

Customer Approval

Magento 2



Overview

Let yourself to become an admin, take control of all user accounts by managing custom approval feature of extension. It offers full control rights to admin for confining users, right after they register on website. Customer verification can be done in advance, For any specific requirement or reason admin can reject the account pre and post approval of same. Developed to support Multiple website.

Features

- **Appropriate warning or error message** can be set and displayed on customer's screen as per requirements.
- Whenever admin approves/rejects the account, **Notification email** is sent to customer and admin as per the email template selected.
- Functionality to **Approve/Reject multiple accounts** simultaneously.
- **Auto approval of user account** without admin interference.
- Use of **custom email templates** and setting up **customized message**.
- **Custom redirection** and **Redirect to CMS page** options available.
- **Recipients** email can be added.

How to Install extension using COMMAND LINE?

1. Backup your web directory and store database
2. Download Approve Customers extension.
3. Unzip the file in a temporary directory/folder with name as
ApproveCustomers
4. Put Magenticity directory as per this folder structure:
project_root/app/code/Magenticity/ApproveCustomers
5. Disable cache from System >> Cache Management.
6. Give proper file permission.
7. Enter following in the command line from your
magento_store_root:php bin/magento setup:upgrade
8. Enter following in the command line in your **magento_store_root**
to compile the code: php bin/magento setup:di:compile
9. Give proper file permission.
10. Enter following in the command line in your **magento_store_root**
to generate static files into your pub directory:
php bin/magento setup:static-content:deploy
11. Give proper file permission.
12. Enable/Refresh cache from System >> Cache Management.
13. Once all above steps are done, see the module (Approve Customers Approve Customers) at Stores >> Configuration >> Magenticity >> Approve Customers, the extension will be shown in the admin panel.

Customer Approval Extension Uninstallation instructions

1. Completely remove Magenticity_ApproveCustomers from your app/code.
2. Now, Remove entry from Your Database Table(eav_attribute)
3. Execute below query

```
SELECT * FROM eav_attribute where attribute_code ='approval_status';
```

After executing above query, you will see one record in table.

4. Now, delete this entry from eav_attribute table using below query.

```
Delete FROM eav_attribute where attribute_code ='approval_status';
```

Important Notes:

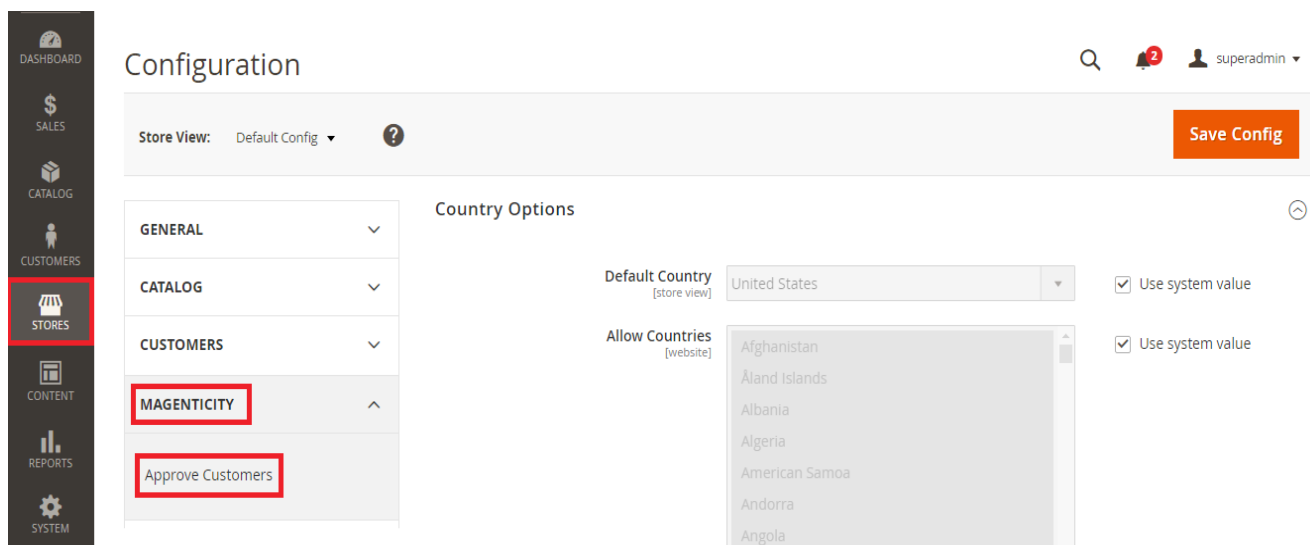
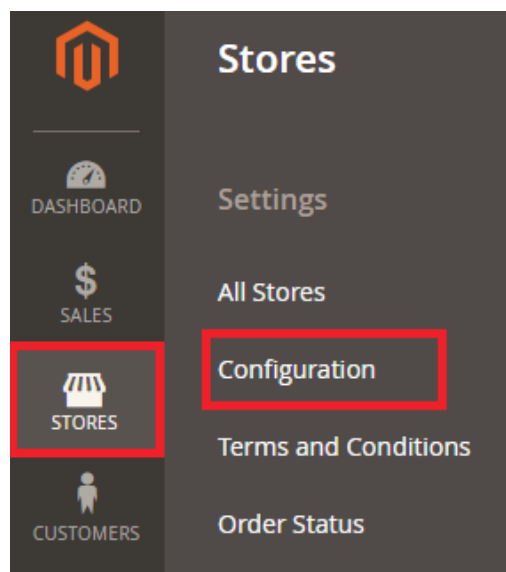
- ➔ To approve/reject customer accounts, you can do it from customer grid.

