

Pending Registration extension for Magento2

User Guide

version 1.0



Contents

1. Introduction	3
2. Installation	3
2.1. System Requirements	3
2.2. Installation.....	3
2.3. License.....	3
3. How to Use.....	4
3.1. Settings.....	4
3.1.1. General Settings	4
3.1.2. Email Settings	4
3.1.3. Bulk Status Updater.....	5
3.2. Managing Customers' Statuses	6
3.2.1. Managing status from the list of customers	6
3.2.1. Managing status from the customer configuration page	7
3.3. Frontend.....	7

1. Introduction

The document is a User Guide for extension **Pending Registration** created for Magento2 websites. It describes the extension functionality and provides some tips for a quick start.

The purpose of the Pending Registration extension is to allow the web store administrator manually approve customers' registrations. Upon registration the customer's account gets the Pending status. Administrator either Approves the account or Declines it. Until approved the customer can't log in.

2. Installation

2.1. System Requirements

The extension requires Magento 2.x

2.2. Installation

The extension is provided as a .zip archive with the source code and the installation instructions.

Unpack the source code into **/app/code/Itoris/Itoris_PendingRegistration/** folder on your server. And run the following commands in the SSH console:

```
php bin/magento module:enable --clear-static-content Itoris_PendingRegistration  
php bin/magento setup:upgrade
```

Then log into Magento backend and flush cache in **System -> Cache Management -> Flush Magento Cache**

If you experience any issues with the extension installation please contact us here -

<https://www.itoris.com/contact-us.html>

2.3. License

The extension has full open source code. One license/purchase can be used on a single production Magento2 website and its development instances. The extension can be customized for the license owner needs. Redistribution of the extension or its parts is not allowed. Please read more details here -

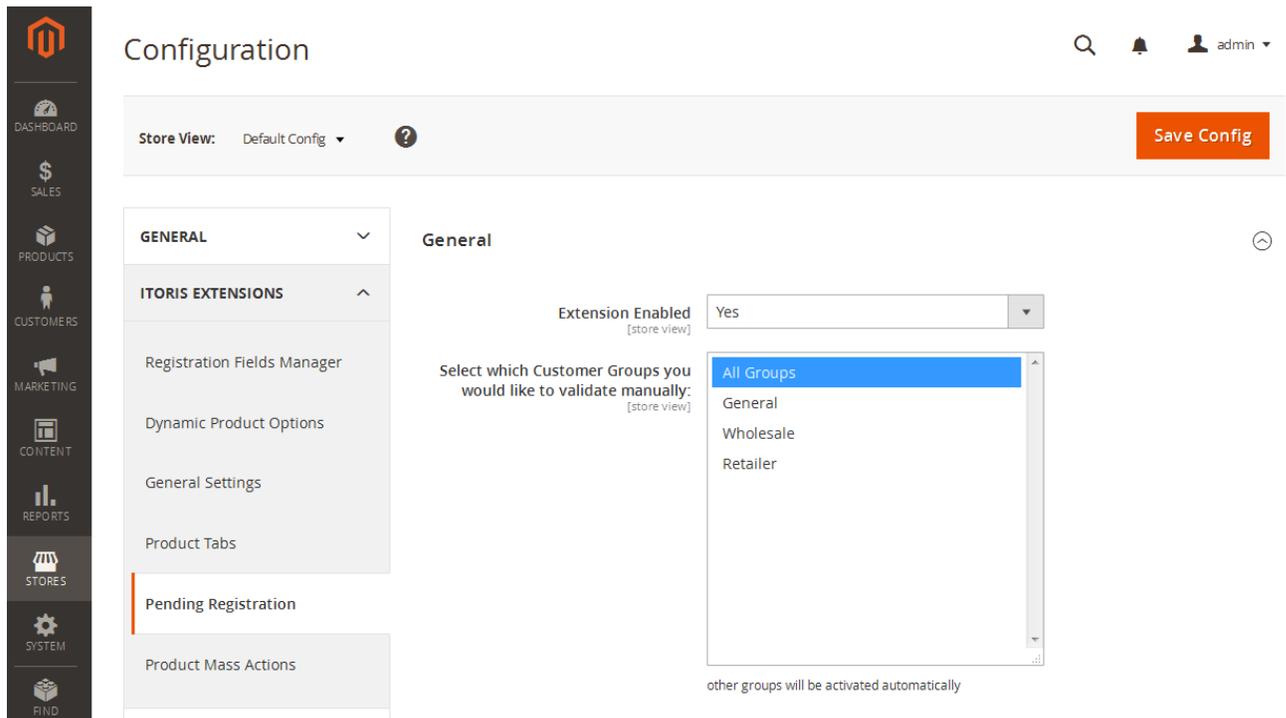
<https://www.itoris.com/magento-extensions-license.html>

3. How to Use

3.1. Settings

3.1.1. General Settings

General settings are available following **STORES -> Settings -> Configuration -> ITORIS EXTENSIONS -> Pending Registration -> General**.



