

# Magento 2

# Customer Attributes

## User Guide

Version 1.0

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## I) Introduction

This document is the user guide for **Magento 2 Customer Attributes Extension**. It will help you understand the extension's functionality and learn how to use it.

Magento 2 Customer Attributes Extension has 2 types:

- **Customer Attributes** help you to get any information from potential customers as desired. With such information customers fill on the Registration page, you'll have more chances to learn about them. A good way to develop effective marketing strategies.
- **Customer Address Attributes** enable you to collect customer addresses that gives you great support in sales orders. Particularly, users can flexibly create unlimited attribute fields in checkout form so that customers can give store owners more details of their addresses and order requests.

### KEY FEATURES

- Create unlimited customer and customer address attributes
- Easily manage attributes right from the backend grid
- Various input types supported
- Set input validation rules for **Text Field**
- Display attributes in many positions of backend and front-end
- Set the attributes displayed "required" or "optional"
- Manage the labels of attributes in desired store views
- Support analytics for select-input types
- Create unlimited dependable customer attributes
- Import/export customer data with custom attributes
- Include customer attributes in emails for maximum tracking

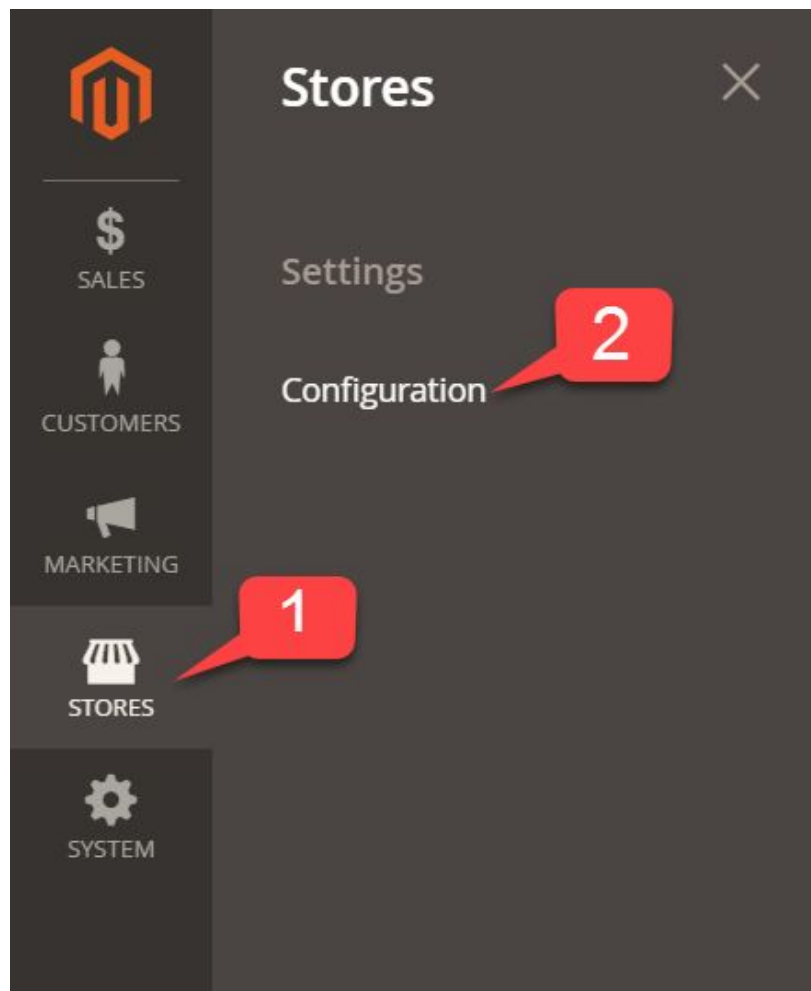
## II) Configuration

Before creating an attribute, you need to configure **Customer Attributes** and **Customers**.

Step 1: Determine where to configure

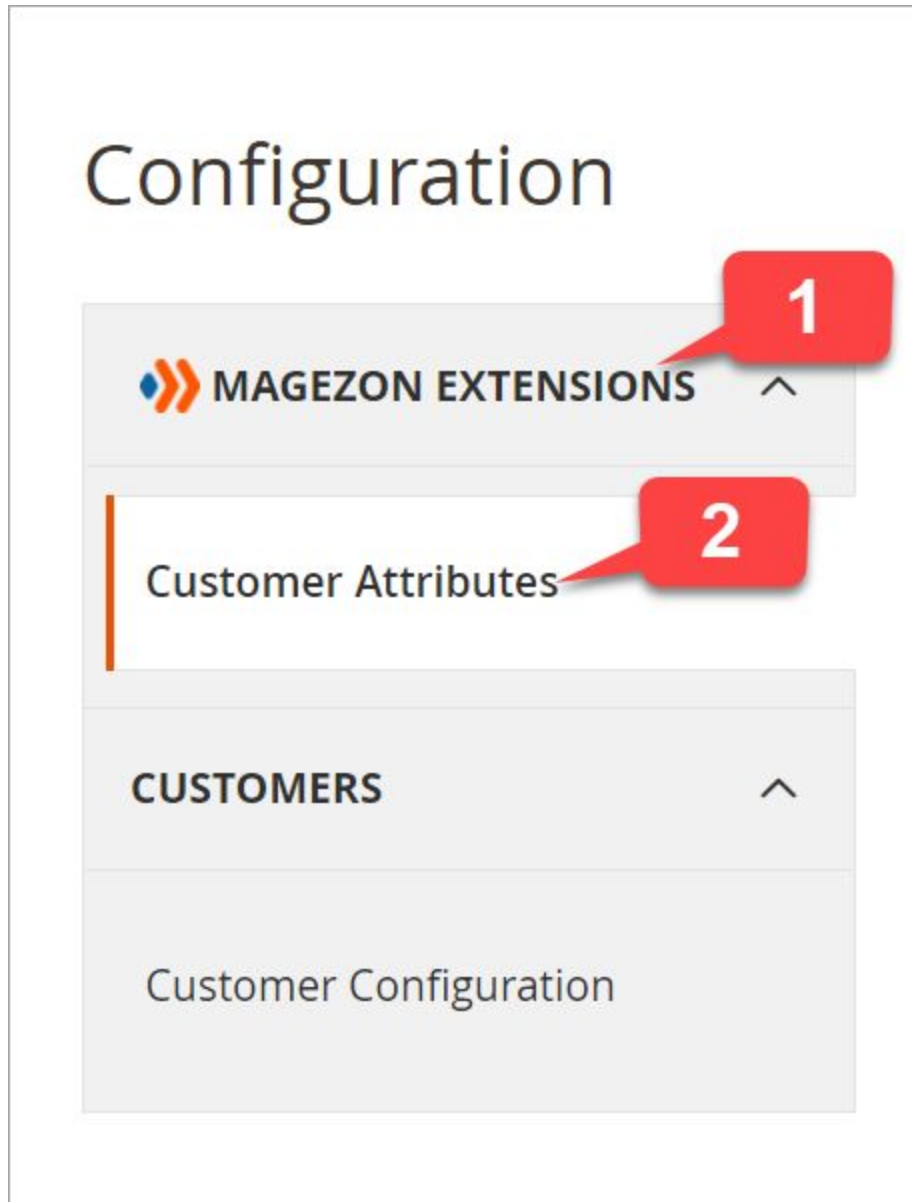
After installing the extension, navigate to **Store** → **Settings** → **Configuration**.

Or, go to **Customers** → **Customer Attributes** → **Settings**.



## Step 2: Configure Customer Attributes

1. Go to **Magezon Extensions** → **Customer Attributes**.



You will be redirected to the page where to configure the extension:

**General Settings**

---

**Avatar Settings**

---

**Customer Account Dashboard Settings**

---

**Input Type Settings**

## 2.1. General Settings

### General Settings

**Current Version** 1.0.0  
[store view]

**Enable Customer Attributes** Yes  
[store view]

**Display System Attributes** No  
[store view]

**Main Color** #4d4d4d  
[store view]

**Second Color** #00f794  
[store view]

**Preview Color**  Option1  Option2  Option3  
[store view]

Option1  Option2  Option3

No  Yes

- **Current Version** of this extension.
- **Enable Customer Attributes:** Choose **Yes/No** to enable/disable customer attributes/customer address attributes both in the frontend and backend.
- **Display System Attributes:** Choose **Yes/No** to display/not to display the default Magento attributes.
- **Main Color:** Set the main color for tick boxes/toggle switches of the options.
- **Second Color:** Set the second color for tick boxes/toggle switches of options.

**Pro tips:** These color options are added to the background and border of the tick boxes and toggle switches. By doing so, you can make your attribute values on the frontend more impressive and less boring. To choose colors that match together, visit [this website](#).

- **Preview Color:** You can see the color changes of the tick boxes /toggle switches right from this field.


## 2.2. Avatar Settings

### Avatar Settings

**Display Avatar**  
[store view] Yes

**Avatar**  
[store view] Your photo  
Avatar

**Default Avatar**  
[store view]

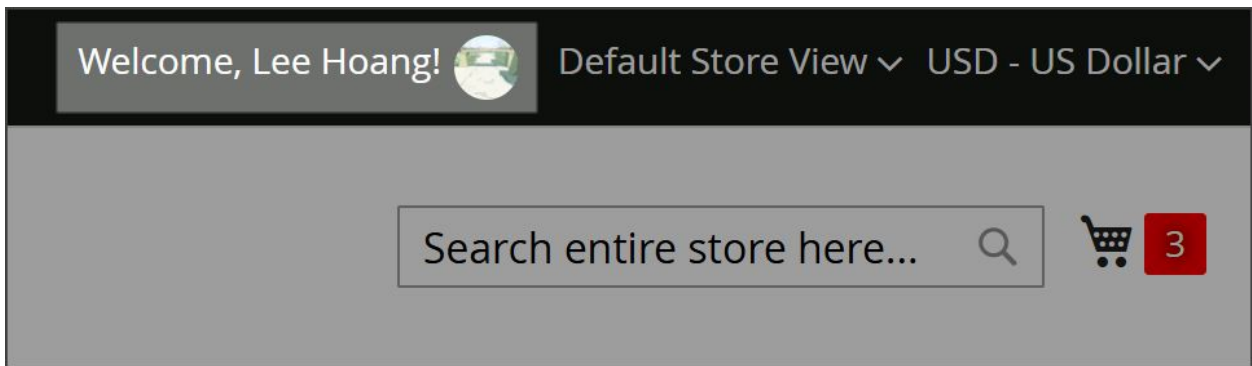


No file chosen  
 Delete Image  
Allowed file types: jpg, jpeg, gif, png

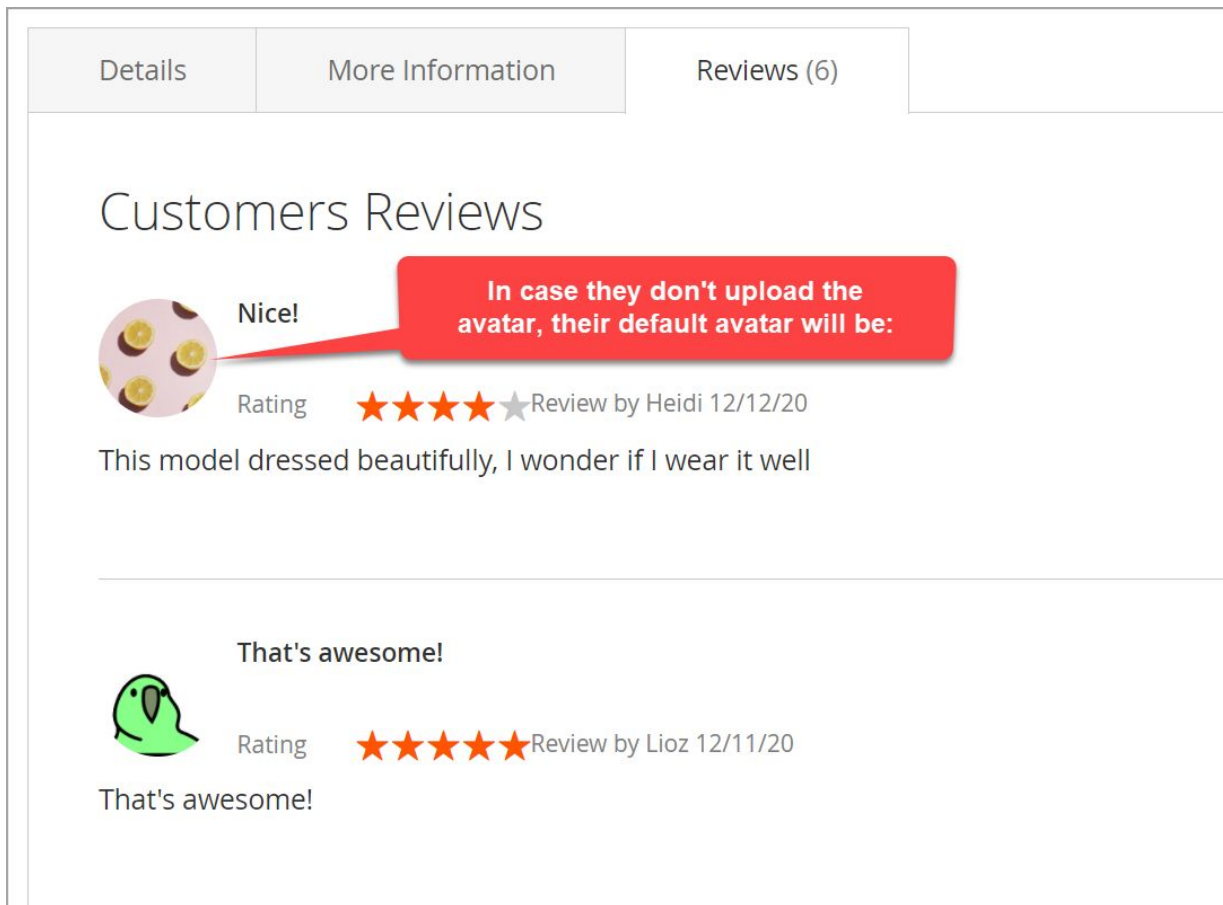
- **Display Avatar:** Choose **Yes/No** to display/not to display the account avatar.
- **Avatar:** To set an avatar, choose one of your image attributes.

**For example:** We have 2 attributes whose input types are image: **Avatar** and **Your Photo**. You can set one of them for customers to pick for their avatar. In case you choose **Your Photo**, their avatar is the image from **Your Photo**.





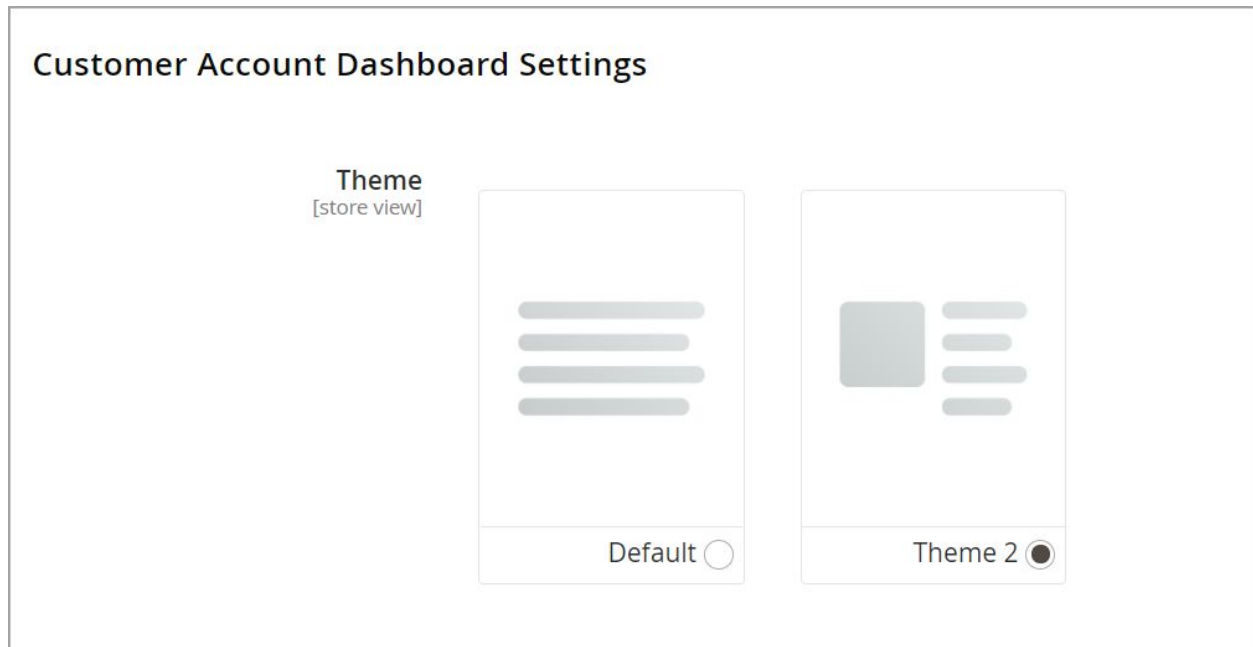
- **Default avatar:** If customers don't upload photos to any image attribute fields, users can freely choose any image as the customer default avatar.



### 2.3. Customer Account Dashboard Settings

In this section, you can set the theme for the Customer Account Dashboard page.

- **Default:** The default Magento theme for the Customer Account Dashboard page.
- **Theme 2:** The theme we design for this page, which looks better.



Below are the appearance of these themes:

- **Default theme:**

# My Account

Account Information

---

<b>Contact Information</b>	<b>Newsletters</b>
Lee Hoang roni_cost@example.com <a href="#">Edit</a>   <a href="#">Change Password</a>	You aren't subscribed to our newsletter. <a href="#">Edit</a>
<b>Additional Information</b>	
<b>Avatar</b>	<a href="#">View</a>
<b>Choose what Magezon extensions you like most</b>	Product Page PDF Builder
<b>Date of buying</b>	1969-12-01 00:00:00
<b>Extensions you are interested in</b>	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ
<b>Payment Preferences</b>	Debit Card

- **Theme 2:**

## My Account

### Account Information

#### Contact Information

Lee Hoang  
roni\_cost@example.com  
[Edit](#) | [Change Password](#)

#### Newsletters

You aren't subscribed to our newsletter.  
[Edit](#)

#### Additional Information



**Lee Hoang**  
roni\_cost@example.com

**Avatar:** 

**Choose what Magezon extensions you like most :** Product Page PDF Builder

**Date of buying:** Nov 30, 1969 04:00:00 PM

**Extensions you are interested in:** Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ

**Payment Preferences:** Debit Card

**Phone Number:** 0327200098

**Pick one of our coming soon products you need:** Customer Attributes

**Product Photo File:** [Download](#)

## 2.4. Input Type Settings

This section allows you to set the number of rows for the input type Textarea. The number must be an integer and ranges from 3 to 12. So, this field does not accept the number beyond the range.

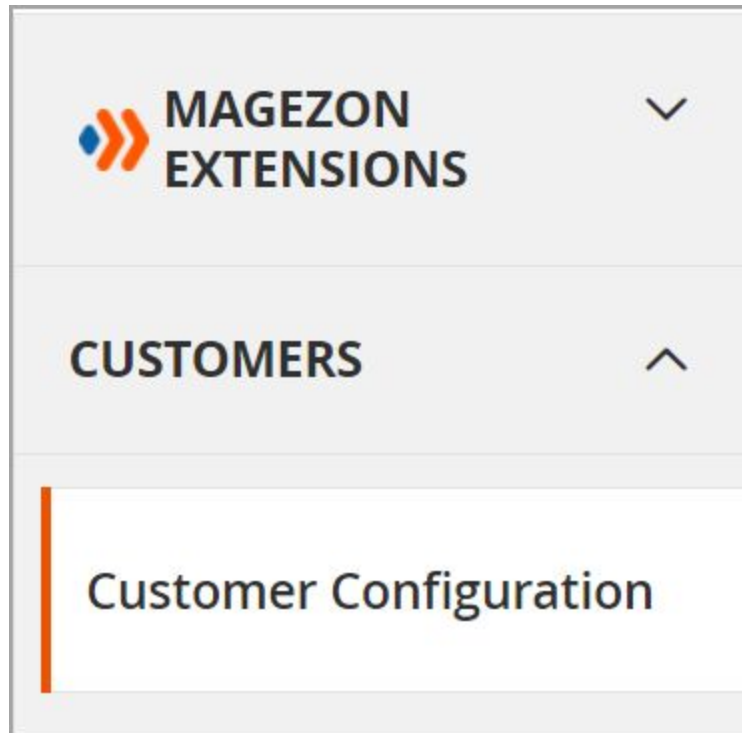
### Input Type Settings

**Textarea Row**  
[store view]

Integer number require. In range (3-12)

### Step 3: Configure Customers

Span **Magento Extensions** tab, choose **Customer Configuration**:



Now you are landing on the page **Configuration**:

## Configuration

demo ▾

Save Config

---

Account Sharing Options ▾

---

Online Customers Options ▾

---

Create New Account Options ▾

<p>Enable Automatic Assignment to Customer Group <small>[store view]</small></p>	<p>No ▾</p>	<p><input checked="" type="checkbox"/> Use system value</p>
<p>Default Group <small>[store view]</small></p>	<p>General ▾</p>	<p><input checked="" type="checkbox"/> Use system value</p>
<p>Default Value for Disable Automatic Group Changes Based on VAT ID <small>[global]</small></p>	<p>No ▾</p>	<p><input checked="" type="checkbox"/> Use system value</p>
<p>Show VAT Number on Storefront <small>[website]</small></p>	<p>No ▾</p>	<p><input checked="" type="checkbox"/> Use system value</p>

To show VAT number on Storefront, set Show VAT Number on Storefront option to Yes.

In this **Configuration** page, you can set customer attributes to display on templates of some different types of emails such as **Default welcome email, reset email template**.

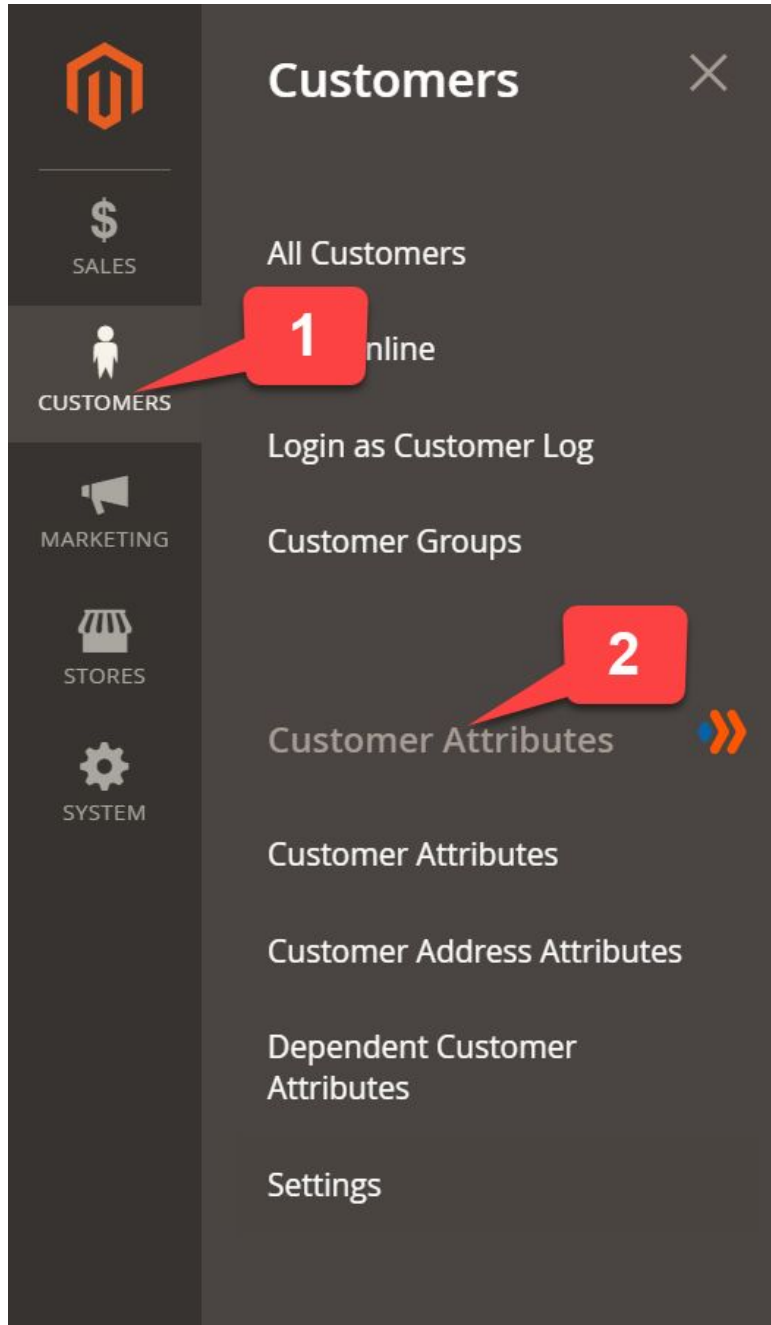
Specifically, you will create an email template that includes customer attributes. Then, at this **Configuration** section, you can set this new template as the default email template.

We will explain to you in detail in the section **IV) Apply Customer Attributes in Emails**.

### III) Create a Customer/Customer Address Attribute

#### 3.1. Get started

From the Admin Panel, navigate to **Customers** → **Customer Attributes**.





In the sidebar above, please focus on the first three tabs:

- **Customer Attributes**

This attribute type will help you get the customer information at the customer registration page. This is good for efficient marketing strategy and customer management.

- **Customer Address Attributes**

This type of attribute enables you to collect additional addresses and order preference from customers. They are shown in the checkout forms, address book and sales-related pages such as order, invoice, shipment, credit memos. This makes it much easier for the customer to check their information and receive their goods.

### **Dependent Customer Attributes**

You have to know 2 things about **Dependent Customer Attributes**:

- First, dependent attributes of this extension are used for customer attributes, not for customer address attributes.
- Second, it allows customers to create parent attributes and child attributes. Simply put, customers can select more alternatives **ONLY IF** choosing a parent value first.

