

Customer Approval for Magento 2

User Guide

Version 1.0

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I) Introduction

Customer Approval extension for Magento 2 helps store owners to manage the status of new customer account registrations through many outstanding features.

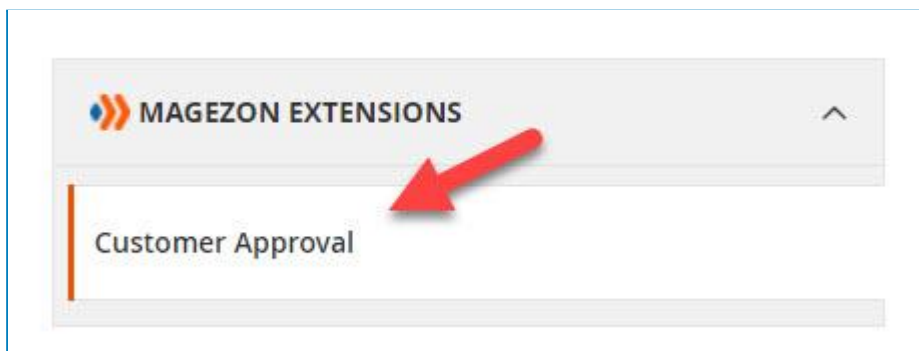
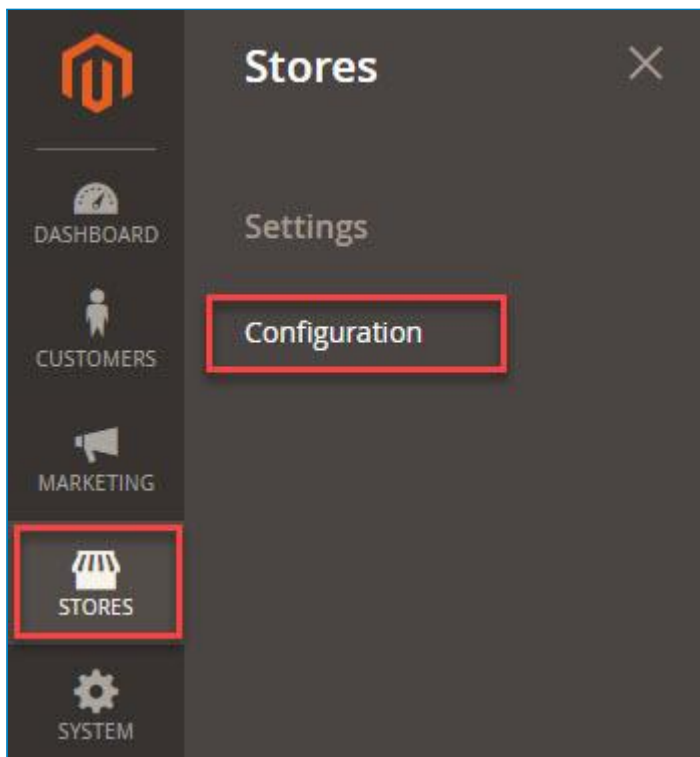
- Edit & Approve/Reject New Account Registrations.
- Automatic & Manual Approval.
- Notify Admin Of New Customer Accounts Via Emails.
- Inform Customers By Emails And Notifications After Their Registrations.
- Customize Email Templates To Customers.
- Customize Notifications To Customers.

II) Where to Find Extension

1. Configuration

After downloading and installing the extension, from the backend, navigate by this path:

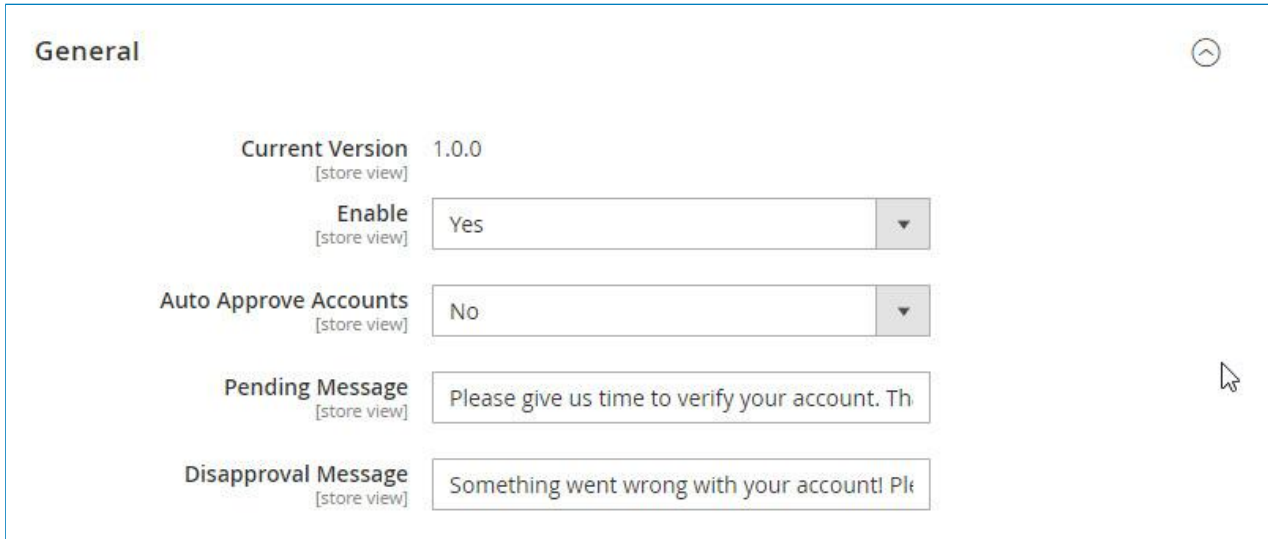
Stores > Settings > Configuration > Magezon Extensions > Customer Approval.



2. General Settings

In **General** tab, the **Current Version** shows the newest version of the extension.

Choose **Yes** in **Enable** to enable the module.