Login to Admin panel > All Customers > Action tab > Select

- ➔ For existing customers, The account status will change to “Approved” after extension installation.
- ➔ If approved customer is logged in and if admin rejects the account from backend at same time, then session will be abandoned and customer will be logged out.

How to Use?

To begin with setup, Initial step is to login into Magento admin panel. Now follow below screenshots in order to configure the extension.



Stores → Configuration → MagentiCity → Approve Customers

General Settings

General

Enable [store view]	Yes	▼
Auto Approve Customer Account [store view]	No	▼

Here we have 2 options under **General tab**.

1. **Enable/Disable the extension** by specifying Yes/No value as shown above in screenshot.
2. **Auto Approve Customer Account** has basically 2 values i.e. Yes/No.


If set to "Yes" then it will auto approve the new customer account being registered. **No admin confirmation will be taken.**

If the value is set to "No" then admin will need to approve the account manually from backend. Once admin approves the customer account from backend then only customers will be able to login to their account.

Case 1:

Enable	Yes
Auto Approve Customer Account	Yes

Assuming the **extension is enabled** and **Auto Approve Customer Account option is set to Yes**, Below is the **Welcome email and Customer account status email** the customer will receive on account creation.





magento support,
Welcome to Main Website Store.


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


Email: magento.support@vsourzLtd.com
Password: *Password you set when creating account*
 Forgot your account password? Click [here](#) to reset it.

When you sign in to your account, you will be able to:

- 

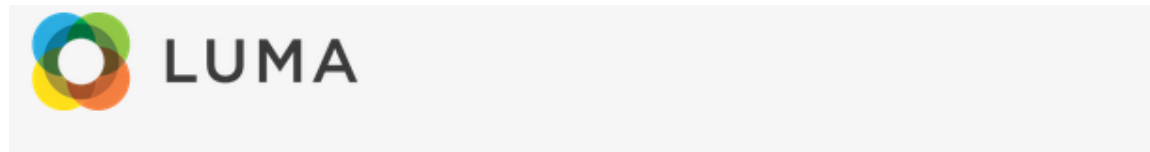
Proceed through checkout faster
- 

Check the status of orders
- 

Store alternative addresses
For shipping to multiple family members and friends
- 

View past orders

Customer Account Status Email



A new account has been registered on Main Website Store, Status- Approved

- **Name:** magento support
- **Email:** magento.support@vsourzLtd.com

Magento Backend Entry :- Auto Approved

<input type="checkbox"/>	ID ↓	Name	Email	Date of Birth	Action	Approval Status
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	Dec 15, 1973	Select ▼	APPROVED
<input type="checkbox"/>	2				Select ▼	APPROVED
<input type="checkbox"/>	3	Richie's Cars			Select ▼	REJECTED
<input type="checkbox"/>	4	magento support	magento.support@vsourzLtd.com		Select ▼	APPROVED

The highlighted entry in above screenshot is new customer account being approved directly without admin intervention/approval.

