Customer Documents Documentation

Complete PDF Manual

Guide for Magento administrators, technical project owners, and implementation teams.

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EXTENSION
Magento 2 Extension Customer Documents

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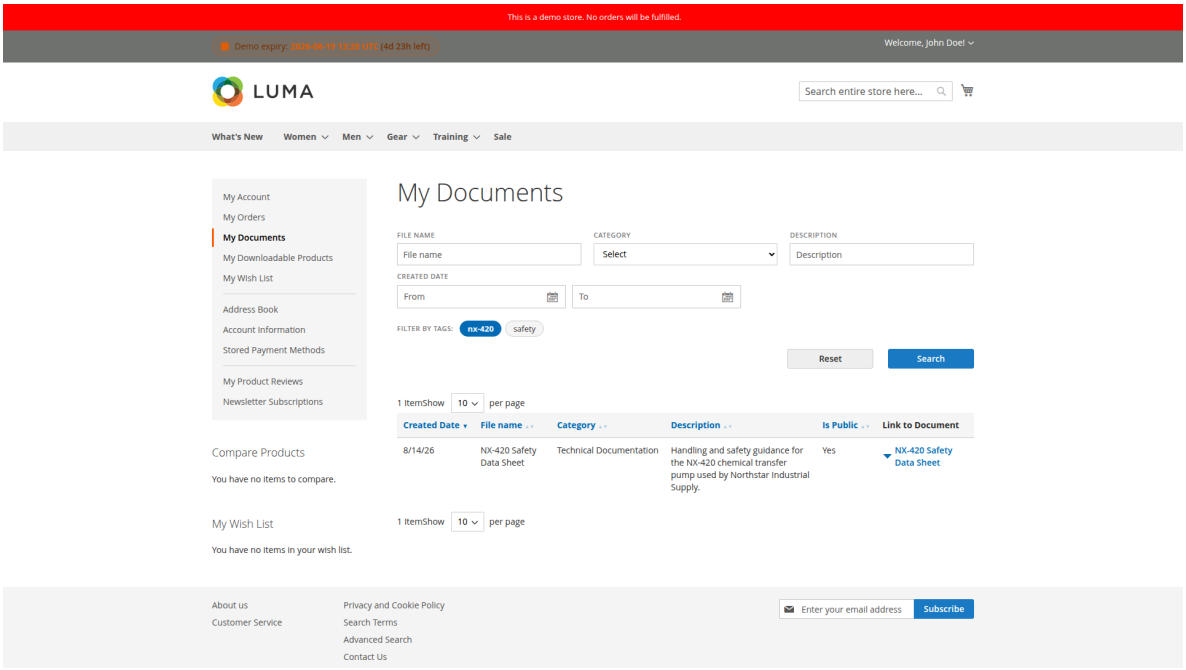
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Customer Documents

Customer Documents gives each buyer a controlled document library inside Magento. Administrators can upload a file or link to an approved external host, choose who may access it, set a validity period and track downloads.

Typical documents include contracts, certificates, safety data sheets, price agreements, invoices and product manuals.

The customer account provides a searchable **My Documents** area. Buyers can narrow the list by file details, dates, categories or tags and then open an eligible document from the result row.



How access is decided

A document can be available through one or more of these paths:

- direct assignment to a customer
- assignment to a customer group
- public access
- assignment to products for storefront product or cart presentation
- linking to an order, invoice, shipment or credit memo

Website scope, validity dates, password protection and download limits are checked in addition to the assignment. Marking a document public does not bypass those checks.

Where documents appear

- `Customers > Customer Documents` in Magento Admin

- **My Documents** in the customer account
- an optional customer-account sidebar block
- product pages for assigned product documents
- customer order, invoice, shipment and credit memo views for linked documents
- an optional ZIP download for eligible customer or cart documents

Start here

1. Install Customer Documents.
2. Configure storage, display and security.
3. Review admin permissions.
4. Create a document and assign its audience.
5. Test the result as the intended customer in the correct website and store view.

Feature guides

- Access Control
- Downloads and Security
- Categories
- Tags
- Product Assignments
- Product Page Documents
- ZIP Downloads
- Email Notifications
- Automatic Entity Linking
- Background Jobs

For common questions and diagnosis, see the FAQ and Troubleshooting guides.

Optional packages

- REST API for administrator or integration-token management
- GraphQL for customer-facing document queries and download preparation
- CSV Import/Export for Magento Import/Export and command-line imports
- Hyvä Compatibility
- Sample Data for non-production evaluation

See the Add-ons overview for the package names and intended use of each optional component.

View the product page

Installation

Make sure the SoftwareSilo Composer repository is configured and create a current backup or deployment rollback point.

Install the package

Replace `repo.softwaresilo.io`, `softwaresilo`, `https://repo.softwaresilo.io/` and `<token>` with the repository details shown under **Account > Licenses** in your SoftwareSilo account — see Installation & Updates.

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/customerdocuments:*
```

Enable the module and apply setup changes:

```
php bin/magento module:enable MageB2B_ExtensionManager
MageB2B_CustomerDocuments
php bin/magento setup:upgrade
```

Production-mode stores normally require dependency injection compilation and static-content deployment. Follow your normal release process, then clear the Magento cache.

Verify the installation

```
php bin/magento module:status MageB2B_CustomerDocuments
```

The module should be enabled, and `Customers > Customer Documents` should appear for an admin role with the required permission.

Before uploading real files, continue with Configuration, especially the upload path, allowed file extensions, external-domain allowlist and frontend settings.

Uninstall

The module provides an uninstall routine that removes its EAV entity type and drops all `customer_document*` tables:

