



# CHECKOUT CUSTOM FIELD FOR MAGENTO 2 USER GUIDE



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## 1. Checkout Custom Field for Magento 2 Extension Overview

[Checkout Custom Field for Magento 2](#) extension helps admins collect additional information from customers by letting them fill in custom fields during checkout process. Admin can create these custom fields and include them in Shipping or Review and Payments of the checkout page.

## 2. How Does Checkout Custom Field for Magento 2 Extension Work?

### 2.1. General

Go to **Stores** → **Configuration** → **BSSCommerce** → **Checkout Custom Field**.

Enable Checkout Custom Field <small>[store view]</small>	Yes
Version 1.1.0	
Custom Field Title <small>[store view]</small>	Additional Information
Title show in order detail, pdf, email...	
Format Date <small>[store view]</small>	Show Date and Time
Show in PDF Documents <small>[store view]</small>	Yes
Show in Email <small>[store view]</small>	Yes

In **Enable Checkout Custom Field**, choose Yes to enable the extension or No to disable it.

In **Custom Field Title**, enter the title for custom fields which are displayed in order detail, PDF invoice and email.

In **Format Date**, choose the format for the date input type to display on the checkout. There are 2 options:

- **Show Date and Time:** Both date and time is included in the calendar view.

Choose date and time for delivery

4/9/2018 07:00

◀ April 2018 ▶

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					

Time 07:00

Hour

Minute

Now Done

- **Only Date:** Only date is included in the calendar view.

Choose date and time for delivery

4/28/2018

◀ April 2018 ▶

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					

In **Show in PDF Documents**, choose Yes to include custom fields in PDF documents or NO to exclude them.

In **Show in Email**, choose Yes to include custom fields in email sent to customers or NO to exclude them.

## 2.2. Manage Checkout Custom Field

Go to Sales → BSSCommerce → Manage Checkout Custom Fields.

Manage Checkout Custom Fields 🔍 10 👤 admin ▾

[Add New Attribute](#)

⌵ Filters ⚙️ Columns ▾

6 records found 20 ▾ per page < 1 of 1 >

Attribute Code	Default Label	Input Type	Required	Frontend Visibility	Backend Visibility	Show in Checkout	Sort Order	Action
delivery_date	Choose date and time for delivery	Date & Time	Yes	Yes	Yes	Shipping	20	<a href="#">Edit</a>
subscribe_newsletter	Subscribe to our newsletter	Yes/No	Yes	Yes	Yes	Review & Payment	40	<a href="#">Edit</a>
promotion_type	Choose the promotion you wish to receive	Radio Button	No	Yes	Yes	Shipping	30	<a href="#">Edit</a>
shopping	Are you satisfied with your shopping experience?	Yes/No	Yes	Yes	Yes	Review & Payment	40	<a href="#">Edit</a>
referral_source	How can you find us?	Checkbox	Yes	Yes	Yes	Shipping	10	<a href="#">Edit</a>
comment	Leave comments for your order	Text Area	No	Yes	Yes	Review & Payment	30	<a href="#">Edit</a>

To create new custom field, click **Add New Attribute**.

In **Attribute Information** → **General Information** → **Attribute Properties**.

### Attribute Properties

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Default Label \*

Input Type for Store Owner

Values Required

Visibility \* 

**Main Website**  
**Main Website Store**  
Default Store View  
Vietnam store view



In **Default Label**, enter name of the new custom field.

In **Input Type for Store Owner**, choose one of the following input types for custom field: Text Field, Text Area, Date & Time, Yes/No, Checkbox, Radio Button, and Dropdown.

In **Values Required**, choose Yes to make the custom field compulsory to fill in; otherwise choose No.

In **Visibility**, select which store view the custom field is available.

In **Attribute Information** → **General Information** → **Advanced Attribute Properties**.

