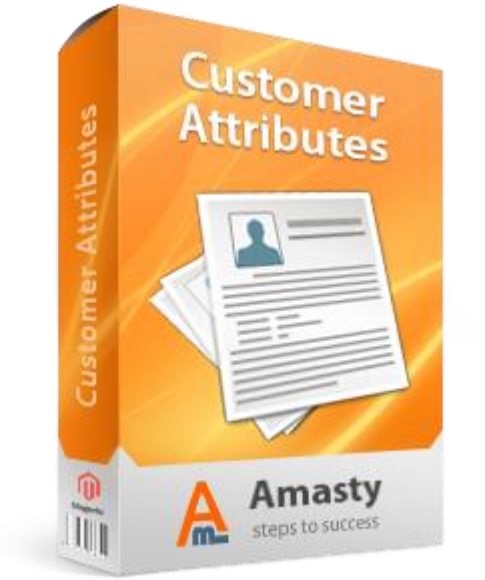
Customer Attributes



Magento Extension User Guide

Official extension page: Customer Attributes

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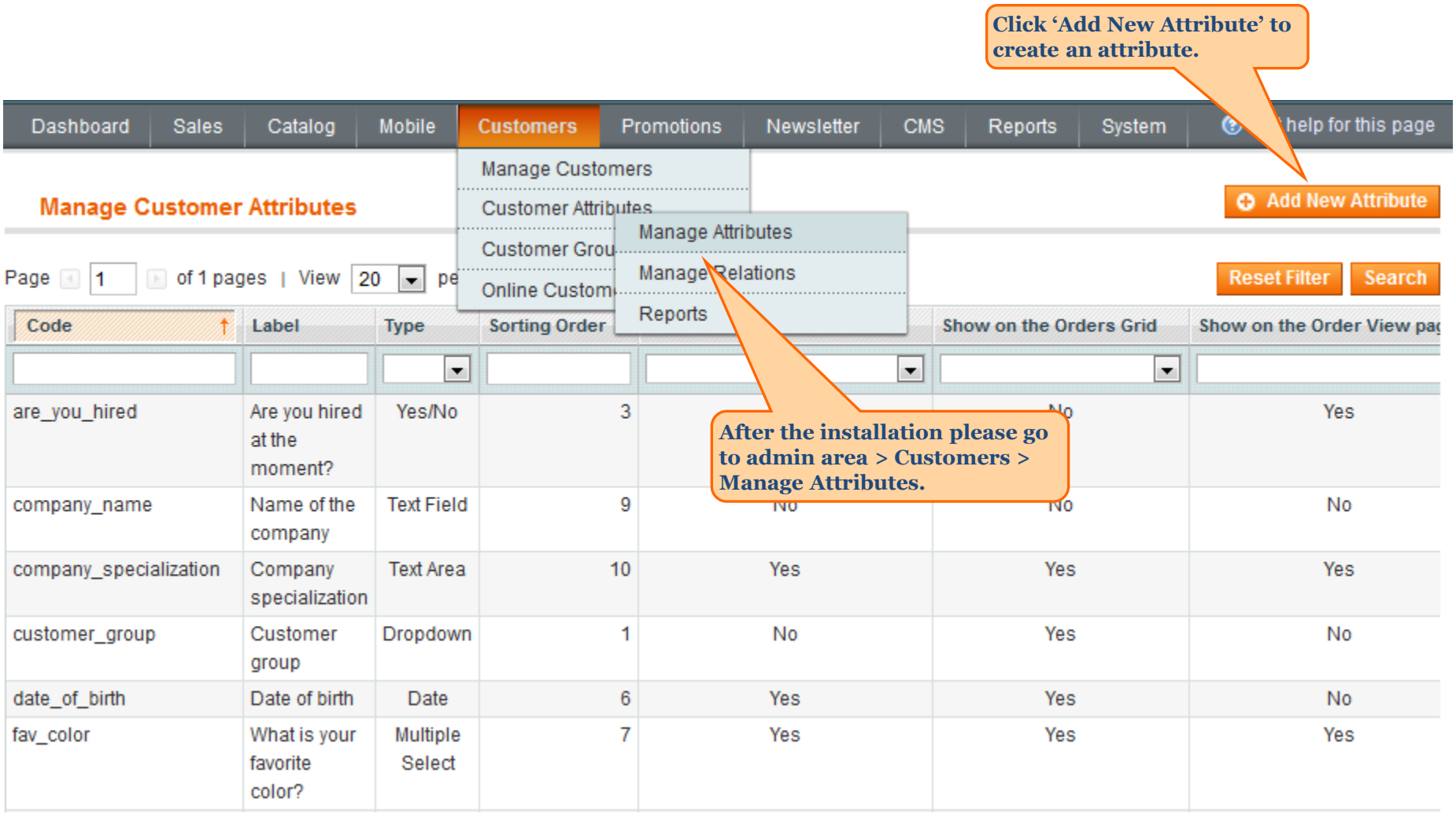
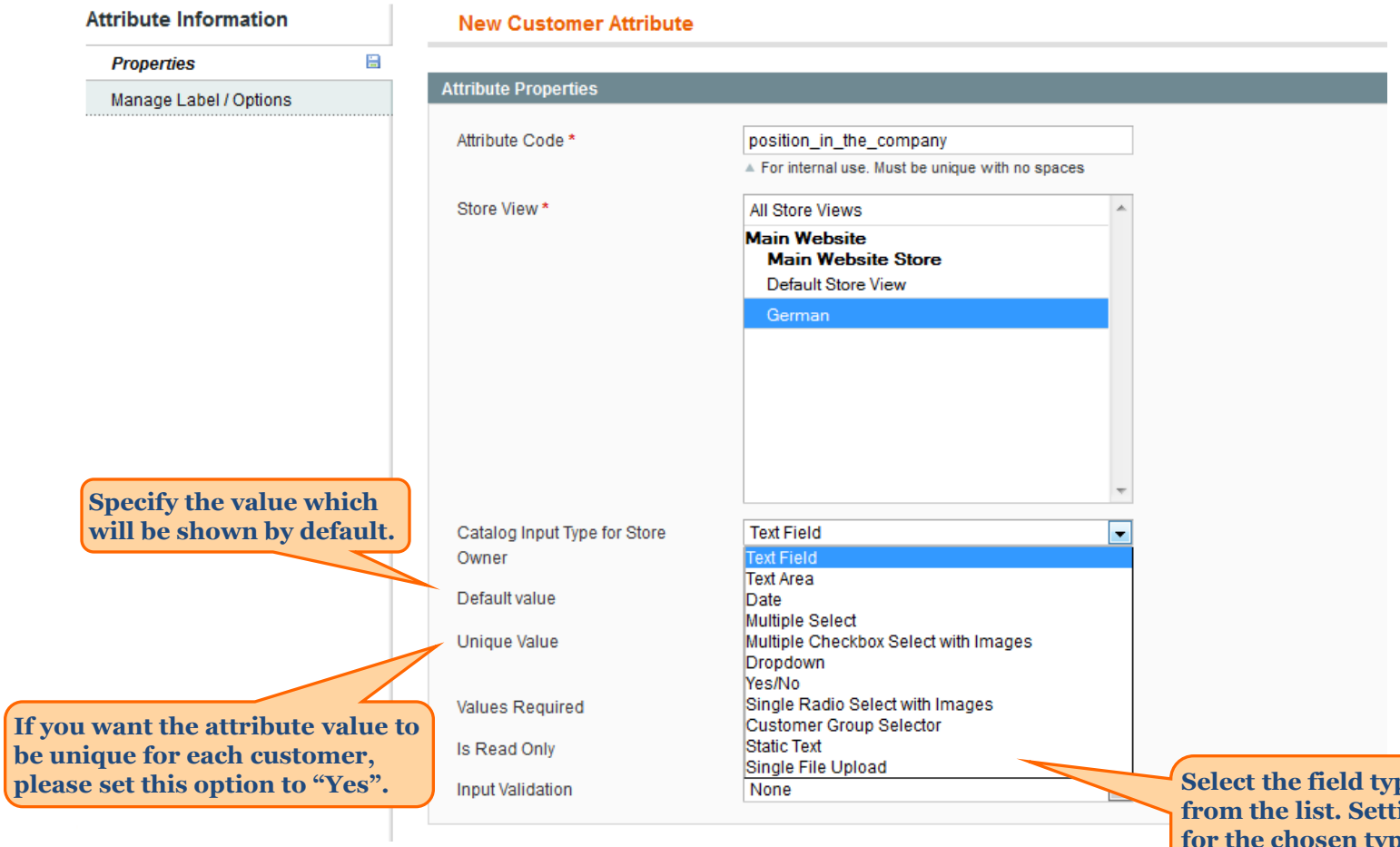
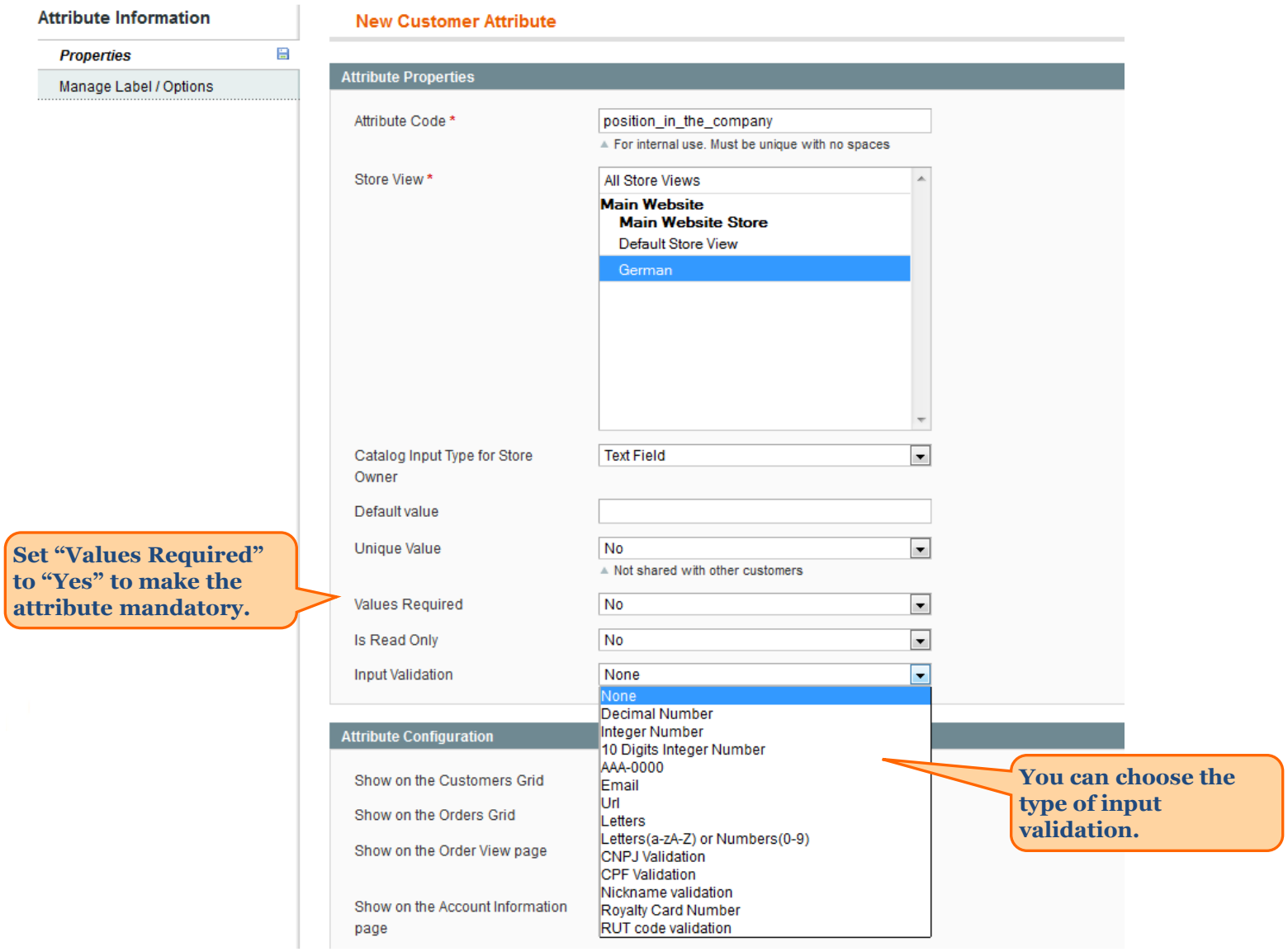
1. How to create customer attributes

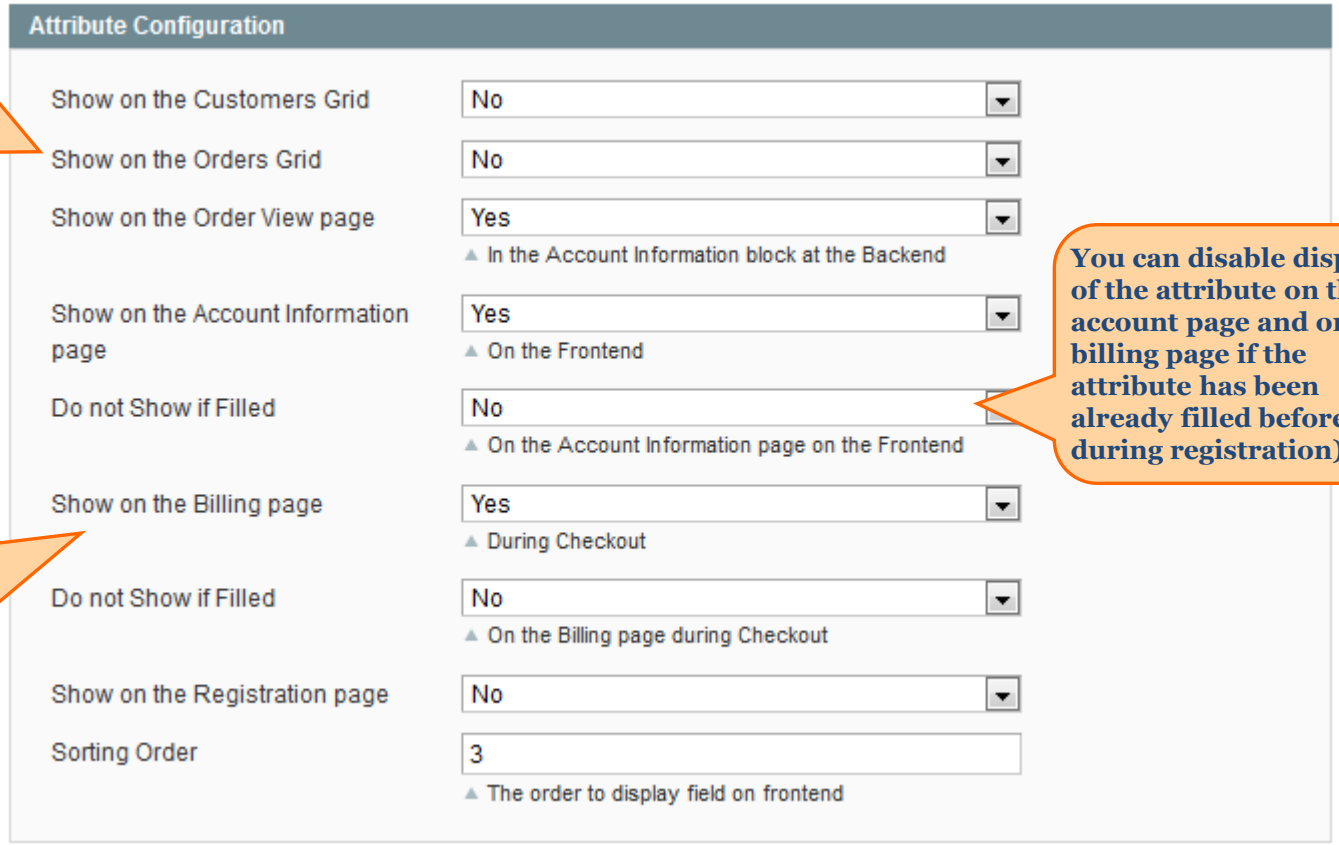


Code	Label	Type	Sorting Order		Show on the Orders Grid	Show on the Order View pag
are_you_hired	Are you hired at the moment?	Yes/No	3		No	Yes
company_name	Name of the company	Text Field	9		No	No
company_specialization	Company specialization	Text Area	10	Yes	Yes	Yes
customer_group	Customer group	Dropdown	1	No	Yes	No
date_of_birth	Date of birth	Date	6	Yes	Yes	No
fav_color	What is your favorite color?	Multiple Select	7	Yes	Yes	Yes


Attribute Information
Properties
Manage Label / Options
New Customer Attribute
Attribute Properties
Attribute Code *
position_in_the_company
For internal use. Must be unique with no spaces
Store View *
All Store Views
Main Website
Main Website Store
Default Store View
German
Catalog Input Type for Store Owner
Text Field
Default value
Unique Value
Values Required
Is Read Only
Input Validation
None
Text Field
Text Area
Date
Multiple Select
Multiple Checkbox Select with Images
Dropdown
Yes/No
Single Radio Select with Images
Customer Group Selector
Static Text
Single File Upload
Specify the value which will be shown by default.
If you want the attribute value to be unique for each customer, please set this option to "Yes".
Select the field type from the list. Settings for the chosen type will appear.

