

amasty

For more details, see the way the [Customer Attributes for Magento 2](#) extension works.

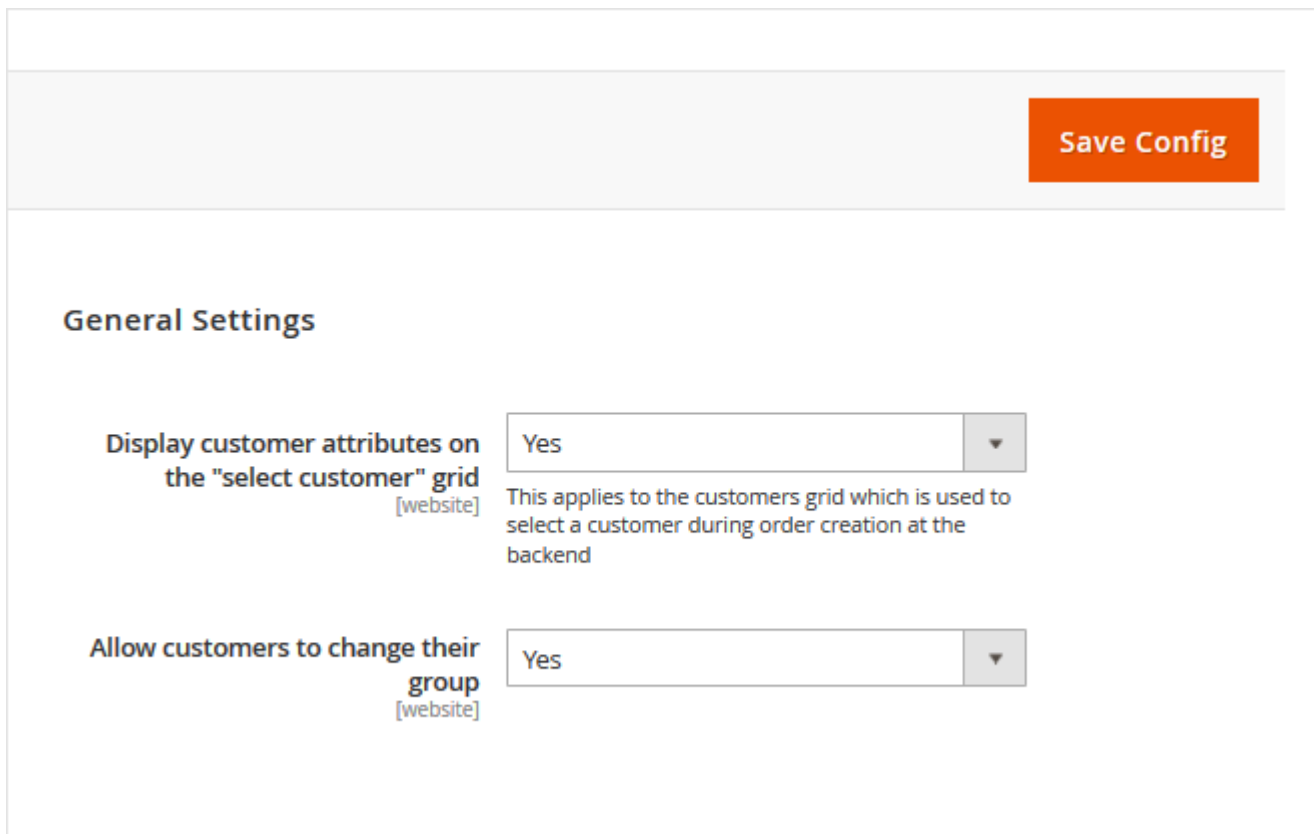
Guide for Customer Attributes for Magento 2

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 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	Instagra	 <input type="button" value="Browse..."/> No file selected.	<input type="checkbox"/>	<input type="button" value="Delete"/>
<input type="checkbox"/>	Pinterest	Pinteres	 <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

