



Magento 2 Product Improvement Extensions

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User Guide



1. Overview

[Magento 2 Custom Option Template extension](#) helps you save time significantly by allowing you to create custom options templates then add to any product as you want.

2. How Does It Work?

Please go to Admin Panel ⇒ Catalog ⇒ Custom Options Template.

2.1 Custom Options Template Grid



Manage Custom Option Template

Search, Notifications (4), User: admin

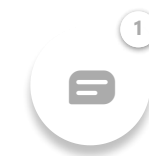
Add New Template

Filters, Default View, Columns

Actions, 5 records found, 20 per page, 1 of 1

<input type="checkbox"/>	ID	Title	Is Active	Description	Applied Product Qty ↑	Created At	Updated At	Action
<input type="checkbox"/>	1	women	Yes		1	Jun 3, 2020 9:28:48 PM	Jun 5, 2020 11:29:55 AM	Select
<input type="checkbox"/>	2	man	Yes		1	Jun 6, 2020 12:03:12 AM	Jun 9, 2020 4:00:25 PM	Select
<input type="checkbox"/>	3	gears	Yes		1	Jun 8, 2020 8:48:50 AM	Jun 8, 2020 2:30:21 PM	Select
<input type="checkbox"/>	6	Water Bottle	Yes	Water Bottle will have words written on	1	Jun 11, 2020 9:10:51 AM	Jun 11, 2020 9:10:51 AM	Select
<input type="checkbox"/>	4	All	Yes		0	Jun 8, 2020 10:14:27 AM	Jun 11, 2020 9:01:32 AM	Select

- In **ID** column: choose the ID of the template
- In **Title** column: choose the title of the custom option template
- In **Is Active** column: the status of the template. “Yes” means that the custom option is enabled in the frontend and “No” means that it is disabled.
- In **Description** column: description of the template
- In **Applied Product Qty** column: stated the number of products that have been applied to the displayed template.
- In **Create At** column: specific date and time that the custom options template was created.
- In **Update At** column: specific date and time of the last edition.
- In **Action** column: choose Edit to go to the custom options template edit page, or choose Delete to delete the template.



Note:

- Only count the products that are within the template apply rule, the product that isn't supported (E.g. Group products) won't be counted.
- the above information isn't displayed in the frontend.

2.2 Create Custom Option Template

Please click on **Add New Template** button to create new custom options template.

Manage Custom Option Template

Press this button to create new custom option template

Add New Template

Filters Default View Columns

Actions 2 records found 20 per page 1 of 1

<input type="checkbox"/>	ID ↓	Title	Description	Created At	Update At	Action	Is Active
<input type="checkbox"/>	1	Support and Service	The support options for downloadable products	Dec 21, 2017 4:34:52 PM	Jan 8, 2018 9:06:48 AM	Select ▾	Yes
<input type="checkbox"/>	4	Materials and Colors	The options of materials and colors for bags	Dec 21, 2017 6:05:39 PM	Jan 8, 2018 9:42:52 AM	Select ▾	Yes

2.2.1 CUSTOM OPTION TEMPLATE INFORMATION

In **Template Information** tab, you can edit the general information for the template.

New Custom Option Template

← Back Save and Continue Save

TEMPLATE INFORMATION

Template Information

Custom Option

Custom Option Template Information

Title * Bags

Is Active * Yes

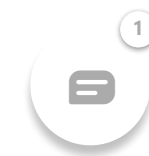
Description Custom Options for all bags in the website page.

Set conditions to assign custom option template to products

Applied Products (don't add conditions if rule is applied to all products):

If ALL of these conditions are TRUE:

- In **Title**, edit a title for the template.
- In **Is Active**, choose Yes to enable the template in the frontend, or No to disable it.
- In **Description**, edit the description for the template that is being created.



Applied Products (don't add conditions if rule is applied to all products) :

If ALL of these conditions are TRUE :



- In **Applied Products**: Add the right condition to apply the custom options template to products. Don't set any condition to apply the template to all products.

After assigning custom option template, the custom options are immediately inserted to the Customizable Options tab in each product edit page in the backend and they will be displayed in the frontend.

2.2.2 CREATE CUSTOM OPTIONS

To edit custom options of a template, please open Custom Option tab in Custom Option Template Edit page.

