



SOFTWARESILOS

Customer Documents Extension

PDF Manual

MODULE

customerdocuments

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Customer Documents Extension

Customer Documents Extension · /customerdocuments

Overview

The **MageB2B Customer Documents** module adds a document center to Magento:

- Manage customer documents in Admin (documents, categories, tags)
- Show documents in the customer account (“My Documents”)
- Optional public download links, password protection, validity ranges, ZIP download, and automation (cron)

Key Features

Access control

- Restrict documents by **customer** and/or **customer group**
- Optional **public documents** (downloadable without login)
- Optional **external URLs** with hostname whitelist (security)

Document lifecycle

- **Validity**: `valid_from` / `valid_to` date ranges
- **Max downloads** per document with counter
- **Download report** and customer-visible “My Documents”

UX features

- Category grouping in “My Documents”
- Tag-based filtering in “My Documents”
- Configurable visible columns in the “My Documents” list
- Optional product page document block for eligible documents
- Optional sidebar block (`sidebar.additional`)
- Optional ZIP download of all eligible documents

Feature Guides

- [Access Control](#)
- [Categories](#)
- [Product Assignments](#)
- [Product Page Downloads Tab](#)
- [Downloads & Security](#)
- [Email Notifications](#)
- [Link Documents](#)

Available Add-Ons

These are separate Composer packages/modules:

API Add-On

Adds REST API endpoints for managing documents, categories, assignments, and links.

Import/Export Add-On

Adds “Customer Documents” entity support to Magento’s built-in Import/Export UI and a CLI import command.

Sample Data (Optional)

`mageb2b/customerdocuments-sample-data` (useful for testing).

Where To Find It In Magento

- **Admin menu:** Customers > Customer Documents
- **Configuration:** Stores > Configuration > MageB2B > Customer Documents
- **Frontend:** Customer Account > My Documents (route: `/customerdocuments/index/index`)

Quick Start

1. **Installation Guide** - Install the extension in your Magento 2 store
2. **Configuration** - Configure storage, security, and notifications
3. **Admin Permissions (ACL)** - Set up roles and integration users

System Requirements

- Magento 2.4.6 - 2.4.8
- PHP 8.1 - 8.5

Installation

Customer Documents Extension · /customerdocuments/getting-started/installation

Requirements

- Magento 2.4.x
- PHP 8.1+

Install (Composer)

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/customerdocuments:*
php bin/magento module:enable MageB2B_CustomerDocuments
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

Verify

- Admin menu: Customers > Customer Documents
- Config: Stores > Configuration > MageB2B > Customer Documents
- Frontend: Customer Account > My Documents

CLI:

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

Next

- [Configuration](#)
- [Admin Permissions \(ACL\)](#)

Configuration

Customer Documents Extension · /customerdocuments/getting-started/configuration

Configure under: **Stores > Configuration > MageB2B > Customer Documents** (section id: customerdocuments).

General Settings

- **Enabled at frontend** (customerdocuments/general/active)
- **Enable at sidebar:** outputs a sidebar block in sidebar.additional
- **Enable head link:** adds “My Documents” link in customer header links
- **Upload path:** folder under pub/media/ where files are stored
- **Obscure Filename:** hides the original filename during download
- **Allowed External Domains:** hostname whitelist for external document URLs
- **Allowed Extensions** and **Maximum Upload File Size (MB)**
- **Show Documents per Category:** groups the list by category
- **Enable ZIP Download:** allow customers to download all eligible docs as ZIP
- **Delete Missing Files:** nightly cleanup of DB records without files
- **Delete notifications after X days:** cleanup of notification history
- **Product View Mode:** control if and how documents are shown on product pages
- **Show Document Name:** control filename/title visibility in customer-facing lists
- **Password Hint Message:** optional hint shown for password-protected documents
- **My Documents Columns:** choose which columns are visible in the customer table

See:

- [Product Assignments](#)
- [Product Page Downloads Tab](#)

Email Settings

- Sender identity and template
- CC/BCC receivers
- Attach file to email (only if file is below “Maximum Email Attachment Size (MB)”)

See: [Email Notifications](#)

Search Settings

- Allowed search fields for “My Documents” search.

Link Documents (Automatic Linking)

Controls the cron-based feature that links documents to entities (e.g. orders/invoices) using configurable patterns.

