



USER GUIDE

Checkout Fields

| **CHECKOUT**

FIELDS



BELVG

Table of Contents

1. Introduction to Checkout Fields v.3.0	3
2. How to Install	4
3. How to Configure.....	6
4. How to Use	14

1. Introduction to Checkout Fields v.3.0

While trying to make the process of purchasing faster, you still need to gather information about customers. When this is the case, use Magento checkout fields to add additional fields to the checkout in your online store. You can easily manage fields for your clients to fill in. Magento checkout fields module is very flexible and easy to install.

Key features:

- Unlimited number of fields;
- All types of fields available;
- Different types of field validation to add to the fields;
- Add fields to any of the checkout steps, even to several of them;
- Track statistics of the customer answers;
- Quickly edit and manage the fields (drag&drop);
- Unique fields for different store languages available;
- Answers are saved on the order page;
- Set dates for the fields to appear and disappear on frontend automatically.

Overall information

You can now easily add custom fields to any checkout steps with Magento Checkout Fields extension. Any type of field – selects, text, radio buttons, etc. Make them required or not, add validation, add different fields for different languages or stores. It is really easy to edit fields and gather statistics. A perfect choice both for specific cases where you require some information from the customers and when you just allow them to answer a couple of questions for you.

2. How to Install

Step 1. Check Permissions.

Make sure the "app", "skin", "media" and "js" directories of your Magento and all directories inside them have full written permissions or set permissions on each directory equal to 777 or 0777.

Important! Change all permissions back after installation.

Read more about permissions [here](#). Step

Step 2. Disable Cache.

Log into Magento Admin Panel and go to System → Cache Management and disable cache.

Read more about Cache Management [here](#).

Step 3. Disable Compilation.

Log into Magento Admin Panel and go to System → Tools → Compilation and disable the compilation.

Step 4. Upload files

Upload all files and folders from folder to the installation directory of your Magento software using an FTP client. Step

Step 5. Re-login.

Log out and back into Magento Admin Panel.

Step 6. Enable extension.

- Go to System → Configuration. In the left column you will see the new tab – Belvg Extensions.
- Enable extension for the whole website or selected store.

Now extension is installed and enabled.

After this step you can change all permissions, cache and compilation settings back.

How to Deactivate

Step 1. Disable Extension.

Log into Magento Admin Panel and go to System → Configuration → BelVG module → Settings

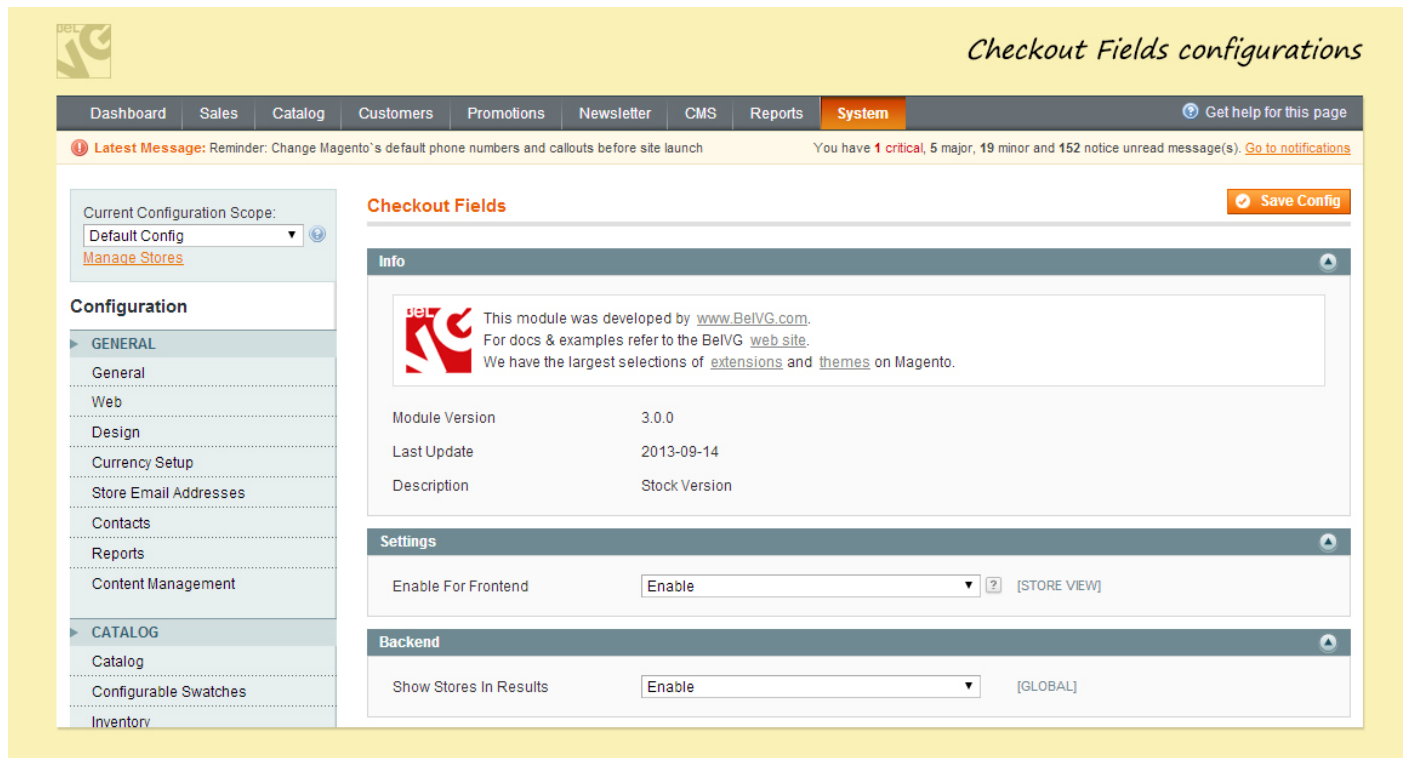
Select "Disable" to deactivate the extension. Click "Save Config" button. The extension is now deactivated.

