

Attachments Anywhere for Magento

User Guide

version 1.0

created by "IToris"

IToris

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1. Introduction

1.1. Purpose

This document is a **User Guide** for **Attachments Anywhere module for Magento**. It describes how work with the extension.

With **Attachments Anywhere** you can easily add downloadable files to your product pages, CMS pages as well as customers' dashboards.

2. Installation and License

2.1. System Requirements

The extension works under Magento from 1.4.x and higher.

The extension works with Apache 1.3.x and higher, PHP 5, Linux or IIS.

The extension's correct work is guaranteed with the following browsers:

- IE7, IE8, IE9
- FireFox 4.x, 5.x
- Google Chrome 15.x
- Safari 5.x

The correct work with other Magento versions, other browsers and Apache/PHP versions is not guaranteed.

2.2. Installation

All our Magento extensions and templates are installed via **IToris Installer**.

Download **IToris Installer** from here <http://www.itoris.com/itoris-magento-installer.html> and un-pack to the root of your website. It will then appear in menu **System → IToris extensions → IToris Installer**.

Open it and you will see all our Magento Extensions and Templates, both installed and available. You can install, update and un-install them with one click now.

Find **Attachments Anywhere** in the list of extensions and press **Install** button. It will ask for the license key that you will receive after the purchase. Enter the key and submit. The extension will be installed. It will be available in menu **System → IToris extensions → Attachments Anywhere**.

The screenshot displays the Magento Admin Panel interface. At the top, there's a navigation bar with tabs for Dashboard, Sales, Catalog, Mobile, Customers, Promotions, Newsletter, CMS, Reports, System, and a search bar. Below the navigation bar, a message states: "Latest Message: New version 1.0.1 of Instant Search & Suggestions is available. Read details". The main content area is titled "Dashboard" and shows various widgets: "Lifetime Sales" with a value of \$0.00, "Average Orders" with a value of \$0.00, "Last 5 Orders" table, and "Last 5 Search Terms" table. On the right side, a dropdown menu is open, showing a list of IToris extensions and tools. The "Attachments Anywhere" extension is highlighted, and its "Install" button is visible. Other items in the menu include "My Account", "Notifications", "IToris Extensions", "Tools", "Web Services", "Design", "Import/Export", "Manage Current", "Transactional E", "Custom Variab", "Permissions", "Magento Conne", "Cache Manage", "Index Manage", "Manage Stores", "Order Statuses", "Configuration", "IToris Installer", "File Magus", "Product Tabs Slider", "Smart Login", "Pending Registration", "Registration Fields Manager", "Sale Labels", "Countdown Anywhere", "Homepage Product Slider", "Events Manager", "Home Page Content Slider", "Home Page Tabs", and "Instant Search & Suggestions".

2.3. License

Attachments Anywhere extension has 2 types of licenses - regular and premium ones.

Regular license is website-dependent. By 'website' here we understand the website in Magento terms. Under one Magento installation one license key of the extension can activate all stores/storeviews within one website.

Modules with regular license are partially encrypted.

If your configuration has several Magento websites - a separate license will be required for each.

Premium license provides 100% open-source modules. It allows activating the whole Magento installation, including all its websites, stores/storeviews.

Premium license is recommended when you plan customizations.

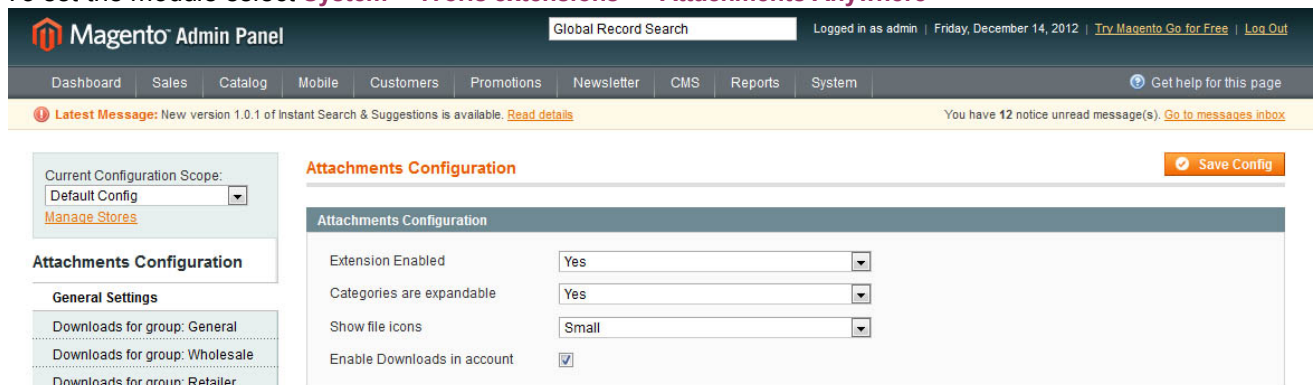
You can switch the license from one website to another – login to <http://www.itoris.com> using the credentials you will receive after the purchase. Go to **My Downloads** area, find your key there and reset it from the current website. Then use it again to activate another website.

