



SOFTWARESILOS

Customer Documents Extension

PDF Manual

MODULE

customerdocuments

LAST UPDATED

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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](#)