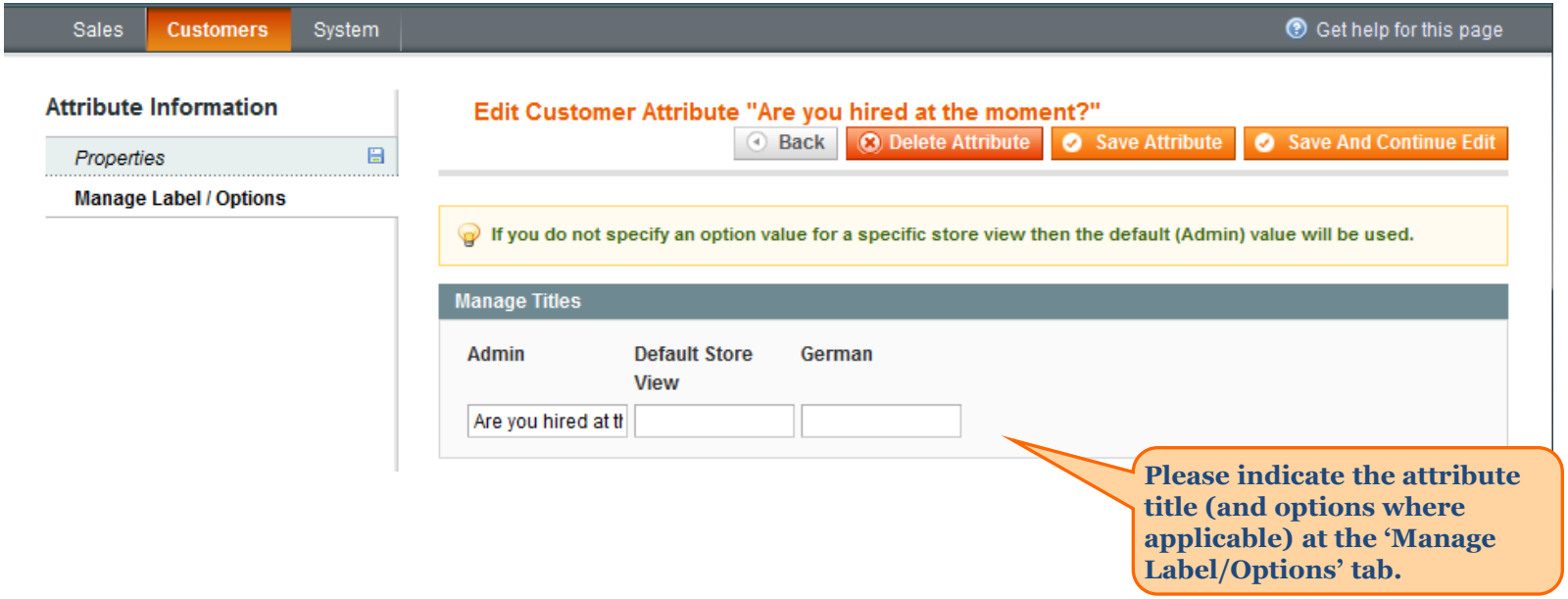

Attribute Information
Properties
Manage Label / Options
New Customer Attribute
Attribute Properties
Attribute Code *
position_in_the_company
For internal use. Must be unique with no spaces
Store View *
All Store Views
Main Website
Main Website Store
Default Store View
German
Catalog Input Type for Store Owner
Text Field
Default value
Unique Value
No
Not shared with other customers
Values Required
No
Is Read Only
No
Input Validation
None
None
Decimal Number
Integer Number
10 Digits Integer Number
AAA-0000
Email
Url
Letters
Letters(a-zA-Z) or Numbers(0-9)
CNPJ Validation
CPF Validation
Nickname validation
Royalty Card Number
RUT code validation
Attribute Configuration
Show on the Customers Grid
Show on the Orders Grid
Show on the Order View page
Show on the Account Information page
Set "Values Required" to "Yes" to make the attribute mandatory.
You can choose the type of input validation.

You can add the attribute columns to grids on 'Manage Customers' and 'Orders' pages. It is also possible to show them on the order view pages in admin panel and in customer's account.

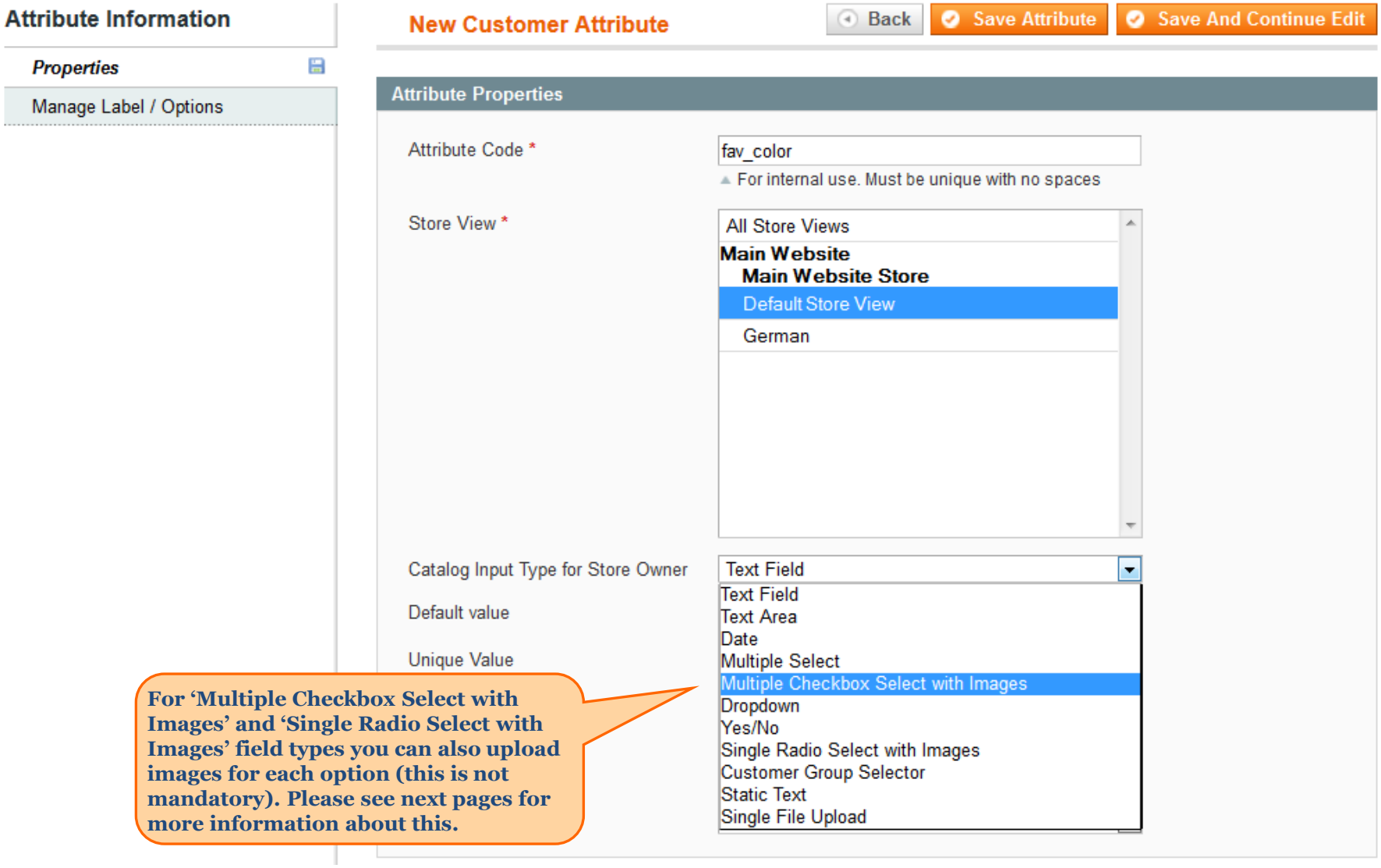


You can disable display of the attribute on the account page and on the billing page if the attribute has been already filled before (e.g. during registration)

You can add the attributes to the billing information page of checkout (for those customers who register during checkout), registration page and choose sorting order.

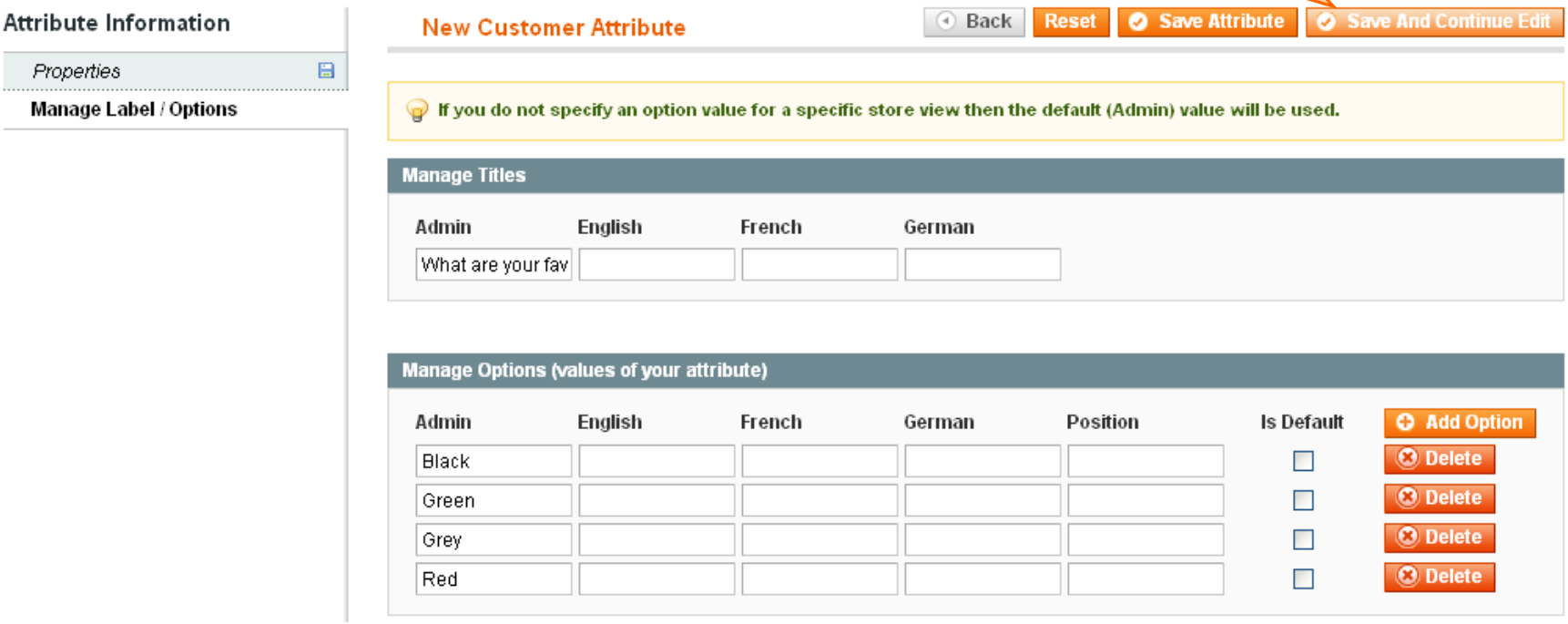

Sales
Customers
System
Get help for this page
Attribute Information
Properties
Manage Label / Options
Edit Customer Attribute "Are you hired at the moment?"
Back
Delete Attribute
Save Attribute
Save And Continue Edit
If you do not specify an option value for a specific store view then the default (Admin) value will be used.
Manage Titles
Admin
Default Store View
German
Are you hired at th
Please indicate the attribute title (and options where applicable) at the 'Manage Label/Options' tab.

2. Types of attributes which support images

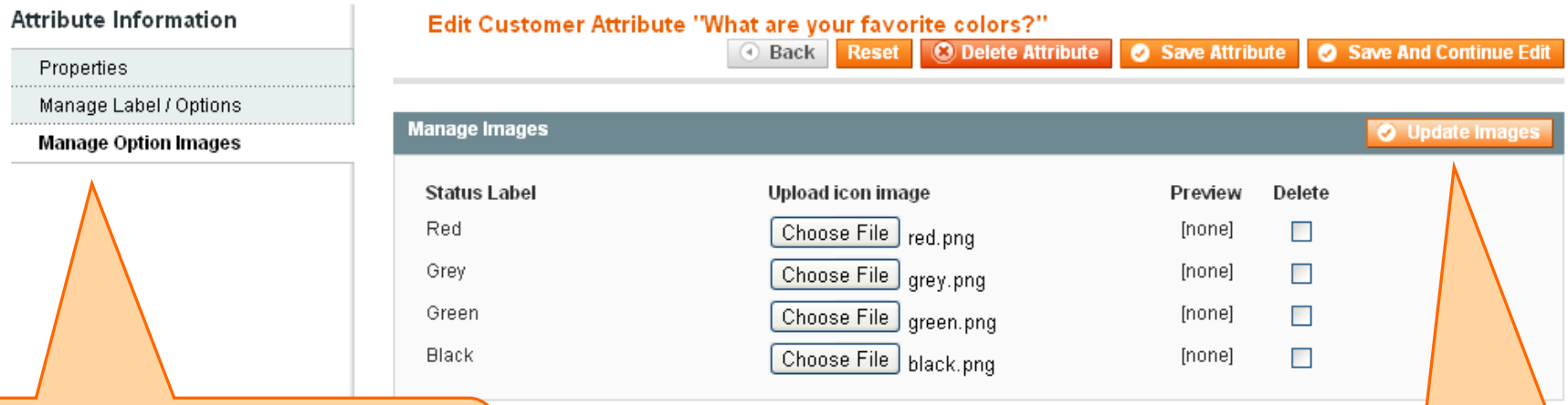


2. Types of attributes which support images

After you've indicated all the necessary options for 'Multiple Checkbox Select with Images' (or 'Single Radio Select with Images') field type attribute, please press 'Save and Continue Edit' button. 'Manage Option Images' tab will appear. If would like to create checkbox attribute or radio button attribute without images, just press 'Save Attribute' without uploading the images.