The screenshot shows the 'General' settings tab for the Customer Approval extension. The settings are as follows:

Setting	Value
Current Version	1.0.0
Enable	Yes
Auto Approve Accounts	No
Pending Message	Please give us time to verify your account. Th
Disapproval Message	Something went wrong with your account! Plk

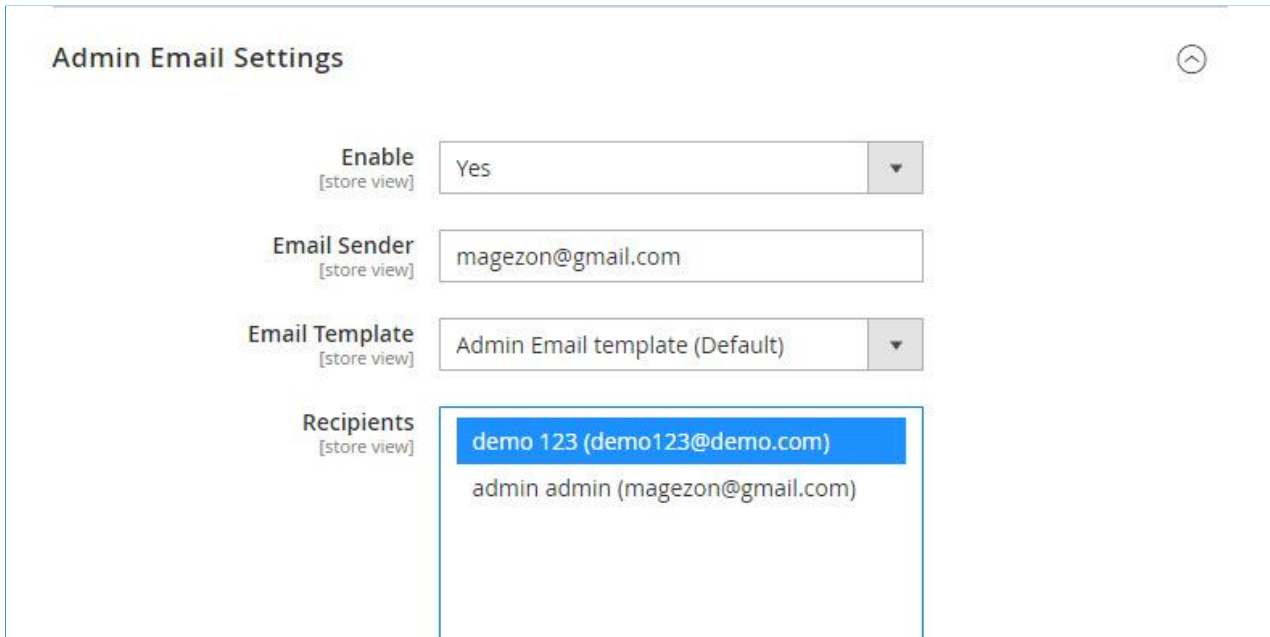
Auto Approve Accounts: Choose Yes/ No to automatically or manually approve the registration.

Pending Message: Fill in the content of notification when register request is on pending status, as soon as customers register.

Disapproval Message: Fill in the content of notification when customers try to login with rejection.

3. Admin Email Settings

Enable: Choose Yes/No to allow/ not to allow sending emails to store administrators when customer registers.



The screenshot shows the 'Admin Email Settings' configuration panel. It includes the following fields:

- Enable:** A dropdown menu with 'Yes' selected.
- Email Sender:** A text input field containing 'magezon@gmail.com'.
- Email Template:** A dropdown menu with 'Admin Email template (Default)' selected.
- Recipients:** A list of email addresses. The first entry, 'demo 123 (demo123@demo.com)', is highlighted in blue. The second entry is 'admin admin (magezon@gmail.com)'.

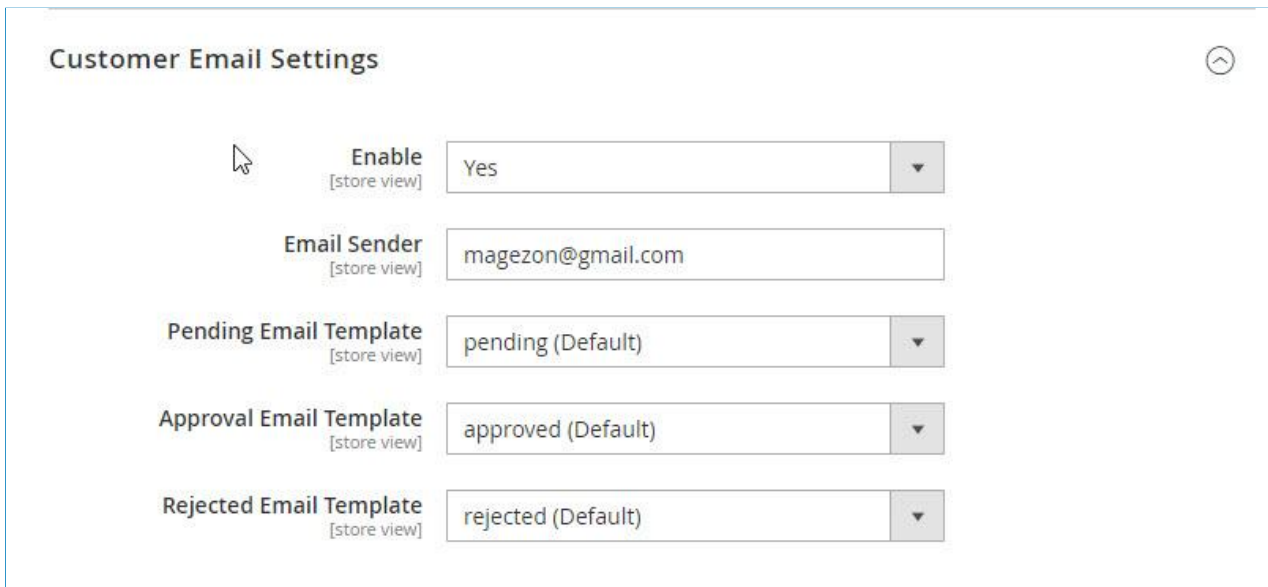
Email Sender: Fill in the email address of the sender.

Email Template: Pick the template you want to send. Admin Email template is in default.

Recipients: All admin's emails of the store are displayed. You can choose one or more admins to be recipients.

