

**amasty**



For more details see the [Customer Attributes](#) extension page.

## Guide for Customer Attributes

Customer Attributes Magento extension enables you to get extra information from your customers. Provide additional field on the registration page and collect valuable customers' information like age, preferences, interests, and more. Receive documents and other information that you may need.

- Equip registration page with unlimited number of additional fields
- Manage collected data from the admin panel
- Support for multiple field types and dependent attributes
- Activate new customers' accounts
- Implement an effective customers' segmentation

### Creating New Customer Attributes

To create a new attribute please go to **Customers → Manage Attributes** in the admin panel and click the **Add New Attribute** button to create an attribute.

**Attribute Properties**

Attribute Code *	<input type="text"/> ▲ For internal use. Must be unique with no spaces
Store View *	<div>All Store Views Main Website Main Website Store Default Store View German</div>
Catalog Input Type for Store Owner	Multiple Select
Values Required	No

First, specify the **Attribute Properties**:








**Attribute Code** — fill in the unique attribute code with no spaces;



**Store View** — define the store view to apply the attribute to;

**Catalog Input Type for Store Owner** — choose the input type and configure its settings. See extra settings for various attribute types below;

**Values Required** — set the value as required for customers.

Attribute Configuration	
Show on the Customers Grid	Yes 
Show on the Orders Grid	Yes 
Show on the Order View page	Yes  ▲ In the Account Information block at the Backend
Show on the Account Information page	Yes  ▲ On the Frontend
Hide if Filled	Yes  ▲ On the Account Information page on the Frontend
Show on the Billing page	No  ▲ During Checkout
Show on the Registration page	No 
Sorting Order	<input type="text"/> ▲ The order to display field on frontend

Then, define the **Attribute Configuration**:

**Show on the Customers Grid** — add the attribute column to the customers grid;

**Show on the Orders Grid** — add the attribute column to the orders grid;

**Show on the Order View page** — add the attribute to the order view page;

**Show on the Account Information page** — add the attribute to the account information page;

**Show on the Billing page** — add the attribute to the billing page;

**Show on the Registration page** — add the attribute to the registration page;

**Sorting Order** — define the attribute's sorting order.



**Attribute Information**

Properties

Manage Label / Options

Manage Option Images

**Edit Customer Attribute "What is your favorite color?"**

If you do not specify an option value for a specific store view then the default value will be used.

**Manage Titles**

Admin

Default Store  
View

German

What is your favorite

Then, switch to the **Manage Label / Options** tab. Here, you can indicate the attribute's title for the admin panel and different store views.

**Attributes with Images**

For **Multiple Checkbox Select with Images** and **Single Radio Select with Images** field types you can also upload images for each option (this is not mandatory).

**Edit Customer Attribute "What is your favorite color?"**

Back

Delete

**Manage Images**

Status Label

Upload icon image

Preview

Delete

Yellow

Choose File

no file selected

☐

Red

Choose File

no file selected

☐

Green

Choose File

no file selected

☐

Blue

Choose File

no file selected

☐

Black

Choose File

no file selected

☐

When you've indicated all the necessary options for **Multiple Checkbox Select with Images** (or **Single Radio Select with Images**) field type attribute, please press the **Save and Continue Edit** button. **Manage Option Images** tab should appear.

If you would like to create checkbox attribute or radio button attribute without images, just press **Save Attribute** without uploading the images.

Switch to the **Manage Option Images** tab to upload images for the options. Select images to upload from your computer. After you've chosen images for all the options, please press the **Update Images**



button, otherwise images will not get uploaded.

When the images are uploaded, press the **Save Attribute** button to save the attribute.

## Static Text Attributes

**Attribute Properties**

Attribute Code *	<input type="text" value="position_in_the_company"/> <small>▲ For internal use. Must be unique with no spaces</small>
Store View *	<div>All Store Views Main Website Main Website Store Default Store View German</div>
Catalog Input Type for Store Owner	<div>Text Field</div>
Default value	<input type="text"/>
Unique Value	<div>Yes</div> <small>▲ Not shared with other customers</small>
Values Required	<div>No</div>
Is Read Only	<div>No</div>
Input Validation	<div>None</div>

Use the Default Value to fill in the text. You can display text to customers on registration or customer account page.

