

Customer Attributes

for Magento 2



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Introducing Customer Attributes for Magento 2

Magento 2 Customer Attributes extends the list of built-in Magento customer attributes and customer address attributes, and further facilitates their meaningful utilization via various options for display as well as for integration with Aheadworks and native Magento modules. Alongside adding new attributes merchants are able to manage the existing ones to fully respond to their business needs.

Compatibility: Magento Open Source 2.3.X.

Getting Around

Business Advantages

The Magento 2 Customer Attributes is an extension for perfect merchants who are willing to understand their particular customers, and get a hold of their individual and clear-cut needs. The module allows getting customer profiles as complete as required, enriching them with data from new or edited customer and customer address attributes. It works on the front as well as backend, and enables both merchants and customers pumping a Magento store with necessary information, due configuration provided. Moreover, a few built-in options for integrations further extend the functionality of the module to realize a variety of use-cases and address urgent business needs.

What Makes It Different

- Extensive list of properties to configure meaningful attributes;
- Data validation and input values verification;
- Dependable and 'hidden' attributes;
- Placement of attributes on the storefront and/or backend;
- Checkout and Customer Segmentation integration.

Customer Attributes Use

The extension does not have any particular settings for operation but for the configuration of customer attributes themselves. The frontend use of the created/edited attributes does not differ from utilization of any other common types of input fields, which are universally known. Therefore, the present manual focuses on the backend use of customer attributes and customer address attributes, with occasional examples of display on the storefront when need be.

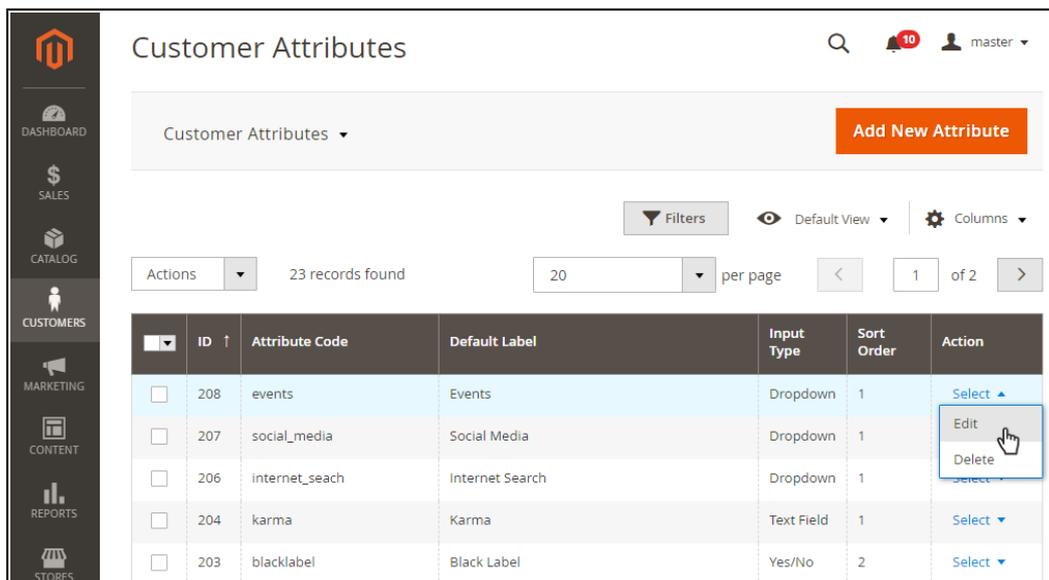
Customizing Attributes

Customer Attributes Grid

To get access to all customer attributes in the store please proceed to **Customers > Customer Attributes**. The page show a grid of the following columns:

- **ID** - the identification number of the attribute;
- **Attribute Code** - the alphanumeric code of the attribute;
- **Default Label** - the descriptive label of the attribute;
- **Input Type** - the type of the input;
- **Sort Order** - the numeric value to sort the attribute against other attributes in the related form/view;
- **Action** - an active link 'Select' with two options: Edit and Delete.