#### Advanced Attribute Properties

Attribute Code	<input type="text"/>
	<small>This is used internally. Make sure you don't use spaces or more than 30 symbols.</small>
Sort Order	<input type="text"/>
Default Value	<input type="text"/>
Input Validation for Store Owner	<input type="text" value="None"/>
Frontend Visibility	<input type="text" value="No"/>
Backend Visibility	<input type="text" value="No"/>
Show in Checkout	<input type="text" value="Shipping"/>
Add to Order Grid	<input type="text" value="Always"/>
Add to Order Detail	<input type="text" value="Yes"/>
Add to PDF Documents	<input type="text" value="Yes"/>
Add to Email	<input type="text" value="Yes"/>

In **Attribute Code**, enter a code for the new custom field. No space allowed and no more than 30 symbols.

In **Sort Order**, decide the order of displayed custom fields in checkout.

In **Default Value**, set default value for custom field so that if customers don't fill in that field, the default value will be applied.

In **Input Validation for Store Owner**, choose one of the following input types to be validated for custom field: Decimal Number, Integer Number, Email, URL, Letters, and Letters (a-z, A-Z) or Numbers (0-9).

In **Frontend Visibility**, choose Yes to display the field in the frontend; otherwise choose No.

In **Backend Visibility**, choose Yes to display the field in the backend; otherwise choose No.

In **Show in Checkout**, display custom field in Shipping Address, Shipping Method or Review & Payments of the checkout page.

In **Add to Order Grid**, choose Yes to add custom field to order grid; otherwise choose No.

In **Add to Order Detail**, choose Yes to add custom field to order detail; otherwise choose No.

In **Add to PDF Documents**, choose Yes to add custom field to PDF documents; otherwise choose No.

In **Add to Email**, choose Yes to add custom field to email; otherwise choose No.



### 2.3. Orders

Go to **Sales** → **Orders**.

Custom fields are added to **order grid**.

Orders Create New Order

Actions ▾ 22 records found Add custom fields to Order Grid 🔍 🔼 👁 ⚙ 📄 20 ▾ ⏪ ⏩

ID	Purchase Point	Purchase Date	Bill-to Name	Grand Total (Base)	Status		How can you find us?	Rate your shopping experience	Supplementary phone number	Favourite Sports	Become our partner	Delivery date	Order comment	Action
00000021	Main Website Main Website Store Default Store View	Jan 24, 2017, 2:01:00 AM		\$33.00	Pending	<input type="checkbox"/>	Google	Satisfied		Yoga	Yes	Jan 25, 2017	Drop a call before shipping	<a href="#">View</a>
00000020	Main Website Main Website Store Default Store View	Jan 24, 2017, 2:01:00 AM		\$180.00	Pending	<input type="checkbox"/>	Facebook, Commercial Video					Jan 24, 2017	New note	<a href="#">View</a>
00000019	Main Website Main Website Store Default Store View	Jan 24, 2017, 2:01:00 AM		\$90.00	Processing	<input type="checkbox"/>	Google, Newsletter					Jan 25, 2017	Insert your note here...	<a href="#">View</a>

BSSCommerce Checkout Custom Field for Magento 2 extension also supports you to get order information from API.

Custom fields are displayed in **order view page**.

#000000021 ← Back   Cancel   Send Email   Hold   Invoice   Ship

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Payment & Shipping Method

**Payment Information**

Check / Money order  
The order was placed using USD.

**Shipping & Handling Information**

**Flat Rate - Fixed \$5.00**

Add custom field in Order Detail

**Additional Information**

**Custom Field**

How can you find us?: Google  
 Rate your shopping experience: Satisfied  
 Supplementary phone number : 01266209809  
 Become our partner: Yes  
 Delivery date: 1/25/2017  
 Order comment: Drop a call before shipping

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Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount
Gabrielle Micro Sleeve Top	Ordered	\$28.00	\$28.00	Ordered 1	\$28.00	\$0.00	0%	\$0.00

## 2.4. PDF Invoice

In order to include custom field value in PDF invoice, you need to enable config **Show in PDF Documents** (see 2.1, page 3), and enable config **Add to PDF Documents** (see 2.2, page 6) before placing the test order.