4. Customer Email Settings

Enable: Choose Yes/No to allow/ not to allow sending emails to customers when pending, approval or rejection.



The screenshot shows the 'Customer Email Settings' configuration panel. It includes a title bar with a close button, a mouse cursor, and five settings:

- Enable** [store view]: A dropdown menu set to 'Yes'.
- Email Sender** [store view]: A text input field containing 'magezon@gmail.com'.
- Pending Email Template** [store view]: A dropdown menu set to 'pending (Default)'.
- Approval Email Template** [store view]: A dropdown menu set to 'approved (Default)'.
- Rejected Email Template** [store view]: A dropdown menu set to 'rejected (Default)'.

Email Sender: Fill in the email address of the sender.

Pending Email Template: Pick the email template to inform the customers that their registration is being processed.

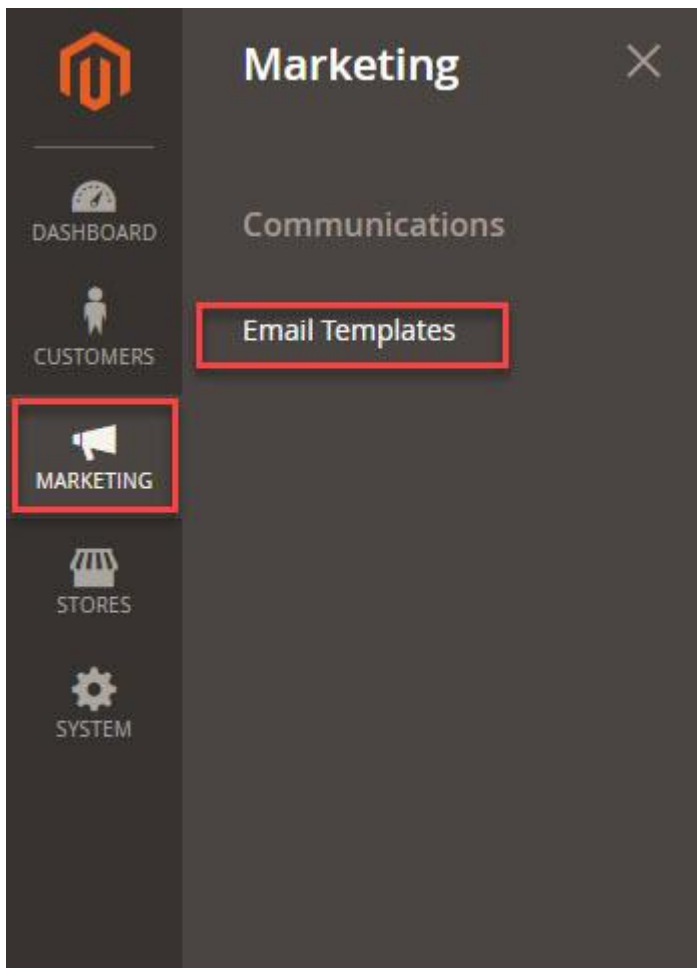
Approval Email Template: Pick the email template to inform the customer that their registration has been approved.

Rejected Email Template: Pick the email template to inform the customer that their registration has been rejected.

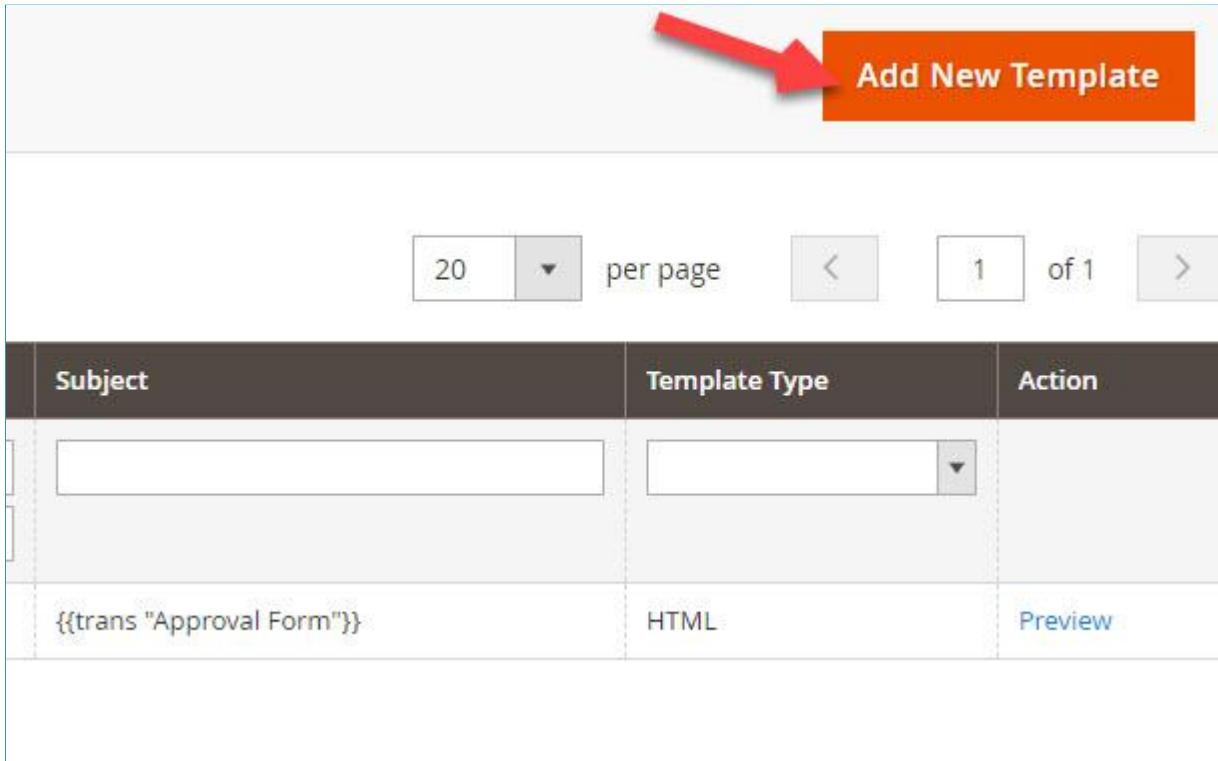
III) Email Templates

1. Add New Template

Go to **Marketing > Communications > Email Templates**.