You can delete attributes individually with help of the **Select** active link or in bulk with help of the **Actions** drop box field on the top left above the grid. Editing is only possible for each individual attribute.



ID	Attribute Code	Default Label	Input Type	Sort Order	Action
208	events	Events	Dropdown	1	Select
207	social_media	Social Media	Dropdown	1	Select
206	internet_search	Internet Search	Dropdown	1	Select
204	karma	Karma	Text Field	1	Select
203	blacklabel	Black Label	Yes/No	2	Select

Create / Edit Attributes

To create a new attribute click the **Add New Attribute** button on the top right of the page. The **Edit Attribute** page looks the same as the **New Attribute** page, but for the Attribute Code, Input Type and Values Required properties blocked.

Configuring attribute properties

The **Attribute Properties** section contains essential parameters for customization of an attribute, mainly:

- **Default Label** - the descriptive label of the attribute;
- **Attribute Code** - the alphanumeric code of the attribute;
- **Input Type** - the type of the input value (Text field, text area, date, Yes/No, Multiple select, Dropdown, File, Image);
- **Values Required** - Yes/No alternatives (the attribute will be marked with an asterisk (*) in the view);
- **Add to Column Options in the Customers Grid** - Yes/No alternatives;
- **Use in Filter Options in the Customers Grid** - Yes/No alternatives;
- **Use in Search Options in the Customers Grid** - Yes/No alternatives;
- **Use in the Orders Grid** - Yes/No alternatives;
- **Show on the Order View Page** - Yes/No alternatives.

Properties set-up depends on the business concept and application needs of each unique attribute, and therefore cannot be advised herein but for some sample use-cases.

The screenshot displays the 'New Attribute' configuration interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'New Attribute' and includes a top navigation bar with 'Back', 'Delete', 'Reset', and 'Save' buttons. Below this is the 'Attribute Properties' section, which contains several fields and dropdown menus:

- Default Label ***: A text input field containing 'How did you hear about us?'
- Attribute Code ***: A text input field containing 'how_heard'.
- Input Type**: A dropdown menu currently set to 'Dropdown'. A red box highlights this dropdown, and an arrow points to its expanded menu, which lists: 'Dropdown', 'Text Field', 'Text Area', 'Date', 'Yes/No', 'Multiple Select', 'Dropdown' (highlighted in blue), 'File (attachment)', and 'Image File'.
- Values Required [website]**: A dropdown menu set to 'Yes'.
- Add to Column Options in the Customers Grid**: A dropdown menu set to 'Yes'.
- Use in Filter Options in the Customers Grid**: A dropdown menu set to 'Yes'.
- Use in Search Options in the Customers Grid**: A dropdown menu set to 'Yes'.
- Use in the Orders Grid**: A dropdown menu set to 'Yes'.
- Show on the Order View Page**: A dropdown menu set to 'Yes'.

Selecting an input type opens up extra properties for configuration of the attribute, for example:

- **Text Area** - Input Validation and Default Value;
- **Text Field** - Input Validation, Default Value and Input/Output filter;
- **Date** - Input Validation and Default Value, Input/Output filter, Minimum Value, Maximum Value;
- **Yes/No** - Default Value;
- **File Attachment** - Maximum File Size and File Extensions;
- **Image File** - Maximum File Size, Maximum Image width and Maximum Image Height.

On checkout, file upload is not supported neither for customers (on frontend) nor the admin (in backend). Thereby, attributes with input types **File Attachment** and **Image File** though displayed will not function properly.

Below is the description of the extra properties:

- **Input Validation** - validates the input value of the attribute against the following types: None, Alphanumeric, Alphanumeric With Spaces, Numeric Only, Alpha Only, URL, Email, Length Only;
- **Input/Output filter** - filters out html tags and html entities from the input value of the attribute against the following criteria: None, Strip HTML Tags, Escape HTML Entities;
- **Default Value** - the input value of the attribute by default as shown on the storefront;
- **Minimum/Maximum text length** - the numeric value correspondent to the required number of letters in the text;
- **Minimum/Maximum Value** - data values setting down the desired period for the attribute input;
- **Maximum File Size** - the maximum size of the file attribute in bytes;
- **File Extensions** - a list of common/custom file extensions separated with comma (,);
- **Maximum Image Width/Height** - the maximum values of the width/height of the image file attribute in pixels.

