

User Guide

Magento 2 Customer Approval

1. Overview

[Customer Approval for Magento 2 extension \(https://bsscommerce.com/magento-2-customer-approval-extension.html\)](https://bsscommerce.com/magento-2-customer-approval-extension.html) outweighs the default of Magento 2 by allowing admins to approve or disapprove new accounts as they want. This definitely helps store owners to manage new customer accounts.

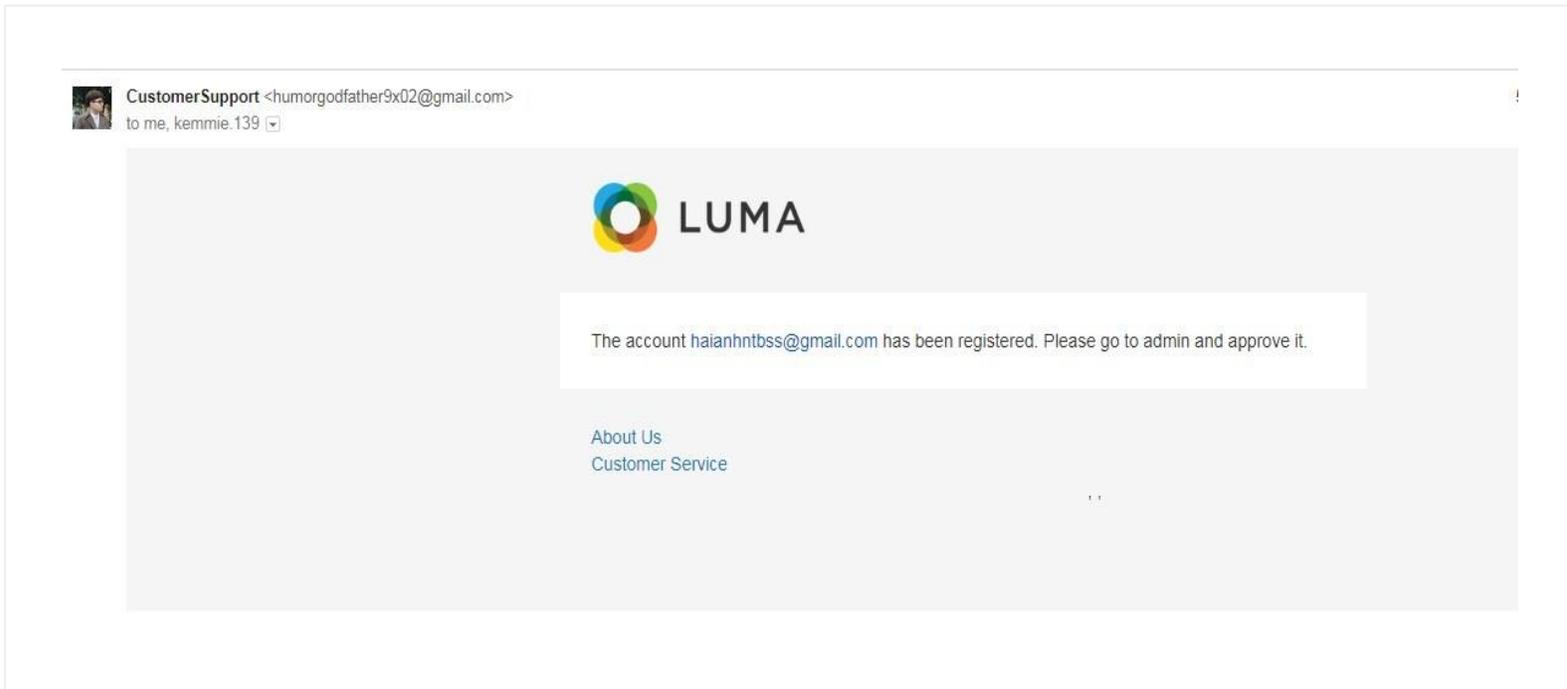
2. How Does It Work?

