

Registration Fields Manager extension for Magento2

User Guide

version 1.0



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1. Introduction

The document is a User Guide for extension **Registration Fields Manager** created for Magento2 websites. It describes the extension functionality and provides some tips for a quick start.

The purpose of the [Registration Fields Manager extension for Magento 2 \(https://www.itoris.com/magento-2-registration-fields-manager-customer-attributes.html\)](https://www.itoris.com/magento-2-registration-fields-manager-customer-attributes.html) is to allow to create more customers' attributes. Admin can easily add more fields on the registration form, group fields into sections on a long form, translate them for different store views, reorder existing fields.

Using Registration Fields Manager customer can edit the additional data within user's profile. Admin can also edit it. What is more, admin can allow customer to choose group on the registration form.

The extension allows managing all the information in backend, adding system fields or creating new custom fields. The system fields are: Email, Name Prefix, First Name, Last Name, Middle Name/Initial, Suffix, Date of Birth, Tax/VAT Number, Gender, Customer Group. There are also the billing and shipping address fields: Company, Telephone, Street Address, City, Country, State/Province, Zip/Postal Code, Fax. You can add as many fields as you need to extend customer profile.

2. Installation

2.1. System Requirements

The extension requires Magento 2.x

2.2. Installation

The extension is provided as a .zip archive with the source code and the installation instructions.

Unpack the source code into **/app/code/Itoris/Itoris_RegFields/** folder on your server. And run the following commands in the SSH console:

```
php bin/magento module:enable --clear-static-content Itoris_RegFields
php bin/magento setup:upgrade
```

Then log into Magento backend and flush cache in **System -> Cache Management -> Flush Magento Cache**

If you experience any issues with the extension installation please contact us here -

<https://www.itoris.com/contact-us.html>

2.3. License

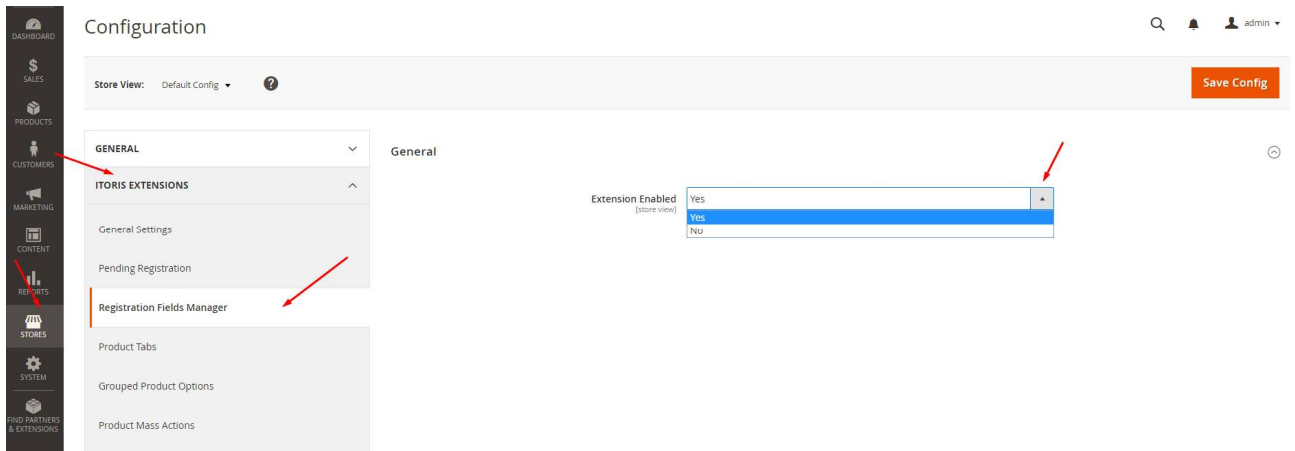
The extension has full open source code. One license/purchase can be used on a single production Magento2 website and its development instances. The extension can be customized for the license owner needs. Redistribution of the extension or its parts is not allowed. Please read more details here -

