

Customer Attributes User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via our email address below.

Edited: 22/08/2019 | By Magenest | Support Portal: <https://servicedesk.izysync.com/servicedesk/customer/portal/42>

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Introduction

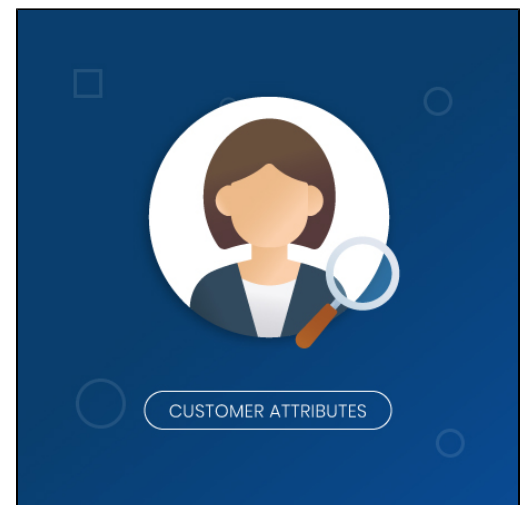
Customer Attributes extension allows the merchant to collect and manage more information from the customer, which is essential for their business strategy.

Features

- Create unlimited customer attributes.
- Multiple attribute input types: text, text area, date, dropdown, multi-select, yes/no, single file upload, multiple select with images, single radio with image.
- Collect more information from the customer by the additional attributes.
- Allow admin to manage attributes: view, edit and delete attributes.
- Login as a customer from the backend.
- Add new attributes to the registration form page and account information page.
- Set the default value for the attribute.
- Set the order of the attributes to display on the frontend.
- Input validation for attributes.
- Allow customers to edit the additional information.

System Requirements

Your store should be running on Magento Community Edition version 2.2.x, 2.3.x, and 2.4.x.



Configuration

1. Add a new attribute

On the Admin Sidebar, tap **Customer**, then choose **Manage Attributes**.

On the **Manage Customer Attributes** page, Admin can view and manage the available attributes or create a new attribute by clicking on **Add New Attribute** button.

ID	Code	Type	Label	Sort Order	Customer Group	Show on Storefront	Show on Customer Registration	Show on Customer Account	Show on Customer Checkout	Show on Select Customer Grid	Show on Customer Grid	Filter in Customer Grid	Action
157	test_age	Text	Age	1	General Wholesale Retailer	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Select
158	test_file	Single File Upload	video intro	2	General Wholesale Retailer	Yes	Yes	Yes	No	Yes	Yes	Yes	Select
159	test_select	Select	Select Brand	3	General	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Select
160	test_ms	Multiple Select	MultiSelect Test	4	General	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Select
161	test_msi	Multiple Select With Images	Select Image	6	General Wholesale Retailer	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Select
162	test_date	Date	Date	7	General	Yes	No	No	No	No	No	No	Select
163	test_yn	Boolean	Yes/No	8	General	Yes	No	No	No	No	No	No	Select
164	test_sim	Single Radio With Image	Single Image Select	10	General	Yes	Yes	Yes	Yes	No	No	No	Select
165	test_area	Text Area	Text Area	10	General	Yes	No	No	No	No	No	No	Select

On the **New Customer Attribute** page:

Properties

Input Type: there are 9 options for the input type of customer attribute.

Default Label *

Attribute Code *

For internal use. Must be unique with no spaces

Input Type *

Default Value

Is Required

Customer Group *

Input Validation

+ Default Label: enter the name of the attribute which will display as the attribute title on the frontend.

+ Attribute Code: enter the identified code for the attribute.

+ Input Type: there are 9 options for the input type of customer attribute.

1

Text Field

- This is a single line input field for text.

Input Type *	Text Field ▼
Default Value	
Is Required	No ▼
Customer Group *	NOT LOGGED IN General Wholesale Retailer
Input Validation	All Validates ▼

- Default Value:** enter the default text which appears in the field as a suggestion. Customer can edit the text.
- Input Validation:** select among 6 options: Alphanumeric, Numeric Only, Alpha Only, URL, Email, Date and All Validates.

Text Field type display:

Note *

2

Text Area

This is a multiple-line input field for entering paragraphs of text.

Input Type *	Text Area ▼
Default Value	

- Default Value:** enter the default text which appears in the field as a suggestion. Customer can edit the text.
- Text Area** type display:

Please leave your comment in here *



3

Date

The date can be entered by making a selection from the popup calendar.

