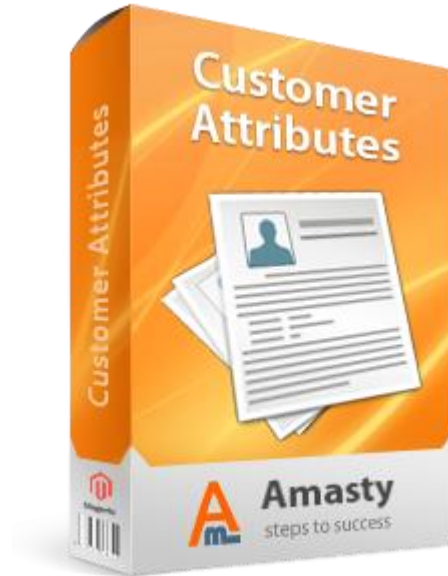


# Customer Attributes



## Magento Extension User Guide

**Official extension page:** [Customer Attributes](#)



User Guide: [Customer Attributes](#)

Support: <http://amasty.com/contacts/>

# Table of contents:

<u>1. How to create customer attributes .....</u>	<u>3</u>
<u>2. Field types of customer attributes that support images .....</u>	<u>8</u>
<u>3. Static text attributes .....</u>	<u>12</u>
<u>4. Single File Upload Attributes .....</u>	<u>13</u>
<u>5. Customer attributes grid .....</u>	<u>14</u>
<u>6. Dependent attributes .....</u>	<u>15</u>
<u>7. Customer attributes on 'Manage Customers' grid .....</u>	<u>18</u>
<u>8. Customer attributes on the list of customers for admin orders .....</u>	<u>19</u>
<u>9. Customer attributes on order grid .....</u>	<u>20</u>
<u>10. Customer Attributes: Reports.....</u>	<u>21</u>
<u>11. Customer Attributes for backend orders.....</u>	<u>23</u>
<u>12. General extension settings .....</u>	<u>24</u>
<u>13. Customer attribute instead of or together with email for login .....</u>	<u>27</u>
<u>14. Forgot Password Settings.....</u>	<u>28</u>
<u>15. Customer Account Activation Settings.....</u>	<u>29</u>
<u>16. Customer Account Activation.....</u>	<u>32</u>
<u>17. Example of customer attributes on registration page .....</u>	<u>33</u>
<u>18. Example of customer attributes on billing information page .....</u>	<u>34</u>
<u>19. Customer Attributes in customer account .....</u>	<u>35</u>
<u>20. Customer Attributes in admin panel .....</u>	<u>36</u>
<u>21. How to add customer attributes to customer-related emails .....</u>	<u>38</u>



# 1. How to create customer attributes

Dashboard Sales Catalog Mobile **Customers** Promotions Newsletter CMS Reports System help for this page

**Manage Customer Attributes**

Page 1 of 1 pages | View 20 per page

Reset Filter Search

Click 'Add New Attribute' to create an attribute.

After the installation please go to admin area > Customers > Manage Attributes.

Code	Label	Type	Sorting Order	Show on the Orders Grid	Show on the Order View page
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
customer_group	Customer group	Dropdown	1	No	Yes
date_of_birth	Date of birth	Date	6	Yes	No
fav_color	What is your favorite color?	Multiple Select	7	Yes	Yes



# 1. How to create customer attributes

The screenshot shows the 'New Customer Attribute' configuration interface. On the left, the 'Attribute Information' sidebar includes 'Properties' and 'Manage Label / Options'. The main area is titled 'New Customer Attribute' and contains 'Attribute Properties'.

**Attribute Properties:**

- Attribute Code \***: A text input field containing 'position\_in\_the\_company'. A note below it states: '▲ For internal use. Must be unique with no spaces'.
- Store View \***: A dropdown menu showing a list of store views: 'All Store Views', 'Main Website', 'Main Website Store', 'Default Store View', and 'German' (which is highlighted in blue).
- Catalog Input Type for Store Owner**: A dropdown menu with 'Text Field' selected. The list of options includes: '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', and 'None'.
- Default value**: An empty text input field.
- Unique Value**: A checkbox that is currently unchecked.
- Values Required**: A checkbox that is currently unchecked.
- Is Read Only**: A checkbox that is currently unchecked.
- Input Validation**: A checkbox that is currently unchecked.

