

amasty

Guide for Customer Attributes for Magento 2

Display additional attribute fields on the registration page to collect important customer data. Create customer attributes of various types to effectively gather as much information as you need.

- Show extra attributes of different input types
- Manage customer attributes from the admin panel
- Effectively process collected customer data
- Use additional attributes in email templates
- Generate handy attribute usage reports

General Settings

To configure general extension settings please go to **Stores** → **Configuration** → **Customer Attributes**.

Save Config

General Settings

Display customer attributes on the "select customer" grid [website] Yes

This applies to the customers grid which is used to select a customer during order creation at the backend

Allow customers to change their group [website] Yes

Display Customer Attributes on the 'selected customer' grid - Please set this option to 'Yes' to see the attributes when you select a customer during order creation from the backend.

Allow customers to change their group - This option lets customers choose and change their customer group. To make the option work please create customer attribute of 'Customer Group

Selector' input type.

Attribute Creation

To create a new attribute please go to **Customers → Customer Attributes → Manage Attributes**. On this grid, you can add the new attributes and edit the already created ones. To add an attribute, please click the **Add New Attribute** button.

Customer Attributes

Search [Reset Filter](#) 5 records found

Code	Label	Type	Sorting Order	Show on the Customers Grid	Show on the Orders Grid	Show on the Order View page
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
affiliate_program	Would you like to join an affiliate program?	Yes/No	4	Yes	Yes	Yes
company_name	What is your company name?	Text Field	2	Yes	Yes	Yes
company_position	Your position in the company	Text Field	3	Yes	Yes	Yes
customer_group	Choose your customer group	Dropdown	1	Yes	Yes	Yes

Attribute Configuration

Attribute Properties

Default label *

Attribute Code *
For internal use. Must be unique with no spaces

Store View *

Main Website

Main Website Store

Default Store View

Catalog Input Type for Store Owner

Text Field

- 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

Default value

Values Required

Input Validation

Default Label/ Attribute Code - Specify an attribute label and a code. The code will be used only for internal needs.

Store View - Select the store view for which the attribute will be available.

Catalog Input Type for Store Owner - choose among various input types depending on your specific needs. Please note that the following fields depend on the selected input type.

NOTE: after the attribute code and the catalog input type are specified and saved they can't be

changed.

Catalog Input Type for Store Owner	Text Field
Default value	Sales Manager
Values Required	Yes
Input Validation	<div style="border: 1px solid black; padding: 2px;"> None </div> <ul style="list-style-type: none"> None Decimal Number Integer Number Email URL Letters Letters (a-z, A-Z) or Numbers (0-9) CNPJ Validation CPF Validation Nickname validation Royalty Card Number RUT code validation
Attribute Configuration	
Show on the Customers Grid	
Show on the Orders Grid	
Show on the Order View page	No
In the Account Information block at the Backend	

Default Value - Specify the value which will be preselected by default if necessary.

Values Required - If the option is set to 'yes' customers won't be able to leave this attribute field blank while getting registered.

Input Validation - Specify the type of input validation.

CNPJ Validation - a [taxpayer identification](#) number for Brazilian companies. **CPF Validation** - an [individual number](#) in Brazil. **RUT code validation** - a [taxpayer identification number](#) in Chile. Select pages on which the attribute will be displayed. Specify attribute display order.

Attribute Configuration

Show on the Customers Grid	<input type="text" value="Yes"/> <input type="button" value="▼"/>
Show on the Orders Grid	<input type="text" value="Yes"/> <input type="button" value="▼"/>
Show on the Order View page	<input type="text" value="Yes"/> <input type="button" value="▼"/> In the Account Information block at the Backend
Show on the Account Information page	<input type="text" value="Yes"/> <input type="button" value="▼"/> On the Frontend
Hide if Filled	<input type="text" value="Yes"/> <input type="button" value="▼"/> On the Account Information page on the Frontend
Show on the Shipping page	<input type="text" value="Yes"/> <input type="button" value="▼"/> During Checkout
Hide if Filled	<input type="text" value="Yes"/> <input type="button" value="▼"/> On the Billing page during Checkout
Show on the Registration page	<input type="text" value="Yes"/> <input type="button" value="▼"/>
Sorting Order	<input type="text" value="3"/> The order to display field on frontend

Please note that for the **Single File Upload** input type you can set the maximal file size value. However, this value should not exceed the limit set on your server. Make sure that you increased the limit on your web server before modifying the maximal file size in the extension settings.

