40
	roni_cost@example.com	1	admin	2020-06-12 03:53:46
<input type="checkbox"/>	roni_cost@example.com	1	admin	2020-06-12 03:55:50
<input type="checkbox"/>	roni_cost@example.com	1	admin	2020-06-12 04:22:40
<input type="checkbox"/>	roni_cost@example.com	1	admin	2020-06-12 08:30:44

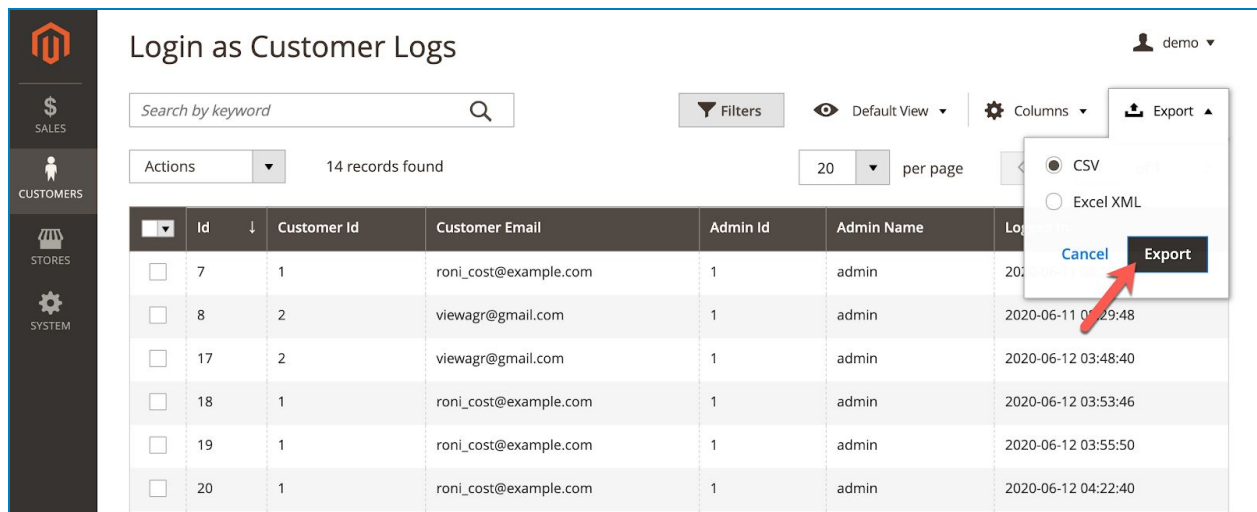
...where you can find a grid containing all login actions recorded:



	Id	Customer Id	Customer Email	Admin Id	Admin Name	Logged In
<input type="checkbox"/>	7	1	roni_cost@example.com	1	admin	2020-06-11 08:26:29
<input type="checkbox"/>	8	2	viewagr@gmail.com	1	admin	2020-06-11 08:29:48
<input type="checkbox"/>	17	2	viewagr@gmail.com	1	admin	2020-06-12 03:48:40
<input type="checkbox"/>	18	1	roni_cost@example.com	1	admin	2020-06-12 03:53:46
<input type="checkbox"/>	19	1	roni_cost@example.com	1	admin	2020-06-12 03:55:50
<input type="checkbox"/>	20	1	roni_cost@example.com	1	admin	2020-06-12 04:22:40

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.

