Configuration

Customer Documents Documentation

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

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EXTENSION
Magento 2 Extension Customer Documents

Configuration

Open `Stores > Configuration > MageB2B > Customer Documents`. Select the intended website or store-view scope before saving.

Frontend and storage

- **Enabled at frontend** controls customer-facing document areas.
- **Enable at sidebar** adds the optional sidebar block.
- **Enable head link** adds the My Documents account link.
- **Upload path** is a folder below `pub/media`. If it changes, the extension attempts to move existing local files and logs warnings for missing files.
- **Allowed Extensions** limits local upload types.
- **Maximum Upload File Size** adds a module limit. PHP and web-server upload limits still apply.
- **Obscure Filename** replaces the original filename presented during download.

For external documents, set **Allowed External Domains** to a comma- or newline-separated list of trusted hostnames. Leaving this list empty permits every external domain and is not suitable for a controlled production setup.

Customer presentation

Choose whether My Documents is grouped by category and which columns are visible. Product documents can use a flat or category-based presentation. Document names and password notices can also be shown or hidden.

Enable customer ZIP or cart-document ZIP downloads only after reviewing which files are eligible. Password-protected and external documents are not included in bulk ZIP downloads.

Email notifications

Choose the sender identity, template and optional CC or BCC recipients. Local files can be attached when attachment delivery is enabled and the file is within the configured email attachment limit. Large files are better delivered through the protected download link.

See Email Notifications.

Search

Select the document fields customers can search in My Documents. Use names, categories and descriptions consistently so search results are useful.

Automatic linking

Automatic linking matches uploaded filenames to configured order, invoice or shipment patterns during the daily linking job. Enable it only after testing the pattern against known entity numbers.

See Automatic Entity Linking.

Cleanup settings

- **Delete Missing Files** allows the daily cleanup to remove local-document records whose files no longer exist.
- **Delete notifications after X days** controls retention of pending, sent and failed notification records.

Back up the database and document storage before enabling deletion. Review Background Jobs and monitor the first run.