Before getting started, keep in mind the following things for better workflow:

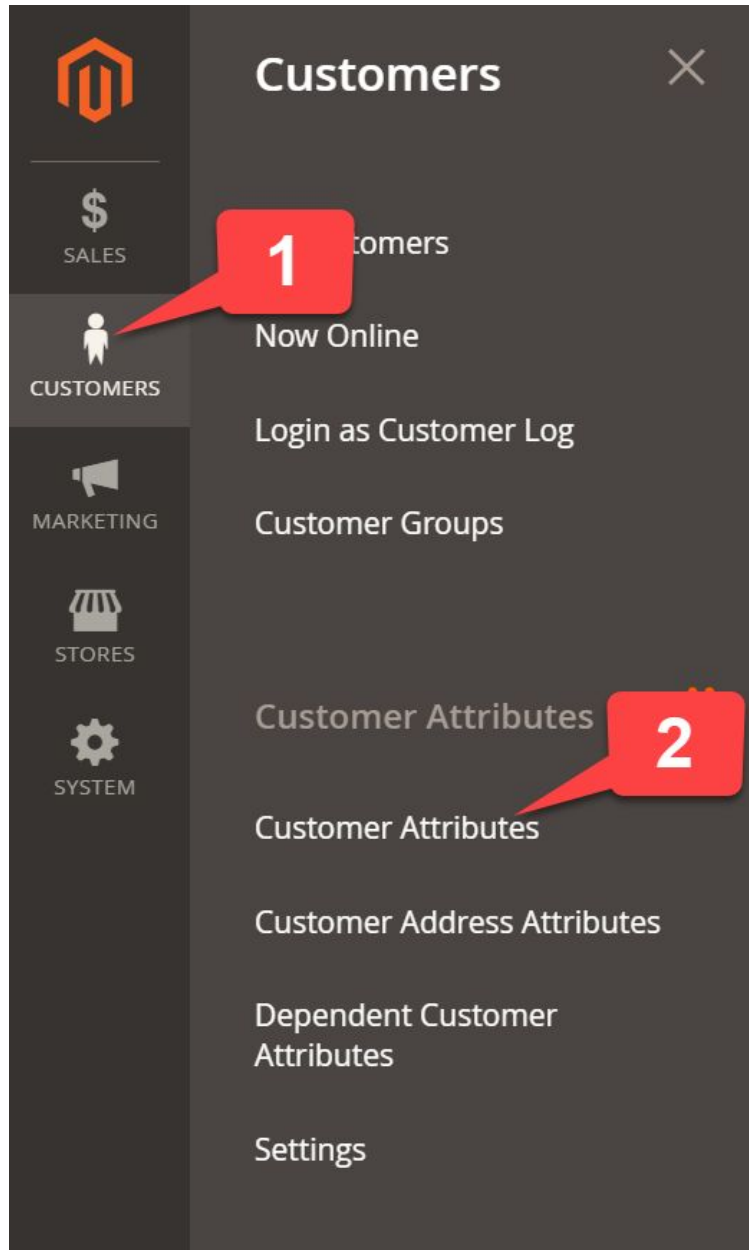


- **Back:** Click on **Back** if you want to get back to the **Customer/Customer Address Attribute Grid**.
- **Delete Attribute:** Click on this button if you want to delete the attribute. This option appears **ONLY WHEN** this attribute was created. In case you start creating a new attribute without saving, this option will not exist in this bar.
- **Reset:** Choose **Reset** for restoring the latest saved data.
- **Save and Continue Edit:** After you complete any section/field, you should save the data simply by clicking on this option. Meanwhile, you will be still right on this page to continue editing.
- **Save Attribute/Address:** Click **Save Attribute** when you complete the creation process. However, you will be redirected to the **Attributes Grid** page. This is the difference between choosing **Save and Continue Edit** and **Save Attribute**.

Let's start with the **Customer Attributes** tab.



### 3.2. Create a Customer Attribute

Go to **Customers** → **Customer Attributes** → **Customer Attributes**.



Then, you will be redirected to the Customer Attributes Grid which shows all customer attributes. You can easily manage them by filter, column, delete, update status, etc.

To add a customer attribute, click **Add New Attribute** on the upper right corner.

 Customer Attributes ▾
 demo ▾

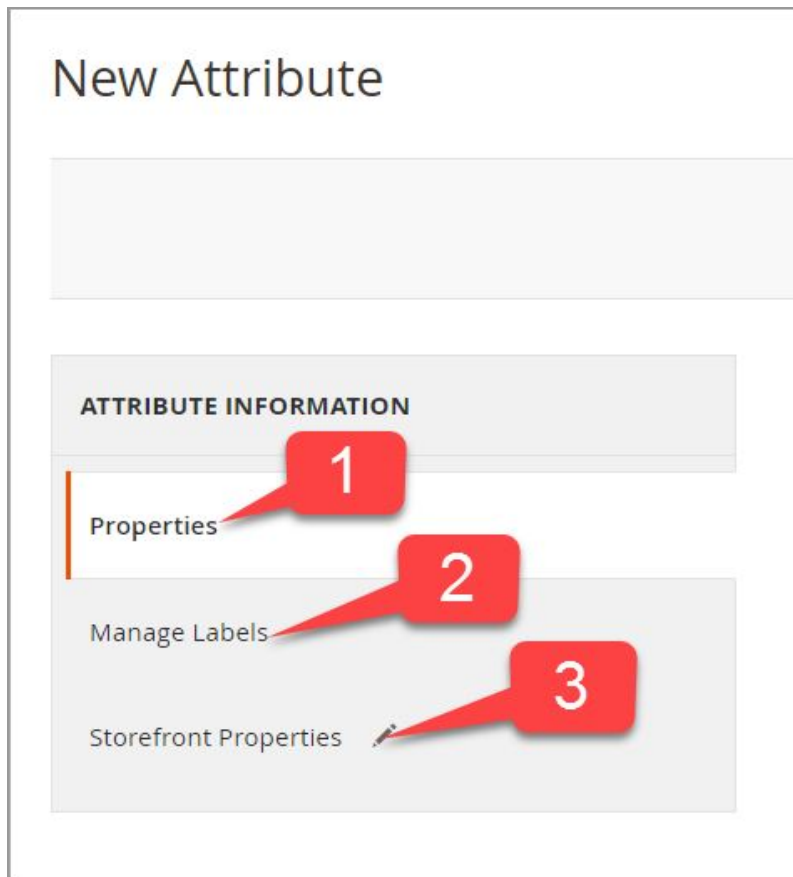
Add New Attribute

Filters
Default View
Columns

Actions ▾ 27 records found
50 per page
< 1 of 1 >

	Attribute ID	Attribute Code	Default Label	Input Type	Required	System	Visible in Customer Grid	Sort Order	Action
<input type="checkbox"/>	207	age	Age	Text	No	No	Yes	0	<a href="#">Edit</a>
<input type="checkbox"/>	166	avatar	Avatar	Image	No	No	Yes	0	<a href="#">Edit</a>
<input type="checkbox"/>	194	choose_what_magezon_extensions	Choose what Magezon extensions you like most	Select	No	No	Yes	0	<a href="#">Edit</a>

Take a closer look at the following 3 common sub-tabs as 3 main steps.



Below is the specific steps to create a customer attribute:

**Step 1 - Properties:** Fill in the fields of **Properties**.

**Step 2 - Manage Labels:** Enter the wanted attribute label (name) that you want to display per store view.

**Step 3 - Storefront Properties:** Enter the sort order of the customer attributes. Choose the positions (pages/forms) to display the attribute.

**Step 4 - Analytics:** Analyze the data shown in a pie chart. This section appears **ONLY WHEN** the input types are: **Yes/No**, **Multiple select**, **Select**, **Visual Swatch**, **Text Swatch**.

## Step 1 - Fill in Fields of Properties

- **Section 1:** Attribute Properties
- **Section 2:** Advanced Attribute Properties

### Attribute Properties

**Section 1**

Default Label \*

Input Type  ▼  
Text Editor input type requires WYSIWYG to be enabled in Stores > Configuration > Content Management.

Values Required  ▼

### Advanced Attribute Properties

**Section 2**

Attribute Code   
This is used internally. Make sure you don't use spaces or more than 60 symbols.

Default Value

Note   
This is the property to give hints to the field.

Input Validation  ▼

Visible in Customer Grid  ▼

## Section 1: Attribute Properties

### Attribute Properties

---

Default Label \*

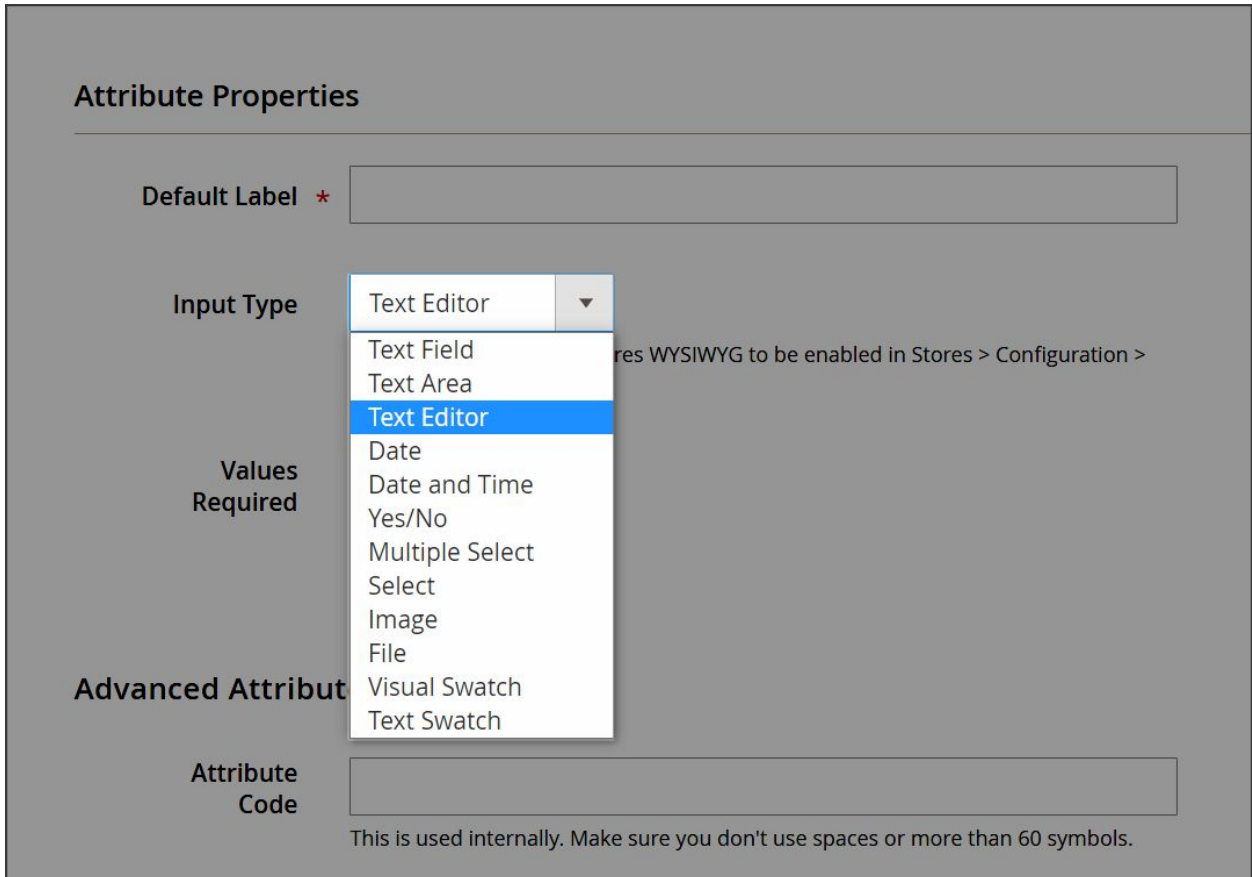
Values Required

Input Type

Text Editor input type requires WYSIWYG to be enabled in Stores > Configuration > Content Management.

- **Default Label:** Enter the name of the attribute in Admin and storefronts. This is a required field which is marked with a red asterisk. So, you must fill in this field.
  - **Value Required:** If you set **Yes** for **Value Required**, your customers must enter an answer to the field, and **No** for vice versa. If they leave it blank, a notification right below the field box will appear: “**This is a required field.**”.
- For required attribute fields, their names will be marked with a red asterisk.

- **Input Type:** Specify the attribute input type for data entry. This extension supports 12 input types that give you the flexibility to collect customers' data:

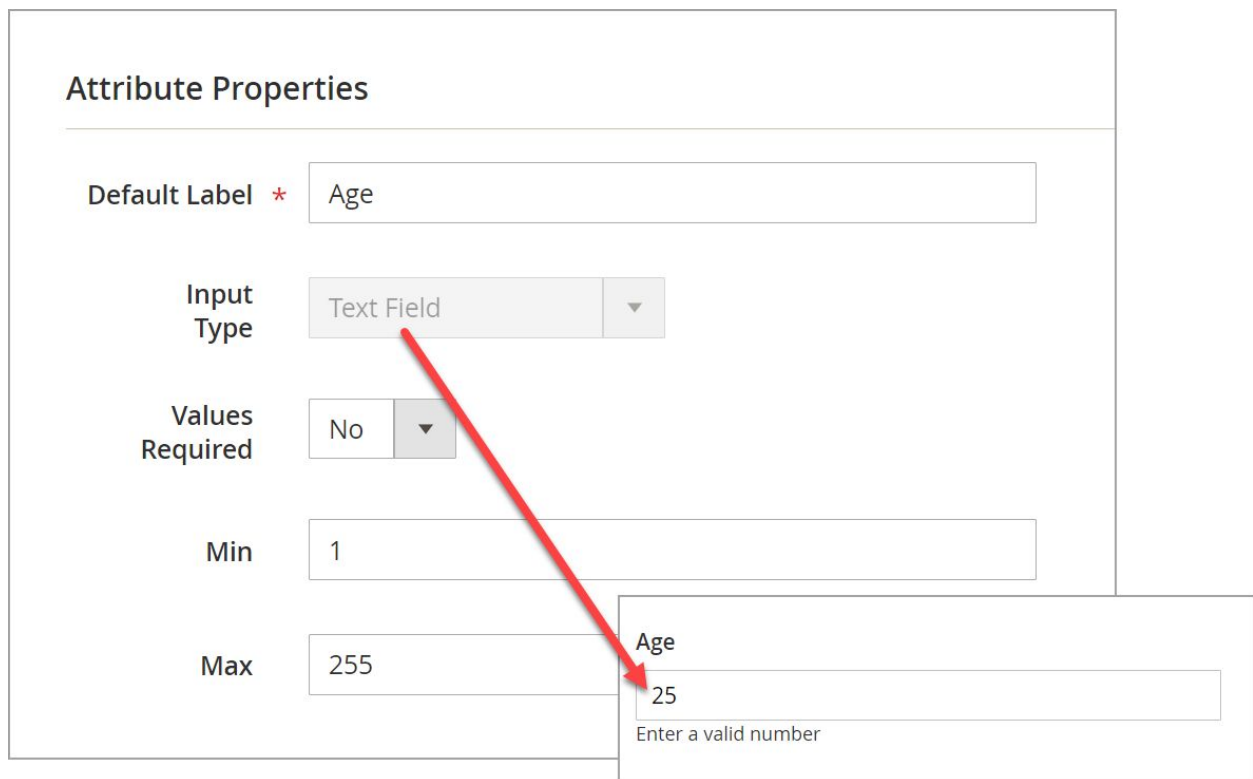


The screenshot shows the 'Attribute Properties' configuration form. It includes the following fields and options:

- Default Label \***: A text input field.
- Input Type**: A dropdown menu with the following options: Text Editor, Text Field, Text Area, Text Editor (highlighted), Date, Date and Time, Yes/No, Multiple Select, Select, Image, File, Visual Swatch, and Text Swatch.
- Values Required**: A checkbox.
- Advanced Attributes**: A section header.
- Attribute Code**: A text input field with a note below it: "This is used internally. Make sure you don't use spaces or more than 60 symbols."

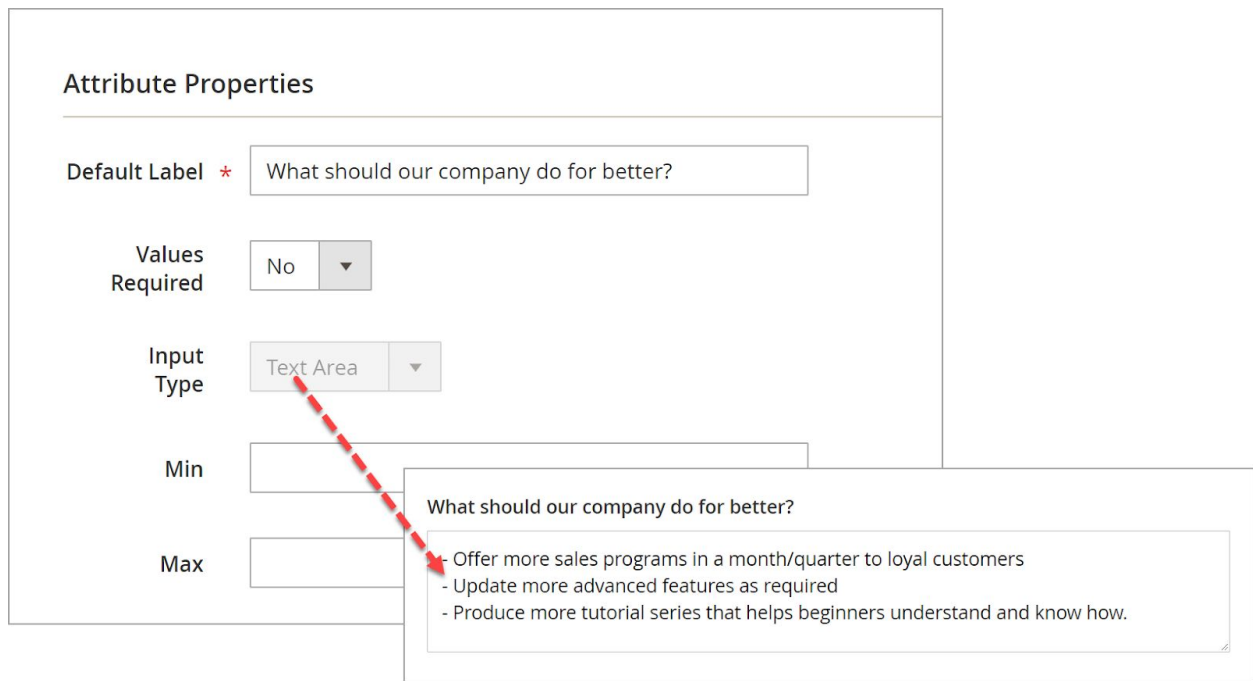


- **Text Field:** It's a single line field that lets users enter texts. Bear in mind that there is no space between characters.
  - + **Min:** The minimum number of letters you allow customers to enter in the box. The default value is 1.
  - + **Max:** The maximum number of letters you allow customers to enter in the box. The default value is 255.



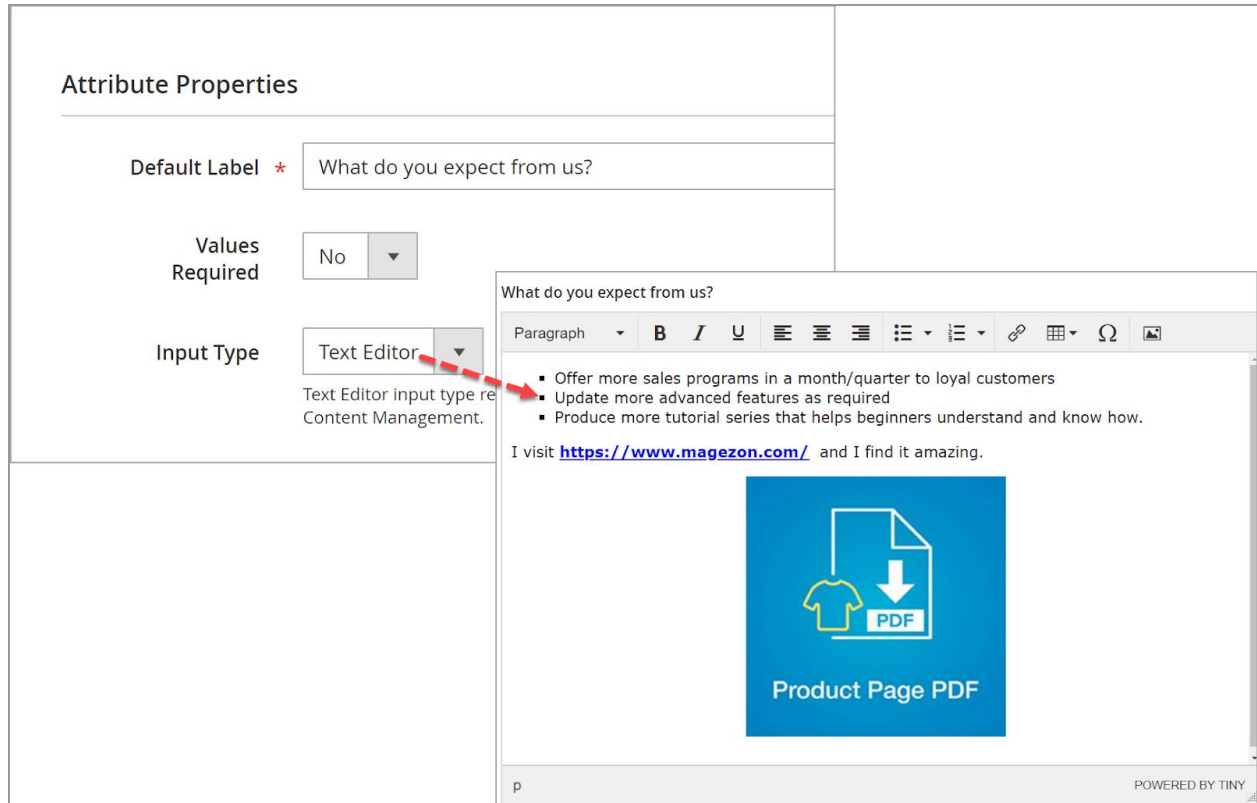
The screenshot shows the 'Attribute Properties' configuration page. The 'Default Label' is 'Age'. The 'Input Type' is 'Text Field'. The 'Values Required' is 'No'. The 'Min' value is '1' and the 'Max' value is '255'. A red arrow points from the 'Text Field' dropdown to a validation error message box that appears over the 'Max' field. The error message box contains the text 'Age', the value '25', and the instruction 'Enter a valid number'.

- **Textarea:** It's a multi-line field that allows users to enter texts, a short paragraph as usual. As mentioned above, you can set the number of rows for the field at from 3 to 12.
  - + **Min:** The minimum number of letters you allow customers to enter in the box.
  - + **Max:** The maximum number of letters you allow customers to enter in the box.



The screenshot shows the 'Attribute Properties' configuration interface. It includes a 'Default Label' field with the text 'What should our company do for better?'. Below this are three dropdown menus: 'Values Required' set to 'No', 'Input Type' set to 'Text Area', and 'Min' and 'Max' fields which are currently empty. A red dashed arrow points from the 'Text Area' dropdown to a preview window. The preview window displays the label 'What should our company do for better?' above a text area containing the following text: '- Offer more sales programs in a month/quarter to loyal customers', '- Update more advanced features as required', and '- Produce more tutorial series that helps beginners understand and know how.'

- **Text Editor:** It gives you the ability to add and edit texts with advanced tools such as adding headings, adding bold/italic/underline, inserting images/links/tables, etc.



The screenshot displays the 'Attribute Properties' configuration interface. On the left, the 'Default Label' is set to 'What do you expect from us?'. The 'Values Required' is set to 'No'. The 'Input Type' is set to 'Text Editor'. A red dashed arrow points from the 'Text Editor' dropdown to a preview window. The preview window shows the text 'What do you expect from us?' with a rich text editor toolbar. The content includes a bulleted list: 'Offer more sales programs in a month/quarter to loyal customers', 'Update more advanced features as required', and 'Produce more tutorial series that helps beginners understand and know how.' Below the list is a sentence: 'I visit <https://www.magezon.com/> and I find it amazing.' A blue button with a white icon of a document and a download arrow is labeled 'Product Page PDF'. The bottom right corner of the preview window says 'POWERED BY TINY'.

- **Date:** Users can select a date with a special date picker. Also, users can directly enter the time and date in the box.
  - + **Min. Date - Max. Date:** The time period during which your customers can choose the date. Beyond this period, they can't pick the date.
 

**For example:** We set 12/15/20 as **Min. Date** and 12/22/20 as **Max. Date**. Therefore, on the front-end, customers can only choose the date during this period.
  - + You can set the default date at **Default Value** (at the below section **Advanced Attribute Properties**). This case, the default value is 12/20/2020 (Light orange color).  
In case, you don't set the default value for **Date**, this value will be the current date customers fill in the registration form.

### Attribute Properties

Default Label \*

Values Required

Input Type

Min. Date

Max. Date

Date of buying \*

SU	MO	TU	WE	TH	FR	SA
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Done

You can ONLY pick the date during the period

- **Date and Time:** Users enable customers to select both time and date from a special date picker.
    - + **Min. Date - Max. Date:** The time period during which your customers can choose the date. Beyond this period, they can't pick the date.
    - + You can set the default date at **Default Value** (at the below section **Advanced Attribute Properties**). This example, the default value is 12/20/2020.
- In case, you don't set the default value for **Date and Time**, this value will be the current date customers fill in registration form.


### Attribute Properties


---

Default Label \*

Input Type  ▼

Values Required  ▼

Min. Date  

Max. Date  

**Time and Date**

◀ December 2020 ▶

SU	MO	TU	WE	TH	FR	SA
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Time

Hour

Minute

No
  Yes

Default value

- **Yes/No:** The field with this input type accepts only one option, yes or no.  
The input type has 2 display options: **Option** and **Toggle**.