Email Settings

Email Settings

Notify Customer when approved/rejected <small>[store view]</small>	Yes	▼
Email Send by <small>[store view]</small>	General Contact	▼
Email Template for Account Approval <small>[store view]</small>	Customer Approved (Default)	▼
Email Template Account Rejection <small>[store view]</small>	Customer Rejected (Default)	▼

Here we have 4 options under **Email tab**.

1. **Notify Customer when approved/rejected** – if it is set to yes, then Customer account approved or rejected by admin will be notified to customer via email as per the status mentioned.
2. **Email Send by** – It can be any email address within the list of email addresses added in backend, basically specifying the role/type of user.
3. **Email Template for Account Approval** – Email template to be sent to customer once the account gets approved.
4. **Email Template for Account Rejection** – Email template to be sent to customer if the account gets rejected.

Case 1: *Notify Customer when approved/rejected*

In case of auto approve, You can refer ([here](#)).

How to manually approve/reject customer account? (Auto approve: No)

A. Create an account as shown below.

Create New Customer Account

Personal Information

First Name *

Last Name *

Sign-in Information

Email *

Password *

Password Strength: Medium

Confirm Password *

* Required Fields

Create an Account

B. After clicking on "Create an Account" button it will show below message.

Customer Login

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

Registered Customers

If you have an account, sign in with your email address.

Email *

Password *

[Sign In](#)

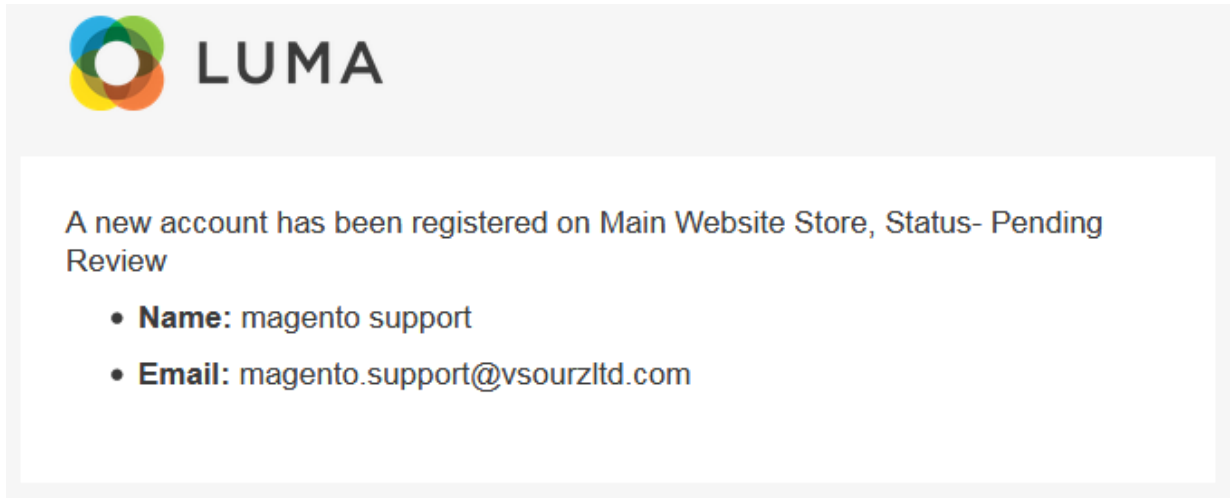
[Forgot Your Password?](#)

* Required Fields

C. Once the account goes in approval, Check customer list in backend which will show pending status for account that user attempted to create.

