



SOFTWARESILOS

Customer Documents Extension

PDF Manual

MODULE

customerdocuments

LAST UPDATED

2026-03-29

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](#)