See: [Link Documents](#)

Next

- [Access Control](#)
- [Product Assignments](#)
- [Product Page Downloads Tab](#)
- [Cron Jobs](#)

[Access Control Features](#) → [Managing Categories](#) →

Cron Jobs

Customer Documents Extension · /customerdocuments/getting-started/cron-jobs

Customer Documents registers several cron jobs. Make sure Magento cron is running correctly.

Jobs

- `send_document_notification` (every 30 minutes): sends queued document notification emails
- `link_customer_documents` (daily 03:00): automatically links documents to entities (if enabled)
- `delete_missing_files` (daily 04:00): deletes DB records for missing files (if enabled)
- `customerdocuments_cleanup_old_notifications` (daily 05:00): deletes old notification history (based on config)

Troubleshooting

- If emails do not send: check `send_document_notification` runs and the mail setup works.
- If links do not appear on orders/invoices: check `link_customer_documents` and pattern configuration.

Admin Permissions (ACL)

Customer Documents Extension · /customerdocuments/getting-started/permissions

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
Customers > Customer Documents > E-Mail Notification	MageB2B_CustomerDocuments::email_notification
Config section	MageB2B_CustomerDocuments::config

Note For API Integrations

The **API Add-On** uses these same ACL resources for admin/integration tokens. For example:

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

Access Control

Customer Documents Extension · /customerdocuments/features/access-control

Customer Documents controls access per document using:

- **Public access** (`is_public`)
- **Customer assignments** (specific customer IDs)
- **Customer group assignments**

The effective rule is:

- If `is_public = 1` → access is allowed.
- Otherwise, the customer must be logged in and either:
 - explicitly assigned to the document, or
 - in an assigned customer group.

Where To Configure It

Admin:

- Customers > Customer Documents > All Documents

On each document you can configure:

- customers
- customer groups
- public access
- validity (`valid_from` / `valid_to`)
- max downloads
- password (optional)

Website Scope

Each document is stored with a `website_id`. In the frontend list, documents are filtered to:

- `website_id = 0` (all websites) **or**
- the current website id

Public Links vs “My Documents”

There are two different download flows:

“My Documents” (customer account)

- Requires login.
- Uses `customerdocuments/index/checkdownload` (AJAX) and `customerdocuments/index/downloadfile`.

Public download link

- Only works for documents with **Is Public = Yes**.
- Uses `customerdocuments/download/file?id=<document_id>` (optionally

&password=...).

See: [Downloads & Security](#)

Document Categories

Customer Documents Extension · /customerdocuments/features/categories

Categories group documents in Admin and (optionally) in the customer “My Documents” list.

Creating Categories

Admin:

Customers > Customer Documents > All Document Categories

1. Click "Add Category"
2. Enter the category name
3. Save

Category Settings

Setting	Description
Name	Category display name

Default Categories

There are no mandatory default categories. Create the ones you need, e.g.:

Category	Purpose
Invoices	Invoice PDFs
Contracts	Contracts / NDAs
Certificates	Certificates / compliance
Manuals	Manuals and guides
General	Miscellaneous

Display In “My Documents”

Enable **Show Documents per Category**

(customerdocuments/general/show_documents_per_category) to group the customer list by category.

Related

- [Access Control](#)
- [Configuration](#)

Downloads & Security

Customer Documents Extension · /customerdocuments/features/downloads-and-security

Customer Documents supports:

- Local file downloads (stored in `pub/media/...`)
- External URL redirects (for files hosted elsewhere)

Storage & Direct Access

Files are stored under `pub/media/<upload_path>/` (configured in Admin).

Even though the module serves downloads via controllers, you should **block direct web access** to the upload folder in production.

Example (nginx):

```
location ~* ^/pub/media/customerdocuments/ {  
    deny all;  
}
```

If you changed the upload path in Admin, adjust this server rule to match your configured folder.

Public Download URLs

If a document is **public** (`is_public = 1`), it can be downloaded without login:

```
/customerdocuments/download/file?id=<document_id>
```

If the document also has a password:

```
/customerdocuments/download/file?id=<document_id>&password=<password>
```

Public downloads are rate-limited (per document and requester) to reduce brute-force attempts.

Customer Account Downloads

In the “My Documents” area, protected downloads use a short-lived token flow:

1. The customer starts a download (and enters a password if required).
2. The system validates access and creates a temporary token.
3. The file is streamed only while this token is still valid (about 60 seconds).