```
php bin/magento module:uninstall MageB2B_CustomerDocuments
```

This permanently deletes all documents, assignments, categories, tags, download reports and notification records. Take a database backup first, and remove the uploaded files

below the configured media upload path separately if they are no longer needed.

Configuration

Open `Stores > Configuration > MageB2B > Customer Documents`. Select the intended website or store-view scope before saving.

Frontend and storage

- **Enabled at frontend** controls customer-facing document areas.
- **Enable at sidebar** adds the optional sidebar block.
- **Enable head link** adds the My Documents account link.
- **Upload path** is a folder below `pub/media`. If it changes, the extension attempts to move existing local files and logs warnings for missing files.
- **Allowed Extensions** limits local upload types.
- **Maximum Upload File Size** adds a module limit. PHP and web-server upload limits still apply.
- **Obscure Filename** replaces the original filename presented during download.

For external documents, set **Allowed External Domains** to a comma- or newline-separated list of trusted hostnames. Leaving this list empty permits every external domain and is not suitable for a controlled production setup.

Customer presentation

Choose whether My Documents is grouped by category and which columns are visible. Product documents can use a flat or category-based presentation. Document names and password notices can also be shown or hidden.

Enable customer ZIP or cart-document ZIP downloads only after reviewing which files are eligible. Password-protected and external documents are not included in bulk ZIP downloads.

Email notifications

Choose the sender identity, template and optional CC or BCC recipients. Local files can be attached when attachment delivery is enabled and the file is within the configured email attachment limit. Large files are better delivered through the protected download link.

See Email Notifications.

Search

Select the document fields customers can search in My Documents. Use names, categories and descriptions consistently so search results are useful.

Automatic linking

Automatic linking matches uploaded filenames to configured order, invoice or shipment patterns during the daily linking job. Enable it only after testing the pattern against known entity numbers.

See Automatic Entity Linking.

Cleanup settings

- **Delete Missing Files** allows the daily cleanup to remove local-document records whose files no longer exist.
- **Delete notifications after X days** controls retention of pending, sent and failed notification records.

Back up the database and document storage before enabling deletion. Review Background Jobs and monitor the first run.

Admin Permissions (ACL)

Customer Documents registers ACL resources so you can delegate document administration to specific roles.

Where To Configure

In Magento Admin:

- **System > Permissions > User Roles**

Admin Menu Mapping

The module adds a “Customer Documents” menu under `Customers` and protects each area with ACL:

Admin Menu	Required ACL
`Customers > Customer Documents > All Documents`	`MageB2B_CustomerDocuments::manage`
Create/update documents	`MageB2B_CustomerDocuments::save`
Delete documents	`MageB2B_CustomerDocuments::delete`
`Customers > Customer Documents > All Document Categories`	`MageB2B_CustomerDocuments::category_manage`
Create/update categories	`MageB2B_CustomerDocuments::category_save`
Delete categories	`MageB2B_CustomerDocuments::category_delete`
`Customers > Customer Documents > All Document Tags`	`MageB2B_CustomerDocuments::tag_manage`
Create/update tags	`MageB2B_CustomerDocuments::tag_save`
Delete tags	`MageB2B_CustomerDocuments::tag_delete`
`Customers > Customer Documents > Download Report`	`MageB2B_CustomerDocuments::download_report`

Admin Menu	Required ACL
`Customers > Customer Documents > E-Mail Notification`	`MageB2B_CustomerDocuments::email_notification`
Config section	`MageB2B_CustomerDocuments::config`

Note For API Integrations

The REST API Add-on uses these same ACL resources for admin and integration tokens. For example:

- read-only integrations should have `MageB2B_CustomerDocuments::manage`
- write integrations need `::save` (and optionally `::delete`)

Background Jobs

Customer Documents relies on Magento cron for notifications, entity links and cleanup.

Job	Schedule	Purpose
`send_document_notification`	Every 30 minutes	Sends queued document notification emails
`link_customer_documents`	Daily at 03:00	Links matching files to configured entities
`delete_missing_files`	Daily at 04:00	Removes records for missing local files when enabled
`customerdocuments_cleanup_old_notifications`	Daily at 05:00	Removes notification records older than the configured retention period

Operational checks

Make sure Magento cron is running under the same release and filesystem context that can read the configured document directory.

If notifications remain pending, inspect the cron status, Magento logs and mail transport. If entity documents are not linked, confirm the filename pattern and wait for or run the linking schedule through your normal operations process.

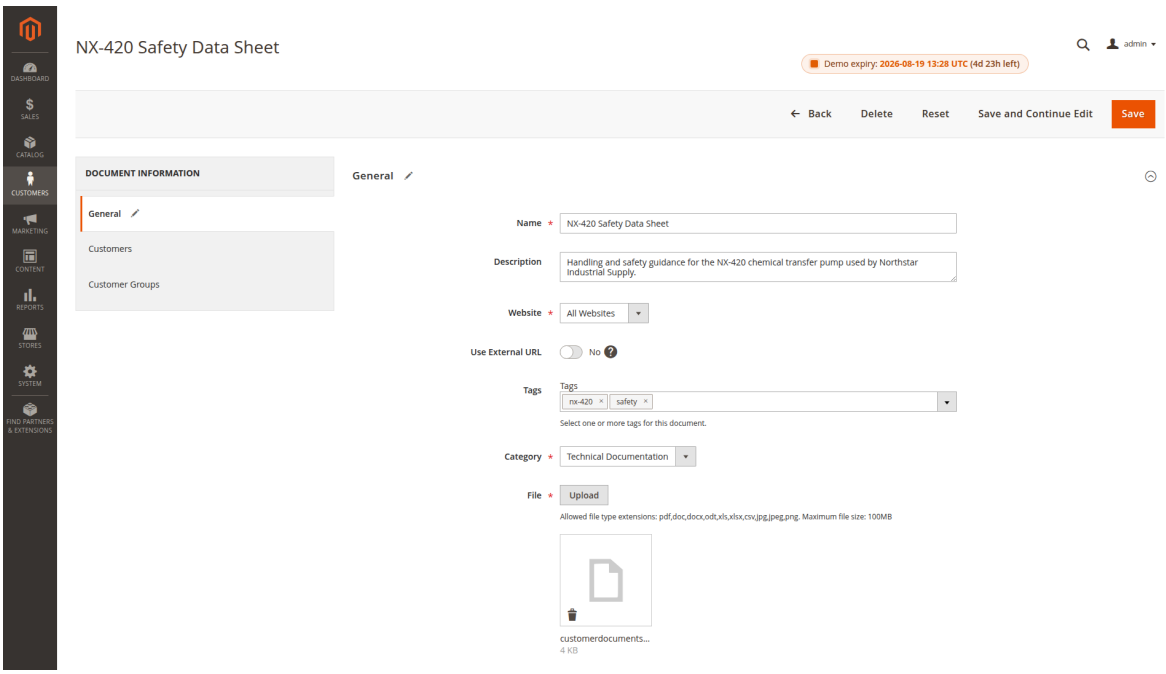
Before enabling missing-file deletion, back up both the database and the document directory. Test with a non-production record so the team understands what the cleanup removes.

Access Control

Create or edit a document under `Customers > Customer Documents > All Documents`. The audience is built from customer assignments, customer-group assignments and the public setting.

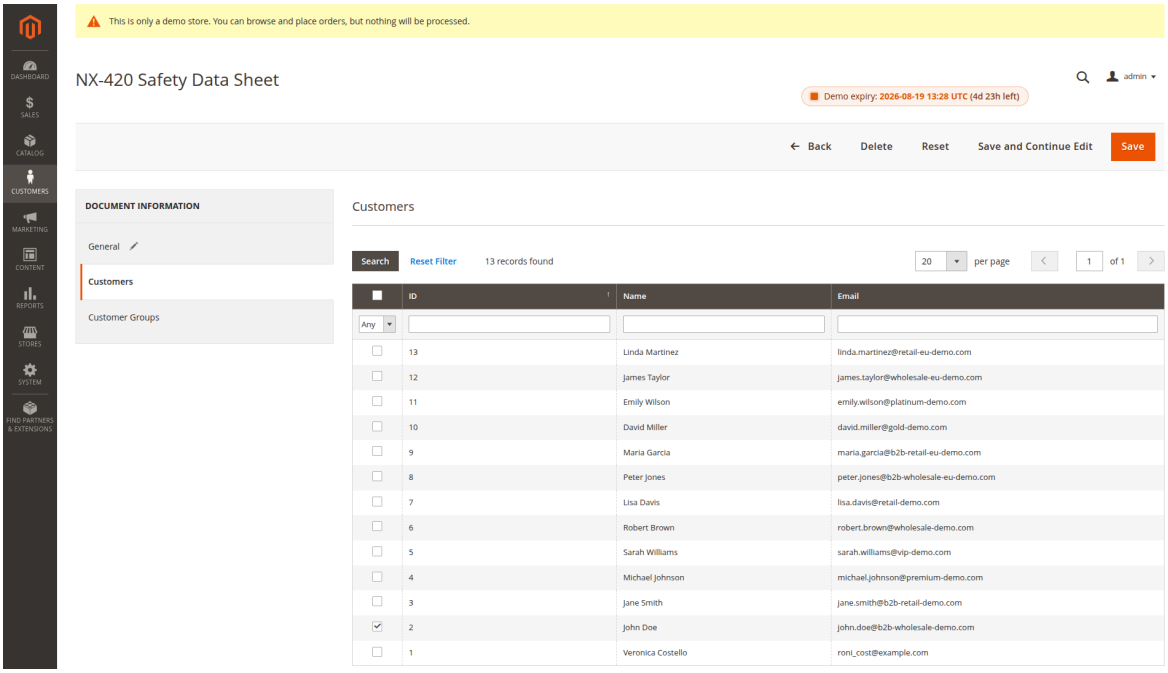
The document form keeps the file, description, website, category and tags together. Complete those fields before assigning an audience so the customer sees useful context rather than only a filename.

The document grid offers mass actions for selected rows: **Send Email** queues a notification for the assigned customers without reopening each document, and **Delete** removes the selected documents.



Private documents

For a customer-specific file, leave **Public** disabled and assign one or more customers. Use customer groups when everyone in a group should receive the same document. A document can have both direct and group assignments.



Public documents

A public document can be reached without a customer login. Public status does not override the document's website, validity, password or download-limit rules.

Every saved public document has a stable download URL that works for anyone, including visitors who are not signed in:

```
https://<your-store>/customerdocuments/download/file?id=<document_id>
https://<your-store>/customerdocuments/download/file?id=<document_id>&password=<password>
```

Once a document is saved and **Is Public** is enabled, the document form shows a ready-to-copy **Public URL** field. When password protection is enabled on the document, the field includes the `password` parameter automatically.

Use public access only for material that is genuinely safe to share. Product manuals are a common example; contracts and customer-specific price files normally are not.

Documents on the customer record

The admin customer edit page contains a **Documents** section that lists every document assigned to that customer — both direct customer assignments and assignments through the customer's group, limited to the customer's website scope. The grid supports filters, full-text search and CSV/Excel export, which makes it practical for auditing what a specific account can download without opening each document.

Additional checks

Every download can also depend on:

- website scope
- **Valid From** and **Valid To** dates
- password protection
- the maximum number of downloads
- a valid local file or approved external URL

These controls complement the audience assignment. They do not replace it.

A reliable setup sequence

1. Choose the website scope.
2. Upload a local file or enter an approved external URL.
3. Decide whether the document is private or public.
4. Assign customers or customer groups for private access.
5. Add validity, password and download limits where required.
6. Save the document and test it as an intended customer.
7. Test a second, unassigned customer to confirm that access is denied.

For product-specific presentation, continue with Product Assignments.

Document Categories

Categories give documents a stable business structure such as Contracts, Certificates, Invoices or Product Manuals.

Manage them under `Customers > Customer Documents > All Document Categories`, then select a category in the document form.

Enable **Show Documents per Category** if My Documents should display grouped sections. Without that setting, the category can still appear as a column and search field when those options are enabled.

Choose category names customers already understand and avoid near-duplicates such as “Certificate” and “Certificates”. Before deleting a category, review the documents that use it and move them to the intended replacement.

Document Tags

Tags provide a second, more flexible way to find documents. A category might describe the document type, while tags can describe a project, year, region or subject.

Manage tags under `Customers > Customer Documents > All Document Tags` and assign them in the document form. Customers can use them to narrow the My Documents list.

Keep the vocabulary short and consistent. For example, use one agreed tag such as `safety-data` rather than creating several spelling variations. Tags are also supported by the Import/Export package.

Downloads and Security

Customer Documents serves local files through controlled download actions and redirects eligible external documents only after validation. Avoid linking directly to files in the media directory.

Local files

The configured upload path sits below `pub/media`. Allow only the file types the business needs and set a sensible upload-size limit. Web-server and PHP limits still apply.

Protect the upload folder from direct public browsing in the web-server configuration. A copied media URL should not bypass Customer Documents access checks.

External documents

External URLs are useful when files live in an approved document service. Configure **Allowed External Domains** with the exact trusted hostnames. An empty allowlist permits every domain, so it should not be used for a controlled production setup.

Only HTTP and HTTPS links should be used. The extension validates the external host before saving or redirecting.

Checks performed for a download

- customer or public access
- website scope
- validity dates
- password, when present
- download allowance
- local file availability or approved external destination

A failed check does not provide a valid file response. Successful downloads are recorded for reporting, and counters are updated only after an allowed response is prepared.

Download rate limit

The download endpoint allows five successful downloads per document and hour. The counter is tracked per document for each signed-in customer; guests are tracked by a hashed IP address. Once the limit is reached, further attempts return "Download limit exceeded. Please try again later." until the one-hour window expires.

Only requests that actually serve a file or an approved redirect count against the limit. The limit is fixed and cannot be configured; it applies on top of the separate per-document **Max. Downloads** allowance.

Signed download links

The `downloadCustomerDocument` GraphQL mutation returns a signed download URL that is valid for 30 minutes and works without a customer session — anyone holding the link can use it within that window. See GraphQL.

Download Report

Every recorded download appears under **Customers > Customer Documents > Download Report** with the document, customer, time and result. Use the grid to audit who downloaded a sensitive file. Its **Delete** mass action removes report rows — deleting a report row never touches the document itself.

Filenames

Enable **Obscure Filename** when customers should not receive the stored filename. This reduces accidental information exposure in downloaded filenames but does not replace access control.

Bulk downloads

ZIP downloads exclude password-protected and external documents. See ZIP Downloads.

For sensitive files, combine a private audience with a short validity period and, where appropriate, a password or download limit. Test the complete path using a customer account rather than only an administrator session.

Password Protection

A document password adds a second check before download. It is useful when the recipient should confirm a separately shared secret, but it should be combined with the correct customer or group assignment for private material.

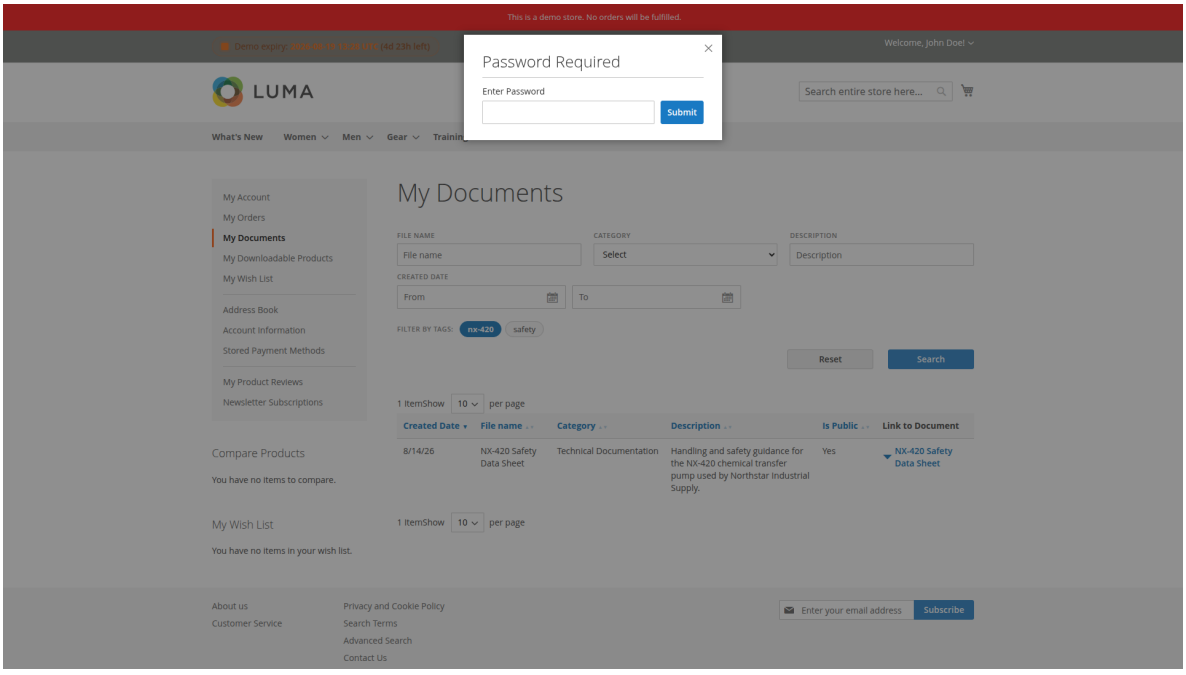
Configure a password

1. Open `Customers > Customer Documents > All Documents`.
2. Create or edit a document.
3. Enter a password in the document form.
4. Save and test the download as the intended customer.

Passwords are case-sensitive and the field accepts up to 20 characters. Share the password through a separate, appropriate channel. Do not place it in the same public page or message as the document link.

Customer experience

The customer selects the document and enters the password in the prompt. The file is released only after the password and the normal document access rules pass.



An optional frontend notice can indicate that a document is password-protected. It does not reveal the password.

Bulk downloads

Password-protected documents are excluded from customer and cart ZIP downloads. The

buyer must download them individually and complete the password check.

If a valid password is rejected, confirm that the document was saved, check letter case and retry from a fresh customer session. Also verify the document's website, validity period and download allowance.

Product Assignments

Product assignments connect files such as manuals, certificates and data sheets to catalog items. The assignment is store-scoped, so the same product can expose different documents in different storefronts.

From the product

Open a product in Magento Admin and use its Customer Documents section to select documents for the current store view. Save the product after confirming the selection.