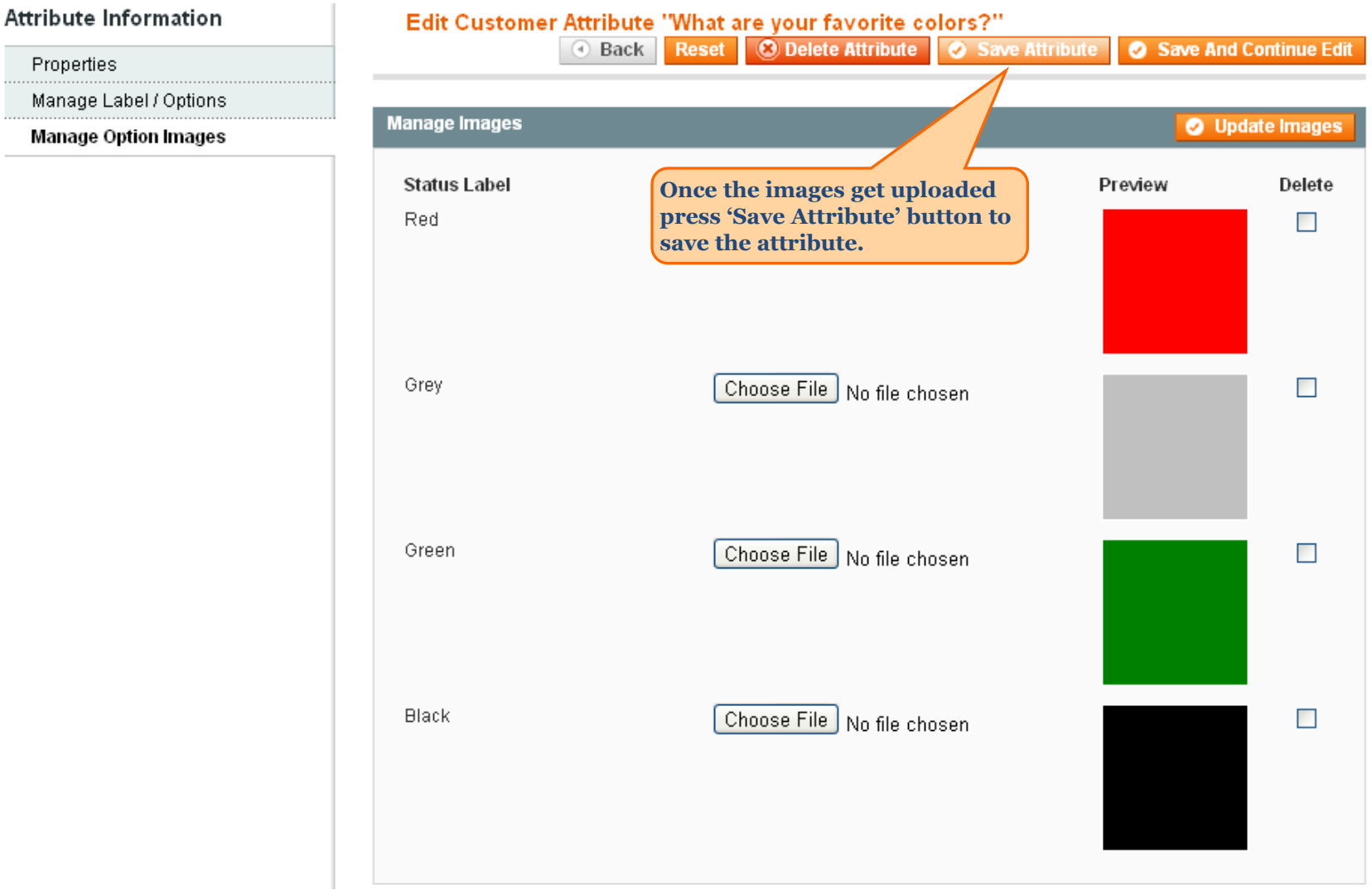
2. Types of attributes which support images

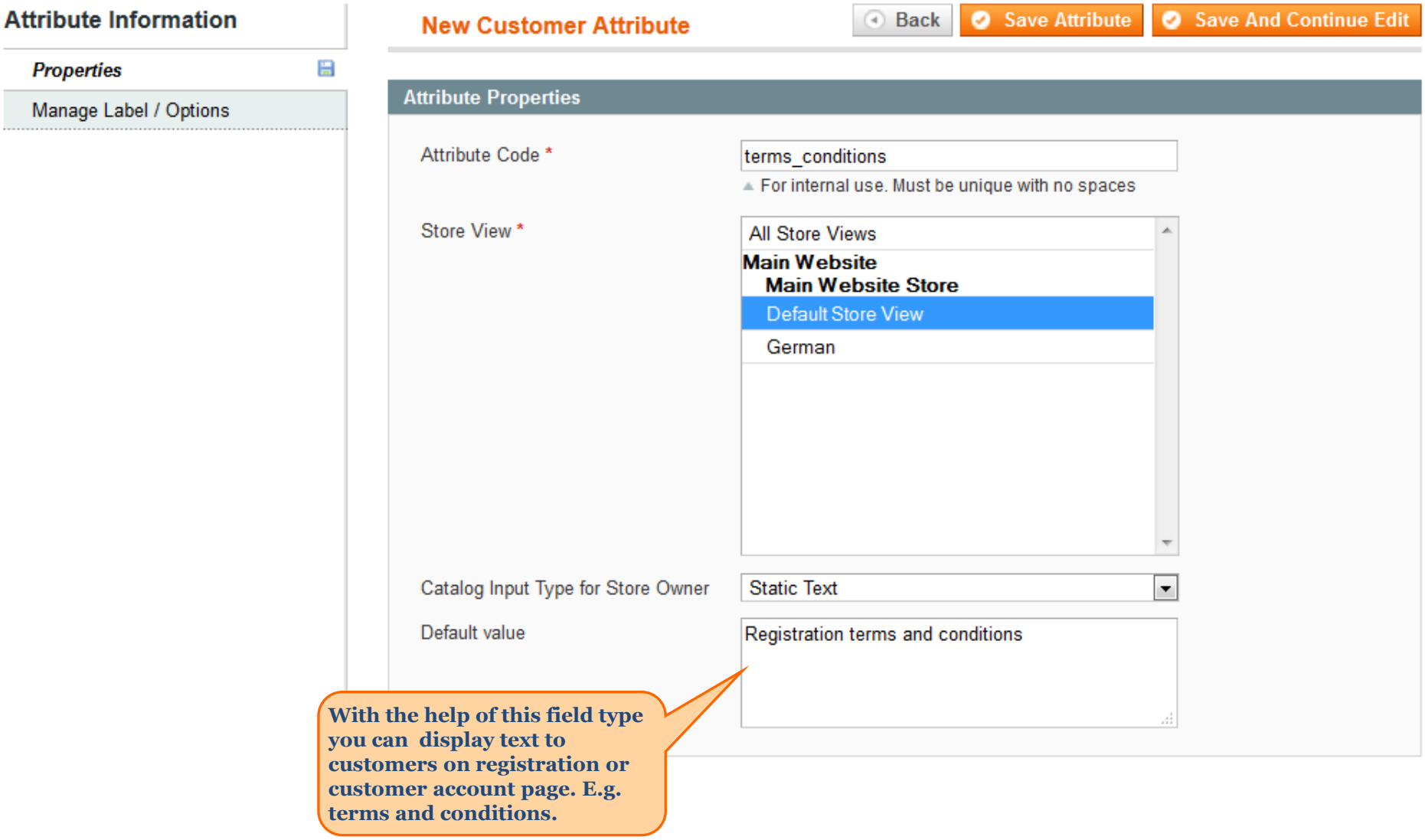


Please go to 'Manage Option Images' tab to upload images for the options. If would like to create checkbox attribute or radio button attribute without images, do not upload the images.

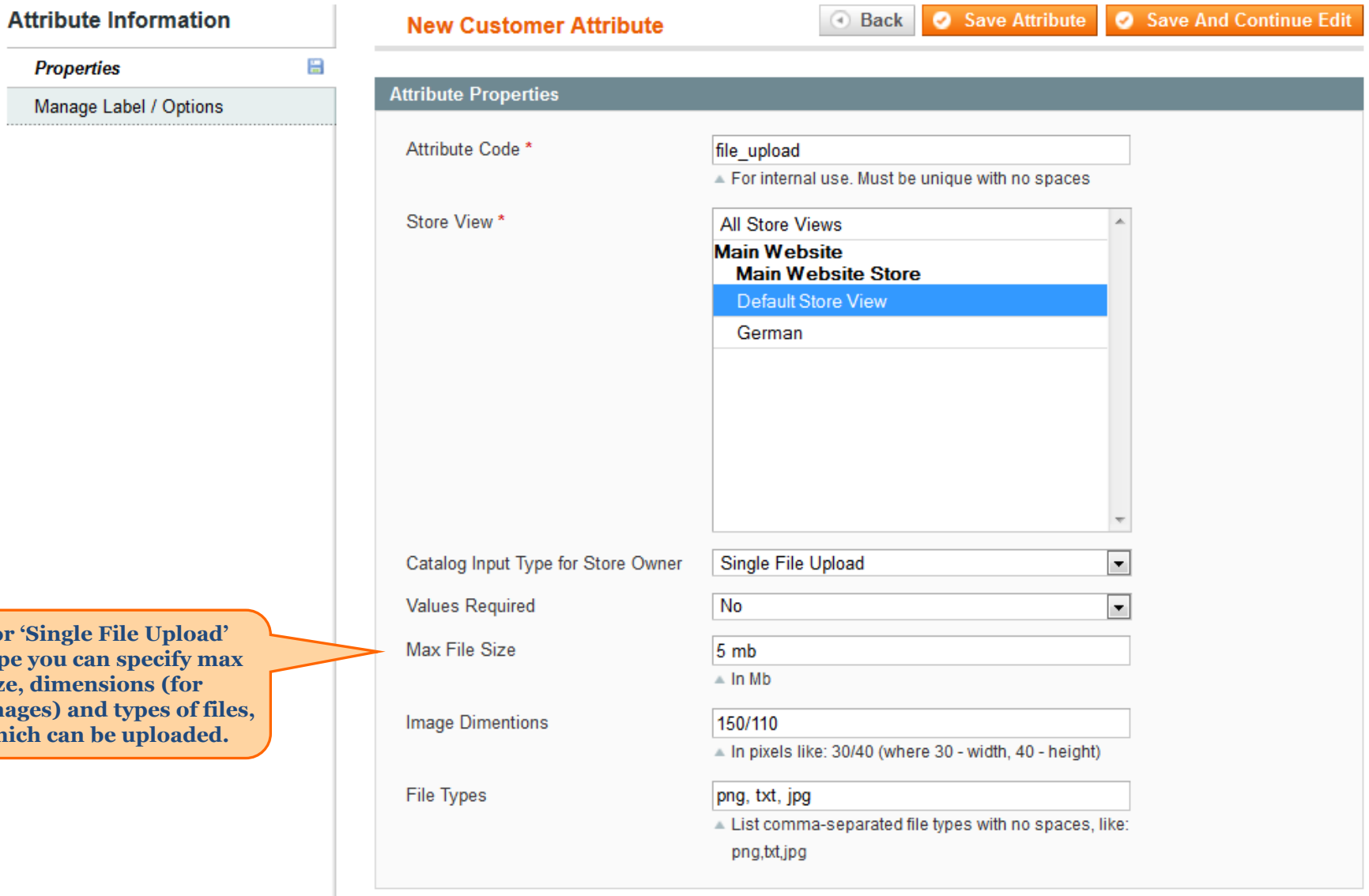
After you've chosen images for all the options, please press 'Update Images' button, otherwise the images will not get uploaded.

2. Types of attributes which support images



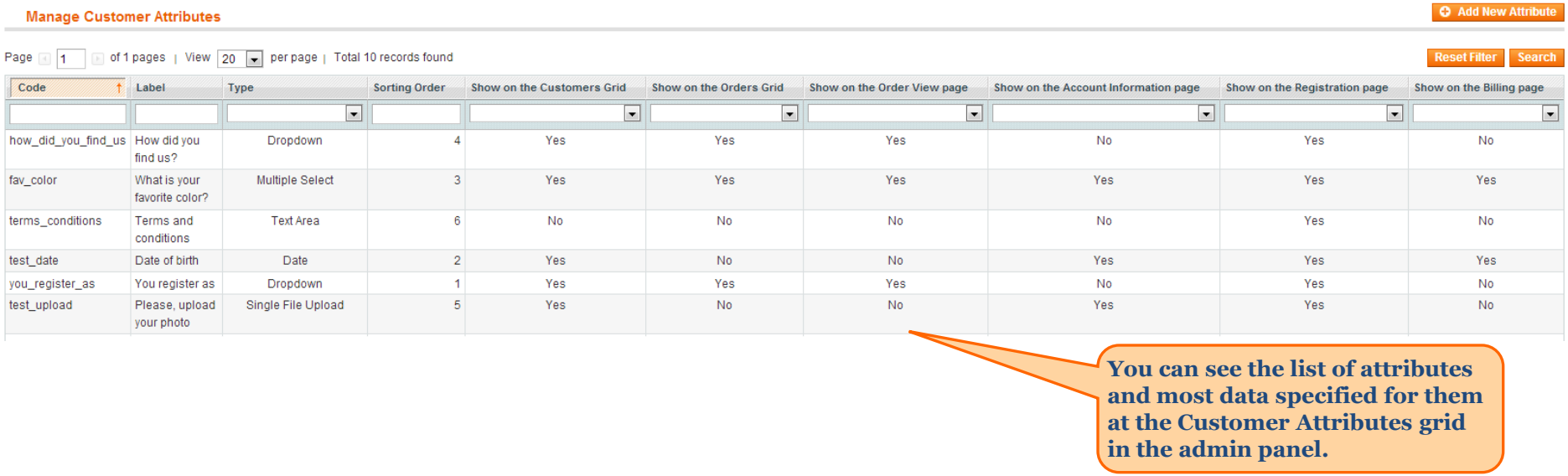

Attribute Information
Properties
Manage Label / Options
New Customer Attribute
Back
Save Attribute
Save And Continue Edit
Attribute Properties
Attribute Code *
terms_conditions
For internal use. Must be unique with no spaces
Store View *
All Store Views
Main Website
Main Website Store
Default Store View
German
Catalog Input Type for Store Owner
Static Text
Default value
Registration terms and conditions
With the help of this field type you can display text to customers on registration or customer account page. E.g. terms and conditions.

4. Single File Upload Attributes

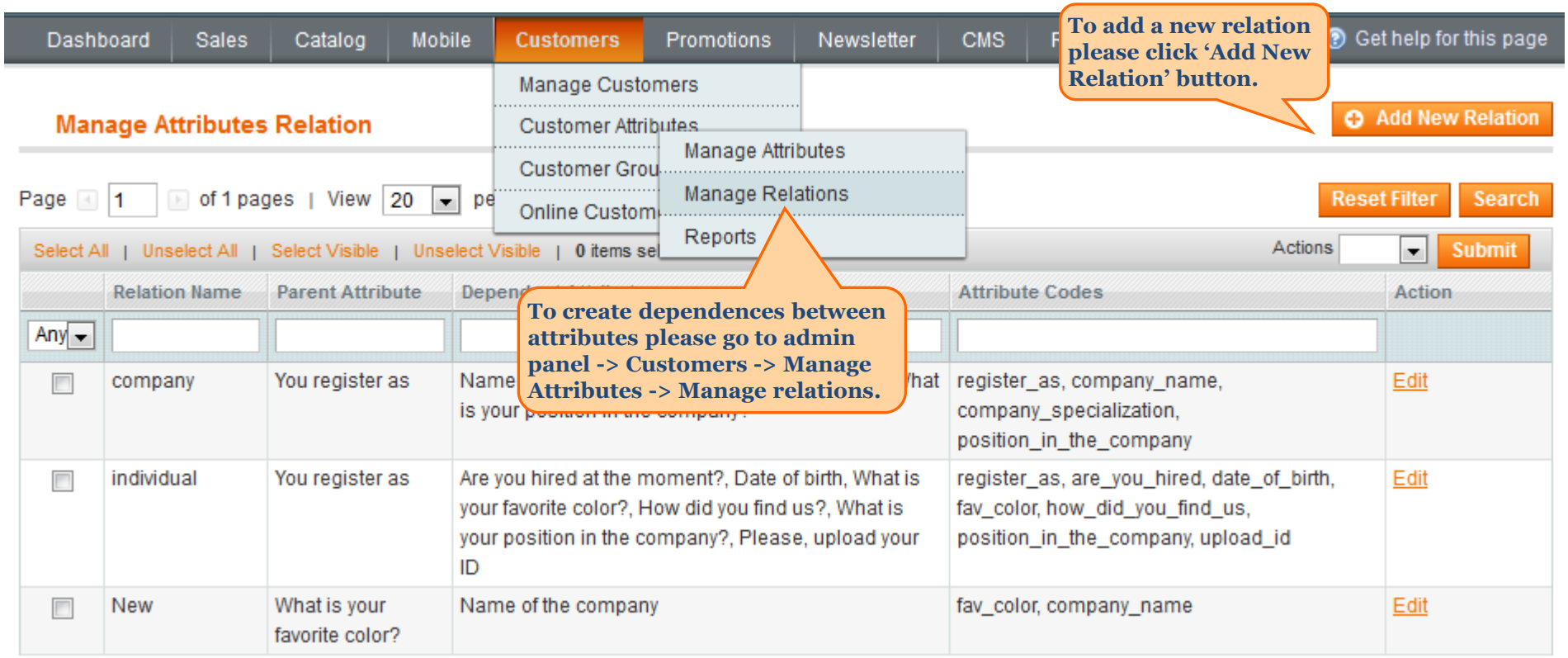


For 'Single File Upload' type you can specify max size, dimensions (for images) and types of files, which can be uploaded.