Both licenses also include free life-time updates for the extension.

3. How to Use

3.1. General Settings

To set the module select **System → IToris extensions → Attachments Anywhere**



The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with 'Magento Admin Panel' and a search bar. Below it, a menu bar includes 'Dashboard', 'Sales', 'Catalog', 'Mobile', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', and 'System'. A message banner at the top indicates a new version of Instant Search & Suggestions is available. The main content area is titled 'Attachments Configuration' and features a 'Save Config' button. On the left, there's a sidebar with 'Current Configuration Scope' set to 'Default Config' and a 'Manage Stores' link. Below this, the 'Attachments Configuration' section is expanded, showing 'General Settings' with options for 'Downloads for group: General', 'Wholesale', and 'Retailer'. The main configuration area on the right includes four settings: 'Extension Enabled' (set to 'Yes'), 'Categories are expandable' (set to 'Yes'), 'Show file icons' (set to 'Small'), and 'Enable Downloads in account' (checked checkbox).

On this page you can select the main configuration of the module:

- **Extension Enabled** - this setting activates the module for the front-end
- **Categories are expandable** - select yes if you plan to create categories for downloadable files and want them to expand/collapse
- **Show file icons** - select small or large icons to be displayed for downloadable files
- **Enable Downloads in accounts** - activate this checkbox if you want to add downloadable files to customers' dashboards

There is ability to select its own set of settings for stores/storeviews (use Current Configuration Scope drop-down).

3.1.1. Secured Download

Some files can be very sensitive against unauthorized downloading. That is why secured download functionality is implemented in the module, providing only authorized downloading.

Depending on your settings and the place where you upload files they can be downloaded only by the customers that have permissions to do that.

There is no ability to share the URL or view/download the files uploaded for another customer group, single customer, and so on.

3.1.2. Declare Functionality in Template

To make Attachments work please declare the module in your template:

1. Open file **app/design/frontend/base/default/layout/catalog.xml** and find there

<catalog_product_view translate="label"> area.

Add the following code inside **<block type="catalog/product_view" name="product.info" template="catalog/product/view.phtml">**

```
<block type="itoris_attachments/attachments" name="itoris_attachments"
as="itoris_attachments" />
```

2. Open file **app/design/frontend/base/default/template/catalog/product/view.phtml** and find **<div class="product-collateral">**.

Add before Details, directly after **<div class="product-collateral">** the following code:

```
<?php echo $this->getChildHtml('itoris_attachments') ?>
```

3.2. Downloadable Files for Product Pages

To create downloadable area on product pages please open a product. There will be a new tab there **Attachments**.

The screenshot displays the IToris product management interface. At the top, a yellow header bar contains the product name "30" Flat-Panel TFT-LCD Cinema HD Monitor (Monitors)" and several action buttons: Back, Reset, Delete, Duplicate, Save, and Save and Continue Edit. Below the header, a left sidebar lists various product management tabs: Prices, Meta Information, Images, Description, Design, Recurring Profile, Gift Options, Inventory, Websites, Categories, Related Products, Up-sells, Cross-sells, Product Reviews, Product Tags, Customers Tagged Product, Custom Options, Tabs, Attachments (highlighted with a mouse cursor), and Sale Labels. The main content area shows the "Attachments" tab, which contains a list of product attributes and their values. The attributes include Weight, Status, Tax Class, URL Key, Visibility, Manufacturer, Set Product as New from Date, Set Product as New to Date, Max Resolution, Contrast Ratio, Response Time, Screensize, and Country of Manufacture. Each attribute has a corresponding input field or dropdown menu, and a small icon (likely for image upload) is visible next to the date fields. The values are as follows: Weight: 1.0000, Status: Enabled, Tax Class: None, URL Key: 30-flat-panel-tft-lcd-cinema-hd-monitor, Visibility: Catalog, Search, Manufacturer: Apple, Max Resolution: 1920x1200, Contrast Ratio: 1500:1, Response Time: 15ms, Screensize: 30", and Country of Manufacture: (empty dropdown). The date fields are empty.