Custom fields are displayed in **PDF invoice**.

### Additional Information

#### Custom Field

**How can you find us?:** Google  
**Rate your shopping experience:** Satisfied  
**Supplementary phone number :** 01266209809  
**Become our partner:** Yes  
**Delivery date:** 1/25/2017  
**Order comment:** Drop a call before shipping

Additional custom fields in PDF Invoice

### Items Invoiced

Product	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total
Gabrielle Micro Sleeve Top SKU: W502-M-Green Color: Green Size: M	\$28.00	1	\$28.00	\$0.00	\$0.00	\$28.00

### Order Total

#### Invoice History

Comment Text

#### Invoice Totals

Subtotal	\$28.00
Shipping & Handling	\$5.00
<b>Grand Total</b>	<b>\$33.00</b>

## 2.5. Email

Go to **Marketing** → **Communications** → **Email Templates** → Click **Add New Template** button.

After loading default template, in **Template Information**, click **Insert Variable**.

### New Template

Search, Notifications (2), User: admin

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

#### Load default template

Template

Load Template

#### Template Information

Currently Used For [Stores](#) -> [Configuration](#) -> [Sales Emails](#) -> [Order](#) -> [New Order Confirmation Template \(Default Config\)](#)

Template Name \*

Template Subject \*

Insert Variable...

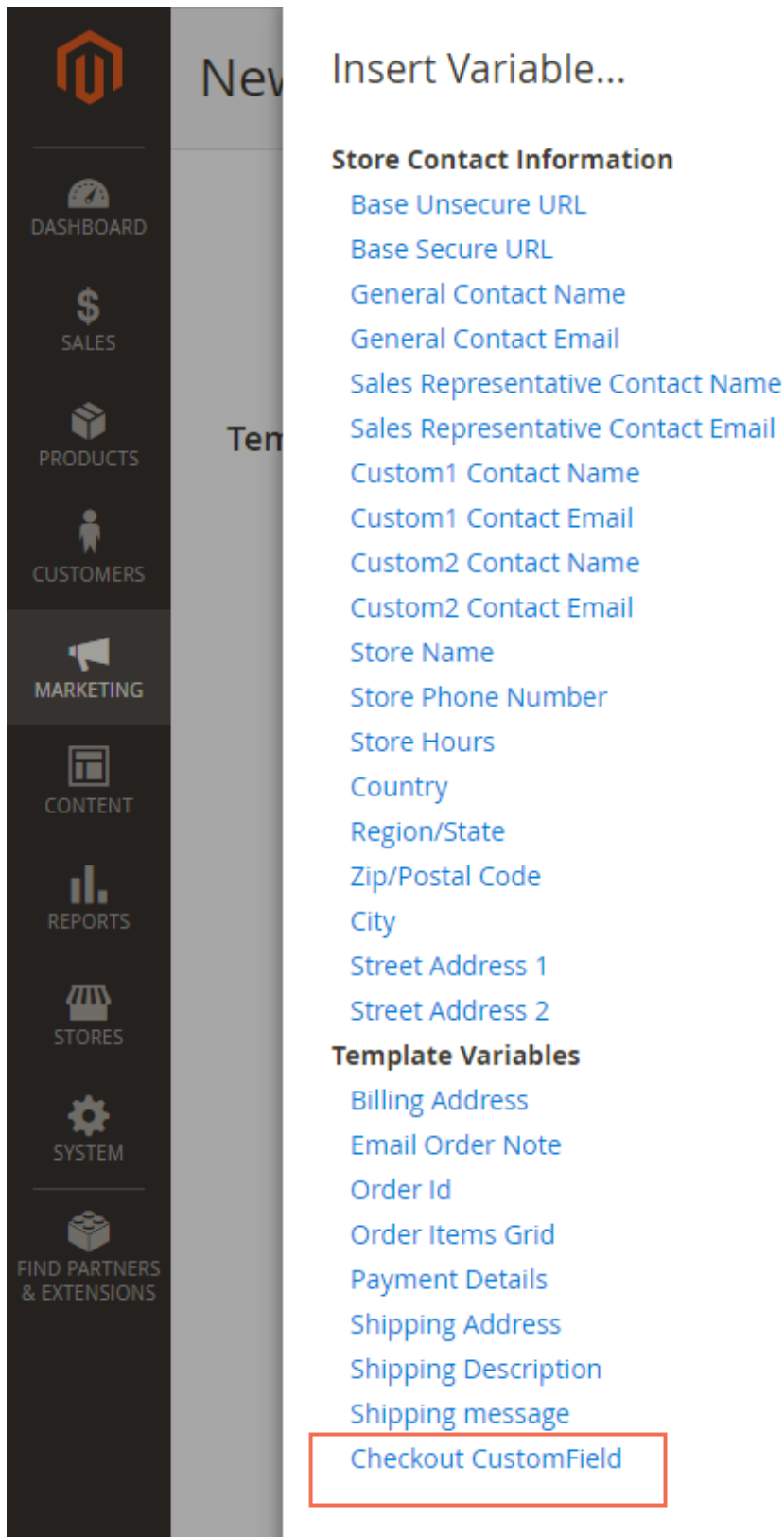
Template Content \* 

```

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

<table>
<tr class="email-intro">
<td>
<p class="greeting">{{trans "%customer_name,"
customer_name=$order.getCustomerName()}}</p>
<p>
{{trans "Thank you for your order from %store_name,"
store_name=$store.getFrontendName()}}
{{trans "Once your package ships we will send you a tracking
number."}}
```