<https://www.itoris.com/magento-extensions-license.html>

3. How to Use

3.1. Enable/Disable Extension

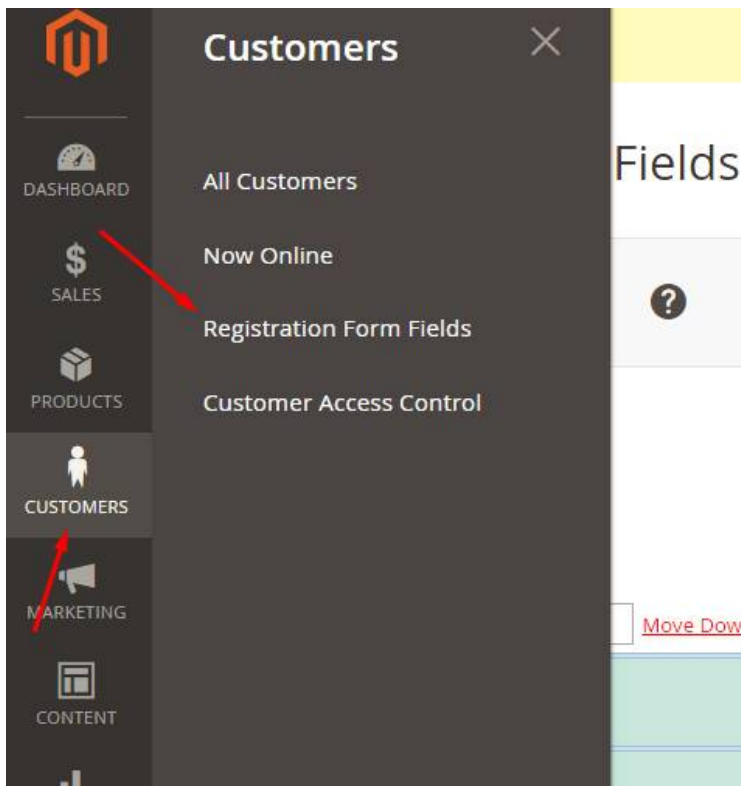
You can enable or disable the extension following **STORES -> Settings -> Configuration -> ITORIS EXTENSIONS-> Registration Fields Manager -> Extension Enabled - Yes/No**



3.2. Configuring Registration Form

3.2.1. The List of Default Fields

You can manage system fields and create new ones for all customers together following **CUSTOMERS -> Customers -> Registration Form Fields**.



Once the extension has been installed the following 5 fields named "Personal Information" and "Login Information" will be created automatically:

- First name
- Last name
- Email address
- Password
- Confirm Password

You can edit registration fields separately to each store view. In this case, please select the store view in the configuration scope at top of the page. For example, to translate fields' labels for different store views.

Click the "Add New Section" button to create a new section or click button "Reset Form to Default" to discard all changes and reset the form to defaults. At the top of each section you can choose in "Columns" and "Rows" a necessary number of columns and rows for your section.

Sections can be reordered on the page. Click links "Move down" or "Move up".

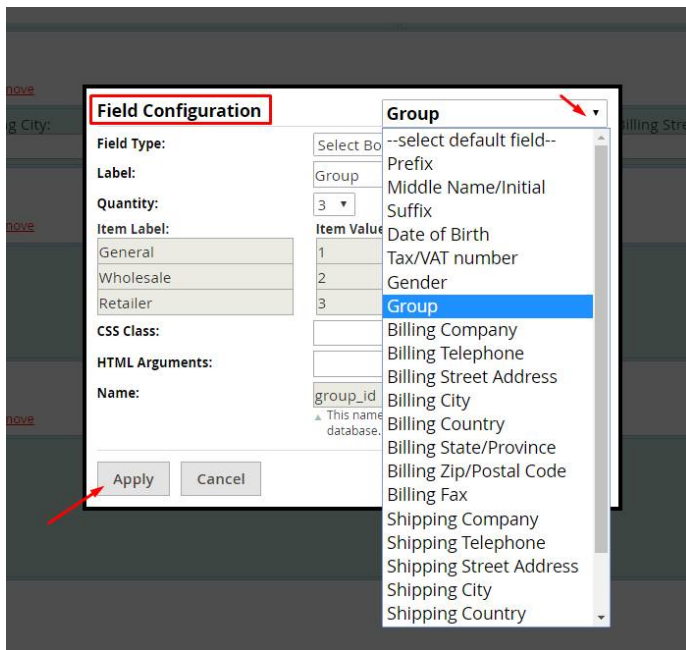
To remove a section move all its fields to another section first.

Click button "Save Form" to save the form with all sections and fields.

3.2.2. Add New Field

Click on an empty cell to create a new field.

In appeared popup you can see the following properties: selecting default field, Field Type, Label, Required, Validation, Default Value, CSS Class, HTML Arguments and Name.