Configuring storefront view properties

The Storefront Properties section contains three parameters for customization of view of the attribute, mainly:

- **Show on storefront** - Yes/No alternative.
- **Sort Order** - numeric value to set the placement of the attribute in the form/view with regard to other attributes on this form/view;
- **Display on Forms** - a list of forms to host the attribute: Customer Registration, Customer Account Edit and Admin Checkout.

The screenshot shows the 'Edit Attribute' form. The 'Storefront Properties' section includes a dropdown for 'Show on Storefront [website]' (set to 'Yes'), a text input for 'Sort Order' (value: 3), and a dropdown for 'Display on Forms' (options: Customer Registration, Customer Account Edit, Admin Checkout). The 'Manage Labels / Options' section features a table with columns 'Store View' and 'Label *'. A row is present with 'Default Store View' and 'How did you hear about us?'. An 'Add' button is located below the table.

You may be the only user of the newly-created/edited attributes, or you may let customers submit some more information about themselves too. In the former case, **to create attributes for internal use** ('secret' or 'hidden') select 'No' in **Show on Storefront**, otherwise opt for 'Yes'. This will make the attribute available on the storefront.

The **Admin Checkout** form is available only on the backend, whereas the other two are show both on the front and backend. You may select more than one form for display.

Managing Labels / Options

The **Manage Labels / Options** section is divided into two parts: Options and Labels.

- **Manage Labels** prompts you to choose the store view and label the attribute. To add more views click the Add button below the correspondent field. To delete the entry click the bin icon next to the correspondent row.

Should you have opted for an internal use of the attribute, do not add any entries here.

- **Manage Options** suggests indicating further values for the attributes of the input types Dropdown, Multiple Select. This block will not be available should other input types be selected.

Edit Attribute ← Back Delete Reset Save

Manage Labels / Options

Manage Labels

Store View	Label *
Default Store View	How did you hear about us?

Add

Manage Options

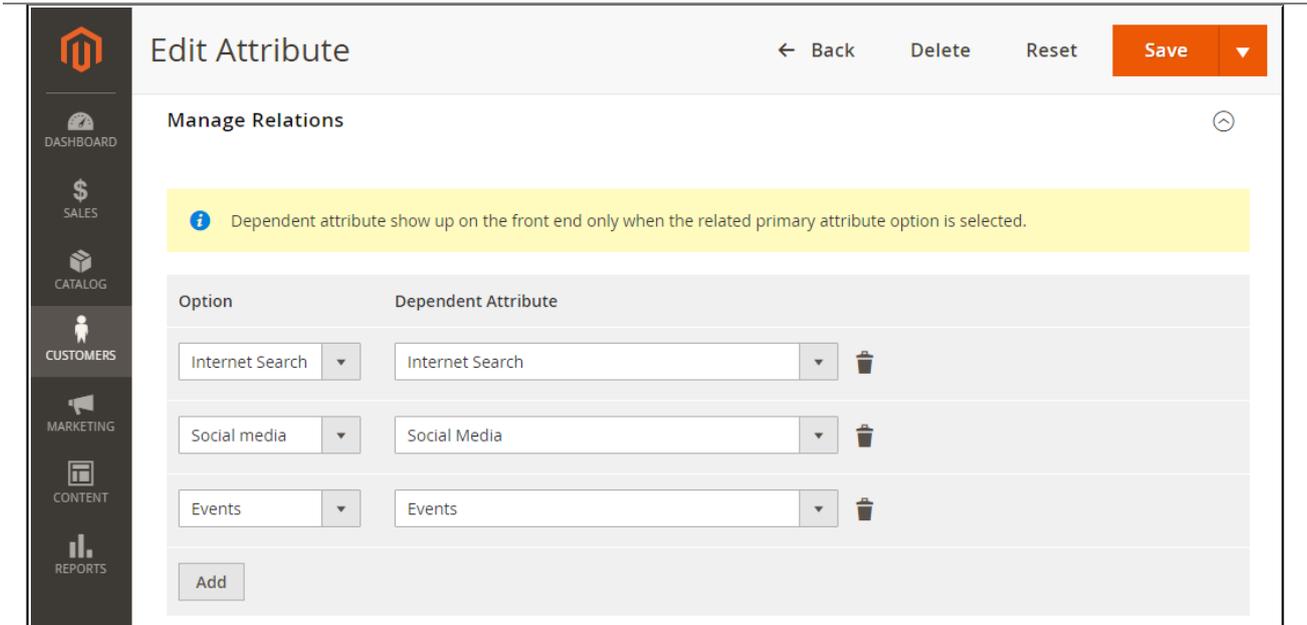
Is Default	Admin *	Default Store View
<input checked="" type="radio"/>	Internet Search	Internet search
<input type="radio"/>	Social media	Social media
<input type="radio"/>	Events	Events
<input type="radio"/>	Printed ads	Printed ads
<input type="radio"/>	Friends	Friend's advice