External Documents (Redirect Mode)

Documents can be marked as external (`is_external = 1`) with an `external_url`.

Security rules:

- Only http/https URLs are accepted.
- The hostname can be restricted via **Allowed External Domains** (customerdocuments/general/external_allowed_domains).
 - Empty list means “allow all” (not recommended in production).

Obscure Filename

If **Obscure Filename** is enabled (customerdocuments/general/obscure_filename), customers download files with a generated filename instead of the original basename.

ZIP Download

ZIP downloads exclude:

- password-protected documents
- external documents

See: [ZIP Download](#)

Email Notifications

Customer Documents Extension · /customerdocuments/features/email-notifications

Automatically notify customers when new documents are available. The email notification system uses a queue-based approach with retry logic and delivery tracking.

How It Works

1. **Queue Creation** - When a document is saved with "Send Email" enabled, notification entries are created for all assigned customers
2. **Cron Processing** - The `SendDocumentNotification` cron job processes pending notifications in batches of 100
3. **Email Delivery** - Emails are sent with configurable templates, CC/BCC recipients, and optional file attachments
4. **Status Tracking** - The system tracks delivery status (pending/sent/failed) and retry attempts

Configuration

Email Settings

Navigate to **Stores > Configuration > MageB2B > Customer Documents > Email Settings**.

Email Sender

Select which store email identity to use as the sender (General Contact, Sales Representative, etc.)

Email Template

Choose the email template for document notifications. You can customize this template under **Marketing > Email Templates**.

CC Receivers

Enter email addresses to receive copies of all notifications. Separate multiple addresses with semicolons (;).

Example: `manager@example.com;admin@example.com`

BCC Receivers

Enter email addresses for blind carbon copies. Recipients won't see each other's addresses.

Add File as Attachment

Enable this to attach the document file to the email (subject to size limits).

File Attachment Settings

Maximum Email Attachment Size

Set the maximum file size (in MB) for email attachments:

Path: Stores > Configuration > MageB2B > Customer Documents > General Settings > Maximum

Email Attachment Size (MB)

- **0** = No limit (not recommended - may cause mail server issues)
- **Recommended:** 5-10 MB
- Files larger than this limit will not be attached to emails

Why limit attachment size?

- Prevents mail server rejection
- Avoids inbox quota issues
- Improves email delivery reliability

Sending Notifications

Manual Sending (Admin)

1. Navigate to **Customers > Customer Documents > All Documents**
2. Select documents using checkboxes
3. Choose **Actions > Send Email**
4. Click **Submit**
5. Notifications are queued and will be sent by the next cron run

Automatic Sending (On Save)

When creating or editing a document:

1. Enable the **Send Email** checkbox in the document form
2. Save the document
3. Notifications are automatically queued for all assigned customers

Notification Queue

Viewing the Queue

Navigate to **Customers > Customer Documents > E-Mail Notification** to see:

- Document name
- Customer email
- Status (Pending/Sent/Failed)
- Attempt count
- Created/Sent timestamps
- Error messages (if failed)

You can also re-send selected records from this grid using the available mass action.

Status Types

Status	Description
Pending	Waiting to be sent by cron job
Sent	Successfully delivered
Failed	Delivery failed after 3 attempts

Retry Logic

- **Maximum attempts:** 3
- **Batch size:** 100 notifications per cron run
- **Retry interval:** Next cron execution (every 30 minutes by default)

Cron Job

SendDocumentNotification

Schedule: Every 30 minutes (* / 30 * * * *)

What it does:

1. Fetches pending notifications (max 100 per run)
2. Loads document and customer data
3. Checks file size against attachment limit
4. Sends email with or without attachment
5. Updates notification status
6. Logs statistics

Monitoring

Check cron execution logs:

```
tail -f var/log/system.log | grep "Document notification"
```

View statistics in logs:

```
Document Notification Statistics: {"Pending": 45, "Sent": 1203, "Failed": 12}
```

Email Template Variables

When customizing email templates, you can use these variables:

Variable	Description
{{var customerdocument.name}}	Document name
{{var customerdocument.description}}	Document description
{{var customer_firstname}}	Customer first name
{{var customer_lastname}}	Customer last name
{{var customer_email}}	Customer email