Click on the **Add New Template** button on the right side. You will be redirected to the **New Template** page.

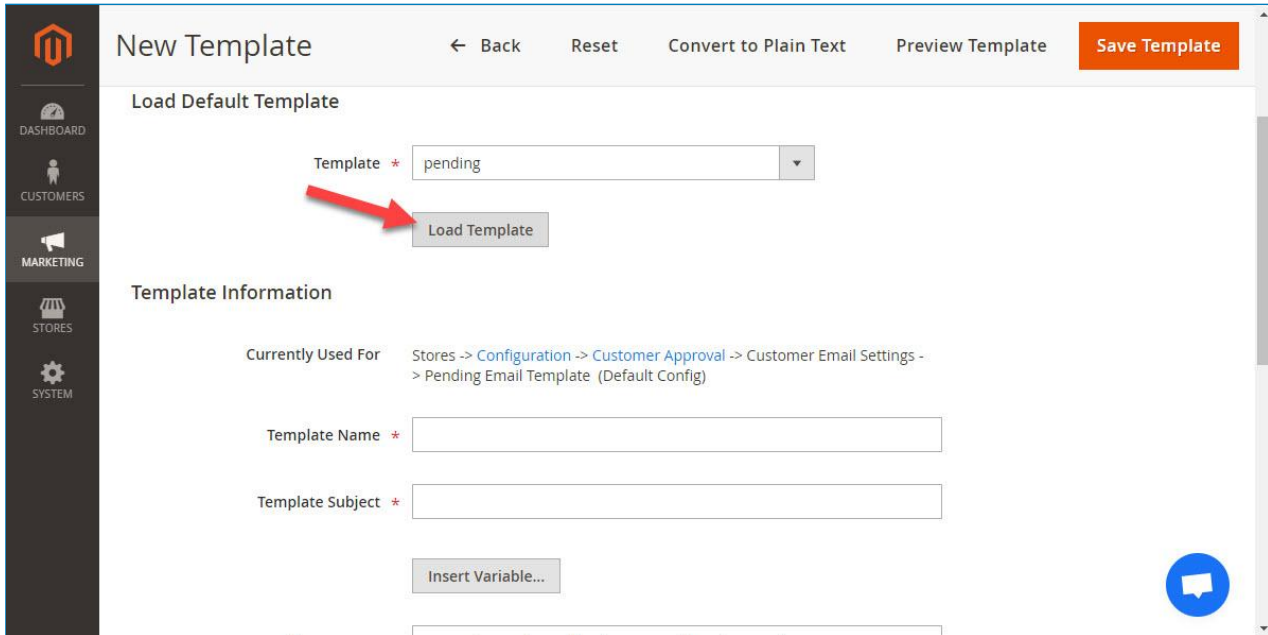


Add New Template

20 per page 1 of 1

Subject	Template Type	Action
<input type="text"/>	<input type="text"/>	
{{trans "Approval Form"}}	HTML	Preview

- In case you want to use the existing email template, expand the **Template on Load Default Template** section, choose the pending, approved and rejected templates in turn. Click on the **Load Template** button.
- In case you want to create a new template by yourself, skip **Load Default Template**.



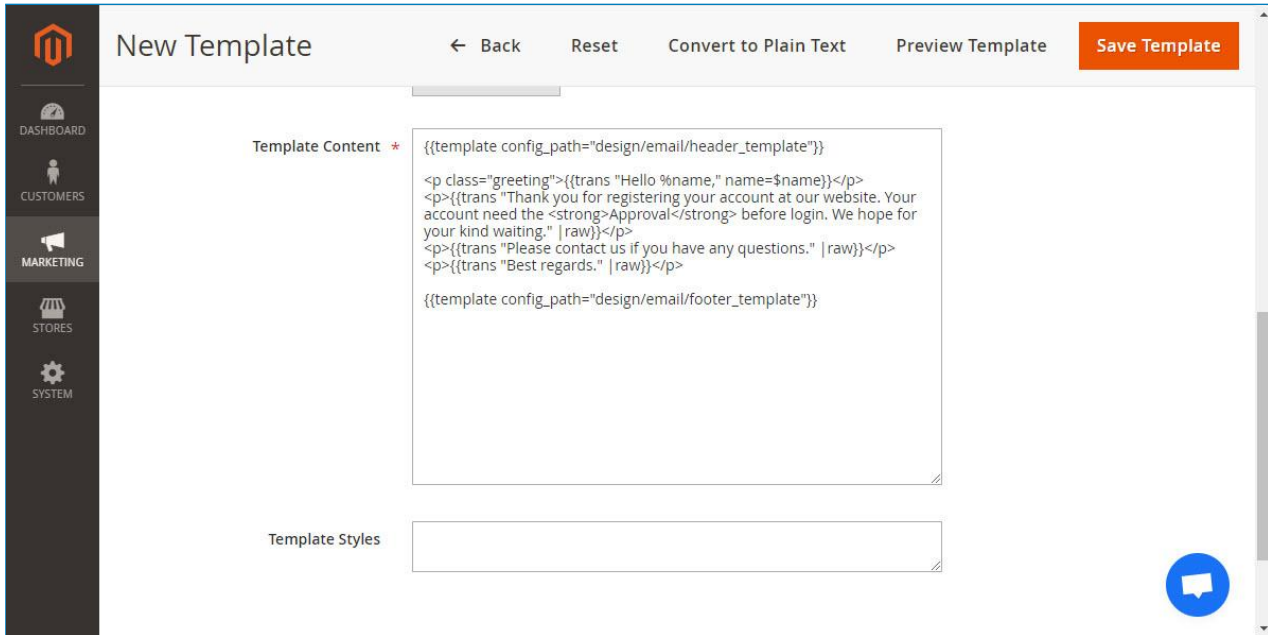
Go to the **Template Information**. Fill the blank template below:

Template Name: Fill in the suitable name.

Template Subject: Fill in the suitable subject.

Template Content:

- In case you use the default template, Template Content is completed automatically.
- In case you create your own template, click on the Insert Variable to design the template.