Select the tab to add downloadable files to the product.

3.2.1. Upload Files for Products

There will be a special area for creating downloads. Start with uploading files.

Press **Browse Files** button and find you file(s) that you keep locally. You can select several files together for uploading. Add them. You will see then in the list on the page.

Press **Upload Files** button to upload the files.

If you upload the same file for several products - there is no need to re-upload it anew each time. Select it in **Load Existing Document** area.

3.2.2.Create Categories

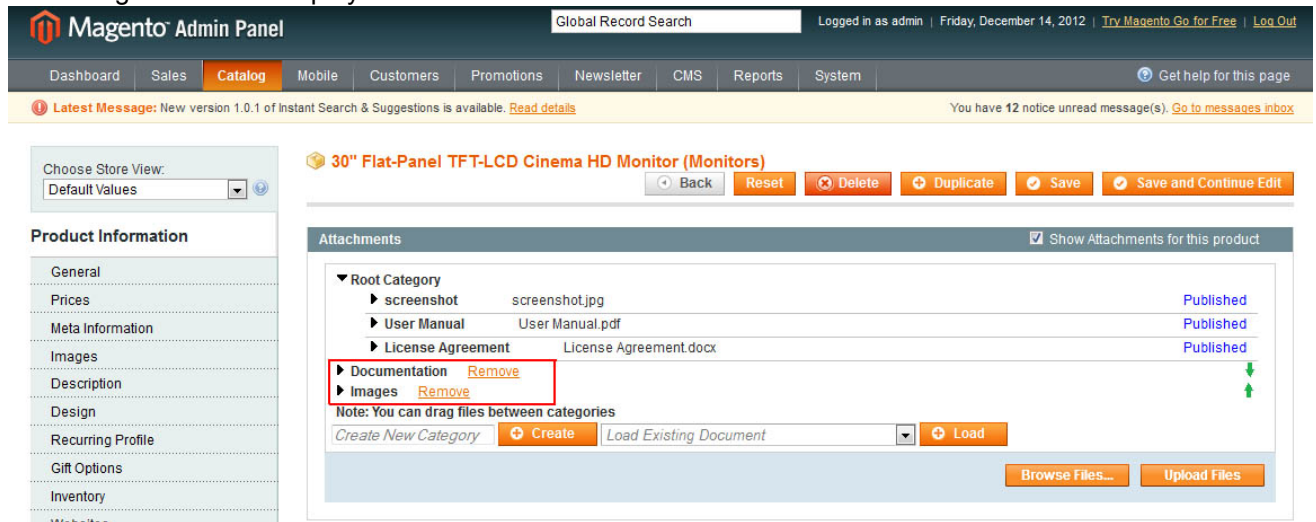
All uploaded files will be displayed in the main (root category).

If you leave them as they go now - they will be displayed all together.

If you want to create categories and separate files in them - enter the first category name in **Create New Category** field and press **Create** button.

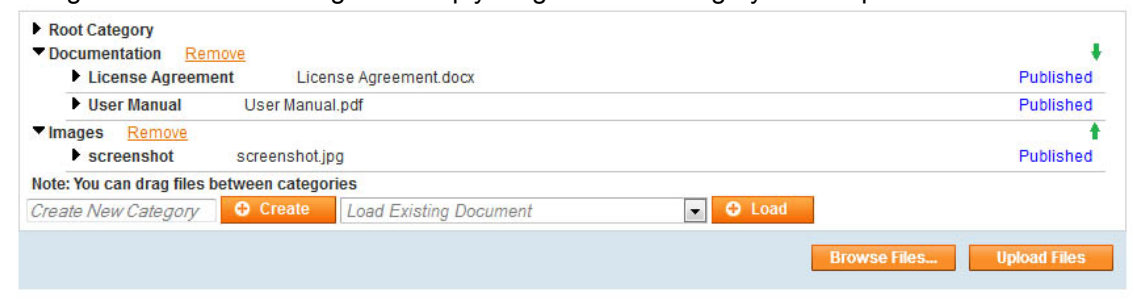
Create all categories you need the same way.

Now categories will be displayed under the list of files.



