

Customer Attributes User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via our email address below.

Edited: 22/08/2019 | By Magenest | Support Portal: <https://servicedesk.izysync.com/servicedesk/customer/portal/42>

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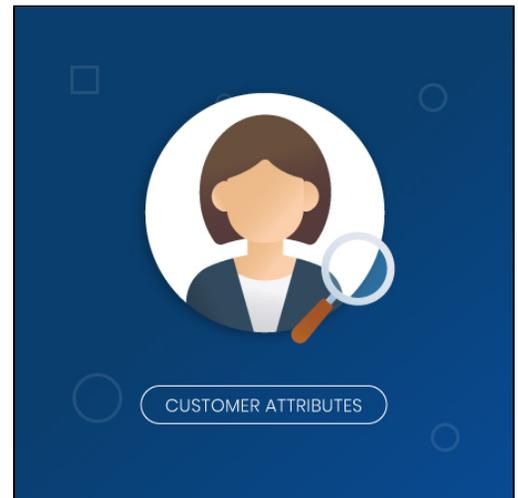
Introduction

Customer Attributes extension allows the merchant to collect and manage more information from the customer, which is essential for their business strategy.

Features

- Create unlimited customer attributes.
- Multiple attribute input types: text, text area, date, dropdown, multi-select, yes/no, single file upload, multiple select with images, single radio with image.
- Collect more information from the customer by the additional attributes.
- Allow admin to manage attributes: view, edit and delete attributes.
- Login as a customer from the backend.
- Add new attributes to the registration form page and account information page.
- Set the default value for the attribute.
- Set the order of the attributes to display on the frontend.
- Input validation for attributes.
- Allow customers to edit the additional information.

System Requirements



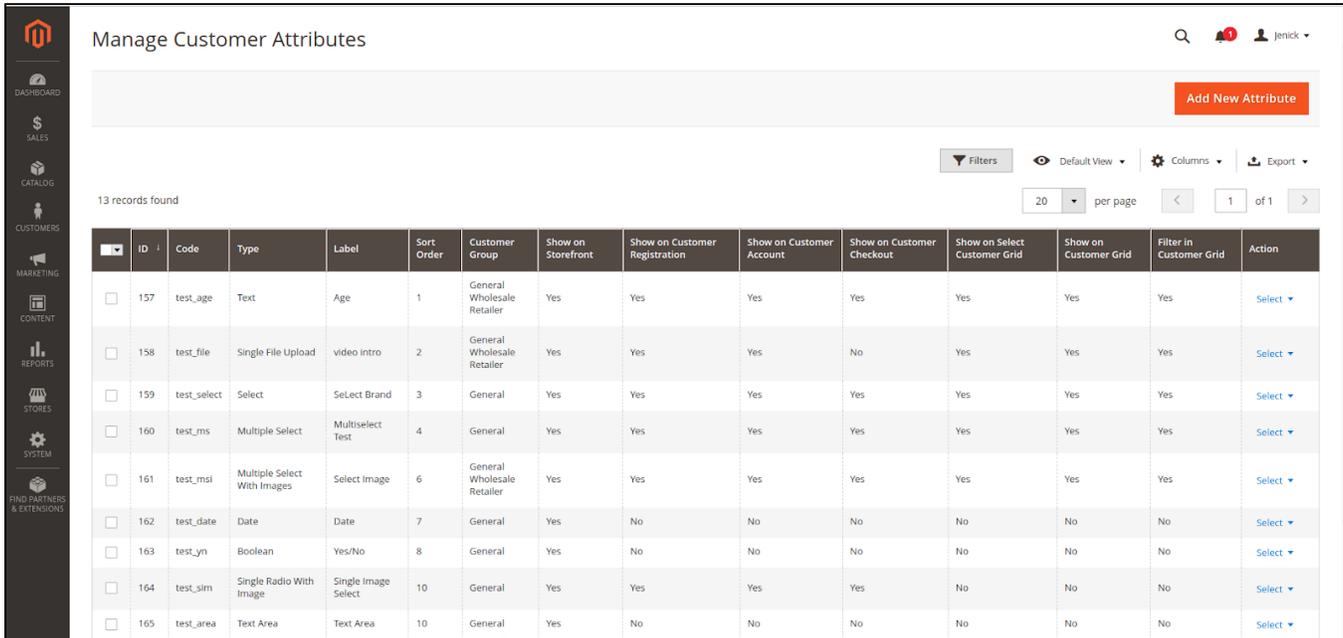
Your store should be running on Magento Community Edition version 2.2.x, 2.3.x, and 2.4.x.

