

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 download 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
- Multiple 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 → Configuration → 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 <small>[store view]</small>	1.0.0
Enabled <small>[store view]</small>	Yes
Route <small>[store view]</small>	attachments <small>https://domain.com/ROUTE</small>
Show in Top Link <small>[store view]</small>	Yes
Title <small>[store view]</small>	My Files
Hide Title without Files <small>[store view]</small>	No
Order By <small>[store view]</small>	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

Email Sender <small>[store view]</small>	General Contact	▼
Contact Email <small>[store view]</small>	<input type="text"/>	
New Attachment <small>[store view]</small>	New Attachment (Default)	▼

Email template chosen based on theme fallback when "Default" option is selected.

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

Type

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	<input type="text"/>
From	<input type="text"/> 
To	<input type="text"/> 
Max. Downloads	<input type="text"/>
Websites *	<div data-bbox="529 1096 768 1388"><p>Main Website</p></div> 

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

Please choose a condition to add.

Conditions Combination

Customer

- Lifetime Sales
- Number of Orders
- Is Subscriber of Newsletter
- Is Confirmed
- Created At
- Created From
- Disable Automatic Group Change Based on VAT ID
- Date of Birth
- Email
- First Name
- First Failure Date
- Gender
- Group
- Last Name
- Failures Number
- Middle Name/Initial
- Name Prefix

Please choose a condition to add.

Conditions (don't add conditions if rule is applied to all products)

If ALL of these conditions are TRUE :

Email contains @magezon.com

Search [Reset Filter](#) 0 records found 20 per page 1 of 1

ID	Name	Email	Gender	Group	Action

We couldn't find any records.

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.

Fixed Customers

Search
[Reset Filter](#)
2 records found

20 ▼ per page
 <
1 of 1
 >

	ID	Name	Email	Gender	Group	Action	Position
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text" value="From"/> <input type="text" value="To"/>
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	Female	General	Edit	<input type="text"/>
<input type="checkbox"/>	2	Michael Jordan	michael@magezon.com		General	Edit	<input type="text"/>

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

Downloads Report

Search [Reset Filter](#) 0 records found per page of 1

ID	Name	Email	Downloads
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

Filters | Default View | Columns

Actions

6 records found

20 per page | < 1 of 1 >

☐	ID	Name	Type	File	Status	Downloads	Max. Downloads	Created	Action
<input type="checkbox"/>	1	Magento2 User Guide	URL		ENABLED	3	200	Mar 15, 2018 8:48:28 AM	Edit Delete
<input type="checkbox"/>	4	Magento Imagine 2018 Documents	URL		ENABLED	6	0	Mar 15, 2018 8:56:27 AM	Edit Delete
<input type="checkbox"/>	6	Technology Partnerships - Magento	File	magento_ee_customer_support_guide_april_2017.pdf	ENABLED	0	200	Mar 15, 2018 9:01:38 AM	Edit Delete
<input type="checkbox"/>	2	Blue Form Builder User Guide	File	magento_open_source_2_2_user_guide.pdf	ENABLED	13	0	Mar 15, 2018 8:51:36 AM	Edit Delete
<input type="checkbox"/>	3	Magento Solution Partner Program	File	solution_partner_program_info_sheet_july2016.pdf	ENABLED	4	0	Mar 15, 2018 8:53:38 AM	Edit Delete

V) Customer Management

You can see all customers in the Customer tab.

To add new customer's information, click **"Add new customer"** button. You can use the Actions dropdown menu to delete, subscribe/unsubscribe to newsletter, assign to a customer group and edit.

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

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

Search by keyword Q

Filters
Default View
Columns
Export

Actions v

2 records found

20 per page

<
1
>

v	ID ↓	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Action
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Mar 15, 2018 8:39:23 AM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female	Edit
<input type="checkbox"/>	2	Michael Jordan	michael@magezon.com	General					Mar 15, 2018 3:36:33 PM	Main Website	Confirmation Not Required	Default Store View				Edit