Click the "select default field" dropdown and the following system fields are available from the list:

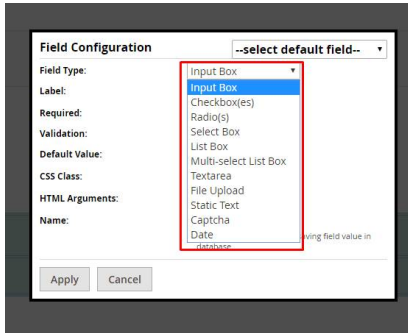
- Prefix
- Middle Name/Initial
- Suffix
- Date of Birth
- Tax/Vat Number
- Gender
- Group
- Billing Company
- Billing Telephone
- Billing Street Address
- Billing City
- Billing Country
- Billing State/Province
- Billing Zip/Postal Code
- Billing Fax
- Shipping Company
- Shipping Telephone
- Shipping Street Address
- Shipping City
- Shipping Country
- Shipping State/Province
- Shipping Zip/Postal Code
- Shipping Fax

Once field has been selected, click "Apply" to save the field or "Cancel" to go back.

3.3 Element Editor

3.3.1 Field Type

Using the extension you can create new custom fields. Select dropdown "Field Type" to choose a template. Fill in the rest of options. Then click button "Apply" to save, "Cancel" to go back or "Remove" to delete the field.



Field type – a template of field. Click the dropdown to choose one of the types:

- **Input Box** – text field, where the customer inputs some information.

Section Label: [Move Up](#) [Remove](#)

How old are you?:

- **Checkbox(es)** – allows the user to select multiple options.

Section Label: [Move Up](#) [Remove](#)

What is hobby?:
☐ Music
☐ Sport
☐ Art
☐ Cinema
☐ Camping
☐ Games

- **Radio(s)** – allows the user to select one of the options.

Section Label: [Move Up](#) [Remove](#)

Are you married?:
☐ Yes
☐ No

- **Select Box** – the user can select a single option in the list.

Section Label: [Move Up](#) [Remove](#)

Number of family members:

- **List Box** - allows the user to select one or more options from a list.

Section Label: [Move Up](#) [Remove](#)

What age category do you fit into?:

▲

 ▼

- **Multi-select List Box** – is the same as "List Box". But the user can select multiple options.
- **Textarea** – allows the user to enter the multi-line text.

Section Label: [Move Up](#) [Remove](#)

What is your favorite color?:

- **File Upload** – allows to attach a file.

Section Label: [Move Up](#) [Remove](#)

Please, choose the avatar:

No file chosen

File Extensions Allowed: png, jpg, jpeg, gif

Max file size in bytes: 1048576

- **Static Text** –allows admin to add some static information.

Section Label: [Move Up](#) [Remove](#)

The purpose of the Registration Fields Manager extension for Magento 2 is to allow to create more customers attributes. Admin or customer can easily add more fields on registration form, group fields into sections on a long form, translate them for different store views, reorder existing fields.

- **Captcha** - adds the bot protection. There are 3 types of captcha. You can choose one of them in the "Field Configuration" form.



Section Label: [Move Up](#) [Remove](#)

Enter Security Code:



Please, enter the text shown in the image into the field below

- **Date** – allows the user to select a date.

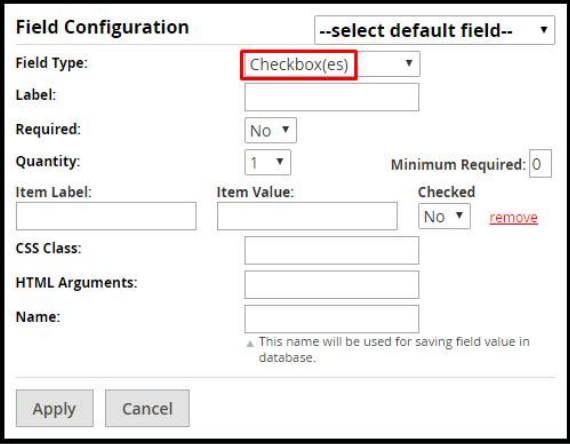
Section Label: [Move Up](#) [Remove](#)

Date of Birth:

3.3.2 Properties of Input Box

- **Label** – enter the title of your field. The title is visible on the registration form.
- **Required** – choose "Yes" to make the field required or choose "No" to leave the field optional.
- **Validation** – choose the validation rule. The following validation rules are available:
 - Email
 - Name
 - Number
 - Money
 - Phone
 - Date
 - Zip Code
- **Default Value** – enter the value that would be visible in the field by default.
- **CSS Class** – if you want to apply your customer CSS class enter it here.
- **HTML Arguments** – add your own arguments to HTML tag of the field.
- **Name** – is a required property. Name should be unique, alpha-numeric with no spaces and special symbols, in lower case preferably.