2.1 In the frontend

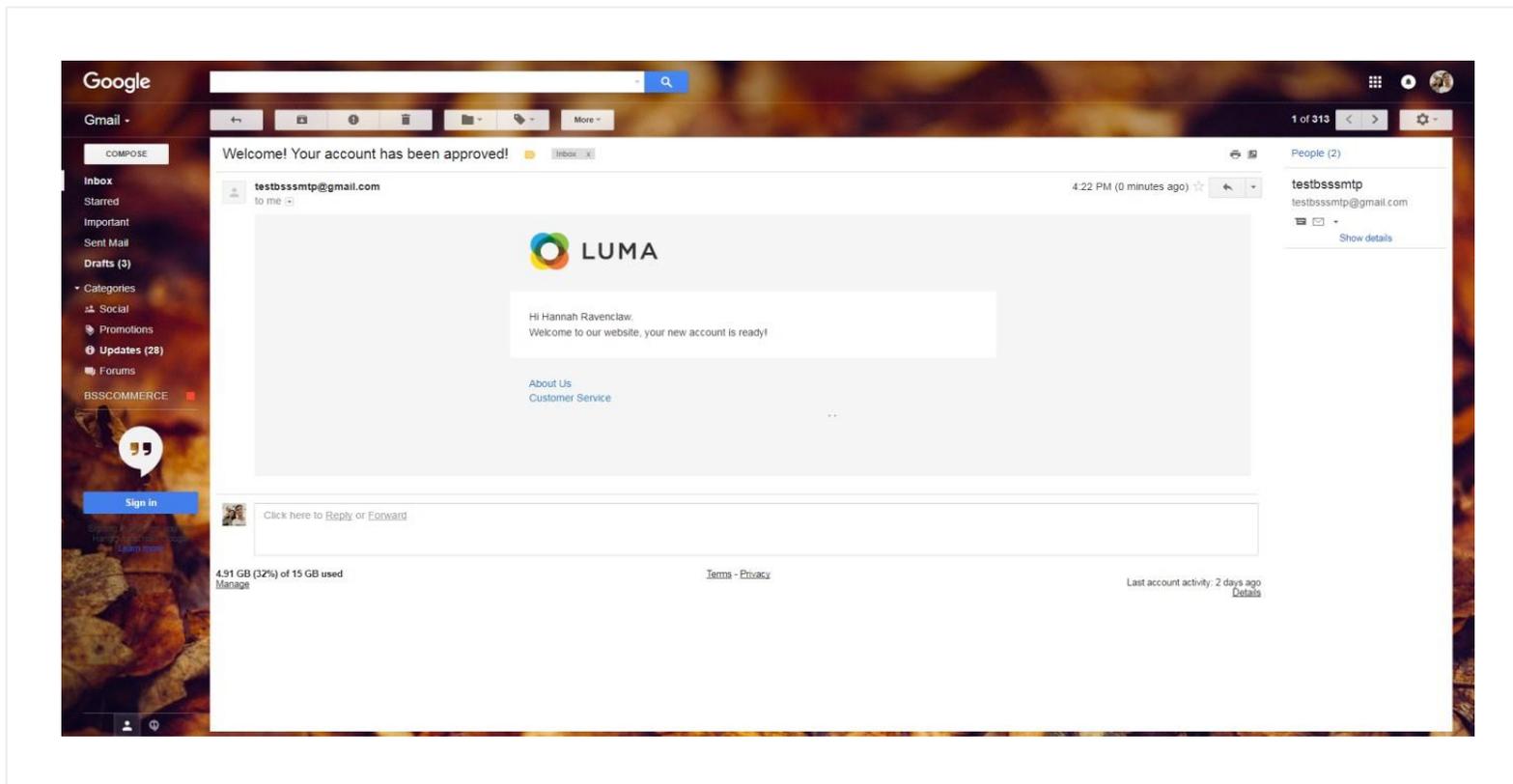
After a customer creates an account, there will be a Pending message shown up:

The screenshot displays the LUMA storefront's Customer Login page. At the top left is the LUMA logo. To the right is a search bar with the placeholder text "Search entire store here..." and a shopping cart icon. Below the search bar is a navigation menu with items: "What's New", "Women", "Men", "Gear", "Training", and "Sale". The main heading is "Customer Login". A red-bordered box highlights a green checkmark icon and the message: "Please give us time to verify your account. Thanks for visiting us." A red callout box with a white border points to this message, containing the text: "Pending message shown up after a customer created an account". Below the message are two columns: "Registered Customers" and "New Customers". The "Registered Customers" section includes the text "If you have an account, sign in with your email address." and form fields for "Email" and "Password", both marked with an asterisk. A "Sign In" button and a "Forgot Your Password?" link are located below these fields. The "New Customers" section includes the text "Creating an account has many benefits: check out faster, keep more than one address, track orders and more." and a blue "Create an Account" button. At the bottom left, there is a small red asterisk followed by the text "* Required Fields".