Input Type *

Default Value

- **Default Value:** choose the default value which appears in the field as a suggestion. Customer can choose another date.
- **Date** type display:

Date *

Jun 2021

SU	MO	TU	WE	TH	FR	SA
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

4

Multiple Select

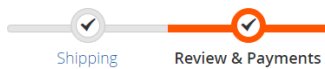
This type allows displaying a drop-down list of values. To select more than one option, the customer can hold the Ctrl key down and click each item.

Input Type * Multiple Select ▼

Add Options

Is Default	Show options in admin *	Show options in storefront *	Actions
☐	reading	Reading	
☒	walking	Walking	
☒	studying	Studying	
☐	learning	Learning	
Add Option			

- Click on **Add Option** button to add more option to the drop-down list for the attribute.
- Tick on the tickbox under **Is Default** column to set the option as default.
- **Show option in admin:** enter the title of the option which displays on the backend.
- **Show option in storefront:** enter the title of the option which displays on the customer side.
- **Multiple Select** type display:



[Additional Information Form](#) ^

Additional Information

Which group of our product you are interested in? *

How do you feel about our service? *

Choose a location you would like for our next store

Will you refer our service to the other?

Payment Method

Check / Money order

☒ My billing and shipping address are the same

Order Summary

Cart Subtotal	\$200.00
Shipping	\$10.00
Flat Rate - Fixed	
Order Total	\$210.00
1 Item in Cart	▼

Ship To:

1, 1, 1
1, American Samoa 12345-6789
United States
2345657668

Shipping Method:

Flat Rate - Fixed

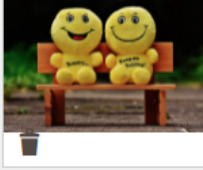
Multiple Select With Images

There will be a list of options with images for customer's selection.

Input Type *

Multiple Select With Images ▼

Add Options

Is Default	Image *	Image Title *	Actions
	Upload  smile.jpg 640x426, 79 KB	Smile	
	Upload  Images.jpeg 275x183, 8 KB	Travel	

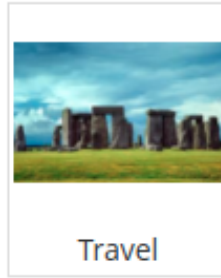
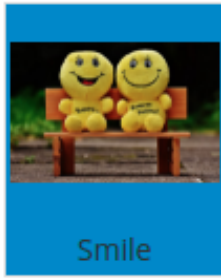
Add Option

Is Required

Frontend and Backend ▼

- Click on **Add Option** button to add more option.
- Choose the image and fill the title for each option.
- **Multiple Select With Images** type display:

Select Image *



6

Dropdown

This type displays a drop-down list of values for customer selection.

Add Options

Is Default	Value *	Actions
☐	1	
☐	2	
☒	3	
Add Option		

Other Option Label Input

- Click on **Add Option** button to add more option.
- **Value:** Enter the title for each option in the dropdown list.
- **Other Option Label Input:** enter the text for the last option in the drop-down list, which is the option for the customer who has the question beyond the listed answers in the default list.
- **Dropdown** type display:

How do you feel about our service? *

Bad

----- Select -----

Great

Good

Not bad

Bad

Bad *

Enter Bad: How do you feel about our service?

7

Yes/No

This type allows displaying a drop-down list with pre-defined options of “Yes” and “No”.

Input Type *	Yes/No ▼
Default Value	No ▼
Is Required	No ▼

- **Default Value:** choose the value that will be marked by default. Customers can choose another option.
- **Yes/No** type display:

Yes/No *

Yes ▼
 Yes
 No

8

Single radio Image

There will be a list of options with images that allows the customer to select only one option.

Input Type *	Single Radio Image ▼		
Add Options			
Is Default	Image *	Image Title *	Actions
Add Option			

- Click on **Add Option** button to add more option.
- Choose the image and fill the title for each option, which will display with the image.
- **Single radio Image** type display:

Please choose one card for you! *



Bonus \$30 for the bill



9

Single File Upload:

Input Type *

Is Required

Max File Size

In Mb, server upload max filesize: 8 MB

File Types

List comma-separated file types with no spaces, like: png,txt,jpg

- **Max file size:** the maximum size for the uploaded file (MB)
- **File types:** file types allowed to upload, list comma-separated file types with no spaces, like png,txt,jpg.

+ **Is Required:** decide whether the attribute is required to be filled by the customer among 3 options: Frontend and Backend, No, Only Frontend.

+ **Customer Group:** select the customer group to display the attribute.

Admin Configuration and Store Configuration

Admin can set for the display of the attribute in the backend and frontend by choosing Yes or No in each field.