Step 2. Clear cache.

Go to System → Cache Management. Clear the store cache.

3. How to Configure

Log in to the admin panel, and we will show you how to configure the extension step by step. First go to **System → Configuration → Checkout Fields**. Here you will see module settings:

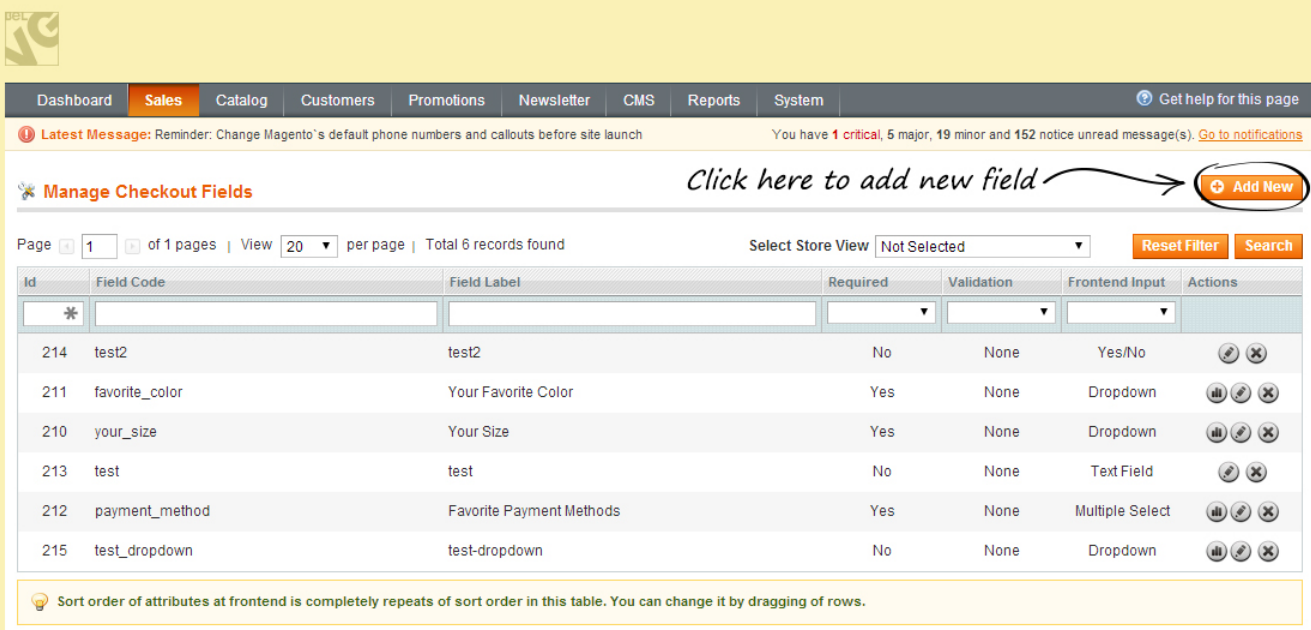


The screenshot shows the Magento Admin Panel interface. The top navigation bar includes links for Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System (highlighted). A message bar at the top indicates a reminder to change Magento's default phone numbers and callouts before site launch, and a notification count of 1 critical, 5 major, 19 minor, and 152 unread messages. The left sidebar shows the Configuration menu with options like General, Web, Design, Currency Setup, Store Email Addresses, Contacts, Reports, Content Management, CATALOG, and Inventory. The main content area is titled "Checkout Fields configurations" and features a "Save Config" button. The "Checkout Fields" section includes an "Info" tab with details about the module (version 3.0.0, last update 2013-09-14) and a "Settings" tab with two configuration options: "Enable For Frontend" (set to "Enable" for [STORE VIEW]) and "Show Stores In Results" (set to "Enable" for [GLOBAL]).

- **Enable for Frontend** – enable or disable extension on the frontend.
- **Show stores in result** – choose whether to show stores in the statistics results.

How to create a new field

To create a new checkout field go to **Sales → Checkout Fields**. Here you will see the list of all fields. Press “add new” button to create a new field.



Dashboard Sales Catalog Customers Promotions Newsletter CMS Reports System [Get help for this page](#)