### Attribute Properties

Default Label \*

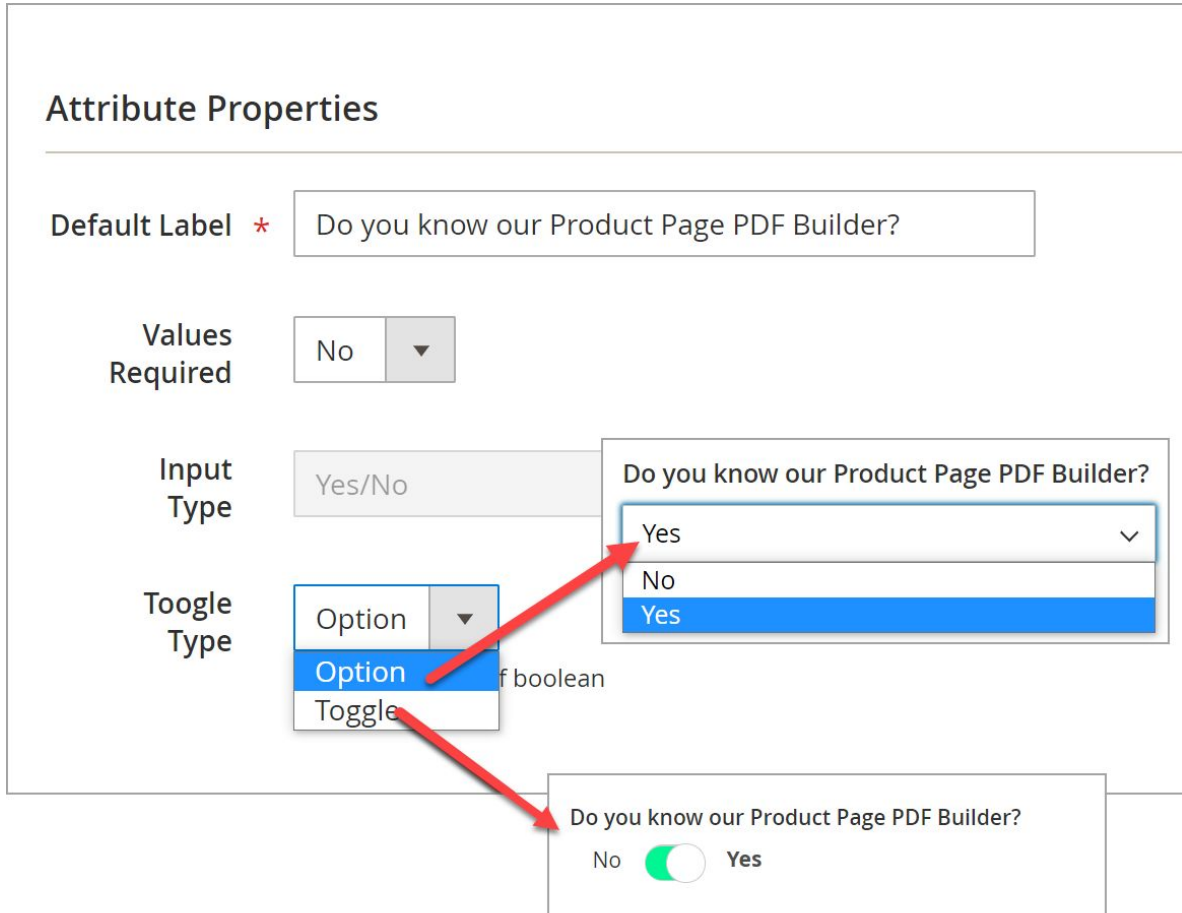
Values Required

Input Type

Toggle Type  of boolean

Do you know our Product Page PDF Builder?

Do you know our Product Page PDF Builder?  
No  Yes



Next, we will show you 4 following select-input types:

- **Multiple Select**
- **Select**
- **Text Swatch**
- **Visual Swatch**

The attributes with these input types share one section - **Manage Options**.

- To add options, choose **Add Option**
- To remove options, choose **Delete**
- Enter the attribute label/name in their desired store views if necessary.

Now, let's take a closer look at each input type.

- **Multiple Select:** An attribute input type that allows users' customers to select multiple options from a drop-down list. Plus, this input type has 2 display types: **Checkbox** and **Option**.

### Attribute Properties

---

Default Label \*

Values Required

Input Type

Multiple Type 

- Option
- Option
- Checkbox

multiple-select

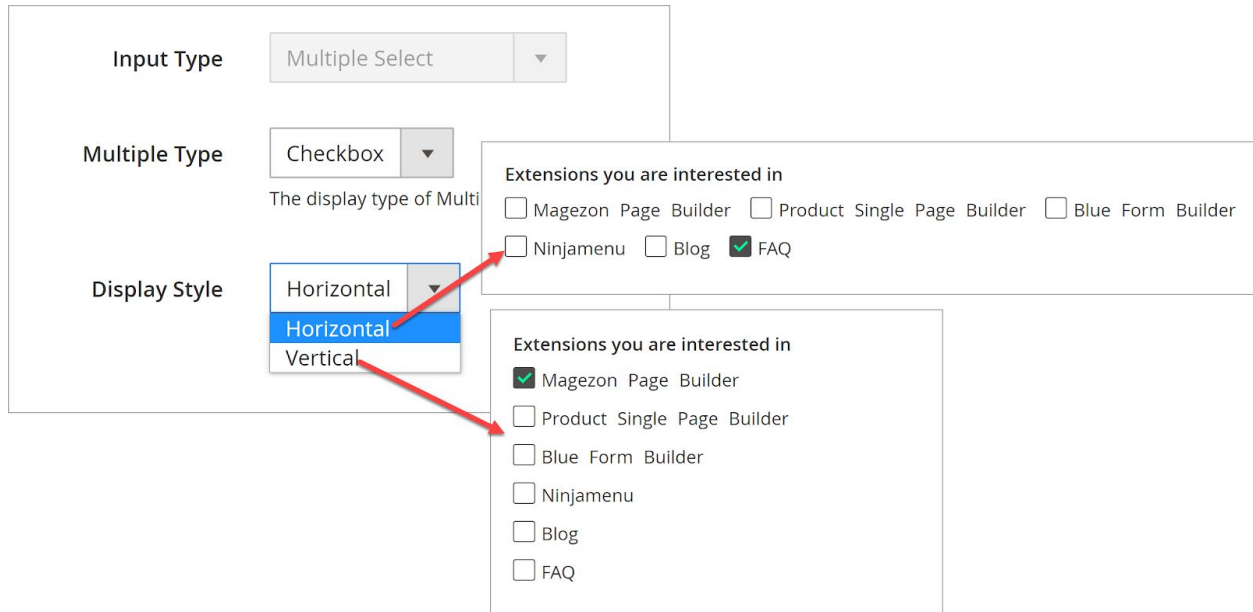
### Manage Options (Values of Your Attribute)

---

	Is Default	Admin *	Default Store View	Vietnam	France	India	
☰	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Magezon Page"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
☰	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Product Single"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
☰	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Blue Form Bu"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>



Here is **Checkbox**, along with 2 display styles: **Horizontal** & **Vertical**.



Input Type: Multiple Select

Multiple Type: Checkbox  
The display type of Multi

Display Style: Horizontal / Vertical

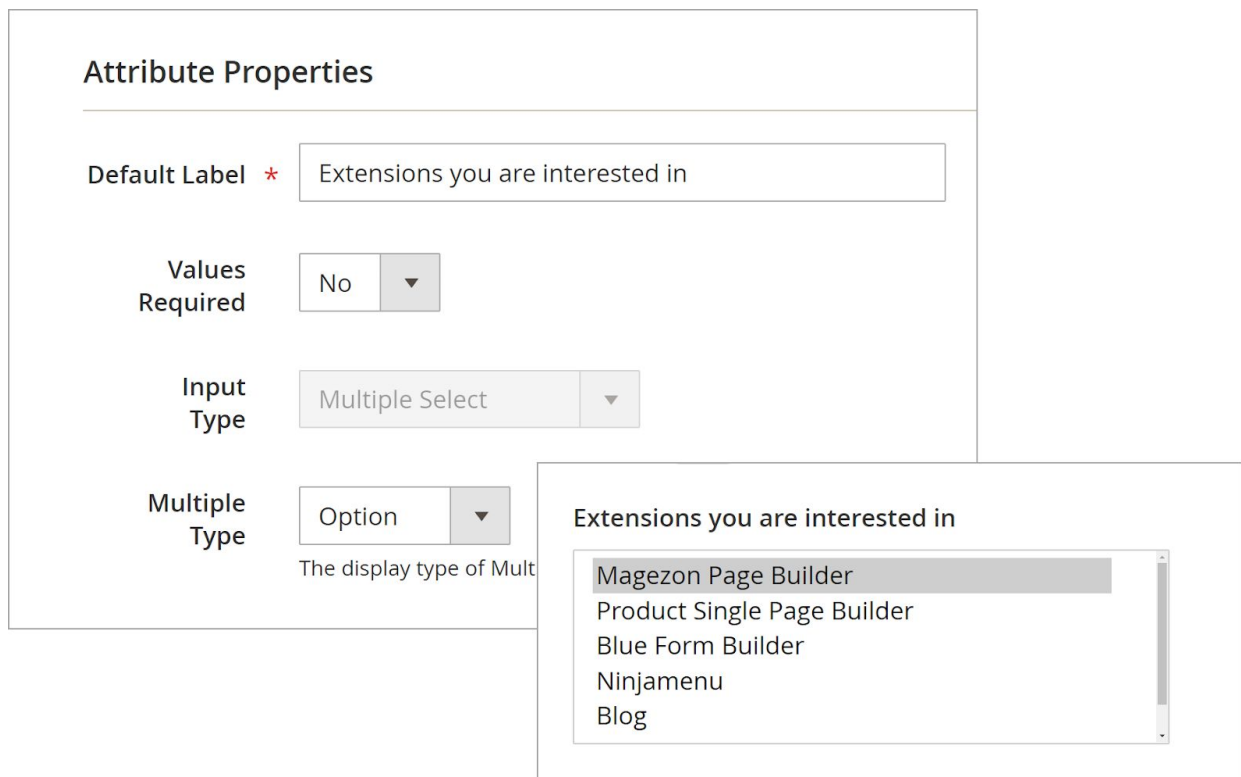
Extensions you are interested in (Horizontal):

- Magezon Page Builder
- Product Single Page Builder
- Blue Form Builder
- Ninjamenu
- Blog
- FAQ

Extensions you are interested in (Vertical):

- Magezon Page Builder
- Product Single Page Builder
- Blue Form Builder
- Ninjamenu
- Blog
- FAQ

Here is **Option**:



Attribute Properties

Default Label \* Extensions you are interested in

Values Required: No

Input Type: Multiple Select

Multiple Type: Option  
The display type of Multi

Extensions you are interested in:

- Magezon Page Builder
- Product Single Page Builder
- Blue Form Builder
- Ninjamenu
- Blog

- **Select:** Users create fields with this input type that lets customers choose one single option from a selection list.

### Attribute Properties

---

Default Label \*

Input Type  ▼

Values Required  ▼

Select Type  ▼

---

### Manage Options (Values of Your Attribute)

Is Default	Admin *	Default Store View	Vietnam	France	India		
<input type="checkbox"/>	<input type="checkbox"/>	Product Page	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
<input type="checkbox"/>	<input type="checkbox"/>	Size Chart	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

The input type **Select** has 2 display types: **Option & Radio**.

For Radio, there are 2 styles to display options: **Vertical & Horizontal**.

Scroll down to see how they look.

Here is the **Option**:

Choose what Magezon extensions you like most

- Product Page PDF Builder
- Product Page PDF Builder
- Size Chart
- Image Gallery

Here is the **Radio** with 2 display options:

Choose what Magezon extensions you like most

Product Page PDF Builder **Vertical**

Size Chart

Image Gallery

Choose what Magezon extensions you like most **Horizontal**

Product Page PDF Builder  Size Chart  Image Gallery

- **Text Swatch:** Enables users to use the text that represents the options and customers can choose only one option.

### Attribute Properties

Default Label \*

Input Type Text Swatch ▼

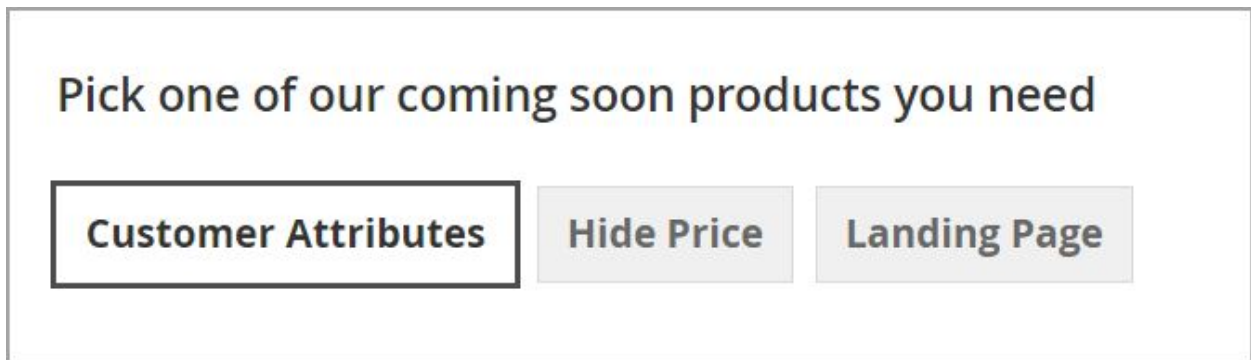
Values Required No ▼

---

### Manage Swatch (Values of Your Attribute)

Is Default	Admin	Default Store View				Vietnam	France		India		
<input checked="" type="radio"/>	Custom	Custom	Custom	Custom	Custom	Descripti	Custom	Descripti	Custom	Descripti	🗑️
<input type="radio"/>	Hide Pr	Hide Pric	Hide Pr	Hide Pric	Hide Pr	Descripti	Hide Pr	Descripti	Hide Pr	Descripti	🗑️
<input type="radio"/>	Landing	Landing l	Landing	Landing l	Landing	Descripti	Landing	Descripti	Landing	Descripti	🗑️

Here is the result:



- **Visual Swatch:** Users use this attribute input type that enables customers to tick only one option with image/color

### Attribute Properties

---







Default Label \*

Input Type

Values Required


### Manage Swatch (Values of Your Attribute)


---


Is Default	Swatch	Admin	Default Store View	Vietnam	France	India	
<input type="radio"/>		Magezon Page	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="radio"/>		Ninja Menu	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input checked="" type="radio"/>		Blue Form Buil	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Here is the front-end:

What products did you buy from Magezon?







- **Image:** Customers are allowed to upload the image from their devices. You can set the maximum file upload size (Unit: byte).

### Attribute Properties


Default Label \*


Input Type

Values Required

File Max Size   
The max size of file upload

Your photo

 Image Upload

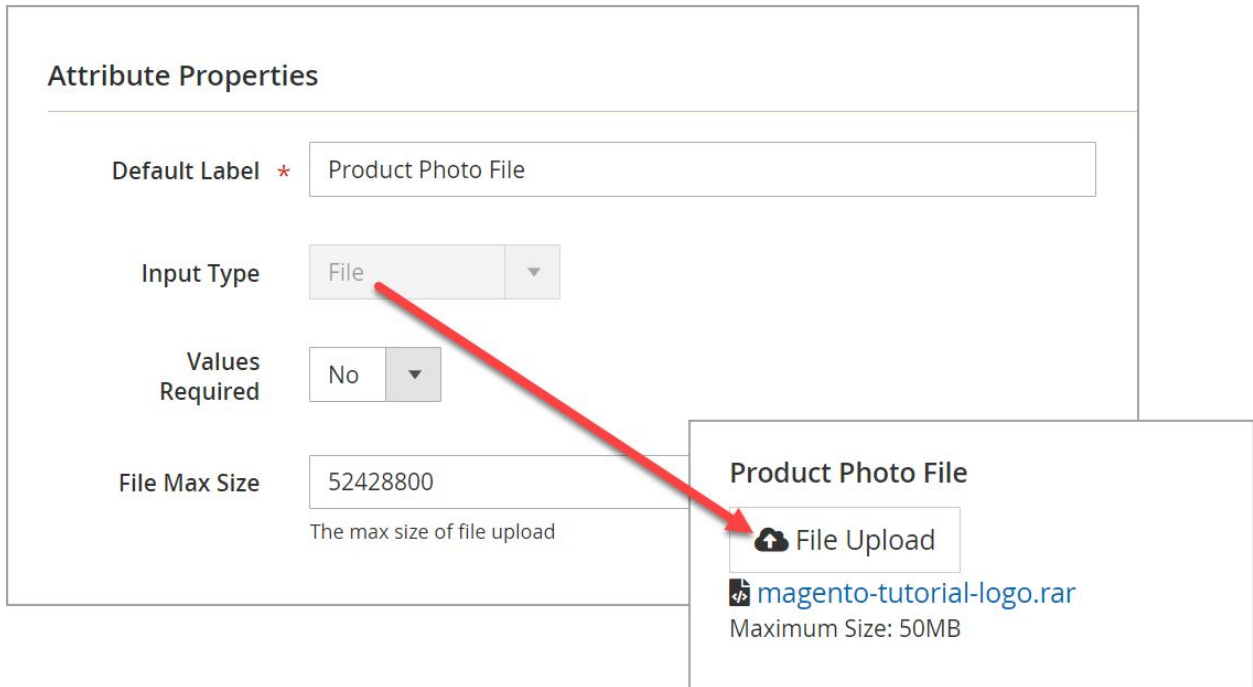


Magezon Page Builder

BUILD ANY LAYOUT TODAY

- **File:** Your customers are allowed to upload the file from their devices.

**NOTE:** You can set the maximum file size when your customers upload the file (Unit: Byte). Make sure that you increased the limit on your web server before changing the maximum file size in the extension settings.



The screenshot displays the 'Attribute Properties' configuration interface. It includes the following fields:

- Default Label \***: Product Photo File
- Input Type**: File (selected from a dropdown menu)
- Values Required**: No (selected from a dropdown menu)
- File Max Size**: 52428800 (with a note: 'The max size of file upload')

A red arrow points from the 'File' input type dropdown to a preview window titled 'Product Photo File'. The preview shows a 'File Upload' button and a file named 'magento-tutorial-logo.rar' with a 'Maximum Size: 50MB'.

**Section 2:** Advanced Attribute Properties

### Advanced Attribute Properties

**Attribute Code**   
This is used internally. Make sure you don't use spaces or more than 60 symbols.

**Default Value**

**Note**   
This is the property to give hints to the field.

**Input Validation**  ▼

**Visible in Customer Grid**  ▼



- **Attribute Code:** Enter the attribute code to . Make sure you do not use spaces or more than 60 symbols that are letters (a-z), numbers (0-9) or underscore(\_) in this field. The first character should be a letter.

If you leave **Attribute Code** field blank, its value is based on the **Default Label** field (Of the section **Attribute Properties**).

### Attribute Properties

Default Label *	<input type="text" value="Phone Number"/>
Values Required	<input type="text" value="No"/>
Input Type	<input type="text" value="Text Field"/>
Min	<input type="text"/>
Max	<input type="text"/>

**Attribute Code is based on Default Label**

### Advanced Attribute Properties

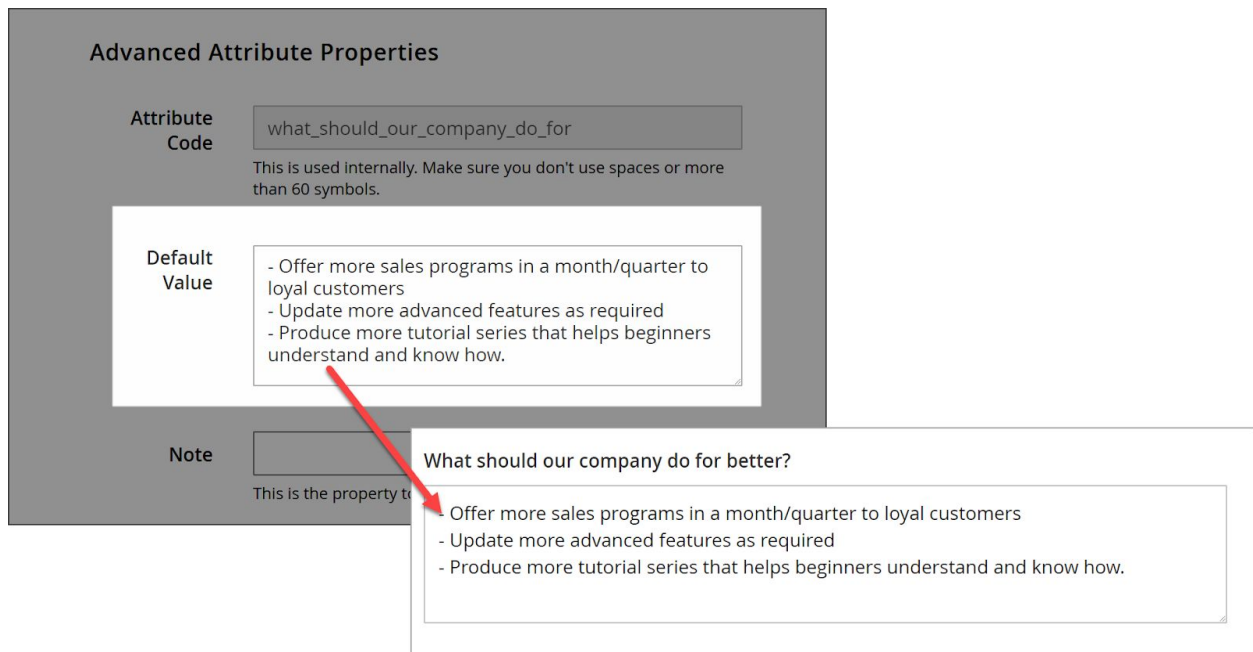
Attribute Code	<input type="text" value="phone_number"/>
----------------	---

This is used internally. Make sure you don't use spaces or more than 60 symbols.

- **Default Value:** Allows users to prefill the attribute fields with the data entered previously. So, customers don't have to fill in the field. A good way to save their time and minimize their errors.

**NOTE:** **Default Value** is applied for the attribute fields with the following input types:

- **Text Field**
- **Textarea**
- **Text Editor**
- **Date**
- **Date and Time**



**Advanced Attribute Properties**

**Attribute Code**   
This is used internally. Make sure you don't use spaces or more than 60 symbols.

**Default Value**  
- Offer more sales programs in a month/quarter to loyal customers  
- Update more advanced features as required  
- Produce more tutorial series that helps beginners understand and know how.

**Note**   
This is the property to

- Offer more sales programs in a month/quarter to loyal customers  
- Update more advanced features as required  
- Produce more tutorial series that helps beginners understand and know how.

- **Note:** This field allows users to give customers specific instructions to the field. Hence, customers know exactly what they should fill out in a blink.

Your position in the company? \*

- **Input Validation:** By notifications, Input Validation helps prevent users or customers from filling in the field with the wrong format. So, users can gather the correct customer data before running analysis. There are 6 rules of input validation:

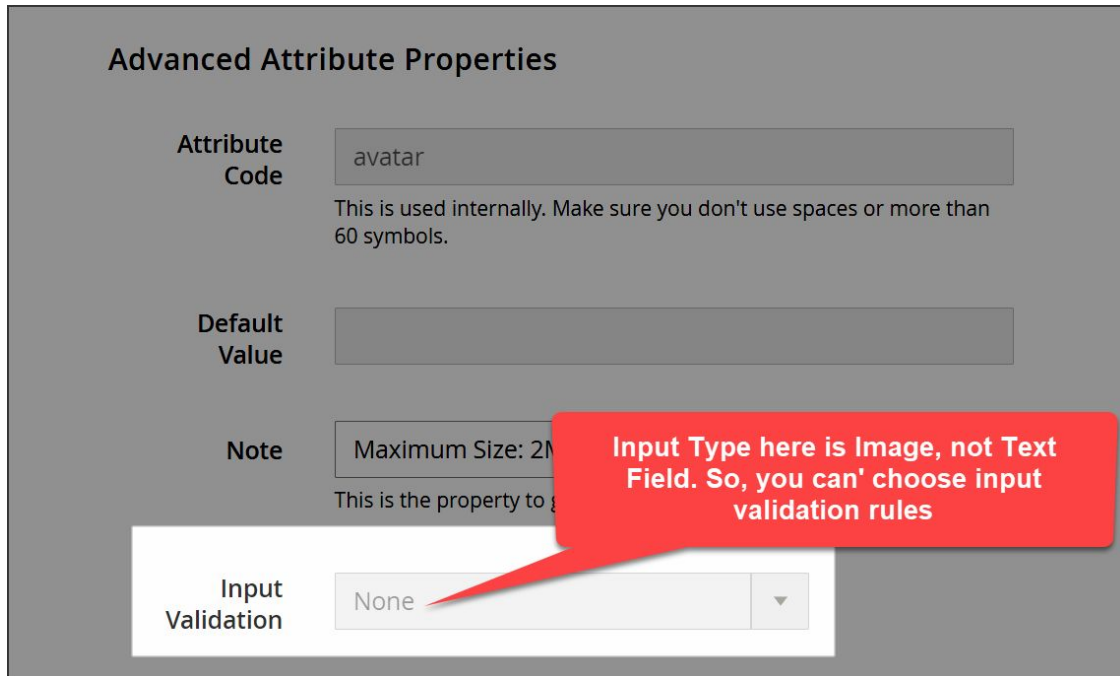
**Note**

This is the property to give hints to the field!

