Create User on Order for WooCommerce

Part 1: Introduction

Save time and simplify your life by having the ability to create a new Customer directly on the WooCommerce Order screen.

What it Does

This plugin is a must-have for any WooCommerce store; we too are Shop Managers and developed this to greatly simplify our workflow.

The Current Situation

Currently, to create a new Order manually for a new Customer, a Shop Manager needs to go to the User section, create the new User, choose a random username, add a temporary password manually, email that password in the clear (security risk). Once the User is created the Manager can navigate BACK to the Order screen to create a new Order for that Customer. (Hassle)

Our Plugin

Now, with this plugin, all you need to do is add a new Order and click the Create Customer button. Fill in their email address (and First & Last Name if you have them) - and that's it. The Order can then be completed for that new User without leaving the screen.

Create User on Order then takes care of the previously time consuming work by immediately and automatically sending the customer an email detailing how to securely set a password and log into their new account.

AND the Shop Manager can then save the billing and shipping addresses BACK to the Customer profile directly from the new Order. Which by itself is an incredibly useful piece of functionality.

Once the new Order is created, the Manager can email the invoice for payment directly to that new customer in the standard way.

Great For:
- ➜ Creating orders manually for new customers, over-the-phone or email
- ➜ Saving time and effort for Managers.
- ➜ Generating sales and engagement by minimising the hassle for customers
- ➜ Assisting customers with difficulty ordering for the first time
- ➜ Empowering customer service managers with better, more efficient tools
- ➜ Any WooCommerce store!
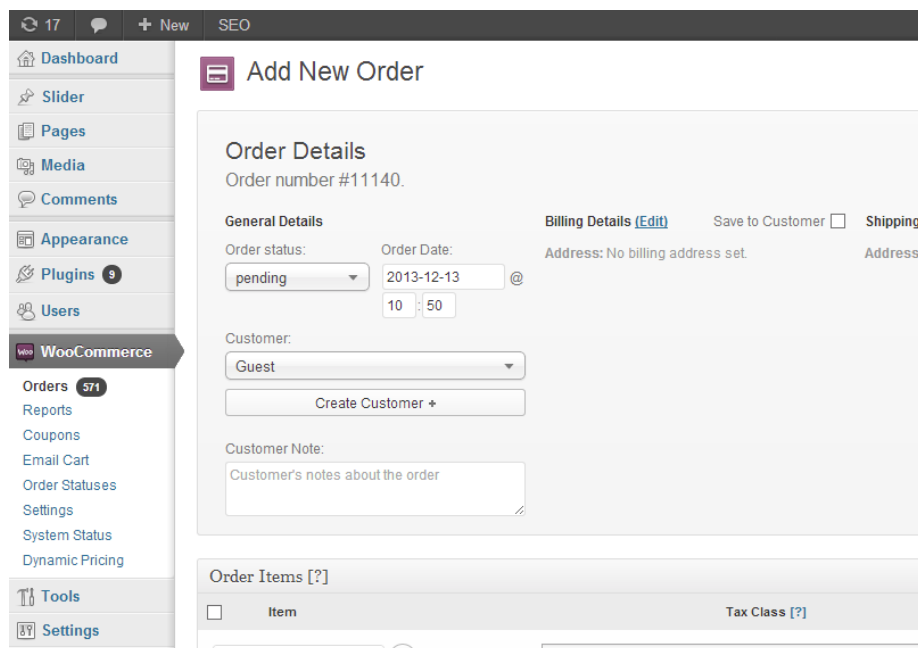
Happy Conversions from the CX Team

Part 2: Documentation

Installing the Plugin:
- ➜ Make sure that WooCommerce 2.0+ is installed and working on your site. For instructions on installing the WooCommerce plugin see here.
- ➜ Install the Create User on Order plugin into your WordPress installation by following the normal steps here.

Using the Plugin
- ➜ Add a new Order in Wordpress in the normal way by clicking on Add Order
- ➜ Click the new "Create Customer" button generated by the plugin.

➔ Fill in the new Customer's Firstname, Lastname and Email Address.

➔ Only Email Address is required

➔ When you click the "Create Customer +" button the User will be saved. Their Nickname and Displayname will be dynamically set using a combo of Firstname Lastname, and if they are left blank it will use the first part of their email up to the "@"

➔ Following this an email will be sent to them with information about how to set their password for the first time.

➔ From this point the customer can log into and use their account in the site while you continue fulfilling their first order.

➔ You can now go ahead and add the Billing Address and by checking the "Save to Customer" checkbox save that address straight back to the Customer's User profile for use in later Orders.

➔ Repeat this process for the Shipping Address too.

➔ There is no Settings page for this plugin.

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