## Single File Upload Attribute



Attribute Properties	
Attribute Code *	<input type="text" value="upload_id"/> ▲ For internal use. Must be unique with no spaces
Store View *	<div>All Store Views</div> <div>Main Website</div> <div>Main Website Store</div> <div>Default Store View</div> <div>German</div>
Catalog Input Type for Store Owner	Single File Upload ▲▼
Values Required	No ▲▼
Max File Size	<input type="text" value="100"/> ▲ In Mb
Image Dimentions	<input type="text"/> ▲ In pixels like: 30/40 (where 30 - width, 40 - height)
File Types	<input type="text" value="png,jpg"/> ▲ List comma-separated file types with no spaces, like: png,txt,jpg

For the **Single File Upload** attribute you can specify the **Max File Size**, **Image Dimensions** and **File Types** that will be supported.

## Customer Attributes Grid



Manage Customer Attributes

Add New Attribute

Page 1 of 1 pages | View 20 per page | Total 11 records found

Reset Filter

Search

Code	Label	Type	Sorting Order	Show on the Customers Grid	Show on the Orders Grid	Show on the Order View page	Show on the Account Information page	Show on the Registration page
are_you_hired	Are you hired at the moment?	Yes/No	3	No	No	Yes	Yes	Yes
company_name	Name of the company	Text Field	9	No	No	No	Yes	Yes
company_specialization	Company specialization	Text Area	10	Yes	Yes	Yes	Yes	Yes
customer_group	Customer group	Dropdown	1	No	Yes	No	Yes	Yes
date_of_birth	Date of birth	Date	6	Yes	Yes	No	Yes	Yes
fav_color	What is your favorite color?	Multiple Select	7	Yes	Yes	Yes	Yes	Yes
how_did_you_find_us	How did you find us?	Multiple Select	5	No	Yes	Yes	Yes	Yes
position_in_the_company	What is your position in the company?	Text Field	4	Yes	Yes	Yes	Yes	Yes
register_as	You register as	Dropdown	2	Yes	No	No	Yes	Yes
static_text	Dear visitor!	Static Text	0	No	No	No	No	Yes

All created customer attributes are available on the attributes grid. Navigate to **Customers → Manage Attributes** to see the grid. Here, you can find attributes and their values.

# Creating a New Dependent Attribute



### Relation Properties

Relation name \*

company

▲ For internal use

Parent Attribute \*

You register as

Attribute Options \*

Company  
Individual

Dependent Attributes \*

Are you hired at the moment?  
Name of the company  
Company specialization  
Customer group  
Date of birth  
What is your favorite color?  
How did you find us?  
What is your position in the company?  
Dear visitor! - Not Visible  
Please, upload your ID

To create dependencies between attributes please go to **Customers → Manage Attributes → Manage relations**. To add a new relation please click the **Add New Relation** button.