**Input Validation**

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

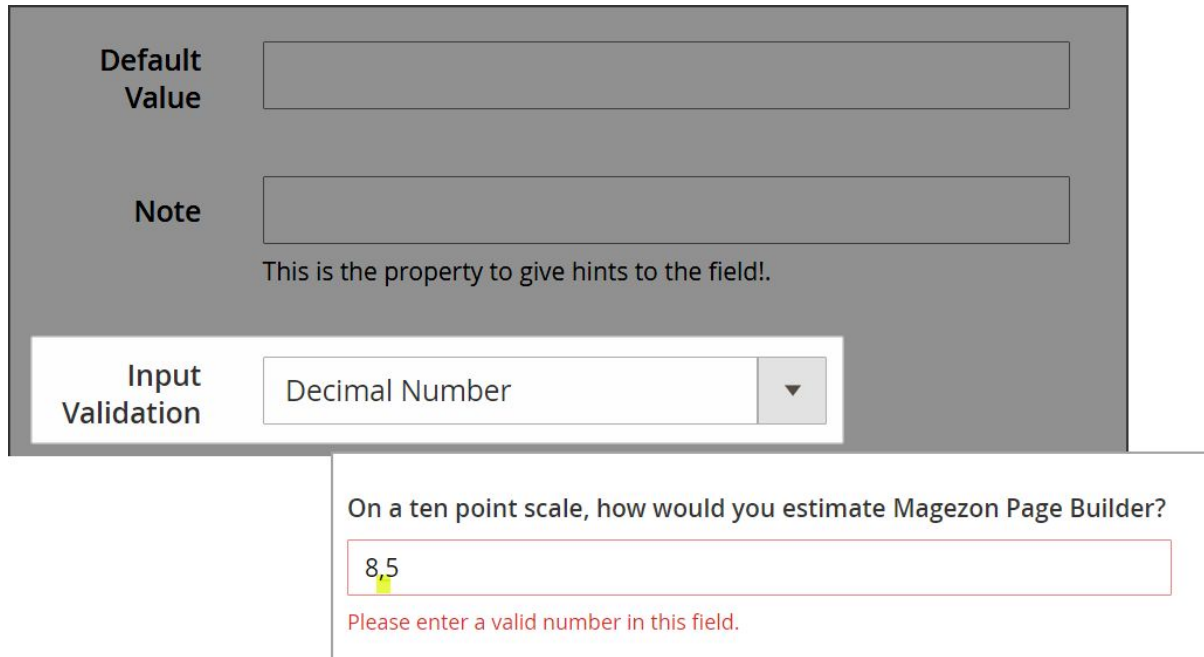
**NOTE:** Input validation will be applied to the field **ONLY WHEN** its input type is **Text Field**. For other attribute input types, the box of input validation can't be entered into.



The screenshot shows the 'Advanced Attribute Properties' configuration page. It includes fields for 'Attribute Code' (containing 'avatar'), 'Default Value', and 'Note' (containing 'Maximum Size: 2M'). Below these is the 'Input Validation' dropdown menu, which is currently set to 'None'. A red callout box with white text points to the dropdown, stating: 'Input Type here is Image, not Text Field. So, you can't choose input validation rules'.

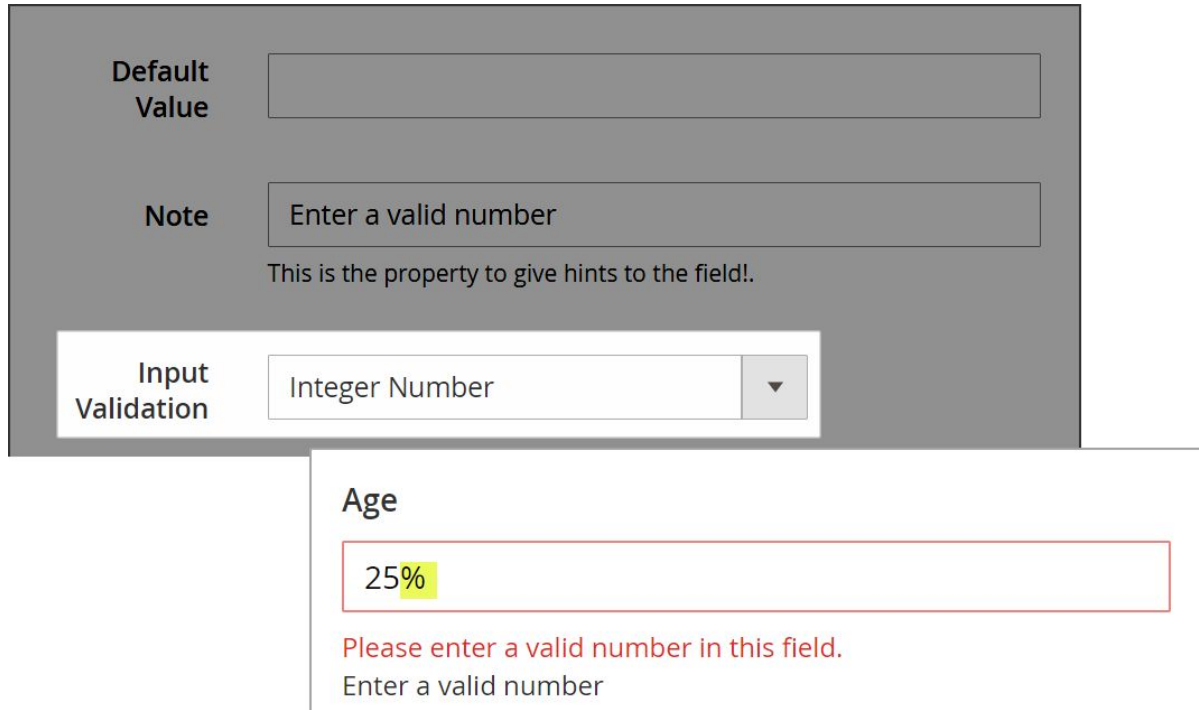
Highlighted areas below are the errors that can't be accepted by input validation rules.

- **Decimal Number:** The attribute field only accepts the input entered with decimal number only. Remember, the decimal separator here is a dot (.).



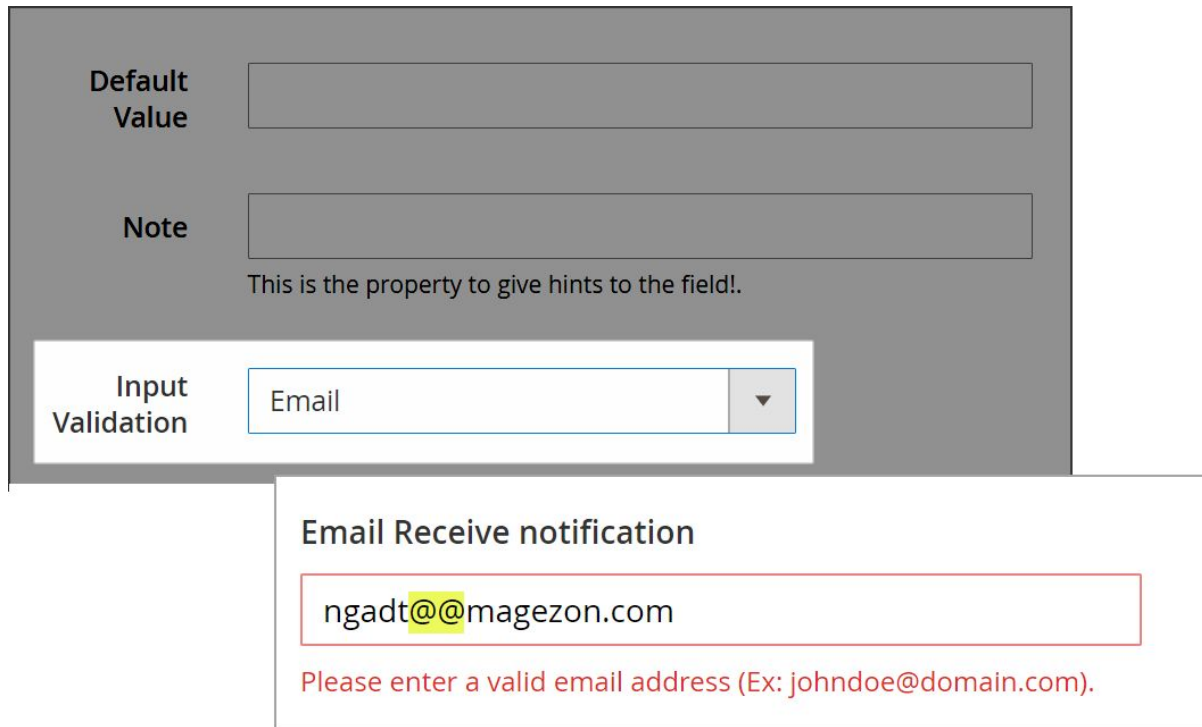
The screenshot shows a configuration panel for a customer attribute. It includes fields for 'Default Value', 'Note', and 'Input Validation'. The 'Input Validation' dropdown is set to 'Decimal Number'. Below this, a preview of the attribute field is shown with the question 'On a ten point scale, how would you estimate Magezon Page Builder?'. The input field contains '8,5', which is highlighted in red, and a red error message below it reads 'Please enter a valid number in this field.'.

- **Integer Number:** The input field only accepts the input entered with integer number only. When customers' answer doesn't match the format, a notification will be shown: "Please enter a valid number in this field.."



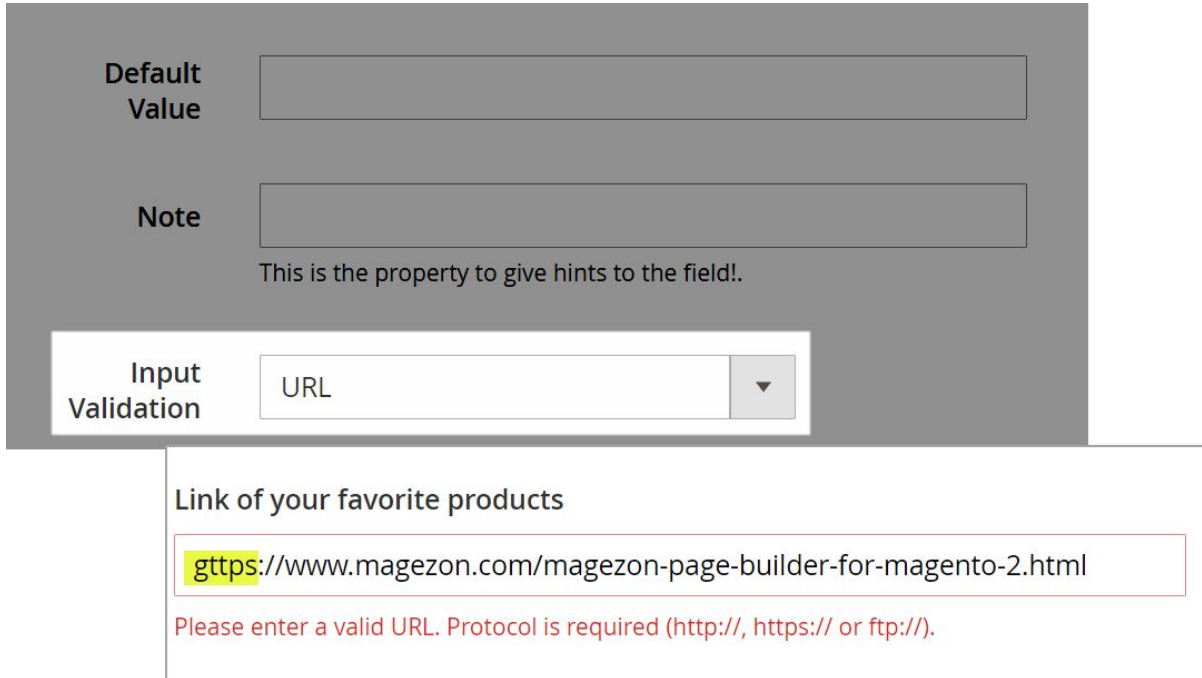
The screenshot displays the configuration interface for an input field. It includes a 'Default Value' field, a 'Note' field with the text 'Enter a valid number' and a sub-note 'This is the property to give hints to the field!'. The 'Input Validation' dropdown is set to 'Integer Number'. Below this, a preview shows the 'Age' field with the input '25%' highlighted in yellow. A red border surrounds the input field, and a red error message is displayed below it: 'Please enter a valid number in this field.' followed by the hint 'Enter a valid number'.

- **Email:** The input field is validated only when the input has a proper format of an email address. If your customers fill in the field wrongly, a notification with hints will appear right below: *Please enter a valid email address (Ex: johndoe@domain.com).*



The screenshot shows a configuration panel for a customer attribute. It includes a 'Default Value' field, a 'Note' field with the text 'This is the property to give hints to the field!', and an 'Input Validation' dropdown menu set to 'Email'. Below the configuration panel, a notification box titled 'Email Receive notification' displays the email address 'ngadt@@magezon.com' with a red border and a red error message: 'Please enter a valid email address (Ex: johndoe@domain.com)'. The '@' symbol in the email address is highlighted in yellow.

- **URL:** The input field is validated only if the input has a right format of an email URL, particularly “Please enter a valid URL. Protocol is required (http://, https:// or ftp://)”.



The screenshot shows a configuration interface for a form field. It includes a 'Default Value' field, a 'Note' field with the text 'This is the property to give hints to the field!', and an 'Input Validation' dropdown menu set to 'URL'. Below this, a preview box shows the field with the URL 'gttps://www.magezon.com/magezon-page-builder-for-magento-2.html' and the validation error message 'Please enter a valid URL. Protocol is required (http://, https:// or ftp://)'.

Default Value

Note   
This is the property to give hints to the field!

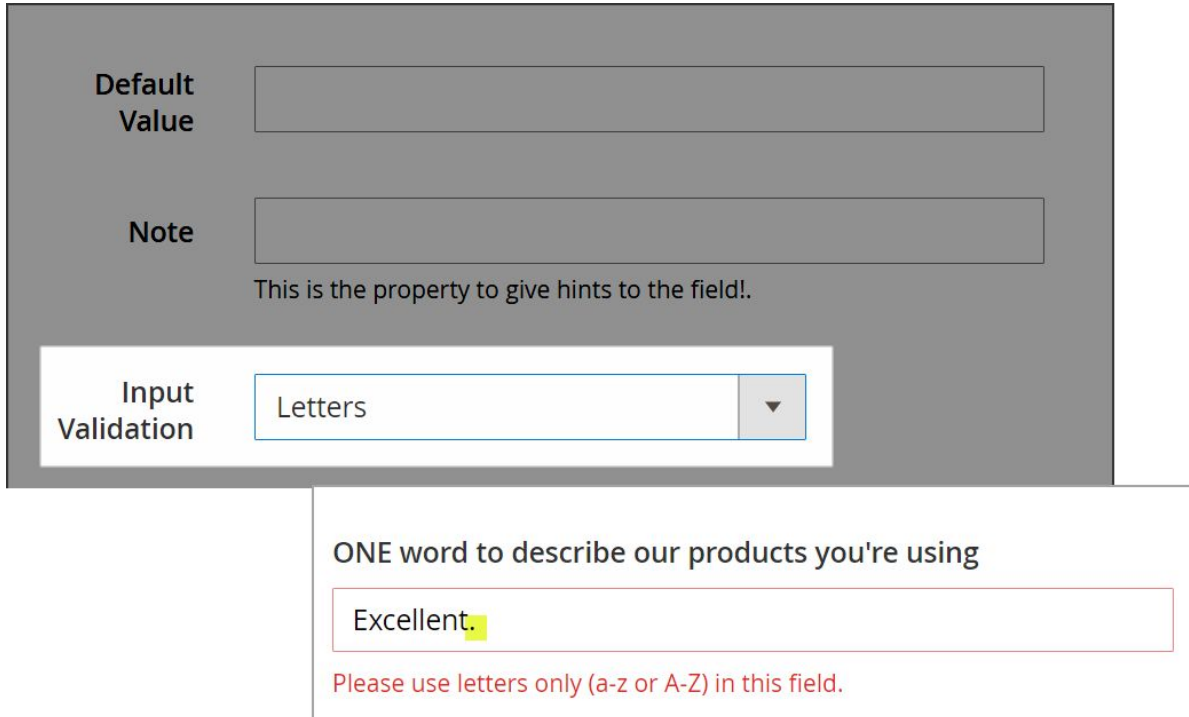
Input Validation

Link of your favorite products

Please enter a valid URL. Protocol is required (http://, https:// or ftp://).



- **Letters:** The attribute field accepts letters only (a-z, A-Z). Numbers, punctuation marks, spaces and special characters are not allowed in the field.



The screenshot displays the configuration interface for an attribute. It includes fields for 'Default Value' and 'Note'. The 'Input Validation' dropdown is set to 'Letters'. A preview box shows the attribute label 'ONE word to describe our products you're using' and a text input field containing 'Excellent.' with a red error message: 'Please use letters only (a-z or A-Z) in this field.'

Default Value

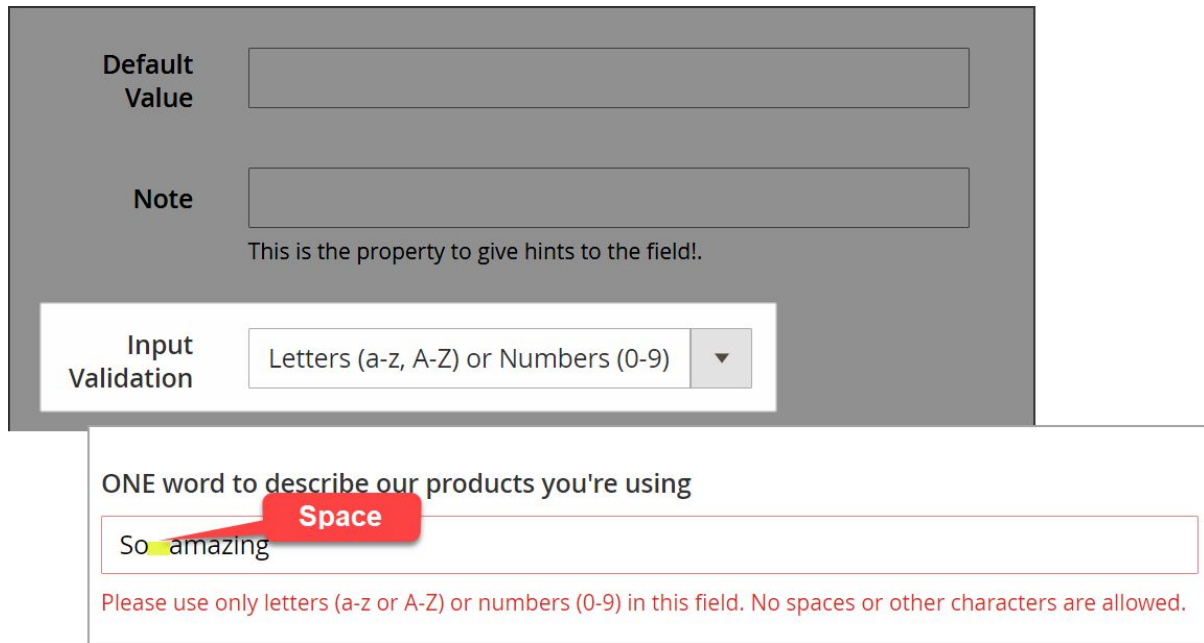
Note   
This is the property to give hints to the field!

Input Validation

ONE word to describe our products you're using

Please use letters only (a-z or A-Z) in this field.

- **Letters (a-z, A-Z) or Numbers (0-9):** The attribute field accepts letters (a-z, A-Z) and numbers (0-9) only. Punctuation marks, spaces, special characters are not allowed in the field.



The screenshot shows a configuration panel for an attribute field. It includes a 'Default Value' field, a 'Note' field with the text 'This is the property to give hints to the field!', and an 'Input Validation' dropdown menu set to 'Letters (a-z, A-Z) or Numbers (0-9)'. Below this, a text input field contains the text 'So amazing'. A red callout bubble points to the space between 'So' and 'amazing', labeled 'Space'. A red error message below the field reads: 'Please use only letters (a-z or A-Z) or numbers (0-9) in this field. No spaces or other characters are allowed.'

- **None (Default):** Accepts input entered with all types above.

- **Visible in Customer Grid:** Choose **Yes/No** to enable/disable the attribute in customer grid. Take the attribute field “**Age**” as an example. This case, we choose **Yes** to enable this attribute in the customer grid.

**Advanced Attribute Properties**

**Attribute Code**   
This is used internally. Make sure you don't use spaces or more than 60 symbols.

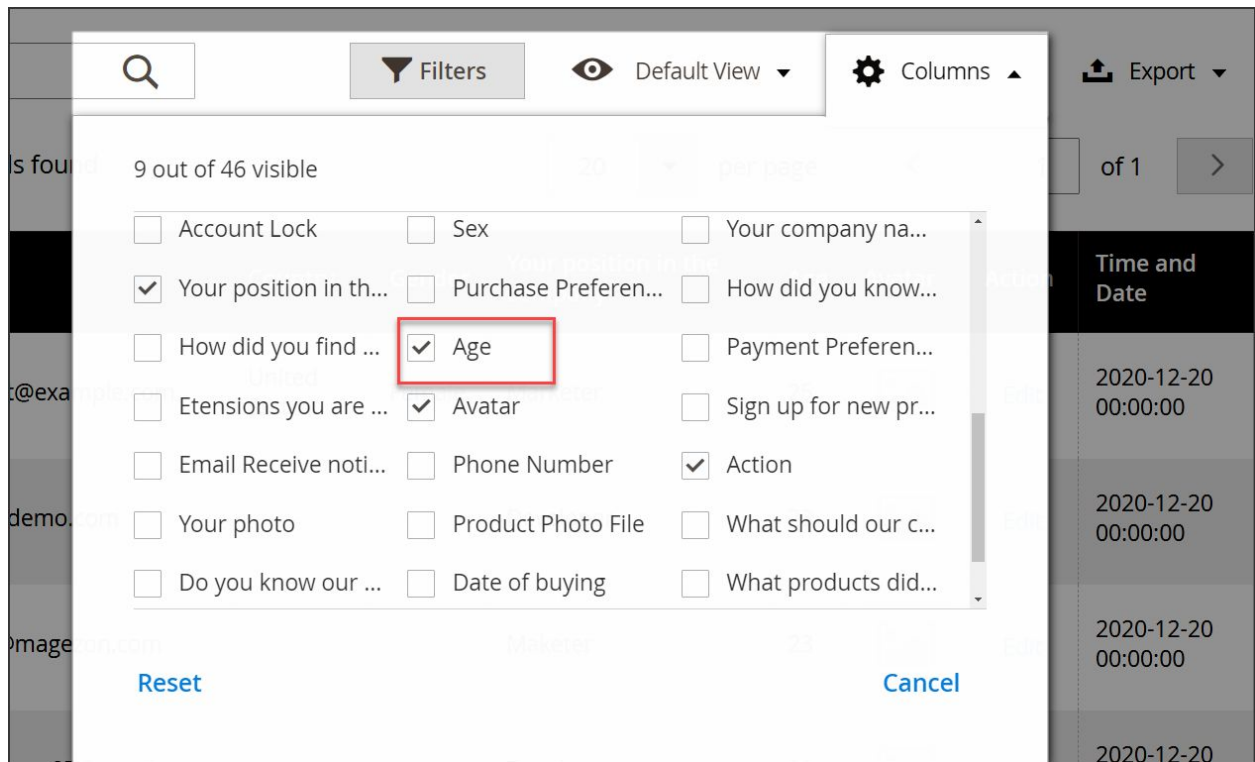
**Default Value**

**Note**   
This is the property to give hints to the field.

**Input Validation**  ▼



**Visible in Customer Grid**  ▼

Moreover, you also need to tick this attribute's box at **Columns** for its visibility.




And now, you can see this attribute in the customer grid:


Customers



 admin


Add New Customer

Search by keyword 




Filters

 Default View

 Columns

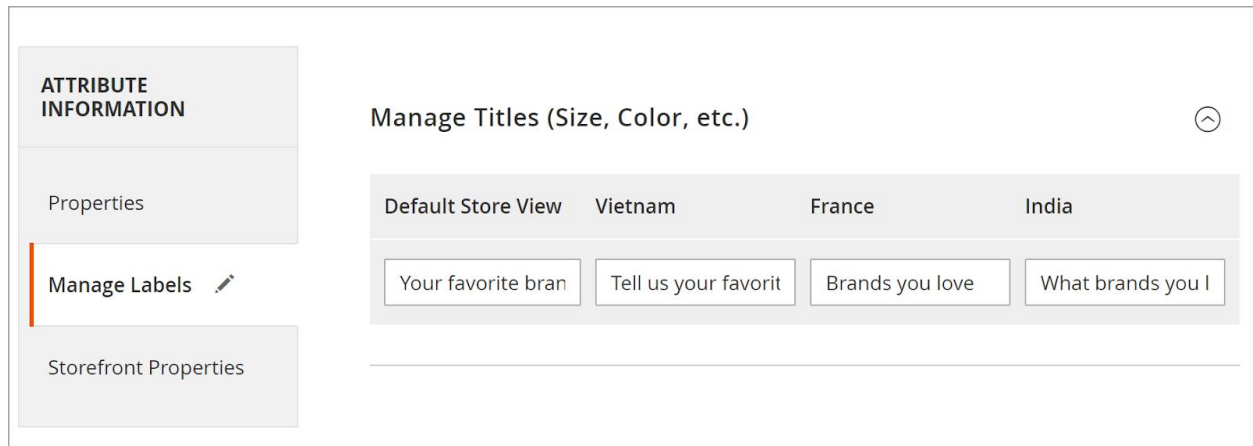
 Export

Actions 8 records found
20 per page
< 1 of 1 >

	Name	Email	Country	Gender	Your position in the company?	Age	Avatar	Action	Time and Date
<input type="checkbox"/>	Jane Dong	roni_cost@example.com	United States	Female	Marketer	25		<a href="#">Edit</a>	2020-12-20 00:00:00
<input type="checkbox"/>	Lioz Nguyen	hoand@demo.com			Developer	23		<a href="#">Edit</a>	2020-12-20 00:00:00
<input type="checkbox"/>	Heidi Hoang	honght@magezon.com			Maker	23		<a href="#">Edit</a>	2020-12-20 00:00:00

## Step 2 - Manage Labels

This extension supports multiple store views. That means you can customize the label of the attribute field for each store view.



Default Store View	Vietnam	France	India
Your favorite bran	Tell us your favorit	Brands you love	What brands you I

- Enter the desired label/name of the attribute for each store view. The label will replace the created attribute name when entering the data. If you leave it blank, the attribute label/name for every store view is the name in **Default Store View**.