Add the variable **Checkout Custom Field** to any place in the template content, then click **Save Template**.



New

Insert Variable...

Store Contact Information

- Base Unsecure URL
- Base Secure URL
- General Contact Name
- General Contact Email
- Sales Representative Contact Name
- Sales Representative Contact Email
- Custom1 Contact Name
- Custom1 Contact Email
- Custom2 Contact Name
- Custom2 Contact Email
- Store Name
- Store Phone Number
- Store Hours
- Country
- Region/State
- Zip/Postal Code
- City
- Street Address 1
- Street Address 2

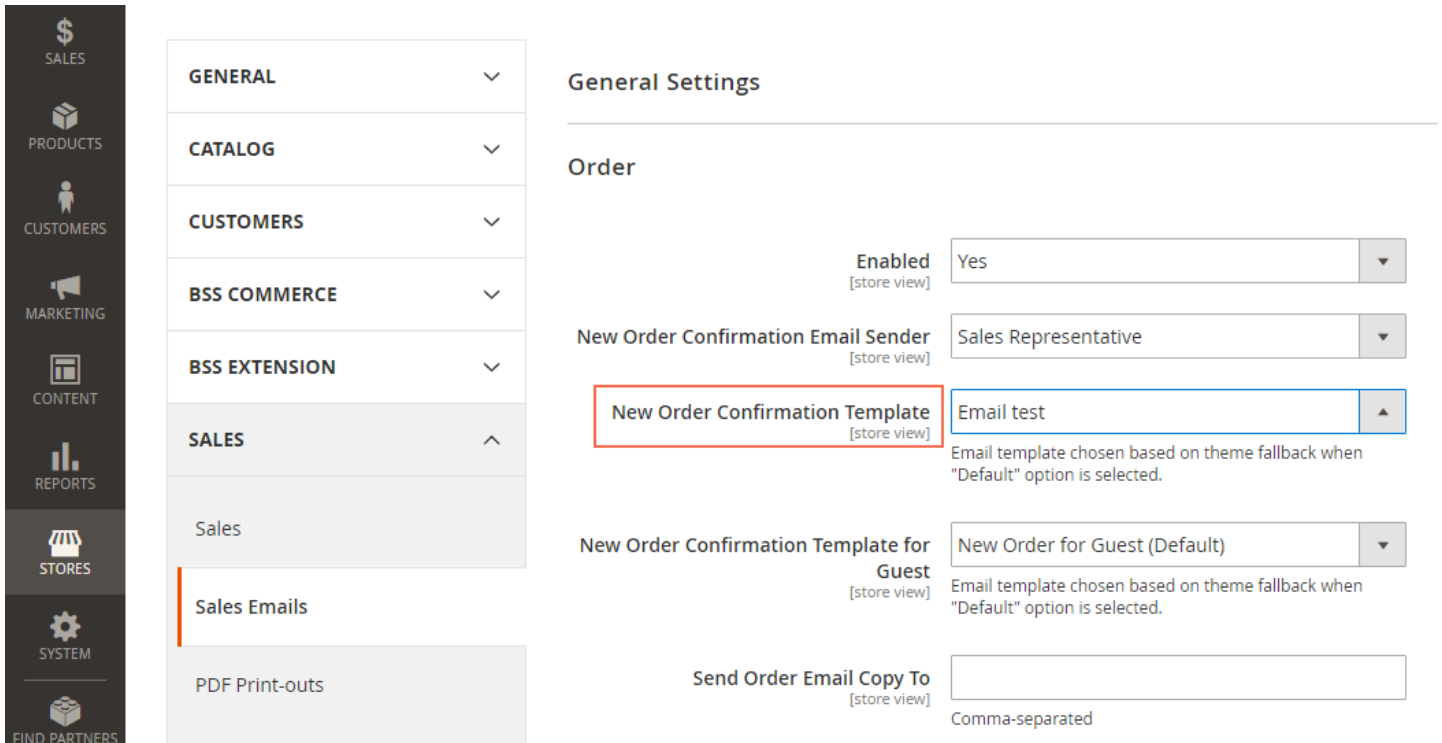
Template Variables

- Billing Address
- Email Order Note
- Order Id
- Order Items Grid
- Payment Details
- Shipping Address
- Shipping Description
- Shipping message
- Checkout CustomField

Tem

Then go to **Stores → Configuration → Sales → Sales Emails**.

In **Order → New Order Confirmation Email Template**, choose Email template you have just created.



When you send email to customer using the new template that has been created, the custom field value will be included.

Sophia Walford ,

Thank you for your order from Main Website Store. Once your package ships we will send an email with a link to track your order. If you have questions about your order, you can email us at [support@example.com](mailto:support@example.com).

### Your Order #000000047

Placed on Apr 5, 2017, 4:49:12 AM

#### Billing Info

Sophia Walford  