New Template ← Back Reset Convert to Plain Text Preview Template **Save Template**

Template Content *

```


{{template config_path="design/email/header_template"}}

<p class="greeting">{{trans "Hello %name," name=$name}}</p>
<p>{{trans "Thank you for registering your account at our website. Your account need the <strong>Approval</strong> before login. We hope for your kind waiting." |raw}}</p>
<p>{{trans "Please contact us if you have any questions." |raw}}</p>
<p>{{trans "Best regards." |raw}}</p>

{{template config_path="design/email/footer_template"}}

```

Template Styles

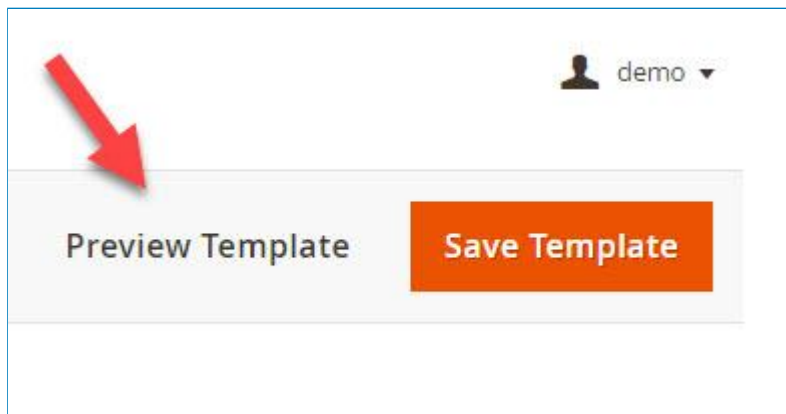


Save Template when you complete.

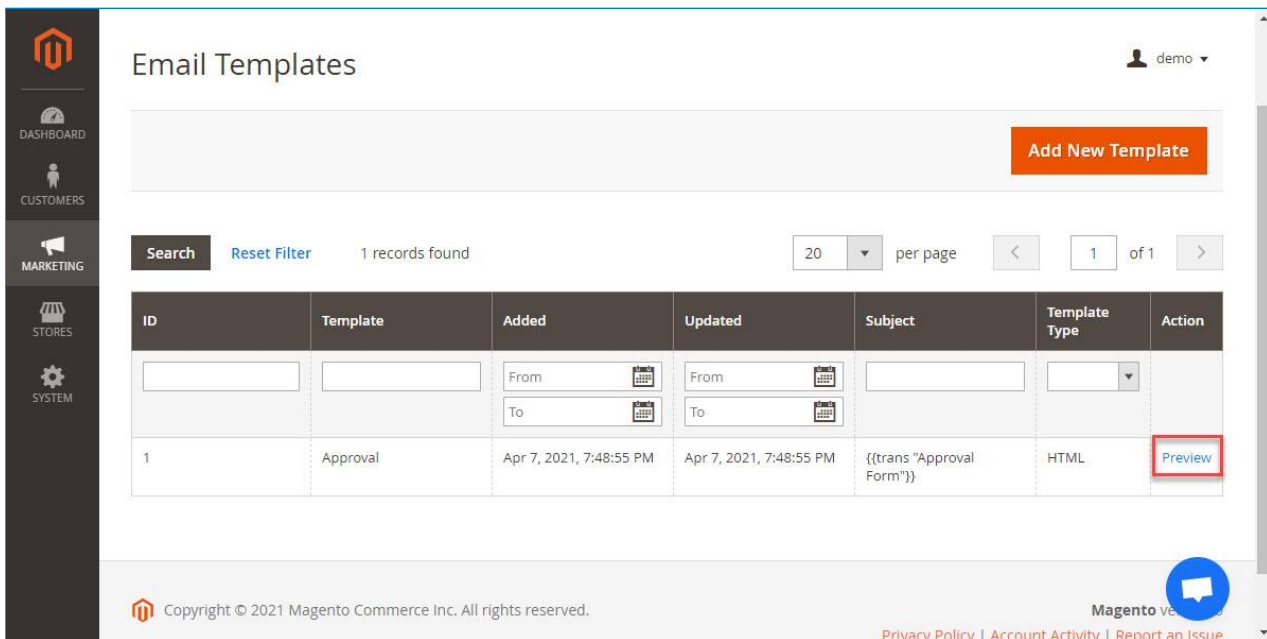
2. Preview Template

After you finish **Add New Template** step, all templates are listed on **Email Templates Grid**. There are two methods to preview email templates.

Method 1: **Preview Template** on **Template Edit** page.



Method 2: Go to **Marketing > Communications > Email Templates**. Click on the small **Preview** button to check it.



The screenshot shows the 'Email Templates' grid in the Magento admin interface. The grid has a search bar, a 'Reset Filter' button, and a '1 records found' status. The grid displays one record with the following details:

ID	Template	Added	Updated	Subject	Template Type	Action
1	Approval	Apr 7, 2021, 7:48:55 PM	Apr 7, 2021, 7:48:55 PM	{{trans "Approval Form"}}	HTML	Preview

The 'Preview' button in the 'Action' column is highlighted with a red box. The footer of the page includes the copyright notice 'Copyright © 2021 Magento Commerce Inc. All rights reserved.' and the Magento version 'Magento ve'.