Add

Managing Relations

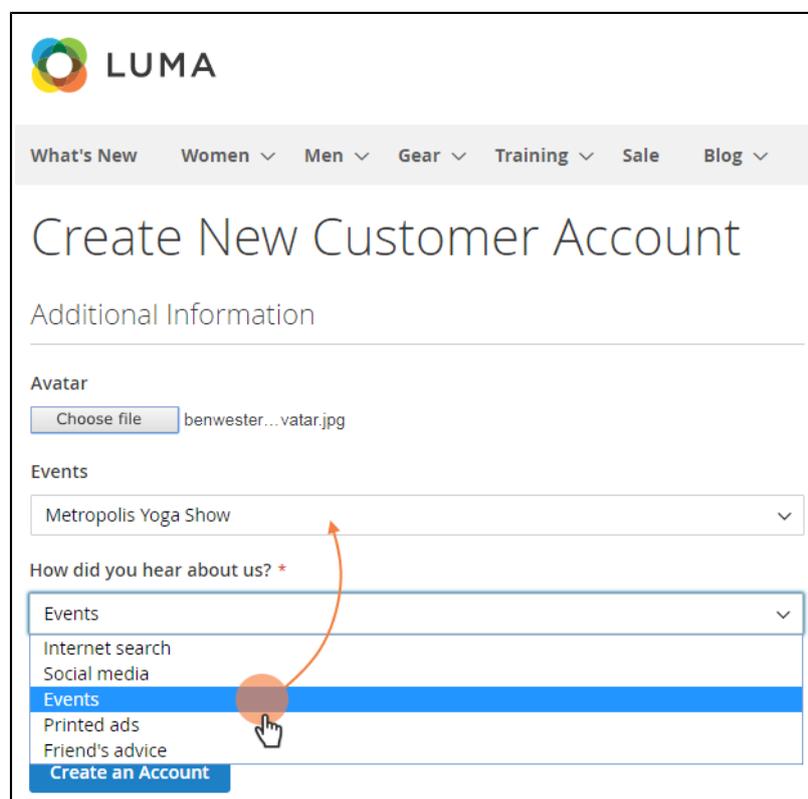
The Manage Relations allows connecting the given attribute to the dependent ones, if any.

The block is available for the **Yes/No** and **Dropdown** only. It becomes active once the previous three sections have been completed and the attribute has been saved.



Make sure you have created dependent attributes first to see them in the **Dependent Attribute** field as alternatives for choice. The Option field shows the options for dropdown (Yes or No, in case of the Yes/No type) as indicated on the previous step.