**Callouts:**

- A callout pointing to the 'Attribute Code' field: "Specify the value which will be shown by default."
- A callout pointing to the 'Unique Value' checkbox: "If you want the attribute value to be unique for each customer, please set this option to 'Yes'."
- A callout pointing to the 'Catalog Input Type' dropdown: "Select the field type from the list. Settings for the chosen type will appear."



# 1. How to create customer attributes

## Attribute Information

Properties

Manage Label / Options

## New Customer Attribute

### 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 style="border: 1px solid #ccc; padding: 2px;"><p>All Store Views</p><p><b>Main Website</b></p><p><b>Main Website Store</b></p><p>Default Store View</p><p>German</p></div>
Catalog Input Type for Store Owner	<input type="text" value="Text Field"/>
Default value	<input type="text"/>
Unique Value	<input type="text" value="No"/> <small>▲ Not shared with other customers</small>
Values Required	<input type="text" value="No"/>
Is Read Only	<input type="text" value="No"/>
Input Validation	<input type="text" value="None"/>

### Attribute Configuration

Show on the Customers Grid	<input type="checkbox"/>
Show on the Orders Grid	<input type="checkbox"/>
Show on the Order View page	<input type="checkbox"/>
Show on the Account Information page	<input type="checkbox"/>

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

Set "Values Required" to "Yes" to make the attribute mandatory.

You can choose the type of input validation.



# 1. How to create customer attributes

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

Attribute Configuration	
Show on the Customers Grid	<input type="text" value="No"/>
Show on the Orders Grid	<input type="text" value="No"/>
Show on the Order View page	<input type="text" value="Yes"/> <small>▲ In the Account Information block at the Backend</small>
Show on the Account Information page	<input type="text" value="Yes"/> <small>▲ On the Frontend</small>
Do not Show if Filled	<input type="text" value="No"/> <small>▲ On the Account Information page on the Frontend</small>
Show on the Billing page	<input type="text" value="Yes"/> <small>▲ During Checkout</small>
Do not Show if Filled	<input type="text" value="No"/> <small>▲ On the Billing page during Checkout</small>
Show on the Registration page	<input type="text" value="No"/>
Sorting Order	<input type="text" value="3"/> <small>▲ The order to display field on frontend</small>


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)



# 1. How to create customer attributes

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 t <input type="text"/>	<input type="text"/>	<input type="text"/>

Please indicate the attribute title (and options where applicable) at the 'Manage Label/Options' tab.



## 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 \*

fav\_color

▲ 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

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

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). Please see next pages for more information about this.





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

### Attribute Information

Properties

### Manage Label / Options

### New Customer Attribute

Back

Reset

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

English

French

German

What are your fav

### Manage Options (values of your attribute)

Admin

English

French

German

Position

Is Default

+ Add Option

Black

Delete

Green

Delete

Grey

Delete

Red

Delete



## 2. Types of attributes which support images

### Attribute Information

Properties

Manage Label / Options

**Manage Option Images**

### Edit Customer Attribute "What are your favorite colors?"

Back

Reset

Delete Attribute

Save Attribute

Save And Continue Edit

### Manage Images

Update Images

Status Label	Upload icon image	Preview	Delete
Red	<input type="button" value="Choose File"/> red.png	[none]	<input type="checkbox"/>
Grey	<input type="button" value="Choose File"/> grey.png	[none]	<input type="checkbox"/>
Green	<input type="button" value="Choose File"/> green.png	[none]	<input type="checkbox"/>
Black	<input type="button" value="Choose File"/> black.png	[none]	<input type="checkbox"/>

Please go to 'Manage Option Images' tab to upload images for the options. If you 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

Manage Option Images

### Edit Customer Attribute "What are your favorite colors?"

Back

Reset

Delete Attribute

Save Attribute

Save And Continue Edit

### Manage Images

Update Images

#### Status Label

Red

Once the images get uploaded press 'Save Attribute' button to save the attribute.