The screenshot shows a web interface with two main sections: 'Admin Configuration' and 'Store Configuration'. The 'Admin Configuration' section has three dropdown menus: 'Use in Customer Grid' (set to 'No'), 'Filter in Customer Grid' (set to 'No'), and 'Display on the Select Customer Grid' (set to 'No'). Below these is a note: 'This applies to the customer grid which is use select a customer during order creation at the backend'. The 'Store Configuration' section has four fields: 'Show on Storefront' (set to 'Yes'), 'Sort Order' (a text input field with a red asterisk), 'Show on Customer Registration' (set to 'No'), and 'Show on Customer Account Edit' (set to 'No').

+ **Use In Customer Grid:** choose **Yes** to show the attribute in the customer grid.

+ **Filter In Customer Grid:** choose **Yes** to use the attribute to filter in searching customers.

+ **Display on the select customer grid:** choose Yes to show the attribute in the select customer grid, which is available when you create the order from the back-end.

+ **Show On Storefront:** choose Yes to enable the attribute on the store.

+ **Sort Order:** set the position of the new attribute among other attributes.

+ Choose Yes / No to allow the attribute to display on the Customer Registration, Customer Account, and Customer Checkout page at the store.

⚠ **Note:** The attribute with the **Single File Upload** input field will **NOT** display on the checkout page.

+ After finishing the setup, click **Save** to save the attribute and view it on the frontend.

2. Add a new attribute relation

With the attribute relation, the additional information displayed in related attributes form helps strengthen the interaction between different attributes, then create a logical structure for merchants to better gather customers' insight.

+ On the Admin sidebar, go to **Customer > Manage Attributes Relation**.

+ On **Manage Customer Attributes Relation** page, admin can view and manage the relation of the available attributes or create a new relation by clicking on Add New Attribute Relation button.

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+ On **New Customer Attribute Relation** page

- **Relation Name:** Enter the title of the attribute relation which will display on the backend.
- **Parent:** Select an attribute on the drop-down list to create a new relation.

⚠ **Note:** Admin can select the parent attribute with the following types only: Dropdown, Yes/No and Single Radio Image.

- **Parent Option:** Select an option of the parent attribute to lead to different dependent attributes.

Note: Admin can set a new relation for only one parent option at once.

- **Dependent Attributes:** Select one or more dependent attributes that the parent option will lead to.

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+ After finishing the configuration, click on **Save Relation** button to save.

+ The layout of attribute relation on the front-end

The screenshot displays a configuration window titled 'Additional Information'. It contains a 'Parent option' dropdown menu with the question 'Do you take brand name into consideration when shopping?'. The 'Yes' option is selected. Below this, two 'Dependent attribute' fields are shown. The first field, 'Which of the following brand logos do you recognize?', displays four brand logos: Nike, Adidas, Vans, and Converse. The second field, 'Which aspects concern you when shopping?', displays a list of options: Brand, Price, Trend, and Taille. Arrows indicate the flow from the parent option to the dependent attributes.

The dependent attributes will display when the parent option is selected

Functions

On Storefront

The configured attributes will display as additional information at the storefront.

+ Additional information on the Customer Registration page

There will be additional fields besides the default attributes of Magento on the registration form, which help the merchant collect more necessary information from the customer.

Create New Customer Account

Personal Information

First Name *

Last Name *

☐ Sign Up for Newsletter

☐ Allow remote shopping assistance ?

Sign-in Information

Email *

Password *

Password Strength: No Password

Confirm Password *

* Required Fields

Additional Information

Age *

Video Intro *

No file chosen

Select Brand

Single Image Select *



CC

☐

BI

☐

Travel

☐

Multiselect Test *

Brand Fav *



Travel

☐

Sky

☐

Bugs

☐

Create an Account

Additional information on Edit Account Information page

All the attributes set in the extension will display in the Additional Information section, which customers can edit on My Account page.

My Account
My Orders
My Downloadable Products
My Wish List

Address Book

Account Information

Stored Payment Methods

My Product Reviews

Newsletter Subscriptions

Edit Account Information

Account Information

First Name *

Veronica

Last Name *

Costello

☐ Change Email

☐ Change Password

☒ Change Additional Information

Additional Information

Age *

21

Video Intro *

[example.mp4](#)