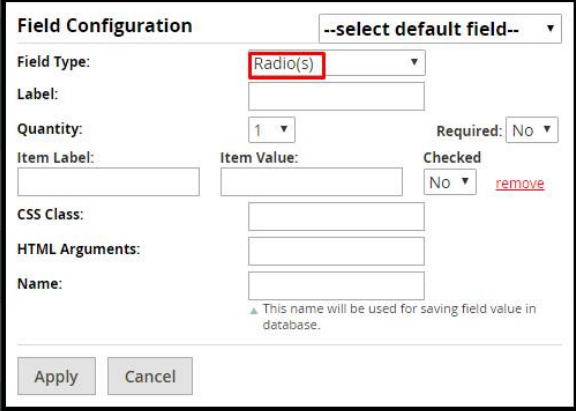
3.3.3 Properties of Checkbox(es)



The screenshot shows a 'Field Configuration' dialog box. At the top, there is a dropdown menu labeled '--select default field--'. Below it, the 'Field Type:' is set to 'Checkbox(es)'. The 'Label:' field is empty. The 'Required:' dropdown is set to 'No'. The 'Quantity:' dropdown is set to '1', and the 'Minimum Required:' field is set to '0'. The 'Item Label:' field is empty. The 'Item Value:' field is empty. The 'Checked:' dropdown is set to 'No', and there is a 'remove' link next to it. The 'CSS Class:' field is empty. The 'HTML Arguments:' field is empty. The 'Name:' field is empty. At the bottom, there are 'Apply' and 'Cancel' buttons. A small note at the bottom of the dialog states: 'This name will be used for saving field value in database.'

- **Label** – see topic 3.3.2.
- **Required** – see topic 3.3.2.
- **Quantity** – choose how many checkboxes you want to add.
- **Minimum Required** – it should be equal or less than quality of checkboxes.
- **Item Label** – enter the title of the field.
- **Item Value** - is the base value of the form of the item.
- **Checked** – choose "Yes" to mark the checkbox or "No" to leave the checkboxes empty. Select as many items as you wish. You can remove the line by clicking the "remove" link.
- **CSS Class** – see topic 3.3.2.
- **HTML Arguments** – see topic 3.3.2.
- **Name** – see topic 3.3.2.

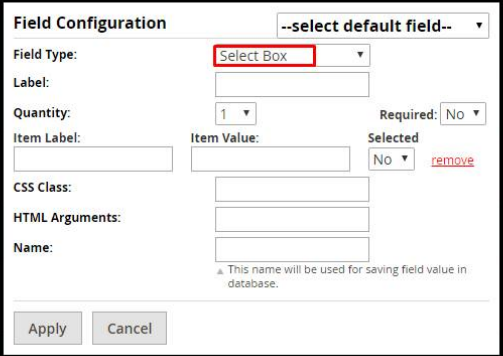
3.3.4 Properties of Radio(s)



The screenshot shows a 'Field Configuration' dialog box with a dropdown menu set to 'Radio(s)'. The dialog includes fields for Label, Quantity (set to 1), Required (set to No), Item Label, Item Value, Checked (set to No), CSS Class, HTML Arguments, and Name. A 'remove' link is next to the Checked field. A note at the bottom states: 'This name will be used for saving field value in database.' The 'Apply' and 'Cancel' buttons are at the bottom.

- **Label** – see topic 3.3.2.
- **Quantity** – see topic 3.3.3.
- **Required** – see topic 3.3.2.
- **Item Label** – see topic 3.3.3.
- **Item Value** - see topic 3.3.3.
- **Checked** – only one item can be checked at the same time.
- **CSS Class** – see topic 3.3.2.
- **HTML Arguments** – see topic 3.3.2.
- **Name** – see topic 3.3.2.