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Manage Checkout Fields

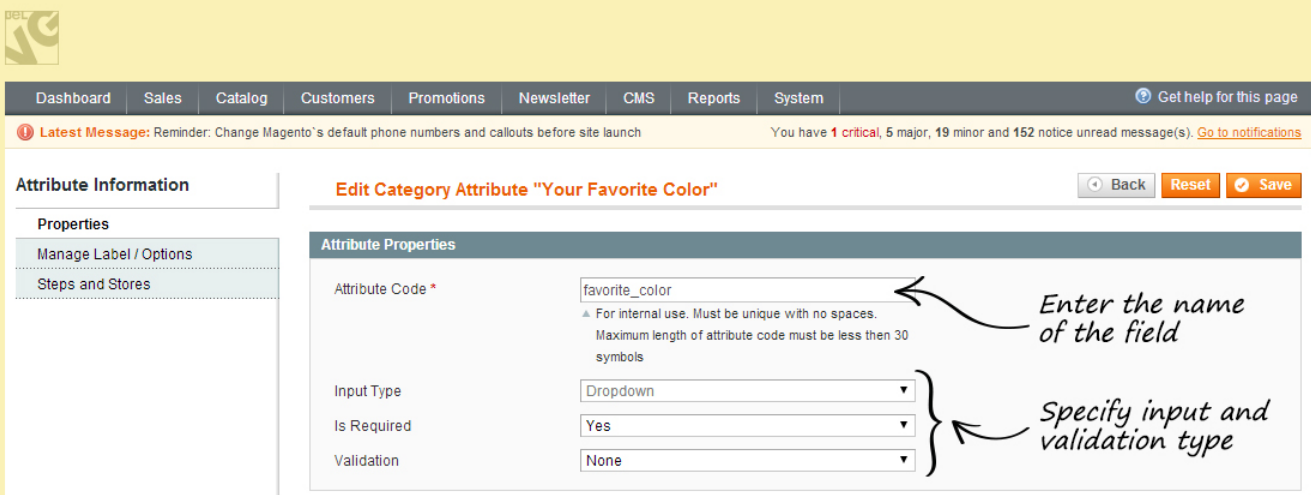
Click here to add new field → [Add New](#)

Page 1 of 1 pages | View 20 per page | Total 6 records found Select Store View Not Selected [Reset Filter](#) [Search](#)

ID	Field Code	Field Label	Required	Validation	Frontend Input	Actions
*						
214	test2	test2	No	None	Yes/No	Edit Delete
211	favorite_color	Your Favorite Color	Yes	None	Dropdown	Edit Delete
210	your_size	Your Size	Yes	None	Dropdown	Edit Delete
213	test	test	No	None	Text Field	Edit Delete
212	payment_method	Favorite Payment Methods	Yes	None	Multiple Select	Edit Delete
215	test_dropdown	test-dropdown	No	None	Dropdown	Edit Delete

Sort order of attributes at frontend is completely repeats of sort order in this table. You can change it by dragging of rows.

First you will see the **Properties Tab** where you have to choose the field name and its type.



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Attribute Information

Properties
 Manage Label / Options
 Steps and Stores

Edit Category Attribute "Your Favorite Color"

[Back](#) [Reset](#) [Save](#)


Attribute Properties

Attribute Code * *Enter the name of the field*
▲ For internal use. Must be unique with no spaces.
 Maximum length of attribute code must be less than 30 symbols

Input Type *Specify input and validation type*
 Is Required
 Validation

- **Attribute Code** – enter the attribute code for the field;
- **Input type** – select the type of the field. Different field types are available such as text area, date, yes/no, multiple select, dropdown;
- **Is Required** – select whether this field is required or not;
- **Validation** – choose the validation type for this field. It can be decimal number, integer number, email, url, letters (a-z, A-Z) or numbers (0-9);
- **Default value** – enter the default value for this field.

If your store operates different languages, choose **Manage Label Tab** and insert field name in the forms provided. On this page you can also add and manage **Options** (values of your field) if it is necessary.


Specify field name and properties for different languages

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Attribute Information

Properties

Manage Label / Options

Steps and Stores

Back Reset Save

💡 If you do not specify an option value for a specific store view then the default (Admin) value will be used.

Manage Titles (Size, Color, etc.)

Admin	English	French	German
Your Favorite Col	<input type="text"/>	<input type="text"/>	<input type="text"/>

Manage Options (values of your attribute)

Admin	English	French	German	Position	Is Default	
Blue	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="radio"/>	Add Option
Green	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="radio"/>	Delete
Red	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="radio"/>	Delete

Then go to **Steps and stores tab**. Here you can choose the checkout step for every store where the field will be displayed.



Define the field location, date and tool tip for every store

Dashboard
Sales
Catalog
Customers
Promotions
Newsletter
CMS
Reports
System
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Attribute Information

- Properties
- Manage Label / Options
- Steps and Stores

Edit Category Attribute "Your Favorite Color"

[Back](#)
[Reset](#)
[Save](#)

Main Website / English

Checkout Steps:

Date From:

Date To: [Reset](#)

Tooltip:

Main Website / French

Checkout Steps:

Date From:

Date To: [Reset](#)

Tooltip:

Main Website / German

Checkout Steps:

Date From:

Date To: [Reset](#)

Tooltip:

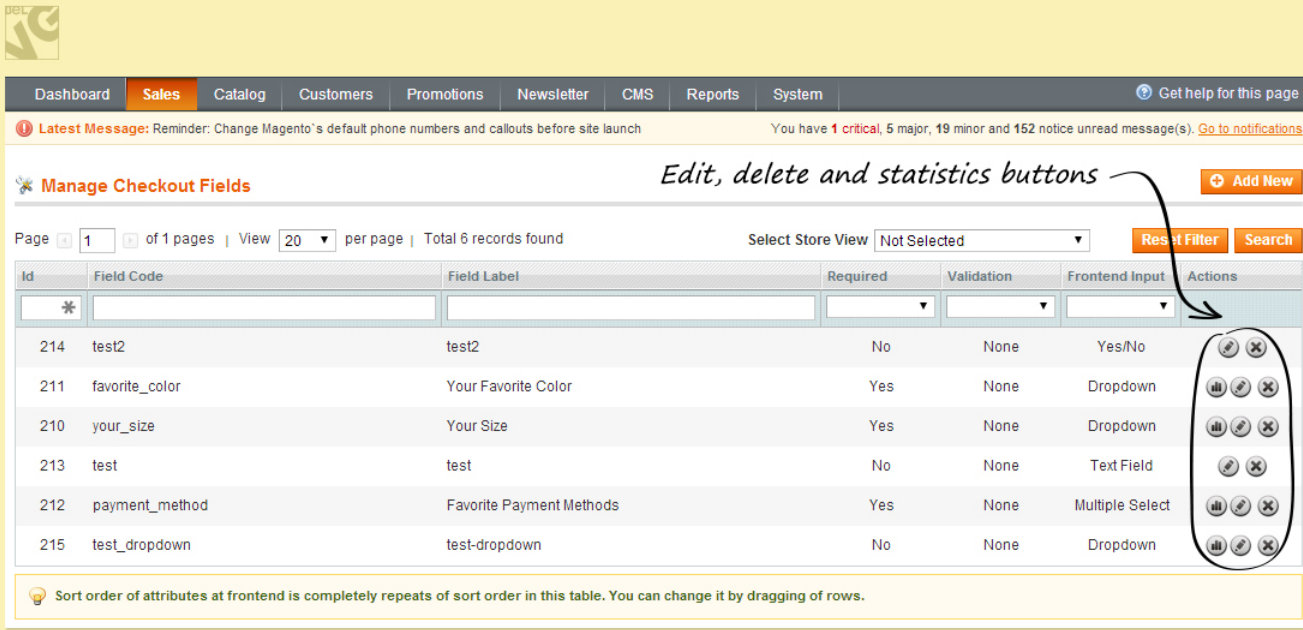
- **Checkout Steps** – choose one of the five checkout steps (billing, shipping, shipping_method, payment review) where the field will be displayed. You can also disable this field for particular stores;
- **Date from** – choose the date you want to start displaying the field;
- **Date to** - choose the date you want to stop displaying the field;

- **Tooltip** – enter the tooltip that will be displayed near the field to help customers to fill in the field.

Press **save button** to create the new checkout field.

How to manage checkout fields

In the list of all checkout fields you will see the action buttons to **view statistics**, **edit** or **delete** field.



Manage Checkout Fields

Edit, delete and statistics buttons

Page 1 of 1 pages | View 20 per page | Total 6 records found

Select Store View: Not Selected

Buttons: Reset Filter, Search, Add New

Id	Field Code	Field Label	Required	Validation	Frontend Input	Actions
*						
214	test2	test2	No	None	Yes/No	[Edit] [Delete] [Statistics]
211	favorite_color	Your Favorite Color	Yes	None	Dropdown	[Edit] [Delete] [Statistics]
210	your_size	Your Size	Yes	None	Dropdown	[Edit] [Delete] [Statistics]
213	test	test	No	None	Text Field	[Edit] [Delete] [Statistics]
212	payment_method	Favorite Payment Methods	Yes	None	Multiple Select	[Edit] [Delete] [Statistics]
215	test_dropdown	test-dropdown	No	None	Dropdown	[Edit] [Delete] [Statistics]

Sort order of attributes at frontend is completely repeats of sort order in this table. You can change it by dragging of rows.

If you press the **statistics button** you see the popup with the field statistics for all stores (if configured). You can switch the statistics between quantity and percent.



Popup with field statistics

Dashboard | **Sales** | Catalog | Customers | Promotions | Newsletter | CMS | Reports | System | [Get help for this page](#)

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Manage Checkout Fields

Page 1 of 1 pages | View 20 per page

Id	Field Code	Field Label	Required	Validation	Frontend Input	Actions
216	delivery_date				Date	
211	favorite_color	Your Favorite Color	Yes	None	Dropdown	
210	your_size	Your Size	Yes	None	Dropdown	
212	payment_method	Favorite Payment Methods	Yes	None	Multiple Select	

Sort order of attributes at frontend is completely repeats of sort order in this table. You can change it by dragging of rows.

Sort order of the attributes at the frontend is completely repeats of sort order in the list. You can change it by **dragging the rows**. Note that the custom checkout fields are placed after the standard fields on the frontend.



Change the sort order of the attributes

Dashboard | **Sales** | Catalog | Customers | Promotions | Newsletter | CMS | Reports | System | [Get help for this page](#)