← Back Delete Relation Reset Save and Continue Edit Save

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? *

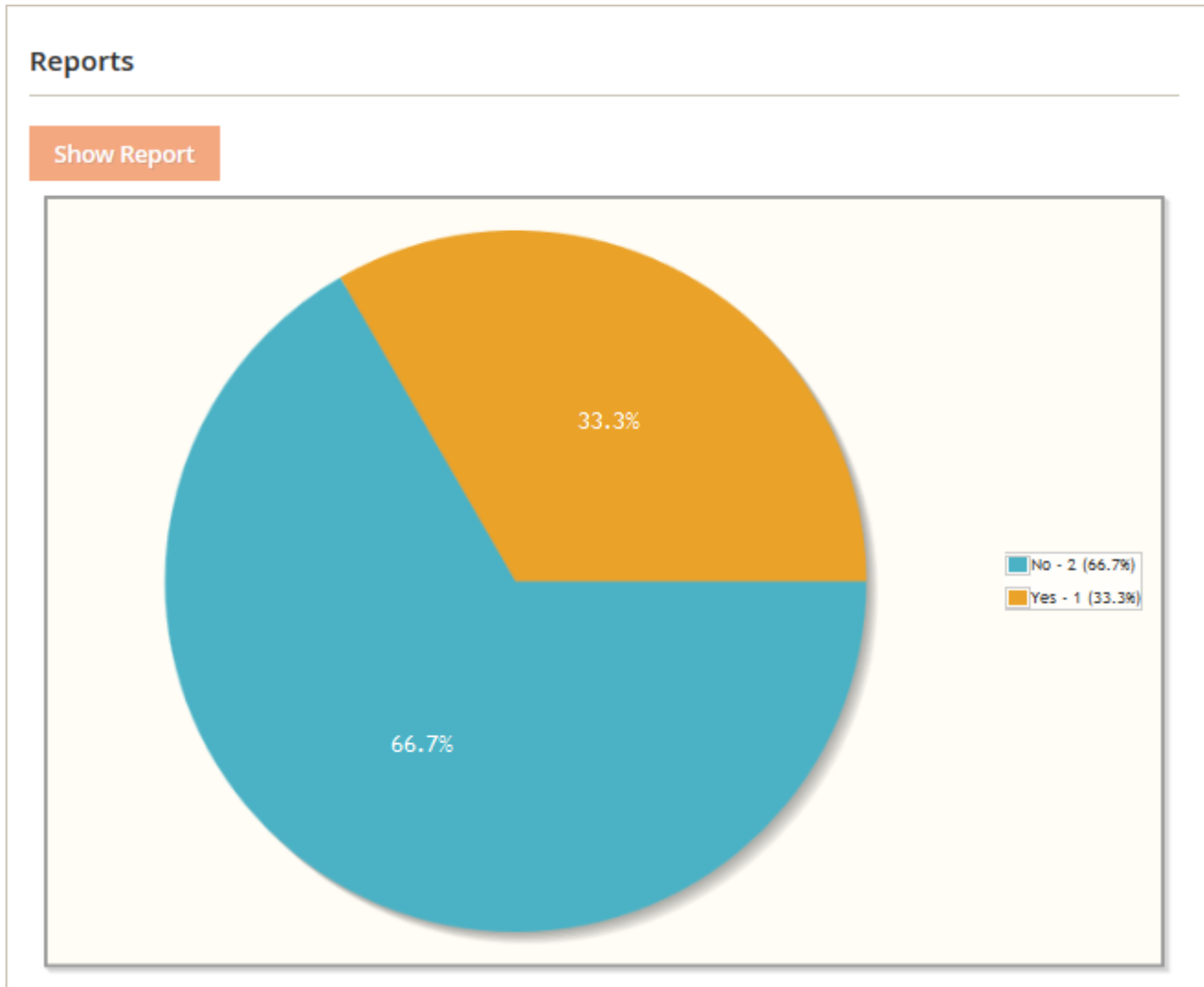
Your position in the company *

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

[Search](#) [Reset Filter](#) 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.

The screenshot shows the 'Import' configuration page in Magento 2. At the top right, there are search, notification, and user icons. A yellow banner at the top contains a warning: 'Make sure your file isn't more than 2M.' Below this is a 'Check Data' button. The 'Import Settings' section includes 'Entity Type' set to 'Customers Main File' with a 'Download Sample File' link. The 'Import Behavior' section has 'Import Behavior' set to '-- Please Select --', 'Stop on Error' set to 'Stop on Error', 'Allowed Errors Count' set to '10' (with a note: 'Please specify number of errors to halt import process'), 'Field separator' set to '.', 'Multiple value separator' set to '.', and 'Fields enclosure' checked. The 'File to Import' section has 'Select File to Import' set to 'Choose File' (with 'No file chosen') and an empty 'Images File Directory' field (with a note: 'For Type "Local Server" use relative path to Magento installation, e.g. var/import, var/import, var/import/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](#).

Customer Attributes Pro

All features below are available **only in the Pro version** of the extension.

General Settings

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

Scope: Default Config ? Save Config

- GENERAL
- CUSTOMERS
- SALES
- AMASTY EXTENSIONS**

Customer Attributes

Customer Attributes 2.3.0 by **amasty**

[FEATURE REQUEST](#) Need help with the settings? Please consult the [user guide](#) to configure the extension properly.

General Settings ⌵

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

Display customer attributes on the "select 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 a customer attribute of 'Customer Group Selector' input type.

Login Settings

Login Settings



Login Attribute Selector
[store view]

Magento Default (email)

Login by username (username)

Login with phone number (phone)

Selected attributes will be used by customers to login. Only Login Attributes and Email may apply. Note that it is a good practice to make Login Attributes visible and editable at "Create New Customer Account" and "Edit Account Information" forms. Also, it may be a good idea to modify the template that is used to restore password so it reminds customers of their login attributes.

Modify Field Title on the Login Page [store view] ?

Modify Notice on the Login Page [store view] ?

Add Notice to Login Attributes [store view]

Default Region for Phone Number [store view]

Use Geo IP to Process Phone Numbers [store view]

This setting is used to process phone number correctly

This setting is used to process phone number correctly

Login Attribute Selector - Selected attributes will be used by customers to login. Only Login Attributes and Email may apply. Note that it is a good practice to make Login Attributes visible and editable at "Create New Customer Account" and "Edit Account Information" forms.