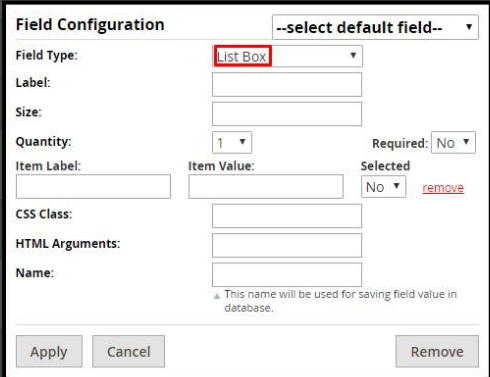
3.3.5 Properties of Select Box



The screenshot shows a 'Field Configuration' dialog box with a dropdown menu set to 'Select Box'. The dialog includes fields for Label, Quantity (set to 1), Required (set to No), Item Label, Item Value, Selected (set to No), CSS Class, HTML Arguments, and Name. A 'remove' link is next to the Selected field. A note at the bottom states: 'This name will be used for saving field value in database.' The 'Apply' and 'Cancel' buttons are at the bottom.

- **Label** – see topic 3.3.2.
- **Quantity** – see topic 3.3.3.
- **Required** – see topic 3.3.2.
- **Item Label** – see topic 3.3.3.
- **Item Value** - see topic 3.3.3.
- **Selected** – only one item can be checked at the same time.
- **CSS Class** – see topic 3.3.2.
- **HTML Arguments** – see topic 3.3.2.
- **Name** – see topic 3.3.2.

3.3.6 Properties of List Box

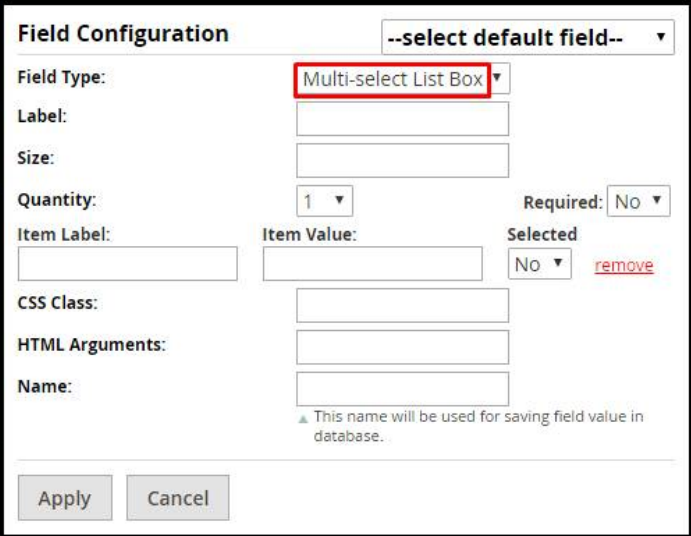


The screenshot shows a 'Field Configuration' dialog box. At the top, there is a dropdown menu labeled '--select default field--'. Below this, the 'Field Type' is set to 'List Box', which is highlighted with a red box. Other fields include 'Label', 'Size', 'Quantity' (set to 1), 'Item Label', 'Item Value', 'CSS Class', 'HTML Arguments', and 'Name'. There are also checkboxes for 'Required' (set to No) and 'Selected' (set to No), with a 'remove' link next to the 'Selected' checkbox. At the bottom, there are 'Apply', 'Cancel', and 'Remove' buttons. A small note at the bottom right states: 'This name will be used for saving field value in database.'

- **Label** – see topic 3.3.2.
- **Size** – define the scope of the line.
- **Quantity** – see topic 3.3.3.
- **Required** – see topic 3.3.2.
- **Item Label** – see topic 3.3.3.
- **Item Value** - see topic 3.3.3.
- **Selected** – see topic 3.3.5.
- **CSS Class** – see topic 3.3.2.

- **HTML Arguments** – see topic 3.3.2.
- **Name** – see topic 3.3.2.

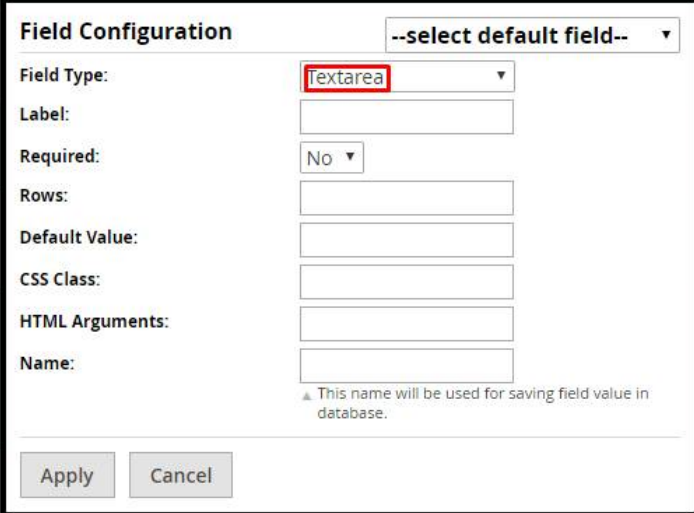
3.3.7 Properties of Multi-select List Box