The screenshot shows the 'Configuration' page for 'Pending Registration' in the 'General' section. The left sidebar contains navigation options: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND. The main content area has a 'Store View' dropdown set to 'Default Config' and a 'Save Config' button. The 'GENERAL' section is expanded to show 'ITORIS EXTENSIONS'. Under 'Pending Registration', the 'Extension Enabled' dropdown is set to 'Yes'. Below it, a multi-select dropdown titled 'Select which Customer Groups you would like to validate manually:' is open, showing 'All Groups', 'General', 'Wholesale', and 'Retailer'. A note below the dropdown states 'other groups will be activated automatically'.

Extension Enabled - Yes/No. Enables or disables the extension functionality.

Select which Customer Groups you would like to validate manually (multi-select). By default all customer groups will be validated manually. But you can set it to auto-approve specific groups. For instance, enable the manual approval for the wholesalers and let the general customers be approved automatically.

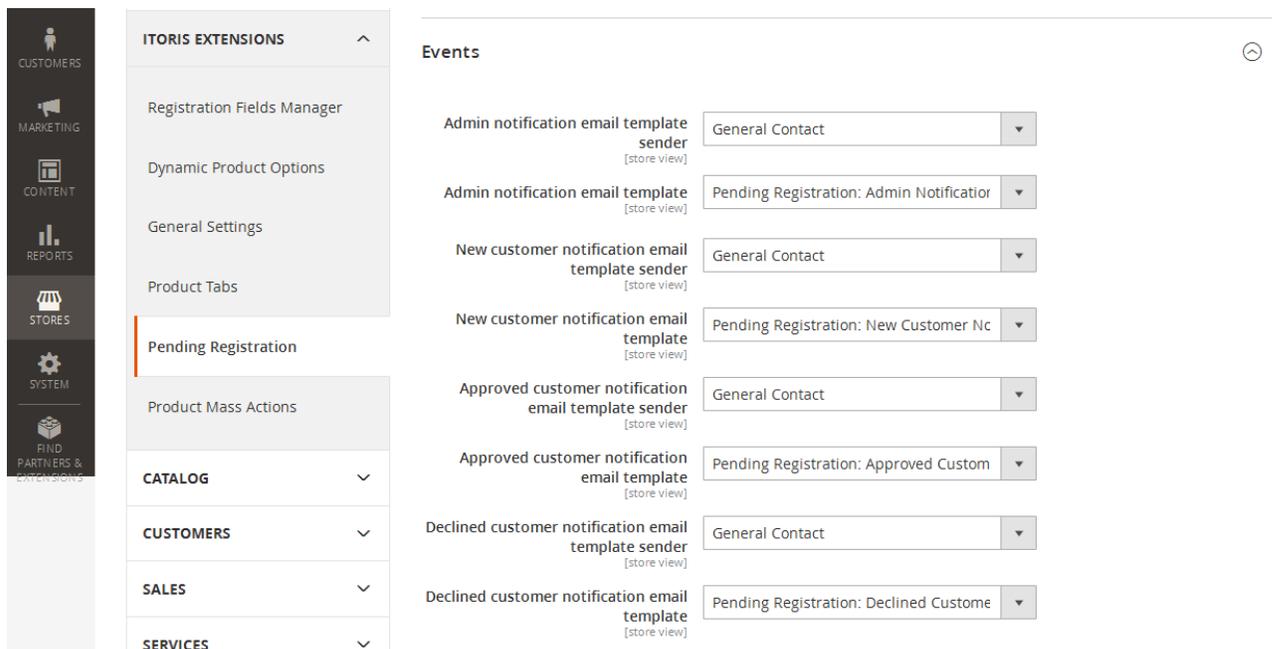
3.1.2. Email Settings

The extension sends 4 types of emails:

1. Notification to admin when new registration requires moderation
2. Notification to the customer when their registration requires moderation
3. Notification to the customer once the registration has been approved
4. Notification to the customer if the registration has been declined

All the emails can be customized and configured individually.

