

[Customer approval - Magento 2](#)

[USER MANUAL](#)

Supported Version: 2.0, 2.1, 2.2, 2.3



Performant Magento Extensions

Table Of Contents

Preface	3
Installation.....	4
Option 1: Magento 2 install extension using COMMAND LINE	4
Option 2: Magento 2 install extension manually	5
Backend Example	6
Extension configuration.....	6
Frontend Example.....	11

Preface:

- Customer Approval extension allows you to restrict customers from logging in to your website without prior approval. This is particularly helpful when you want to verify the customer's details before giving them access to the website. It can also be used to force the customers to login before they can make a purchase by disabling Guest Checkout which is a standard feature in Magento.
- The extension allows you to redirect customers to any URL internal or external. It also allows you to configure the extension for your store to send email notifications to the admin upon account creation and to the customer upon approval and rejection of the customer application. Email templates for admin notification, customer approval and rejection come with the extension. Custom emails templates can be created using the Transactional Emails feature in Magento. The extension is configurable at the store view level allowing you to have different settings for different stores in your multi store setup.

Installation:

There are two ways of installing extension in magento2.

- 1) Using COMMAND LINE.
- 2) Manually install extension.

Option 1: Magento 2 install extension using COMMAND LINE (Recommended).

Follow below steps to install extension from the command line.

Step 1: Download the extension and unzip it.

Step 2: Upload it to code directory in your magento installation's app directory.
If code directory does not exists then create.

Step 3: Disable the cache under System → Cache Management.

Step 4: Enter the following at the command line:
php bin/magento setup:upgrade
php bin/magento setup:static-content:deploy

Step 5: Once you complete above steps log out and log in back to the admin panel and switch to Stores → Configuration → Mageants → Customer approval. The module will be displayed in the admin panel.

Option 2: Magento 2 install extension manually.

Step 1: Download the extension and unzip it.

Step 2: Upload it to code directory in your magento installation's app directory. If code directory does not exist then create.

Step 3: Disable the cache under System → Cache Management Edit app/etc/config.php file and add one line code: 'Mageants_Customer approval' → 1

Step 4: Disable the cache under System → Cache Management

Step 5: Once you complete above steps log out and log in back to the admin panel and switch to Stores → Configuration → Mageants → Customer approval, the module will be displayed in the admin panel.

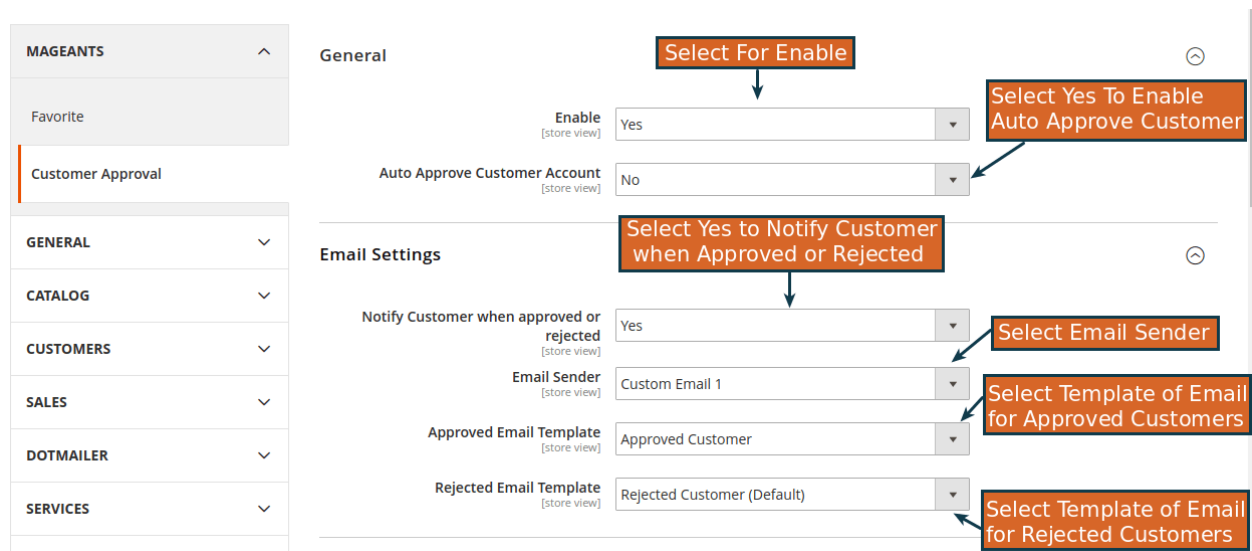
Backend example

After Installation of Extension login to magento admin panel to set configuration of the extension.

As per below screen shot you can set all the settings here.

Extension Configuration

You can find configuration at Stores → Configuration → Mageants → Customer Approval.



General

Enabled: Select Yes/No to Enable/Disable the extension respectively. This can be configured at a store view level if you have a multi store setup.