What customers see

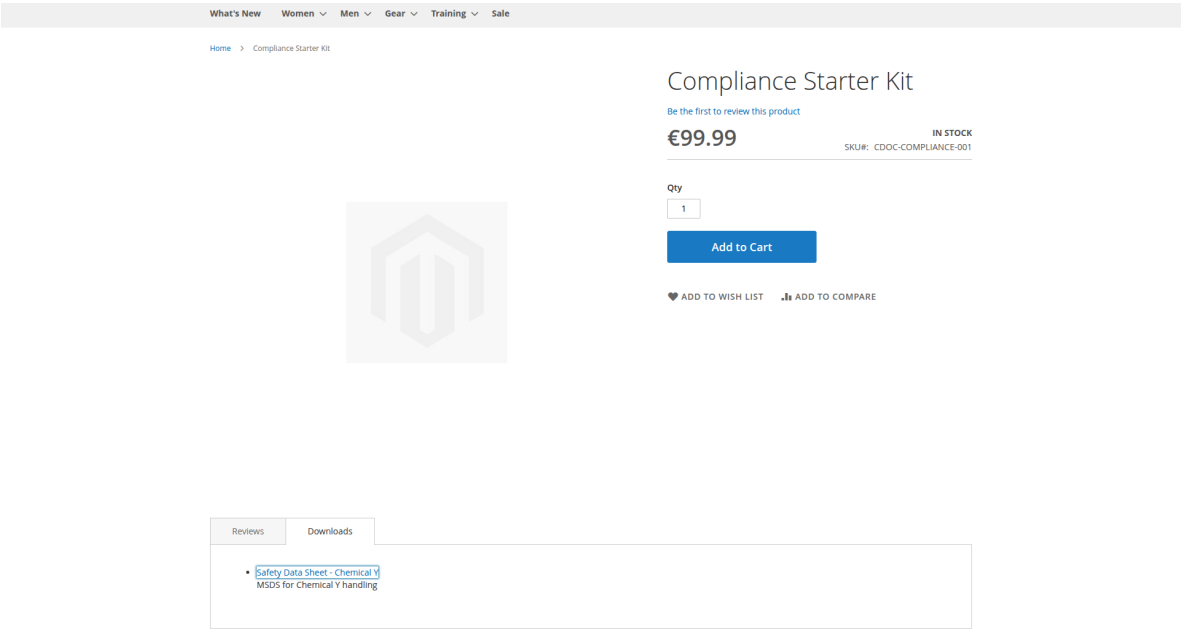
Eligible documents can appear on the product page, depending on **Product Documents View Mode**. The optional cart ZIP can also collect eligible local documents assigned to products in the current cart.

Product assignment does not make every document public. Customer access, website scope, validity, passwords and download limits still apply.

If a document is missing from one storefront, check the product assignment's store scope first. A default-scope assignment may be used as a fallback when there is no assignment for the active store.

Product Page Documents

Documents assigned to a product can appear on its storefront page. Use this for files buyers need before or after purchase, such as technical specifications, certificates and operating instructions.



Choose the presentation under **Product Documents View Mode**:

- **Flat** shows one document list.
- **Category-based** groups the available documents by category.

The active store view and customer context determine the final list. A product assignment alone does not bypass document audience, website, validity, password or download-limit rules.

When testing, open the product as an assigned customer and as an unassigned customer. Also check each store view that has a separate product-document assignment.

Sidebar Documents

Enable **Enable at sidebar** to render the Customer Documents block in Magento's `sidebar.additional` area. A document must also have **Show in Sidebar** enabled and be accessible to the current customer.

The exact position depends on the active theme and page layout. Test the block on the pages where your theme renders the additional sidebar. If the theme does not provide that layout area, the setting cannot create one on its own.

Use the sidebar for a small set of timely documents. The full searchable library remains available in My Documents.

ZIP Downloads

Customer Documents can offer one ZIP file containing several eligible local documents.

Customer document ZIP

Enable **Enable ZIP Download** to show the bulk action in My Documents. The archive contains documents the current customer may access at that moment.

Cart document ZIP

Enable **Enable Cart Document ZIP Download** to collect eligible documents assigned to products in the current cart. Product assignment and store scope still apply.

Exclusions

The archive does not include:

- password-protected documents
- external URLs
- documents outside their validity period or website scope
- documents the customer cannot access
- missing local files

Password-protected files must be downloaded individually. External documents remain links to their approved destination.

Large archives require memory, temporary disk space and response time. Test the expected number and size of files with production-like limits before enabling ZIP downloads for customers.

Email Notifications

Customer Documents can queue an email when a document is saved for customers. The queue is processed every 30 minutes, and each record is tracked as pending, sent or failed.

Configure delivery

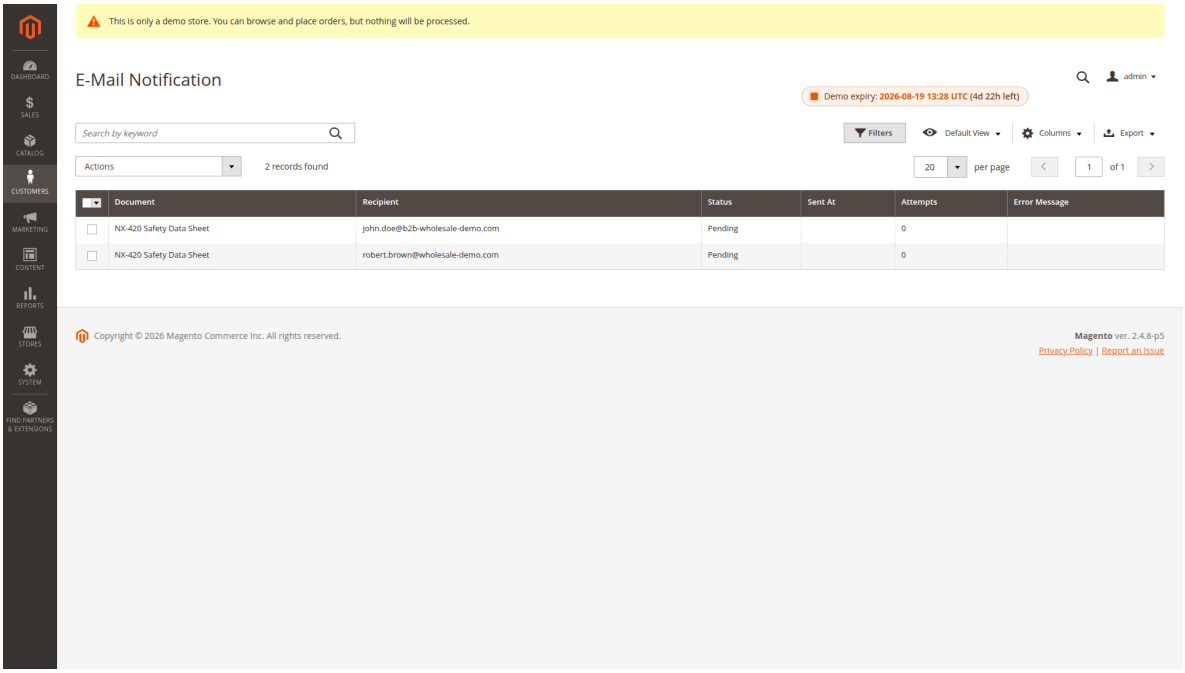
Under `Stores > Configuration > MageB2B > Customer Documents > Email Settings`, choose:

- the Magento sender identity
- the notification email template
- optional CC and BCC recipients, separated with semicolons
- whether the local document file should be attached

Set **Maximum Email Attachment Size** to keep oversized files out of the message. When a file is not attached, the customer can still use the protected download path described by the template. External documents are links and are not attached as local files.

Queue a notification

Enable the document's email option and assign the intended customers. Save the document, then check `Customers > Customer Documents > E-Mail Notification` for its queue state.



Group assignment can create notifications for several customers, so test the audience before enabling email on a widely assigned document.

Troubleshooting

If a notification remains pending, confirm Magento cron and the mail transport. For failed records, inspect the error and Magento logs, correct the cause, then select the rows in the notification grid and use the **Resend** mass action. **Delete** removes records you no longer want to retry.

If the message arrives without an expected attachment, check that the document is a readable local file, attachment delivery is enabled and the file is within the configured size limit.

Use a dedicated template that clearly names the document and tells the customer where to find it. Do not include document passwords in the same email as the download link.

Automatic Entity Linking

Customer Documents can link files to orders, invoices, shipments and credit memos by matching their filenames to configured entity patterns. Linked files then appear in the corresponding customer sales view.

Configure a pattern

Open `Stores > Configuration > MageB2B > Customer Documents > Link Documents`.

1. Enable automatic linking.
2. Add a pattern for the entity type — the configuration placeholder shows the concrete syntax, for example `order-{increment_id}.pdf` matches `order-000000123.pdf` to order 000000123.
3. Decide whether customers should see a message when an entity has no linked documents.
4. Upload files whose names follow the pattern.
5. Test with one known entity before processing a larger file set.

The daily `link_customer_documents` job performs the matching at 03:00. The file must already exist as a Customer Documents record and its name must match the configured result.

Access still applies

A link controls where the document is presented. Website scope, customer access, validity, password and download limits still govern the download.

If a link is missing

- Compare the stored filename with the exact pattern result.
- Confirm the correct entity type and increment value.
- Check that Magento cron completed the linking job.
- Review Magento logs for matching or repository errors.
- Test access as the customer who owns the order, invoice, shipment or credit memo.

Use Background Jobs for the schedule overview.

Add-Ons

Optional packages extend Customer Documents for integrations, bulk data transfer, headless storefronts and development environments. Install only the packages required by the store.

Add-on	Purpose	Package
REST API	Manage documents and assignments through Magento service contracts	`mageb2b/customerdocuments-api`
CSV Import/Export	Transfer document metadata through Magento Import/Export or the command line	`mageb2b/customerdocuments-importexport`
GraphQL	Query and prepare customer-visible documents in a headless storefront	`mageb2b/customerdocuments-graph-ql`
Hyvä Compatibility	Provide Customer Documents storefront templates for Hyvä themes	`mageb2b/customerdocuments-hyva`
Sample Data	Add disposable example records for development and evaluation	`mageb2b/customerdocuments-sample-data`

Each add-on has one guide. Use the section links in **On this page** for installation, configuration and workflow details without adding another navigation level.

REST API

The optional `mageb2b/customerdocuments-api` package exposes administrator-level service contracts for document management and assignments. It is not a customer self-service API.

- Composer package: `mageb2b/customerdocuments-api`
- Magento module: `MageB2B_CustomerDocumentsApi`

Installation

Install the API package in addition to the base Customer Documents extension:

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/customerdocuments-api:*
php bin/magento module:enable MageB2B_CustomerDocumentsApi
php bin/magento setup:upgrade
php bin/magento cache:flush
```