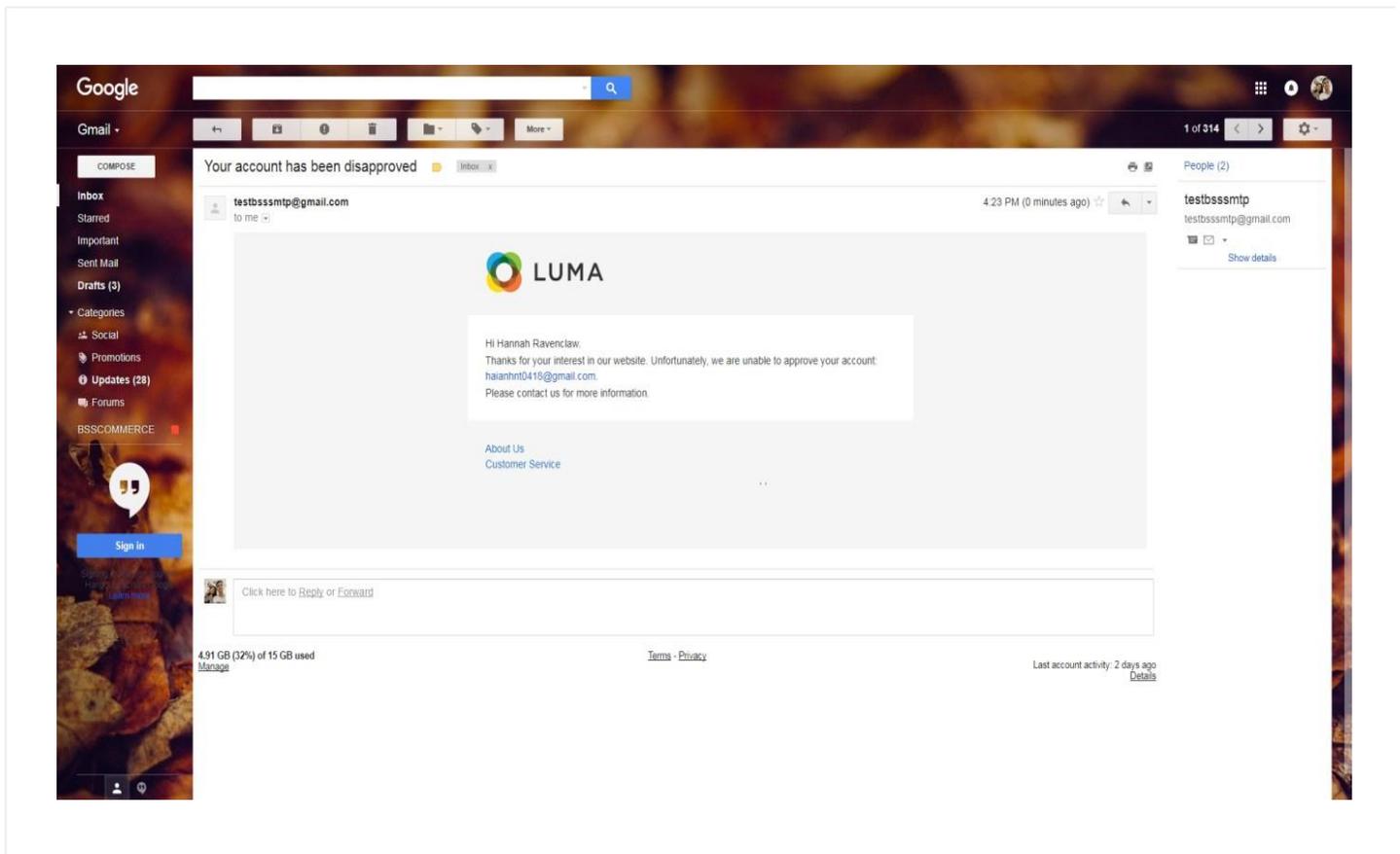
Next, a notification email will be sent to admin:



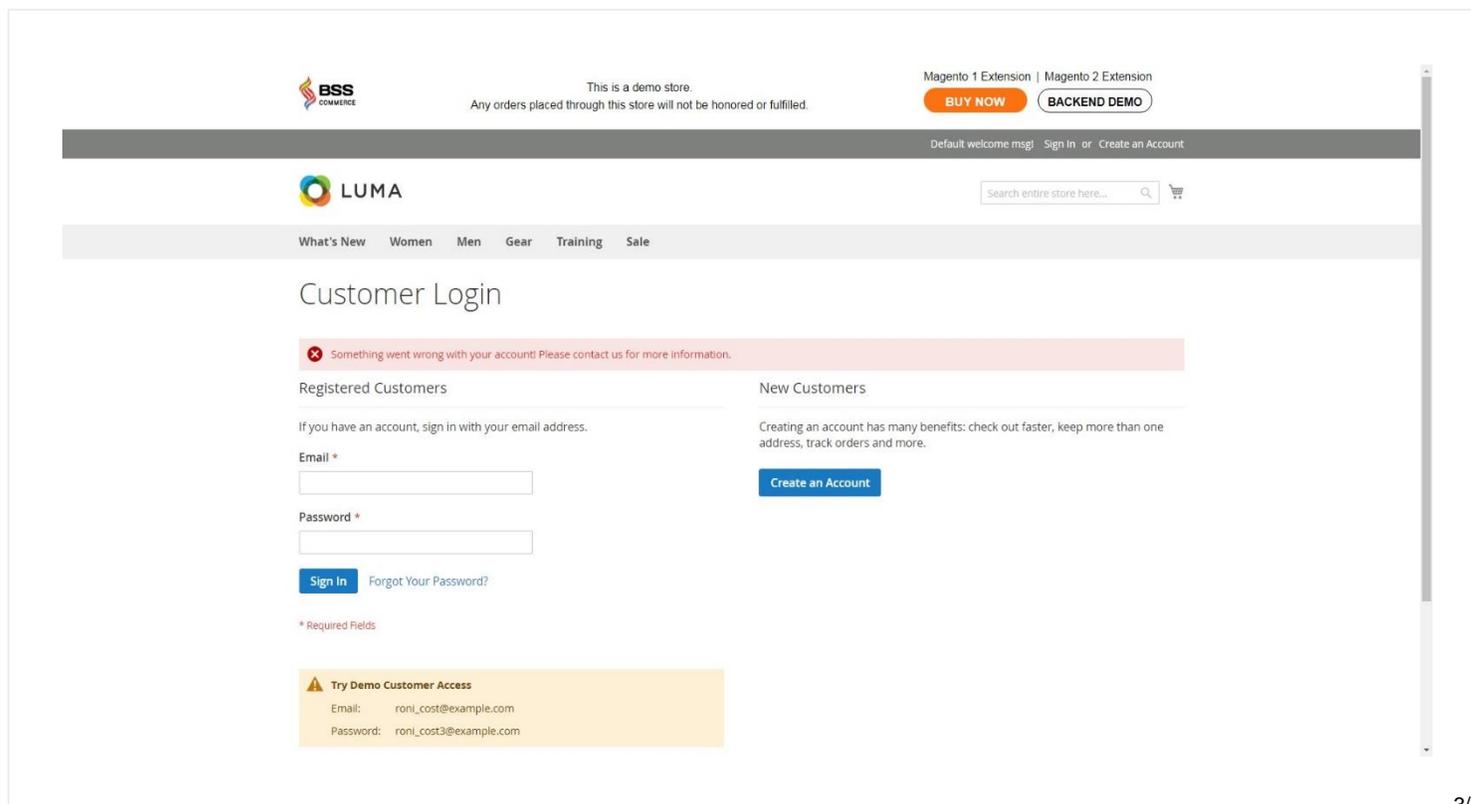
Then admin accepts or declines new accounts, there will be Approval or Disapproval emails sent to customers. Here is an Approval email:



Here is a Disapproval email



When this customer signs in, if his account is still pending, then the Pending message will be displayed. In case his account is disapproved, there will be a Disapproved message:



2.2 In the backend

2.2.1 General configuration

Go through **Stores** ⇒ **Setting** ⇒ **Configuration** ⇒ **BSS Commerce Customer Approva**

The screenshot displays the Magento 2 Configuration page for the BSS Commerce extension. The left sidebar contains navigation options: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled 'Configuration' and shows the 'Default Config' store view. The 'BSS COMMERCE' section is expanded to show 'Customer Approval' and 'Admin Email Settings'.