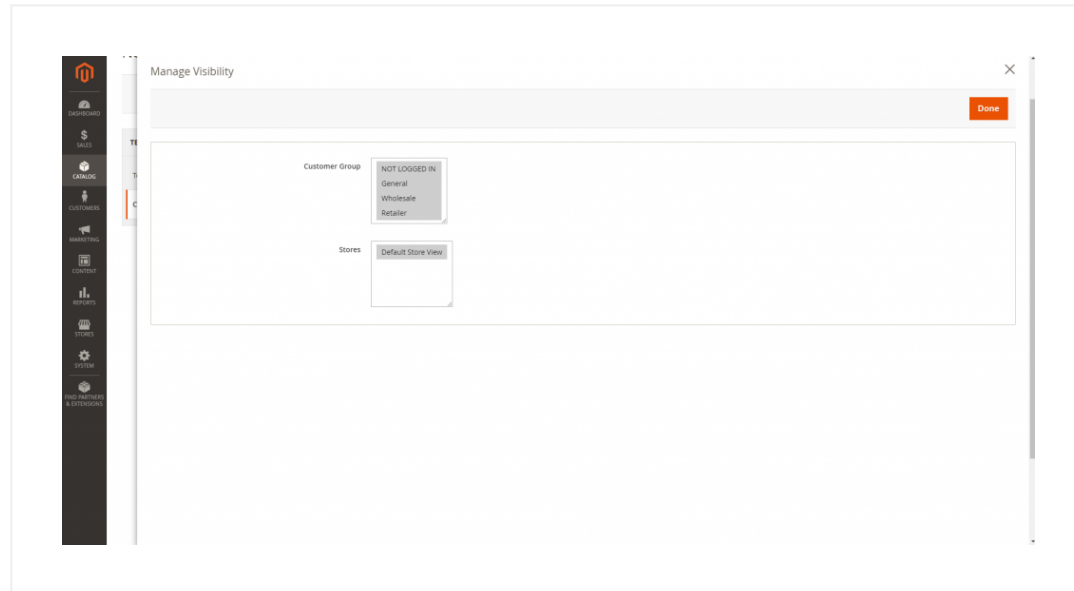


The screenshot shows the 'New Custom Option Template' page in Magento 2. On the left, there's a sidebar with 'TEMPLATE INFORMATION' and two tabs: 'Template Information' and 'Custom Option'. The main content area is titled 'Custom Options' and features a table with columns for 'Option Title', 'Price', and 'Price Type'. A dropdown menu for 'Input Type' is open, showing options like Radio Button, Text, File, Select, and Date. The 'Radio Button' option is selected. The interface includes navigation buttons like 'Back', 'Save and Continue', and 'Save'. At the bottom, there's a footer with 'Copyright © 2020 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.3.4'.

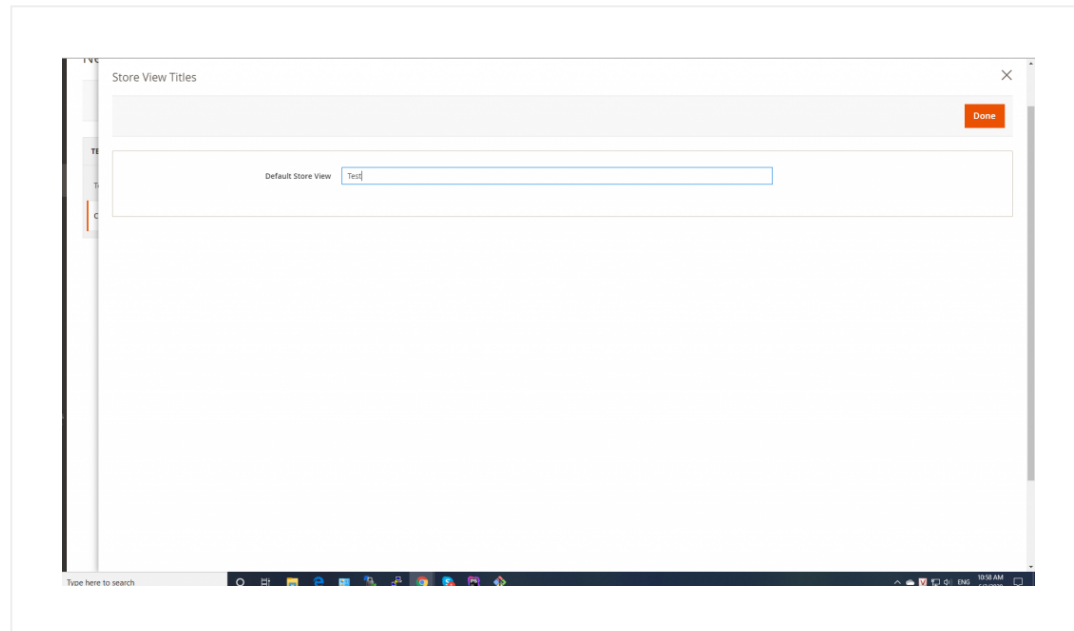
In this tab, you can create unlimited custom options by all input types. This section is the same as the Customizable Options tab in the product edit page.

You can click on the eye sign and choose the visibility for option with customer group and store view:





With the button next to the eye sign, you can set title store view for template:



You can also set default value for option type select:

The screenshot displays the 'Custom Options' configuration page in Magento 2. On the left, a sidebar shows 'TEMPLATE INFORMATION' with 'Template Information' and 'Custom Option' links. The main area is titled 'Custom Options' and contains two option configuration sections. The first section is for 'Waffle Colour' with an 'Option Title' of 'Waffle Colour' and an 'Input Type' of 'Radio Buttons'. It includes fields for 'Title', 'Price' (12.00), 'Price Type' (Fixed), 'SKU', 'Image', 'Search Image', 'Dependent Options' (option 4), and 'Is Default' (checked). The 'Is Default' checkbox is highlighted with a red box. The second section is for 'option 4' with an 'Option Title' of 'option 4' and an 'Input Type' of 'Field'. It includes fields for 'Price' (10), 'Price Type' (Fixed), 'SKU', and 'Max Characters'. Both sections have 'Add New Row' buttons.