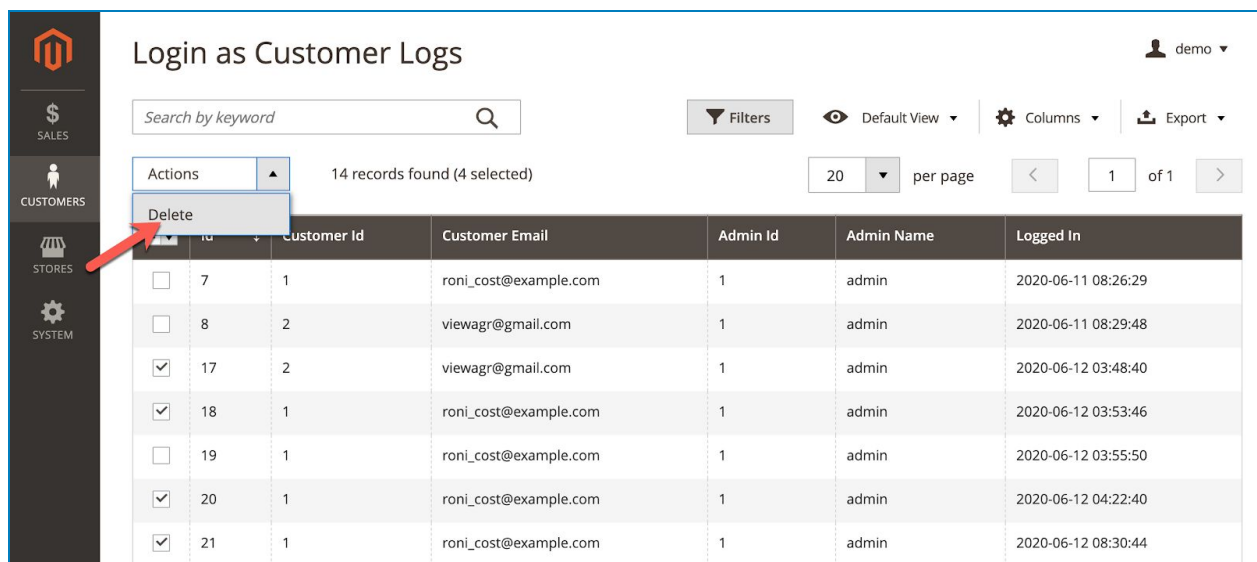
- Click **Export** button above the grid to export the log data to CSV or XML files for further user:



The screenshot shows the 'Login as Customer Logs' page with a sidebar on the left containing 'SALES', 'CUSTOMERS', 'STORES', and 'SYSTEM'. The main area has a search bar, filters, and an 'Export' button. A dropdown menu is open over the 'Export' button, showing options for 'CSV' (selected) and 'Excel XML'. A red arrow points to the 'Export' button in the dropdown menu.

Id	Customer Id	Customer Email	Admin Id	Admin Name	Logged In
7	1	roni_cost@example.com	1	admin	2020-06-11 08:26:29
8	2	viewagr@gmail.com	1	admin	2020-06-11 08:29:48
17	2	viewagr@gmail.com	1	admin	2020-06-12 03:48:40
18	1	roni_cost@example.com	1	admin	2020-06-12 03:53:46
19	1	roni_cost@example.com	1	admin	2020-06-12 03:55:50
20	1	roni_cost@example.com	1	admin	2020-06-12 04:22:40

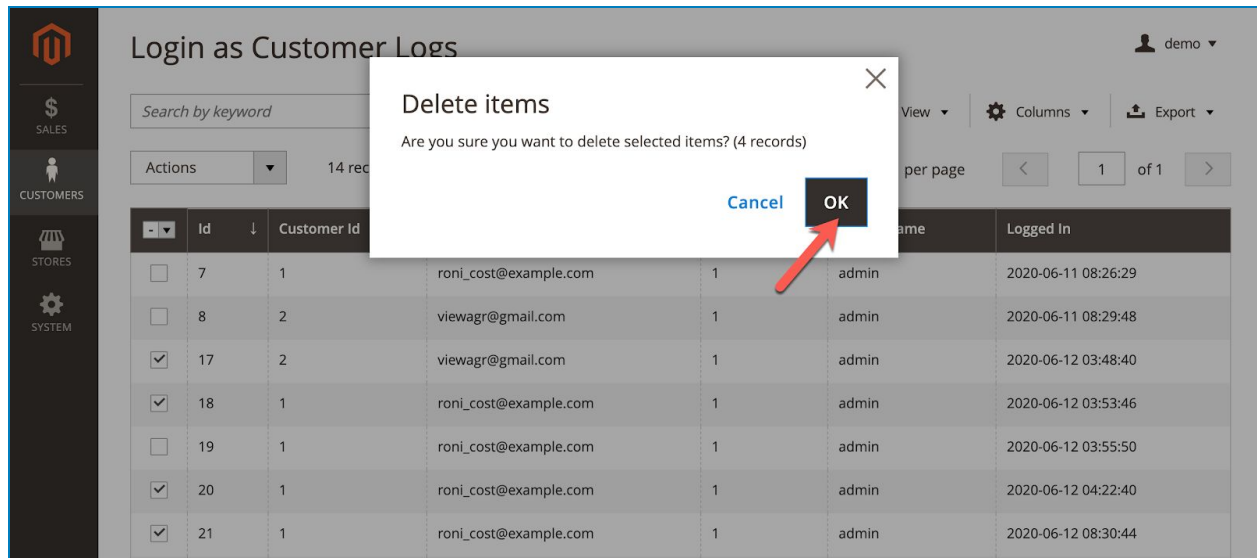
- Remove any log data from the grid by ticking the checkbox(es), then clicking the **Delete** option in **Actions** drop-down list:



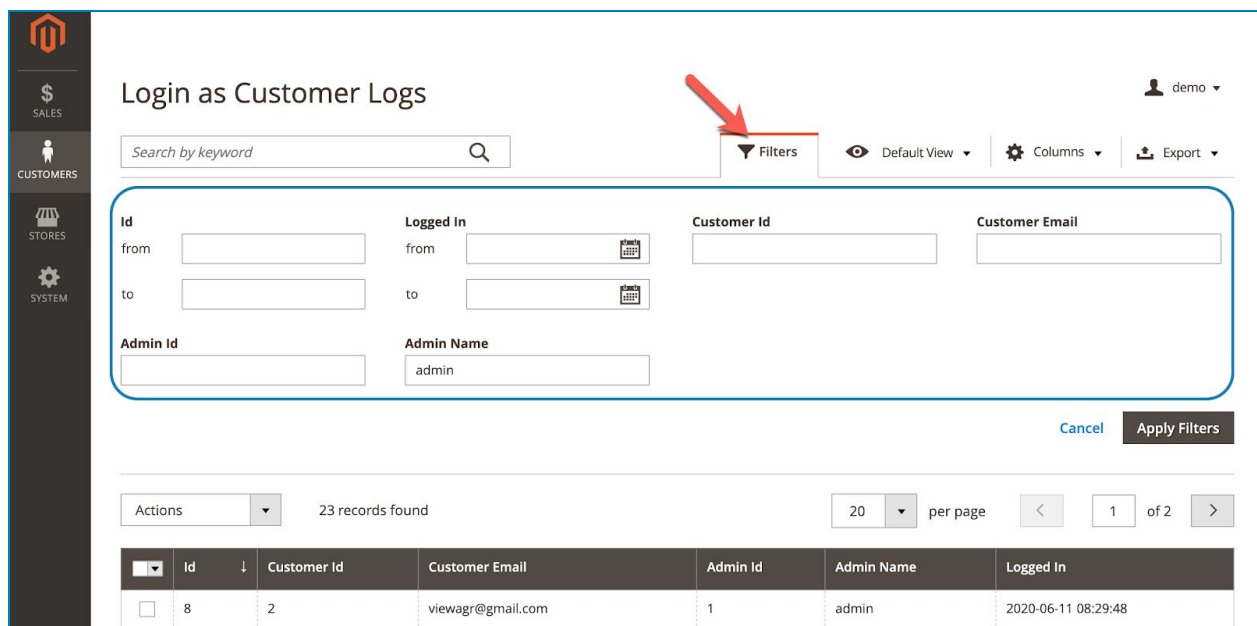
The screenshot shows the 'Login as Customer Logs' page with the 'Actions' dropdown menu open, showing the 'Delete' option. A red arrow points to the 'Delete' option. The grid shows 14 records found (4 selected), with rows 17, 18, 20, and 21 checked.

Id	Customer Id	Customer Email	Admin Id	Admin Name	Logged In
7	1	roni_cost@example.com	1	admin	2020-06-11 08:26:29
8	2	viewagr@gmail.com	1	admin	2020-06-11 08:29:48
<input checked="" type="checkbox"/>	17	viewagr@gmail.com	1	admin	2020-06-12 03:48:40
<input checked="" type="checkbox"/>	18	roni_cost@example.com	1	admin	2020-06-12 03:53:46
<input type="checkbox"/>	19	roni_cost@example.com	1	admin	2020-06-12 03:55:50
<input checked="" type="checkbox"/>	20	roni_cost@example.com	1	admin	2020-06-12 04:22:40
<input checked="" type="checkbox"/>	21	roni_cost@example.com	1	admin	2020-06-12 08:30:44

