Customer Documents Extension

PDF Manual

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Overview

The **MageB2B Customer Documents** module adds a document center to Magento:

- Manage customer documents in Admin (documents, categories, tags)
- Show documents in the customer account ("My Documents")
- Optional public download links, password protection, validity ranges, ZIP download, and automation (cron)

Key Features

Access control

- Restrict documents by **customer** and/or **customer group**
- Optional **public documents** (downloadable without login)
- Optional **external URLs** with hostname whitelist (security)

Document lifecycle

- **Validity**: `valid_from` / `valid_to` date ranges
- **Max downloads** per document with counter
- **Download report** and customer-visible "My Documents"

UX features

- Category grouping in "My Documents"
- Tag-based filtering in "My Documents"
- Configurable visible columns in the "My Documents" list
- Optional product page document block for eligible documents
- Optional sidebar block (`sidebar.additional`)
- Optional ZIP download of all eligible documents

Feature Guides

- Access Control
- Categories
- Product Assignments
- Product Page Downloads Tab
- Downloads & Security
- Email Notifications
- Link Documents

Available Add-Ons

These are separate Composer packages/modules:

API Add-On

Adds REST API endpoints for managing documents, categories, assignments, and links.

Import/Export Add-On

Adds "Customer Documents" entity support to Magento's built-in Import/Export UI and a CLI import command.

Sample Data (Optional)

`mageb2b/customerdocuments-sample-data` (useful for testing).

Where To Find It In Magento

- **Admin menu:** `Customers > Customer Documents`
- **Configuration:** `Stores > Configuration > MageB2B > Customer Documents`
- **Frontend:** `Customer Account > My Documents` (route: `/customerdocuments/index/index`)

Quick Start

1. **Installation Guide** - Install the extension in your Magento 2 store
2. **Configuration** - Configure storage, security, and notifications
3. **Admin Permissions (ACL)** - Set up roles and integration users

System Requirements

- Magento 2.4.6 - 2.4.8
- PHP 8.1 - 8.5