After setting, you need to save to complete. There are 5 buttons for you to press:



Edit Custom Option Template 'storm_test'

← Back Delete Save and Continue Duplicate Save

TEMPLATE INFORMATION

Template Information ✎

Custom Option

Custom Option Template Information

Title *

Is Active * Yes ▾

Description

Applied Products (don't add conditions if rule is applied to all products) :

If ALL of these conditions are TRUE :

SKU is one of 24-WG085_Group,24-WG03

- **Save:** save all settings and then you will be redirected to the custom option template grid
- **Duplicate:** duplicate the custom option template. The duplicate template is removed the selected products of the original one.
- **Save and Continue:** save the template and continue staying in the edit page.
- **Delete:** delete the template
- **Back:** back to the template grid.

Note:



When the custom option template is deleted or set from Yes to No in Is Active field, the custom options assigned to the product using that template is removed.

After the custom option template is assigned to the product,

- If there are new options added to the template, then those new options are also added to the product.
- If the admin edits any option of the template, the relevant option of the product is also updated.
- If the admin deletes any option of the template, the relevant option of the product is also removed.

Custom Options assigned to the product using the template will be associated with that template.

However, Magento 2 Custom Option Template allows you to exclude a product from a custom options template in the product edit page.

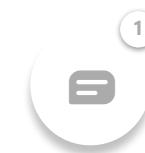


The screenshot shows the 'Customizable Options' configuration page for the product '4G Rugged Phones Ultekia Parkistan'. At the top, there are navigation buttons: 'Back', 'Add Attribute', and 'Save'. Below this, the section is titled 'Customizable Options' with a sub-header 'Custom options let customers choose the product variations they want.' To the right of this text is a circular refresh icon. Below the sub-header, there is a section for 'Excluded from Custom Option Template(s)' with a dropdown menu currently showing 'Phones' and an 'Add Option' button. To the right of this dropdown is a link for 'Import Options'. Below the exclusion section, there are navigation arrows and a page indicator '1 of 1'. The main configuration area is titled 'Words written' and contains several fields: 'Option Title' (set to 'Words written'), 'Option Type' (set to 'Field'), 'Required' (checked), a visibility icon (eye), 'Price' (set to '\$ 12.00'), 'Price Type' (set to 'Absolute'), 'SKU' (set to '1'), and 'Max Characters' (set to '23').

To exclude a product from one custom option template, click the template title in **Excluded from Custom Option Template(s)** multiple select box.

You can click on the eye sign and choose the visibility for option with customer group and store view.

Magento 2 Custom Option Template extension allows that one product can be assigned to multiple templates.



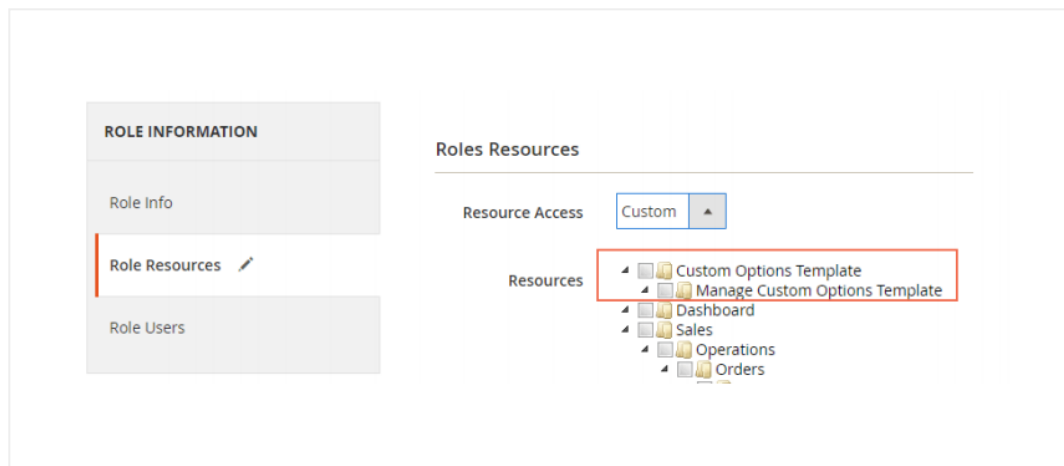
Currently, the module supports assigning the template to products by the product's conditions in the **Template Edit Page**. It means the template can not be assigned to products on the **Product Edit Page**.

When the custom option template is duplicated, assigned products will not be duplicated in the new template.

Note: When a product was excluded from a template, then rechoosing the template again, then it will be considered as a newly added custom option template.

3. Manage Admin User Roles

Please go to **System** ⇒ **Permissions** ⇒ **User Roles** to restrict other admin accounts accessing the custom options template management.



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Updated on March 12, 2021

[← Installation Guide](#)

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