	ID ↓	Name	Email	Date of Birth	Action	Approval Status
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	Dec 15, 1973	Select ▼	APPROVED
<input type="checkbox"/>	2				Select ▼	APPROVED
<input type="checkbox"/>	3	Richie's Cars			Select ▼	REJECTED
<input type="checkbox"/>	6	Magento Support	magento.support@vsourzLtd.com		Select ▼	PENDING

D. Below is the email which will be sent to customer.




E. To further reject or approve the account, do following in backend. Select your desired value from drop down.

	ID ↓	Name	Email	Date of Birth	Action	Approval Status
<input type="checkbox"/>	2				Select ▼	APPROVED
<input type="checkbox"/>	3	Richie's Cars			Select ▼	REJECTED
<input type="checkbox"/>	7				Select ▼	PENDING
<input type="checkbox"/>	8	magento support	magento.support@vsourzLtd.com		Select ▲ Edit Approve Reject	PENDING

Note:- Clicking on "Edit" will take you to customer account information page.

F. If clicked on "Approve". Below email will be sent to customer and admin respectively.

To Customer




magento support,
Welcome to Main Website Store.
Your account has been **approved** at Main Website Store.
To sign in to our site, use these credentials during checkout or on the [My Account](#) page:

- **Email:** magento.support@vsourzLtd.com
- **Password:** *Password you set when creating account*

When you sign in to your account, you will be able to:

- Proceed through checkout faster
- Check the status of orders
- View past orders
- Store alternative addresses (for shipping to multiple family members and friends)

To Admin

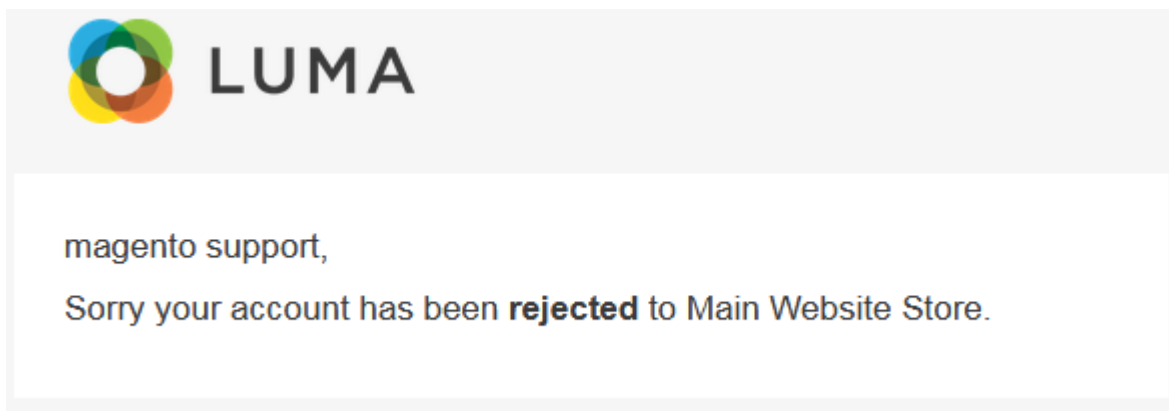


Hello, Admin
This user account Approved on Main Website Store,

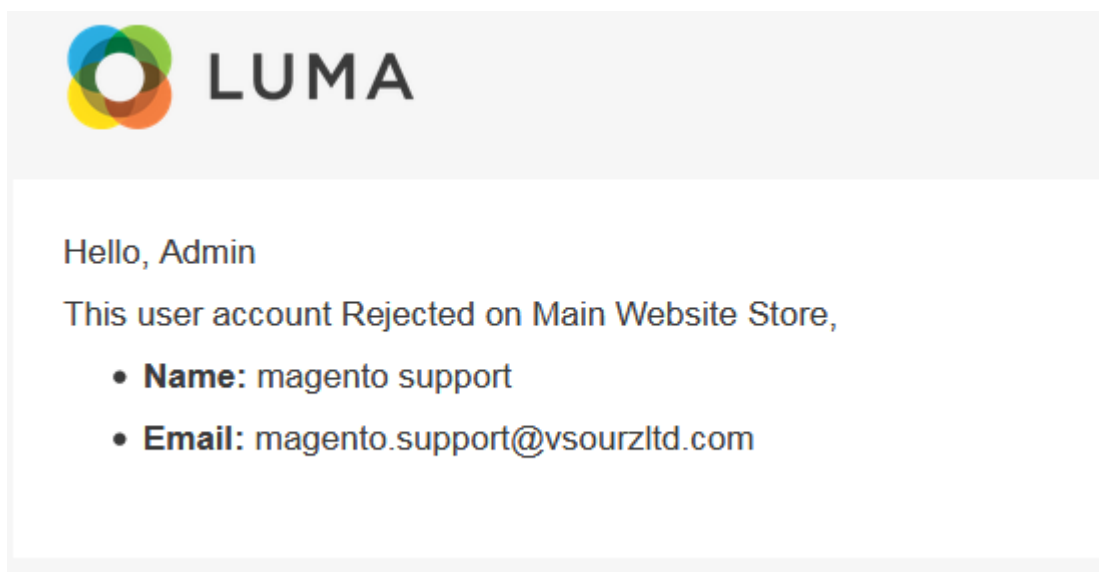
- **Name:** magento support
- **Email:** magento.support@vsourzLtd.com