Cleanup

Delete Old Notifications

Configure automatic cleanup of old notifications:

Path: Stores > Configuration > MageB2B > Customer Documents > General Settings > Delete notifications after X days

- Pending/Sent/Failed notifications older than X days will be deleted
- Helps keep the database clean
- Recommended: 30-90 days

Troubleshooting

Emails Not Sending

Check cron execution:

```
php bin/magento cron:run
```

Verify email configuration:

- Stores > Configuration > General > Store Email Addresses
- Test with a simple Magento email (password reset, order confirmation)

Check notification queue:

- Navigate to Email Notifications grid
- Look for error messages in failed notifications

Attachments Not Included

File too large:

- Check the file size against your configured limit
- Increase the limit or reduce file size

External documents:

- External URLs (is_external = 1) cannot be attached
- Only local files can be attached to emails

File missing:

- Verify the file exists on the filesystem
- Check the upload path configuration

High Failure Rate

Mail server limits:

- Your mail server may have rate limits
- Stagger large sends and monitor SMTP/provider limits

Invalid email addresses:

- Check customer email addresses for typos
- Clean up invalid addresses in customer data

Attachment size:

- Large attachments may be rejected by recipient mail servers
- Reduce the maximum attachment size limit

Best Practices

- **Test email templates** - Send test emails before mass notifications
- **Monitor the queue** - Regularly check for failed notifications
- **Set reasonable limits** - Keep attachment size under 10 MB
- **Use BCC for monitoring** - Add admin email to BCC for oversight
- **Clean up old notifications** - Enable automatic cleanup to maintain performance
- **Don't send too frequently** - Respect customer preferences and avoid spam
- **Don't attach huge files** - Use download links instead of large attachments

Related Features

- [Access Control](#) - Control who receives notifications
- [Password Protection](#) - Secure document downloads
- [Link Documents](#) - Link documents to orders/invoices

Link Documents

Customer Documents Extension · </customerdocuments/features/link-documents>

Customer Documents can automatically link uploaded files to Magento entities (orders, invoices, shipments) based on filename patterns.

What “Linking” Means

Linking allows you to show related documents on:

- order view
- invoice view
- shipment view

Configuration

Configure under:

- [Stores](#) > [Configuration](#) > [MageB2B](#) > [Customer Documents](#) > [Link Documents](#)

Settings:

- **Enabled automatic link of documents**
- **Entity Patterns** (pattern list)
- **Show message when linked documents are empty**

Pattern Syntax

Patterns use placeholders in curly braces, replaced with entity data.

Example (order PDF by increment id):

```
order-{increment_id}.pdf
```

The nightly process builds expected filenames from your configured patterns and links matching documents automatically.

Supported entity types in the core module:

- `order`
- `invoice`
- `shipment`

Additional entity types can be provided by compatible add-ons or custom integrations.

Cron

The linking process runs nightly:

- `link_customer_documents` (daily 03:00)

See: [Cron Jobs](#)

Known Limitation

Depending on installed version/customization, the option "**Show message when linked documents are empty**" may behave inconsistently in some storefront contexts.

If you rely on this message for customer guidance, test it in your exact theme and checkout/account setup.

Password Protection

Customer Documents Extension · /customerdocuments/features/password-protection

Secure sensitive documents with password protection. Customers must enter the correct password before they can download protected documents.

How It Works

When you enable password protection for a document:

1. **Admin sets password** - In the document edit form, enter a password in the "Password" field
2. **Customer attempts download** - When clicking the download link, a password prompt appears
3. **Password validation** - The system validates the password before the file is released
4. **Time-limited token** - Upon successful validation, a 60-second download token is generated
5. **Secure download** - The customer can download the file using the temporary token

Configuration

Setting a Password

1. Navigate to **Customers > Customer Documents > All Documents**
2. Edit or create a document
3. In the "Password" field, enter your desired password
4. Save the document

Security Features

AJAX Validation

- Password validation happens via AJAX before download
- No page reload required
- Public downloads are rate-limited; "My Documents" uses a short-lived token

Time-Limited Tokens

- Download tokens expire after 60 seconds
- Tokens are stored in customer session
- Tokens are short-lived and validated server-side

ZIP Download Exclusion

- Password-protected documents are **automatically excluded** from ZIP bulk downloads
- This prevents bypassing password protection
- Customers must download protected files individually