Attribute Options Management

You can specify values only for selectable attributes.

[← Back](#) [Delete Attribute](#) [Save and Continue Edit](#) [Save Attribute](#)

Manage Titles (Size, Color, etc.) ⌵

Default Store View

Manage Options (values of your attribute)

Is Default	Default Store View	Admin	
<input checked="" type="radio"/>	<input type="text" value="Retailer"/>	<input type="text" value="Retailer"/>	Delete
<input type="radio"/>	<input type="text" value="Wholesale"/>	<input type="text" value="Wholesaler"/>	Delete
<input type="radio"/>	<input type="text" value="Distributor"/>	<input type="text" value="Distributor"/>	Delete

[Add Option](#)

Default Store View - Specify attribute title that will be visible on the frontend.

Manage Options - Create as many attribute values as you need, specify the value that will be preselected by default.

Choose **input types with images** (Multiple checkbox select with images, Single radio buttons select with images) to upload pictures for attribute values.

Manage Titles (Size, Color, etc.) ⌵

Default Store View

How did you find us?

Manage Options (values of your attribute)

Note. Please save attribute for uploading images.

	Default Store View	Admin	Icon Image	Remove Icon Image	
<input type="checkbox"/>	Facebook	Faceboo	 <input type="button" value="Browse..."/> No file selected.	<input type="checkbox"/>	<input type="button" value="Delete"/>
<input type="checkbox"/>	Instagran	Instagrai	 <input type="button" value="Browse..."/> No file selected.	<input type="checkbox"/>	<input type="button" value="Delete"/>
<input type="checkbox"/>	Pinterest	Pinteresi	 <input type="button" value="Browse..."/> No file selected.	<input type="checkbox"/>	<input type="button" value="Delete"/>

Attribute Relations Management

To manage attribute relations please go to **Customers** → **Customer Attributes** → **Manage Attribute Relations**.

Attribute Relation

admin

[Add New Relation](#)

Filters | Default View | Columns

1 records found

20 per page 1 of 1

Relation Name	Parent Attribute	Dependent Attributes	Attribute Codes	Action
Distributor	Choose your customer group	Would you like to join an affiliate program?, What is your company name?, Your position in the company	customer_group, affiliate_program, company_name, company_position	Edit

Attribute Relation - On the 'Attribute Relation' grid you'll see all created relations. It's possible to add an unlimited number of new relations and manage already created once.

Edit Relation "Distributors" 🔍 admin

← BackDelete RelationResetSave and Continue EditSave

Relation Information

Relation Name *
For internal use

Parent Attribute * ▼

Attribute Options *

Distributor

Retailer

Wholesaler

Dependent Attributes *

Would you like to join an affiliate program?

What is your company name?

Your position in the company

How did you find us

Relation Name - Specify a relation name that will be used for internal needs only.

Parent Attribute - Choose the attribute that will be parent.

Please, consider, that only these types of attributes can be used as the parent attributes.

- **Multiple Select**
- **Dropdown**
- **Multiple Checkbox Select with Images**

- **Single Radio Select with Images**

Attribute Options - Select attribute values that will trigger the display of dependent attributes.

Dependent Attributes - Specify which attributes will be dependent. These attributes will be displayed only if a customer selects one of the specified values of a parent attribute.

Dependent attributes are shown because the '**Distributor**' option is chosen. According to our settings 'Distributor' is the value of a parent attribute which triggers the display of dependent attributes.

Choose your customer group

Distributor

Your company name *

Best Flowers

Your position in the company *

Sales Manager

Would you like to join an affiliate program?

Yes

Attribute Display on the Backend

Show additional attributes on the Customers grid. Filter the list of shoppers using custom attributes. E.g. you can find out where customers see information about your store and fine tune your marketing strategy accordingly.