In the example above there have been created three dependent attributes for a multi-tier dropdown box: '**Internet Search**', '**Social Media**' and '**Events**'. At their lower tier they correspond to the options (of the same names) in the upper-tier within the attribute '**How did you hear about us**'. The dependent attributes each have their own options for further dropdown. Once the relations between the attributes are settled, this is what you will have in the end (storefront view):

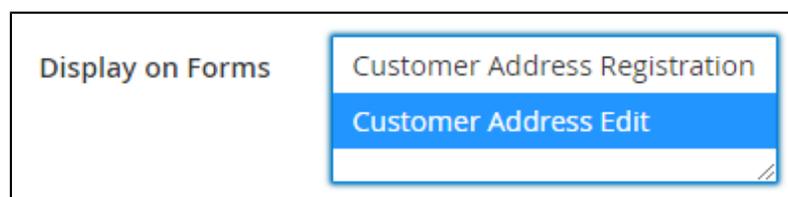


Customer Address Attributes Grid and Pages

To get access to all customer address attributes in the store please proceed to **Customers > Customer Address Attributes**. The reason behind the two groups of attributes available in the extension lies in the compliance with the native Magento architecture of frontend forms and algorithms of collecting and storing relevant attributes which split the attributes this way. The Customer Attributes and Customer Address Attributes pages look the same.

The **Edit/New Address Attributes** pages are similar to the described above pages for customer attributes with the only two differences:

- The properties **Use in the Orders Grid** and **Show on the Order View Page** for logical reasons are not available;
- The **Display Forms** property has two parameters for choice: Customer Address Registration and Customer Address Edit.



If you want to have new attributes visible on the **Checkout form on the front** use the Customer Address type.

The **Customer Address Registration** form is displayed both on registration of a new customer and on checkout for a guest.

The **Customer Address Edit** is shown on the Customer Account page.

Customer attributes assigned to the Customer Address Registration form can also appear on the Customer Account page on the storefront, but only on addition of a new address.

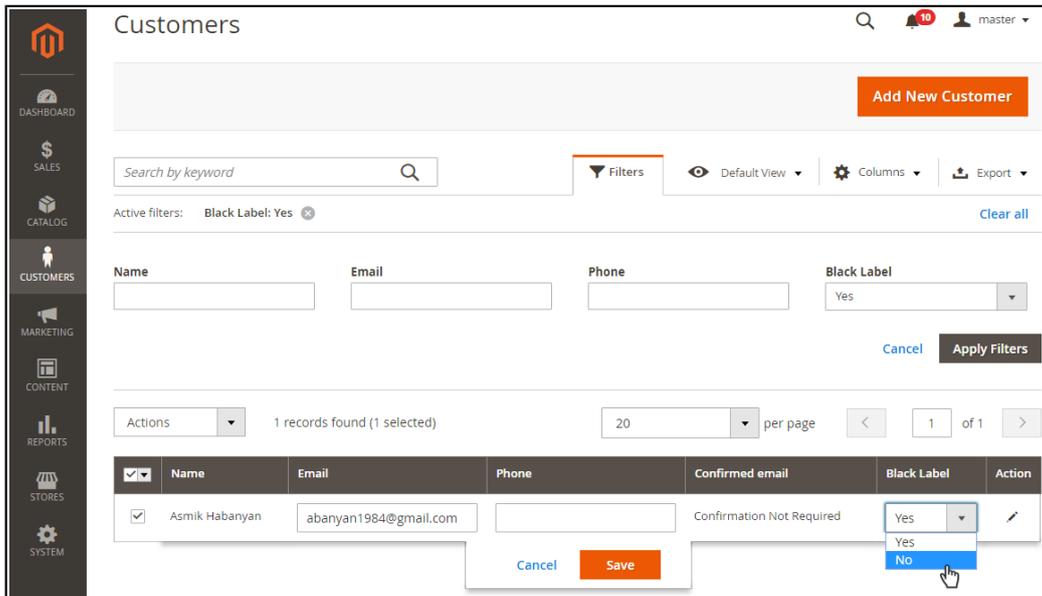
Attributes in Action

Display in the Customers and Orders Grid

Should due properties be set-up on New/Edit Attribute page the attributes will be available in the Customers and/or Orders grids. You will then be able to browse them in the grids and use as options for columns layout, filtering or search.