### Step 3 - Storefront Properties

#### Storefront Properties

**Sort Order**   
The order to display attribute on the frontend

**Display on Frontend Pages**

- Customer Registration
- Customer Account Dashboard
- Edit Account Information

**Display on Backend Pages**

- Admin Order Details
- New Invoice
- View Invoice
- New Shipment
- View Shipment
- New Memo
- View Memo

- **Sort Order:** Enter the sort order of the customer attribute.
- Enter the order number you want to sort the attributes on the front end (and the back-end). The smaller the order number is, the higher its priority is.

- 
- If you don't fill out this field, the order number is 0 by default. In case several fields have the same order number at 0, creation time decides the sort order. The more newly-created an attribute is, the higher its priority is.
  - Choose the position (pages/forms) to display the attribute. Customer attributes are displayed on the following page:
    - **Display on frontend pages:**
      - + **Customer Registration**
      - + **Customer Account Dashboard**
      - + **Edit Account Information**
    - **Display on backend pages:**
      - + **Admin Order Details**
      - + **New Invoice**
      - + **View Invoice**
      - + **New Shipment**
      - + **View Shipment**
      - + **New Memo**
      - + **View Memo**

To choose multiple pages, hold down the **Ctrl key** in your keyboard.



We continue choosing the attribute field “Age” as an example. Please scroll down to view this field on each page of the frontend and backend.

### Customer Registration

## 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: Strong

**Confirm Password \***

\* Required Fields

Additional Information

**Age**

Enter a valid number

## Customer Account Dashboard

# My Account

### Account Information

#### Contact Information

Lee Hoang  
roni\_cost@example.com  
[Edit](#) | [Change Password](#)

#### Newsletters

You aren't subscribed to our newsletter.  
[Edit](#)

#### Additional Information



**Age:** 25

**Choose what Magezon extensions you like most :** Product Page PDF Builder

**Date of buying:** Nov 30, 1969 04:00:00 PM

**Etensions you are interested in:** Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ

**Payment Preferences:** Debit Card

**Edit Account Information**

# Edit Account Information

## Account Information

First Name \*

Last Name \*

Change Email

Change Password

Allow remote shopping assistance 

If you created this account using Amazon Pay, you might not know your site password.

In order to reset your password, please [Sign Out](#) and click on "Forgot Your Password?" from the Sign In page

## Additional Information

Age

Enter a valid number

## Admin Order Details

← Back
Login as Customer
Cancel
Send Email
Hold
Invoice
Ship
Reorder
Edit

**ORDER VIEW**

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History

### Order & Account Information

**Order # 000000013 (The order confirmation email was sent)**

Order Date	Jan 4, 2021, 10:46:47 PM
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	162.158.179.56 (14.248.94.118, 162.158.179.56)

**Account Information** [Edit Customer](#)

Customer Name	Lee Hoang
Email	roni_cost@example.com
Customer Group	Retailer
Age	25
Date of buying	1969-12-01 00:00:00
Extensions you are interested in	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ

## New Invoice

### New Invoice

admin

← Back    Reset

#### Order & Account Information

#### Order # 00000013 (The order confirmation email was sent)

Order Date	Jan 4, 2021, 10:46:47 PM
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	162.158.179.56 (14.248.94.118, 162.158.179.56)

#### Account Information [Edit Customer](#)

Customer Name	Lee Hoang
Email	roni_cost@example.com
Customer Group	Retailer
Age	25
Date of buying	1969-12-01 00:00:00
Extensions you are interested in	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ

**View Invoice**

[← Back](#)    [Login as Customer](#)    [Send Email](#)    [Print](#)

---

### Order & Account Information

**Order # 00000013** (The order confirmation email was sent)



Order Date	Jan 4, 2021, 10:46:47 PM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	162.158.179.56 (14.248.94.118, 162.158.179.56)

### Account Information [Edit Customer](#)

Customer Name	Lee Hoang
Email	<a href="mailto:roni_cost@example.com">roni_cost@example.com</a>
Customer Group	Retailer
Age	25
Date of buying	1969-12-01 00:00:00
Etensions you are interested in	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ

## New Shipment

New Shipment


 admin

[← Back](#)   [Reset](#)

---

Order & Account Information

**Order # 00000013** (The order confirmation email was sent)

Order Date	Jan 4, 2021, 10:46:47 PM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	162.158.179.56 (14.248.94.118, 162.158.179.56)

**Account Information** [Edit Customer](#)

Customer Name	Lee Hoang
Email	roni_cost@example.com
Customer Group	Retailer
Age	25
Extensions you are interested in	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ
Payment Preferences	Debit Card

## View Shipment

← Back
Login as Customer
Print
Send Tracking Information

### Order & Account Information

**Order # 00000013** (The order confirmation email was sent)

Order Date	Jan 4, 2021, 10:46:47 PM
Order Status	Complete
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	162.158.179.56 (14.248.94.118, 162.158.179.56)


**Account Information** [Edit Customer](#)

Customer Name	Lee Hoang
Email	roni_cost@example.com
Customer Group	Retailer
Age	25
Extensions you are interested in	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ
Payment Preferences	Debit Card



New Memo

New Memo


admin ▾

← Back   Reset

---

### Order & Account Information

**Order # 00000013** (The order confirmation email was sent)


Order Date	Jan 4, 2021, 10:46:47 PM
Order Status	Complete
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	162.158.179.56 (14.248.94.118, 162.158.179.56)

### Account Information [Edit Customer](#)

Customer Name	Lee Hoang
Email	roni_cost@example.com
Customer Group	Retailer
Age	25
Date of buying	1969-12-01 00:00:00
Etensions you are interested in	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ

View Memo

View Memo


admin ▾

← Back
Login as Customer
Send Email
Print

### Order & Account Information

**Order # 00000013** (The order confirmation email was sent)

Order Date	Jan 4, 2021, 10:46:47 PM
Order Status	Closed
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	162.158.179.56 (14.248.94.118, 162.158.179.56)

**Account Information** [Edit Customer](#)

Customer Name	Lee Hoang
Email	roni_cost@example.com
Customer Group	Retailer
Age	25
Date of buying	1969-12-01 00:00:00
Extensions you are interested in	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ

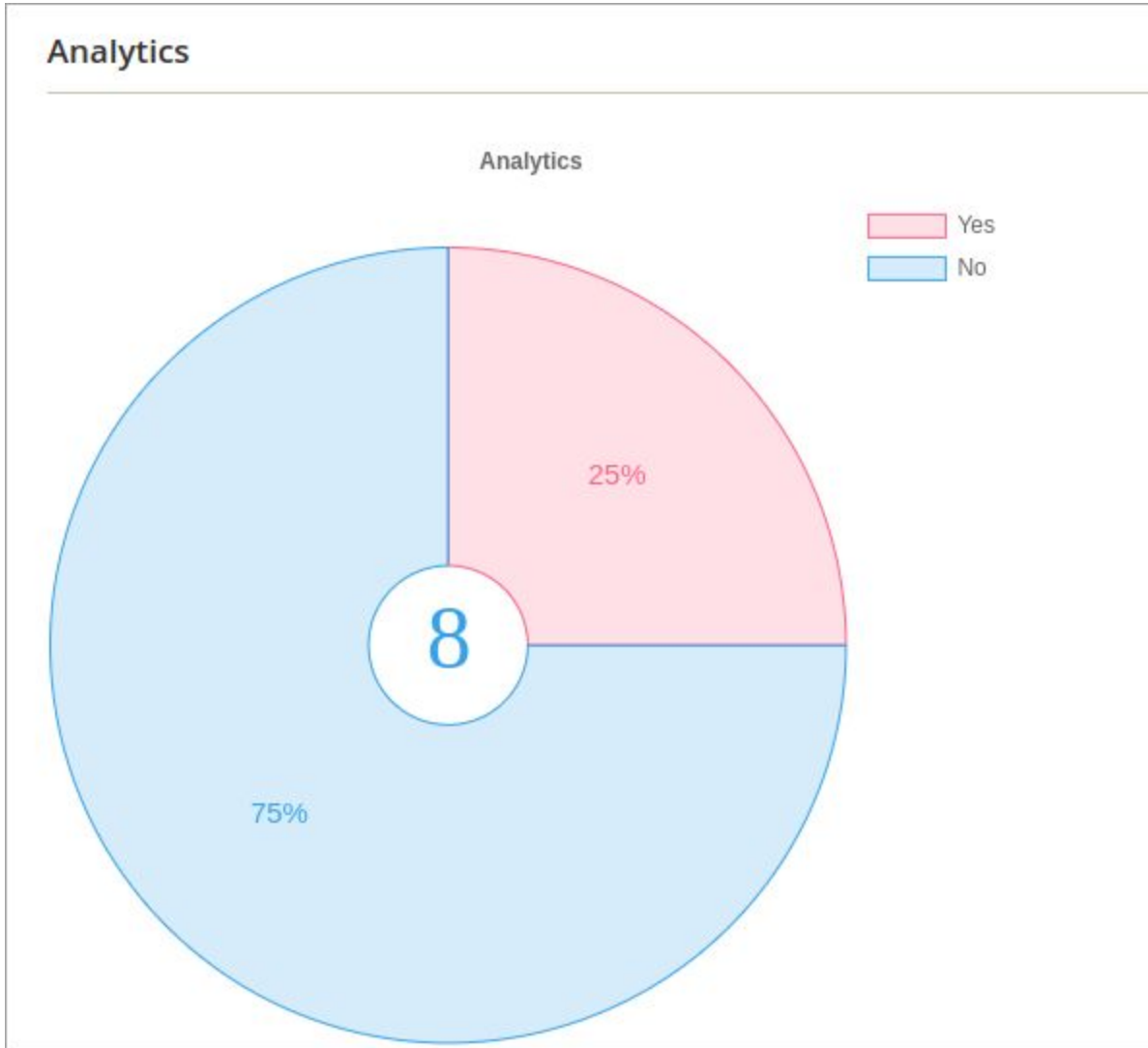
## Step 4 - Analytics

Analyze the data shown in a pie chart. This section will appear **ONLY WHEN** the input types are:

- **Yes/No**
- **Multiple select**
- **Select**
- **Visual Swatch**
- **Text Swatch**

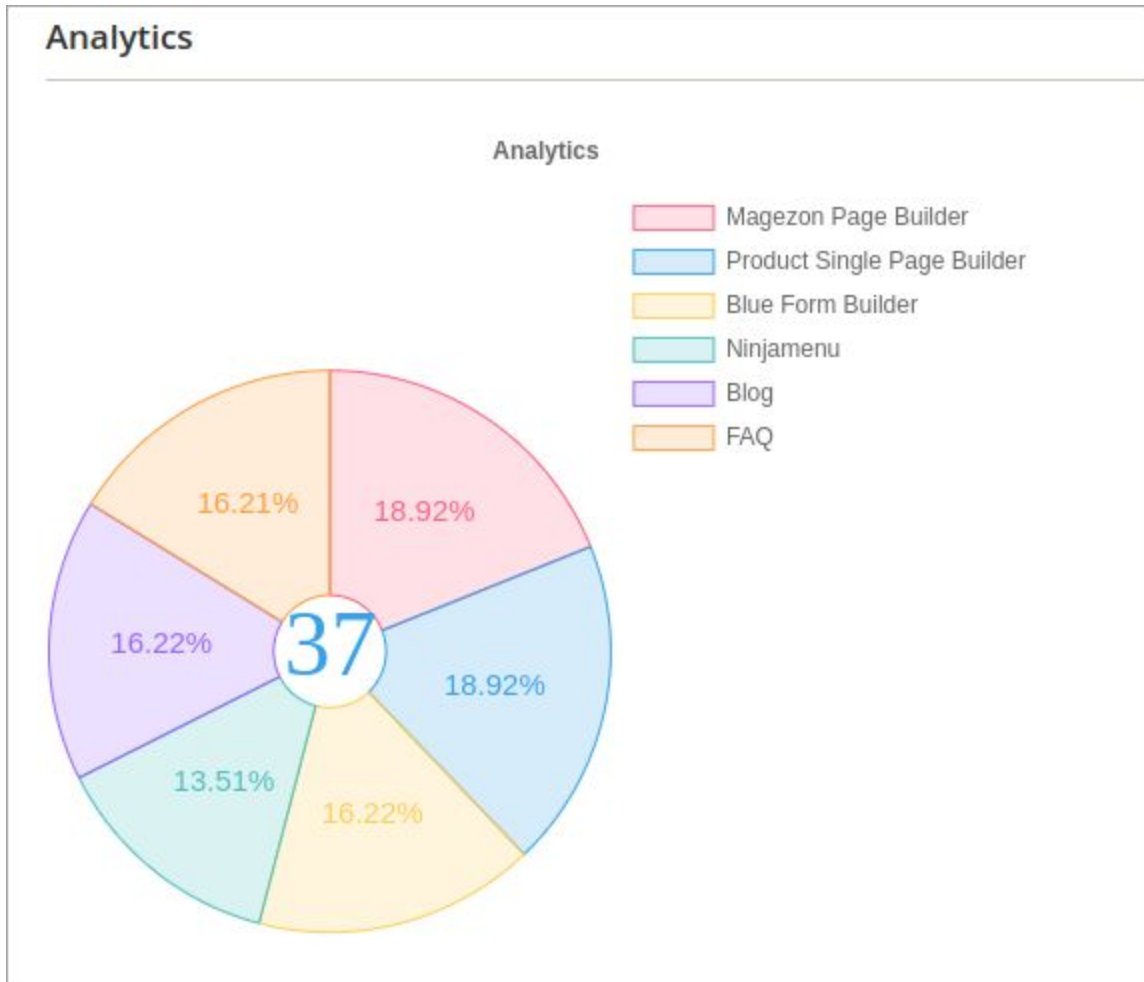
- Yes/No

Here is the attribute **Sign up for new product notifications:**



- **Multiple select**

Below is the attribute **Extension you are interested in?:**



- **Select**

Below is the attribute **Choose what Magezon extensions you like most**. The data hasn't been inputted in this field so its analytics will be:

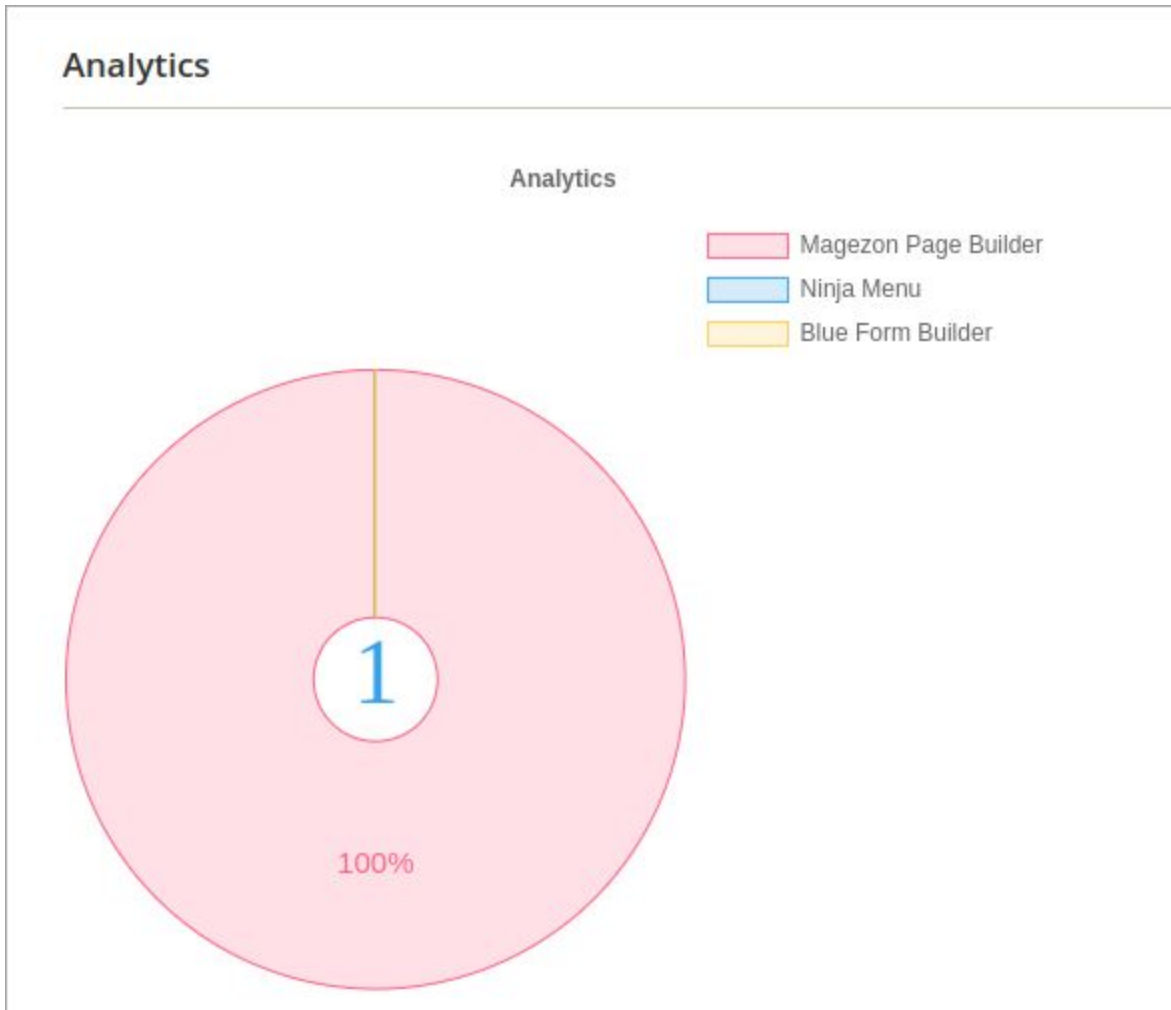
### Analytics

---

Not found data

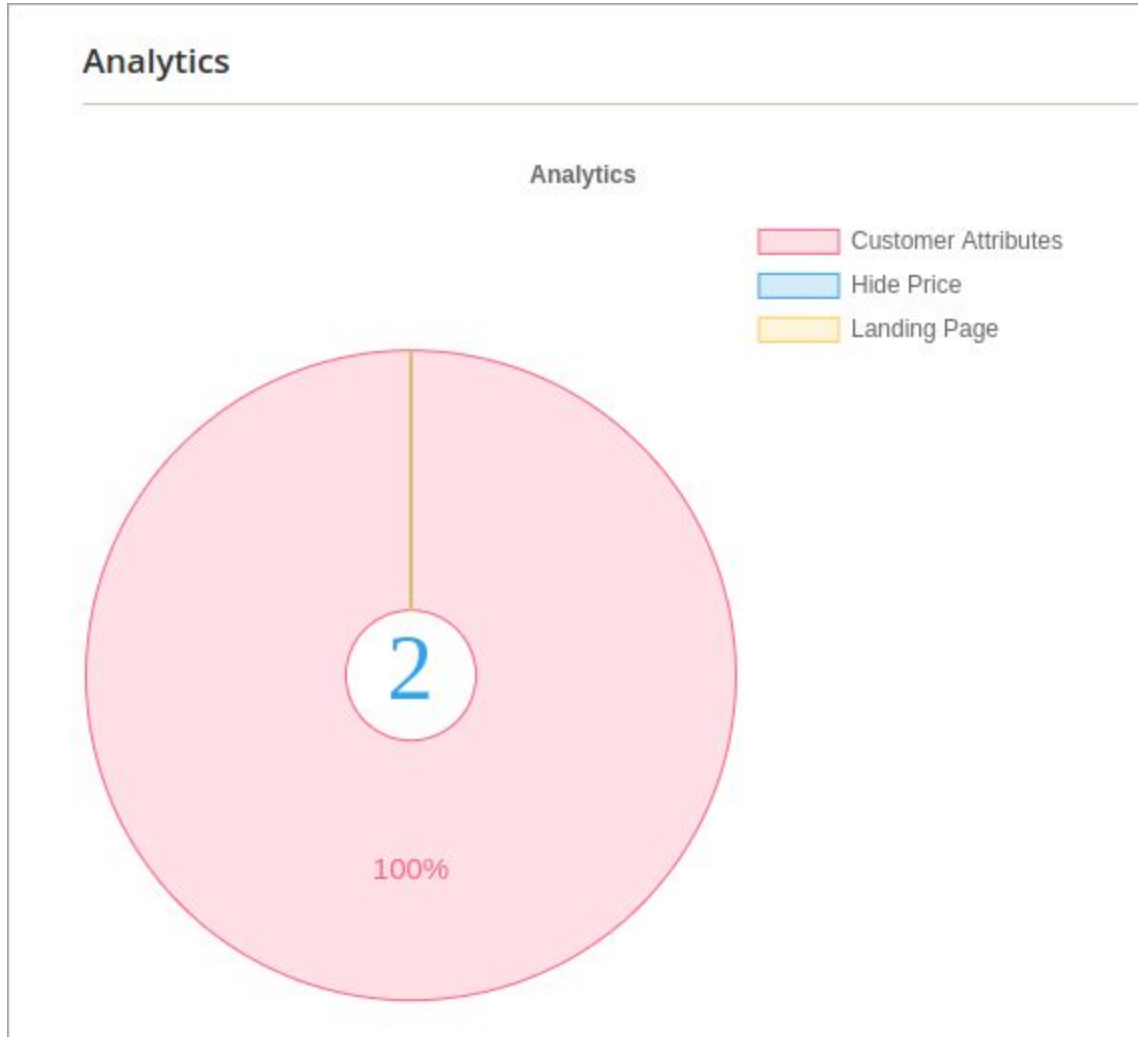
**- Visual Swatch**

Below is the attribute **What products did you buy from Magezon?:**



- **Text Swatch**

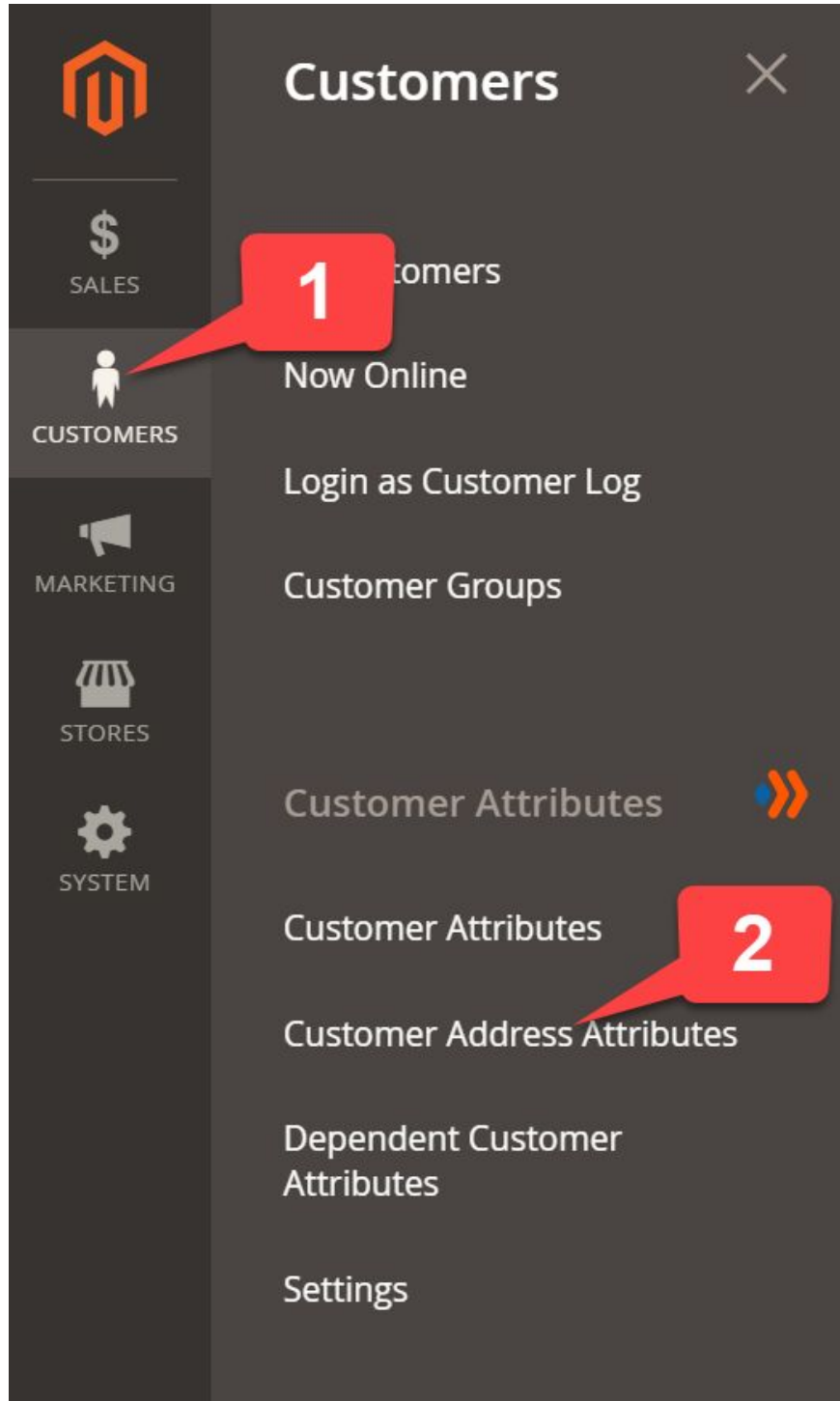
Below is the attribute **Pick one of our coming soon product you need:**






### 3.3. Create a Customer Address

- Navigate to **Customers** → **Customer Attributes** → **Address Attributes**.



Then, you will be redirected to the Customer Address Attributes Grid which shows all address customer attributes. You can easily manage them (filter, column, delete, update status, etc.)