 Mason Dells, Austin, Texas, US  
 Austin , Texas, 78701  
 United States  
 T: +15122981473

#### Shipping Info

Sophia Walford  
 Mason Dells, Austin, Texas, US  
 Austin , Texas, 78701  
 United States  
 T: +15122981473

#### Payment Method

Check / Money order

#### Shipping Method

Best Way - Table Rate

#### Additional Information

Referral source: Facebook,Google,  
 Gift Message: John  
 Delivery date: 4/12/2017 11:00  
 Become partner: Yes  
 Promotion type: Free gift  
 Favourite Sports: Yoga,  
 Newsletter subscribe: [johndoe@domain.com](mailto:johndoe@domain.com)

Add to custom fields in Email

Items	Qty	Price
<b>Fusion Backpack</b> SKU: 24-MB02	1	\$59.00
	Subtotal	\$59.00
	Shipping & Handling	\$0.00
	<b>Grand Total</b>	<b>\$59.00</b>

### 3. Contact Us



Any questions or concern about us, feel free to contact:

Website: <http://bsscommerce.com>

Support: [support@bsscommerce.com](mailto:support@bsscommerce.com)

Skype: support.bsscommerce

*BSS Support team is always ready to aid you with any issue referring to our products. Additionally, we also give you Website development and Administration Support.*

We do offer:

1. Free installation services for commercial products.
2. Free updates within offered support period.

Our duties:

1. Responsibility for resolving product bugs.
2. Help with technical queries.
3. Technical support in installation and product usage.