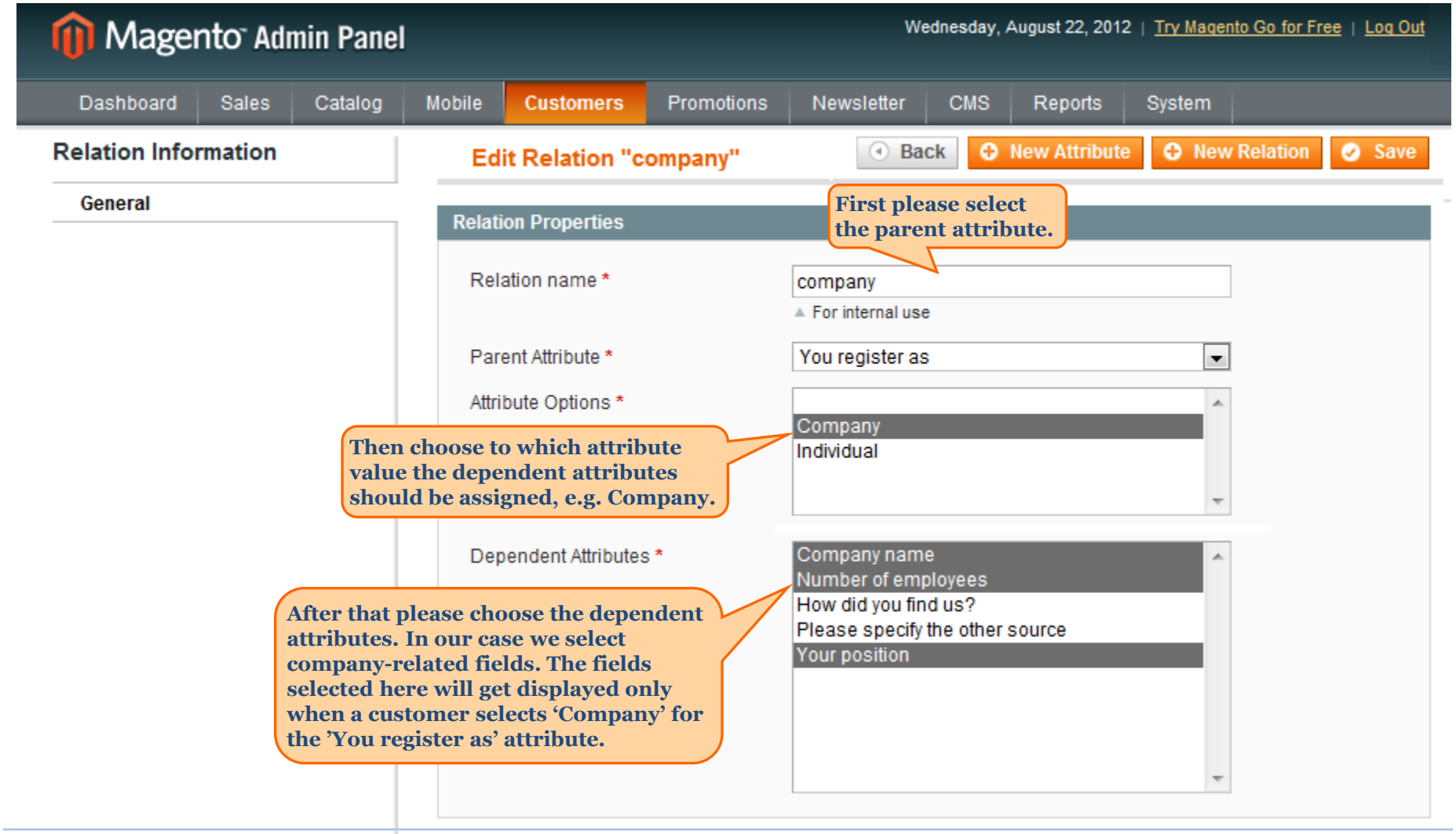
5. Customer attributes grid

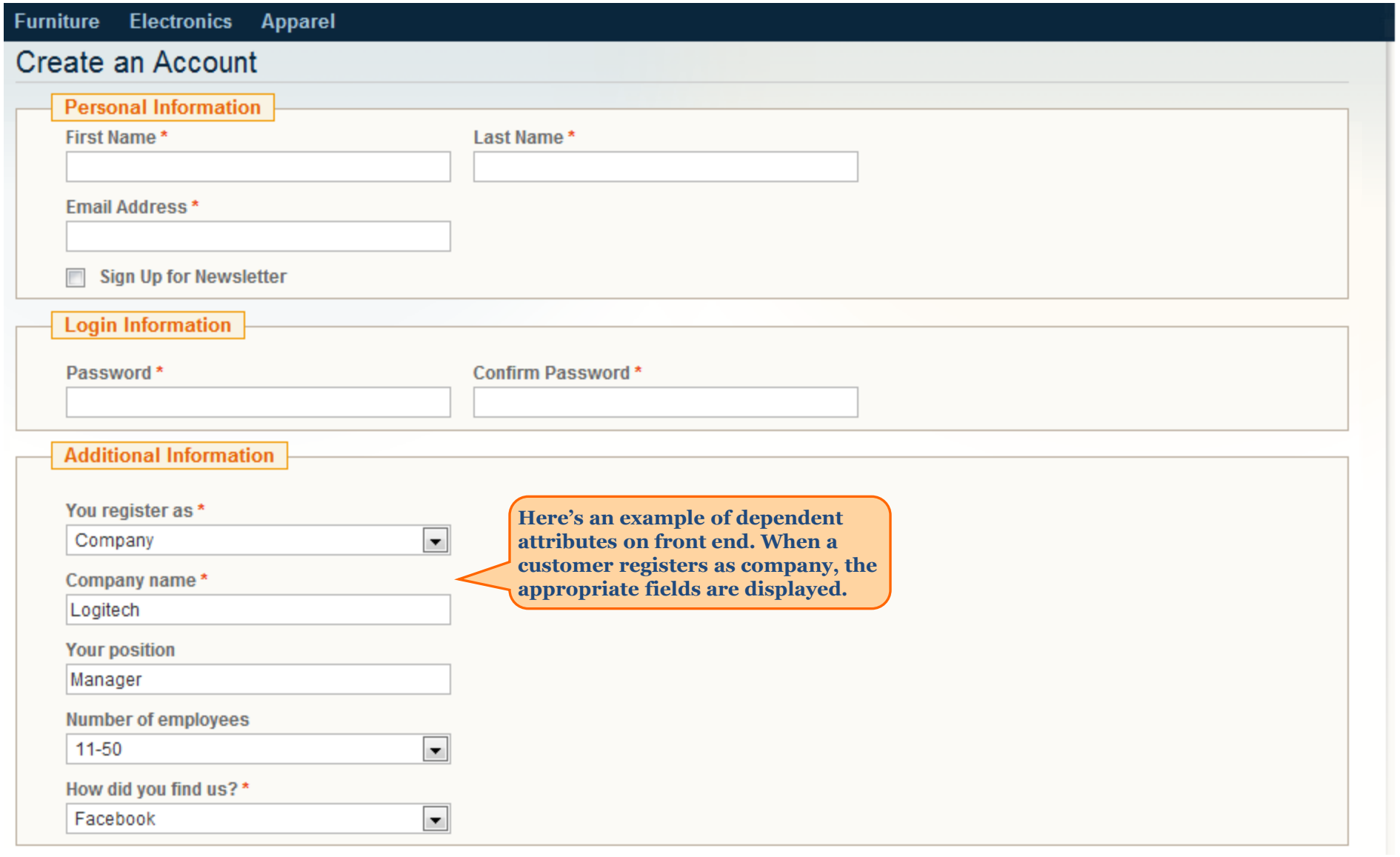


You can see the list of attributes and most data specified for them at the Customer Attributes grid in the admin panel.



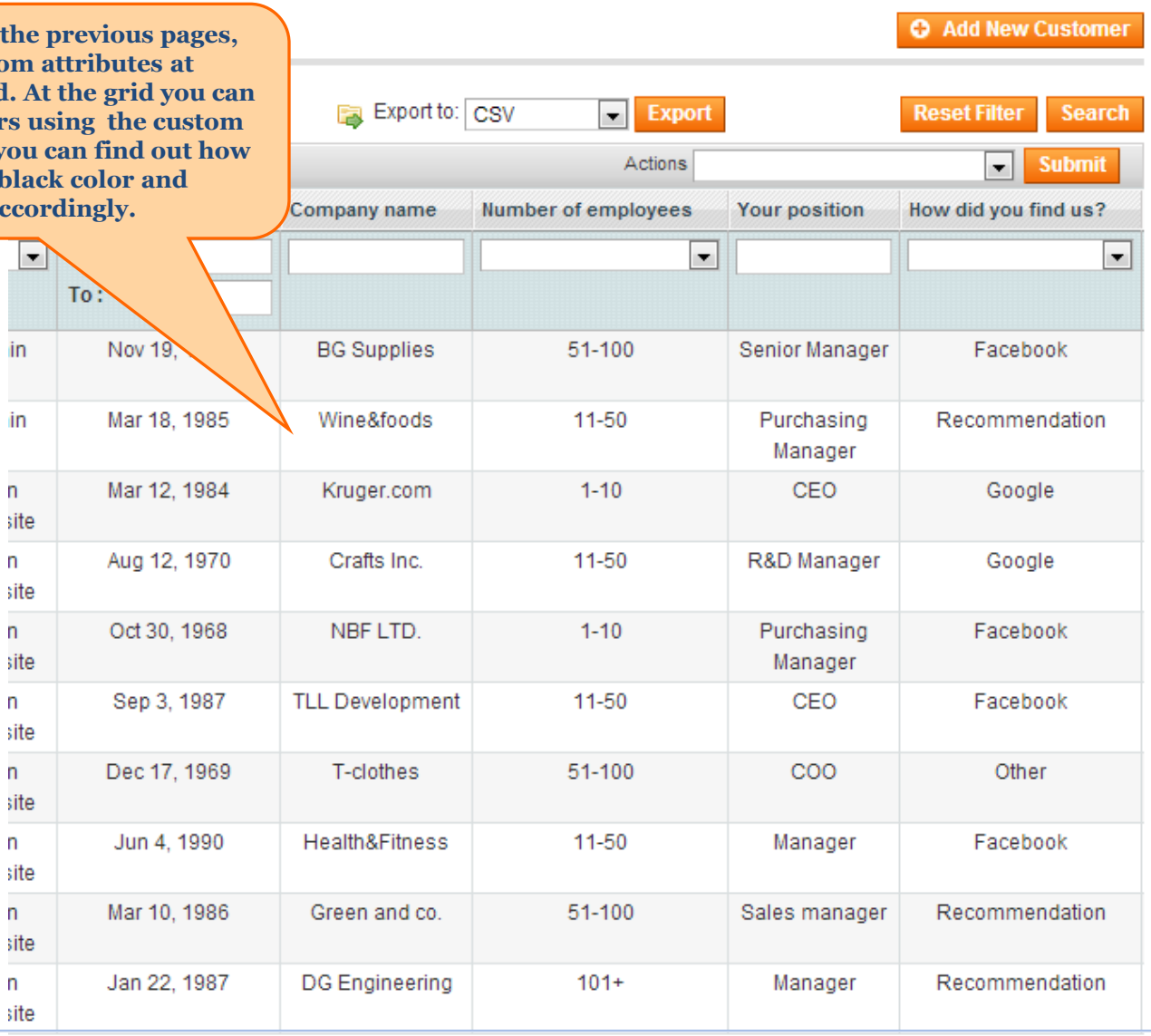
	Relation Name	Parent Attribute	Depend	Attribute Codes	Action
Any					
☐	company	You register as	Name … is your position in the company?	register_as, company_name, company_specialization, position_in_the_company	Edit
☐	individual	You register as	Are you hired at the moment?, Date of birth, What is your favorite color?, How did you find us?, What is your position in the company?, Please, upload your ID	register_as, are_you_hired, date_of_birth, fav_color, how_did_you_find_us, position_in_the_company, upload_id	Edit
☐	New	What is your favorite color?	Name of the company	fav_color, company_name	Edit


Magento Admin Panel
Wednesday, August 22, 2012 | Try Magento Go for Free | Log Out
Dashboard
Sales
Catalog
Mobile
Customers
Promotions
Newsletter
CMS
Reports
System
Relation Information
General
Edit Relation "company"
Back
New Attribute
New Relation
Save
Relation Properties
First please select the parent attribute.
Relation name *
company
For internal use
Parent Attribute *
You register as
Attribute Options *
Company
Individual
Then choose to which attribute value the dependent attributes should be assigned, e.g. Company.
Dependent Attributes *
Company name
Number of employees
How did you find us?
Please specify the other source
Your position
After that please choose the dependent attributes. In our case we select company-related fields. The fields selected here will get displayed only when a customer selects 'Company' for the 'You register as' attribute.


Furniture
Electronics
Apparel
Create an Account
Personal Information
First Name *
Last Name *
Email Address *
Sign Up for Newsletter
Login Information
Password *
Confirm Password *
Additional Information
You register as *
Company
Company name *
Logitech
Your position
Manager
Number of employees
11-50
How did you find us? *
Facebook
Here's an example of dependent attributes on front end. When a customer registers as company, the appropriate fields are displayed.

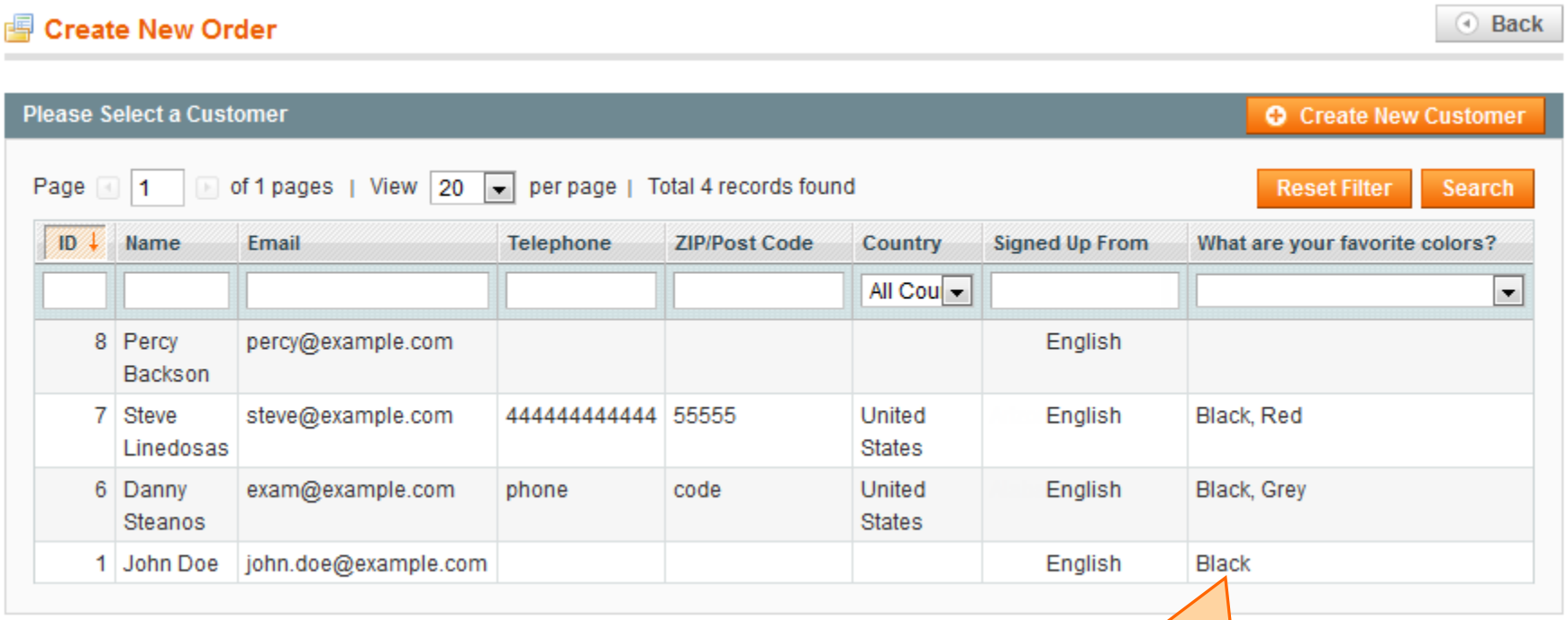
7. Customer attributes on 'Manage Customers' grid

As mentioned on one of the previous pages, you can display the custom attributes at 'Manage Customers' grid. At the grid you can filter the list of customers using the custom attributes, for example you can find out how many customers prefer black color and update your inventory accordingly.