The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with tabs for Dashboard, Sales, Catalog, Mobile, Customers, Promotions, Newsletter, CMS, Reports, and System. Below this is a 'Global Record Search' bar and a status bar indicating the user is logged in as 'admin' on Friday, December 14, 2012. A 'Latest Message' banner at the bottom of the navigation bar states: 'New version 1.0.1 of Instant Search & Suggestions is available. Read details'. The main content area shows the product page for '30" Flat-Panel TFT-LCD Cinema HD Monitor (Monitors)'. On the left, there's a sidebar with 'Choose Store View' set to 'Default Values' and a 'Product Information' menu with options like General, Prices, Meta Information, Images, Description, Design, Recurring Profile, Gift Options, Inventory, and Websites. The main content area has a 'Back' button and a 'Reset' button. Below these, there's a 'Attachments' section with a checkbox 'Show Attachments for this product' which is checked. The attachments are listed in a table with columns for category, file name, and status. The categories are 'Root Category', 'Documentation', and 'Images'. The files are 'screenshot.jpg', 'User Manual.pdf', and 'License Agreement.docx'. The 'Documentation' and 'Images' categories have a 'Remove' link next to them. At the bottom, there's a 'Note: You can drag files between categories' and a 'Create New Category' button with a 'Load Existing Document' dropdown and a 'Load' button. There are also 'Browse Files...' and 'Upload Files' buttons.

To organize files in the categories simply drag files to a category and drop there.



This screenshot is a zoomed-in view of the 'Attachments' section from the previous image. It shows the 'Root Category' expanded, revealing 'Documentation' and 'Images' sub-categories. The 'Documentation' category contains 'License Agreement.docx' and 'User Manual.pdf'. The 'Images' category contains 'screenshot.jpg'. Each file has a 'Published' status and a green arrow on the right, indicating it can be moved. Below the list, there's a 'Note: You can drag files between categories' and a 'Create New Category' button with a 'Load Existing Document' dropdown and a 'Load' button. There are also 'Browse Files...' and 'Upload Files' buttons.

Green arrows on the right allow switching the order of the categories. The order they are displayed on the front-end will be the same as here in admin area.

You can remove a category by clicking **Remove** link near its name.

New categories can be created later on and added to the list.

3.2.3.Set Special Permissions for Files' Visibility

There is ability to make each file available under special conditions only. To set this please click a file. There will appear a settings' area:

Attachments ☑ Show Attachments for this product

▶ Root Category

▼ Documentation Remove

▼ User Manual Remove ↓

Title: User Manual

Published: ☒ Show only if product purchased: Always

All Store Views

Main Website

Main Store

English

French

German

All Groups

NOT LOGGED IN

General

Wholesale

Retailer

QAAAA

▶ License Agreement Remove Published

▼ Images Remove ↑

▶ screenshot Published

Note: You can drag files between categories

Create New Category + Create Load Existing Document + Load

Browse Files... Upload Files

- **Title** - you can change the file's title
- **Published** - only when this checkbox is checked the file will be available on the front-end
- **Show only if product purchased** - there are 3 options available in this setting:
 - Always - the file will be shown to all customers
 - If purchased - the file will be displayed only to the customers who have purchased this product
 - If not purchased - the file will be displayed for the customers who have not purchased this product only
- **Store views** - if you want the file to be visible on selected stores/storeviews only, please select them here
- **Groups** - you can make the file available for selected customer groups only.

3.3. Attachments for CMS Pages

In addition to products, you can create attachments for CMS pages as well. Attachments block is added to the pages as a widget.

Please open the page and select Content from the left tabs. Insert widget in a usual Magento way:

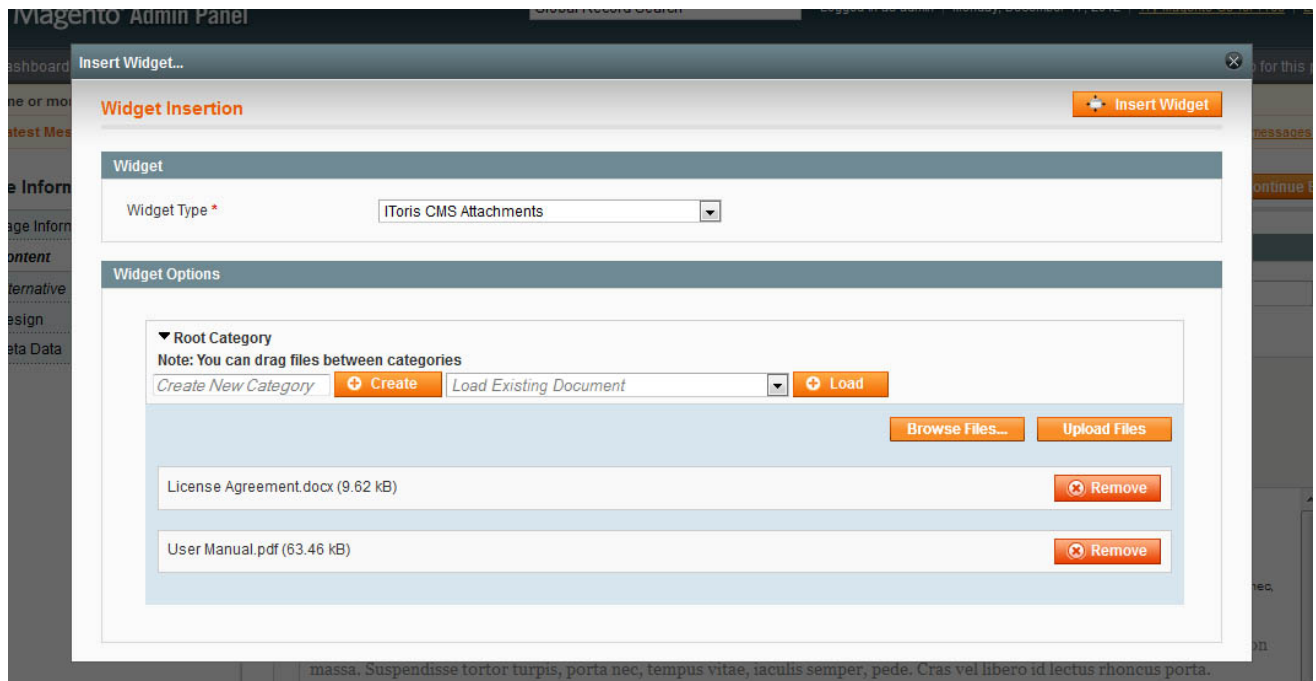
The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with tabs for Dashboard, Sales, Catalog, Mobile, Customers, Promotions, Newsletter, CMS, Reports, and System. The CMS tab is active. Below the navigation bar, there are several status messages, including one about cache types and another about a latest message. The main content area is titled 'Edit Page 'About Us'' and includes buttons for Back, Reset, Delete Page, Save Page, and Save and Continue Edit. On the left, there's a sidebar with 'Page Information' and 'Content' sections. The 'Content' section is expanded, showing a rich text editor with a toolbar and a text area containing placeholder text.

In the opened modal window select IToris CMS Attachments. There will appear an area for managing files and categories.

The screenshot shows the 'Insert Widget' modal window. It has a title bar 'Insert Widget...' and a close button. The main content area is divided into two sections: 'Widget Insertion' and 'Widget Options'. In the 'Widget Insertion' section, there's a 'Widget Type' dropdown menu with 'IToris CMS Attachments' selected. In the 'Widget Options' section, there's a 'Root Category' dropdown menu with a note 'Note: You can drag files between categories'. Below this, there are buttons for 'Create New Category', 'Create', 'Load Existing Document', 'Load', 'Browse Files...', and 'Upload Files'. The 'Create' and 'Load' buttons are highlighted with a plus icon.

