Access Control

Customer Documents Documentation

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

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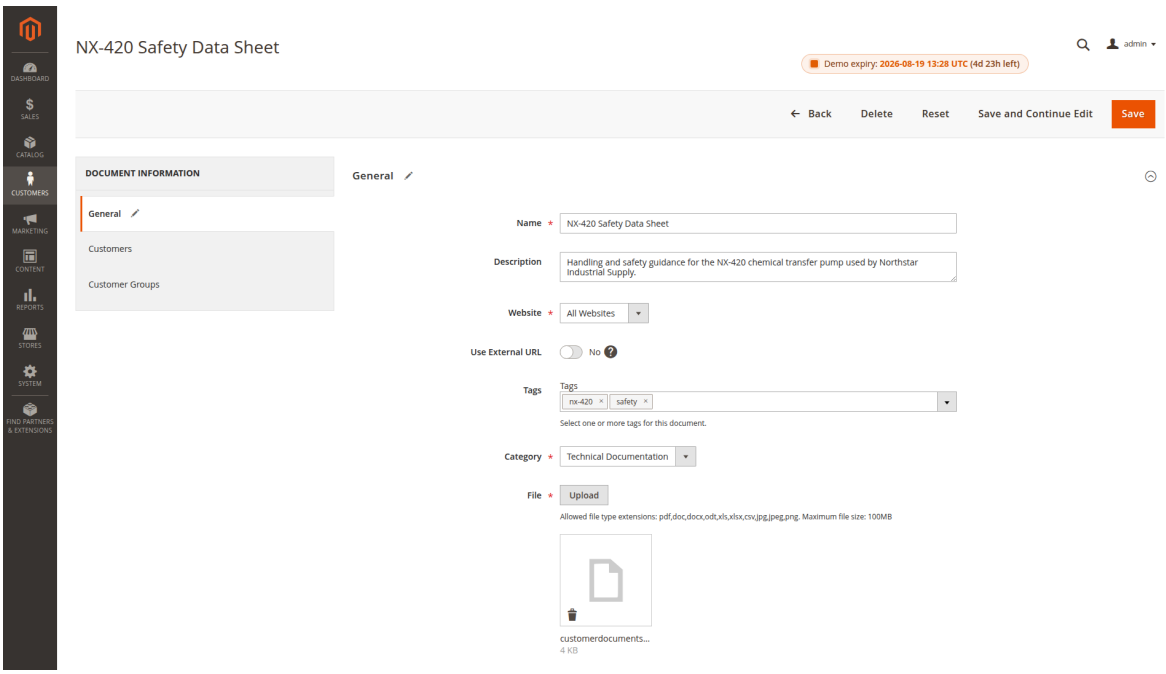
EXTENSION
Magento 2 Extension Customer Documents

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.

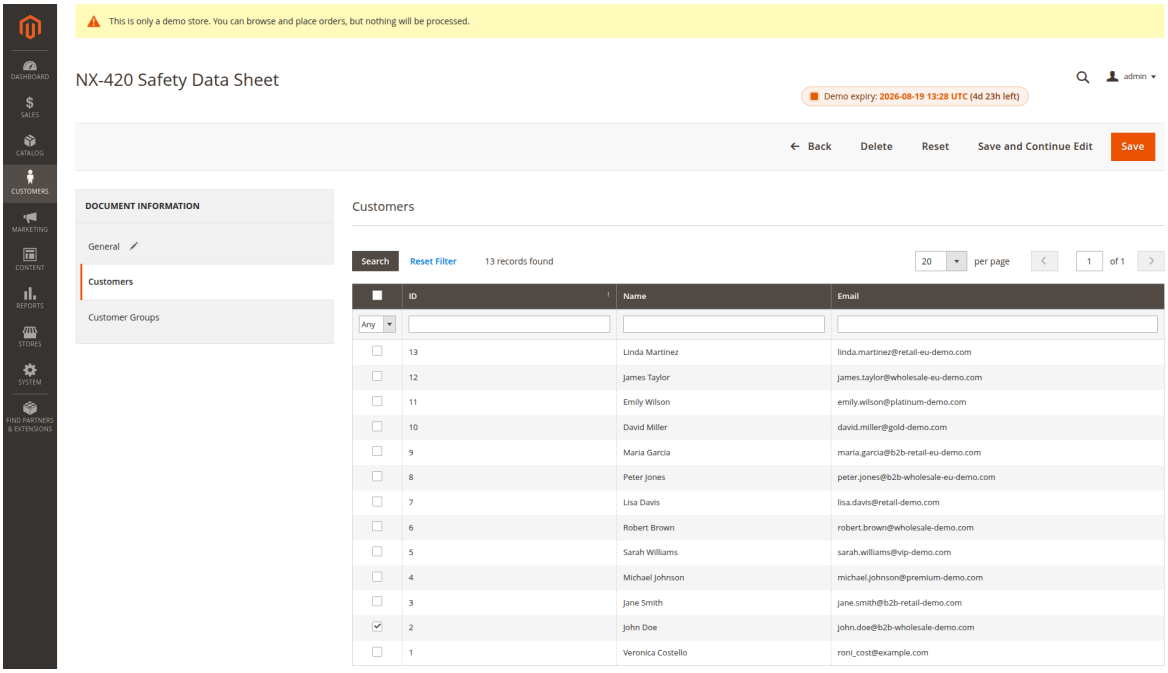
The document form keeps the file, description, website, category and tags together. Complete those fields before assigning an audience so the customer sees useful context rather than only a filename.

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.