 Customer Addresses ▾
demo ▾

Add New Attribute

Filters
Columns ▾
Default View ▾

Actions ▾
10 records found
20 ▾ per page
< 1 of 1 >

<input type="checkbox"/>	Attribute ID	Attribute Code	Default Label	Input Type	Required	System	Sort Order	Visible in Customer Grid	Action
<input type="checkbox"/>	181	bonus	Bonus	Text	No	No	0	No	<a href="#">Edit</a>
<input type="checkbox"/>	180	desired_delivery_date	Desired delivery date	Date	No	No	0	No	<a href="#">Edit</a>
<input type="checkbox"/>	179	classification	Classification	Multi-select	No	No	0	No	<a href="#">Edit</a>
<input type="checkbox"/>	178	accept_all_terms	Accept all terms	Multi-select	No	No	0	No	<a href="#">Edit</a>

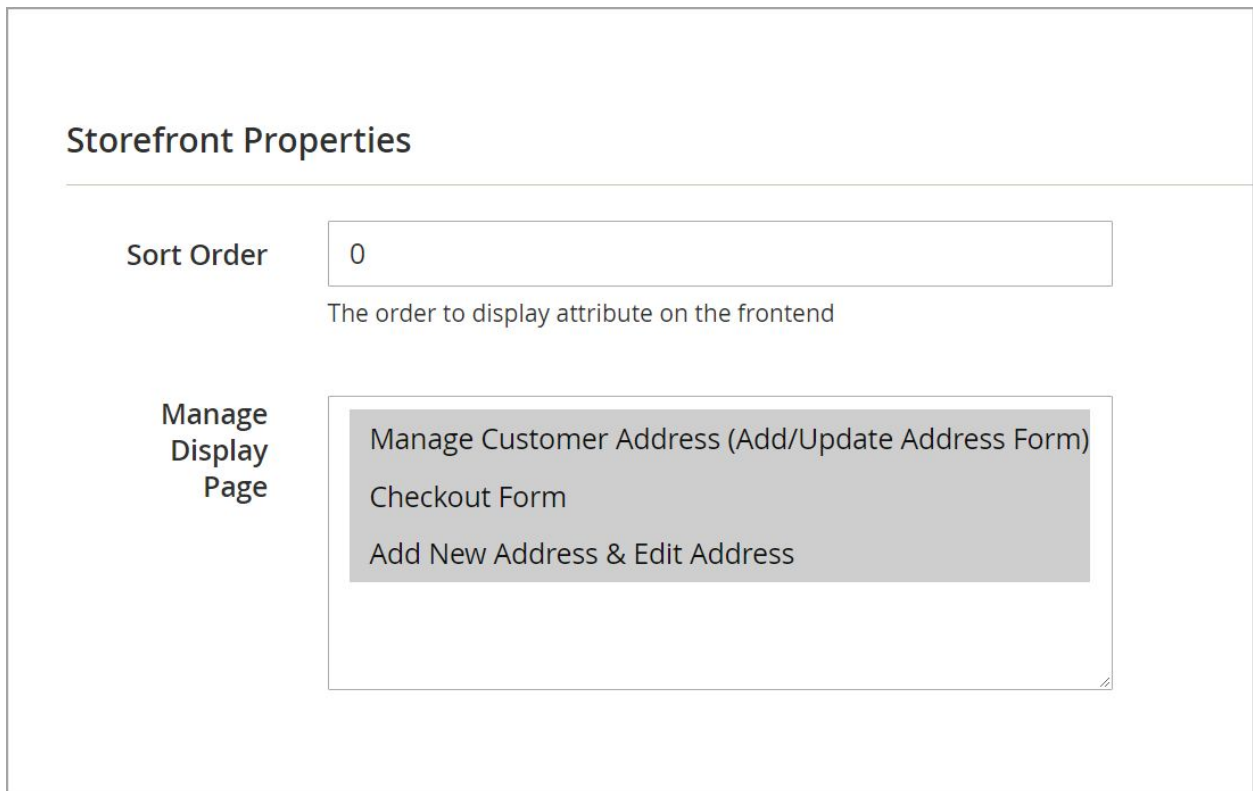
**Step 1, Step 2, Step 4** are the same as the ones of the **Customer Attribute** section above. We just focus on **Step 3** only for **Customer Address Attributes**, particularly the positions which attributes are on display.

Let's take a look at the **Manage Display Pages** field:

There are 3 positions for address attributes to display:

- **Manage Customer Information**
- **Checkout Forms**
- **Add New Address & Edit Address**

Let me show the attribute field **Apartment number** in these 3 positions as an example:



**Storefront Properties**

Sort Order   
The order to display attribute on the frontend

Manage Display Page

- Manage Customer Addresses (Add/Update Address Form):

Add/Update Address


Recipient's name

Phone number   
phone number of the consignee

Payment Preferences  ▼

Online Payment Method  ▼

Door delivery  Yes  
Door to door delivery

Desired delivery date  

Classification

Apartment number

---

- **Checkout Form**

Shipping Address ✕

First Name \*

Last Name \*

Company

Street Address \*

Cancel

- Add New Address & Edit Address
  - + Add New Address

## Add New Address

Contact Information	Address
<p><b>First Name *</b></p> <input type="text" value="Lee"/>	<p><b>Street Address *</b></p> <input type="text"/>
<p><b>Last Name *</b></p> <input type="text" value="Hoang"/>	<p><b>Country *</b></p> <input type="text" value="United States"/>
<p><b>Company</b></p> <input type="text"/>	<p><b>State/Province *</b></p> <input type="text" value="Please select a region, state or province."/>
<p><b>Phone Number *</b></p> <input type="text"/>	<p><b>City *</b></p> <input type="text"/>
	<p><b>Zip/Postal Code *</b></p> <input type="text"/>
	<p><b>Apartment number</b></p> <input type="text" value="508"/>

+ Edit Address

### Edit Address

Contact Information	Address
<b>First Name *</b> <input type="text" value="Lee"/>	<b>Street Address *</b> <input type="text" value="6146 Honey Bluff Parkway"/>
<b>Last Name *</b> <input type="text" value="Hoang"/>	<b>Country *</b> <input type="text" value="United States"/>
<b>Company</b> <input type="text"/>	<b>State/Province *</b> <input type="text" value="Michigan"/>
<b>Phone Number *</b> <input type="text" value="(555) 229-3326"/>	<b>City *</b> <input type="text" value="Calder"/>
	<b>Zip/Postal Code *</b> <input type="text" value="49628-7978"/>
	<b>Accept all terms</b> <input checked="" type="checkbox"/> Accept all terms at this
	<b>Apartment number</b> <input type="text" value="508"/>

### 3.4. Create a Dependent Customer Attribute

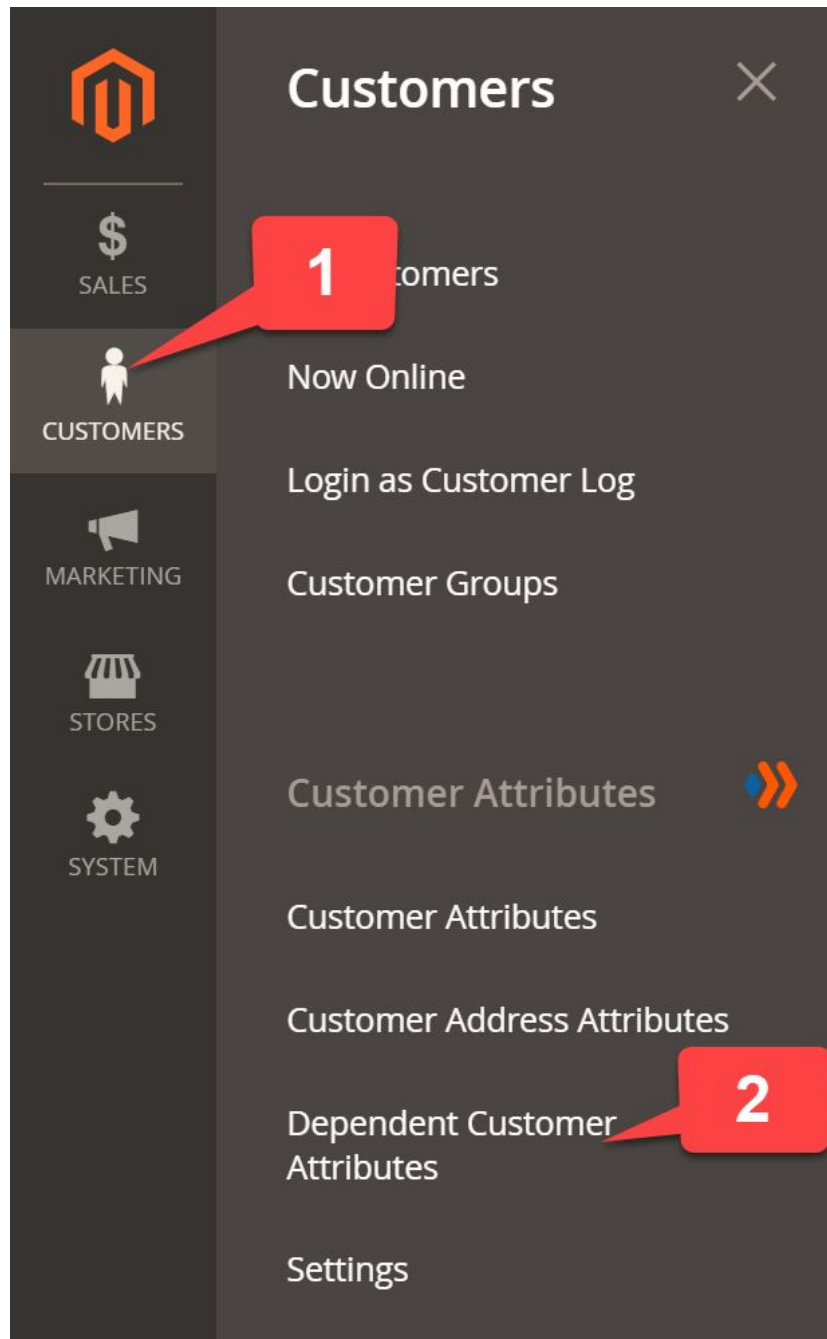
*\*Apply for Customer Attributes, not Customer Address Attributes*

- Dependent Customer Attributes include parent attributes and dependent attributes. These dependent attributes will be shown **ONLY IF** a customer selects specified values of a parent customer attribute.
- Bear in mind, dependent attribute fields can be used **ONLY WHEN** their input types are:
  - **Yes/No**
  - **Select**
  - **Text Swatch**
  - **Visual Swatch**
  - **Multiple Select**

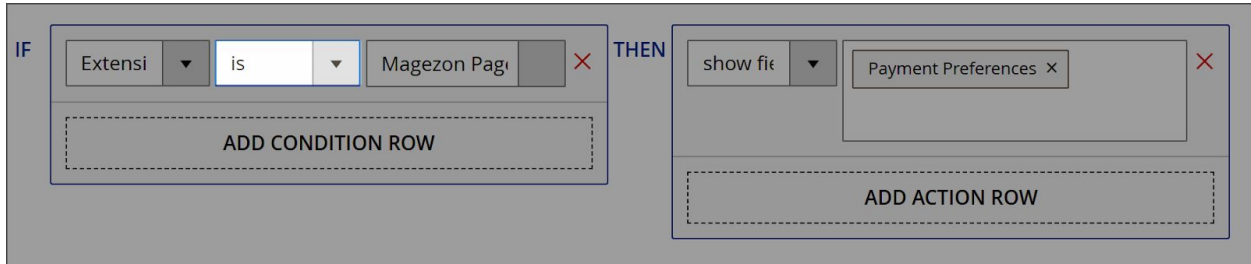


- To create a dependent customer attribute, navigate to:

**Customers → Customer Attributes → Dependable Customer Attributes.**

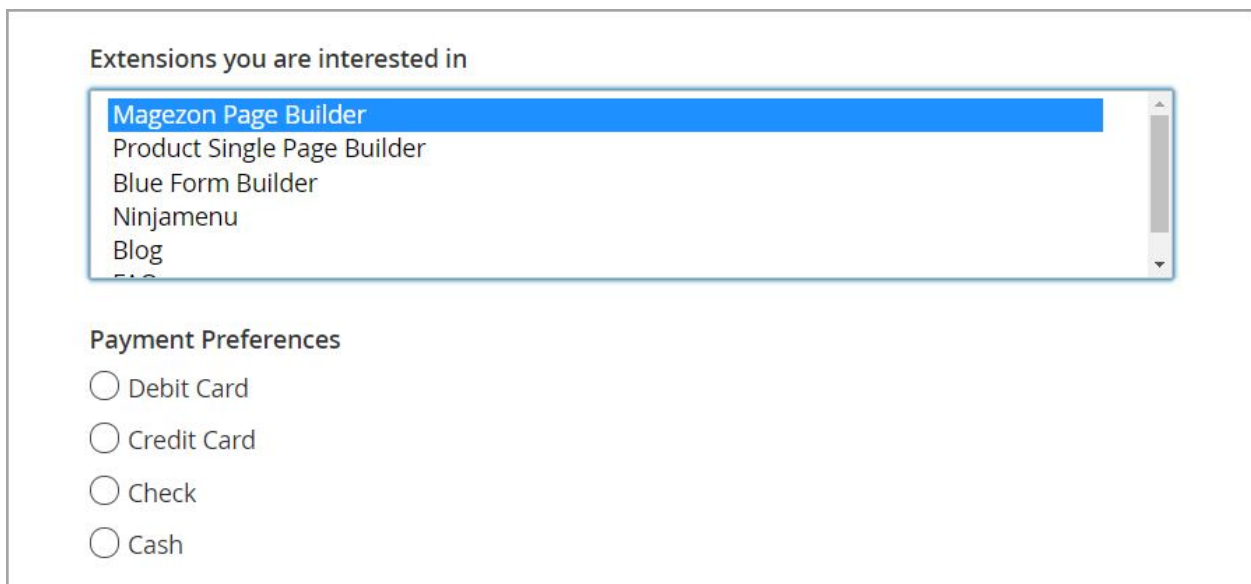


Take the attribute field “**Extensions you are interested in**” as an example. Please pay more attention to the box “**is**”.



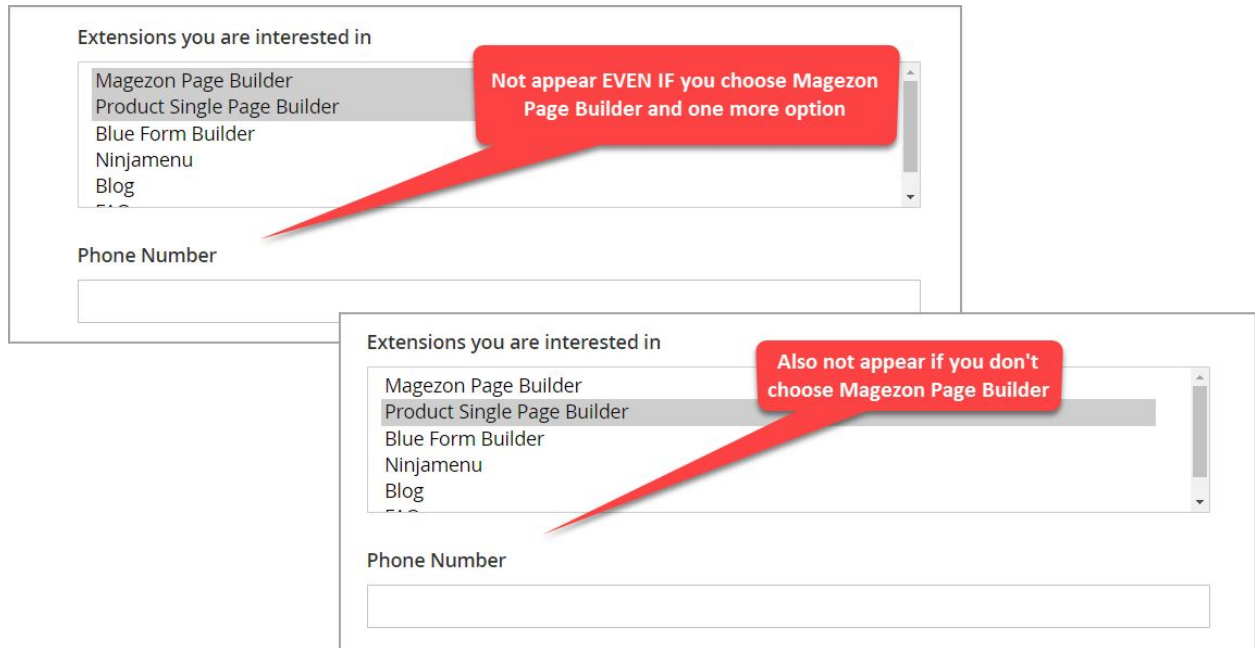
The screenshot shows a rule builder interface with two main sections: 'IF' and 'THEN'.  
In the 'IF' section, there is a dropdown menu with 'Extensi' selected, followed by a comparison operator dropdown with 'is' selected, and a text input field containing 'Magezon Page Builder'. Below this is a dashed box labeled 'ADD CONDITION ROW'.  
In the 'THEN' section, there is a dropdown menu with 'show fi' selected, followed by a text input field containing 'Payment Preferences'. Below this is a dashed box labeled 'ADD ACTION ROW'.

Based on the condition above, if **Extensions you are interested in is Magezon Page Builder**, the field **Payment Preference** will show up. That means, this field will appear when you choose **Magezon Page Builder ONLY**.



The screenshot shows a dropdown menu titled 'Extensions you are interested in'. The dropdown is open, showing a list of options: 'Magezon Page Builder' (highlighted in blue), 'Product Single Page Builder', 'Blue Form Builder', 'Ninjamenu', 'Blog', and 'F12'. Below the dropdown is a section titled 'Payment Preferences' with four radio button options: 'Debit Card', 'Credit Card', 'Check', and 'Cash'.

If you take one of other options , the field **Payment Preference** will not appear. Even if you choose **Magezon Page Builder** along with one more option, this field will still not show up.

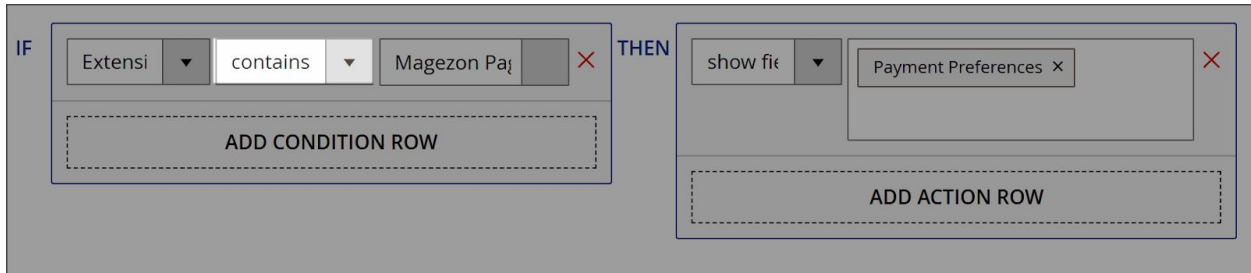


The image shows two screenshots of a form. Both screenshots have a section titled "Extensions you are interested in" with a list of options: Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, and Blog. Below this list is a "Phone Number" input field.

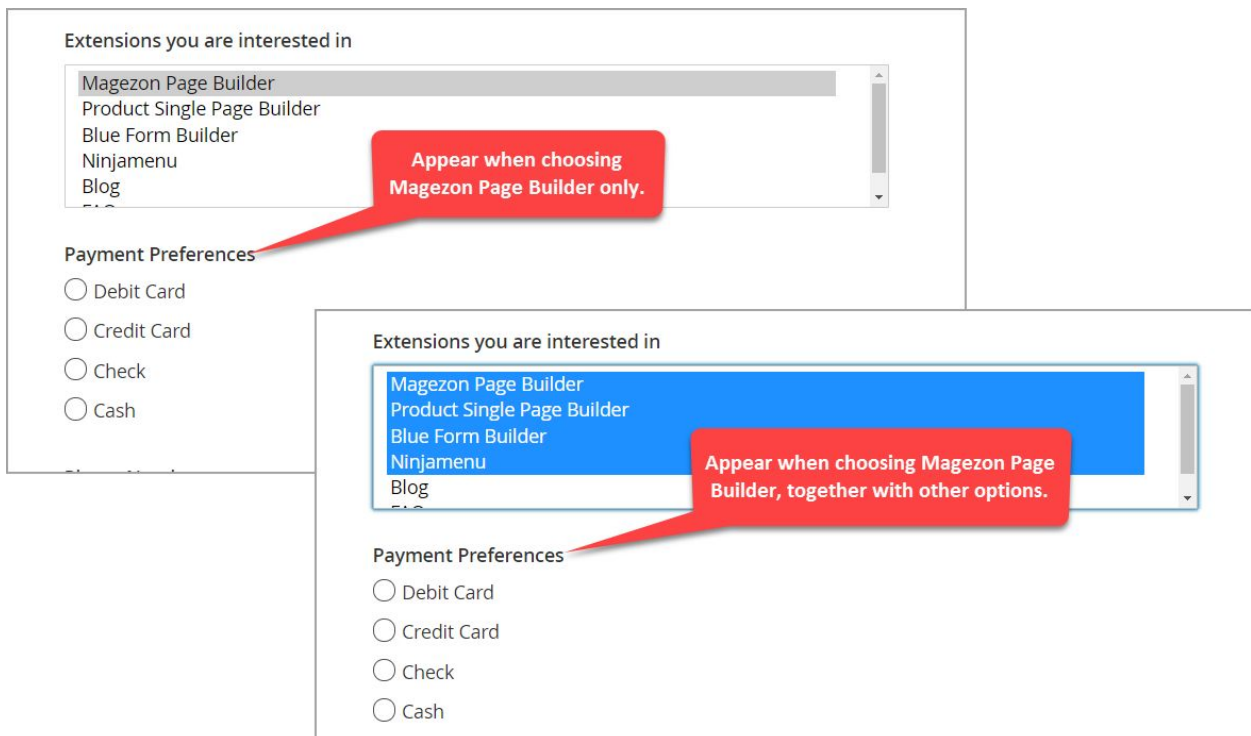
**Top Screenshot:** The "Magezon Page Builder" option is selected. A red callout bubble points to the list with the text: "Not appear EVEN IF you choose Magezon Page Builder and one more option".

**Bottom Screenshot:** The "Product Single Page Builder" option is selected. A red callout bubble points to the list with the text: "Also not appear if you don't choose Magezon Page Builder".

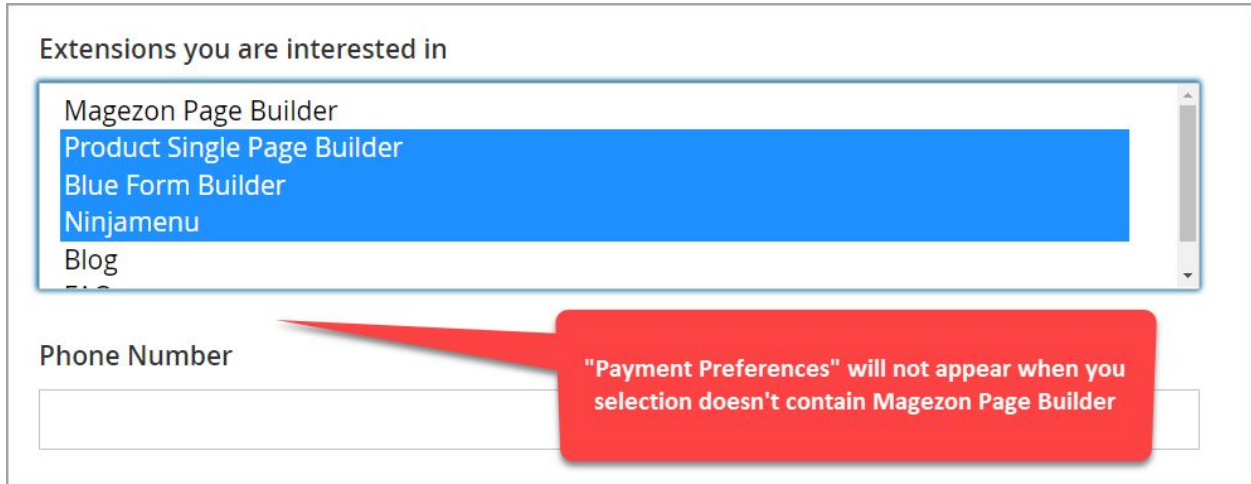
We continue using the attribute field **Extensions you are interested in** as an example. Take a closer look when we set “**contains**”.



If “**Extensions you are interested in**” **contains** **Magezon Page Builder**, the field “**Payment Preference**” will appear. That means, if your selection **INCLUDES** **Magezon Page Builder** (Magezon Page Builder only or together with other options), **Payment Preference** will show up for sure.



See? The attribute field **Payment Preferences** does not appear when your answer doesn't contain **Magezon Page Builder**.



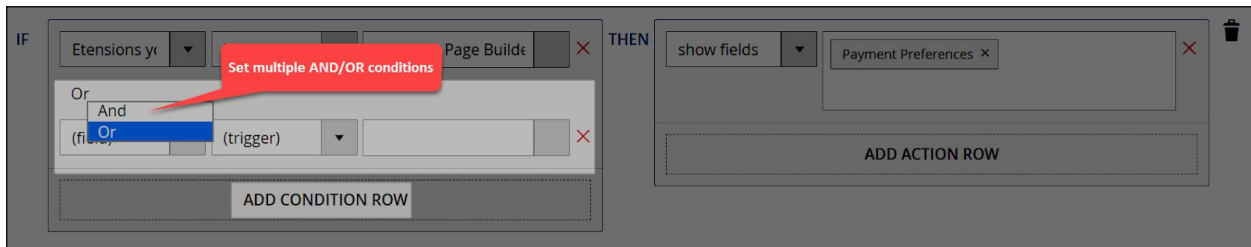
Extensions you are interested in

- Magezon Page Builder
- Product Single Page Builder
- Blue Form Builder
- Ninjamenu
- Blog

Phone Number

"Payment Preferences" will not appear when you selection doesn't contain Magezon Page Builder

Besides, you can set multiple **AND/OR** conditions simply by clicking **ADD CONDITION ROW**.



IF

Extensions y... Page Builde

Or

And

(fi... Or (trigger)

Set multiple AND/OR conditions

THEN

show fields

Payment Preferences

ADD ACTION ROW

ADD CONDITION ROW

## IV) Apply Customer Attributes in Emails

For customer attributes, you can include them in emails sent to customers, by adding the attributes to the code of your email template.

To illustrate, we choose **Default Welcome email** (New Account) as an example.