The add-on reuses the base module ACL resources:

- read: `MageB2B_CustomerDocuments::manage`
- write: `MageB2B_CustomerDocuments::save`
- delete: `MageB2B_CustomerDocuments::delete`

Assign only the permissions needed by the integration. See Admin permissions and Magento's `/swagger` page for the schema generated by the installed version.

Authentication

Use a Magento integration or administrator bearer token with the smallest Customer Documents ACL scope needed for the operation. A dedicated integration is preferable to sharing an administrator login.

```
curl -X POST
"https://your-store.com/rest/V1/integration/admin/token" \
  -H "Content-Type: application/json" \
  -d '{"username":"admin","password":"***"}'
```

Then call endpoints with:

```
-H "Authorization: Bearer <ADMIN_TOKEN>"
```

Endpoint Overview

Documents

Method	URL
GET	`/V1/customerdocuments/:id`
GET	`/V1/customerdocuments/search`
POST	`/V1/customerdocuments`
PUT	`/V1/customerdocuments/:id`
DELETE	`/V1/customerdocuments/:id`

Document files

Method	URL
GET	`/V1/customerdocuments/:documentId/file`
PUT	`/V1/customerdocuments/:documentId/file`

These operations read or write base64-encoded local document data. External documents do not expose a local file payload.