Customer Approval Configuration:

- Enabled [website]:** Yes (Version 1.0.0)
- Auto Approve Accounts [store view]:** No (Auto approve accounts when customer register.)
- Pending Message [store view]:** Please give us time to verify your account. Thanks for visiting us.
- Disapproval Message [store view]:** Something went wrong with your account! Please contact us for more informat

Admin Email Settings Configuration:

- Enabled [store view]:** Yes
- Email Templates [store view]:** Admin Email Template (Default) (Email template chosen based on theme fallback when "Default" option is selected.)
- Email Sender:** Customer Support

In General Configuration:

- **Enabled:** choose Yes to enable the module.
- **Auto Approve Accounts:**
 - Choose Yes if you want to accept new accounts automatically.

NOTE: The difference between this Auto Approve Accounts function and the default is that you still can change customer account status in the backend, whereas the default cannot.

- Choose No if you want to approve accounts manually.

In Admin Emails Settings:

- **Enabled:** choose Yes to enable configurations below.
- **Email Templates:** choose one of the available email templates of websites. This selected template will be used to send notifications about new accounts created for admin.
- **Email Sender:** choose a name and email sender from Store Email Address of the default.

The screenshot shows the Magento Configuration interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Third Parties & Extensions. The main content area is titled 'Configuration' and has a 'Save Config' button in the top right corner. Below the title is a navigation menu with 'SALES', 'SERVICES', and 'ADVANCED' options. The 'Admin Email Settings' section is active and contains the following fields:

- Enabled** (store view): A dropdown menu set to 'Yes'.
- Email Templates** (store view): A dropdown menu set to 'Admin Email Template (Default)'. Below it is a note: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Email Sender** (store view): A dropdown menu set to 'Customer Support'.
- Recipients** (store view): A text input field containing 'testmagento321@gmail.com'. Below it is a note: 'Email recipients, separated by commas.'

Below the Admin Email Settings is the 'Customer Email Setting' section, which contains the following fields:

- Enabled** (store view): A dropdown menu set to 'Yes'.
- Email Sender** (store view): A dropdown menu set to 'Custom Email 2'.
- Approval Email Templates** (store view): A dropdown menu set to 'Approve Email Template (Default)'. Below it is a note: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Disapproval Email Templates** (store view): A dropdown menu set to 'Disapprove Email Template (Default)'. Below it is a note: 'Email template chosen based on theme fallback when "Default" option is selected.'

At the bottom of the page, there is a copyright notice: 'Copyright © 2017 Magento, Inc. All rights reserved.' and the version number: 'Magento ver. 2.1.7'.

In Customer Email Settings:

- **Enabled:** choose Yes so that all configurations below can work.
- **Email Sender:** choose name and email of the sender from Store Email Address of the default.
- **Approval Email Templates:** select one of the available email templates of your site. This template will be used if admin change account status into Approved.
- **Disapproval Email Templates:** select one of the available email templates of your site. This template will be used if admin change account status into Disapproved.

NOTE in Email sender (for both Admin and Customer Email Settings):

- If you use SMTP in order to send mails then it just allows you to register the sender's name. This Email Sender function gets email only in email configuration of the SMTP module. Please go to **Stores ⇒ Configuration ⇒ Advanced ⇒ System ⇒ Gmail/Google Apps SMTP Pro** in order to change email sender as you want.
- If your server is not registered via SMTP to send emails then this configuration will get both name and email of the sender.

2.2.2 Customer Attributes in the backend

In Customer Grid:

- After installing Customer Approval for Magento 2 extension, there is a Status column in Customer Grid in the backend.