G. If clicked on "Reject". Below email will be sent to customer and admin respectively.

To Customer



To Admin



Redirect Settings

Redirect Settings

Pending Customer Message <small>[store view]</small>	<input type="text" value="Your account requires approval. You will be notified via email when your account is approved or rejected."/>
	If specified message will be shown either on the previous page or redirected page but not redirected URL.
Rejected Customer Message <small>[store view]</small>	<input type="text" value="Your account is rejected by admin."/>
	If specified message will be shown either on the previous page or redirected page but not redirected URL.
Redirect Customers <small>[store view]</small>	<input type="text" value="Yes"/> ▼
	If 'No' is selected customers will be redirected to the previous page with message entered in the next field.
Redirect To CMS page <small>[store view]</small>	<input type="text" value="Login"/> ▼
Custom Redirect URL <small>[store view]</small>	<input type="text"/>
	Will be redirected to a custom URL. If left blank the customer will be redirected to CMS page if allowed.

Here we have 5 options under **Redirect tab**.

1. **Pending Customer Message** – Once user will create an account, User will be redirected to login page with a message entered in current field. This message will be displayed when account will go in approval stage (Pre-Approval).

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

2. **Rejected Customer Message** – This field contains the message that will be displayed on screen if user trying to login into the account which is rejected by admin from backend. See screenshot below.

Customer Login

 Your account is rejected by admin.

Registered Customers

If you have an account, sign in with your email address.

Email *

Password *

[Sign In](#)

[Forgot Your Password?](#)

* Required Fields

3. **Redirect Customers** and (4) **Redirect to CMS page** – If user is on “Create an Account” page and after clicking on “Create an Account” button, If Redirect Customers option is set to “Yes” in backend, It will redirect user to the page selected under “Redirect to CMS page” with appropriate message.

If Redirect Customers option is set to “No” in backend, then it will stay on same page hence, displaying an appropriate message.

4. **Custom Redirect URL** – Rather than redirecting customer to selected CMS page, You can specify here the custom URL of any website to which the user can be redirected.

Admin Notification

Admin Notification

Notify Admin after account creation <small>[store view]</small>	Yes	▼
Email Template <small>[store view]</small>	Account registration admin notification (Default)	
Email Sender <small>[store view]</small>	General Contact	
Recipients <small>[store view]</small>	magento.support@vsourzLtd.com	
	<small>Separated by comma (,). Ex: abc@example.com, xyz@example.com</small>	
Notify Admin after account Status Change <small>[store view]</small>	Yes	▼
Email Template Status Rejected <small>[store view]</small>	Account Status admin notification Rejected (Default)	
Email Template Status Approved <small>[store view]</small>	Account Status admin notification Approved (Default)	

1. **Notify Admin after account creation** – will have 2 values i.e. Yes/No. After creation of user account admin will be notified via email if this option is set to “Yes” and vice versa.
2. **Email Template** and **Email Sender** – Appropriate email template will be sent to admin on account creation. For Email Sender as explained earlier ([here](#)).
3. **Recipients** – will contain email address of admin for notification email to be sent on it.

4. ***Notify Admin after account Status Change*** – Whenever user account status is changed from backend i.e. from pending to approved, pending to rejected, approved to rejected or rejected to approved etc. admin will be notified via email alert if current option is set to “Yes”.