#### Preview

#### Delete



Grey

Choose File

No file chosen



Green

Choose File

No file chosen



Black

Choose File

No file chosen



#### 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

## Attribute Information

Properties

Manage Label / Options

## New Customer Attribute

Back

Save Attribute

Save And Continue Edit

### Attribute Properties

Attribute Code \*

file\_upload

▲ 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

Single File Upload

Values Required

No

Max File Size

5 mb

▲ In Mb

Image Dimentions

150/110

▲ In pixels like: 30/40 (where 30 - width, 40 - height)

File Types

png, txt, jpg

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

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

## Manage Customer Attributes

[+ Add New Attribute](#)

Page  of 1 pages | View  per page | Total 10 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	Show on the Billing page
how_did_you_find_us	How did you find us?	Dropdown	4	Yes	Yes	Yes	No	Yes	No
fav_color	What is your favorite color?	Multiple Select	3	Yes	Yes	Yes	Yes	Yes	Yes
terms_conditions	Terms and conditions	Text Area	6	No	No	No	No	Yes	No
test_date	Date of birth	Date	2	Yes	No	No	Yes	Yes	Yes
you_register_as	You register as	Dropdown	1	Yes	Yes	Yes	No	Yes	No
test_upload	Please, upload your photo	Single File Upload	5	Yes	No	No	Yes	Yes	No

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



## 6. Dependent attributes

Dashboard Sales Catalog Mobile **Customers** Promotions Newsletter CMS F

**Manage Attributes Relation**

Page 1 of 1 pages | View 20 per page

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

Actions Submit

**To add a new relation please click 'Add New Relation' button.**

**To create dependences between attributes please go to admin panel -> Customers -> Manage Attributes -> Manage relations.**

	Relation Name	Parent Attribute	Dependent Attribute	Attribute Codes	Action
<input type="checkbox"/>	company	You register as	Name of the company, 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>



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Dashboard Sales Catalog Mobile **Customers** Promotions Newsletter CMS Reports System

**Relation Information**

**Edit Relation "company"** Back New Attribute New Relation Save

**Relation Properties**

Relation name \* company  
▲ For internal use

Parent Attribute \* You register as

Attribute Options \*  
Company  
Individual

Dependent Attributes \*  
Company name  
Number of employees  
How did you find us?  
Please specify the other source  
Your position

**General**

**First please select the parent attribute.**

**Then choose to which attribute value the dependent attributes should be assigned, e.g. Company.**

**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.**





## 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 name \*

Your position

Number of employees

How did you find us? \*

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.

<span style="float: right;">+ Add New Customer</span>					
<span>Export to: CSV</span> <span>Export</span> <span>Reset Filter</span> <span>Search</span>					
<span>Actions</span> <span>Submit</span>					
		Company name	Number of employees	Your position	How did you find us?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
To:	<input type="text"/>				
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

 [Create New Order](#)

 [Back](#)

Please Select a Customer

 [Create New Customer](#)

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

[Reset Filter](#)

[Search](#)

ID ↓	Name	Email	Telephone	ZIP/Post Code	Country	Signed Up From	What are your favorite colors?
					All Cou ↓		
8	Percy Backson	percy@example.com				English	
7	Steve Linedosas	steve@example.com	444444444444	55555	United States	English	Black, Red
6	Danny Steanos	exam@example.com	phone	code	United States	English	Black, Grey
1	John Doe	john.doe@example.com				English	Black

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.




User Guide: [Customer Attributes](#)

Support: <http://amasty.com/contacts/>

Page 19

# 9. Customer attributes on order grid

You can also see customer attributes on your order grid. On each order you will see the additional information about the customer who made this purchase.