Configuration

1. Add a new attribute

On the Admin Sidebar, tap **Customer**, then choose **Manage Attributes**.

On the **Manage Customer Attributes** page, Admin can view and manage the available attributes or create a new attribute by clicking on **Add New Attribute** button.



Manage Customer Attributes

13 records found

20 per page

<input type="checkbox"/>	ID	Code	Type	Label	Sort Order	Customer Group	Show on Storefront	Show on Customer Registration	Show on Customer Account	Show on Customer Checkout	Show on Select Customer Grid	Show on Customer Grid	Filter in Customer Grid	Action
<input type="checkbox"/>	157	test_age	Text	Age	1	General Wholesale Retailer	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Select
<input type="checkbox"/>	158	test_file	Single File Upload	video intro	2	General Wholesale Retailer	Yes	Yes	Yes	No	Yes	Yes	Yes	Select
<input type="checkbox"/>	159	test_select	Select	SeLect Brand	3	General	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Select
<input type="checkbox"/>	160	test_rms	Multiple Select	MultiSelect Test	4	General	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Select
<input type="checkbox"/>	161	test_rmsi	Multiple Select With Images	Select Image	6	General Wholesale Retailer	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Select
<input type="checkbox"/>	162	test_date	Date	Date	7	General	Yes	No	No	No	No	No	No	Select
<input type="checkbox"/>	163	test_yn	Boolean	Yes/No	8	General	Yes	No	No	No	No	No	No	Select
<input type="checkbox"/>	164	test_sim	Single Radio With Image	Single Image Select	10	General	Yes	Yes	Yes	Yes	No	No	No	Select
<input type="checkbox"/>	165	test_area	Text Area	Text Area	10	General	Yes	No	No	No	No	No	No	Select

On the **New Customer Attribute** page:

Properties

Input Type: there are 9 options for the input type of customer attribute.

New Customer Attribute

← Back Save and Continue Edit Save

Properties

Default Label *

Attribute Code *

For internal use. Must be unique with no spaces

Input Type * Text Field

Default Value

Is Required No

Customer Group *

- NOT LOGGED IN
- General
- Wholesale
- Retailer

Input Validation All Validates

+ **Default Label:** enter the name of the attribute which will display as the attribute title on the frontend.

+ **Attribute Code:** enter the identified code for the attribute.

+ **Input Type:** there are 9 options for the input type of customer attribute.

1 Text Field

- This is a single line input field for text.

Input Type * Text Field

Default Value

Is Required No

Customer Group *

- NOT LOGGED IN
- General
- Wholesale
- Retailer

Input Validation All Validates

- **Default Value:** enter the default text which appears in the field as a suggestion. Customer can edit the text.
- **Input Validation:** select among 6 options: Alphanumeric, Numeric Only, Alpha Only, URL, Email, Date and All Validates.

Text Field type display:

Note *

2

Text Area

This is a multiple-line input field for entering paragraphs of text.

Input Type * Text Area

Default Value

- **Default Value:** enter the default text which appears in the field as a suggestion. Customer can edit the text.
- **Text Area** type display:

Please leave your comment in here *

3

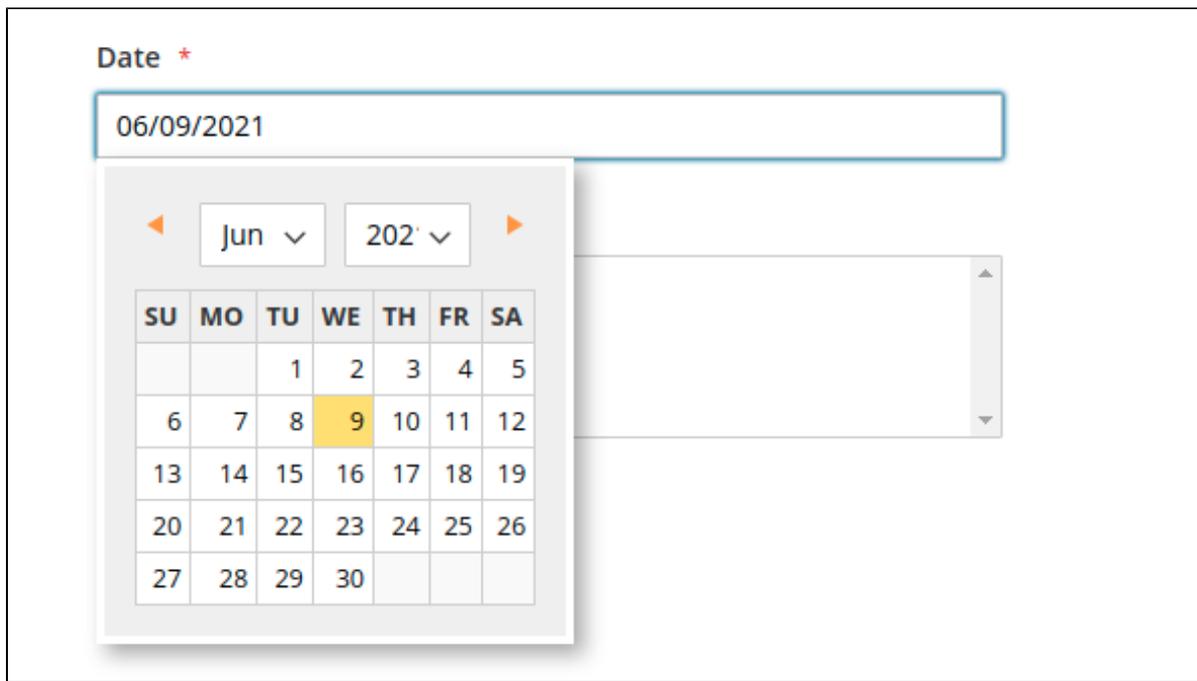
Date

The date can be entered by making a selection from the popup calendar.

Input Type * Date

Default Value

- **Default Value:** choose the default value which appears in the field as a suggestion. Customer can choose another date.
- **Date** type display:



4 **Multiple Select**

This type allows displaying a drop-down list of values. To select more than one option, the customer can hold the Ctrl key down and click each item.

Input Type * Multiple Select

Add Options

Is Default	Show options in admin *	Show options in storefront *	Actions
<input type="checkbox"/>	reading	Reading	
<input checked="" type="checkbox"/>	walking	Walking	
<input checked="" type="checkbox"/>	studying	Studying	
<input type="checkbox"/>	learning	Learning	

Add Option

- Click on **Add Option** button to add more option to the drop-down list for the attribute.
- Tick on the tickbox under **Is Default** column to set the option as default.
- **Show option in admin:** enter the title of the option which displays on the backend.
- **Show option in storefront:** enter the title of the option which displays on the customer side.
- **Multiple Select** type display:



[Additional Information Form](#) ^

Additional Information

Which group of our product you are interested in? *

- For Children
- For Teenager
- For Adult

How do you feel about our service? *

Choose a location you would like for our next store

Will you refer our service to the other?

Payment Method

Check / Money order

My billing and shipping address are the same

Order Summary

Cart Subtotal	\$200.00
Shipping Flat Rate - Fixed	\$10.00

Order Total **\$210.00**

1 Item in Cart

Ship To:

1, 1, 1
1, American Samoa 12345-6789
United States
2345657668

Shipping Method:

Flat Rate - Fixed

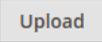
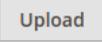
5

Multiple Select With Images

There will be a list of options with images for customer's selection.

Input Type * Multiple Select With Images ▾

Add Options

Is Default	Image *	Image Title *	Actions
<input type="checkbox"/>	  smile.jpg 640x426, 79 KB	<input type="text" value="Smile"/>	
<input type="checkbox"/>	  images.jpeg 275x183, 8 KB	<input type="text" value="Travel"/>	
<input type="button" value="Add Option"/>			

Is Required Frontend and Backend ▾

- Click on **Add Option** button to add more option.
- Choose the image and fill the title for each option.
- **Multiple Select With Images** type display:

Select Image *

 Smile	 Travel
--	---

6

Dropdown

This type displays a drop-down list of values for customer selection.