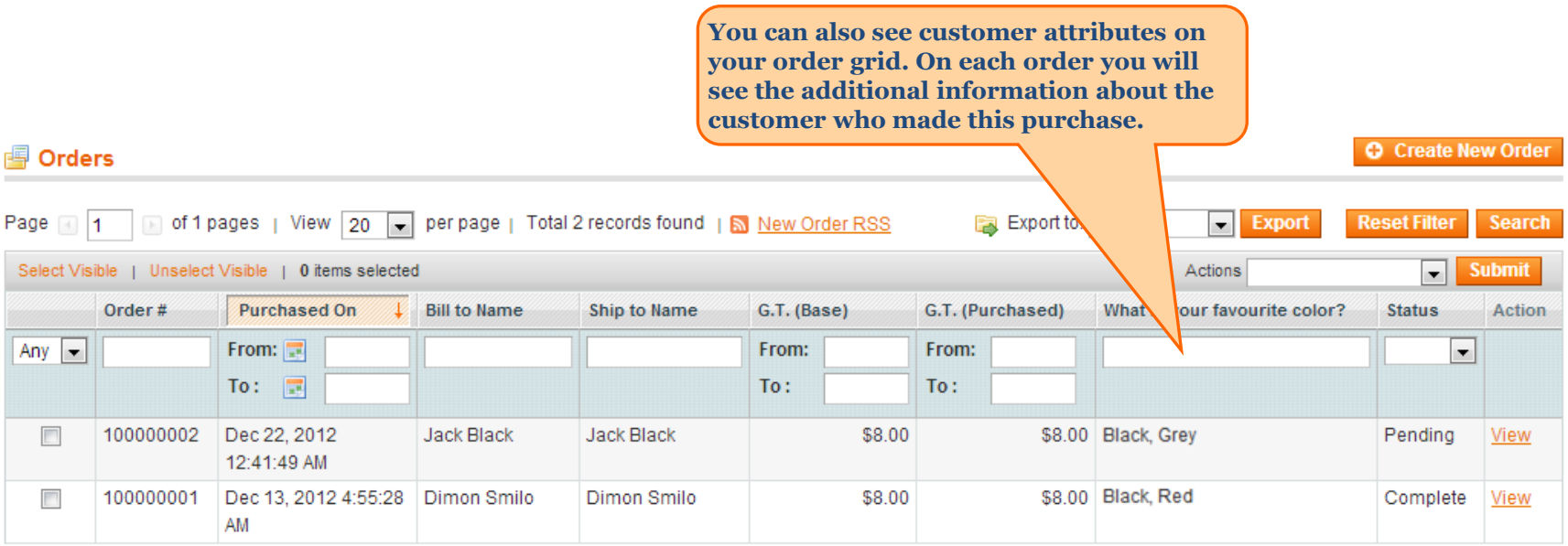
		Company name	Number of employees	Your position	How did you find us?
in	Nov 19,	BG Supplies	51-100	Senior Manager	Facebook
in	Mar 18, 1985	Wine&foods	11-50	Purchasing Manager	Recommendation
n site	Mar 12, 1984	Kruger.com	1-10	CEO	Google
n site	Aug 12, 1970	Crafts Inc.	11-50	R&D Manager	Google
n site	Oct 30, 1968	NBF LTD.	1-10	Purchasing Manager	Facebook
n site	Sep 3, 1987	TLL Development	11-50	CEO	Facebook
n site	Dec 17, 1969	T-clothes	51-100	COO	Other
n site	Jun 4, 1990	Health&Fitness	11-50	Manager	Facebook
n site	Mar 10, 1986	Green and co.	51-100	Sales manager	Recommendation
n site	Jan 22, 1987	DG Engineering	101+	Manager	Recommendation

8. Attributes on the list of customers for admin orders

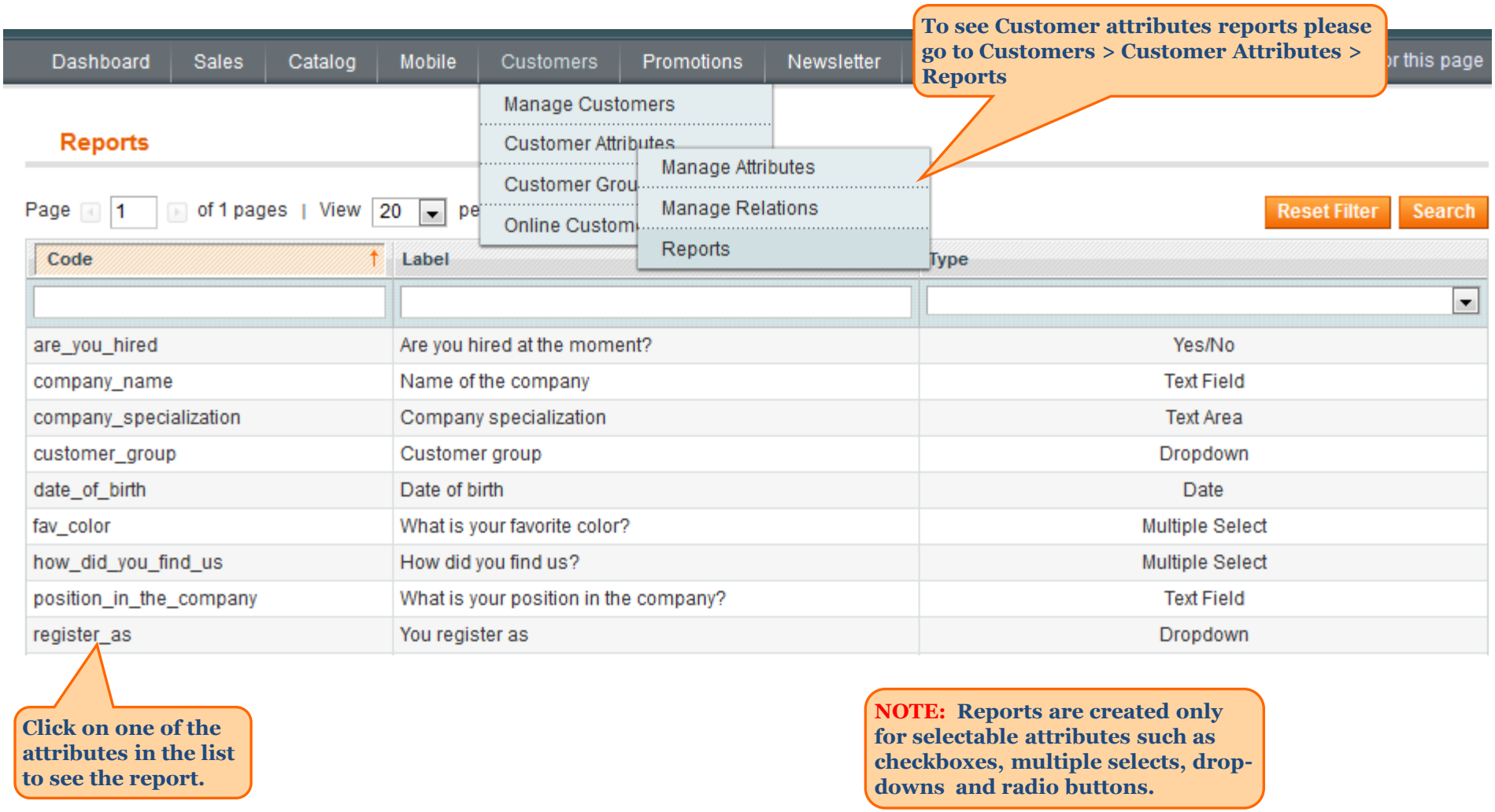


Also the attributes, which are set to be displayed on 'Manage Customers' grid, are shown on the list of customers, when you create orders from admin panel.

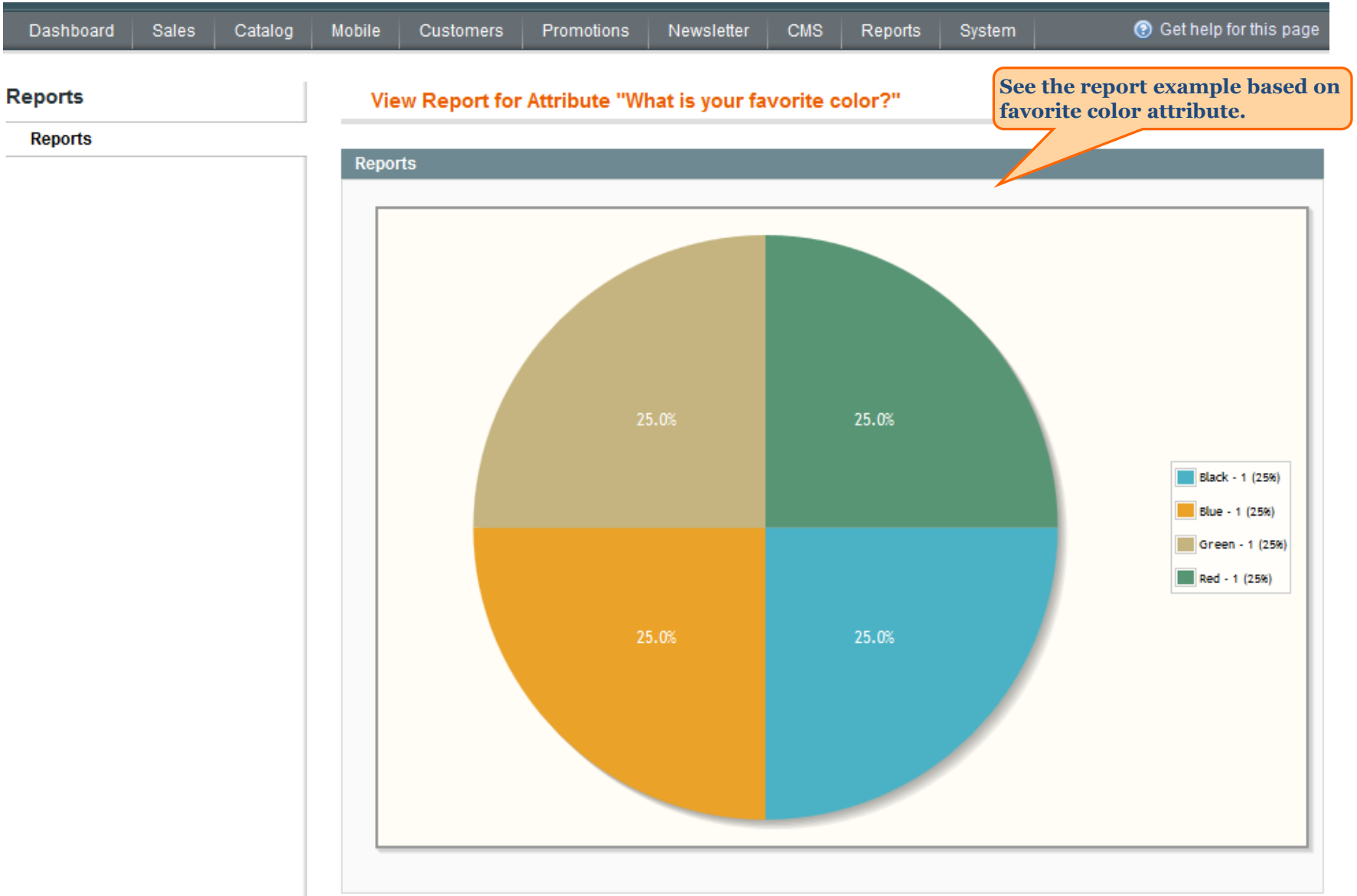
9. Customer attributes on order grid



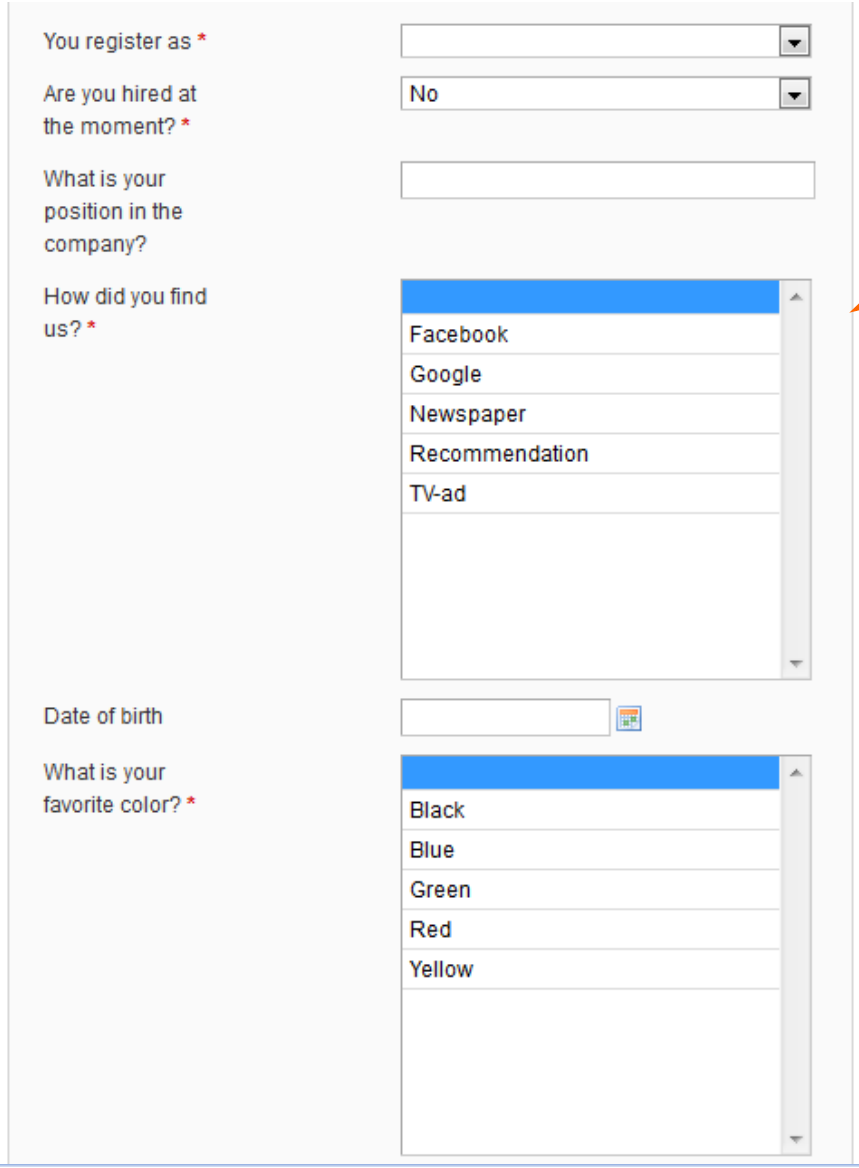
10. Customer attributes: Reports



10. Customer attributes: Reports



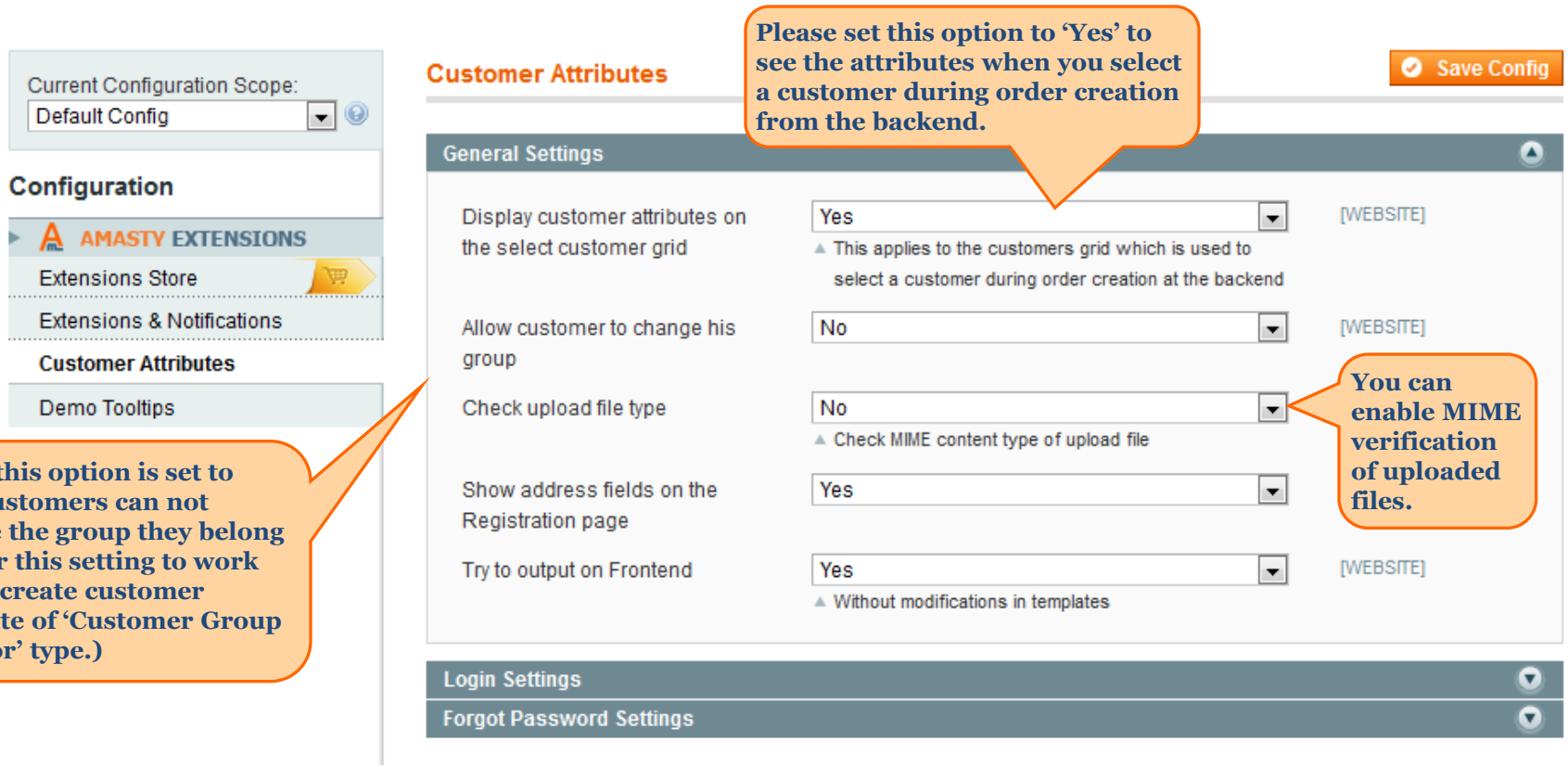
11. Customer attributes for backend orders



You can specify customer attributes when creating a customer for orders placed from the admin panel. It's also possible to add/edit customer attributes for already created orders.