 **Orders** [+ Create New Order](#)

Page  of 1 pages | View  per page | Total 2 records found | [New Order RSS](#) | [Export to](#)  [Export](#) [Reset Filter](#) [Search](#)

[Select Visible](#) | [Unselect Visible](#) | 0 items selected | [Actions](#)  [Submit](#)

	Order #	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	What is your favourite color?	Status	Action
Any	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	100000002	Dec 22, 2012 12:41:49 AM	Jack Black	Jack Black	\$8.00	\$8.00	Black, Grey	Pending	<a href="#">View</a>
<input type="checkbox"/>	100000001	Dec 13, 2012 4:55:28 AM	Dimon Smilo	Dimon Smilo	\$8.00	\$8.00	Black, Red	Complete	<a href="#">View</a>



# 10. Customer attributes: Reports

Dashboard Sales Catalog Mobile Customers Promotions Newsletter

**Reports**

Page 1 of 1 pages | View 20 per page

Reset Filter Search

Manage Customers  
Customer Attributes  
Customer Group  
Online Customer  
Manage Attributes  
Manage Relations  
Reports

To see Customer attributes reports please go to Customers > Customer Attributes > Reports

Code	Label	Type
are_you_hired	Are you hired at the moment?	Yes/No
company_name	Name of the company	Text Field
company_specialization	Company specialization	Text Area
customer_group	Customer group	Dropdown
date_of_birth	Date of birth	Date
fav_color	What is your favorite color?	Multiple Select
how_did_you_find_us	How did you find us?	Multiple Select
position_in_the_company	What is your position in the company?	Text Field
register_as	You register as	Dropdown

Click on one of the attributes in the list to see the report.