No file chosen

Select Brand

Tesla

Multiselect Test *

AA
BB
DD

Select Image *



Smile



Travel

Rteee

Tet 1
Tet 2

Brand Fav *



Travel



Sky





+ Additional information on the Customer Checkout page

A screenshot of the LUMA Customer Checkout page. The page is titled 'LUMA' and shows a progress bar with two steps: 'Shipping' (completed) and 'Review & Payments' (active). The 'Additional Information Form' is expanded, showing fields for 'Which group of our product you are interested in?' (dropdown menu with options: For Children, For Teenager, For Adult), 'How do you feel about our service?' (dropdown menu with option: Great), 'Choose a location you would like for our next store' (dropdown menu with option: American Samoa), and 'Will you refer our service to the other?' (dropdown menu with option: Yes). There is a 'Save' button. Below the form is the 'Payment Method' section, which shows 'Check / Money order' and a checkbox for 'My billing and shipping address are the same'. On the right side, there is an 'Order Summary' box showing 'Cart Subtotal' (\$200.00), 'Shipping' (\$10.00), and 'Order Total' (\$210.00). Below the summary is the 'Ship To:' section, which shows the address '1, 1, 1, 1, American Samoa 12345-6789, United States, 2345657668' and a 'Shipping Method:' dropdown menu with the option 'Flat Rate - Fixed'.

⚠ Note:

- The attribute with the **Single File Upload** input field will **NOT** display on the checkout page.
- Only logged-in customers can view additional information (attributes) on the checkout page.

On Back-end

+ Additional information displays on the customer grid.

Create New Order for New Customer

← Back

Please select a customer

Create New Customer

Search

Reset Filter

4 records found

20 per page

1 of 1

ID	Name	Email	Phone	ZIP/Post Code	Country	State/Province	Signed-up Point	Website	Age	video intro	Select Brand	Multiselect Test	Select Image
					All Countries								
4	Ngoc Ngoc	ngoc12322@gmail.com					Default Store View	Main Website	19	big_buck_bunny_720p_1mb.mp4	Tesla	A,CC	
3	lee le bb	test@gmail.com					Default Store View	Main Website	21	big_buck_bunny_720p_1mb.mp4	Tesla	A	
2	Lee Jenick	jenick@gmail.com					Default Store View	Main Website	22	big_buck_bunny_720p_1mb.mp4		BB	
1	Veronica Costello	roni_cost@example.com	(555) 229-3326	49628-7978	United States	Michigan	Vietnamese	Main Website	21	example.mp4	Tesla	BB	

+ Additional information is used to filter in the customer grid.

Customers

Add New Customer

Search by keyword

Filters

Default View

Columns

Export

ID

Customer Since

Name

Email

from

from

to

to

Group

Phone

ZIP

Country

State/Province

Web Site

Age

video intro

Cancel

Apply Filters

Actions

4 records found

20 per page

1 of 1

+ Additional information displays on the Customer Information page.

Admin can view and edit customer information from the backend, including the additional information.

Veronica Costello

[← Back](#)
[Login as Customer](#)
[Delete Customer](#)
[Reset](#)
[Create Order](#)
[Reset Password](#)
[Force Sign-In](#)
[Login Account](#)
[Save and Continue Edit](#)
[Save Customer](#)

CUSTOMER INFORMATION

Customer View
Account Information
Addresses
Orders
Shopping cart
Newsletter
Billing Agreements
Product Reviews
Wish List
Additional Information

Additional Information

Age * 21

video intro
example.mp4
☐ Delete File
 No file chosen

Select Brand
Tesla

Multiselect Test *
A
BB
CC

Select Image *
 Smile
 Travel

Date * 06/09/2021

Yes/No * Yes

+ Login Account

On the customer information page from the backend, admin can log in to the customer account from the backend by clicking on the **Login Account** button.

Jessie Schlosser

[← Back](#)
[Delete Customer](#)
[Reset](#)
[Reset Password](#)
[Force Sign-In](#)
[Login Account](#)
[Save and Continue Edit](#)
[Save Customer](#)

CUSTOMER INFORMATION

Customer View
Account Information
Addresses
Billing Agreements
Wish List
Additional Information

Personal Information

Last Logged In: Oct 26, 2019, 7:51:04 AM (Offline)
Account Lock: Unlocked
Confirmed email: Confirmation Not Required
Account Created: Oct 8, 2019, 7:51:44 AM
Account Created in: Default Store View
Customer Group: General

Default Billing Address
The customer does not have default billing address.

+ Export the customer data

Admin can export the customer data to CSV, XML, and Excel according to their needs.

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+ Attribute Report

Admin can view each attribute report and improve customer flow analysis. The report is shown at the bottom of the attribute detail page.

[blocked URL](#)

Update

- When a new update is available, we will provide you with a new package containing our updated extension.
 - You will have to delete the module directory and repeat the installation steps above.
 - Flush the config cache. Your store and newly installed module should be working as expected.
-

Support

- We will reply to support requests within **2 business days**.
 - We will offer **lifetime free update and 6-month free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
 - Support **DOES NOT** include other services such as customizing our products, installation and uninstallation service.
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Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.