Add Options

Is Default	Value *	Actions
<input type="checkbox"/>	<input type="text" value="1"/>	
<input type="checkbox"/>	<input type="text" value="2"/>	
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	

Other Option Label Input

- Click on **Add Option** button to add more option.
- **Value:** Enter the title for each option in the dropdown list.
- **Other Option Label Input:** enter the text for the last option in the drop-down list, which is the option for the customer who has the question beyond the listed answers in the default list.
- **Dropdown** type display:

How do you feel about our service? *

▼

Bad

----- Select -----

Great

Good

Not bad

Bad

Bad *

Enter Bad: How do you feel about our service?

7

Yes/No

This type allows displaying a drop-down list with pre-defined options of "Yes" and "No".

Input Type * Yes/No

Default Value No

Is Required No

- **Default Value:** choose the value that will be marked by default. Customers can choose another option.
- **Yes/No** type display:

Yes/No *

Yes

Yes

No

8 **Single radio Image**

There will be a list of options with images that allows the customer to select only one option.

Input Type * Single Radio Image

Add Options

Is Default	Image *	Image Title *	Actions
Add Option			

- Click on **Add Option** button to add more option.
- Choose the image and fill the title for each option, which will display with the image.
- **Single radio Image** type display:

Please choose one card for you! *



Bonus \$30 for the bill



9

Single File Upload:

Input Type *

Is Required

Max File Size

In Mb, server upload max filesize: 8 MB

File Types

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

- **Max file size:** the maximum size for the uploaded file (MB)
- **File types:** file types allowed to upload, list comma-separated file types with no spaces, like png,txt,jpg.

- + **Is Required:** decide whether the attribute is required to be filled by the customer among 3 options: Frontend and Backend, No, Only Frontend.
- + **Customer Group:** select the customer group to display the attribute.

Admin Configuration and Store Configuration

Admin can set for the display of the attribute in the backend and frontend by choosing Yes or No in each field.

The screenshot shows a configuration interface with two main sections: Admin Configuration and Store Configuration. In the Admin Configuration section, there are three dropdown menus: 'Use in Customer Grid' (set to No), 'Filter in Customer Grid' (set to No), and 'Display on the Select Customer Grid' (set to No). Below the third dropdown is a small note: 'This applies to the customer grid which is use select a customer during order creation at the backend'. The Store Configuration section has four fields: 'Show on Storefront' (set to Yes), 'Sort Order' (a text input field), 'Show on Customer Registration' (set to No), and 'Show on Customer Account Edit' (set to No).

- + **Use In Customer Grid:** choose **Yes** to show the attribute in the customer grid.
- + **Filter In Customer Grid:** choose **Yes** to use the attribute to filter in searching customers.
- + **Display on the select customer grid:** choose **Yes** to show the attribute in the select customer grid, which is available when you create the order from the back-end.
- + **Show On Storefront:** choose **Yes** to enable the attribute on the store.
- + **Sort Order:** set the position of the new attribute among other attributes.
- + Choose **Yes/No** to allow the attribute to display on the Customer Registration, Customer Account, and Customer Checkout page at the store.
- ⚠ **Note:** The attribute with the **Single File Upload** input field will **NOT** display on the checkout page.
- + After finishing the setup, click **Save** to save the attribute and view it on the frontend.

2. Add a new attribute relation

With the attribute relation, the additional information displayed in related attributes form helps strengthen the interaction between different attributes, then create a logical structure for merchants to better gather customers' insight.

- + On the Admin sidebar, go to **Customer > Manage Attributes Relation**.
- + On **Manage Customer Attributes Relation** page, admin can view and manage the relation of the available attributes or create a new relation by clicking on Add New Attribute Relation button.

