

# Customer Attachments extension for Magento2

User Guide

Version 1.0



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## I) Introduction

Customer Attachment extension allows you to take control over customer information and dowload files. The module supports numerous file formats to help you easily share attachment info with customers.

#### \*FEATURES:

#### **Backend**

- Add conditions to sort out Customer information easily
- Fixed Customers: select one/ select all
- Mutiple Customers can be assigned to Multiple Attachments and in reverse
- Automatically send email to notice customers
- Upload file and attach URL link online
- Drag and Drop Upload via Customer Grid in a fast and easy way
- Download Report
- Adjust download limitation
- Adjust time range to download files
- API Support
- Cron Job automatically deletes unused files
- Run on multiple websites or store views

#### **Frontend**

- List of Attachments
- Advanced Filter: Name and Date

## II) Configuration

To configure general extension settings please go to Stores  $\rightarrow$  Configuration  $\rightarrow$  Customer Attachments.

## 1. General Settings

**Enable**: allow the Customer Attachment extension display on the frontend and backend of product pages

Route: for example "attachments"

Show on Top Link: define if Customer Attachment section is shown on Top Link

Title: enter any content you want, for example "My Files"

Hide Title without Files: define if Title should be displayed without files

Order By: Position/Alphabetical

#### **General Settings**

Current Version [store view]	1.0.0	
Enabled [store view]	Yes	•
Route [store view]	attachments	
	https://domain.com/ROUTE	
Show in Top Link [store view]	Yes	•
Title [store view]	My Files	
Hide Title without Files [store view]	No	•
Order By [store view]	Position	•



## 2. Email Settings

**Email Sender**: choose of the admin to send in notification Emails

Contact Email: enter Email ID of the admin

**New Attachment**: select template for the notification Emails

**Email Settings** 



# III) Add New Attachment

To add new attachment, navigate to **Customer > Attachment** then click "Add New Attachment"

## 1. General Information

**Enable Attachment:** enable the attachments display on the frontend and backend product pages

**Name**: specify a separate file name for your internal use **Description**: add a simple description of the attachment

Type: File/URL

File: attach a file either by adding it from your computer

General Information	
Enable Attachment	Yes
Name *	
Description	
Туре	File
File	
	Browse to find or drag file here



**URL**: enter an URL link of the file you want to attach

From - To: pick a time range to enable downloading the file above

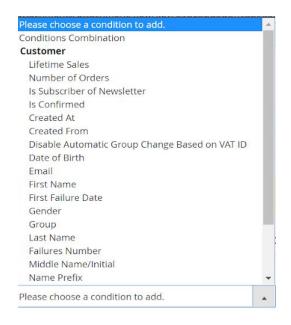
Max. Downloads: set maximum size of file to allow for attachment upload

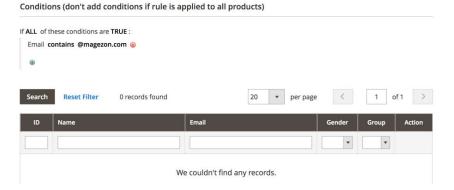
Websites: choose a Website where the file is displayed

URL		
From	dumb iiiii	
То	(****)	
Max. Downloads		
Websites *	Main Website	0

## 2. Conditions

To add conditions applying to attachment, go to **Customer > Attachment > Conditions**Choose one from the Condition dropdown to set rules for customer field



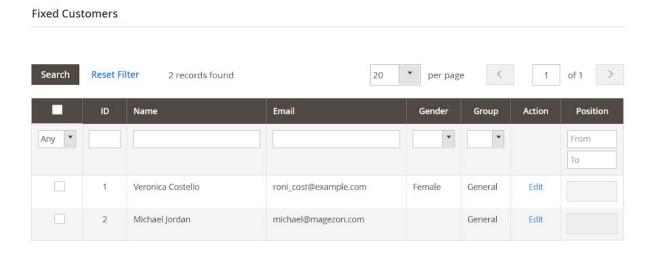


## 3. Fix Customers

To add a new customer who is allowed to download a specific attachment, fill in ID, name, Email, Gender, Group and Position detail.

Fix Customers section lists out the information you need about customer in grid for you to select available customer.

You can search and edit customer's detail.

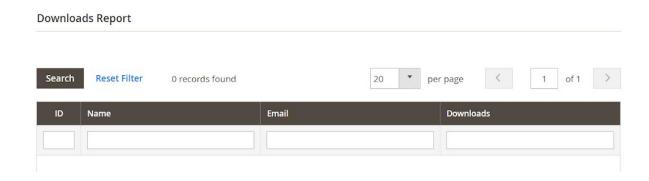


## 4. Downloads Report

To see all downloaded attachments please go to Customer > Attachments >

## **Downloads Report**

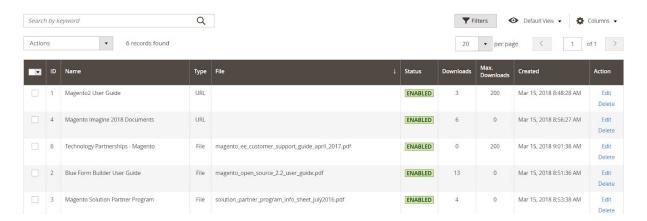
This section gives you information about: Attachments' ID, Name, Email of customers, etc.so you can view and analyze detailed reports on file downloads



# IV) Attachment Management

This page enables a dedicated page of downloads and enlist all the files so that admin can control and take action: edit, change status and delete.

You can select several or all files at one to make amendment, click "Save Edit" button when finish.



# V) Customer Management

You can see all customers in the Customer tab.

To add new customer's information, click "**Add new custome**r" button. You can use the Actions dropdown menu to delete, subcribe/unsubcribe to newsletter, asign to a customer group and edit.

You can also export customer's detail to CSV or Excel file for later use

To rearrange collumn, just drag-and-drop it on other area. From the Collumn dropdown, you can decide which collumn is shown in the grid by ticking or unticking.