The email settings are available following **STORES -> Settings -> Configuration -> ITORIS EXTENSIONS -> Pending Registration -> Events**.



Admin notification email template sender. Select the sender the email will be sent from. You can edit senders following **STORES -> Settings -> Configuration -> GENERAL -> Store Email Addresses**

Admin notification email template. Here you can either disable this notification type (select "Disabled") or select the default email template provided with the extension, or select your custom email template. You can create a custom email template following **MARKETING -> Communications -> Email Templates**

New customer notification email template sender. Select the sender the email will be sent from.

New customer notification email template. Here you can either disable this notification type (select "Disabled") or select the default email template provided with the extension, or select your custom email template.

Approved customer notification email template sender. Select the sender the email will be sent from.

Approved customer notification email template. Here you can either disable this notification type (select "Disabled") or select the default email template provided with the extension, or select your custom email template.

Declined customer notification email template sender. Select the sender the email will be sent from.

Declined customer notification email template. Here you can either disable this notification type (select "Disabled") or select the default email template provided with the extension, or select your custom email template.

3.1.3. Bulk Status Updater

You can update the status for all existing customers following **STORES -> Settings -> Configuration -> ITORIS EXTENSIONS -> Pending Registration -> Existing users**

The screenshot shows the ITORIS system navigation menu on the left, with 'Pending Registration' highlighted. On the right, a dialog box titled 'Make all users status' is displayed. It features a dropdown menu with '-- Please Select --' and a 'Set Status' button. The dialog also includes labels for '[store view]' and '[website]'.

Make all users status. Choose either Pending or Approved and click "Set Status". The status will be applied to all customers currently available in the system.

3.2. Managing Customers' Statuses

3.2.1. Managing status from the list of customers

The extension adds another column "Status" to the list of customers **CUSTOMERS -> All Customers**.

The screenshot shows the 'Customers' list view. The table has the following columns: 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, and Status. The 'Status' column is highlighted with a red box. Two records are shown: one with status 'Approved' and one with status 'Pending'.

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	Status
1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Jul 15, 2016 7:20:35 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female	Edit	Approved
2	John Smith	john.smith@gmail.com	General					Jul 26, 2016 7:04:17 PM	Main Website	Confirmation Not Required	Default Store View				Edit	Pending

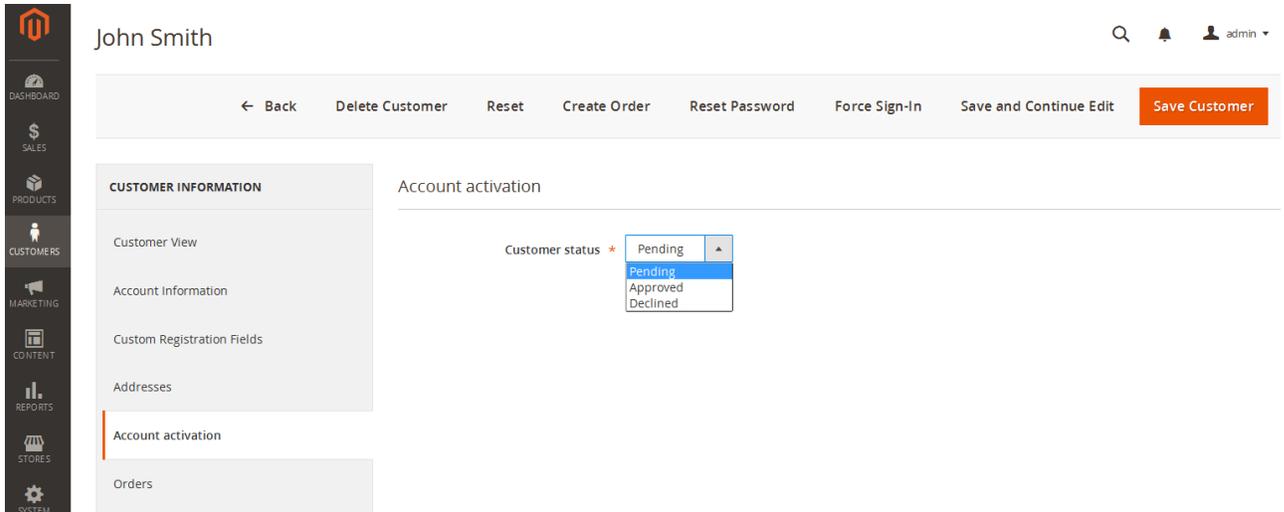
You can reorder the column if needed by dragging it. Or hide it using the grid Columns configuration. To edit the customer's status in the grid click on the status cell.