Customer Assignments

Method	URL
GET	`/V1/customerdocuments/customer/:id`
GET	`/V1/customerdocuments/customer/search`
POST	`/V1/customerdocuments/customer`
PUT	`/V1/customerdocuments/customer/:id`
DELETE	`/V1/customerdocuments/customer/:id`

Customer Group Assignments

Method	URL
GET	`/V1/customerdocuments/customergroup/:id`
GET	`/V1/customerdocuments/customergroup/search`

Method	URL
POST	`/V1/customerdocuments/customergroup`
PUT	`/V1/customerdocuments/customergroup/:id`
DELETE	`/V1/customerdocuments/customergroup/:id`

Product Assignments

Method	URL
GET	`/V1/customerdocuments/product/:id`
GET	`/V1/customerdocuments/product/search`
POST	`/V1/customerdocuments/product`
PUT	`/V1/customerdocuments/product/:id`
DELETE	`/V1/customerdocuments/product/:id`
DELETE	`/V1/customerdocuments/product/by-product/:productId`
DELETE	`/V1/customerdocuments/product/by-document/:documentId`

Categories

Method	URL
GET	`/V1/customerdocuments/category/:id`
GET	`/V1/customerdocuments/category/search`
POST	`/V1/customerdocuments/category`
PUT	`/V1/customerdocuments/category/:id`
DELETE	`/V1/customerdocuments/category/:id`

Links

Method	URL
GET	`/V1/customerdocuments/links`
POST	`/V1/customerdocuments/links`
DELETE	`/V1/customerdocuments/links/:id`

Request payloads

General notes

- `GET` and `DELETE` routes do not require a request body.
- `.../search` routes use standard Magento `searchCriteria` query parameters.

Example:

```
/V1/customerdocuments/product/search?searchCriteria[filter_groups][0][filters][0][field]=document_id&searchCriteria[filter_groups][0][filters][0][value]=1777&searchCriteria[filter_groups][0][filters][0][condition_type]=eq&searchCriteria[currentPage]=1&searchCriteria[pageSize]=20
```

Save a document

```
{
  "document": {
    "id": 1777,
    "name": "Invoice 1001",
    "description": "January invoice",
    "is_external": 1,
    "external_url": "https://example.com/invoice-1001.pdf",
    "is_public": 0,
    "category_id": 829,
    "website_id": 0,
    "show_in_sidebar": 1,
    "valid_from": "2026-01-01",
    "valid_to": "2026-12-31",
    "customer_ids": [4801],
    "customer_group_ids": [1, 3]
  }
}
```

For a local document, save its metadata with `is_external` set to `0`, then use the file endpoint with the `documentFile` wrapper expected by Magento's service contract. The payload contains a base filename and base64 data. Apply the same allowed-extension, file-size and storage policies used by the Admin upload flow.

POST/PUT `/V1/customerdocuments/customer` (wrapper: `documentCustomer`)

```
{
  "documentCustomer": {
```

```
    "id": 4099,
    "document_id": 1777,
    "customer_id": 4801
  }
}
```

POST/PUT `/V1/customerdocuments/customergroup` (wrapper: `customerGroup`)

This service contract uses `customerGroup`, while the other assignment endpoints use wrappers beginning with `document`. Keep the wrapper exactly as shown; changing it to `documentCustomerGroup` causes Magento to reject the request payload.

```
{
  "customerGroup": {
    "id": 3196,
    "document_id": 1777,
    "customer_group_id": 3
  }
}
```

POST/PUT `/V1/customerdocuments/product` (wrapper: `documentProduct`)

```
{
  "documentProduct": {
    "id": 385,
    "document_id": 1777,
    "product_id": 43432,
    "store_id": 0,
    "position": 10
  }
}
```

POST/PUT `/V1/customerdocuments/category` (wrapper: `documentCategory`)

```
{
  "documentCategory": {
    "id": 829,
    "name": "Security Policies"
  }
}
```

POST `/V1/customerdocuments/links` (wrapper: `documentLink`)

```
{
  "documentLink": {
    "id": 1,
    "customer_document_id": 1777,
    "link_entity_type": "order",
    "link_entity_id": 4801
  }
}
```

`link_entity_type` accepts `order`, `invoice`, `shipment` or `creditmemo`; `link_entity_id` is the internal ID of that sales entity.

Search and error handling

Search endpoints use Magento `searchCriteria`, including pagination and filter groups. Treat assignment IDs as relation-record IDs, not customer, group or product IDs.

Common HTTP outcomes are:

Code	Meaning
200	Request accepted/successful
400	Payload parsing/validation error
401	Unauthorized
403	ACL denied
404	Entity does not exist
500	Service or runtime error

Validate one create, read, update and delete cycle in a non-production environment before automating bulk changes. An API write can change the same customer-visible access relationships as the Magento Admin form.

CSV Import/Export

The CSV Import/Export add-on integrates Customer Documents with Magento's standard **Import** and **Export** screens. It also provides a command-line importer for repeatable data transfers.

- Composer package: `mageb2b/customerdocuments-importexport`
- Magento module: `MageB2B_CustomerDocumentsImportExport`
- Import and export entity: **Customer Documents**
- CLI command: `customerdocuments:import-customerdocuments`

Installation

Install the add-on in addition to the base Customer Documents extension:

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/customerdocuments-importexport:*
php bin/magento module:enable
MageB2B_CustomerDocumentsImportExport
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Production-mode stores normally also require dependency injection compilation and static-content deployment. Follow the store's normal release process.

Verify the installation

1. Open **System > Data Transfer > Export** and confirm that **Customer Documents** is available as an entity.
2. Open **System > Data Transfer > Import** and confirm the same entity is available.
3. Download the sample CSV from the Import screen.
4. Validate a small representative file before planning a bulk transfer.

Export documents

The export contains document metadata and its portable assignment values. It does not bundle the actual document files.

1. Go to **System > Data Transfer > Export**.
2. Select **Customer Documents** as the entity type.
3. Apply any required filters.
4. Click **Continue** and download the generated CSV.

The file includes document properties, customer emails, customer-group codes, category names, tags and product assignments. Product assignments use `sku@store_code@position` entries separated by `|`. Use stored paths to locate local files under `pub/media/`.

Import documents

Prepare the source file

Start with an export or the sample file from the installed module version. For a new local document, `path` must reference a real file relative to the Magento root, for example:

```
var/import/customerdocuments/northstar-safety-certificate.pdf
```

The importer copies that file into the configured Customer Documents upload folder and stores the resulting document path. When `id` identifies an existing document, `path` is optional, so metadata and assignments can be updated without uploading the file again.

Import through Magento Admin

1. Go to **System > Data Transfer > Import**.
2. Select **Customer Documents** as the entity type.
3. Choose the import behavior and upload the CSV.
4. Click **Check Data** and resolve every reported validation error.
5. Run the import and review the resulting documents and assignments.

Import through the command line

```
php bin/magento customerdocuments:import-customerdocuments \
  var/import/customer-documents.csv \
  --behavior=append \
  --delete_file_after_import=0
```

Run the command as the operating-system user used for other Magento commands. Keeping `--delete_file_after_import=0` is safer while a feed is being developed because the command deletes a successfully imported source file by default.

Import behaviors

Behavior	Purpose
`append` or `add_update`	Create records without an `id` and update existing records identified by `id`
`replace`	Delete records identified by `id` and import their replacement rows

Behavior	Purpose
`delete`	Delete records identified by `id`

Test `replace` and `delete` only in a recoverable non-production environment before using them with business documents.