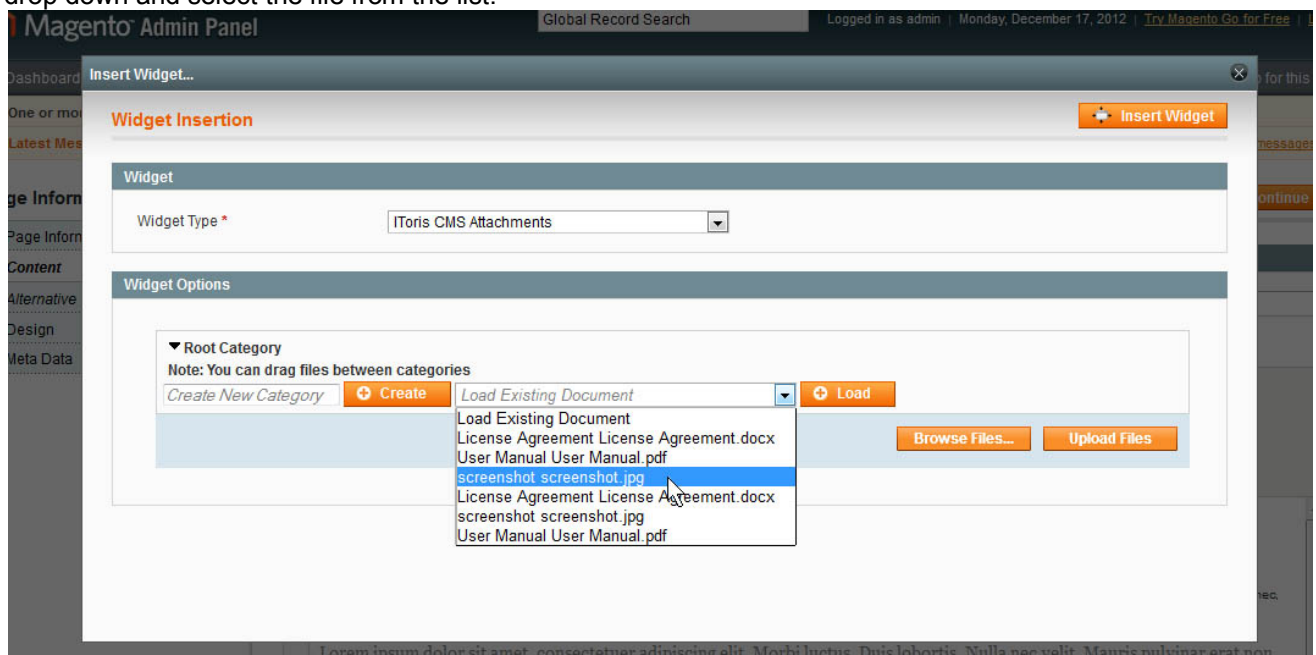
3.3.1. Upload files for CMS Pages

To upload files for CMS pages press **Browse Files** button and select the files. Several Files can be selected together.



Once selected, they will appear in the list on the page. Press **Upload Files** button to upload them.

If you have upload the files before, there is no need to re-upload then. Instead, press Load Existing Document drop down and select the file from the list.