To get access to the information on all customers in the store please proceed to **Customers > All Customers**. In the example below you may see that the entries in the grid

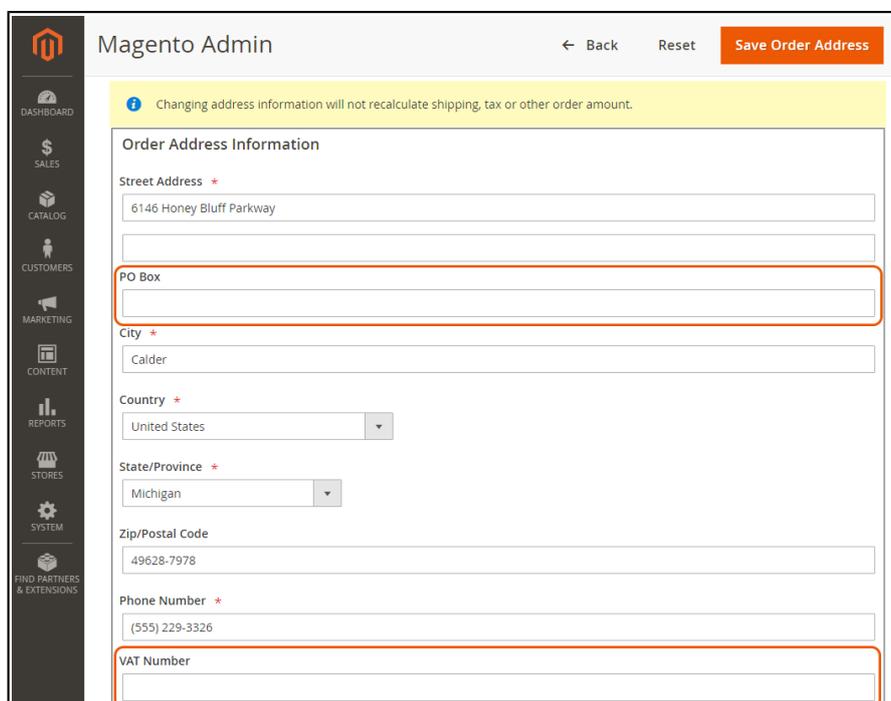
were **filtered** against the custom attribute **Black Label**, the values of which you may see/edit in the grid too.



Display on the Orders View Page

Should due properties be set-up on New/Edit Attribute page the attributes will be available in the Customers and/or Orders grids. You will then be able to browse and edit them, for example on the Admin Checkout Page.

To get access to the Orders View pages please proceed to **Sales > Orders**, pick up an order and click on the correspondent row for editing. In the example below you may see the Admin page for **Order Address Information** with two custom fields available **PO Box** and **VAT Number**.



Display in email templates

To display custom attribute in email template use following line:

```
{{layout handle="aw_customer_attributes_email" customer=$customer attribute_code="attribute_code"}}
```

where

\$customer - customer object in email template, if available;

attribute_code - code of the custom attribute.

Integration with Customer Segmentation

Newly created attributes become available in scope of all store attributes for rule-making in the [Customer Segmentation](#) extension. In the example below you may see a rule for segmentation conditioned against the two custom attributes 'How did you hear about us?' and 'Social Media'. The rule segments customers who got to know the shop via Facebook.

The screenshot shows the 'New Segment' configuration interface. The 'Segment Name' field contains 'Heard on Facebook'. The 'Description' field contains 'Customers who got to know the shop via Facebook.' The 'Assigned to Website/Store view' dropdown menu is open, showing options: 'All Store Views', 'Main Website', 'Main Website Store' (selected), and 'Default Store View'. Below the form, there is a section for conditions: 'Apply the rule only if the following conditions are met (leave blank for all customers)'. Under the heading 'If ALL of these conditions are TRUE:', there are two conditions: 'How did you hear about us? * is Social media' and 'Social Media * is Facebook'. The page includes a sidebar with navigation icons and a top navigation bar with 'Back', 'Reset', and 'Save' buttons.

For an in-depth look visit Customer Attributes demo store at the extension's product page.

Feel free to contact our support team with any questions:

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