The screenshot shows a 'Field Configuration' dialog box. At the top right is a dropdown menu labeled '--select default field--'. The 'Field Type:' dropdown is set to 'Multi-select List Box' and is highlighted with a red rectangle. Below this are input fields for 'Label:', 'Size:', 'Quantity:' (set to 1), 'Item Label:', 'Item Value:', 'CSS Class:', 'HTML Arguments:', and 'Name:'. To the right of the 'Quantity' field is a 'Required:' dropdown set to 'No'. Below the 'Item Value' field is a 'Selected' dropdown set to 'No' with a red 'remove' link next to it. A small note at the bottom states: 'This name will be used for saving field value in database.' At the bottom of the dialog are 'Apply' and 'Cancel' buttons.

- **Label** – see topic 3.3.2.
- **Size** – see topic 3.3.6.
- **Quantity** – see topic 3.3.3.
- **Required** – see topic 3.3.2.
- **Item Label** – see topic 3.3.3.
- **Item Value** - see topic 3.3.3.
- **Selected** – choose as many items as you wish. You can also remove the option clicking "Remove".
- **CSS Class** – see topic 3.3.2.
- **HTML Arguments** – see topic 3.3.2.
- **Name** – see topic 3.3.2.

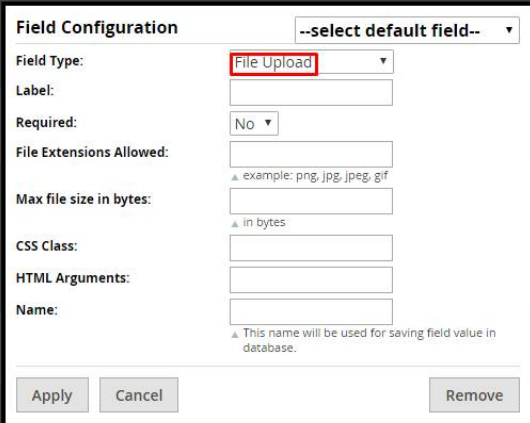
3.3.8 Properties of Textarea



The screenshot shows a 'Field Configuration' dialog box. At the top right is a dropdown menu labeled '--select default field--'. The 'Field Type:' dropdown is set to 'Textarea' and is highlighted with a red box. Below it are input fields for 'Label:', 'Required:' (set to 'No'), 'Rows:', 'Default Value:', 'CSS Class:', 'HTML Arguments:', and 'Name:'. A small warning icon and text at the bottom of the 'Name' field state: 'This name will be used for saving field value in database.' At the bottom of the dialog are 'Apply' and 'Cancel' buttons.

- **Label** – see topic 3.3.2.
- **Required** – see topic 3.3.2.
- **Rows** – choose the scope of the text.
- **Default Value** – see topic 3.3.2.
- **CSS Class** – see topic 3.3.2.
- **HTML Arguments** – see topic 3.3.2.
- **Name** – see topic 3.3.2.

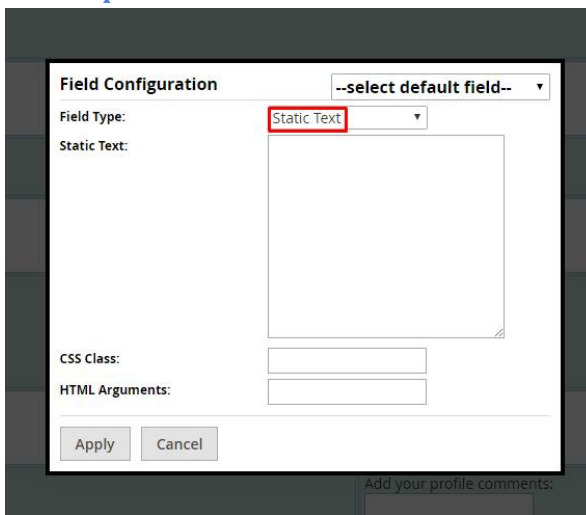
3.3.9 Properties of File Upload



The screenshot shows a 'Field Configuration' dialog box. At the top right is a dropdown menu labeled '--select default field--'. The 'Field Type:' dropdown is set to 'File Upload' and is highlighted with a red box. Below it are input fields for 'Label:', 'Required:' (set to 'No'), 'File Extensions Allowed:' (with a hint 'example: png, jpg, jpeg, gif'), 'Max file size in bytes:' (with a hint 'in bytes'), 'CSS Class:', 'HTML Arguments:', and 'Name:'. A small warning icon and text at the bottom of the 'Name' field state: 'This name will be used for saving field value in database.' At the bottom of the dialog are 'Apply', 'Cancel', and 'Remove' buttons.

