



Access Control

Customer Documents Documentation

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

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SOURCE
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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.

The screenshot shows the 'NX-420 Safety Data Sheet' document form. The left sidebar contains navigation links: DASHBOARD, SALES, CAMPAIGN, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled 'NX-420 Safety Data Sheet' and includes a 'Demo expiry: 2026-08-19 13:28 UTC (Hd 23h left)' notification. The form is divided into 'DOCUMENT INFORMATION' and 'General' tabs. The 'General' tab is active, showing fields for Name, Description, Website, Use External URL, Tags, Category, and File. The 'Name' field is 'NX-420 Safety Data Sheet'. The 'Description' field is 'Handling and safety guidance for the NX-420 chemical transfer pump used by Northstar Industrial Supply'. The 'Website' field is 'All Websites'. The 'Use External URL' toggle is 'No'. The 'Tags' field contains 'nx-420' and 'safety'. The 'Category' field is 'Technical Documentation'. The 'File' field is 'Upload' with a note: 'Allowed file type extensions: pdf, doc, docx, odt, xls, xlsx, csv, jpg, jpeg, png. Maximum file size: 100MB'. A file icon is shown with the name 'customerdocuments...' and a size of '4 KB'.

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.

⚠ This is only a demo store. You can browse and place orders, but nothing will be processed.

NX-420 Safety Data Sheet

Demo expiry: 2026-08-19 13:28 UTC (4d 23h left)

🔍 admin ▾

← Back
Delete
Reset
Save and Continue Edit
Save

DOCUMENT INFORMATION

General ✎

Customers

Customer Groups

Customers

Search Reset Filter
13 records found

20 per page
< 1 of 1 >

	ID	Name	Email
Any ▾			
☐	13	Linda Martinez	linda.martinez@retail-eu-demo.com
☐	12	James Taylor	james.taylor@wholesale-eu-demo.com
☐	11	Emily Wilson	emily.wilson@platinum-demo.com
☐	10	David Miller	david.miller@gold-demo.com
☐	9	Maria Garcia	maria.garcia@b2b-retail-eu-demo.com
☐	8	Peter Jones	peter.jones@b2b-wholesale-eu-demo.com
☐	7	Lisa Davis	lisa.davis@retail-demo.com
☐	6	Robert Brown	robert.brown@wholesale-demo.com
☐	5	Sarah Williams	sarah.williams@vip-demo.com
☐	4	Michael Johnson	michael.johnson@premium-demo.com
☐	3	Jane Smith	jane.smith@b2b-retail-demo.com
☒	2	John Doe	john.doe@b2b-wholesale-demo.com
☐	1	Veronica Costello	roni_cost@example.com

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.

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.

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](#).