12. General extension settings

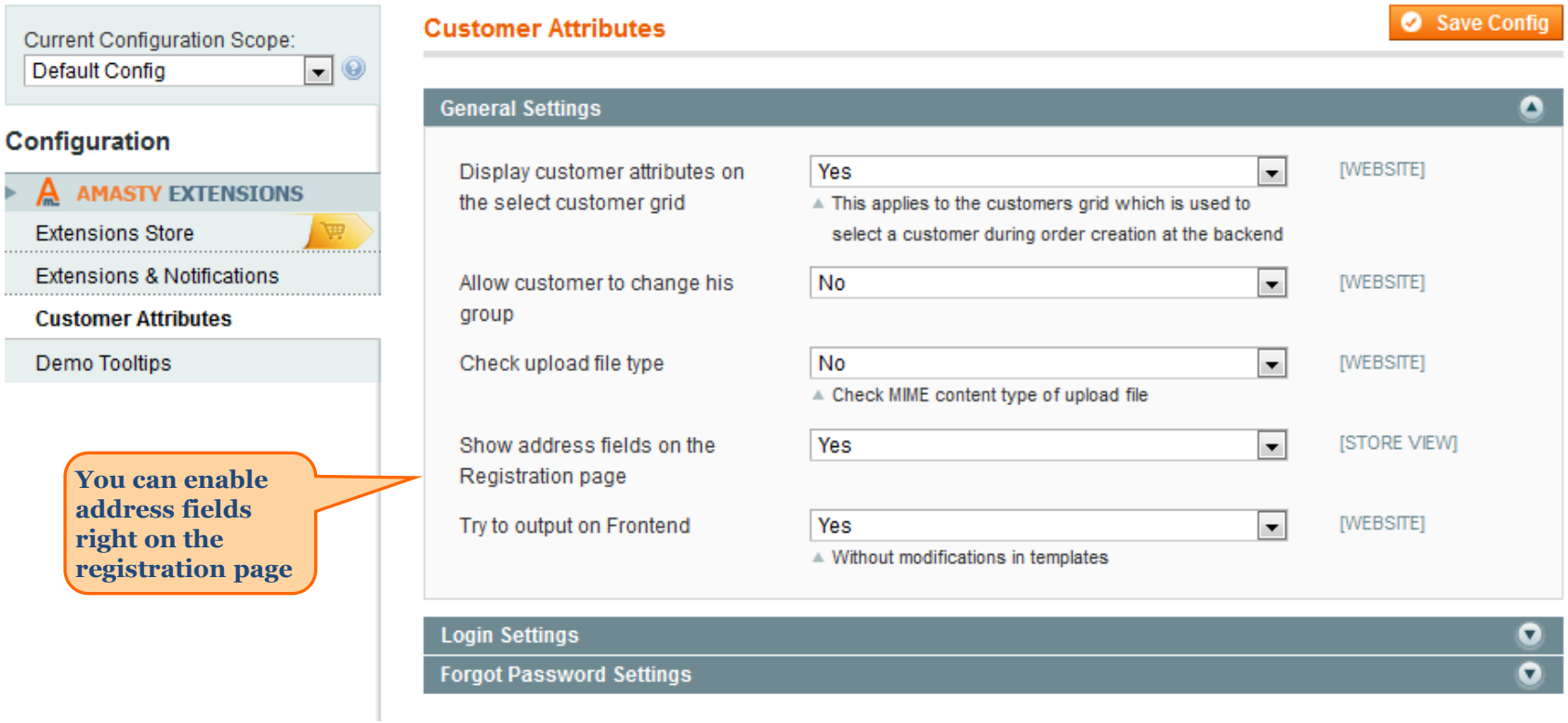
Please go to admin panel -> System -> Configuration – Customer Attributes to manage general extension settings.

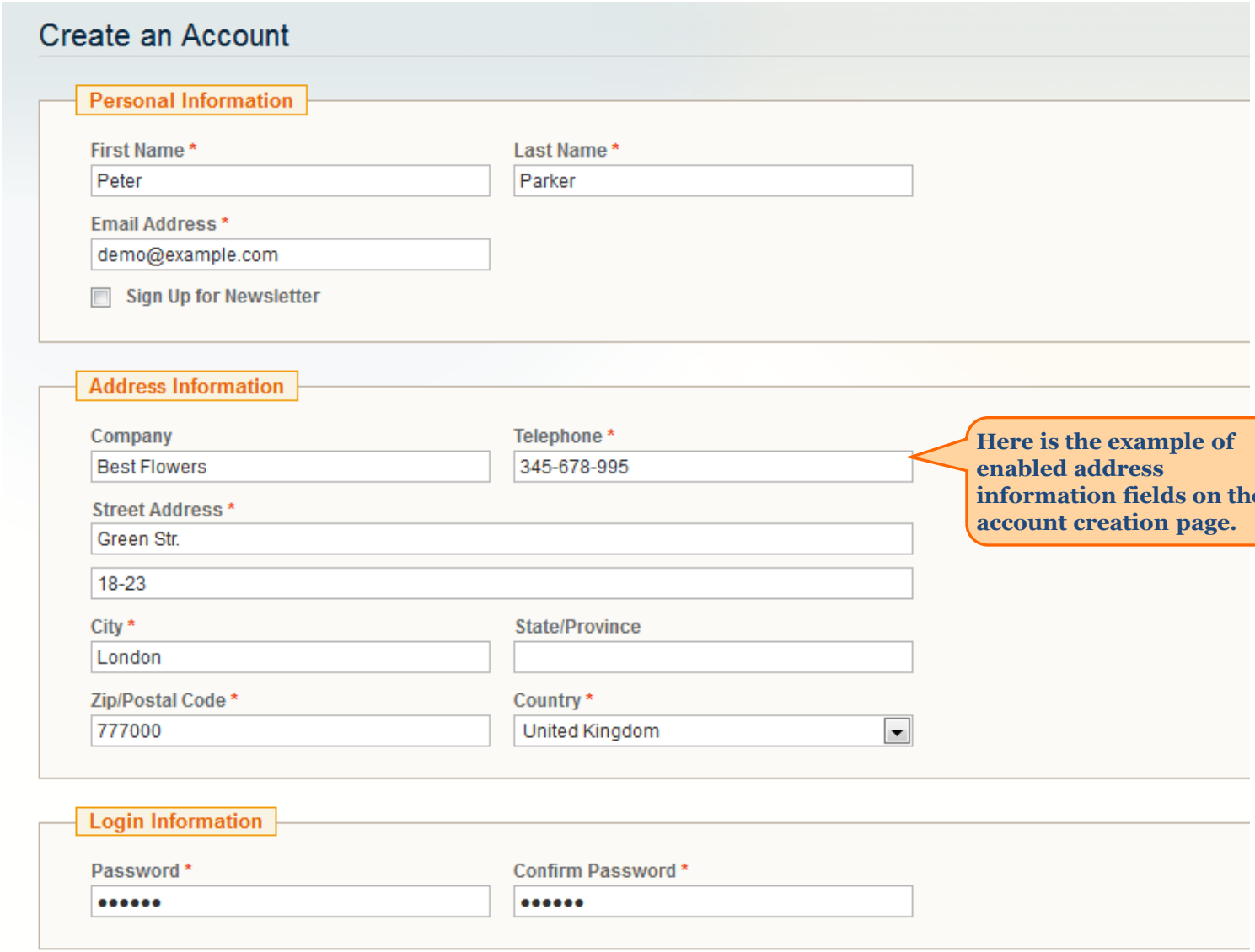


Please set this option to 'Yes' to see the attributes when you select a customer during order creation from the backend.

When this option is set to 'No', customers can not change the group they belong to. (For this setting to work please create customer attribute of 'Customer Group Selector' type.)

You can enable MIME verification of uploaded files.

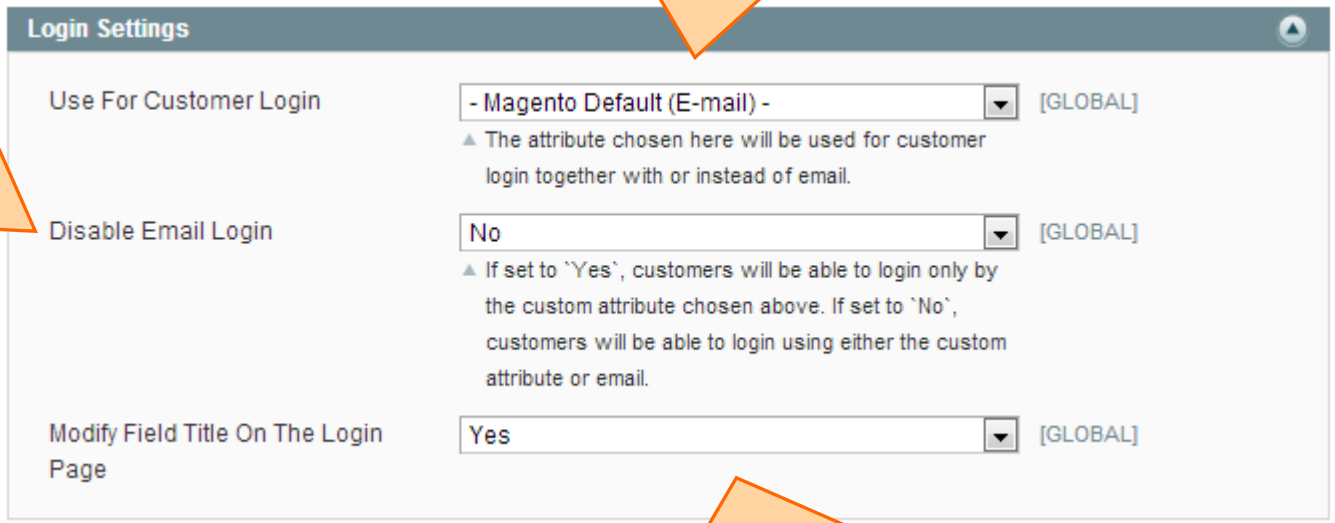

Current Configuration Scope:
Default Config
Configuration
AMASTY EXTENSIONS
Extensions Store
Extensions & Notifications
Customer Attributes
Demo Tooltips
You can enable address fields right on the registration page
Customer Attributes
Save Config
General Settings
Display customer attributes on the select customer grid
Yes
This applies to the customers grid which is used to select a customer during order creation at the backend
[WEBSITE]
Allow customer to change his group
No
[WEBSITE]
Check upload file type
No
Check MIME content type of upload file
[WEBSITE]
Show address fields on the Registration page
Yes
[STORE VIEW]
Try to output on Frontend
Yes
Without modifications in templates
[WEBSITE]
Login Settings
Forgot Password Settings


Create an Account
Personal Information
First Name *
Peter
Last Name *
Parker
Email Address *
demo@example.com
Sign Up for Newsletter
Address Information
Company
Best Flowers
Telephone *
345-678-995
Street Address *
Green Str.
18-23
City *
London
State/Province
Zip/Postal Code *
777000
Country *
United Kingdom
Login Information
Password *
Confirm Password *
Here is the example of enabled address information fields on the account creation page.

13. Attribute instead or together with email for login

If you would like to let your customers use a custom attribute for login instead or together with email, please go to admin panel -> System -> Configuration – Customer Attributes. Please make sure that 'Unique Value' option of the custom attribute is set to 'Yes'.

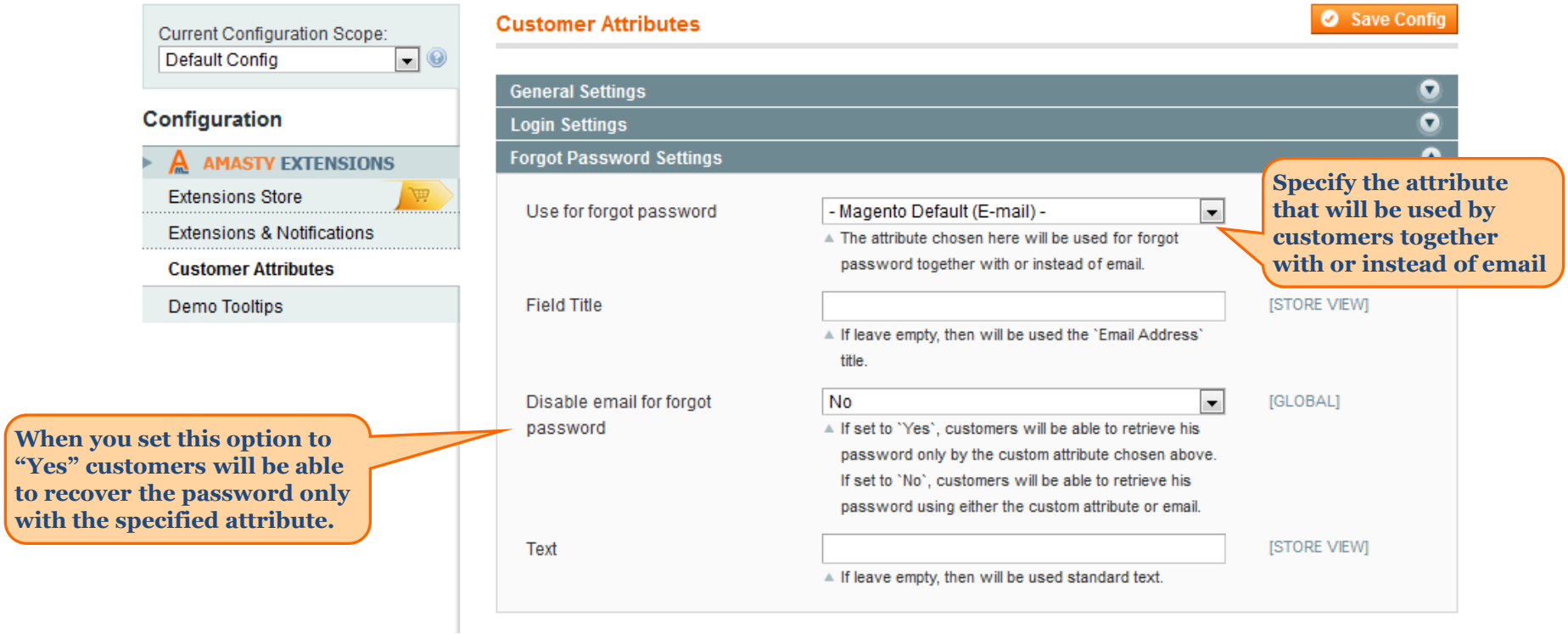
With the help of 'Use for Customer Login' setting you can choose which attribute to use for login



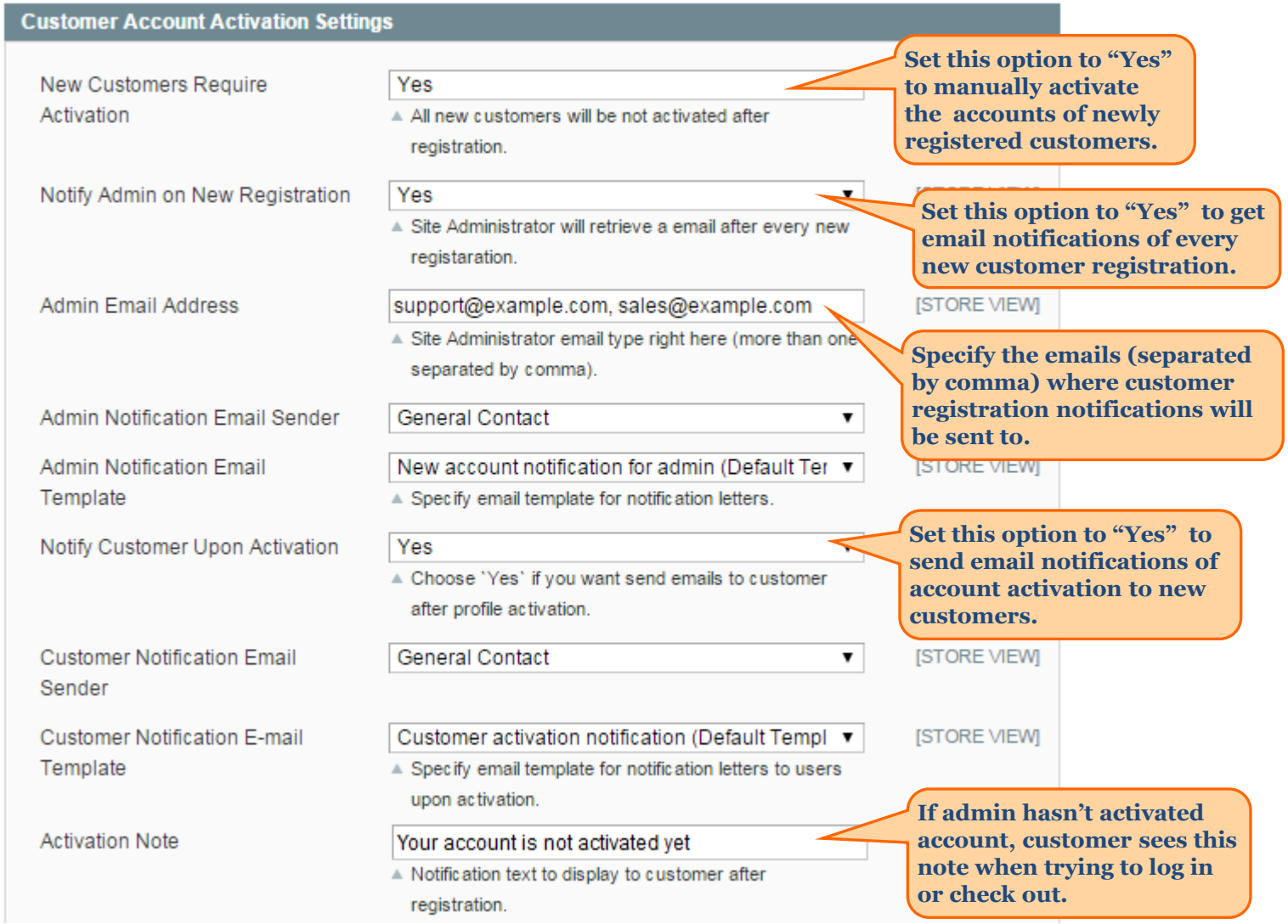
If you would like to use only the custom attribute for login (not in parallel with email), please set 'Disable Email Login' option to 'Yes'. If you set it to 'No' customers will be able to login using either email or the custom attribute value (in combination with password of course).