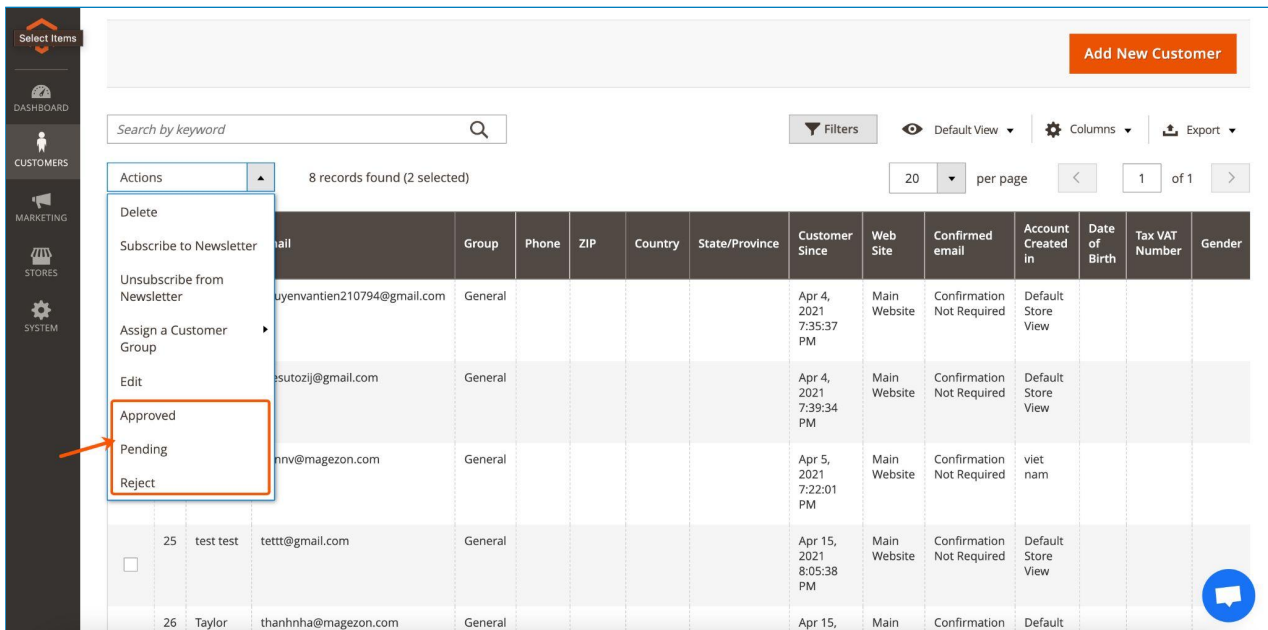
IV) Customer Approval

Go to **Customers > All Customers**, you will see all customer requests.

1. Customer Grid

Once the customer registers, the pending request will be shown on Customer Grid for admin to preview, approve or reject. You also can find the status of requests displayed on the Status column.

On the first column in the Grid, you can tick on the checkbox of requests you want to switch status and expand Actions above to change the status.

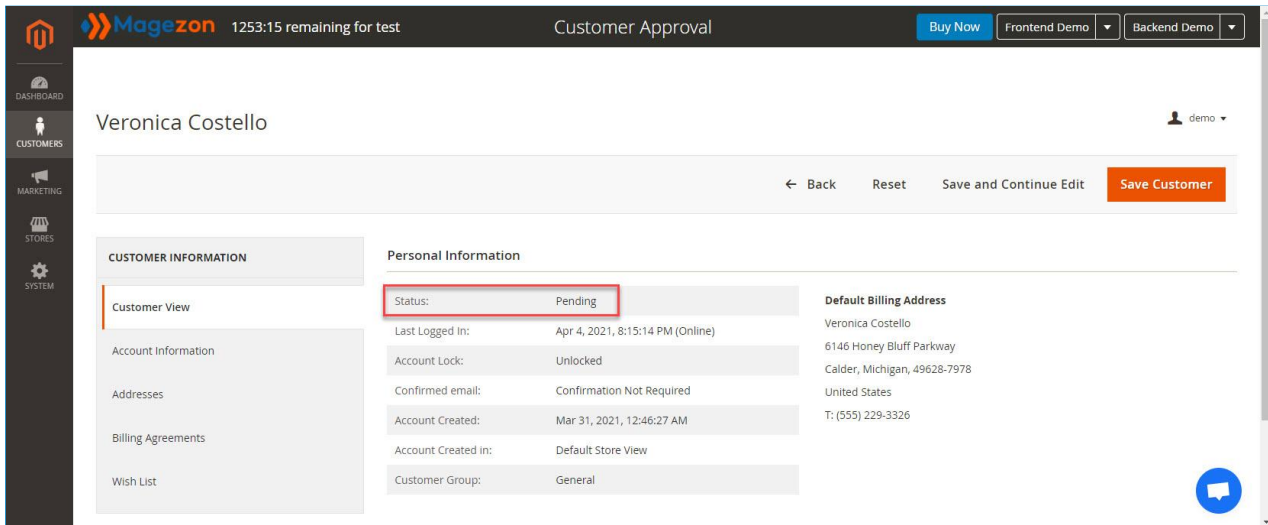


The screenshot shows the Magezon Customer Grid interface. At the top right, there is an "Add New Customer" button. Below it is a search bar labeled "Search by keyword" and a "Filters" button. The grid displays 8 records, with 2 selected. The table has the following columns: ID, Name, Email, Group, Phone, ZIP, Country, State/Province, Customer Since, Web Site, Confirmed email, Account Created in, Date of Birth, Tax VAT Number, and Gender. An "Actions" dropdown menu is open over the first two rows, showing options: Delete, Subscribe to Newsletter, Unsubscribe from Newsletter, Assign a Customer Group, Edit, Approved (highlighted with an orange box and arrow), Pending, and Reject. The data in the table is as follows:

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
		uyenvantien210794@gmail.com	General					Apr 4, 2021 7:35:37 PM	Main Website	Confirmation Not Required	Default Store View			
		esutozij@gmail.com	General					Apr 4, 2021 7:39:34 PM	Main Website	Confirmation Not Required	Default Store View			
		nnv@magezon.com	General					Apr 5, 2021 7:22:01 PM	Main Website	Confirmation Not Required	viet nam			
25	test test	tett@gmail.com	General					Apr 15, 2021 8:05:38 PM	Main Website	Confirmation Not Required	Default Store View			
26	Taylor	thanhnhha@magezon.com	General					Apr 15,	Main	Confirmation	Default			

2. Customer Edit

Click on the **Edit** on the right side. On the **Customer View**, you can see the status of the account registration.