**Relation Name** — fill in the relation title;

**Parent Attribute** — select the parent attribute;

**Attribute Options** — choose to which attribute value the dependent attributes should be assigned;

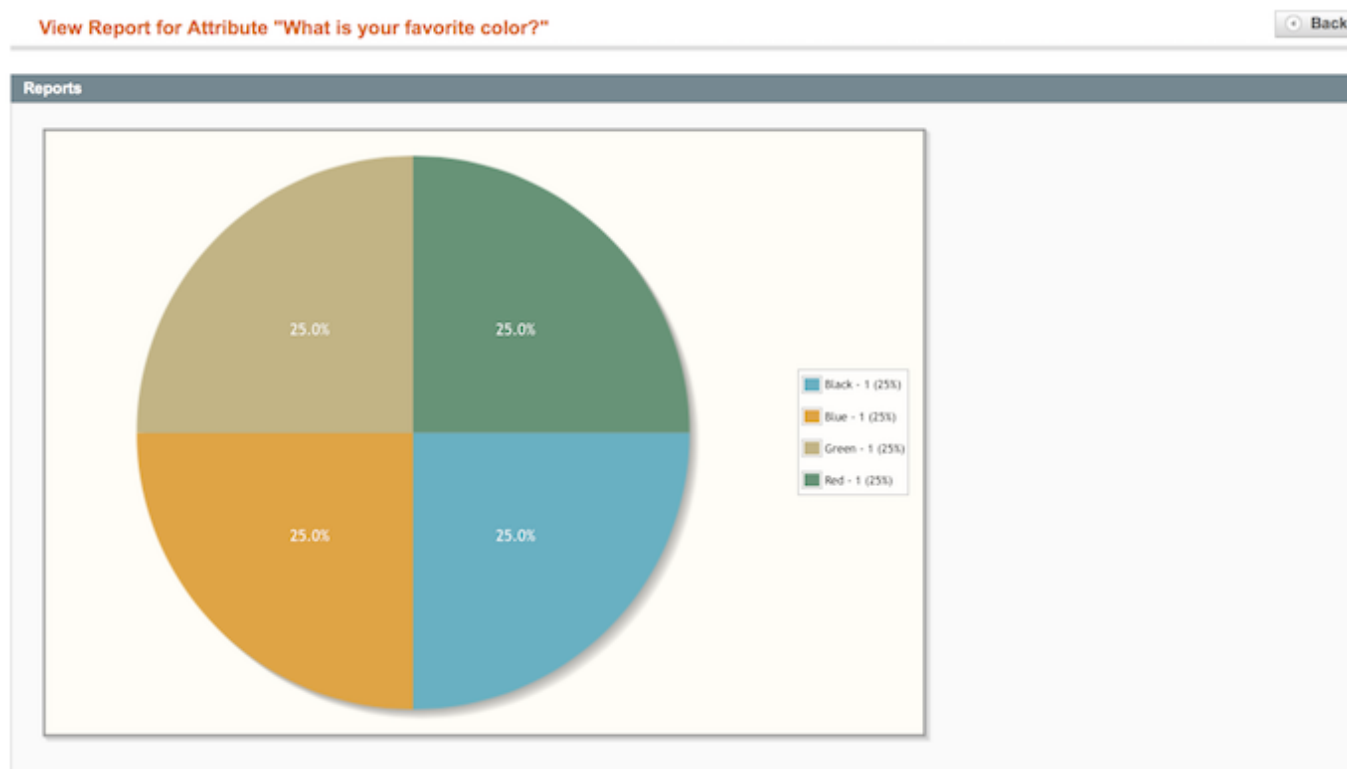
**Dependent Attributes** — choose the dependent attributes. The fields selected here will be displayed only when a customer selects the specific attribute option that we set above.

## Customer Attributes Reports



Manage Attributes Relation					<a href="#">Add New Relation</a>
Page 1 of 1 pages   View 20 per page   Total 3 records found					<a href="#">Reset Filter</a> <a href="#">Search</a>
<a href="#">Select All</a>   <a href="#">Unselect All</a>   <a href="#">Select Visible</a>   <a href="#">Unselect Visible</a>   0 items selected					<a href="#">Submit</a>
Relation Name	Parent Attribute	Dependent Attributes	Attribute Codes	Action	
Any					
<input type="checkbox"/> company	You register as	Name of the company, Company specialization, What is your position in the company?	register_as, company_name, company_specialization, position_in_the_company	<a href="#">Edit</a>	
<input type="checkbox"/> 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	<a href="#">Edit</a>	
<input type="checkbox"/> New	What is your favorite color?	Name of the company	fav_color, company_name	<a href="#">Edit</a>	

To see **Customer Attributes Reports** please go to **Customers → Customer Attributes → Reports**. Click on one of the attributes from the grid to see the report.