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



# 10. Customer attributes: Reports

Dashboard

Sales

Catalog

Mobile

Customers

Promotions

Newsletter

CMS

Reports

System

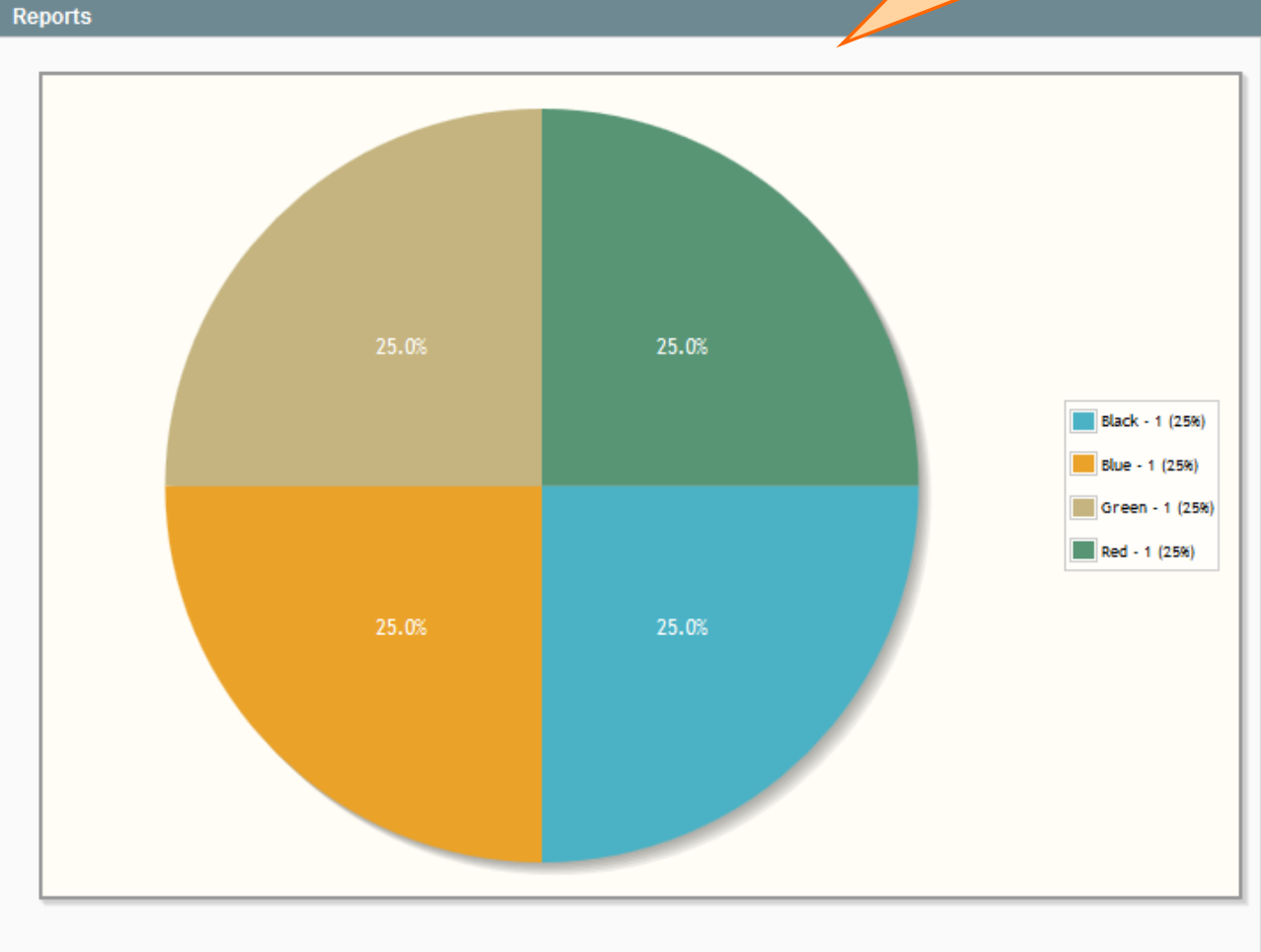
Get help for this page

## Reports

Reports

View Report for Attribute "What is your favorite color?"

See the report example based on favorite color attribute.



## 11. Customer attributes for backend orders


You register as \*

Are you hired at the moment? \*

What is your position in the company?

How did you find us? \*

- Facebook
- Google
- Newspaper
- Recommendation
- TV-ad

Date of birth  

What is your favorite color? \*

- Black
- Blue
- Green
- Red
- Yellow

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.

Current Configuration Scope:  
Default Config

**Configuration**

- AMASTY EXTENSIONS
- Extensions Store
- Extensions & Notifications
- Customer Attributes**
- Demo Tooltips

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.)

### Customer Attributes

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

Save Config

**General Settings**

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

Login Settings

Forgot Password Settings

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

Login Settings

Forgot Password Settings



## Create an Account

### Personal Information

First Name \*

Last Name \*

Email Address \*

Sign Up for Newsletter

### Address Information

Company

Telephone \*

Street Address \*

City \*

State/Province

Zip/Postal Code \*

Country \*

Here is the example of enabled address information fields on the account creation page.

### Login Information

Password \*

Confirm Password \*



# 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).

Setting	Value	Scope
Use For Customer Login	- Magento Default (E-mail) -	[GLOBAL]
Disable Email Login	No	[GLOBAL]
Modify Field Title On The Login Page	Yes	[GLOBAL]

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.



Current Configuration Scope:  
Default Config

**Configuration**

**AMASTY EXTENSIONS**

- Extensions Store
- Extensions & Notifications
- Customer Attributes**
- Demo Tooltips

When you set this option to "Yes" customers will be able to recover the password only with the specified attribute.