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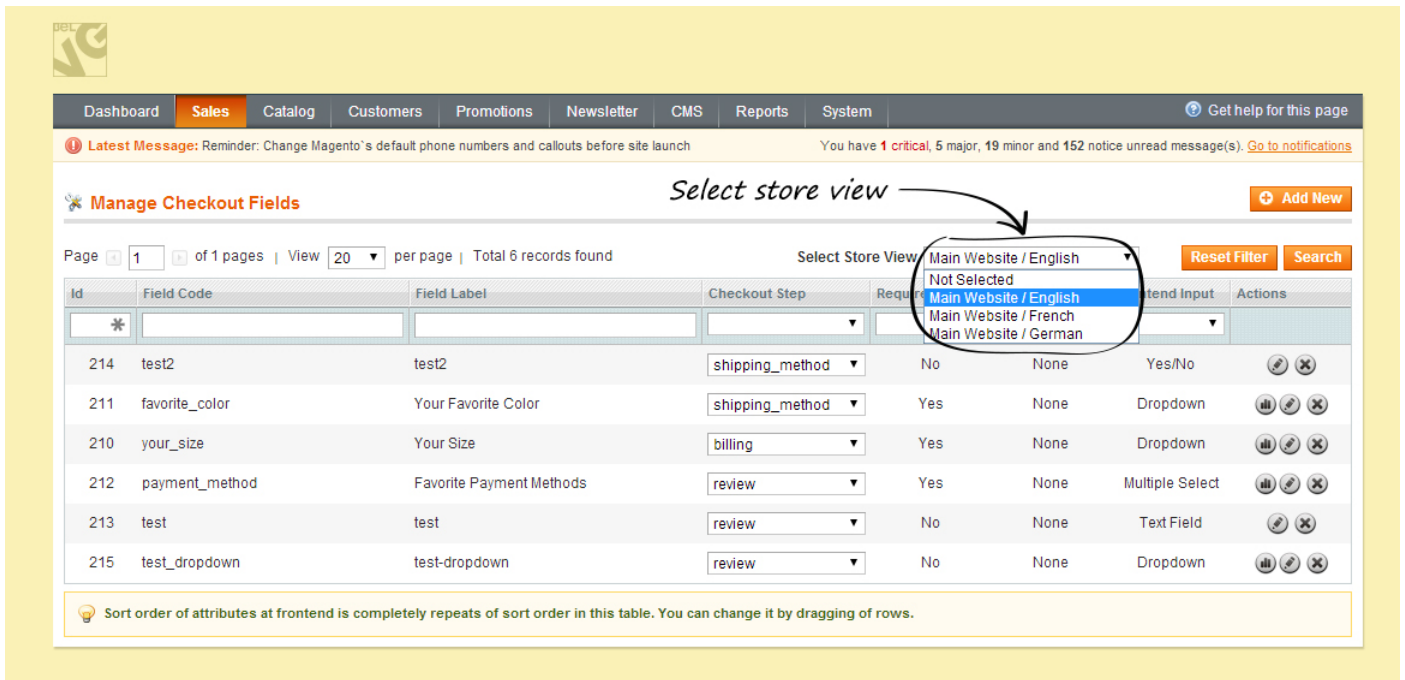
Manage Checkout Fields

Page 1 of 1 pages | View 20 per page | Total 6 records found | Select Store View: Not Selected | [Reset Filter](#) | [Search](#)

Id	Field Code	Field Label	Required	Validation	Frontend Input	Actions
214	test2	test2	No	None	Yes/No	
211	favorite_color	Your Favorite Color	Yes	None	Dropdown	
210	your_size	Your Size	Yes	None	Dropdown	
212	payment_method	Favorite Payment Methods	Yes	None	Multiple Select	
213	test	test	No	None	Text Field	
215	test_dropdown	test-dropdown	No	None	Dropdown	

Sort order of attributes at frontend is completely repeats of sort order in this table. You can change it by dragging of rows.

You can easily **select store view** and see fields only for a particular store.



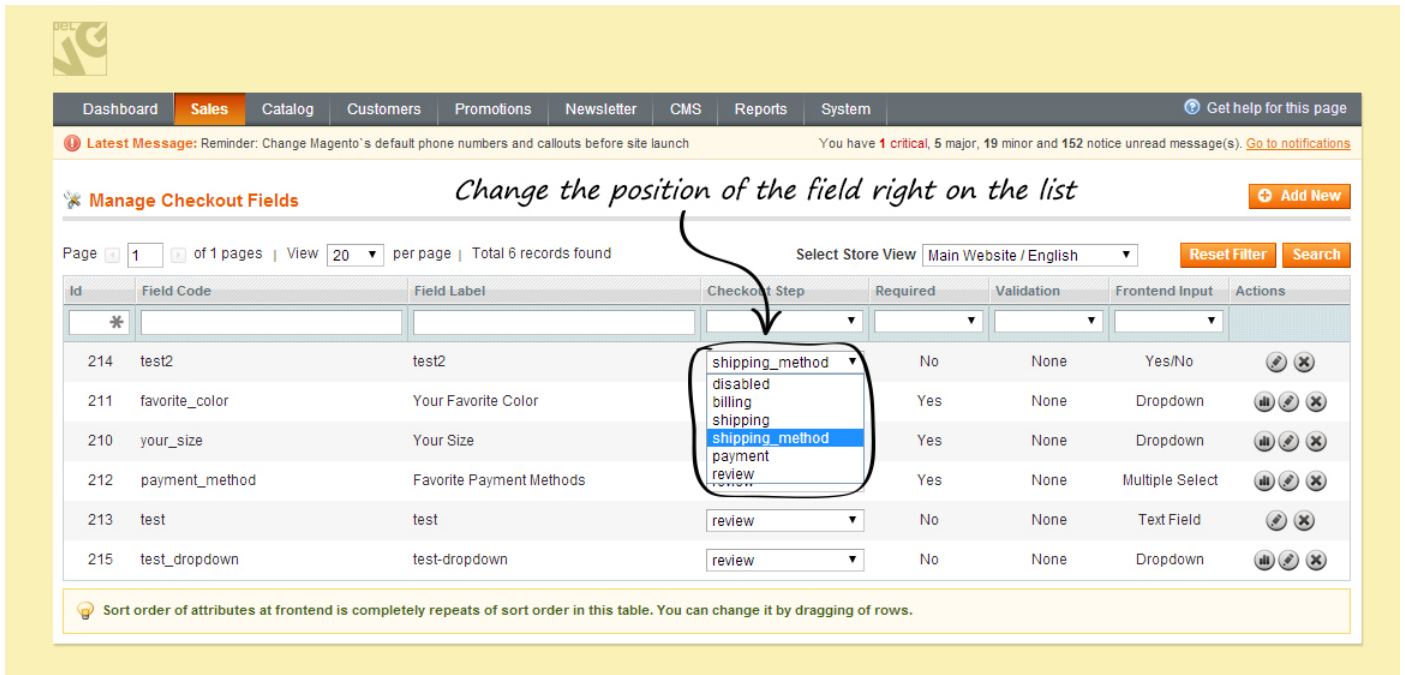
Manage Checkout Fields

Select Store View: **Main Website / English** (selected), Not Selected, Main Website / English, Main Website / French, Main Website / German