Manage Customer Attributes

1 records found

ID	Name	Parent Attribute	Parent Option	Dependent Attribute	Action
2	Branding	Do you take brand name into consideration when shopping?	Yes	Which of the following brand logos do you recognize? - Which aspects concern you when shopping -	Edit

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+ On **New Customer Attribute Relation** page

- **Relation Name:** Enter the title of the attribute relation which will display on the backend.
- **Parent:** Select an attribute on the drop-down list to create a new relation.
 - ⚠ **Note:** Admin can select the parent attribute with the following types only: Dropdown, Yes/No and Single Radio Image.
- **Parent Option:** Select an option of the parent attribute to lead to different dependent attributes.
 - ⚠ **Note:** Admin can set a new relation for only one parent option at once.
- **Dependent Attributes:** Select one or more dependent attributes that the parent option will lead to.

Edit Attribute Relation

← Back Delete Reset Save and Continue Edit **Save Relation**

General Information

Relation Name * Branding

Parent * Do you take brand name into consideration when shopping?

Parent Option * Yes
No

Dependent Attributes * Which of the following brand logos do you recognize?
Which aspects concern you when shopping

- **+** After finishing the configuration, click on **Save Relation** button to save.

+ The layout of attribute relation on the front-end

The screenshot shows a form titled "Additional Information" with three main sections. The first section is a dropdown menu with the question "Do you take brand name into consideration when shopping? *". The "Yes" option is selected and highlighted in blue. A green callout bubble labeled "Parent option" points to this dropdown. The second section is a grid of four brand logos: NIKE, adidas, VANS, and CONVERSE. A green callout bubble labeled "Dependent attribute" points to this grid. The third section is a list box with the question "Which aspects concern you when shopping *". The list contains "Brand", "Price", "Trend", and "Taille". A green callout bubble labeled "Dependent attribute" points to this list box. Arrows from the "Parent option" callout point to the two dependent attribute sections.

The dependent attributes will display when the parent option is selected

Functions

On Storefront

The configured attributes will display as additional information at the storefront.

+ Additional information on the Customer Registration page

There will be additional fields besides the default attributes of Magento on the registration form, which help the merchant collect more necessary information from the customer.

Create New Customer Account

Personal Information

First Name *

Last Name *

Sign Up for Newsletter

Allow remote shopping assistance ?

Sign-in Information

Email *

Password *

Password Strength: No Password

Confirm Password *

* Required Fields

Additional Information

Age *

Video Intro *

No file chosen

Select Brand

Single Image Select *



CC



B



Travel

Multiselect Test *

Brand Fav *



Travel



Sky



Bugs

Create an Account

+ Additional information on **Edit Account Information** page

All the attributes set in the extension will display in the Additional Information section, which customers can edit on My Account page.

- My Account
- My Orders
- My Downloadable Products
- My Wish List

- Address Book
- Account Information**
- Stored Payment Methods

- My Product Reviews
- Newsletter Subscriptions

Edit Account Information

Account Information

First Name *

Veronica

Last Name *

Costello

Change Email

Change Password

Change Additional Information

Additional Information

Age *

21

Video Intro *

[example.mp4](#)

No file chosen

Select Brand

Tesla

Multiselect Test *

AA
BB
DD

Select Image *



Smile



Travel

Rteee

Tet 1
Tet 2

Brand Fav *



Travel



Sky



Compare Products

You have no items to compare.

My Wish List

You have no items in your wish list.



+ Additional information on the Customer Checkout page

A screenshot of the LUMA Customer Checkout page. The page is in the "Review & Payments" step, indicated by a progress bar at the top. The "Additional Information" form contains several fields: a dropdown menu for "Which group of our product you are interested in?" with options "For Children", "For Teenager", and "For Adult"; a dropdown for "How do you feel about our service?" with "Great" selected; a dropdown for "Choose a location you would like for our next store" with "American Samoa" selected; and a dropdown for "Will you refer our service to the other?" with "Yes" selected. A "Save" button is below the form. The "Payment Method" section shows "Check / Money order" and a checked checkbox for "My billing and shipping address are the same". On the right, the "Order Summary" sidebar shows: Cart Subtotal \$200.00, Shipping Flat Rate - Fixed \$10.00, and Order Total \$210.00. Below the summary, the shipping address is displayed: "Ship To: 1, 1, 1, 1, American Samoa 12345-6789, United States, 2345657668". The shipping method is "Flat Rate - Fixed".

⚠ Note:

- The attribute with the **Single File Upload** input field will **NOT** display on the checkout page.
- Only logged-in customers can view additional information (attributes) on the checkout page.