There are 2 main steps you need to follow:

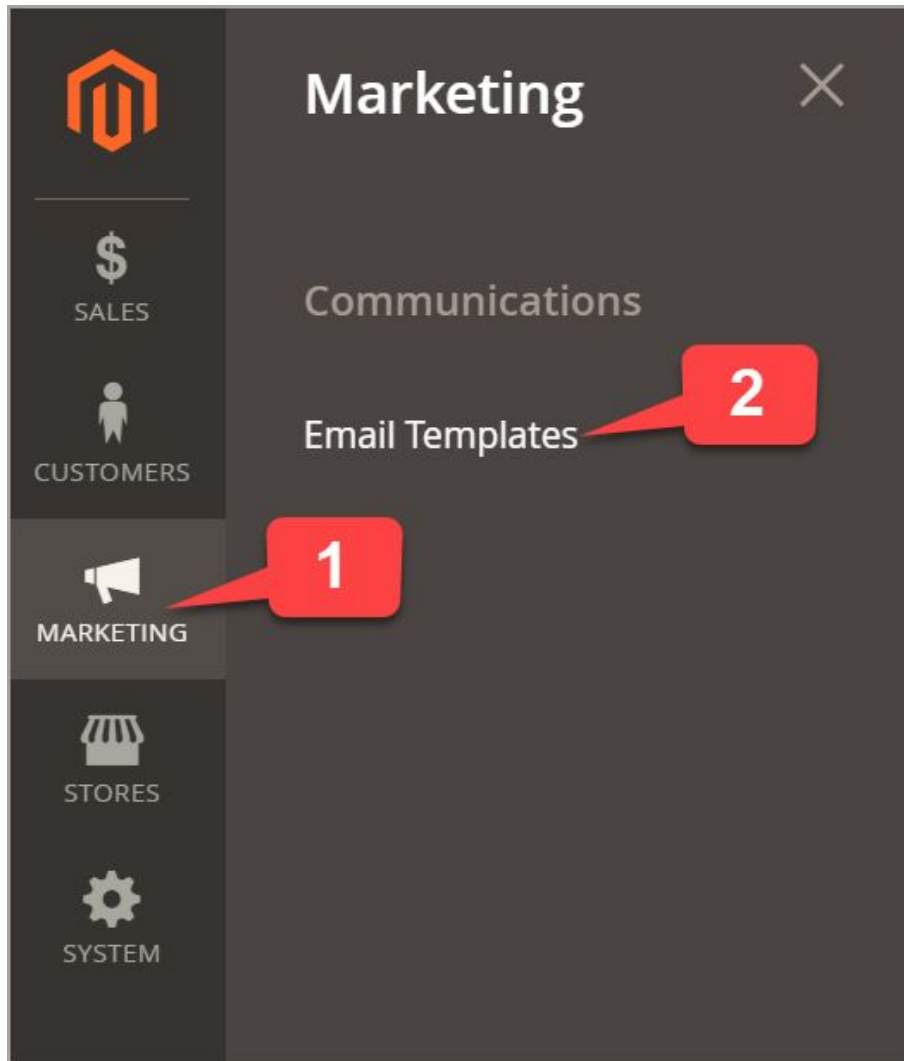
**Step 1:** Create a new Default Welcome email template with customer attributes.

**Step 2:** Set this new template as the Default Welcome email template.

Now we will show you how.

Step 1: Create a new email template with customer attributes

- First, go to **Marketing** → **Communications** → **Email Templates**.



- There appears the page **Email Templates**. Click on **Add New Template** on the upper right corner.

## Email Templates demo ▾

Add New Template

Search
Reset Filter
2 records found

20
▾
per page
<
1
of 1
>

ID	Template	Added	Updated	Subject	Template Type	Action
<input type="text"/>	<input type="text"/>	From To	From To	<input type="text"/>	<input type="text"/>	
1	New Account With Attribute Company	Dec 12, 2020, 2:34:08 AM	Dec 27, 2020, 7:43:56 PM	{{trans "Welcome to %store_name" store_name=\$store.frontend_name}}	HTML	<a href="#">Preview</a>
2	Reset Password	Dec 14, 2020, 8:35:16 PM	Dec 14, 2020, 8:35:16 PM	{{trans "Reset your %store_name password" store_name=\$store.frontend_name}}	HTML	<a href="#">Preview</a>



- You will be redirected to the **New Template** page. Choose **New Account** as the default template from a dropdown list. Click on the **Load Template** button.

Under the **Template Information** section, enter the name of the template in **Template Name**.

### Load Default Template

Template \*

### Template Information

Template Name \*

Template Subject \*

Template Content \* 

```
{{template config_path="design/email/header_template"}}  
  
<p class="greeting">{{trans "%name," name=$customer.name}}</p>  
<p>{{trans "Welcome to %store_name." store_name=$store.frontend_name}}</p>  
<p>
```

Template Styles

- Then, insert the attribute to the code:

**For example:** If your customer attribute is **Your Company name** and **Your position in the company**, insert the following in **Template Content**:

```

{{var $customer.your_company_name}}

{{var $customer.your_position_in_the_company}}
    
```

**Template Content \***

```

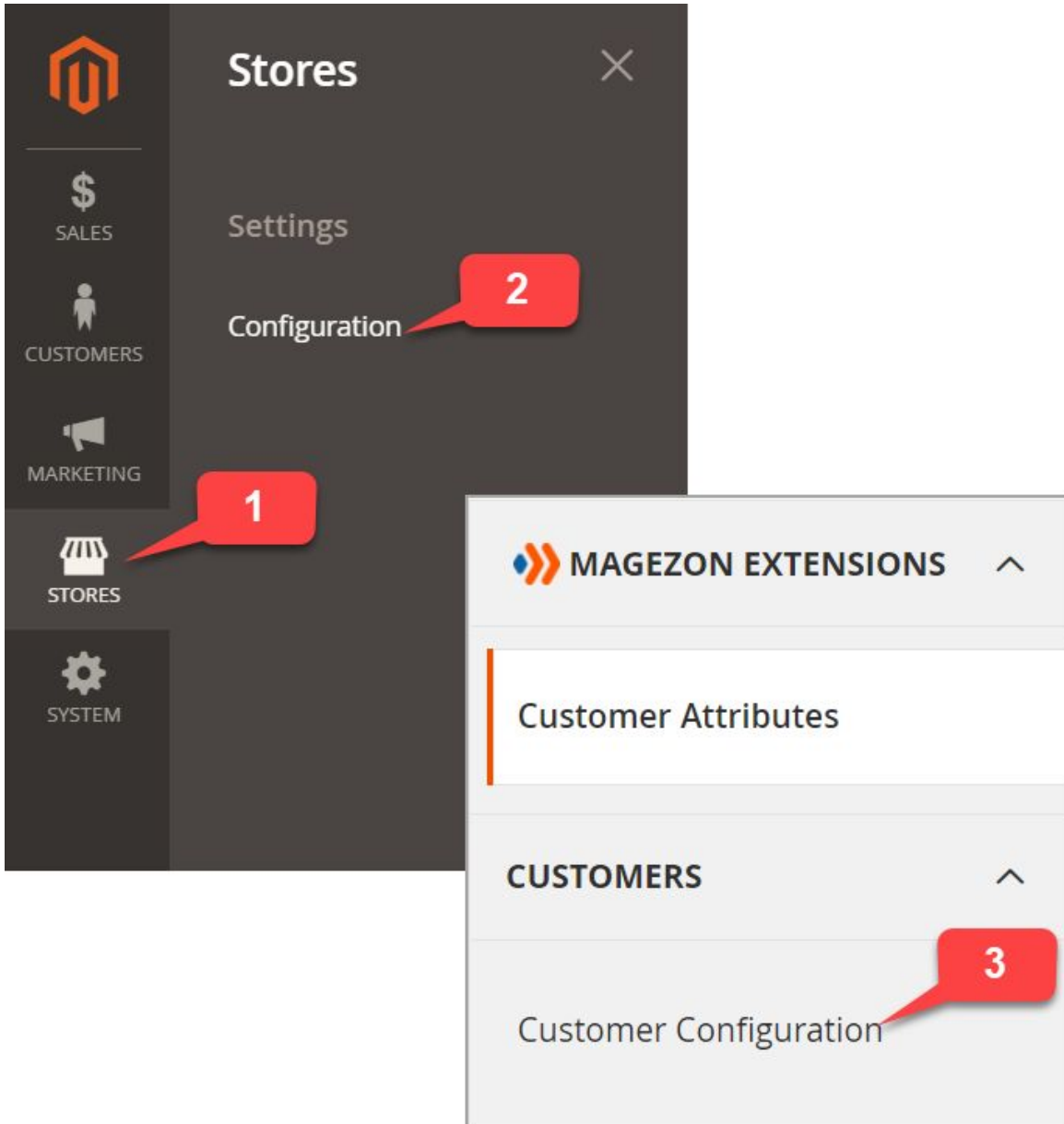
{{template config_path="design/email/header_template"}}

<p class="greeting">{{trans "%name," name=$customer.name}}
</p>
<p>{{trans "Welcome to %store_name."
store_name=$store.frontend_name}}</p>
<p>
    {{trans
        'To sign in to our site, use these credentials during checkout
        or on the <a href="%customer_url">My Account</a> page:'
        customer_url=$this.getUrl($store,'customer/account/',
        [_nosid:1])
        |raw}}
    </p>
<ul>
<li><strong>{{trans "Email:"}}</strong> {{var
$customer.email}}</li>
<li><strong>{{trans "Password:"}}</strong> <em>{{trans
"Password you set when creating account"}}</em></li>
<li><strong>{{trans "Your Company:"}}</strong> {{var
$customer.your_company_name}}</li>
<li><strong>{{trans "Your work position:"}}</strong> {{var
$customer.your_position_in_the_company}}</li>
<li><strong>{{trans "Your Gender:"}}</strong> {{var
$customer.attributes.sex}}</li>
</ul>
<p>
    
```

- Hit **Save Template** after completing.

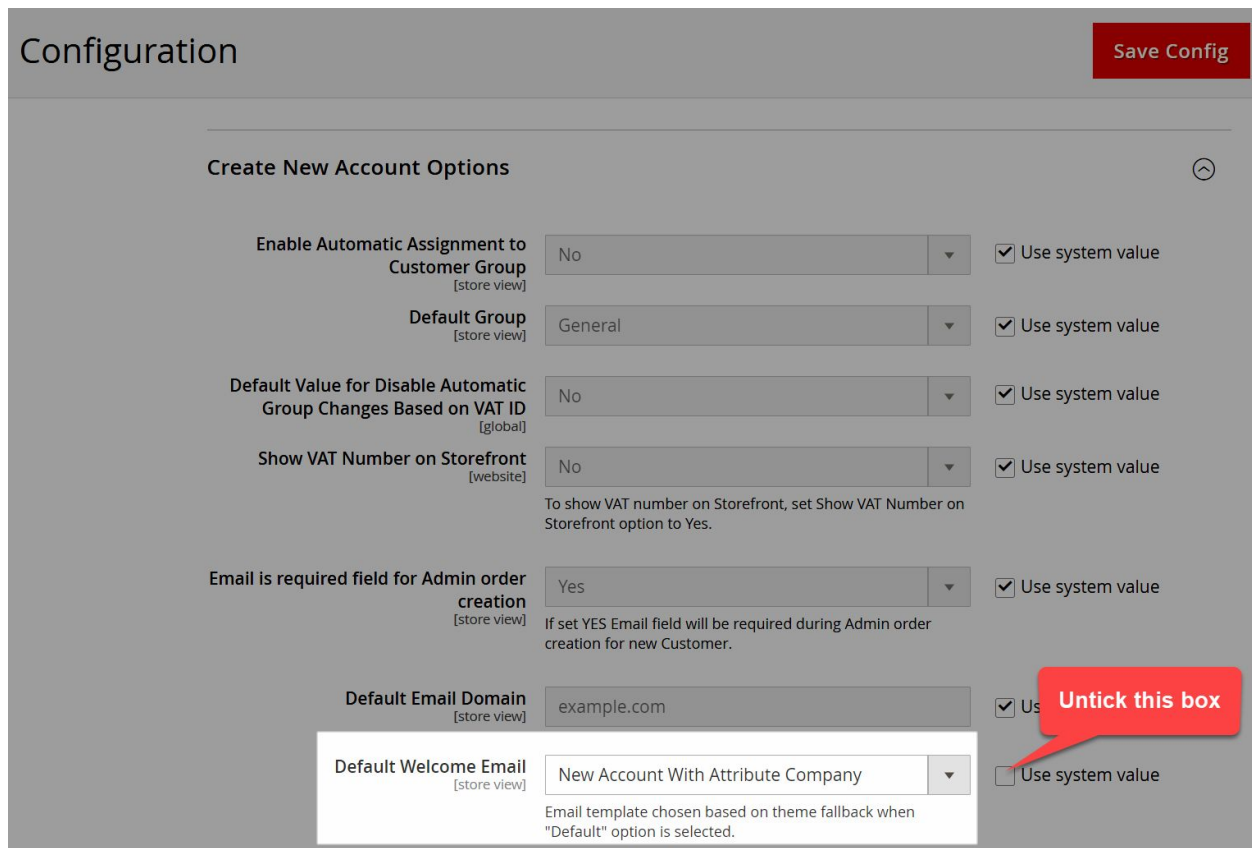
## Step 2: Set this new template as the New Account template

To set the newly-created template as the New Account template, navigate to **Stores** → **Stores** → **Settings** → **Configuration**. Continue **Customers** → **Customer Configuration**.



Then, you will be redirected to the page **Configuration**.

- Scroll down to the section **Create New Account Options**. At **Default Welcome Email**, untick **Use system value** box.
- Next, choose the newly-created template **New Account With Attribute Company**.
- Hit **Save Config** to complete the settings.



**Configuration** Save Config

### Create New Account Options

Enable Automatic Assignment to Customer Group   Use system value

Default Group   Use system value

Default Value for Disable Automatic Group Changes Based on VAT ID   Use system value

Show VAT Number on Storefront   Use system value

To show VAT number on Storefront, set Show VAT Number on Storefront option to Yes.

Email is required field for Admin order creation   Use system value

If set YES Email field will be required during Admin order creation for new Customer.

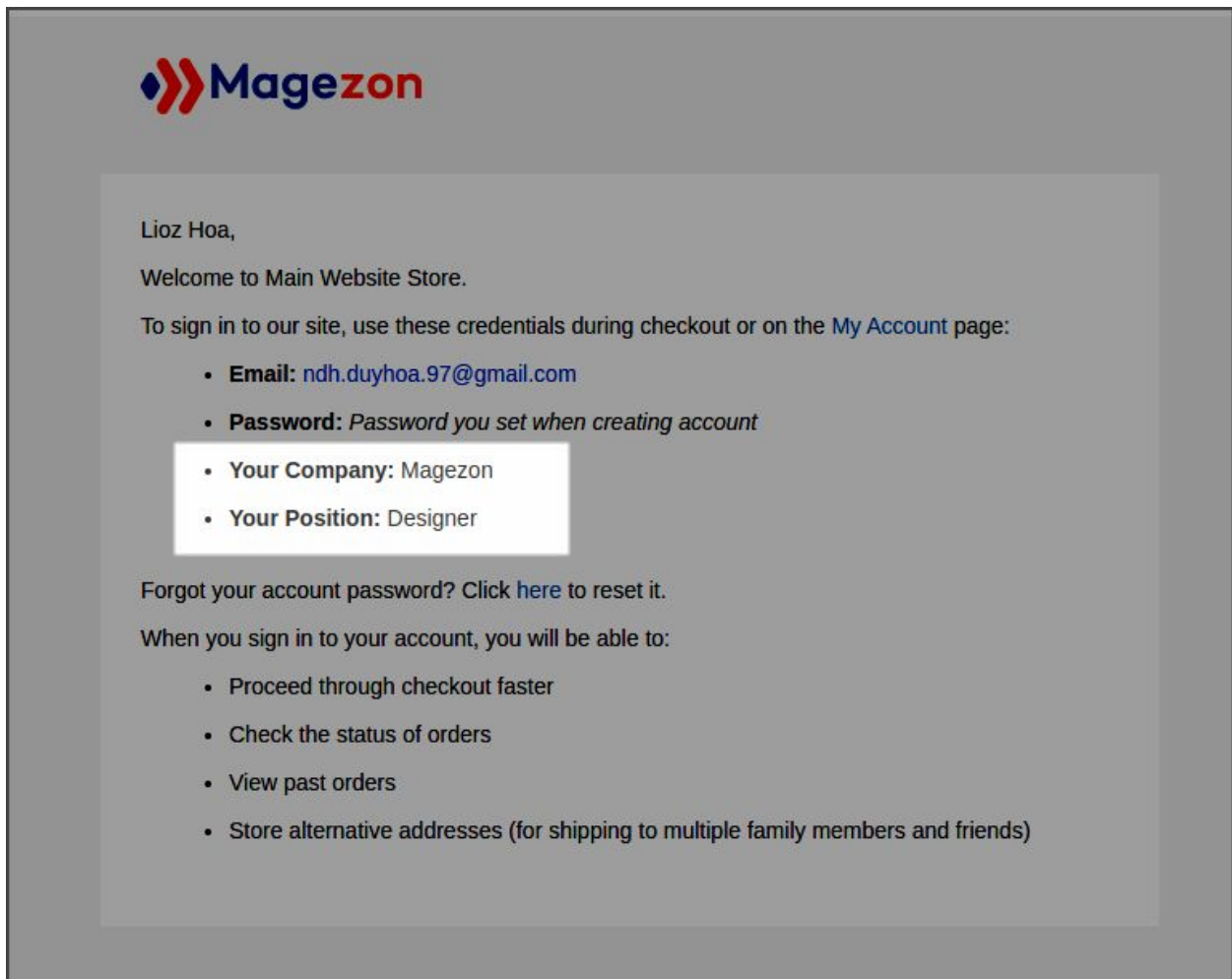
Default Email Domain   Use system value

Default Welcome Email   Use system value

Email template chosen based on theme fallback when "Default" option is selected.

**Untick this box**

And below is the new New Account email template:



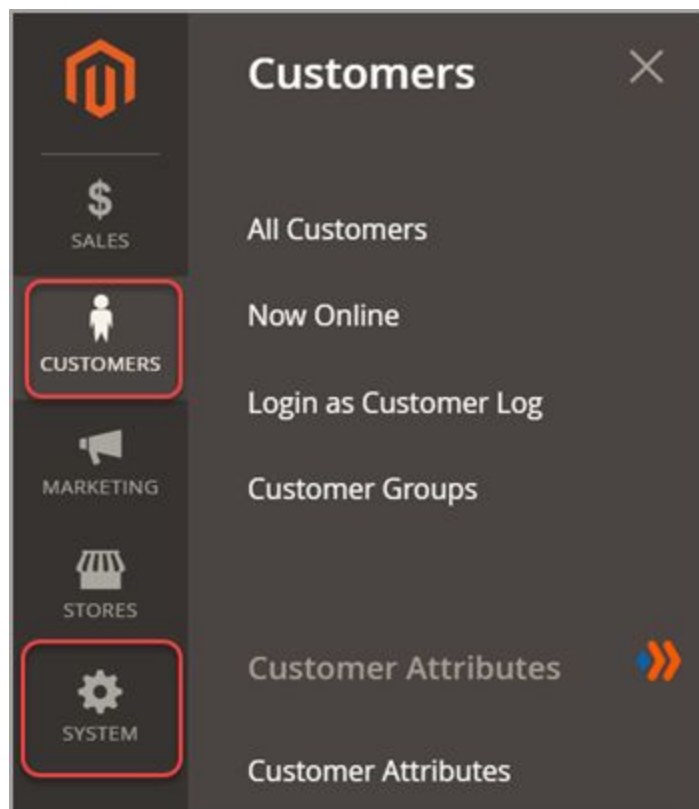
## V) Export/Import Customer Data with Custom Attributes

This extension enables you to export and import customer data which includes the custom attributes (Customer attributes & customer address attributes).

### 5.1. Export Customer Data with Custom Attributes

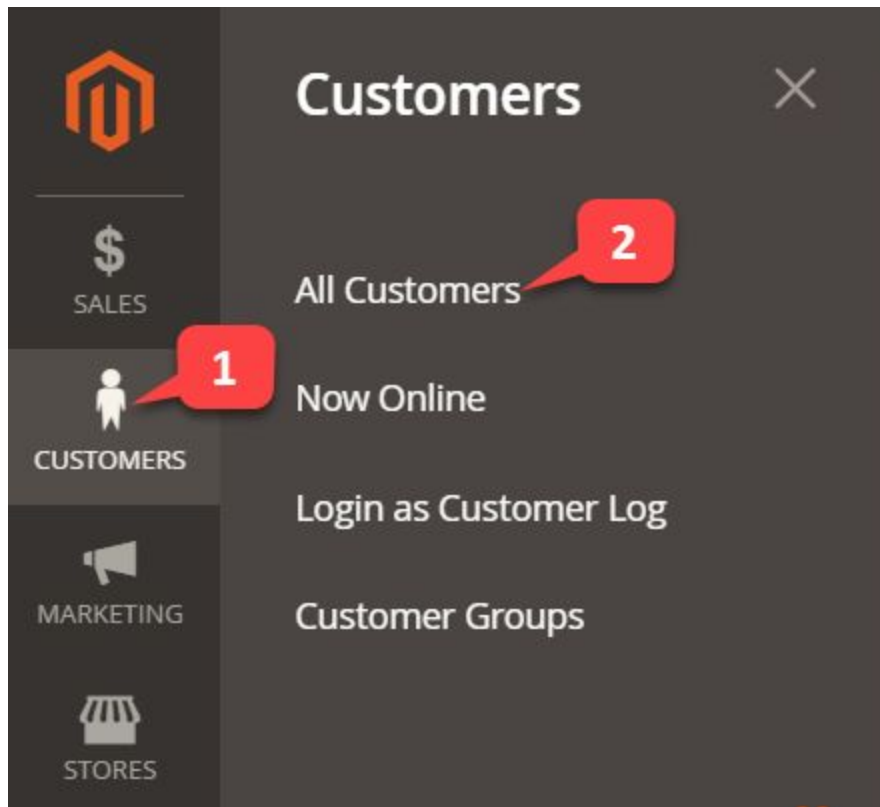
There are 2 places to export the customer data from:

- **Customers**
- **System**



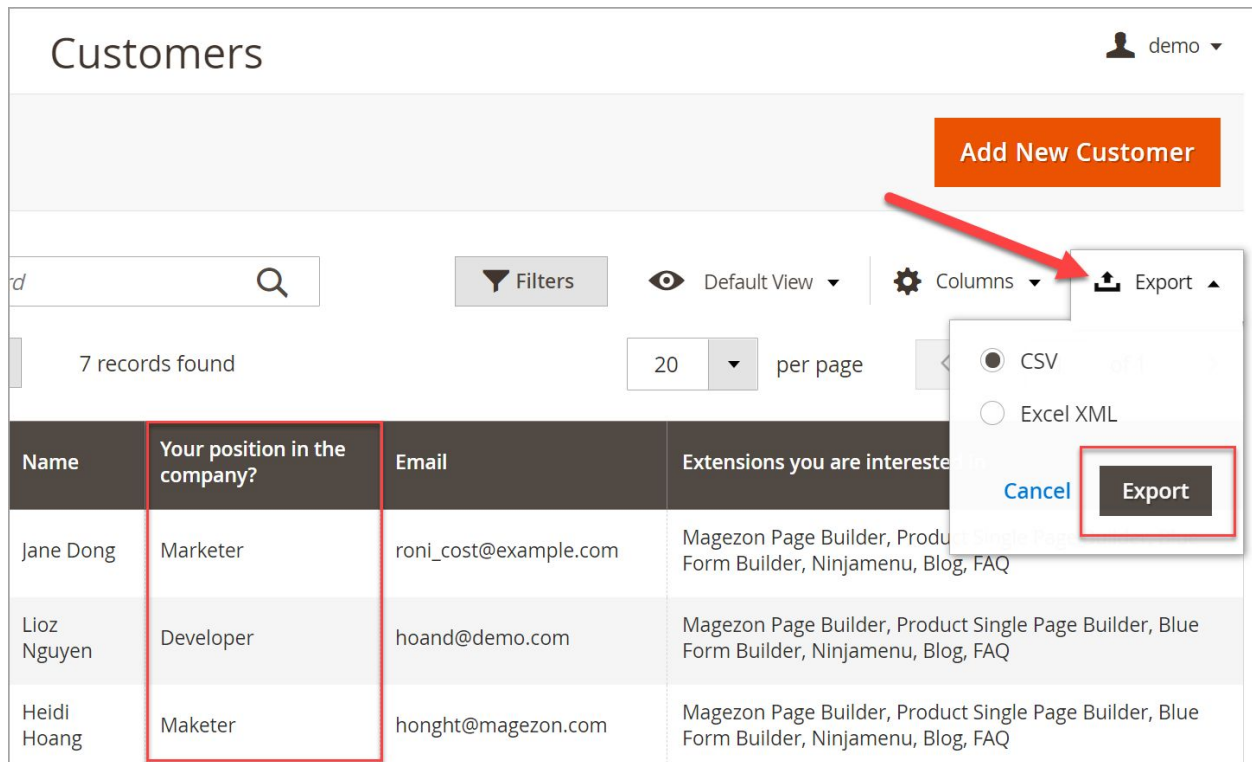
## 5.1.1. Export from Customers

- Go to **Customers** → **All Customers**.



- Click on the **Export** button on the right upper corner. This will export all attributes displayed on the customer grid. Select **CSV** or **Excel XML** for your preference. Hit **Export** to export the file.