ID	Field Code	Field Label	Checkout Step	Required	Validation	Frontend Input	Actions
214	test2	test2	shipping_method	No	None	Yes/No	[edit] [delete]
211	favorite_color	Your Favorite Color	shipping_method	Yes	None	Dropdown	[edit] [delete]
210	your_size	Your Size	billing	Yes	None	Dropdown	[edit] [delete]
212	payment_method	Favorite Payment Methods	review	Yes	None	Multiple Select	[edit] [delete]
213	test	test	review	No	None	Text Field	[edit] [delete]
215	test_dropdown	test-dropdown	review	No	None	Dropdown	[edit] [delete]

Sort order of attributes at frontend is completely repeats of sort order in this table. You can change it by dragging of rows.

After you choose the store you will see the fields for this particular store and can easily and quickly **manage them right in the list**. Here you can change the checkout step.



Manage Checkout Fields

Select Store View: Main Website / English

Change the position of the field right on the list

ID	Field Code	Field Label	Checkout Step	Required	Validation	Frontend Input	Actions
214	test2	test2	shipping_method	No	None	Yes/No	[edit] [delete]
211	favorite_color	Your Favorite Color	shipping_method	Yes	None	Dropdown	[edit] [delete]
210	your_size	Your Size	shipping_method	Yes	None	Dropdown	[edit] [delete]
212	payment_method	Favorite Payment Methods	payment	Yes	None	Multiple Select	[edit] [delete]
213	test	test	review	No	None	Text Field	[edit] [delete]
215	test_dropdown	test-dropdown	review	No	None	Dropdown	[edit] [delete]

Sort order of attributes at frontend is completely repeats of sort order in this table. You can change it by dragging of rows.

You can also **sort fields** using the filters at the top of the list.