- **Label** – see topic 3.3.2.
- **Required** – see topic 3.3.2.
- **File Extensions Allowed** – set the allowed extensions for files. For instance, png, jpg, jpeg, gif.
- **Max file size in bytes** – enter the max file size in bytes.
- **CSS Class** – see topic 3.3.2.
- **HTML Arguments** – see topic 3.3.2.
- **Name** – see topic 3.3.2.

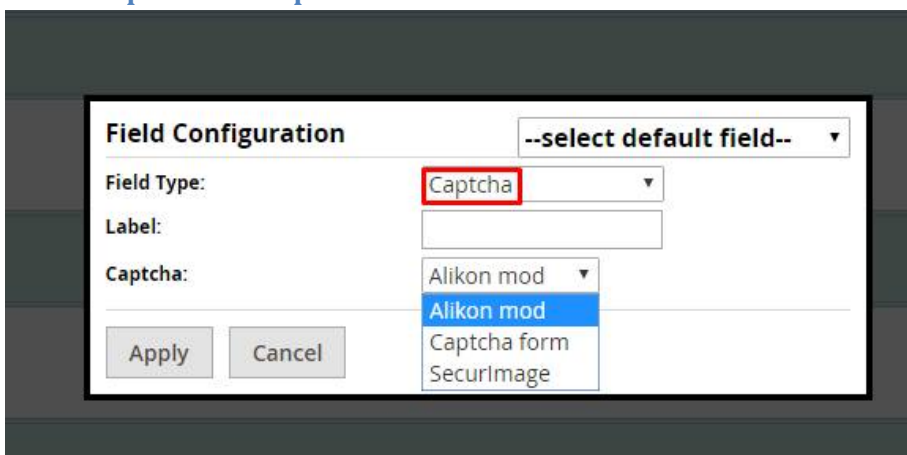
3.4 Properties of Static Text



The screenshot shows a 'Field Configuration' dialog box. At the top right is a dropdown menu labeled '--select default field--'. Below it, the 'Field Type:' dropdown is set to 'Static Text' and is highlighted with a red rectangle. To the right of 'Field Type:' is a large text area labeled 'Static Text:'. Below the text area are two input fields: 'CSS Class:' and 'HTML Arguments:'. At the bottom left are 'Apply' and 'Cancel' buttons. The dialog is overlaid on a dark background with a faint 'Add your profile comments.' text at the bottom.

- **Static Text** – enter the text which the customer will see while logging in.
- **CSS Class** – see topic 3.3.2.
- **HTML Arguments** – see topic 3.3.2.

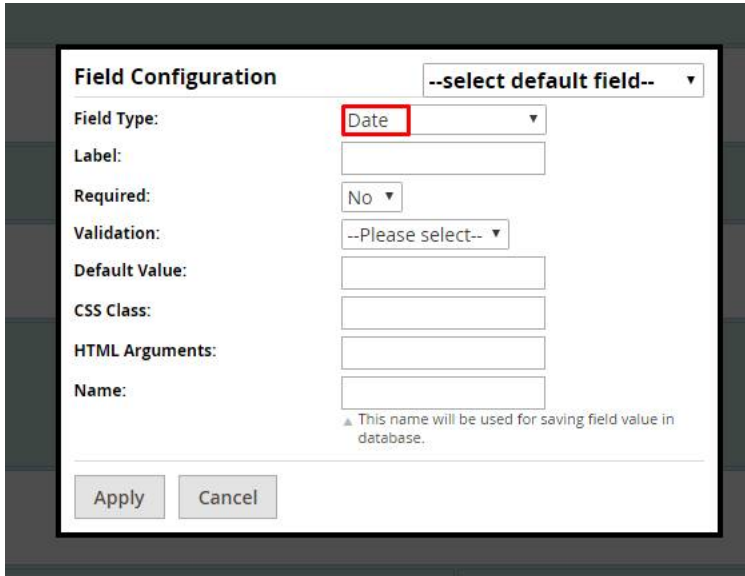
3.4.1 Properties of Captcha



The screenshot shows a 'Field Configuration' dialog box. At the top right is a dropdown menu labeled '--select default field--'. Below it, the 'Field Type:' dropdown is set to 'Captcha' and is highlighted with a red rectangle. To the right of 'Field Type:' is a text input field labeled 'Label:'. Below the 'Label:' field is a dropdown menu labeled 'Captcha:' with a list of options: 'Alikon mod', 'Alikon mod' (highlighted in blue), 'Captcha form', and 'SecurImage'. At the bottom left are 'Apply' and 'Cancel' buttons. The dialog is overlaid on a dark background.