Validation rules

The importer checks:

- required values such as `name`, `description` and the `path` of a new local document;
- whether customer emails and customer-group codes exist;
- whether the named category exists;
- product assignment syntax;
- whether a referenced local file exists;
- whether its extension is allowed by `customerdocuments/general/allowed_extensions`.

CSV format

Use UTF-8 with LF or CRLF line endings. The default delimiter is a comma and values may use double-quote enclosure.

```
"name","description","password","path","is_public","max_downloads","customer_group_ids","customer_ids","created_at","category_id","show_in_sidebar","valid_from","valid_to","send_email","tags","product_links"
"Northstar Safety Certificate","Certificate for approved equipment","","var/import/customerdocuments/northstar-safety-certificate.pdf","0","0","Wholesale","purchasing@northstar-industrial.example","","Certificates","0","2026-01-01","2026-12-31","1","safety,certificate","NW-CHAIR-410@default@10"
```

Important columns:

Column	Meaning
`id`	Optional existing document ID used for updates, replacement or deletion
`name`, `description`	Required document metadata
`path`	Required for a new local document; optional when updating existing metadata
`customer_ids`	Comma-separated customer email addresses

Column	Meaning
`customer_group_ids`	Comma-separated customer-group codes
`category_id`	Category name. Despite the column name, import and export use the readable category name rather than its numeric database ID.
`send_email`	`1` queues assignment notifications after import
`tags`	Comma-separated tag names
`product_links`	`sku@store_code@position` entries separated by `|`

CLI options include `--behavior`, `--field_separator`, `--field_multiple_value_separator`, `--fields_enclosure` and `--delete_file_after_import`.

Automation

The package does not schedule imports itself. Use the store's deployment or operations scheduler when an upstream system produces a file:

```
php /path/to/magento/bin/magento customerdocuments:import-customerdocuments \
  /path/to/customer-documents.csv \
  --behavior=append \
  --delete_file_after_import=0
```

Before running unattended imports:

1. Validate a representative file manually.
2. Decide where successful and failed files are retained.
3. Monitor the command's exit code and output.
4. Verify imported access assignments with a fictional customer in the correct website.
5. Keep a recoverable copy outside Magento's import directory.

Related guides

- Customer Documents configuration
- Access control
- Common issues

GraphQL

The optional `mageb2b/customerdocuments-graph-ql` package exposes customer-facing document data for a headless storefront. Queries run in the current store and customer context; the package is not an administrator document-management API.

```
composer require mageb2b/customerdocuments-graph-ql:*
php bin/magento module:enable MageB2B_CustomerDocumentsGraphQl
php bin/magento setup:upgrade
```

Available operations

- `customerDocuments` returns a paginated document list and supports filters.
- `customerDocumentCategories` returns categories visible to the current customer.
- `customerDocument(id: Int!)` returns one accessible document.
- `downloadCustomerDocument(documentId: Int!, password: String)` prepares an allowed download and returns its result.

List filters include document name, description, product assignment, category, sidebar visibility, validity dates and creation date.

List example

```
query MyDocuments {
  customerDocuments(pageSize: 20, currentPage: 1) {
    items {
      id
      name
      description
      has_password
      is_downloadable
      remaining_downloads
      category {
        id
        name
      }
    }
    total_count
    page_info {
      current_page
      total_pages
    }
  }
}
```

Download example

```
mutation PrepareDocumentDownload($id: Int!, $password: String) {
  downloadCustomerDocument(documentId: $id, password: $password)
{
    success
    message
    download_url
    remaining_downloads
  }
}
```

Send the buyer's customer token with requests that access private documents. Do not cache one customer's response for another customer. The download mutation still enforces access, website, validity, password and download-limit rules.

The returned `download_url` is a signed link on the regular download endpoint. It stays valid for 30 minutes and can be opened without a customer session or a further password prompt, so treat it as a short-lived shareable credential rather than a permanent document URL.

Hyvä Compatibility

The optional `mageb2b/customerdocuments-hyva` package provides the Hyvä layouts, templates and view models needed when Customer Documents is used with a Hyvä theme. It replaces the Luma-oriented storefront rendering while document assignments, access rules and downloads stay owned by the base module.

```
composer require mageb2b/customerdocuments-hyva:*
php bin/magento module:enable MageB2B_CustomerDocumentsHyva
php bin/magento setup:upgrade
```

The package is registered through `Hyva_CompatModuleFallback`, so `Hyva_Theme` and the compatibility fallback must be active for its layout updates to apply. Installing it on a non-Hyvä storefront does not change that storefront.

Rebuild the theme CSS

The module ships its own Tailwind sources. Make sure its `templates/**/*.phtml` and `layout/**/*.xml` files are included in the Tailwind content scan of the active child theme, then run that theme's normal Hyvä CSS build. If the pages render but look unstyled, missing module classes in the generated theme CSS are the usual cause — `cache:flush` alone does not add them.

Storefront areas covered

The compatibility package supplies Hyvä presentation for:

- the **My Documents** page, including search, column sorting, tag-cloud filtering and the configured column visibility
- the My Account navigation entry and the optional "My Documents" header link
- the sidebar documents block
- product-page document lists and product downloads
- linked documents on the order, invoice, shipment and credit memo views
- the cart page document ZIP download
- the password prompt for protected documents, rendered as a modal

The features a customer actually sees still depend on the base module's configuration — for example **Enable at sidebar**, **Enable head link**, visible columns, ZIP download settings and each document's audience rules.

Verify the storefront

1. Sign in as a customer with assigned documents on the Hyvä store view.
2. Open **My Documents** and check search, sorting, tag filtering and the visible columns against the configuration.

3. Open a product with assigned documents and confirm the document section renders.
4. Place or open an order with linked documents and check the order, invoice, shipment and credit memo pages.
5. Try a password-protected download to confirm the modal flow, and a ZIP download where enabled.
6. Repeat the key pages at a mobile viewport.

Sample Data

The optional `mageb2b/customerdocuments-sample-data` package adds demonstration records for evaluation and local development.

Do not install it in production. The example documents and assignments are intended to demonstrate the feature, not to represent customer data, retention policies or a production access model.

```
composer require mageb2b/customerdocuments-sample-data:*
php bin/magento module:enable
MageB2B_CustomerDocumentsSampleData
php bin/magento setup:upgrade
```

After installation, inspect the sample records under **Customers > Customer Documents** and test them only with non-production users. Keep useful sample data while preparing a demo or screenshot set, and replace it with coherent fictional records when the scenario requires different relationships.

Two command-line helpers ship with the package:

```
php bin/magento sampledata:verify:customerdocuments   # check
that the sample records are present and consistent
php bin/magento sampledata:reset:customerdocuments    # remove
and recreate the sample records
```

Configuration Fields

This reference lists the settings exposed by `mageb2b/customerdocuments` in Magento Admin.

Configuration paths are included for controlled deployments and `config:set`. Use Magento Admin for normal changes so field validation and scope inheritance still apply. The extension status display is not listed because it reports installation state rather than a configurable value.