Customers 🔔 1 👤 customer-approval

[Add New Customer](#)

Search by keyword

Filters | Default View | Columns | Export

Actions 4 records found 20 per page | 1 of 1

	ID ↓	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Status	Action
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Aug 3, 2017 4:37:56 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female		Edit
<input type="checkbox"/>	2	Hannah Ravenclaw	haianhnt0418@gmail.com	General					Aug 29, 2017 9:47:18 AM	Main Website	Confirmation Not Required	Default Store View				Approved	Edit
<input type="checkbox"/>	4	Hagan Potter	haganbss123asd@gmail.com	General					Aug 29, 2017 10:12:54 AM	Main Website	Confirmation Not Required	Default Store View				Disapproved	Edit
<input type="checkbox"/>	5	Hannah Cyrus	lethibac94@gmail.com	General					Aug 29, 2017 10:14:17 AM	Main Website	Confirmation Not Required	Default Store View				Approved	Edit

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[Account Activity](#) | [Report Bugs](#)

Customers

customer-approval

Add New Customer

Search by keyword

Filters Default View Columns Export

Actions 4 records found 20 per page 1 of 1

ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Status	Action
1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Aug 3, 2017 4:37:56 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female		Edit
2	Hannah Ravenclaw	haianhnt0418@gmail.com	General					Aug 29, 2017 9:47:18 AM	Main Website	Confirmation Not Required	Default Store View				Approved	Edit
4	Hagan Potter	haganbss123asd@gmail.com	General					Aug 29, 2017 10:12:54 AM	Main Website	Confirmation Not Required	Default Store View				Disapproved	Edit
5	Hannah Cyrus	lethbac94@gmail.com	General					Aug 29, 2017 10:14:17 AM	Main Website	Confirmation Not Required	Default Store View				Approved	Edit

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Magento ver. 2.1.7 Account Activity | Report Bugs

- In addition, admin can edit this status conveniently right in Customer Grid:

The screenshot shows the Magento admin interface for the 'Customers' section. A modal window is open for editing the customer 'Hannah Ravenclaw'. The 'Status' dropdown menu is open, showing options: Disapproved, Pending, Approved, and Disapproved. The 'Save' button is highlighted in orange.

ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Status	Action
1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Aug 3, 2017 4:37:56 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female		Edit
4	Hannah Ravenclaw	haianhnt0418@gmail.com	General					Aug 28, 2017 4:10:38 PM	Main Website	Confirmation Not Required	Default Store View				Disapproved	Edit

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Magento ver. 2.1.7 Account Activity | Report Bugs

- Moreover, admin can have mass action: choose multiple customer accounts to approve or disapprove them at once

Customers 🔔 1 👤 customer-approval

[Add New Customer](#)

Search by keyword 🔍

Filters | Default View | Columns | Export

4 records found (3 selected) 20 per page | 1 of 1

Actions	Mail	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Status	Action
<input type="checkbox"/>	..._cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Aug 3, 2017 4:37:56 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female		Edit
<input type="checkbox"/>	...ant0418@gmail.com	General					Aug 29, 2017 9:47:18 AM	Main Website	Confirmation Not Required	Default Store View				Approved	Edit
<input type="checkbox"/>	...anbss123asd@gmail.com	General					Aug 29, 2017 10:12:54 AM	Main Website	Confirmation Not Required	Default Store View				Disapproved	Edit
<input checked="" type="checkbox"/>	Hannah Cyrus lethibac94@gmail.com	General					Aug 29, 2017 10:14:17 AM	Main Website	Confirmation Not Required	Default Store View				Approved	Edit

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In Customer Information:

- ◆ Status information is included in Customer View:

This is a demo store. Any orders placed through this store will not be honored or fulfilled.

Magento 1 Extension | Magento 2 Extension
BUY NOW | **FRONTEND DEMO**

Veronica Costello customer-approval

← Back Delete Customer Reset Reset Password Force Sign-In Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Billing Agreements
- Wish List

Personal Information

Last Logged In:	Never (Offline)
Confirmed email:	Confirmation Not Required
Account Created:	Aug 3, 2017, 4:37:56 PM
Account Created in:	Default Store View
Customer Group:	General
Status:	Approved

Default Billing Address

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan, 49628-7978
United States
T: (555) 229-3326

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- ◆ Admin can change an account status as wish in Account Information:

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← Back Delete Customer Reset Reset Password Force Sign-In Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Billing Agreements
- Wish List

Account Information

Status * Approved ?