Modify Field Title on the Login Page - This option allows you to modify the field title. Please, set 'Yes' or 'No' option upon your needs.

Modify Notice on the Login Page - If the option is set to 'Yes' modify the notice on the Login Page

Add Notice to Login Attributes - Adds notices to attributes that are set to use as login to notify customers. Notices are displayed at "Create New Customer Account" and "Edit Account Information" forms.

Default Region for Phone Number - This setting is used to process a phone number correctly. You can choose a needed country from the drop-down list.

Use Geo IP to Process Phone Numbers - This option allows you to use Geo Ip feature to process a phone number correctly.

Login Attribute Creation

To create a new attribute please go to **Customers → Customer Attributes → Manage Login**

Attributes. On this grid, you can add new attributes and edit already created ones. To add an attribute, please click the Add New Attribute button.

Login Attributes

demouser ▾

Customer Attributes Add New Attribute

Filters
 Default View ▾
 Columns ▾

2 records found

20
▾
per page
<
1
of 1
>

ID ↓	Code	Label	Type	Sorting Order	Show on the Customers Grid	Show on the Orders Grid	Show on the Order View page	Show on the Account Information page	Show on the Registration page	Action
1	phone	Login with phone number	Phone Number	1	Yes	Yes	Yes	Yes	Yes	Edit
2	username	Login by username	Text Field	2	Yes	Yes	Yes	Yes	Yes	Edit

Login Attribute Configuration

New Login Attribute ← Back Save ▾

Default Label *

Attribute Code *

For internal use. Must be unique with no spaces. Please use only lowercase letters and underscores. It is not recommended to use digits, other symbols or uppercase letters since it may cause unwanted issues or undesired behavior and break the import functionality.

Store View *

All Store Views
Main Website
Main Website Store
Default Store View

Type * Text Field ▾

Values Required No

Input Validation

None ▾
None
Decimal Number
Integer Number
Letters
Letters (a-z, A-Z) or Numbers (0-9)

Attribute Configuration

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.

Type - choose between two input types of login option depending on your specific needs:

- **Text Field** option is suitable for username, Id or any other text login;
- **Phone Number** option provides customers with login by the phone.

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.

Attribute Configuration

Select pages on which the attribute will be displayed. Specify login attribute display order.

Attribute Configuration

Show on the Customers Grid	<input type="checkbox"/> No	Attribute names and attribute values will not be counted as Keywords for "Search by keyword" feature
Show on the Orders Grid	<input type="checkbox"/> No	
Show on the Order View page	<input type="checkbox"/> No	In the Account Information block at the Backend
Show on the Account Information page	<input checked="" type="checkbox"/> Yes	
Show on the Registration page	<input checked="" type="checkbox"/> Yes	
Show on the Shipping page	<input type="checkbox"/> No	Let customers register during checkout using this attribute as a login option. This functionality is available only with the Amasty One Step Checkout extension
Sorting Order	<input type="text"/>	The order to display field on frontend
Placeholder	<input type="text"/>	Give your customers a hint on how login attribute should look like. For example, a phone number in the international format.

Login Attributes Display on the Backend

Show login attributes on the Customers grid. Apart from that, you can display login attributes on the order grid as well as on the order info page.

Account Created in	Date of Birth	Tax VAT Number	Login with phone number	Gender	Action	Login by username	I want to participate in Reseller Program
Default Store View	Dec 15, 1973		+15552293326	Female	Edit	Veronica	
Default Store View			+12025550184		Edit	verco	No
Default Store View			+13373879728		Edit	John123	No
Default Store View			+15097736294		Edit	Michael1979	Yes

	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Allocated sources	Braintree Transaction Source	Login with phone number	Login by username
<input type="checkbox"/>	000000002	Main Website Main Website Store Default Store View	Feb 9, 2021 10:43:19 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Closed	View	Default Source		+15552293326	Veronica
<input type="checkbox"/>	000000001	Main Website Main Website Store Default Store View	Feb 9, 2021 10:43:18 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	View	Default Source		+15552293326	Veronica

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

Account Information

Login with phone number *

Login by username *

Associate to Website * ?

Group *

Disable Automatic Group Change Based on VAT ID

Login Attributes Display on the Frontend

Show Login Attributes on the Creating Account page.

Password *

Password Strength: No Password

Confirm Password *

* Required Fields

Login with phone number *

This attribute may be used to login

Login by username *

This attribute may be used to login

Show Login Attributes on the Login page.

Customer Login

Registered Customers

If you have an account, sign in with your email address, phone number or nickname

Email / Phone Number / Nickname *

Password *

Sign In

[Forgot Your Password?](#)

* Required Fields

From:

<https://stg.amasty.net/docs/> - **Amasty Extensions FAQ**

Permanent link:

https://stg.amasty.net/docs/doku.php?id=magento_2:customer_attributes



Last update: **2021/07/26 14:10**