NOTE: Custom attributes will be also displayed on the 'Select Customer' grid when a store admin generates orders from the backend. Apart from that, you can display custom attributes on the order grid as well as on the order info page.

Account created	Date of Birth	Tax VAT Number	Gender	How did you find us	Choose your customer group	Your position in the company	What is your company name?	Would you like to join an affiliate program?	Action
Default Store View	Dec 15, 1973		Female	Facebook	Distributor	Brand Manager	TOyFactory	Yes	Edit
Default Store View			Male	Facebook	Retailer	CEO	Bright Solutions	No	Edit
Default Store View			Female	Instagram	Retailer	Sales Manager	Best Flowers	No	Edit

Show custom attributes on the **customer info page**. You can edit attributes for already existing customers and specify attribute values for new customers which you create from the admin panel.

Gender

Send Welcome Email From

How did you find us Facebook Instagram Pinterest

Choose your customer group

What is your company name? *

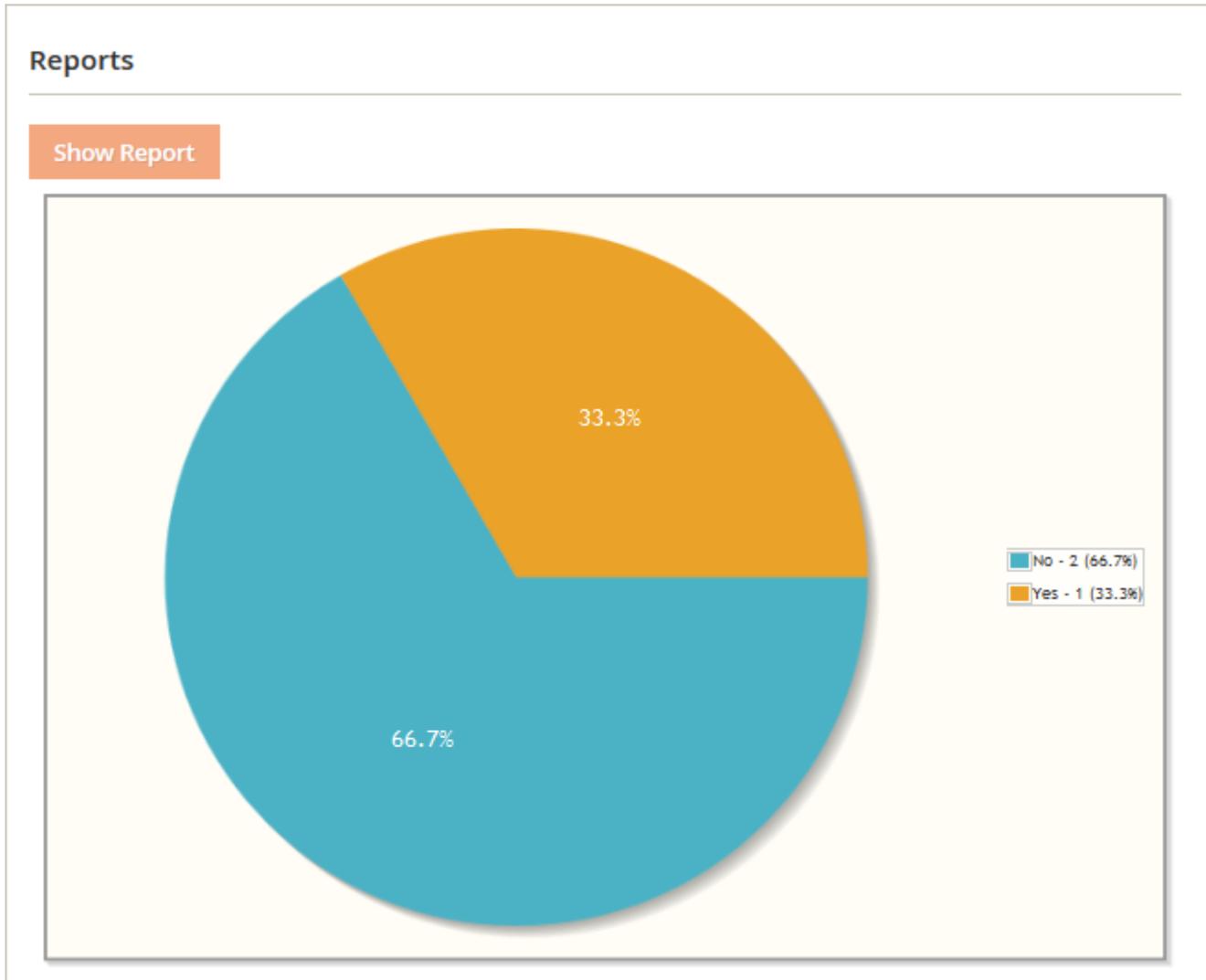
Your position in the company *

Would you like to join an affiliate program? Yes

Attribute Usage Reports

To see an attribute usage report please go to **Customers** → **Customer Attributes** → **Manage**

Attributes → open the necessary attribute and click on the Reports tab in the Attribute Information menu.



NOTE: reports are created only for selectable attributes such as checkboxes, multiple selects, dropdowns, yes/no and radio buttons.

Attribute Display on the Frontend

Show Extra Attributes on the **Checkout page**.

How did you find us?

Facebook Instagram Pinterest

Choose your customer group

Distributor ▼

Your company name *

Best Flowers

Your position in the company *

Sales Manager

Would you like to join an affiliate program?

Yes ▼

Display custom attributes on the **Registration page**.

First Name *

Last Name *
 Sign Up for Newsletter

Sign-in Information

Email *

Password *

Password Strength: Very Strong

Confirm Password *

Additional Settings

How did you find us



Facebook Instagram Pinterest

Choose your customer group

Create an Account

Also, the attributes can be viewed and edited from the customer's account. Take a look at the **Account Information** section to see the existing attributes.

Include Customer Attributes in E-mail

The extension is compatible with **Order Status extension for Magento 2**.

You can include customer attributes in your business e-mails, by inserting the special variable in your messages. Insert a customer attribute into the code:

If customer attribute is *profession*, for instance, insert the following in your letter:

```
{{var order.customer.getData('profession')}}`
```

or

```
{{var order.customer.getProfession()}}
```

You can include any custom attributes into any email template.

The extension is fully compatible with **Magento 2 PDF Customizer**. Use more customer attributes in your templates!

Attributes Import and Export

With the extension, you can include the created customer attributes into the default Magento import/export procedures.

Export

Export Settings

Entity Type

Export File Format

Fields Enclosure

Entity Attributes

26 records found

Exclude	Attribute Label	Attribute Code	Filter
<input type="checkbox"/>	Amasty attribute	amasty_attribute	<input type="text"/>
<input type="checkbox"/>	Is Confirmed	confirmation	<input type="text"/>
<input type="checkbox"/>	Created At	created_at	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>	Created From	created_in	<input type="text"/>
<input type="checkbox"/>	Default Billing Address	default_billing	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>	Default Shipping Address	default_shipping	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>	Disable Automatic Group Change Based on VAT ID	disable_auto_group_change	<input type="text"/>
<input type="checkbox"/>	Date of Birth	dob	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>	Email	email	<input type="text"/>

Please, go to **System** → **Export** and switch the **Entity Type** option to the **Customers Main File**. Below, in the **Entity Attributes** section you will see the created attributes that will exported together with the customers' data. Hit the **Continue** button.

Import

Check Data

Make sure your file isn't more than 2M.

Import Settings

Entity Type * Customers Main File [Download Sample File](#)

Import Behavior

Import Behavior * -- Please Select --

Stop on Error

Allowed Errors Count * 10

Please specify number of errors to halt import process

Field separator * .

Multiple value separator * .

Fields enclosure

File to Import

Select File to Import * [Choose File](#) No file chosen

Images File Directory

For Type "Local Server" use relative path to Magento installation, e.g. var/export, var/import, var/export/somedir

Proceed to the **System** → **Import** and choose the **Customers Main File** option from the **Entity Type** dropdown menu. Then, adjust the **Import Behavior** and choose the file to import customers with the custom attributes. Hit the **Check Data** button to proceed.

Find out how to install the **Customer Attributes** extension for Magento 2 via [Composer](#).

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