Reports are created only for selectable attributes such as checkboxes, multiple selects, drop-downs and radio buttons.

## 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.

## General Extension Settings

To configure the extension please go to **System → Configuration → Customer Attributes**.



General Settings		
Display customer attributes on the select customer grid	<div>Yes</div> <div>▲ This applies to the customers grid which is used to select a customer during order creation at the backend</div>	[WEBSITE]
Allow customer to change his group	<div>No</div>	[WEBSITE]
Check upload file type	<div>No</div> <div>▲ Check MIME content type of upload file</div>	[WEBSITE]
Show address fields on the Registration page	<div>Yes</div>	[STORE VIEW]
Try to output on Frontend	<div>Yes</div> <div>▲ Without modifications in templates</div>	[WEBSITE]

**Display customer attributes on the select customer grid** — set this option to **Yes** to see the attributes when you select a customer during order creation from the backend;

**Allow customer to change his group** — set to **No** to forbid customers to change the group they belong to;

**Check upload file type** — enable MIME verification for uploaded files;

**Show address fields on the Registration page** — enable address fields right on the registration page;

**Try to output on Frontend** — enable this option to try showing address fields on the registration page without modifying the template.

If you would like to let your customers use a custom attribute for login instead or together with email, please go to System → Configuration → Customer Attributes and make sure that the **Unique Value** option for the custom attribute is set to **Yes**.

Expand the **Login Settings** section.



Login Settings		
Use for customer login	- Magento Default (E-mail) -	[GLOBAL]
▲ The attribute chosen here will be used for customer login together with or instead of email.		
Disable email login	No	[GLOBAL]
▲ If set to 'Yes', customers will be able to login only by the custom attribute chosen above. If set to 'No', customers will be able to login using either the custom attribute or email.		
Modify field title on the login page	No	[GLOBAL]

**Use for customer login** — choose which attribute to use for login;

**Disable email login** — if you would like to use only the custom attribute for login (not in parallel with email), please set this 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);

**Modify field title on the login page** — when set 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.

Expand the **Forgot Password Settings** section.

Forgot Password Settings		
Use for forgot password	- Magento Default (E-mail) -	[GLOBAL]
▲ The attribute chosen here will be used for forgot password together with or instead of email.		
Field Title		[STORE VIEW]
▲ If leave empty, then will be used the 'Email Address' title.		
Disable email for forgot password	No	[GLOBAL]
▲ If set to 'Yes', customers will be able to retrieve his password only by the custom attribute chosen above. If set to 'No', customers will be able to retrieve his password using either the custom attribute or email.		
Text		[STORE VIEW]
▲ If leave empty, then will be used standard text.		

**Use for forgot password** — choose the attribute that will be used by customers together with or instead of email;

**Field Title** — fill in the title of the field;



**Disable email for forgot password** — set this option to **Yes** and customers will be able to recover the password only with the specified attribute;

**Text** — fill in the extra text to display.

Expand the **Customer Account Activation Settings** section.



Customer Account Activation Settings		
New Customers Require Activation	Yes	[STORE VIEW]
▲ All new customers will be not activated after registration.		
Activate Existing Customers	Activate	[GLOBAL]
▲ All pending customers will be activated.		
Activation Note		[STORE VIEW]
▲ Notification text to display to customer after registration.		
Activate New Customers Automatically	Yes	[STORE VIEW]
▲ This option will activate new customers automatically and apply all options above.		
Activation by Customer Group	Yes	[STORE VIEW]
Customer Groups for Automatic Activation	<div>General</div> <div>Wholesale</div> <div>Retailer</div>	[STORE VIEW]
Activation by Email Domain	Yes	[STORE VIEW]
Email Domains for Automatic Activation	@example.com	[STORE VIEW]
▲ Specify each domain starting with @ and from a new line.		
Notify Customer About Activation	Yes	[STORE VIEW]
▲ Choose "Yes" to send an email to a customer after the profile activation.		
Customer Notification Email Sender	General Contact	[STORE VIEW]
Email Reply To		[STORE VIEW]
▲ Specify the separate email address for replies or leave blank to use the sender address instead. You can set only one email address in this field.		
Customer Notification E-mail Template	Customer activation notification (Default Template)	[STORE VIEW]
▲ Specify email template for notification letters to users upon activation.		
<b>Admin Notification</b>		[STORE VIEW]
Notify Admin on New Registration	Yes	[STORE VIEW]
▲ Site Administrator will receive an email after each new registration.		
Admin Email Address		[STORE VIEW]
▲ Specify the site administrator email for notifications. Multiple comma separated emails are allowed.		
Admin Notification Email Sender	General Contact	[STORE VIEW]
Admin Notification Email Template	New account notification for admin (Default Template)	[STORE VIEW]
▲ Select the email template for the notification letters.		