General Settings

Field	Configuration path	Input	Scope
Enabled at frontend	`customerdocuments/general/active`	Select	Default, Website, Store view
Enable at sidebar	`customerdocuments/general/enable_sidebar`	Select	Default, Website, Store view
Enable head link	`customerdocuments/general/enable_head_link`	Select	Default, Website, Store view
Upload path	`customerdocuments/general/upload_path`	Text	Default, Website, Store view
Obscure Filename	`customerdocuments/general/obscure_filename`	Select	Default, Website, Store view
Allowed External Domains	`customerdocuments/general/external_allowed_domains`	Text area	Default, Website, Store view
Allowed Extensions	`customerdocuments/general/allowed_extensions`	Text area	Default, Website, Store view
Maximum Upload File Size (MB)	`customerdocuments/general/max_upload_size_mb`	Text	Default, Website, Store view
Maximum Email Attachment Size (MB)	`customerdocuments/general/max_email_attachment_size_mb`	Text	Default, Website, Store view
Show Documents per Category	`customerdocuments/general/show_documents_per_category`	Select	Default, Website, Store view

Field	Configuration path	Input	Scope
Product Documents View Mode	`customerdocuments/general/product_view_mode`	Select	Default, Website, Store view
Show Document Name	`customerdocuments/general/show_document_name`	Select	Default, Website, Store view
Show Password Notice	`customerdocuments/general/show_password_notice`	Select	Default, Website, Store view
Visible Columns in Frontend	`customerdocuments/general/columns_visibility`	Multi-select	Default, Website, Store view
Enable ZIP Download	`customerdocuments/general/enable_zip_download`	Select	Default, Website, Store view
Enable Cart Document ZIP Download	`customerdocuments/general/enable_cart_zip_download`	Select	Default, Website, Store view
Delete Missing Files	`customerdocuments/general/delete_missing_files`	Select	Default, Website, Store view
Delete notifications after X days	`customerdocuments/general/delete_notification_after_days`	Text	Default, Website, Store view

Visible Columns in Frontend options: Created Date, File name, Category, Description, Is Public. The "Link to Document" column is always shown.

Email Settings

Field	Configuration path	Input	Scope
Email Sender	`customerdocuments/email/identity`	Select	Default, Website, Store view
Email Template	`customerdocuments/email/template`	Select	Default, Website, Store view
CC Receiver for emails	`customerdocuments/email/send_cc`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
BCC Receiver for emails	`customerdocuments/email/send_bcc`	Text	Default, Website, Store view
Add File as Attachment	`customerdocuments/email/add_file_as_attachment`	Select	Default, Website, Store view

Search Settings

Field	Configuration path	Input	Scope
Allowed Search Fields	`customerdocuments/search/fields`	Multi-select	Default, Website

Allowed Search Fields options: File name, Category, Description, Created at, Is Public, Password, Tags.

Link Documents

Field	Configuration path	Input	Scope
Enabled automatic link of documents	`customerdocuments/link_documents/enabled`	Select	Default, Website, Store view
Entity Patterns	`customerdocuments/link_documents/patterns`	Custom control	Default
Show message when linked documents are empty	`customerdocuments/link_documents/show_message_on_empty`	Select	Default, Website, Store view

Database Reference

Customer Documents stores each document once and controls who can see it through separate assignments. The same document can therefore be shared by customer, group or product context without duplicating the file.

Visibility and context

Relationship	Why it matters
`customer_document` belongs to one `store_website`	Defines the website in which the document is available.
`customer_document_customer` assigns a document to one `customer_entity`	Provides private documents to specific customer accounts.
`customer_document_customer_group` assigns a document to one `customer_group`	Shares documents with every customer in a selected group.
`customer_document_product` assigns a document to one `catalog_product_entity`	Shows product-related files in the appropriate product or account context.
`customer_document_product` belongs to one `store`	Allows product-document visibility to differ by Store View.

Delivery and reporting

Relationship	Why it matters
`customer_document_link` belongs to one `customer_document`	Connects a document to a sales entity (`link_entity_type` + `link_entity_id`: order, invoice, shipment or credit memo) created by the pattern matcher or API.
`customer_document_email_notification` links one `customer_document` with one `customer_entity`	Tracks customer-specific document notifications.
`customer_document_download_report` belongs to one `customer_document`	Supports download reporting for each document.

Relationship	Why it matters
`customer_document_tag_document` links one `customer_document` with one `customer_document_tag`	Groups and filters documents without changing their assignments.
`customer_document.category_id` references `customer_document_category`	Organizes documents into the categories managed under **All Document Categories**.

File contents, storage details and internal columns are intentionally omitted. Use the module interfaces when assigning or replacing documents.

Common Issues

A customer cannot see a document

Check the customer and group assignments, public status, website scope, validity dates and frontend enablement. For product documents, also check the product assignment's store view.

Reproduce with the affected customer account. Administrator access does not prove that the storefront audience is correct.

A download is denied

Confirm the audience and validity first, then check the password and download allowance. For a local document, verify that the file exists below the configured upload path. For an external document, verify the URL and allowed hostname.

A download reports "Download limit exceeded"

The extension allows five successful downloads of the same document within one hour — counted per signed-in customer, or per hashed IP address for guests. The counter resets on its own after the window expires. If many users share one IP (for example behind a company proxy), guest downloads can hit the limit early; affected users should download while signed in or wait for the window to pass.

This throttle is separate from the document's **Max. Downloads** field, which limits the total lifetime downloads of a document.

A local file returns a direct public response

Review the web-server protection for the Customer Documents upload folder. Customers should receive files through the extension's controlled download flow, not through a copied media URL.

An external link is rejected

Use an HTTP or HTTPS URL and add its exact hostname to **Allowed External Domains**. Avoid broad or empty allowlists in production.

A notification stays pending or fails

Check Magento cron, the mail transport and the notification record. If an attachment is missing, check the local file and the attachment-size limit.

An entity document is not linked

Compare the actual filename with the configured pattern, confirm the entity identifier and verify that the daily linking job completed.

A product document appears in one store but not another

Product assignments are store-scoped. Review the assignment in the affected store view and the document's website scope.

A ZIP is missing a document

The file must be local, accessible and currently valid. Password-protected and external documents are intentionally excluded.

An import row fails

Check required fields, the source file path, allowed extension, customer emails, group codes, category name and product-link syntax. Use Magento's **Check Data** step before importing.

FAQ

Can one document be assigned to several customers?

Yes. A document can have several direct customer assignments and several customer-group assignments.

Does Public make a document visible everywhere?

No. Public access removes the login requirement, but website scope, validity dates, passwords, download limits and file availability still apply.

Can documents be hosted outside Magento?

Yes. Save the document as an external URL and configure an explicit allowlist of trusted external hostnames.

Can customers search their documents?

Yes. My Documents can search the fields selected under **Search Settings**. Categories and tags also help customers narrow a large library.

Can documents appear on product pages?

Yes. Assign the document to a product for the relevant store view and enable the intended product document presentation. Normal document access checks still apply.

Can customers download every document as one ZIP?

Eligible local documents can be collected in a ZIP when the feature is enabled. Password-protected and external documents are excluded.

Can the system email a new document?

Yes. A notification can be queued when the document is saved. The queue runs every 30 minutes. Local files can be attached within the configured size limit.

Are downloads recorded?

Successful downloads create report data and update counters. Failed validation should not consume the customer's download allowance.

Can documents be linked to orders or invoices?

Yes. They can be linked to sales entities — orders, invoices, shipments and credit memos,

and a daily job can create those links from configured filename patterns.

Is there an integration API?

The optional REST package provides administrator-level document management. The optional GraphQL package provides signed-in customer document queries and download preparation for headless storefronts.

Can documents be imported in bulk?

Yes. The optional Import/Export package integrates with Magento's data-transfer screens and provides a command-line import.