Best Practices

- **Use strong passwords** - Combine letters, numbers, and special characters
- **Share passwords securely** - Send passwords via separate communication channel (not in the same email as the document link)

- **Rotate passwords** - Change passwords periodically for highly sensitive documents
- **Combine with access control** - Use password protection together with customer group restrictions for maximum security
- **Don't use simple passwords** - Avoid "password123" or "12345"
- **Don't share passwords publicly** - Never post passwords in public forums or documentation
- **Keep password length in mind** - The password field is currently limited to 20 characters

Use Cases

Confidential Contracts

Protect legal contracts and NDAs with passwords. Share the password only with authorized signatories.

Financial Documents

Secure invoices, tax documents, and financial statements with password protection.

Personal Data

Protect documents containing personal information (GDPR compliance).

Temporary Access

Use passwords for time-sensitive documents that should only be accessible for a limited period.

Troubleshooting

Password Not Working

- Check for typos (passwords are case-sensitive)
- Ensure the password was saved correctly in the admin panel
- Clear browser cache and try again

Token Expired

- Download tokens expire after 60 seconds
- Simply re-enter the password to generate a new token

Can't Download from ZIP

- This is expected behavior - password-protected documents are excluded from ZIP downloads
- Download protected files individually after entering the password

Related Features

- **Access Control** - Restrict documents to specific customers/groups
- **Downloads & Security** - Public links, external URLs, server hardening
- **Email Notifications** - Notify customers about new documents

Product Assignments

Customer Documents Extension · /customerdocuments/features/product-assignments

Product Assignments let you link documents to specific products so they can appear on the product page.

Where to Assign Documents

In Magento Admin:

- **Catalog > Products**
- Open a product
- In the product form, use the **Customer Documents** section

Inside that section:

- click **Add Documents**
- select one or more documents from the listing
- save the product

Scope Behavior (Store View)

Assignments are store-view aware:

- you assign documents in the currently selected store context
- product page rendering uses current store context
- if no assignment exists for the current store, global/default assignment can be used

What Can Be Assigned

You can assign documents that are already created in:

- **Customers > Customer Documents > All Documents**

Eligibility on frontend still depends on document access rules (public/customer/customer-group/validity/password).

See: [Access Control](#)

Remove Product Assignments

To remove assigned documents from a product:

- open product edit page
- open **Customer Documents** section
- remove selected entries
- save product

Related

- [Product Page Downloads Tab](#)

- Configuration
- API Add-On: Product Assignments

Product Page Downloads Tab

Customer Documents Extension · </customerdocuments/features/product-page-tab>

When enabled and applicable, Customer Documents adds a **Downloads** tab on product detail pages.

How It Appears

The tab is shown in product details area as **Downloads**.

Important:

- if no eligible documents are found for the current product/store/customer context, the tab is not rendered

Document Rendering Modes

Configuration: **Stores > Configuration > MageB2B > Customer Documents > Product View Mode**

- **Default (Flat List)**
- **Group by Category**

What Customers See

The tab can show:

- document link/title (depending on **Show Document Name**)
- optional description
- optional password-protection hint

Password-protected documents trigger a password prompt before download.

Access Rules Still Apply

A document assigned to a product is shown only if access checks pass for the current visitor/context.

See:

- [Access Control](#)
- [Downloads and Security](#)

Common Visibility Checks

If the tab or documents are missing:

- verify product assignment exists
- verify current store view context
- verify document validity window and access assignment
- verify frontend is enabled for Customer Documents

Related

- [Product Assignments](#)
- [Configuration](#)

Sidebar Block

Customer Documents Extension · /customerdocuments/features/sidebar

Customer Documents can render a “My Documents” list in the storefront sidebar.

How It Works

- Global toggle: `customerdocuments/general/enable_sidebar`
- Per-document toggle: `show_in_sidebar`
- Output container: `sidebar.additional`

Only documents the current customer is allowed to access are shown.

Setup

1. Enable the sidebar in `Stores > Configuration > MageB2B > Customer Documents > General Settings`.
2. For each document, enable **Show in sidebar**.
3. Ensure your theme has a `sidebar.additional` container on the pages where you want the block.

Note: If the customer is not logged in, the sidebar block will not show private documents.

