



Attachment Manager for Magento 2

Online Version

An online version of this user manual can be found [here](#).

Demo Store

A demo store is available to trial the settings of this extension:

- Frontend: attachmentmanager.demo-m2.fooman.co.nz
- Backend: attachmentmanager.demo-m2.fooman.co.nz/admin

User: demo

Password: demo123

Quick Links

This User Manual is structured in the following sections:

[Install + Set Up \(User Manual\)](#)

2

Install + Set Up (User Manual)

There are two types of PDF attachments you can configure using Fooman Attachment Manager:

1. Custom PDF attachments (which you upload from your computer)
2. Transactional PDF attachments (Order*, Invoice, Shipment and Credit Memo PDF documents automatically generated in Magento).

* An Order Confirmation PDF document requires you to have the free [Fooman Print Order PDF](#) extension installed.

Configure custom PDF attachments

Custom PDF attachments are uploaded directly by you - they are not automatically generated in Magento. This can be anything you like e.g. Terms of Trade, Returns Policy, Returns Form / Shipping Label, Product Catalog, Marketing Material.

Transactional PDF attachments (Order, Invoice, Shipment and Credit Memo PDF documents automatically generated in Magento) are configured in the next step.

Click on **Marketing > Email Attachment Manager** to get started.

Email Attachment Manager Dashboard (v1.0.0+)

Add, view and edit your custom email attachments from the dashboard under **Marketing > Email Attachment Manager**.

Email Attachment Manager

15 demo

Add New Attachment

Filters Default View

4 records found 20 per page 1 of 1

	ID	Enabled	Email Type	File	Action
☐	1	Yes	Order Email	sample.pdf	Edit
☐	3	Yes	Order Email	Order_Terms_and_Conditions.pdf	Edit
☐	4	No	Order Email	Sample_Product_Catalog.pdf	Edit
☐	2	Yes	Shipment Comment Email	Returns_Policy.pdf	Edit

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Add New Attachment (v1.0.0+)



DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

STORES

CUSTOMERS

MARKETING

STORES

New Attachment

← Back

Reset

Save Attachment

General Information

Enabled

No

Email Type

Order Email

Attachment Type

File Upload

File

Choose file

No file chosen

Store *

All Store Views

Apply Group Filter

No

Groups

NOT LOGGED IN
General
Wholesale
Retailer

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Enabled (v1.0.0+)

Set to "Yes" to enable this custom attachment being sent.

Email Type (v1.0.0+)

Choose which Magento sales email type you want to add your custom attachment to.

Attachment Type (v1.0.0+)

Select "File Upload".

File (v1.0.0+)

Choose a file from your computer. It must be PDF format.

Store (v1.0.0+)

Select which store view/s for sending the custom attachment.

Apply Group Filter (v1.0.0+)

Set to "Yes" if you want the custom attachment to only be sent to particular customer group/s.

Groups (v1.0.0+)

Select the customer groups you want the custom attachment to be sent to.

Click "Save Attachment".

Configure transactional PDF attachments

Transactional PDF attachments refer to the Order*, Invoice, Shipment and Credit Memo PDF documents automatically generated in Magento. * An Order Confirmation PDF document requires you to have the free [Fooman Print Order PDF](#) extension installed.

Click on **Stores > Configuration > Sales > Sales Emails** to get started.

Individually configure every email type you see below with the PDF documents you want to automatically attach. Choose to attach PDF documents with or without comments.

Configuration

🔍 🔔 👤 admin ▾

Store View: Default Config ▾ ?

Save Config

GENERAL ▾	General Settings	🕒
CATALOG ▾	Order	🕒
CUSTOMERS ▾	Order Comments	🕒
SALES ▴	Invoice	🕒
Sales	Invoice Comments	🕒
Sales Emails	Shipment	🕒
PDF Print-outs	Shipment Comments	🕒
Tax	Credit Memo	🕒
Checkout	Credit Memo Comments	🕒
Shipping Settings		

Invoice

Enabled	Yes	▼
Invoice Email Sender	Sales Representative	▼
Invoice Email Template	New Invoice (Default)	▼
	Email template chosen based on theme fallback when "Default" option is selected.	
Invoice Email Template for Guest	New Invoice for Guest (Default)	▼
	Email template chosen based on theme fallback when "Default" option is selected.	
Send Invoice Email Copy To		
	Comma-separated	
Send Invoice Email Copy Method	Bcc	▼
Attach Invoice as PDF	No	▼ ?
Attach Terms and Conditions	No	▼ ?

Standard Magento Settings

The first six settings are standard Magento settings - configure these as per normal.

Be sure to enable automatic sales emails.

Attach Invoice/Shipment/Credit Memo as Pdf (v1.0.0+)

When set to "Yes", your invoice/shipment/credit memo pdf document will be automatically attached to the order/invoice/shipment/credit memo email.

Attach Order as Pdf (v1.0.0+)

You can also choose to automatically attach an order document to the order email. This requires the free Fooman Print Order PDF extension - you'll need to install this first in order for this feature to be enabled: [Link to free download.](#)

Attach Terms and Conditions (v1.0.0+)

When set to "Yes", your Terms and Conditions html and text files (from Sales > Terms and Conditions) will be automatically attached to the email.

Reporting Any Issues/Bugs

We are proud of our quality extension code - it's been widely tested and we stand by it 100%. If something does happen and you think you might be experiencing an issue or bug, please contact us via support@fooman.co.nz and we will help you out.