On Back-end

+ Additional information displays on the customer grid.

Create New Order for New Customer

🔍 🔔 1 👤 Jenick

[← Back](#)

Please select a customer [Create New Customer](#)

Search Reset Filter 4 records found
20 per page < 1 of 1 >

ID	Name	Email	Phone	ZIP/Post Code	Country	State/Province	Signed-up Point	Website	Age	video intro	Select Brand	Multiselect Test	Select Image
					All Countries								
4	Ngoc Ngoc	ngoc123222@gmail.com					Default Store View	Main Website	19	big_buck_bunny_720p_1mb.mp4	Tesla	A,CC	
3	lee Le bb	test@gmail.com					Default Store View	Main Website	21	big_buck_bunny_720p_1mb.mp4	Tesla	A	
2	Lee Jenick	jenick@gmail.com					Default Store View	Main Website	22	big_buck_bunny_720p_1mb.mp4		BB	
1	Veronica Costello	roni_cost@example.com	(555) 229-3326	49628-7978	United States	Michigan	Vietnamese	Main Website	21	example.mp4	Tesla	BB	

+ Additional information is used to filter in the customer grid.

Customers

🔍 🔔 1 👤 Jenick

[Add New Customer](#)

Search by keyword 🔍

Filters 👁 Default View ⚙ Columns 📄 Export

ID from to
Customer Since from to
Name
Email
Group
Phone
ZIP
Country
State/Province
Web Site
Age
video intro

[Cancel](#) [Apply Filters](#)

Actions 4 records found
20 per page < 1 of 1 >

<input type="checkbox"/>	ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Select Image	video intro	Age	Action
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Jun 23, 2021 4:16:39 AM	Main Website	Confirmation Not Required	Default Store View		example.mp4	21	Edit

+ Additional information displays on the Customer Information page.

Admin can view and edit customer information from the backend, including the additional information.

Veronica Costello 🔍 1 👤 jenick

← Back Login as Customer Delete Customer Reset Create Order Reset Password Force Sign-In Login Account Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Shopping cart
- Newsletter
- Billing Agreements
- Product Reviews
- Wish List
- Additional Information

Additional Information

Age *

video intro [example.mp4](#)
 Delete File
 No file chosen

Select Brand

Multiselect Test *

Select Image *  
Smile Travel

Date *

Yes/No *

+ Login Account

On the customer information page from the backend, admin can log in to the customer account from the backend by clicking on the **Login Account** button.

Jessie Schlosser 🔍 26 👤 imagenest

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

CUSTOMER INFORMATION

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

Personal Information

Last Logged In:	Oct 26, 2019, 7:51:04 AM (Offline)	Default Billing Address
Account Lock:	Unlocked	The customer does not have default billing address.
Confirmed email:	Confirmation Not Required	
Account Created:	Oct 8, 2019, 7:51:44 AM	
Account Created in:	Default Store View	
Customer Group:	General	

+ Export the customer data

Admin can export the customer data to CSV, XML, and Excel according to their needs.

Manage Customer Attributes

3 records found

ID	Code	Type	Label	Sort Order	Customer Group
140	brand_name	Boolean	Do you take brand name into consideration when shopping?	1	General
141	brand_rep	Multiple Select With Images	Which of the following brand logos do you recognize?	2	General
143	brand_as	Multiple Select	Which aspects concern you when shopping?	2	General

Export options: Export Grid Data To CSV, Excel XML, Export Customer Data To Excel File

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+ Attribute Report

Admin can view each attribute report and improve customer flow analysis. The report is shown at the bottom of the attribute detail page.

Report Attribute

Attribute Id	Attribute Code	Type	Value	Customer Group	Use in Registration	Use in Account	Use in Checkout
141	brand_rep	Multiple Select With Images	NIKE adidas VANS CONVERSE	General	no	no	yes

Statistics of customer choices

Brand	Percentage
NIKE	33.3%
adidas	33.3%
VANS	33.3%

Update

- When a new update is available, we will provide you with a new package containing our updated extension.
- You will have to delete the module directory and repeat the installation steps above.
- Flush the config cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests within **2 business days**.
- We will offer **lifetime free update and 6-month free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other services such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.