Tags

Customer Documents Extension · /customerdocuments/features/tags

Tags are optional labels you can assign to documents (e.g. `invoice`, `contract`, `important`) to improve organization and filtering.

Admin

- Manage tags: `Customers > Customer Documents > All Document Tags`
- Assign tags when editing a document: `Customers > Customer Documents > All Documents`

Customer Experience

- Customers can use tags as a quick filter in **My Documents** to find relevant files faster.
- Recommended: keep tag names short and consistent (for example `invoice`, `contract`, `sds`).

Import/Export

The Import/Export add-on supports a `tags` column (comma-separated) in CSV.

See: [Import/Export Add-On](#)

ZIP Download

Customer Documents Extension · /customerdocuments/features/zip-download

If enabled (`customerdocuments/general/enable_zip_download`), customers can download all eligible documents as a ZIP from “My Documents”.

Rules / Exclusions

The ZIP contains only:

- local files (no external URLs)
- documents without a password
- documents the customer is allowed to access

If no eligible documents exist, the customer gets a “No downloadable documents found” notice.

API Add-On

Customer Documents Extension · /customerdocuments/addons/api

The **Customer Documents API Add-On** exposes REST endpoints for managing documents, categories, assignments, and links.

Package/module:

- Composer: `mageb2b/customerdocuments-api`
- Module: `MageB2B_CustomerDocumentsApi`

Installation

```
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
```

Authentication & Permissions

Use Admin/Integration tokens. The add-on reuses the core module ACL:

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

See: [Admin Permissions \(ACL\)](#)

Reference

- [REST API](#)
- Magento Swagger UI: `/swagger`

REST API Reference

Customer Documents Extension · /customerdocuments/addons/api/rest-api

This API requires the optional add-on mageb2b/customerdocuments-api (MageB2B_CustomerDocumentsApi).

Authentication

Use an Admin/Integration Bearer token.

```
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

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

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

POST/PUT /V1/customerdocuments (wrapper: document)

```
{
  "document": {
    "id": 1777,
    "name": "Invoice 1001",
    "description": "January invoice",
    "is_external": 1,
    "external_url": "https://example.com/invoice-1001.pdf",
    "path": "customerdocuments/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],
    "document_data": {
      "base_name": "invoice-1001.pdf",
      "base64_data": "data:application/pdf;base64,JVBERi0xLjQK..."
    }
  }
}
```

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

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

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

```
{
  "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": "customer",
    "link_entity_id": 4801
  }
}
```

Error Codes

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

Code	Meaning
500	Internal API/service-contract/runtime error

Import/Export Add-On

Customer Documents Extension · /customerdocuments/addons/csv_import_export

This add-on integrates Customer Documents with Magento's built-in **Import/Export** screens and adds a CLI import command.

Package/module:

- Composer: `mageb2b/customerdocuments-importexport`
- Module: `MageB2B_CustomerDocumentsImportExport`

What You Get

- Export entity: **Customer Documents**
- Import entity: **Customer Documents**
- CLI import command: `customerdocuments:import-customerdocuments`
- Sample CSV download in the Import UI ("Download Sample File")

Quick Start

- [Installation](#)
- [Export Documents](#)
- [Import Documents](#)
- [CSV Format](#)
- [Automation](#)

Installation

Customer Documents Extension · /customerdocuments/addons/csv_import_export/installation

Install the Import/Export add-on for Customer Documents.

Requirements

- Customer Documents Extension installed
- Magento 2.4.0 or higher
- PHP 8.1+

Installation

```
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 setup:di:compile
php bin/magento cache:flush
```

Verification

After installation, verify the add-on is active:

1. Go to **System > Data Transfer > Export** and confirm “Customer Documents” is available as entity
2. Go to **System > Data Transfer > Import** and confirm “Customer Documents” is available as entity
3. Download the sample CSV for this entity and run a small test import

Related

- [Import Documents](#)
- [CSV Format](#)

Import Documents

Customer Documents Extension · /customerdocuments/addons/csv_import_export/import

Import documents using the Magento Import UI or via CLI.

Import Process

Step 1: Prepare CSV File

Create a CSV file with the required columns. See [CSV Format](#) for details.

Step 2: Provide Files (new documents)

For new documents, `path` must point to a real file on disk (relative to Magento root). Example:

```
var/import/customerdocuments/test_1.pdf
```

During import, the file is copied into the configured upload folder (`customerdocuments/general/upload_path`) and the stored document path is updated.

Step 3: Run Import

Via Admin:

1. Go to **System > Data Transfer > Import**
2. Select **Entity Type: Customer Documents**
3. Upload your CSV file
4. Click **Check Data** (recommended)
5. Click **Import**

Via CLI:

```
php bin/magento customerdocuments:import-customerdocuments  
/path/to/file.csv
```

Import Behaviors

Behavior	Description
Append / Add/Update	Create documents (no <code>id</code>) and update existing ones (with <code>id</code>).
Replace	Deletes the documents referenced by <code>id</code> in the CSV and re-imports them (useful for “replacing” a file/row).
Delete	Deletes the documents referenced by <code>id</code> in the CSV.

Validation

Use **Check Data** in the Admin Import UI first. The importer validates:

- required fields (name, description, and path for new docs)
- customers (expects emails in customer_ids)
- customer groups (expects group codes in customer_group_ids)
- category (expects a category name in category_id)
- product_links syntax (expects sku@store_code@position entries separated by |)
- file exists at the given path
- file extension allowed by customerdocuments/general/allowed_extensions

Import Options

Option	Description
import_path	Required CLI argument (CSV file path)
--behavior	append, add_update, replace, delete (default append)
--field_separator	Field separator (default ,)
--field_multiple_value_separator	Default ,
--fields_enclosure	Default 0
--delete_file_after_import	Delete CSV after import (default 1)

Updating Without Changing Files

If you set id (existing document id), path is not required. This lets you update metadata (assignments, validity, tags, etc.) without re-uploading a file.

Related

- [CSV Format](#)
- [Export Documents](#)
- [Automation](#)

Export Documents

Customer Documents Extension · `/customerdocuments/addons/csv_import_export/export`

Export customer document metadata using Magento's built-in Export UI.

Export Process

Via Admin

1. Go to **System > Data Transfer > Export**
2. Select **Entity Type: Customer Documents**
3. Click **Continue**
4. Download the generated CSV file

Export Columns

The export contains:

- document metadata (including `id`, `name`, `description`, `path`, `validity`, etc.)
- customer emails (column `customer_ids`)
- customer group codes (column `customer_group_ids`)
- category name (column `category_id`)
- tags (column `tags`)
- product assignments (column `product_links` in format `sku@store_code@position|...`)

This export is metadata-focused; it does not bundle files. Use the stored paths to locate files under `pub/media/`.

Full field list and semantics: [CSV Format](#)

Related

- [Import Documents](#)
- [CSV Format](#)
- [Automation](#)

CSV Format

Customer Documents Extension · /customerdocuments/addons/csv_import_export/csv-format

This add-on uses one CSV format for both export and import.

File Requirements

- **Encoding:** UTF-8 (with or without BOM)
- **Line endings:** LF or CRLF
- **Delimiter:** comma (default)
- **Enclosure:** double quote

Example CSV

```
"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"
"Document
Name","Description","mysecret123","var/import/customerdocuments/test_1.pdf",
"1","0","General,Wholesale","roni_cost@example.com,mycustomer2@gmail.com",
"", "General", "0", "2025-01-01", "2025-12-31", "0", "important,contract", "WSH12-29-Red@default@10|24-MB01@default@20"
```

Column Notes

- `id`: optional; needed to update an existing document without changing the file
- `name`, `description`: required
- `path`:
 - required for new documents
 - points to a real file on disk (relative to Magento root)
 - importer copies the file into `pub/media/<upload_path>/`
- `customer_ids`: comma-separated customer **emails**
- `customer_group_ids`: comma-separated customer group **codes**
- `category_id`: category **name**
- `send_email`: 1 queues email notifications after import
- `tags`: comma-separated tags
- `product_links`: optional document-to-product links in format `sku@store_code@position|sku2@store_code@position`

Related

- [Import Documents](#)
- [Export Documents](#)

Automation

Customer Documents Extension · /customerdocuments/addons/csv_import_export/automation

This add-on does not ship its own cron automation. If you need automation, schedule imports yourself (cron/CI) by running the CLI import command.

```
php /path/to/magento/bin/magento customerdocuments:import-customerdocuments  
/path/to/file.csv --behavior=append
```

Related

- [Installation](#)
- [Import Documents](#)
- [Export Documents](#)