The screenshot shows the 'Customers' list view with a modal form open for editing a customer's status. The modal form has the following fields: 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, and Status. The 'Status' field is highlighted with a red box and has a dropdown menu with options: Pending, Approved, and Declined. The modal form also includes 'Cancel' and 'Save' buttons.

Choose the new status and click "Save". The email notification will be sent to the customer automatically.

3.2.1. Managing status from the customer configuration page

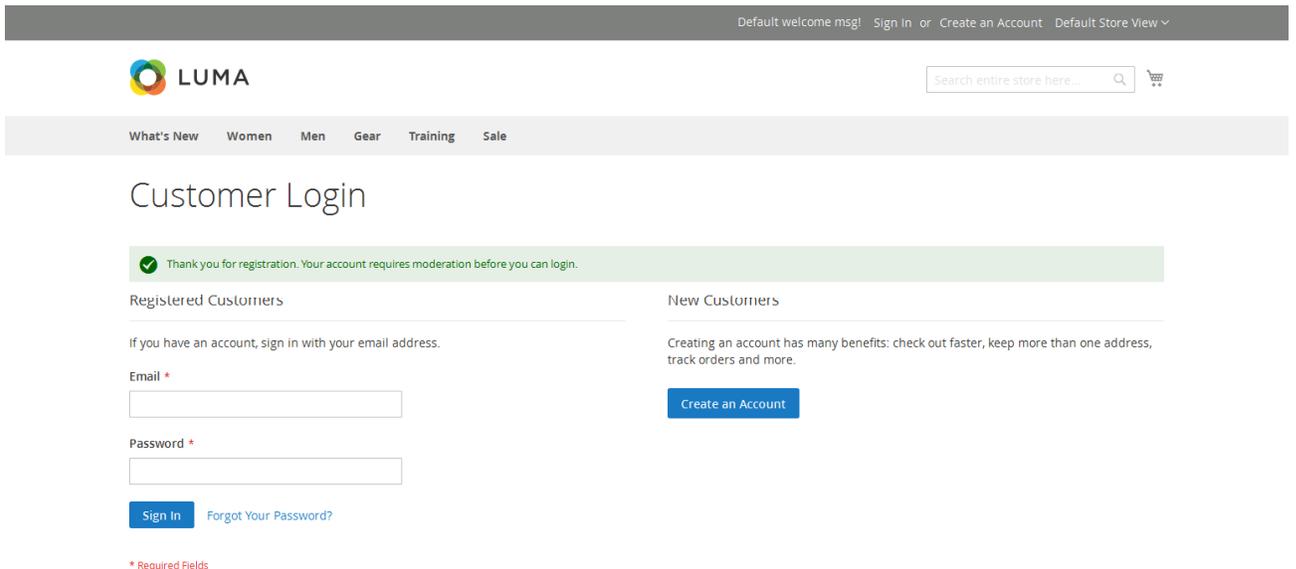
You can also manage the status from the customer configuration page **CUSTOMERS -> All Customers -> {customer} -> Account Activation**



Choose the new status and click "Save Customer". The email notification will be sent to the customer automatically.

3.3. Frontend

Upon registration message "Thank you for registration. Your account requires moderation before you can login." appears.



Customer will not be able to login. Message "Your account requires moderation" will be shown.

Customer Login

 Your account requires moderation

<p>Registered Customers</p> <hr/> <p>If you have an account, sign in with your email address.</p> <p>Email *</p> <input type="text"/>	<p>New Customers</p> <hr/> <p>Creating an account has many benefits: check out faster, keep more than one address, track orders and more.</p> <p>Create an Account</p>
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If the customer's registration was declined message "Your registration has been declined. Please contact the site administrator for more details" will be shown.

Customer Login

 Your registration has been declined. Please contact the site administrator for more details

<p>Registered Customers</p> <hr/> <p>If you have an account, sign in with your email address.</p> <p>Email *</p> <input type="text" value="admin"/>	<p>New Customers</p> <hr/> <p>Creating an account has many benefits: check out faster, keep more than one address, track orders and more.</p> <p>Create an Account</p>
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