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

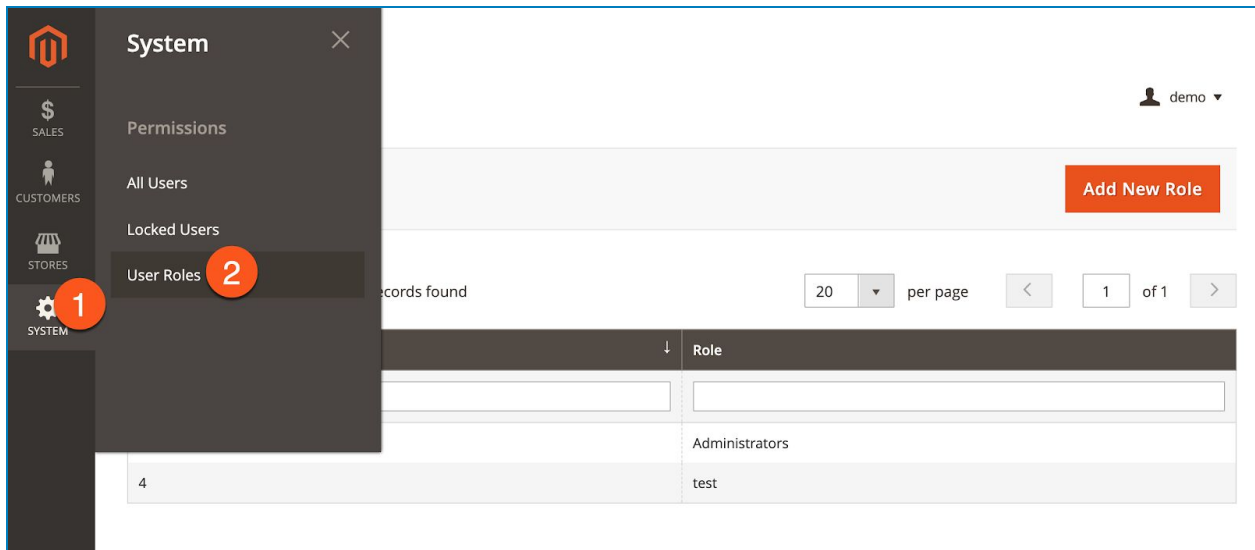


- Click the **Filter** button above the grid to filter the logs based on log Id, date range, Customer Id, Customer Email, Admin Id and Admin Name:

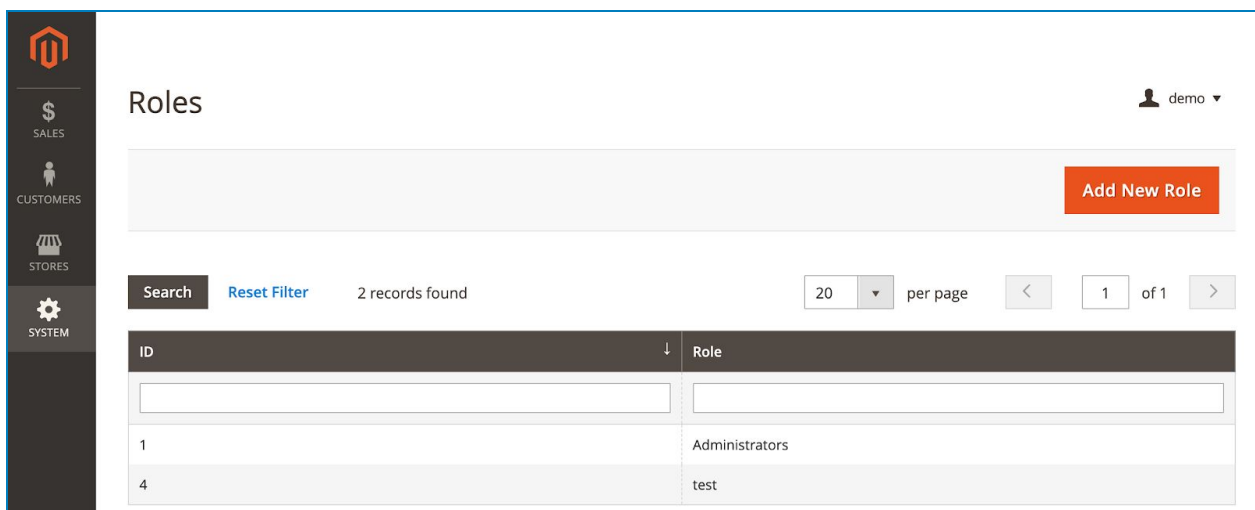


VIII) Limit Login Permission to Specific Sub-Admin Users

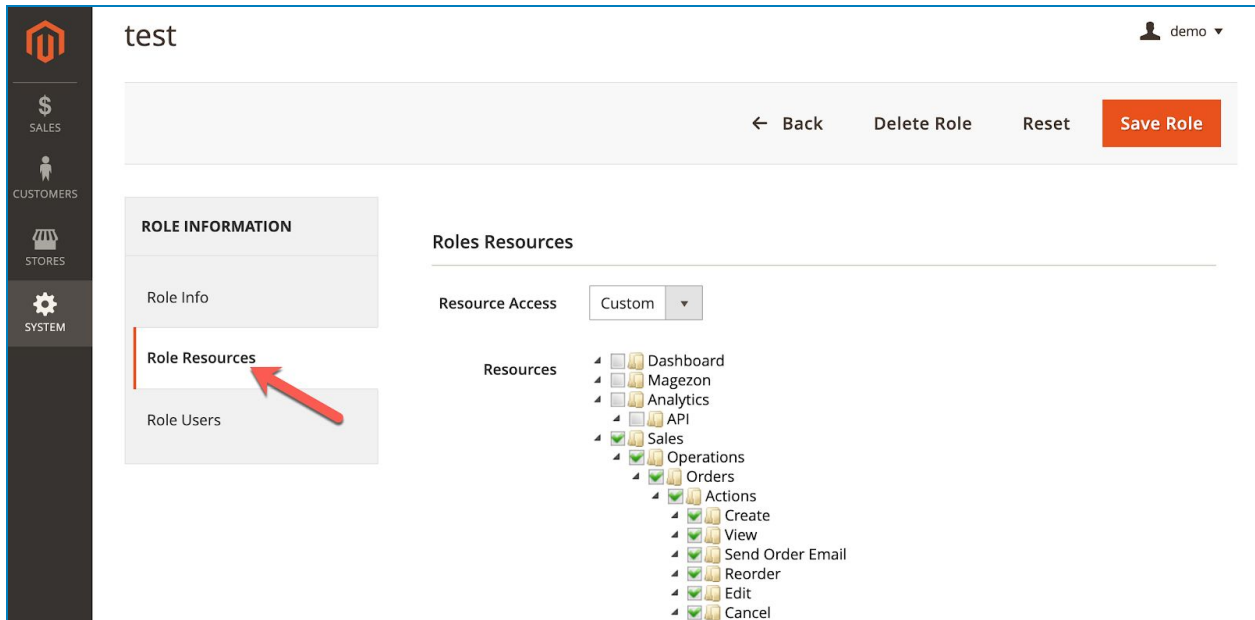
- Go to **System > Permissions > User Roles...**



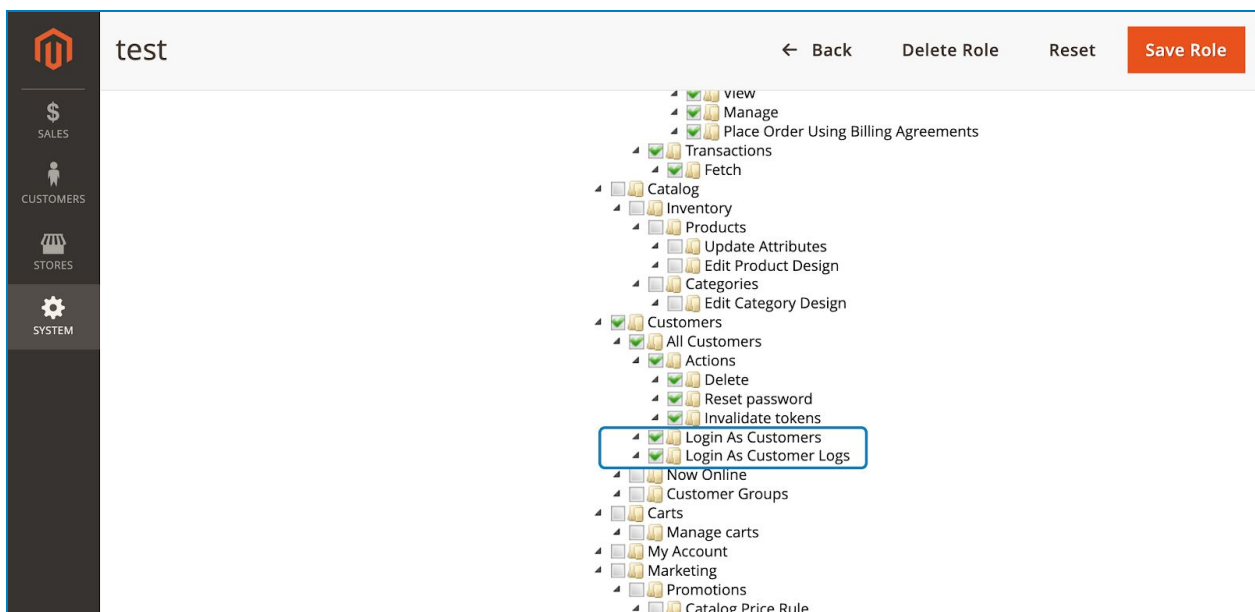
... where you can find all user roles in a grid:

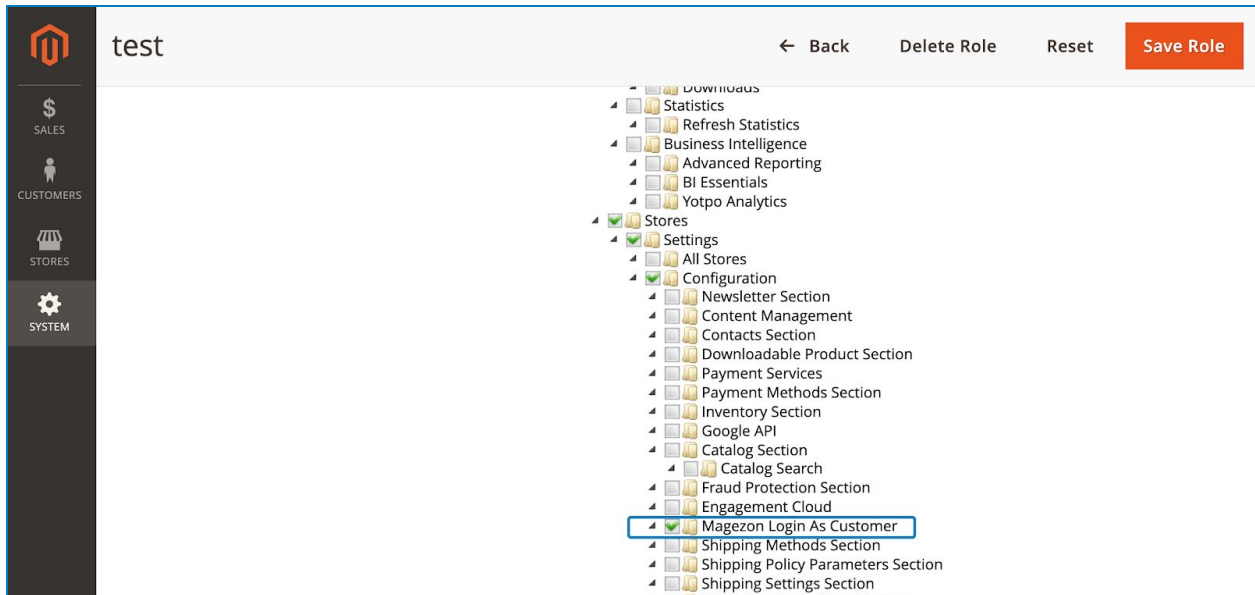


- Click on the user role whose login permission you want to modify. On the page you're navigated to, open the **Role Resources** tab in **Role Information** panel:



- In the right section, there are 3 options related to login permission:





- **Login As Customers:** if you tick the checkbox, then the user is given permission to log in to customer accounts from the [customer grid page](#), [customer view pages](#), [order grid page](#) and [order view pages](#).
- **Login As Customer Logs:** if you tick the checkbox, then the user is given permission to access [login logs](#).
- **Magezon Login As Customer:** if you tick the checkbox, then the user is given permission to enable/disable the extension in the [Configuration page](#).

IX) 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.