The screenshot shows the Magezon Customer Approval interface. The top navigation bar includes the Magezon logo, a timer (1253:15 remaining for test), the page title 'Customer Approval', and buttons for 'Buy Now', 'Frontend Demo', and 'Backend Demo'. The left sidebar contains navigation options: DASHBOARD, CUSTOMERS, MARKETING, STORES, and SYSTEM. The main content area displays the 'Customer View' for 'Veronica Costello'. At the top right of the main area, there is a user profile icon labeled 'demo'. Below this, there are action buttons: 'Back', 'Reset', 'Save and Continue Edit', and 'Save Customer'. The 'CUSTOMER INFORMATION' section is expanded to show 'Customer View'. The 'Personal Information' section is highlighted with a red box and contains the following data:


Personal Information		Default Billing Address
Status:	Pending	Veronica Costello
Last Logged In:	Apr 4, 2021, 8:15:14 PM (Online)	6146 Honey Bluff Parkway
Account Lock:	Unlocked	Calder, Michigan, 49628-7978
Confirmed email:	Confirmation Not Required	United States
Account Created:	Mar 31, 2021, 12:46:27 AM	T: (555) 229-3326
Account Created in:	Default Store View	
Customer Group:	General	

Below the 'Personal Information' section, there is a 'Default Billing Address' section with the same address details. The left sidebar also shows other sections under 'CUSTOMER INFORMATION': Account Information, Addresses, Billing Agreements, and Wish List. A blue chat bubble icon is visible in the bottom right corner of the interface.

Besides, go to **Account Information**, you also can change the status of the account here.

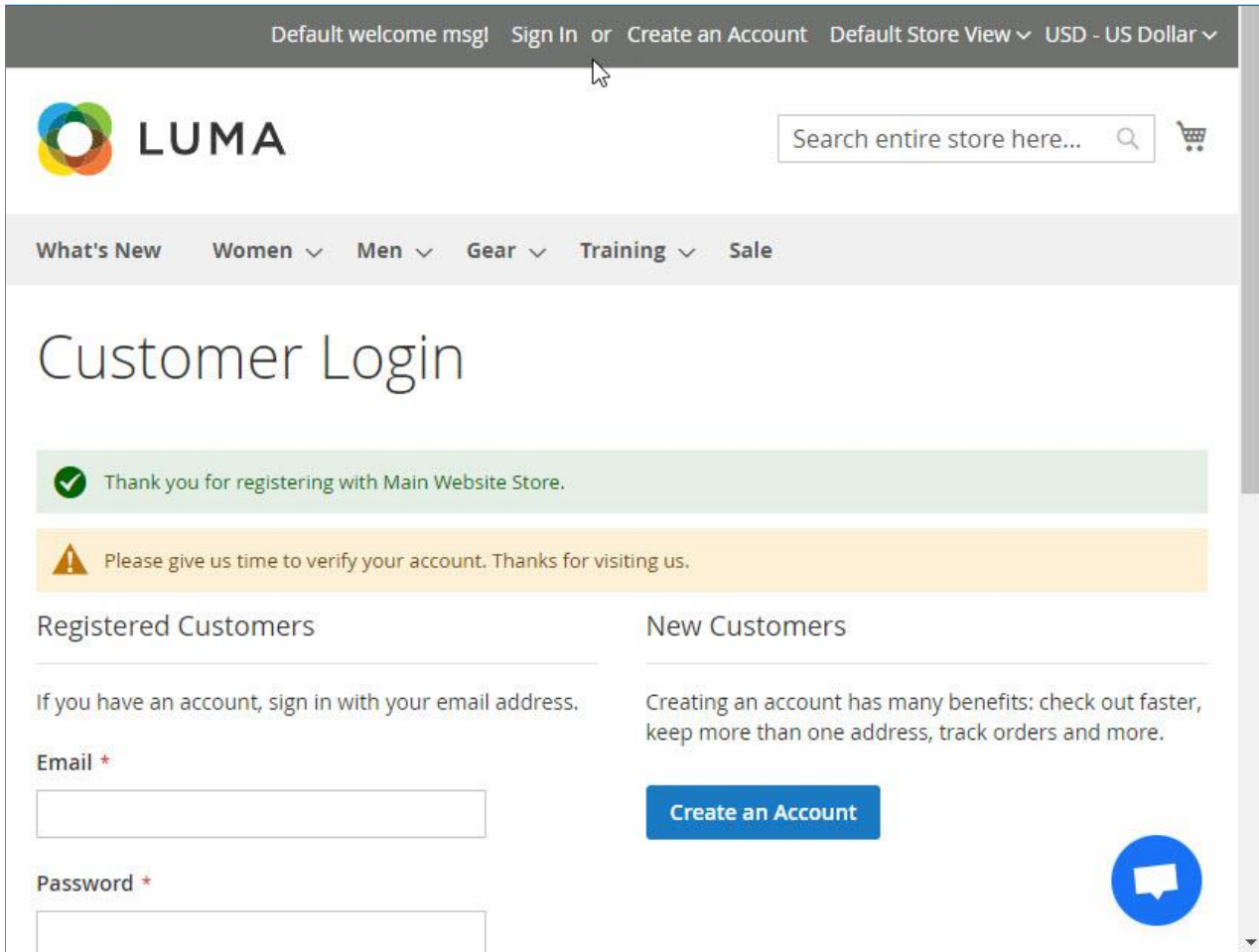
CUSTOMER INFORMATION

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

Approval Status 

V) Frontend

As soon as a customer creates an account, and **Auto Approve Accounts** is unavailable, there will be a Pending notification appearing.



The screenshot shows the LUMA website frontend. At the top, there is a navigation bar with links for "Default welcome msg!", "Sign In or Create an Account", "Default Store View", and "USD - US Dollar". The LUMA logo is on the left, and a search bar is on the right. Below the navigation bar, there are menu items: "What's New", "Women", "Men", "Gear", "Training", and "Sale". The main content area is titled "Customer Login". There are two notification banners: a green one with a checkmark saying "Thank you for registering with Main Website Store." and a yellow one with a warning icon saying "Please give us time to verify your account. Thanks for visiting us." Below the notifications, there are two columns: "Registered Customers" and "New Customers". The "Registered Customers" column has a text prompt "If you have an account, sign in with your email address." and input fields for "Email" and "Password". The "New Customers" column has a text prompt "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. A blue chat bubble icon is in the bottom right corner.

At the same time, they also receive a Welcome and Pending email.



Hello Taylor Nguyen,

Thank you for registering your account at our website. Your account need the **Approval** before login. We hope for your kind waiting.

Please contact us if you have any questions.