DashboardSalesCatalogCustomersPromotionsNewsletterCMSReportsSystem

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Manage Checkout Fields

Sort attributes by different types

Add New

Page 1 of 1 pages | View 20 per page | Total 6 records found

Select Store View Main Website / English

Reset Filter

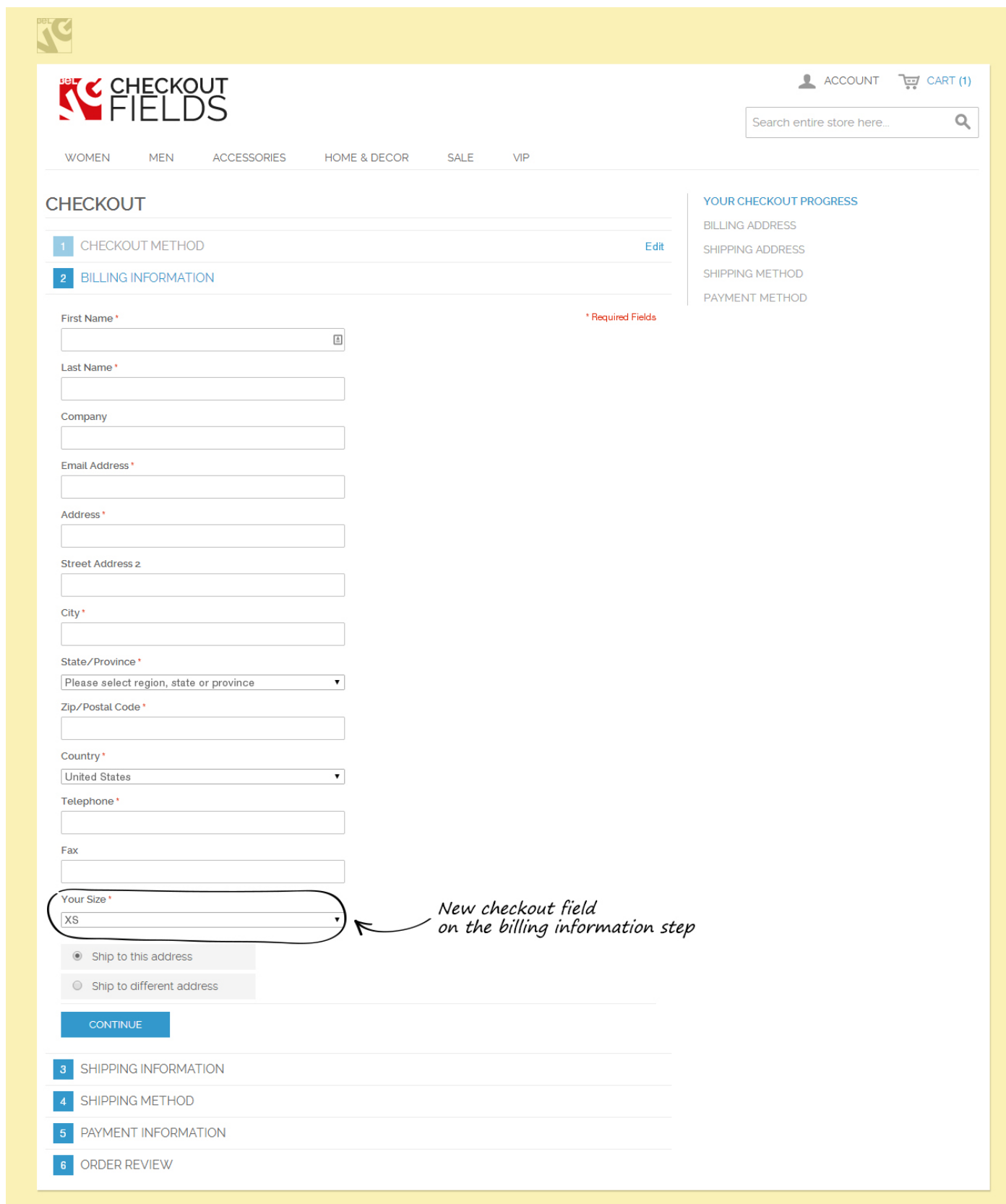
Search

Id	Field Code	Field Label	Checkout Step	Required	Validation	Frontend Input	Actions
*							
214	test2	test2	shipping_method	No			
211	favorite_color	Your Favorite Color	shipping_method	Yes			
210	your_size	Your Size	billing	Yes			
212	payment_method	Favorite Payment Methods	review	Yes			
213	test	test	review	No	None	Text Field	
215	test_dropdown	test-dropdown	review	No	None	Dropdown	

Sort order of attributes at frontend is completely repeats of sort order in this table. You can change it by dragging of rows.

4. How to Use

Checkout fields will be placed at the checkout steps that configured in the module settings.



CHECKOUT FIELDS

ACCOUNT CART (1)

Search entire store here...