- **Label** – see topic 3.3.2.
- **Captcha** – choose one of 3 captcha types available.

3.4.2 Properties of Date



The screenshot shows a 'Field Configuration' dialog box. At the top right is a dropdown menu labeled '--select default field--'. Below this, the 'Field Type:' dropdown is set to 'Date' and is highlighted with a red rectangle. Other fields include 'Label:', 'Required:' (set to 'No'), 'Validation:' (set to '--Please select--'), 'Default Value:', 'CSS Class:', 'HTML Arguments:', and 'Name:'. A small warning icon and text at the bottom of the dialog state: 'This name will be used for saving field value in database.' At the bottom of the dialog are 'Apply' and 'Cancel' buttons.

- **Label** – see topic 3.3.2.
- **Required** – see topic 3.3.2.
- **Validation** – see topic 3.3.2.
- **Default Value** – see topic 3.3.2.
- **CSS Class** – see topic 3.3.2.
- **HTML Arguments** – see topic 3.3.2.
- **Name** – see topic 3.3.2.

3.4 Registration Fields on Frontend

Here is how options will be displayed on Frontend when admin creates more fields. There are required and optional fields. Required fields are highlighted with the asterisk (*).

What's New Women Men Gear Sale

Create an Account

Personal Information

First Name * Last Name * Email Address *

☐ Sign Up for Newsletter

General Information

Group * Gender * Date of Birth *

Login Information

Password * Confirm Password *

Billing Address

Billing Country Billing City Billing Street Address

Bot Protection

Please, enter security code *

Please, enter the text shown in the image into the field below:

Other Details

Add your profile comments:

What is your favourite color:

3.5 Data Editing

3.5.1 Editing Customer Data

The extension allows to edit the additional data within the customer's profile.

After registration the customer can edit the profile. On the Dashboard the user can click links "Edit" to change the information, "Change Password" and "Edit address".

LUMA

Search entire store here...

What's New Women Men Gear Sale

Account Dashboard

Account Information

Address Book

My Orders

My Downloadable Products

Newsletter Subscriptions

My Credit Cards

My Product Reviews

Billing Agreements

My Wish List

Account Information

Contact Information

Adam Horan

adamhoran@gmail.com

Edit | Change Password

Address Book

Manage Addresses

Default Billing Address

Adam Horan

458 767 4579

New York, ---

United States

T: ---

Edit Address

Newsletters

You don't subscribe to our newsletter.

Edit

Default Shipping Address

You have not set a default shipping address.

Edit Address

Compare Products

Website: <http://www.itoris.com>
Email: sales@itoris.com

Page | 17

Or the user can change the names or email following **Account Dashboard -> Account Information**

After necessary changes the user clicks button "Save" to save settings.

All the custom fields are listed in the "Other Information" section and the customer can edit it.

LUMA

Search entire store here...

What's New Women Men Gear Sale

Account Dashboard
Account Information
Address Book
My Orders
My Downloadable Products
Newsletter Subscriptions
My Credit Cards
My Product Reviews
Billing Agreements
My Wish List

Account Information

First Name * Adam
Last Name * Horan
Email * adamhoran@gmail.com

☐ Change Password

Other Information

☐ Sign Up for Newsletter

What is your favourite color
--Please select--
Green
Yellow
Blue
Red

Add your profile comments

Compare Products

Save

3.5.2 Editing Admin Data

Using the extension Admin can also edit fields in the customer's account following **CUSTOMERS -> Customers -> All Customers -> {some customer} -> CUSTOMER INFORMATION -> Custom Registration Fields**

Adam Horan

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

CUSTOMER INFORMATION

Customer View
Account Information
Custom Registration Fields
Addresses
Account activation
Orders
Billing Agreements

Additional Registration Information

☐ Sign Up for Newsletter

What is your favourite color
--Please select--
Green
Yellow
Blue
Red

Add your profile comments

Finally, click button "Save Customer" to save settings.