## Customer Attributes

Save Config

<b>General Settings</b>	
<b>Login Settings</b>	
<b>Forgot Password Settings</b>	
Use for forgot password	<input type="text" value="- Magento Default (E-mail) -"/> [STORE VIEW] <small>▲ The attribute chosen here will be used for forgot password together with or instead of email.</small>
Field Title	<input type="text"/> [STORE VIEW] <small>▲ If leave empty, then will be used the 'Email Address' title.</small>
Disable email for forgot password	<input type="text" value="No"/> [GLOBAL] <small>▲ 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.</small>
Text	<input type="text"/> [STORE VIEW] <small>▲ If leave empty, then will be used standard text.</small>

Specify the attribute that will be used by customers together with or instead of email



# 15. Customer Account Activation Settings

Customer Account Activation Settings	
New Customers Require Activation	<input type="checkbox"/> Yes ▲ All new customers will be not activated after registration.
Notify Admin on New Registration	<input type="checkbox"/> Yes ▲ Site Administrator will retrieve a email after every new registration.
Admin Email Address	<input type="text" value="support@example.com, sales@example.com"/> [STORE VIEW] ▲ Site Administrator email type right here (more than one separated by comma).
Admin Notification Email Sender	<input type="text" value="General Contact"/> [STORE VIEW]
Admin Notification Email Template	<input type="text" value="New account notification for admin (Default Ter"/> [STORE VIEW] ▲ Specify email template for notification letters.
Notify Customer Upon Activation	<input type="checkbox"/> Yes ▲ Choose 'Yes' if you want send emails to customer after profile activation.
Customer Notification Email Sender	<input type="text" value="General Contact"/> [STORE VIEW]
Customer Notification E-mail Template	<input type="text" value="Customer activation notification (Default Templ"/> [STORE VIEW] ▲ Specify email template for notification letters to users upon activation.
Activation Note	<input type="text" value="Your account is not activated yet"/> ▲ Notification text to display to customer after registration.

**Set this option to “Yes” to manually activate the accounts of newly registered customers.**

**Set this option to “Yes” to get email notifications of every new customer registration.**

**Specify the emails (separated by comma) where customer registration notifications will be sent to.**

**Set this option to “Yes” to send email notifications of account activation to new customers.**

**If admin hasn’t activated account, customer sees this note when trying to log in or check out.**



# 15. Customer Account Activation Settings

Customer Notification E-mail Template	<input type="text" value="Customer activation notification (Default Template)"/>	[STORE VIEW]
	<small>▲ Specify email template for notification letters to users upon activation.</small>	
Activation Note	<input type="text" value="Your account is not activated yet"/>	[STORE VIEW]
	<small>▲ Notification text to display to customer after registration.</small>	
Activate New Customers Automatically	<input type="text" value="Yes"/>	[STORE VIEW]
	<small>▲ This option will activate new customers automatically and apply all options above.</small>	
Activation by Customer Group	<input type="text" value="Yes"/>	
Customer Groups	<ul style="list-style-type: none"><li>General</li><li>Wholesale</li><li>Retailer</li></ul>	

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

Choose customer groups for which account approval will be automatic.

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.**



# 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.

## New Email Template

Back

Reset

Convert to Plain Text

Preview Template

Save Template

### Load default template

Template \*

Customer activation notification

Locale \*

English (United States)

Load Template

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.

### Template Information

Used as Default For

System -> [Configuration](#) -> [Customer Attributes](#) -> Customer Account Activation Settings -> Customer Notification E-mail Template (GLOBAL)

Template Name \*

Template Subject \*

Account confirmed for {{var customer\_name}}

Insert Variable...

Template Content \*

```
<body style="background:#F6F6F6; font-family:Verdana, Arial, Helvetica, sans-serif; font-size:12px; margin:0; padding:0;">
```



# 16. Customer Account Activation

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

Dashboard Sales Catalog **Customers** Promotions Newsletter CMS System [Get help for this page](#)

**Manage Customers** [Add New Customer](#)

Page 1 of 1 pages | View 20 per page | Total 3 records found

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

Export Reset Filter Search

Actions Submit

	ID	Name	Email	Group	Country	State/Province	Customer Since		Action
Any	From:				All Countries		From:		
	To:						To:		
<input checked="" type="checkbox"/>	3	Ray Allen	reww@example.com	General	United States	Florida	Aug 21, 2014 AM	Website	Pending <a href="#">Edit</a>
<input checked="" type="checkbox"/>	2	Eva Brown	eva88@example.com	General	United States	Alabama	Aug 14, 2014 10:08:26 AM	Main Website	Pending <a href="#">Edit</a>
<input type="checkbox"/>	1	John Doe	john.doe@gmail.com	General	United States	Iowa	Aug 30, 2007 4:23:13 PM	Main Website	Pending <a href="#">Edit</a>

Tick off the customers which need to be activated.