Auto Approve Customer Account: Select Yes approve customer account upon registration. Accounts approved can be rejected in the admin.

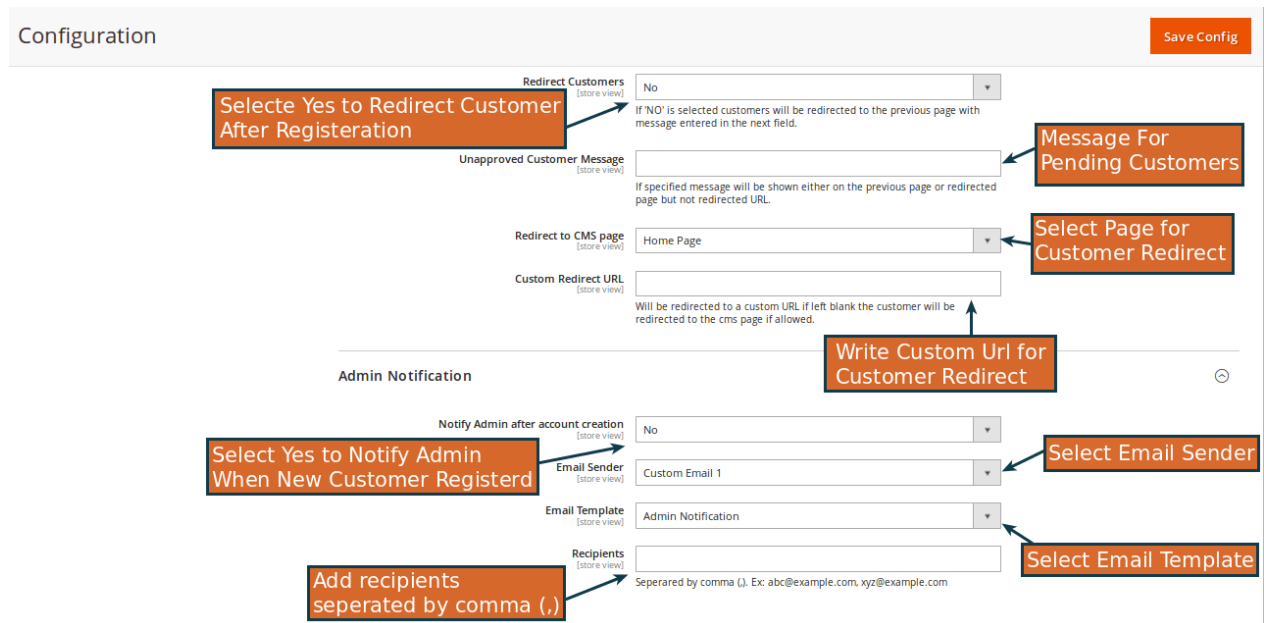
EMAIL SETTINGS

Notify Customer when approved or rejected: Select Yes to notify the customer when their account is approved or rejected.

Email Sender: Select the email sender you wish to send the emails to the customer. Magento email senders can be configured by going to Stores → Configuration → Store → Store Email Addresses, specify the contact name and email address for the contacts.

Approved Email Template: Select the email template to use when customer is notified that their account has been approved. A default email comes with our extension package. You can also override the email by creating a transactional email of your own by going to System → Transactional Emails, creating your own email template by selecting the Customer Approved Template in the drop-down under Load default template fieldset. Once you've saved the new transaction email go back to System → Configuration → Mageants → Customer Approval. Select the new template for the field Approved Email Template.

Rejected Email Template: Select the email template to use when customer is notified that their account has been rejected. You can override the default template by following the steps mentioned in Approved Email Template except that select Customer Rejected Email Template in the dropdown under Load default template fieldset.



Configuration Save Config

Redirect Customers (store view)

Redirect Customers: No

If 'NO' is selected customers will be redirected to the previous page with message entered in the next field.

Unapproved Customer Message (store view)

Unapproved Customer Message: [Text Field]

If specified message will be shown either on the previous page or redirected page but not redirected URL.

Redirect to CMS page (store view)

Redirect to CMS page: Home Page

Custom Redirect URL (store view)

Custom Redirect URL: [Text Field]

Will be redirected to a custom URL if left blank the customer will be redirected to the cms page if allowed.

Admin Notification

Notify Admin after account creation (store view)

Notify Admin after account creation: No

Email Sender (store view)

Email Sender: Custom Email 1

Email Template (store view)

Email Template: Admin Notification

Recipients (store view)

Recipients: [Text Field]

Seperared by comma (,). Ex: abc@example.com, xyz@example.com

Callouts:

- Select Yes to Redirect Customer After Registration (points to Redirect Customers)
- Message For Pending Customers (points to Unapproved Customer Message)
- Select Page for Customer Redirect (points to Redirect to CMS page)
- Write Custom Url for Customer Redirect (points to Custom Redirect URL)
- Select Email Sender (points to Email Sender)
- Select Email Template (points to Email Template)
- Add recipients seperated by comma (,) (points to Recipients)

REDIRECT SETTINGS

Redirect Customers: Select Yes to redirect the customers to a different page when their account has not been approved. This can be either a CMS page or any internal or external URL.