Associate to Website * Approved ?

Group * General

Disable Automatic Group Change Based on VAT ID

Prefix

First Name *

Middle Name/Initial

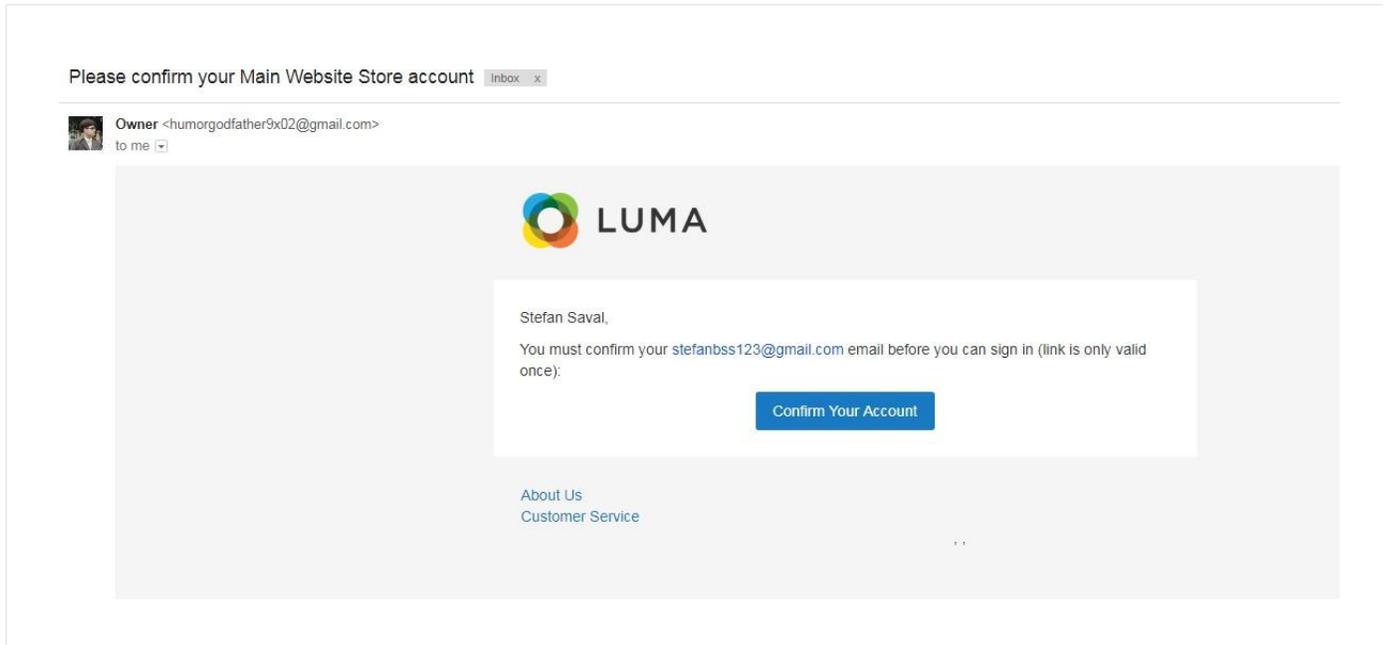
Last Name *

Suffix

Email *

2.2.3. Required Email Confirmation

After installing this extension, in case admin sets Yes in Require Emails Confirmation, then when a customer creates an account, he cannot use his account and will be redirected to login page. A confirmation email will be sent to this customer so as to confirm his email and admin will also receive a notification about new accounts at the same time.



Next, this customer confirms his email then he will redirect to the login page. Pending message will be shown and still cannot use his account until the admin changes its status into Approved.

2.3 Notes for Installation

- Copy all folders of the module into the root folder
- Name the folder: Bss/CustomerApproval
- Run: `php bin/magento setup:upgrade` in order to setup the module Run: `php bin/magento cache:flush` to clear cache
- Run: `php bin/magento setup:static-content:deploy`
- Run: `php bin/magento indexer:reindex customer_grid` to reindex the customer grid
- If the customer grid does not show users then you need to reindex the customer grid by `php bin/magento indexer:reindex customer_grid`