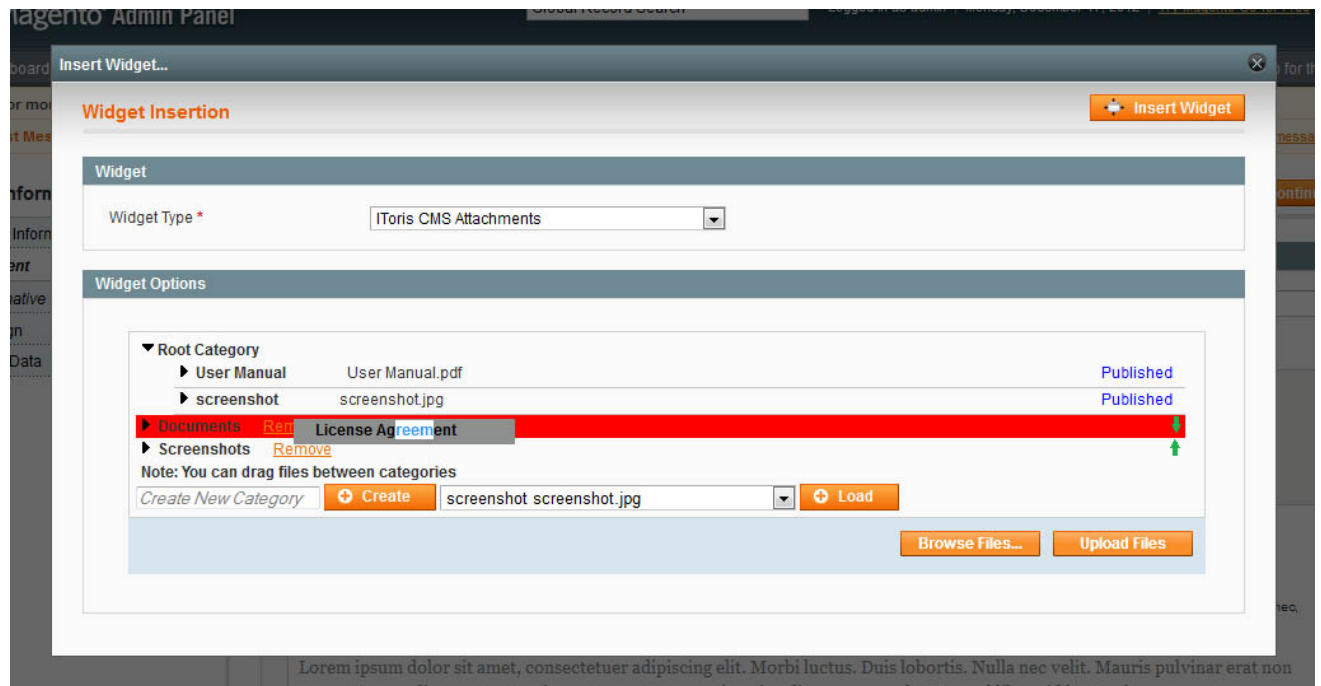


3.3.2. Create Categories

Once files have been uploaded, they all are displayed in the root category. If you want to separate them into categories - please create the categories.

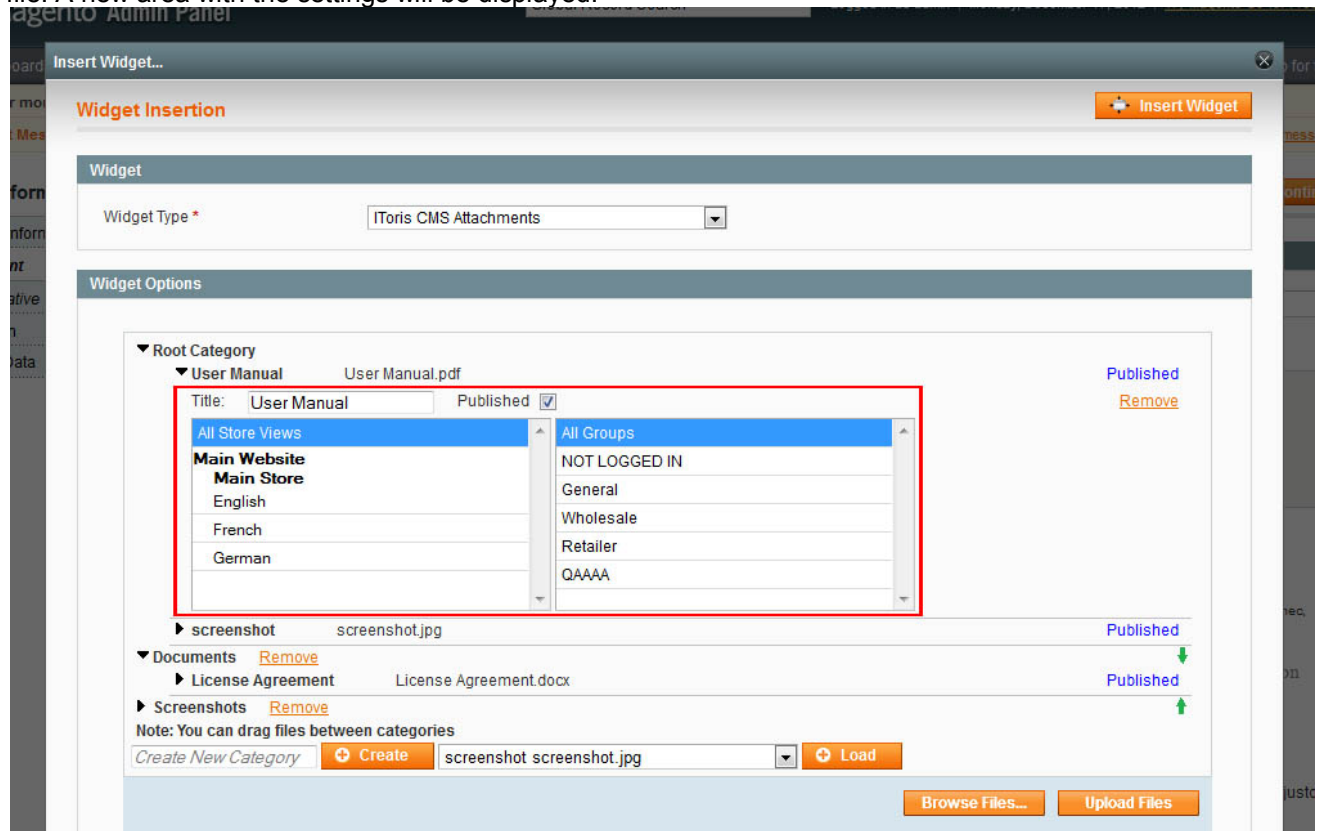
Enter the first category name in **Create New Category** field and press **Create** button. Create all categories you need the same way.