Unapproved Customer Message: This message will be displayed when the customer tries to login and their account has not been approved.

Custom Redirect URL: Enter the URL to the page unapproved customers will be redirected to.

ADMIN NOTIFICATION: Notify Admin after account creation: Select Yes to notify the admin of the new registration.

Email Sender: Select the email sender from list of email senders available in magento. To configure please check Email Sender under Email Settings explained above.

Email Template: Select the email template you want to use to send to the admin when a customer registers on the site. You can override the default template by following the steps mentioned in Approved Email Template except that select Account registration admin notification in the dropdown under Load default template fieldset.

Recipients: Enter admin email(s) separated by a comma(,). Example: johndoe@example.com, janedoe@example.com

Customer Page

[Add New Customer](#)

Search by keyword

Actions 2 records found 20 per page 1 of 1

<input type="checkbox"/>	Approval Status	ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth
<input type="checkbox"/>	APPROVED	1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Sep 28, 2018 12:22:03 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973
<input type="checkbox"/>	PENDING	2	admin test	admintest@gmail.com	General					Sep 28, 2018 1:26:24 PM	Main Website	Confirmation Not Required	Default Store View	

[Display Approval Status of Customer in Grid](#)

APPROVE / REJECT CUSTOMERS

To approve / reject customers go to Customer > All Customers. There are three ways to approve or reject customers.

1. Click on the Approve / Reject options to Approve / Reject the customer corresponding to the grid row.

[Add New Customer](#)

Search by keyword

Actions 2 records found 20 per page 1 of 1

Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax/VAT Number	Gender	Action
roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Sep 28, 2018 12:22:03 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female	Select <input type="button" value="v"/> Edit Approve Reject
admintest@gmail.com	General					Sep 28, 2018 1:26:24 PM	Main Website	Confirmation Not Required	Default Store View				

[Approve and Reject Options in Action Select](#)

2. On the customer edit page, click on Approve button to Approve customer and Reject button to Reject customer.

Veronica Costello 🔍 🔔 👤 admin ▾

Approve Button Reject Button

← Back Delete Customer Approve Customer Reject Customer Reset Create Order Reset Password Force Sign-In Save and Continue Edit Save Customer

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Billing Agreements

Personal Information

Last Logged In:	Oct 1, 2018, 10:36:04 AM (Offline)	Default Billing Address
Account Lock:	Unlocked	Veronica Costello
Confirmed email:	Confirmation Not Required	6146 Honey Bluff Parkway
Account Created:	Sep 28, 2018, 12:22:03 PM	Calder, Michigan, 49628-7978
Account Created In:	Default Store View	United States
Customer Group:	General	T: (555) 229-3326

3. To Approve / Reject customers in batch, go to Customers > All Customers. Select the customers by selecting the check-boxes on Corresponding to the customers you want to Approve / Reject. Each row Click OK in the pop-up if you want to Approve / Reject.

Add New Customer

🔍

Filters
👁 Default View ▾
⚙ Columns ▾
📄 Export ▾

Actions ▾

- Delete
- Subscribe to Newsletter
- Unsubscribe from Newsletter
- Assign a Customer Group
- Edit
- Approve
- Reject

2 records found 20 per page < 1 of 1 >

Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	De of Bil
Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Sep 28, 2018 12:22:03 PM	Main Website	Confirmation Not Required	Default Store View	De 15 19
admin test	admintest@gmail.com	General					Sep 28, 2018 1:26:24 PM	Main Website	Confirmation Not Required	Default Store View	

Approve and Reject Options in MassActions


Frontend example


Redirected Page After Registration

Displays message which is specified in Store Configuration.

Create New Customer Account

Message for Pending Customers After Registration

 Your account requires approval. You will be notified via email when your account is approved or rejected.

 Thank you for registering with Main Website Store.

Personal Information

First Name *

Last Name *

Sign Up for Newsletter

Sign-in Information


Email *


Login Page

Display message that customer is Pending or Rejected, if customer will try to Login before approval.

Customer Login

Error message if approval is pending

 Your account requires approval. You will be notified via email when your account is approved or rejected.

<p>Registered Customers</p> <hr/> <p>If you have an account, sign in with your email address.</p> <p>Email *</p> <input type="text"/> <p>Password *</p> <input type="password"/> <p>Please type the letters and numbers below *</p> <input type="text"/> <p></p> <p><input type="button" value="Reload captcha"/></p> <p><input type="button" value="Sign In"/> Forgot Your Password?</p>	<p>New Customers</p> <hr/> <p>Creating an account has many benefits: check out faster, keep more than one address, track orders and more.</p> <p><input type="button" value="Create an Account"/></p>
--	---



Thank you!

if you have any questions or feature suggestions, please contact us at:
<https://www.mageants.com/contact-us>

Your feedback is absolutely welcome!