**NOTE:** We take the attribute **Your position in your company** for example.



Customers demo

[Add New Customer](#)

Search:  Filters Default View Columns Export

7 records found 20 per page

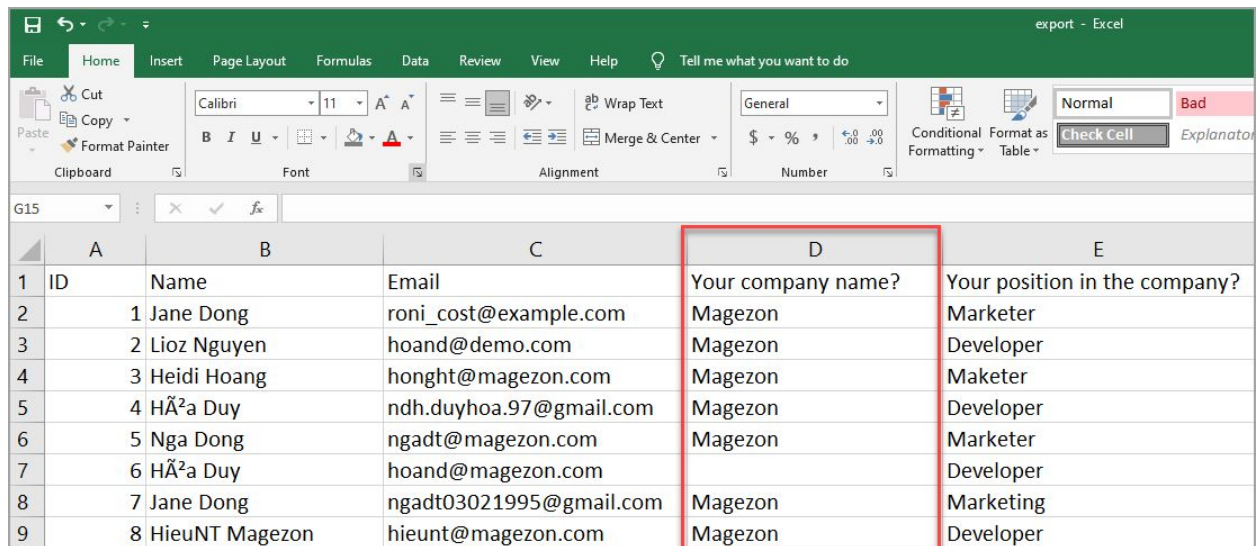
Name	Your position in the company?	Email	Extensions you are interested in
Jane Dong	Marketer	roni_cost@example.com	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ
Lioz Nguyen	Developer	hoand@demo.com	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ
Heidi Hoang	Maketer	honght@magezon.com	Magezon Page Builder, Product Single Page Builder, Blue Form Builder, Ninjamenu, Blog, FAQ

CSV  Excel XML

[Cancel](#) [Export](#)



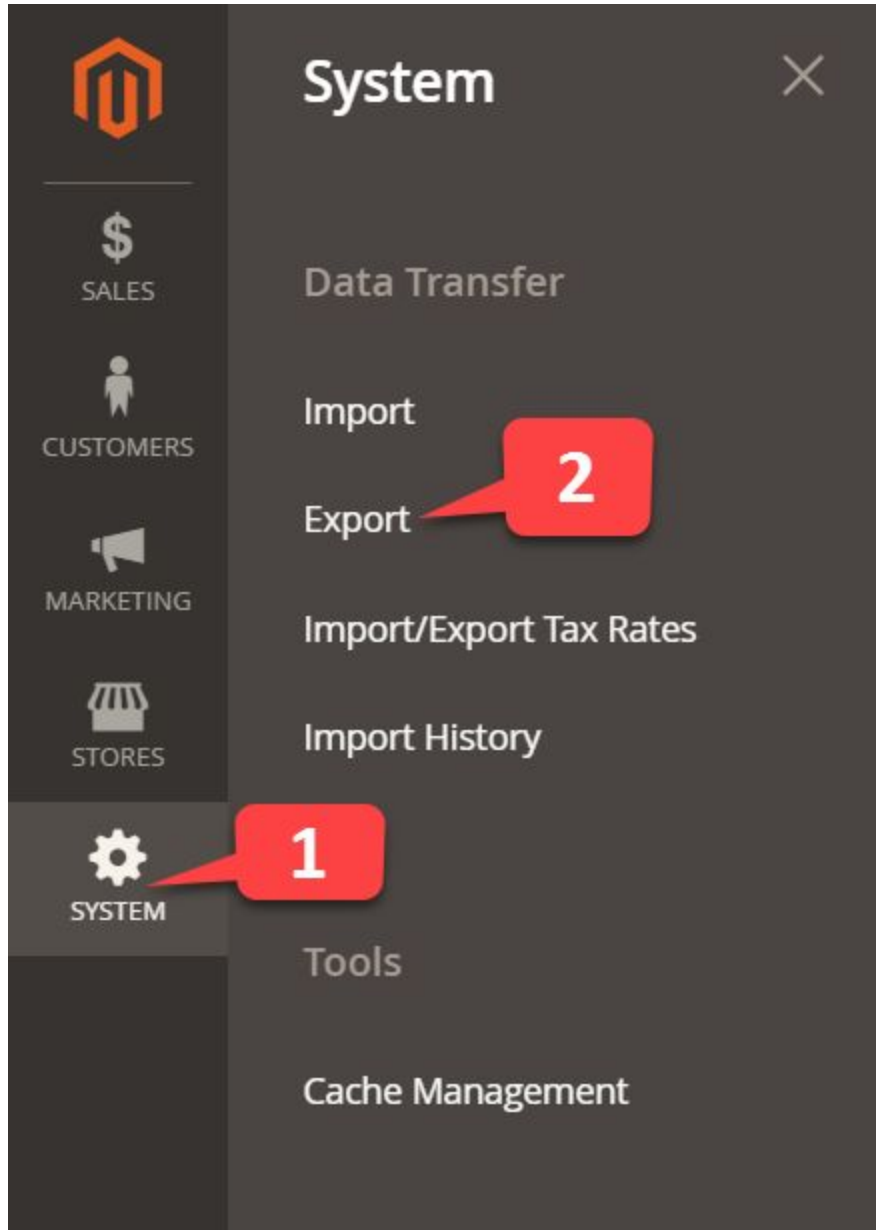
- As a result, we get an excel file with custom customer attributes:



	A	B	C	D	E
1	ID	Name	Email	Your company name?	Your position in the company?
2	1	Jane Dong	roni_cost@example.com	Magezon	Marketer
3	2	Lioz Nguyen	hoand@demo.com	Magezon	Developer
4	3	Heidi Hoang	honght@magezon.com	Magezon	Maketer
5	4	HÃ²a Duy	ndh.duyhoa.97@gmail.com	Magezon	Developer
6	5	Nga Dong	ngadt@magezon.com	Magezon	Marketer
7	6	HÃ²a Duy	hoand@magezon.com	Magezon	Developer
8	7	Jane Dong	ngadt03021995@gmail.com	Magezon	Marketing
9	8	HieuNT Magezon	hieunt@magezon.com	Magezon	Developer

## 5.1.2. Export from System

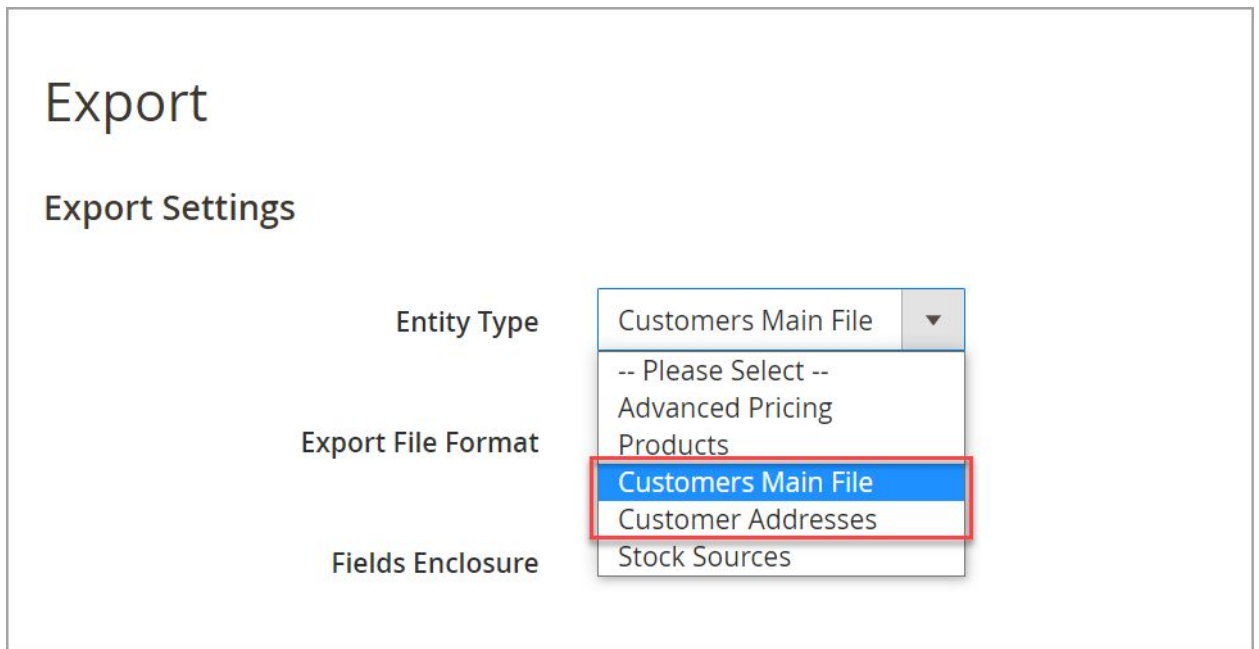
**Step 1:** Navigate to **System** → **Data Transfer** → **Export**.



**Step 2:** At **Entity Type**, choose:

- **Customer Main File** if you want to export customer attribute data.
- **Customer Address** if you want to export customer address attribute data.

This case, we choose the **Customer Main File**.



**Step 3:** In the **Exclude** column, exclude the wanted attributes by ticking the box.

Entity Attributes

Search [Reset Filter](#)

49 records found

Exclude	Attribute Label	Attribute Code	Filter
<input type="checkbox"/>	Avatar	avatar	<input type="text"/>
<input type="checkbox"/>	Choose what Magezon extensions you like most	choose_what_magezon_extensions	-- Not Selected --
<input type="checkbox"/>	Is Confirmed	confirmation	<input type="text"/>

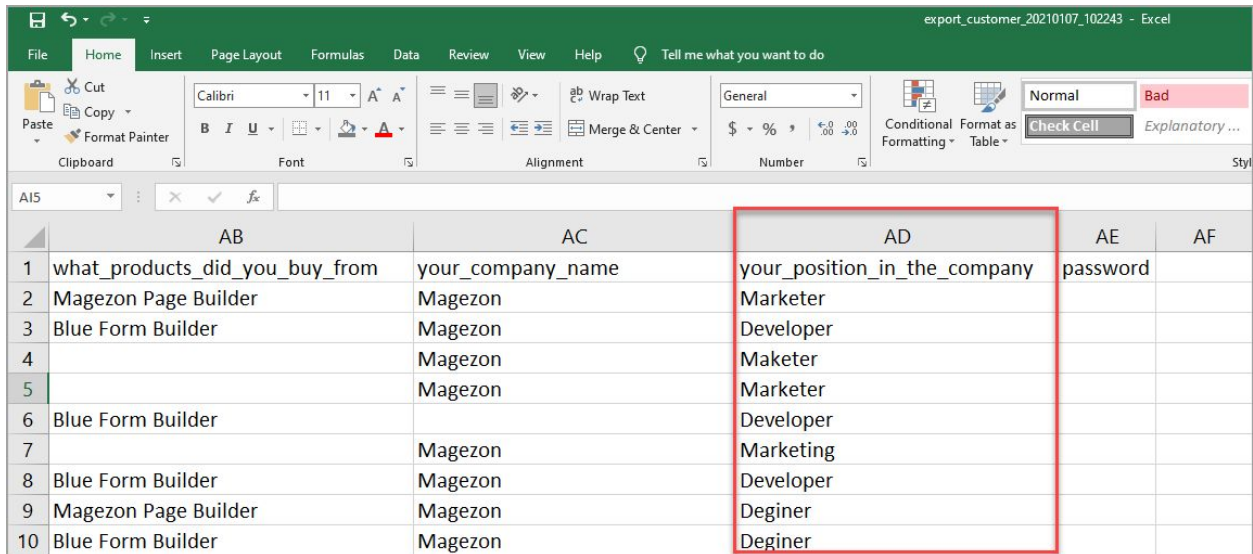
**Step 4:** Hit the **Continue** button on the bottom. Then choose the file you have just exported. Click **Download** to export the customer attribute data.

9 records found

20 per page 1 of 1

File name	Action
customer_20210107_083451.csv	Select Download Delete
customer_20210107_092523.csv	Select
customer_20210107_091203.csv	Select
customer_20201214_085636.csv	Select
customer_address_20201218_094513.csv	Select
customer_20201228_033203.csv	Select

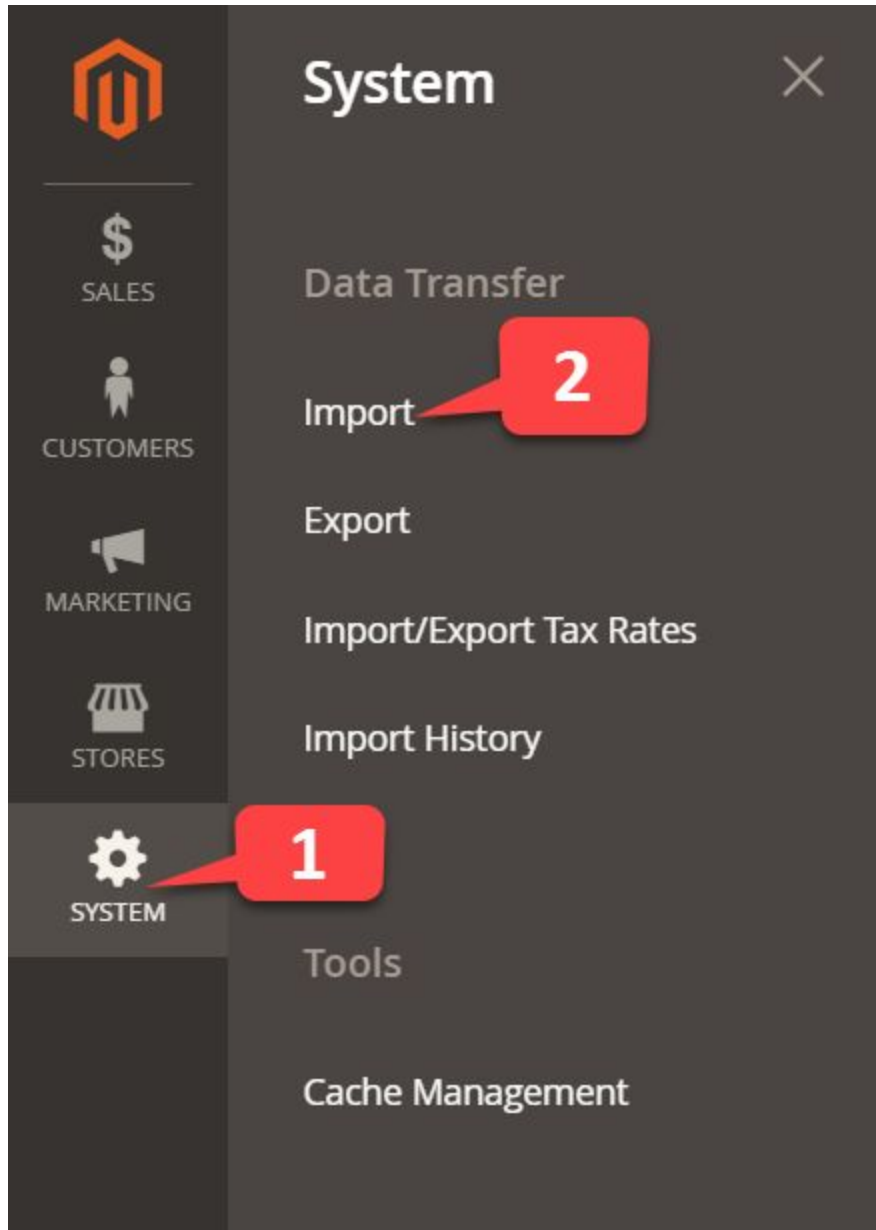
And below is the excel file with the newly-created customer attribute:



	AB	AC	AD	AE	AF
1	what_products_did_you_buy_from	your_company_name	your_position_in_the_company	password	
2	Magezon Page Builder	Magezon	Marketer		
3	Blue Form Builder	Magezon	Developer		
4		Magezon	Maketer		
5		Magezon	Marketer		
6	Blue Form Builder		Developer		
7		Magezon	Marketing		
8	Blue Form Builder	Magezon	Developer		
9	Magezon Page Builder	Magezon	Deginer		
10	Blue Form Builder	Magezon	Deginer		

## 5.2. Import Data with Custom Attributes

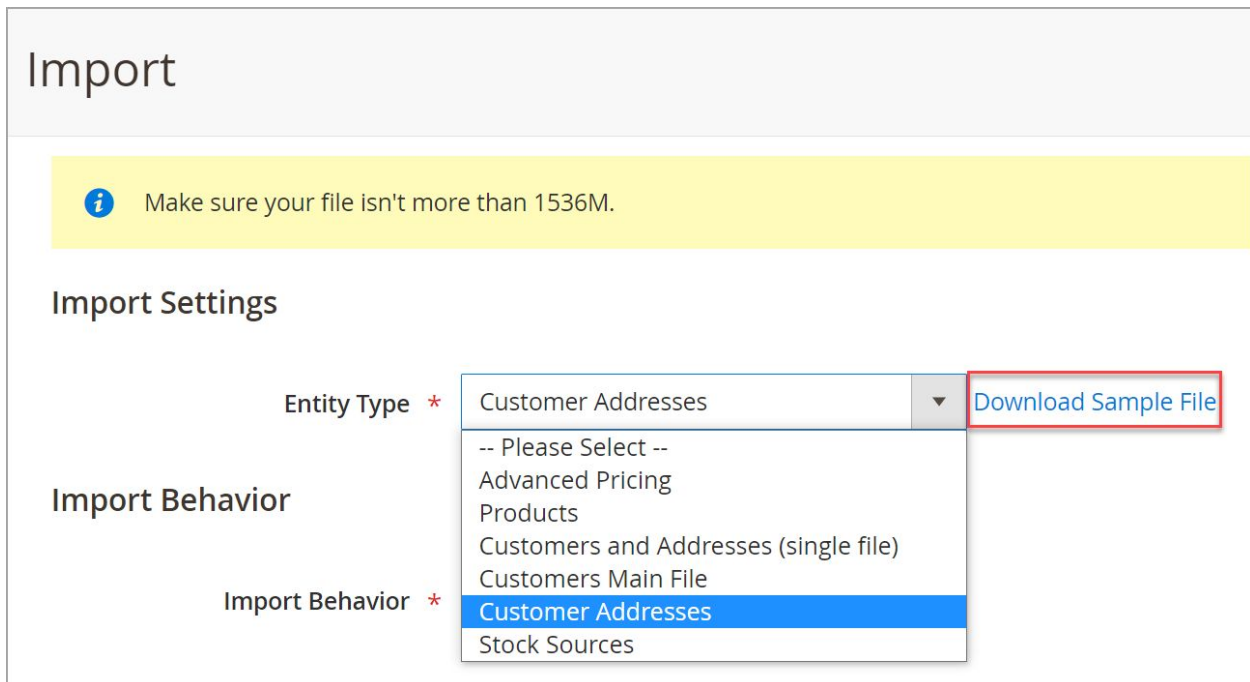
**Step 1:** From the admin sidebar, go to **System** → **Import**.



**Step 2:** At **Entity Type**, choose:

- **Customer Main File** if you want to import customer data with created customer attributes.
- **Customer Address** if you want to import customer address data with created customer address attributes.
- **Customers and Addresses (single file)** if you want to import customer and customer address attribute data.

This case, we choose the **Customer Addresses**.



**Import**

*i* Make sure your file isn't more than 1536M.

**Import Settings**

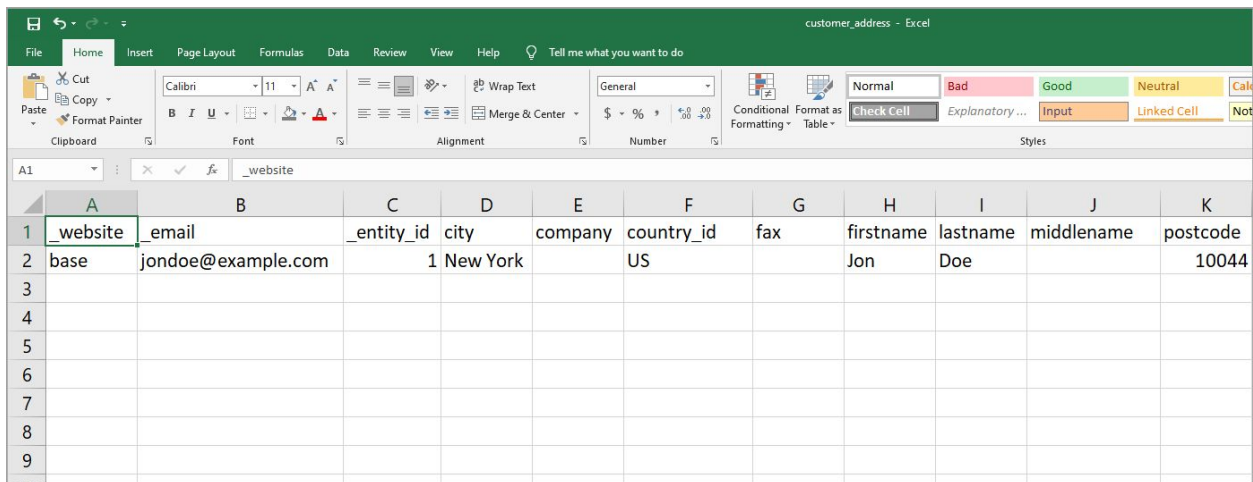
Entity Type \* Customer Addresses [Download Sample File](#)

**Import Behavior**

Import Behavior \* -- Please Select --  
Advanced Pricing  
Products  
Customers and Addresses (single file)  
Customers Main File  
**Customer Addresses**  
Stock Sources

Pay attention to **Download Sample File**. You should first download the sample so that you can check whether the sample file's structure (especially column headings) matches the system one.

Plus, make sure that the import file size does not exceed the limit (which is shown right on the top left of the section). Below are the sample file:



	A	B	C	D	E	F	G	H	I	J	K
1	_website	_email	_entity_id	city	company	country_id	fax	firstname	lastname	middlename	postcode
2	base	jondoe@example.com	1	New York		US		Jon	Doe		10044
3											
4											
5											
6											
7											
8											
9											

**Step 3:** At **Import Behavior**, choose **Add/Update Complex Data** to add new data to the existing data.

## Import Behavior

Import Behavior \* Add/Update Complex Data ▼ ?

Validation Strategy \* 
 -- Please Select --  
Add/Update Complex Data  
 Delete Entities  
 Custom Action



**Step 4:** At **Select file to import**, click on **Choose File** button to upload data file from your desktop/laptop.

## Import

Empty attribute value constant \*

Fields enclosure

### File to Import

Select File to Import \* Choose File No file chosen

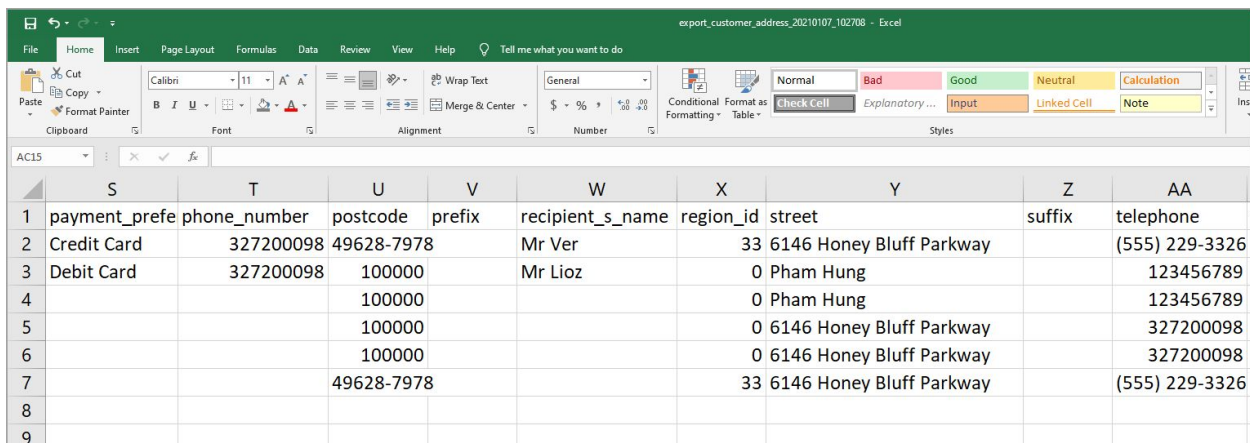
File must be saved in UTF-8 encoding for proper import

Images File Directory

For Type "Local Server" use relative path to <Magento root directory>/var/import/images, e.g. *product\_images, import\_images/batch1*.

For example, in case *product\_images*, files should be placed into <Magento root directory>/var/import/images/product\_images folder.


And here is the chosen file with customer address attributes:





	S	T	U	V	W	X	Y	Z	AA
1	payment_prefer	phone_number	postcode	prefix	recipient_s_name	region_id	street	suffix	telephone
2	Credit Card	327200098	49628-7978		Mr Ver	33	6146 Honey Bluff Parkway		(555) 229-3326
3	Debit Card	327200098	100000		Mr Lioz	0	Pham Hung		123456789
4			100000			0	Pham Hung		123456789
5			100000			0	6146 Honey Bluff Parkway		327200098
6			100000			0	6146 Honey Bluff Parkway		327200098
7			49628-7978			33	6146 Honey Bluff Parkway		(555) 229-3326
8									
9									

**Step 5:** Hit **Check Data** after uploading the file. And here is the validation results:

Validation Results

 Checked rows: 5, checked entities: 5, invalid rows: 0, total errors: 0


 File is valid! To start import process press "Import" button 


No error so you can then click on Import to import the data. And here is the import status:

# Import

---

Status

 Created: 0, Updated: 5, Deleted: 0

 Import successfully done

Import successfully done!

In case there is any problem with data, the error message will be shown. You just need to correct the invalid data and re-upload the file.

## VI) Support

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

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