To organize files in the categories simply drag the file to the category and drop there.



3.3.3. Set Special Visibility Permissions

There is ability to make files available under special conditions only. To set a file's visibility permissions click a file. A new area with the settings will be displayed.



- **Title** - you can change the file's title
- **Published** - only when this checkbox is checked the file will be available on the front-end

- **Store views** - if you want the file to be visible on selected stores/storeviews only, please select them here
- **Groups** - you can make the file available for selected customer groups only.

3.4. Attachments in Customers' Dashboards

There is ability to create a set of downloadable files for each customer group. There will appear a new area (Attachments) in Dashboard, where the files will be available for downloading.

Each group will have its own set of files; other groups' files will not be available.

3.4.1. Add Downloadable Files for Customer Groups

To add files to customer groups please select **System -> IToris Extensions -> Attachments Anywhere**.

On the left there will be tabs to create downloadable files for each customer group you have:

The screenshot shows the Magento Admin Panel interface. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Mobile', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', and 'System'. The left sidebar contains a 'Manage Stores' link and a list of configuration scopes: 'Default Config', 'Downloads for group: General', 'Downloads for group: Wholesale', 'Downloads for group: Retailer', and 'Downloads for group: QAAAA'. The main content area is titled 'Attachments Configuration' and contains a form with the following fields: 'Extension Enabled' (set to 'Yes'), 'Categories are expandable' (set to 'Yes'), 'Show file icons' (set to 'Large'), and 'Enable Downloads in account' (checked). A 'Save Config' button is located in the top right corner of the configuration area.

Select the group and add files for downloading there.

The functionality of [adding files](#) and [creating categories](#) is the same as for products or CMS pages.

If you click a file's name - there will be additional settings for it:

The screenshot shows the 'Attachments' configuration page. It displays a list of attachments under the 'License Agreement' category. The first entry is 'License Agreement.docx', which is marked as 'Published'. Below the list, there is a note: 'Note: You can drag files between categories'. At the bottom, there are buttons for 'Create New Category', 'Create', 'Load', 'Browse Files...', and 'Upload Files'.

File is visible on the front-end only when **Published** checkbox is checked.
You can **change the file's title** by re-typing it and saving the changes.

3.4.2. Add Files for a Customer Individually

You can upload files for customers individually. For example, you can upload a contract for signing. To do it open the customer's dashboard for editing in admin area and select **Downloads** tab from the left. By default the customer will have downloadable files created for his/her group (if available). They will be hidden.

The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with tabs for Dashboard, Sales, Catalog, Mobile, Customers (selected), Promotions, Newsletter, CMS, Reports, and System. A search bar and user information are also present. Below the navigation bar, a message bar indicates a new version of Instant Search & Suggestions is available. The main content area is titled 'Customer Information' for 'John Doe'. On the left, there's a sidebar with links to various customer-related sections. The main section shows the 'Attachments' tab with a 'Use Global' checkbox that is checked. There are buttons for 'Back', 'Reset', 'Create Order', 'Delete Customer', 'Save Customer', and 'Save and Continue Edit'.

To create a personal set of files uncheck **Use Global** checkbox. You will see the list of files for the customer group available for editing for this customer.

This screenshot shows the same Magento Admin Panel interface, but the 'Use Global' checkbox is now unchecked. The 'Attachments' section is expanded, showing a tree view with 'Root Category' and 'License Agreement'. A note states: 'Note: You can drag files between categories'. Below this, there are buttons for 'Create New Category', 'Create', 'Load Existing Document', and 'Load'. At the bottom of the expanded section, there are 'Browse Files...' and 'Upload Files' buttons.

[Upload the files](#) you need the same way as for products, [create and manage categories](#).

To hide default file(s) click the file's title. There will appear additional settings. You can unpublish the file there (it will not be visible from the front-end then) or remove it by clicking **Remove** link.

This screenshot shows the 'Attachments' section expanded further. The 'License Agreement' file is selected, and its title 'License Agreement' is visible. There is a 'Published' checkbox that is checked, and a 'Remove' link is visible next to it. The same note and buttons from the previous screenshot are also present.