Document Categories

Customer Documents Documentation

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

LAST UPDATED
2026-09-26

SOURCE
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EXTENSION
Magento 2 Extension Customer Documents

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.