If you set 'Modify Field Title On The Login Page' option to 'Yes', label of the login field would say Email Address/'Label of the attribute you choose', otherwise the label of the login field would be Email Address.

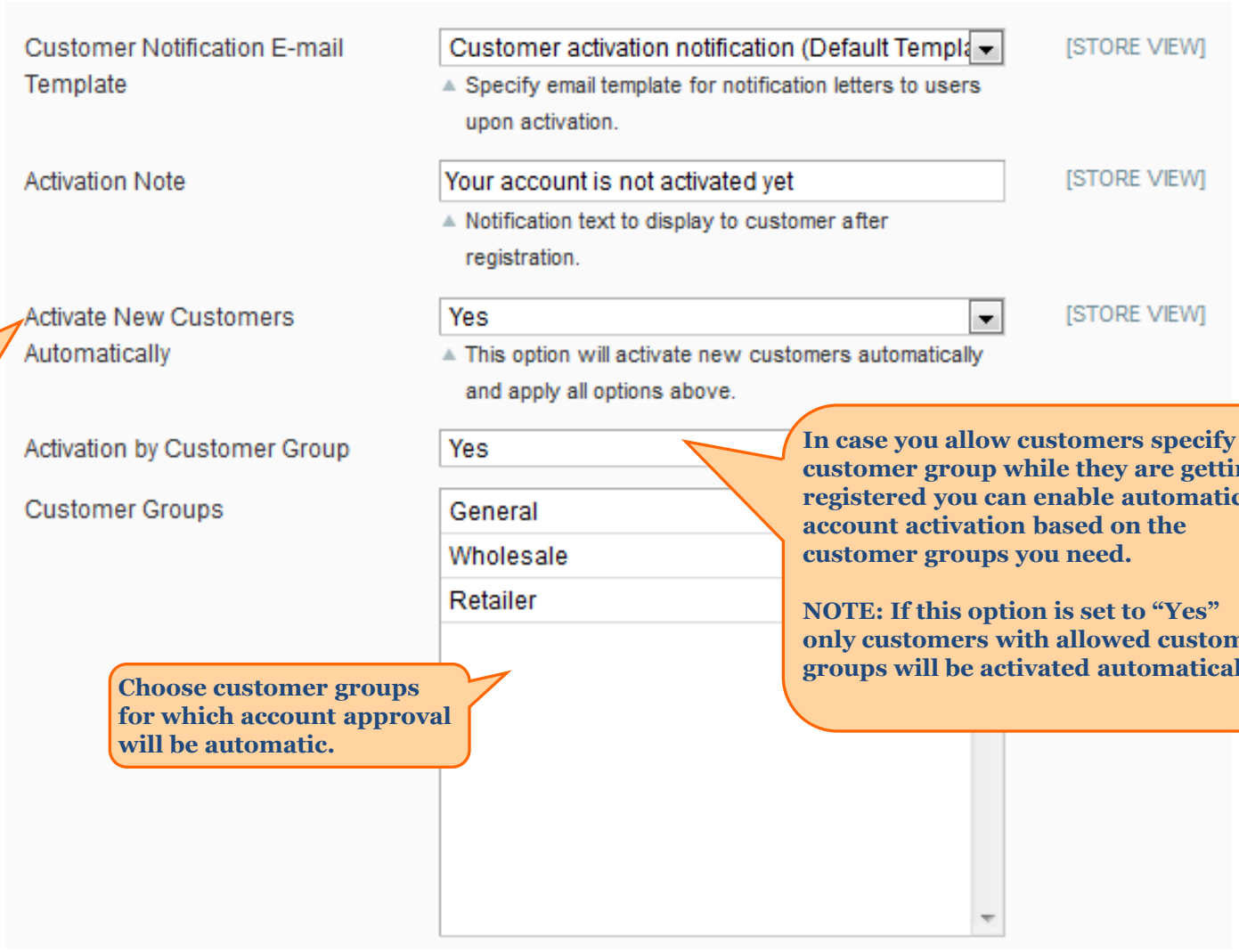
14. Forgot Password Settings



15. Customer Account Activation Settings



15. Customer Account Activation Settings



Set this option to "Yes" if you want to activate customer accounts automatically.

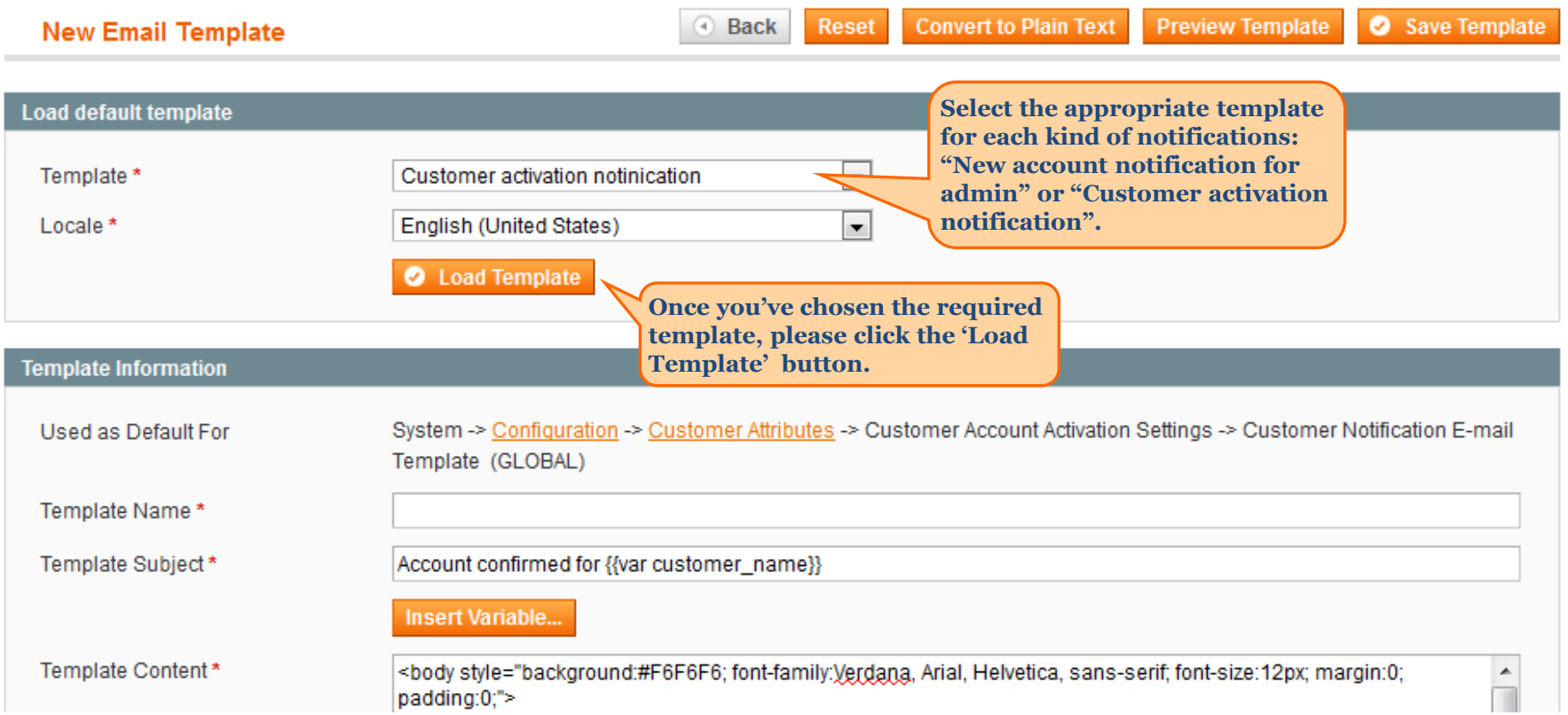
In case you allow customers specify customer group while they are getting registered you can enable automatic account activation based on the customer groups you need.

NOTE: If this option is set to "Yes" only customers with allowed customer groups will be activated automatically.

Choose customer groups for which account approval will be automatic.

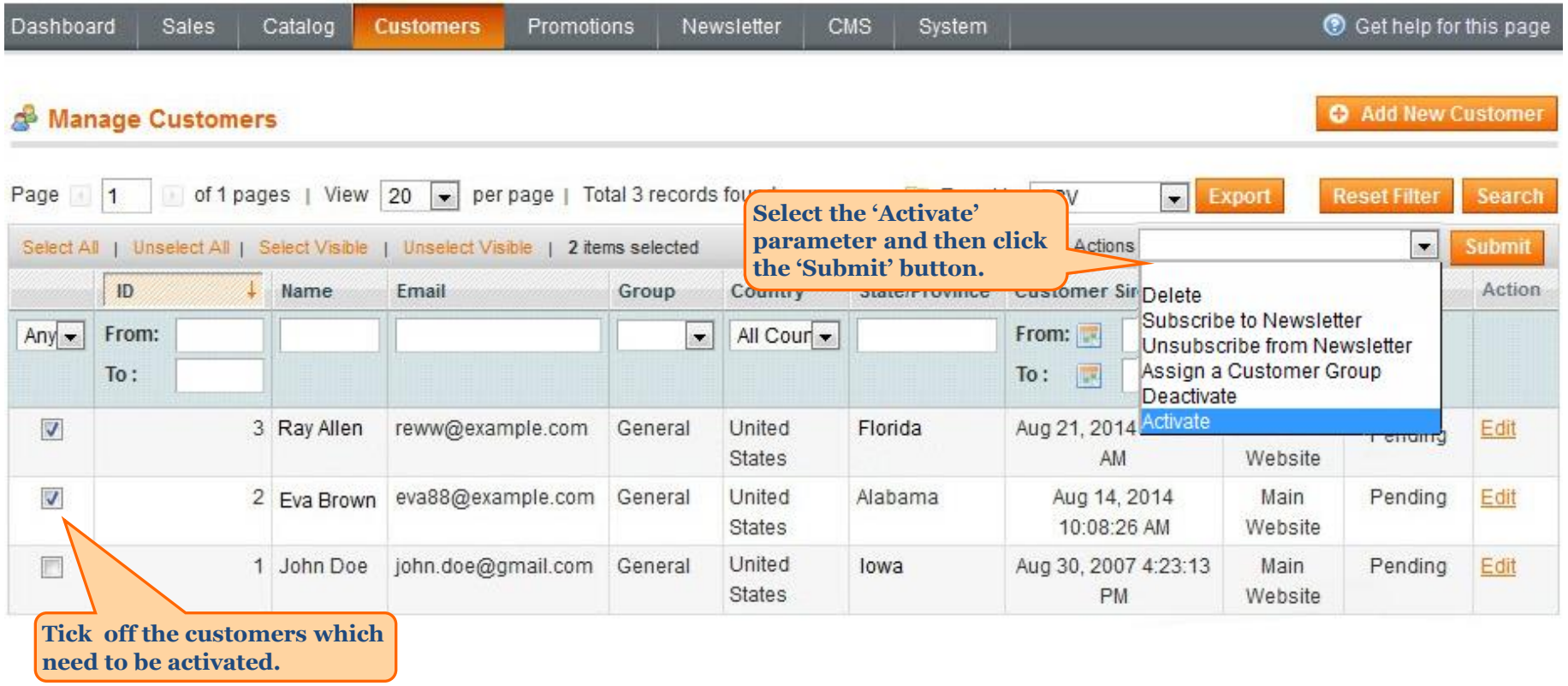
15. Customer Account Activation Settings

As soon as you've set up email notifications for admin and customers, go to
System > Transactional Emails
and click the 'Add New Template' button.



16. Customer Account Activation

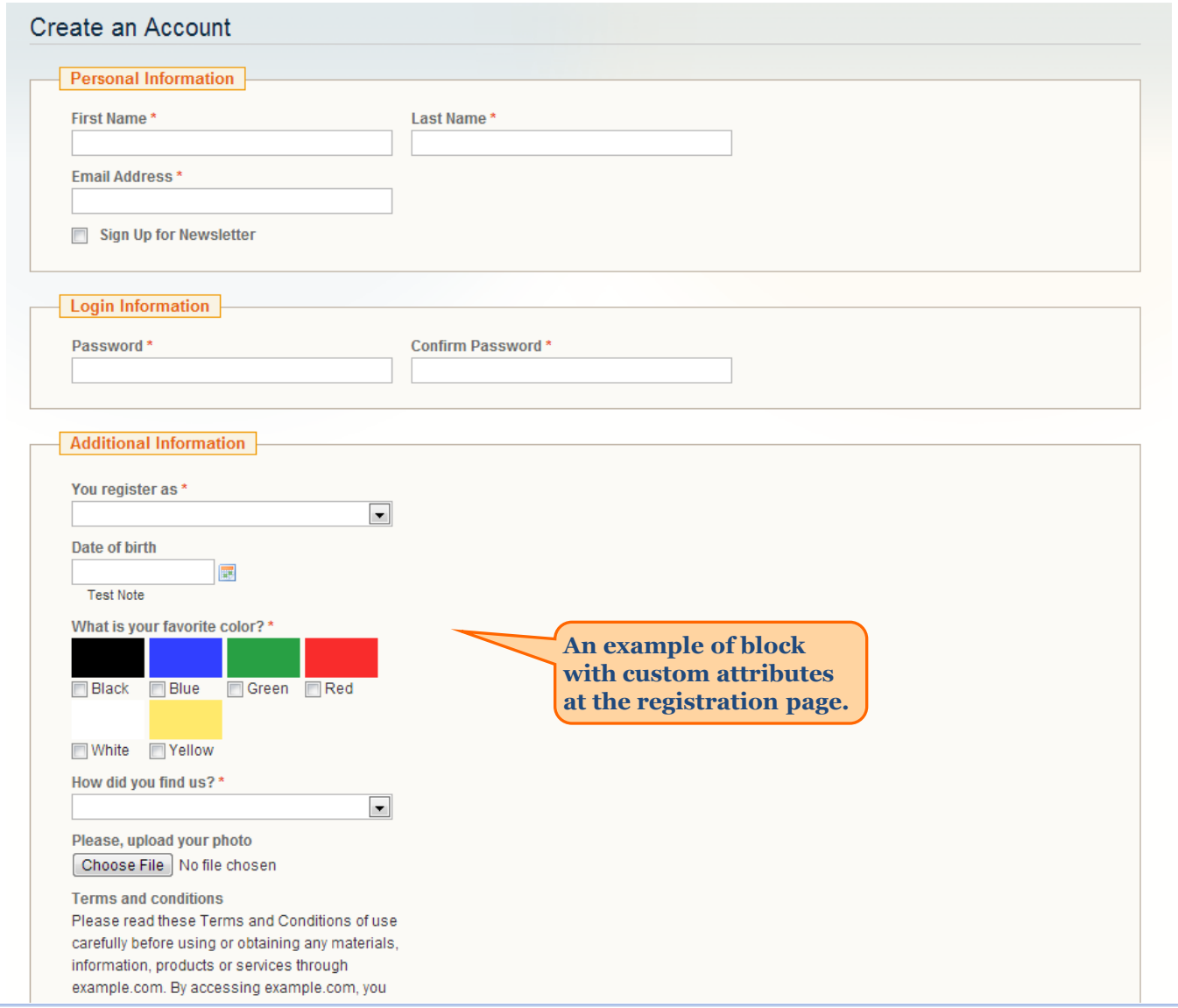
To manually activate customers' accounts, please open:
Admin panel>Customers>Manage Customers.