**New Customers Require Activation** — set this option to 'Yes' to manually activate the accounts of newly registered customers;

**Activate Existing Customers** — hit the 'Activate' button to immediately activate all registered customers with the 'Pending' status;

**Activation Note** — specify text that will be displayed to customers after registration;

**Activate New Customers Automatically** — enable this option to activate new customers automatically using two available conditions;

**Activation by Customer Group** — enable this option to automatically activate customers that are assigned to particular groups;

**Customer Groups for Automatic Activation** — select the required customer groups;

**Activation by Email Domain** — enable this option to automatically activate customers by the email domain;

**Email Domains for Automatic Activation** — specify email domains here;

**Notify Customer About Activation** — enable this option to notify customers about activation;

**Customer Notification Email Sender** — specify the email sender for activation emails;

**Email Reply To** — specify the address for replies or leave this field blank to use the sender address;

**Customer Notification E-mail Template** — choose the email template for notifications;

**Notify Admin on New Registration** — set this option to 'Yes' to get email notifications on every new customer registration;

**Admin Email Address** — specify the admin email address for notifications;

**Admin Notification Email Sender** — specify the sender address;

**Admin Notification Email Template** — choose the template for admin email notifications.

## Setting Up Activation Templates

When you've set up email notifications for admin and customers, go to **System → Transactional Emails** and click the **Add New Template** button.

Select the appropriate template for each kind of notifications: **New account notification for admin** or **Customer activation notification**. Once you've chosen the required template, please click the **Load Template** button.

You can add customer attributes to email templates using variables like:

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



For example, if you have an attribute called *username*, use the following variable should be added to an email template:

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

To add attributes for guests, the following variable should be added to the email template:

```
{{var guest.custom('some_attribute_code')}}}
```

## Manual Account Activation

**Manage Customers** Add New Customer

Page 1 of 1 pages | View 20 per page | Total 4 records found

Export to: CSV Export Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 2 items selected

	ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website	Activated	You register as	What is your position in the company
<input type="checkbox"/>	4	Customer Customer	test@example1.com	General	123456789	33150	United States	Alabama	Feb 23, 2015 4:40:28 AM	Main Website	Pending	Company	testaaaa
<input checked="" type="checkbox"/>	3	Test test	example1@example.com	General	345745	admin	United States	American Samoa	Mar 10, 2014 4:31:13 AM	Main Website	Pending	Individual	asdthgsh
<input checked="" type="checkbox"/>	2	John Mitchel	example@example.com	Retailer					Feb 12, 2014 3:25:00 AM	Main Website	Pending	Individual	Test
<input type="checkbox"/>	1	Kerry Nilson	kerry-nilson@example.com	Wholesale					Jul 17, 2013 5:29:18 AM	Main Website	Pending	Company	Manager

To manually activate customers' accounts please go to **Customers → Manage Customers**.

Tick off the customers which need to be activated and select the **Activate** option from the **Action** dropdown menu and then click the **Submit** button.

From:  
<https://amasty.com/docs/> - **Amasty Extensions FAQ**

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