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





# 17. Customer attributes on registration page

## 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 \*

Date of birth

Test Note

What is your favorite color? \*

 Black  Blue  Green  Red

White  Yellow

How did you find us? \*

Please, upload your photo

No file chosen

Terms and conditions

Please read these Terms and Conditions of use carefully before using or obtaining any materials, information, products or services through example.com. By accessing example.com, you

An example of block with custom attributes at the registration page.



## 18. Attributes on billing information page

<b>City *</b>	<input type="text"/>	<b>State/Province *</b>	<input type="text" value="Please select region, state or province"/>
<b>Zip/Postal Code *</b>	<input type="text"/>	<b>Country *</b>	<input type="text" value="United States"/>
<b>Telephone *</b>	<input type="text"/>	<b>Fax</b>	<input type="text"/>
<b>Birthdate</b>	<input type="text"/>		
<b>How did you find us?</b>	<input type="text" value="Google"/>		
<b>VAT number *</b>	<input type="text" value="admin"/>		
<b>What are your favorite colors?</b>			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Password *</b>	<input type="password"/>	<b>Confirm Password *</b>	<input type="password"/>

An example of the attributes at the Billing Information page of checkout.



# 19. Customer Attributes in customer account

### MY ACCOUNT

- Account Dashboard
- Account Information**
- Address Book
- My Orders
- Billing Agreements
- Recurring Profiles
- My Product Reviews
- My Tags
- My Wishlist
- My Downloadable Products
- Newsletter Subscriptions

### MY CART

You have no items in your shopping cart.

### COMPARE PRODUCTS

You have no items to compare.

### MY ORDERS

**Last Ordered Items**

- [HTC Touch Diamond](#)

[View All](#) [Add to Cart](#)

## Edit Account Information


#### Account Information


**First Name \***  **Last Name \***

**Email Address \***

**Change Password**




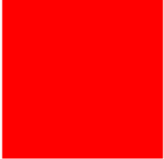
#### Additional Information

**Birthdate**  

**How did you find us?**  

**VAT number \***

**What are your favorite colors?**

<input checked="" type="checkbox"/> 	<input type="checkbox"/> 
<input checked="" type="checkbox"/> Black	<input type="checkbox"/> Green
<input checked="" type="checkbox"/> 	<input type="checkbox"/> 
<input checked="" type="checkbox"/> Grey	<input type="checkbox"/> Red

Customers can edit the values they've entered in their account.



# 20. Customer Attributes in admin panel

## Customer Information

Customer View

### Account Information

Addresses

Orders

Billing Agreements

Recurring Profiles (beta)

Shopping Cart

Wishlist

Newsletter

Product Reviews

Product Tags



Danny Steanos

Back

Reset

Create Order

Delete Customer

Save Customer

Save and Continue Edit

### Account Information

Associate to Website \*

Main Website

Created From

English

Customer Group \*

General

Birthdate

8/7/81

Comments

Empty text area for comments.

What are your favorite colors?

Color selection list with options: Black, Green, Grey, Red. Black and Grey are selected.

How did you find us?

Google

VAT number \*

78974477778555

Admin can edit values entered by customers from admin panel.



## 20. Customer Attributes in admin panel

**New Customer** Tax/VAT number

Gender

Birthdate

Comments

What are your favorite colors?

- Black
- Green
- Grey
- Red

How did you find us?

Username \*

VAT number \*

Send Welcome Email

Send From

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



## 21. How to add attributes to customer-related emails

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!