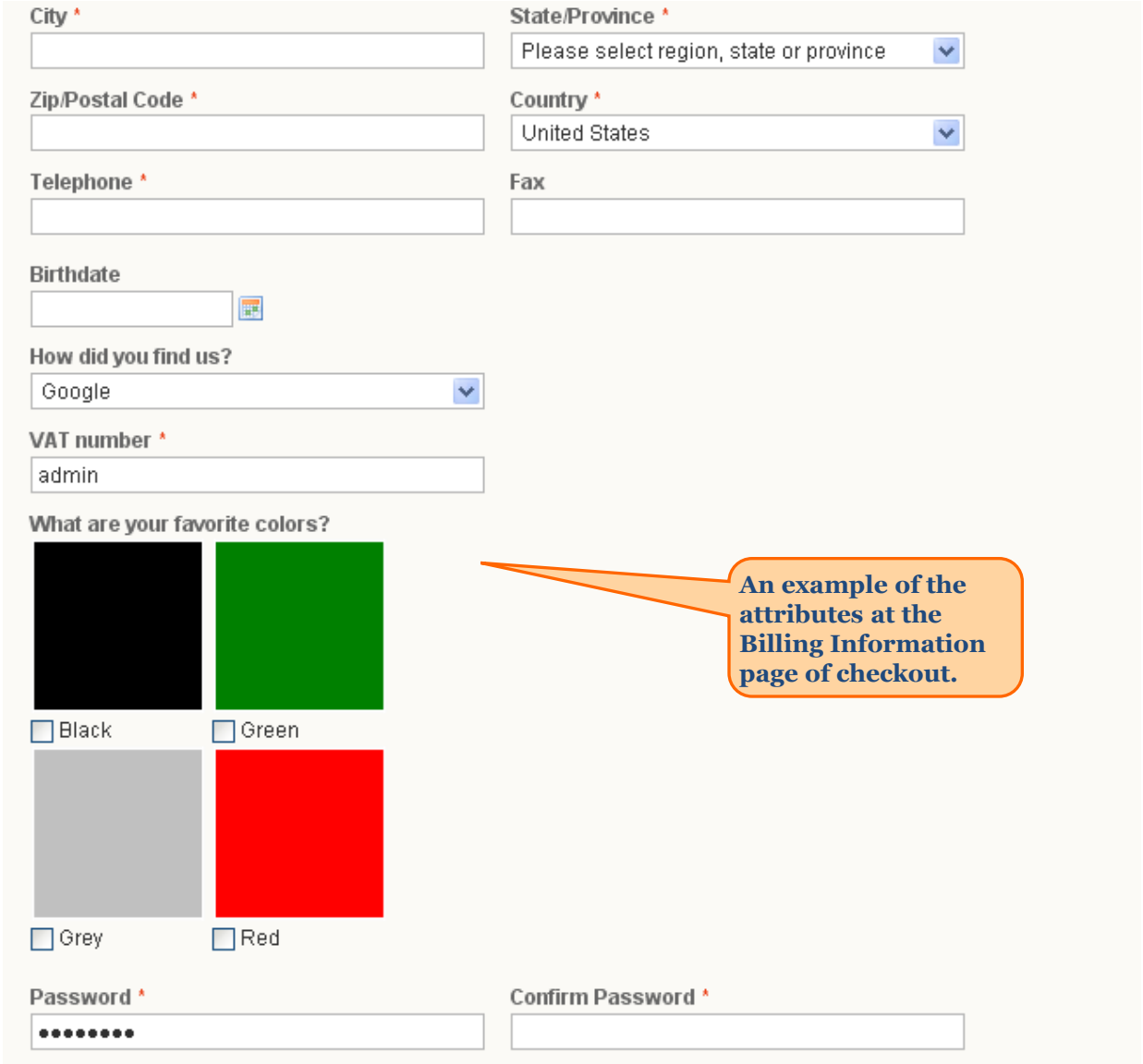
Select the 'Activate' parameter and then click the 'Submit' button.

Tick off the customers which need to be activated.

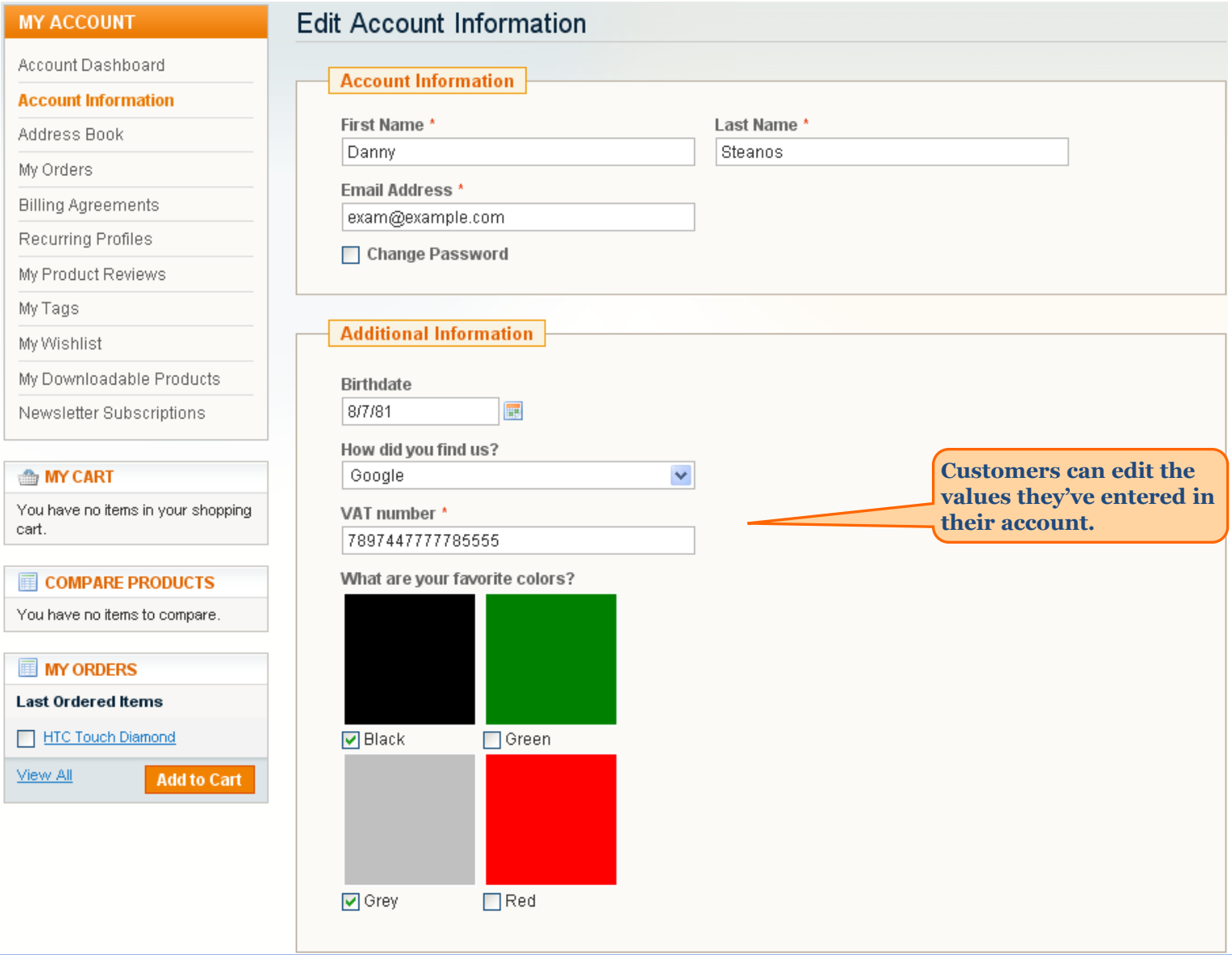
17. Customer attributes on registration page



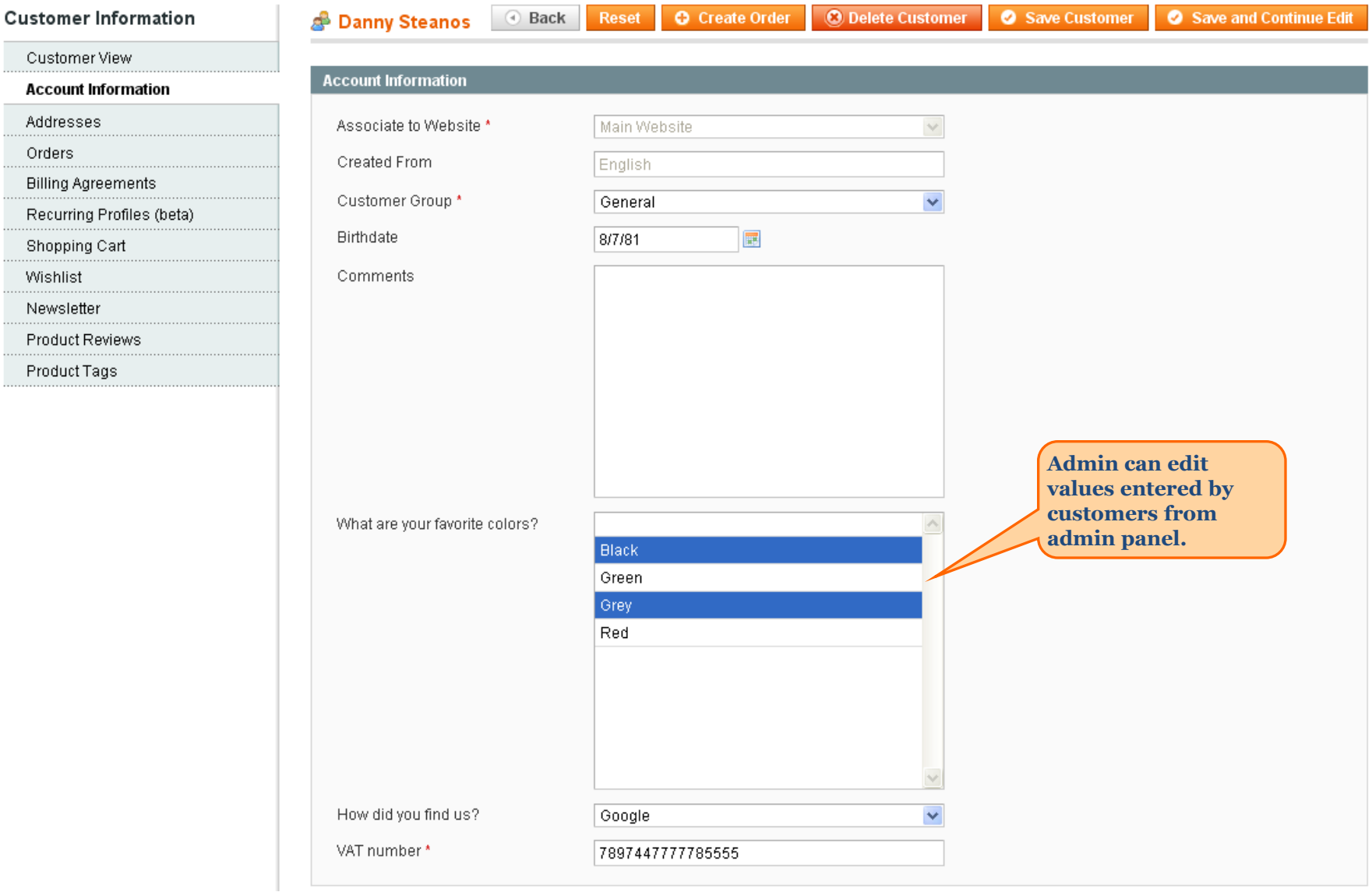
18. Attributes on billing information page



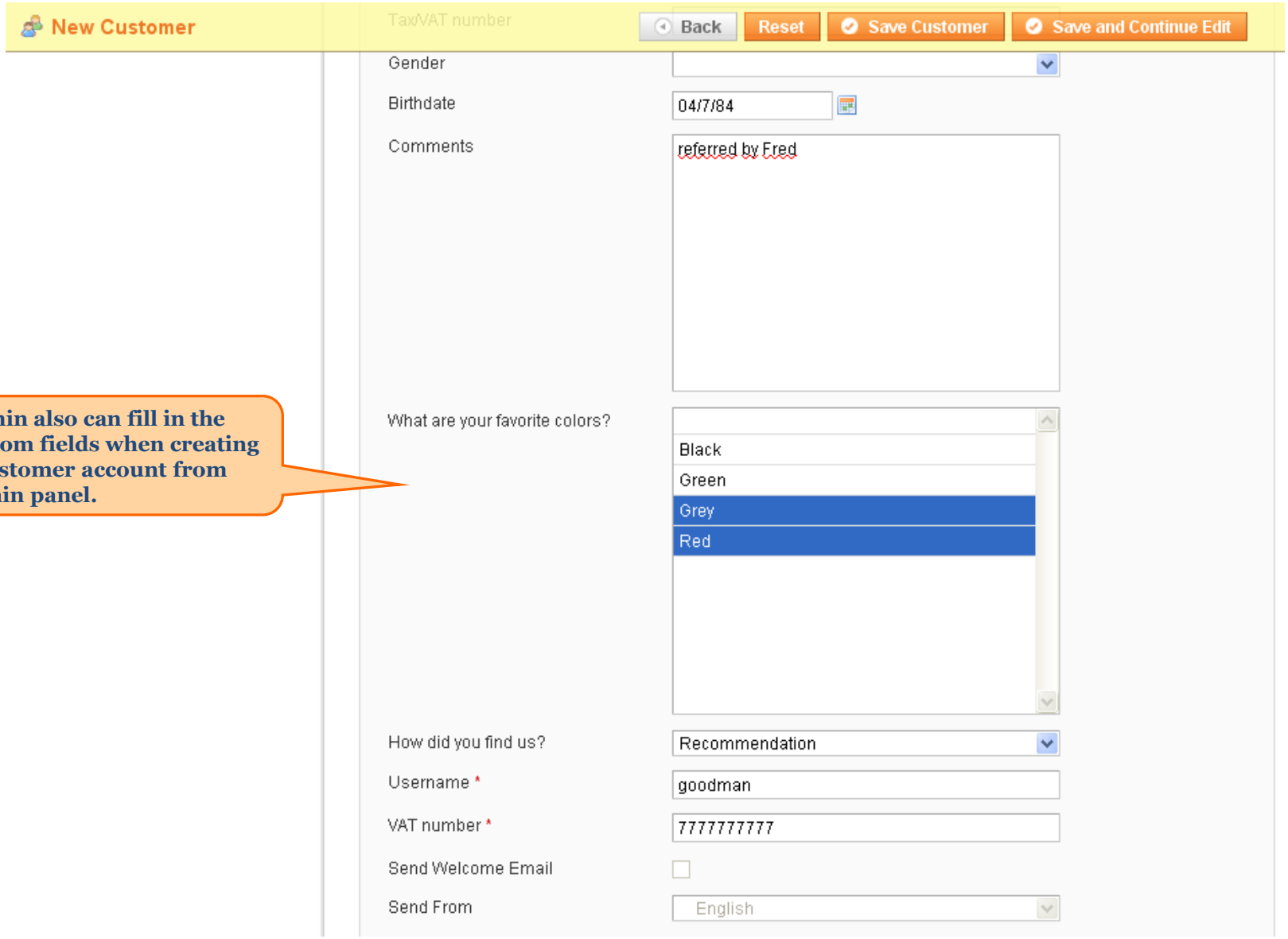
19. Customer Attributes in customer account



20. Customer Attributes in admin panel



20. Customer Attributes in admin panel



Admin also can fill in the custom fields when creating a customer account from admin panel.

You can add customer attributes to email templates using variables of the kind:

{{var customer.custom('some_attribute_code')}}

So if for example you have an attribute called username, use the following variable to add it to an email template:

{{var customer.custom('username')}}

Thank you!

Should you have any questions or feature suggestions, please contact us at:

http://amasty.com/contacts/

Your feedback is absolutely welcome!