WOMEN MEN ACCESSORIES HOME & DECOR SALE VIP

CHECKOUT

1 CHECKOUT METHOD Edit

2 BILLING INFORMATION

YOUR CHECKOUT PROGRESS

BILLING ADDRESS

SHIPPING ADDRESS

SHIPPING METHOD

PAYMENT METHOD

First Name * * Required Fields

Last Name *

Company

Email Address *

Address *

Street Address 2

City *

State/Province *

Please select region, state or province

Zip/Postal Code *

Country *

United States

Telephone *

Fax

Your Size *

XS

Ship to this address

Ship to different address

CONTINUE

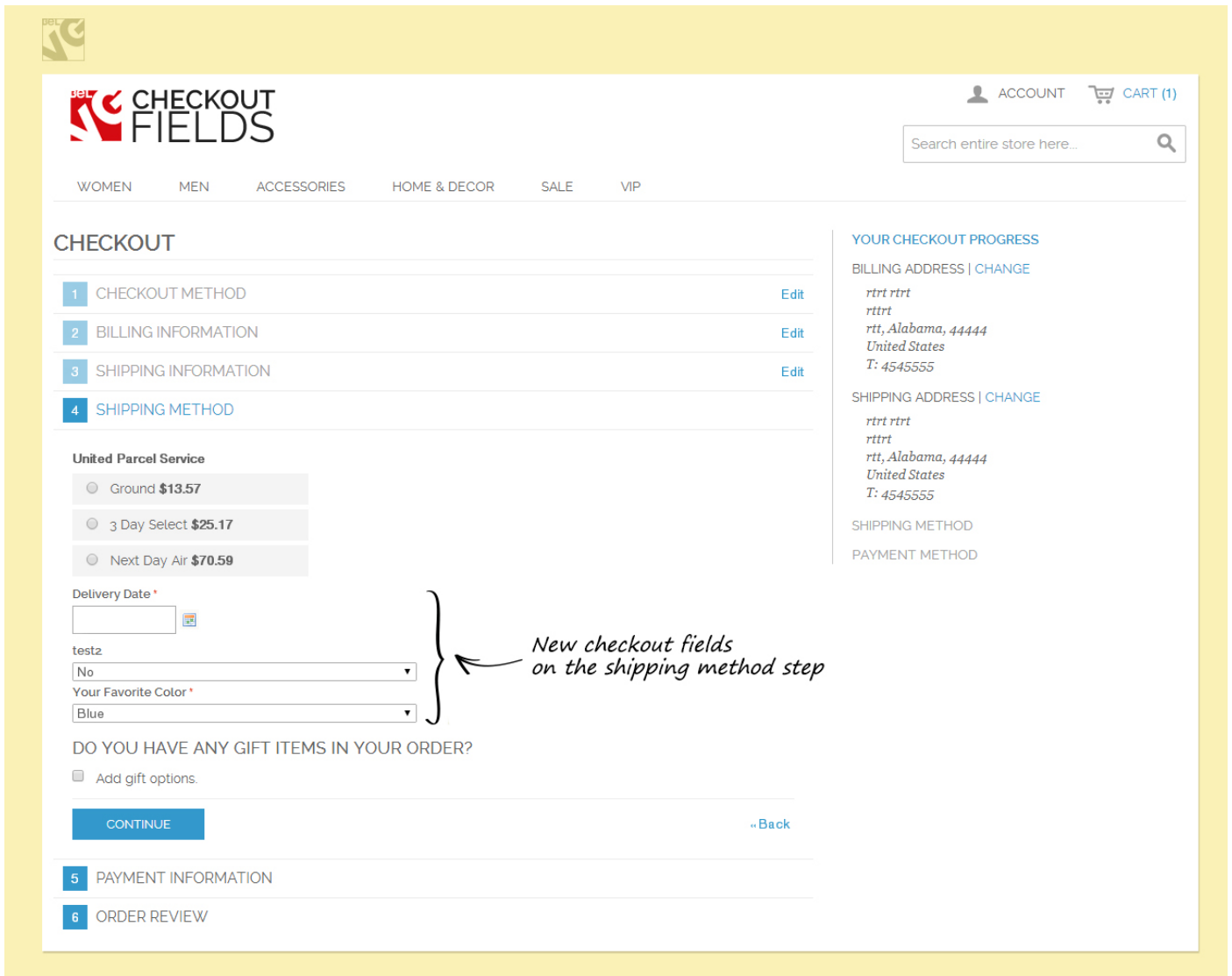
3 SHIPPING INFORMATION

4 SHIPPING METHOD

5 PAYMENT INFORMATION

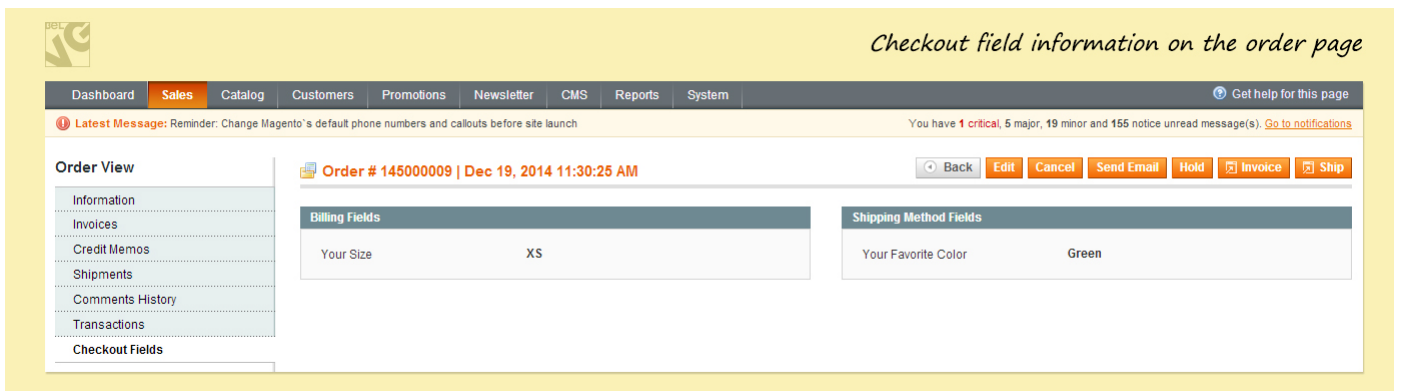
6 ORDER REVIEW

New checkout field on the billing information step



The screenshot shows the 'CHECKOUT FIELDS' page for a user. The page has a yellow header with the BELVG logo and navigation links: WOMEN, MEN, ACCESSORIES, HOME & DECOR, SALE, and VIP. The main content area is titled 'CHECKOUT' and contains a list of steps: 1. CHECKOUT METHOD, 2. BILLING INFORMATION, 3. SHIPPING INFORMATION, and 4. SHIPPING METHOD. The 'SHIPPING METHOD' step is selected and expanded, showing three options: Ground \$13.57, 3 Day Select \$25.17, and Next Day Air \$70.59. Below the shipping methods, there are fields for 'Delivery Date *', 'test2' (a dropdown menu), and 'Your Favorite Color *' (a dropdown menu). A handwritten note with an arrow points to these three fields, stating 'New checkout fields on the shipping method step'. At the bottom of the shipping method section, there is a checkbox for 'Add gift options.' and a 'CONTINUE' button. To the right of the shipping method section, there is a 'YOUR CHECKOUT PROGRESS' section with links for 'BILLING ADDRESS | CHANGE', 'SHIPPING ADDRESS | CHANGE', 'SHIPPING METHOD', and 'PAYMENT METHOD'. The 'BILLING ADDRESS' and 'SHIPPING ADDRESS' sections show placeholder text: 'rtrt rtrt', 'rttt', 'rtt, Alabama, 44444', 'United States', and 'T: 4545555'.

Admin can also view all the information on the order page in the checkout fields tab.



The screenshot shows the 'Order View' page in the BELVG Admin interface. The page has a yellow header with the BELVG logo and a navigation bar with links: Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System. The 'Sales' link is highlighted. Below the navigation bar, there is a 'Latest Message' section with a reminder to change Magento's default phone numbers and callouts before site launch. The main content area is titled 'Order View' and shows the order details for 'Order # 14500009 | Dec 19, 2014 11:30:25 AM'. The order is in the 'Shipping' status. The page is divided into two main sections: 'Billing Fields' and 'Shipping Method Fields'. The 'Billing Fields' section shows 'Your Size' as 'XS'. The 'Shipping Method Fields' section shows 'Your Favorite Color' as 'Green'. On the left side of the page, there is a sidebar with a list of tabs: Information, Invoices, Credit Memos, Shipments, Comments History, Transactions, and Checkout Fields. The 'Checkout Fields' tab is selected.









Do you have questions about extension configurations?

[Contact us](#) and we will help you in a moment.



Our Office: *M. Bogdanovicha 130, Minsk, Belarus*

We look forward to your feedback. Comments, opinions and suggestions are largely appreciated. Read our **blog** and follow us on [Facebook](#), [Twitter](#), [Google+](#) and [LinkedIn](#) to know BelVG latest news, analytics and discount offers. See you online!

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	Facebook page	http://facebook.com/BelVGcom		In page	http://linkedin.com/company/belvg
	Twitter page	http://twitter.com/BelVG_com		Skype	store.belvg
	E-mail	store@belvg.com		Phone	US: +1 650 924 9963