Best regards.

Then, the store admin will receive a notification email.



Hello ,

The account has been registered. Please go to admin and approve it.

Admin approves or rejects new accounts, there will be Approval or Disapproval emails sent to customers.



Hello Taylor Nguyen,

Congratulations! Your account has been **approved**

From now on, you can surf our website to explore a lot of interesting things with your account information as below:

- **Name:** Taylor Nguyen
- **Email:** thanhnhha@magezon.com
- **Password:** *The one you set when you registered your account*

To sign in to our site, use these credentials during checkout or on the [My Account](#) page:



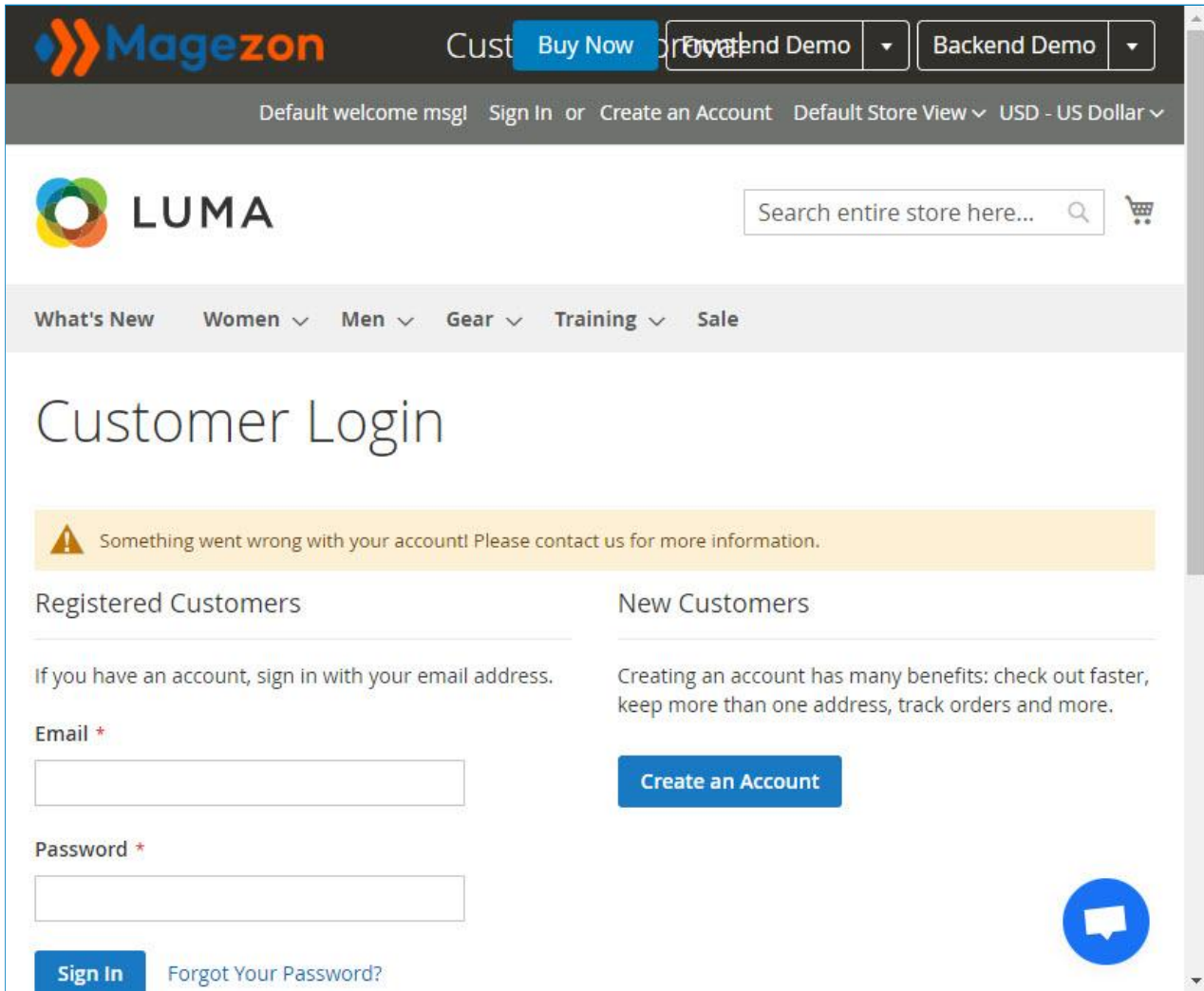
Hello Taylor Nguyen,

Thank you for registering your account at our website. Unfortunately, we **cannot accept** your account.

Please contact us for more information.

Thank you

When this customer signs in, the Pending notification will be displayed when the request is on pending status. In case the registering request is disapproved, there will be a Disapproved notification.



The screenshot shows the LUMA website's customer login page. At the top, there is a navigation bar with the Magezon logo, a 'Buy Now' button, and dropdown menus for 'Frontend Demo' and 'Backend Demo'. Below this is a secondary navigation bar with 'Default welcome msg!', 'Sign In or Create an Account', 'Default Store View', and 'USD - US Dollar'. The main header features the LUMA logo, a search bar, and a shopping cart icon. A navigation menu includes 'What's New', 'Women', 'Men', 'Gear', 'Training', and 'Sale'. The main content area is titled 'Customer Login' and contains a yellow error message: 'Something went wrong with your account! Please contact us for more information.' Below the error message are two columns: 'Registered Customers' and 'New Customers'. The 'Registered Customers' column has a sub-header 'If you have an account, sign in with your email address.' and fields for 'Email *' and 'Password *', with a 'Sign In' button and a link for 'Forgot Your Password?'. The 'New Customers' column has a sub-header 'Creating an account has many benefits: check out faster, keep more than one address, track orders and more.' and a 'Create an Account' button. A blue chat bubble icon is located in the bottom right corner.

VI) Support

If you have any questions or need any support from our team, please feel free to contact us via the following ways. We will get back to you within 24 hours after you submit your request.

- Submit [contact form](#).
- Email us at support@magezon.com.
- Submit a [ticket](#).
- Contact us through [Skype](#): support@magezon.com.
- Contact us via live chat on our website: magezon.com.