

Attach Documents to Cart

Overview

Adding the Order Documents Widget allows your customer to attach one or more documents to their order. For instance, if customisation or personalised items are included in your product offering, you may have scenarios where extra information from the customer is needed before you can fill their order. In such instances, it's helpful to offer a file upload facility in the shopping cart. These files are stored on the server and can be accessed by administrators via a link on the Order Placed email.

From version 4.37+, you will be able to add the widget to the Checkout page. This is intended for pre-paid orders, part-payment evidence or other reasons payment evidence may be needed, e.g., if you require direct deposit payment records etc. When set against a payment type, the user has to upload a document to complete order submission.

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This guide shows you how to implement this functionality on your own BPD website.

Keep Shopping

Request QuoteContinue To Checkout

Upload Files

Select file(s) to upload:

Select files...

drop files here to upload

Step-by-step guide

Add upload document in Cart

First, add the widget to the Cart template:

1. In the CMS, go to **Content Pages & Templates Checkout**.
2. Select the **Cart** template.
3. Locate where you want the Upload Files facility to be in the layout and click '**Add Widget**'.
4. Search for **Order Documents** and click '**Add Widget**'.
5. **Edit** the widget to customise document file types accepted. Format for entry: **.pdf** Separate each file type with a comma. See: [Order Documents Widget](#).

Order Documents

Search...

General Options

Common Options

Documentation

General Options

Description

Layer

Show document link (email templates only)

Valid Upload Types

Email 'Documents attached' Text

Email 'Download Files' Hyperlink Text

All Pages


☐

.pdf,.doc,.jpg

There are documents attached to the order.

Download Files

6. **IMPORTANT** - When adding this widget in the cart, 'Show document link' must be toggled OFF.
7. Click **Save**.
8. Refresh your shopping cart in another browser (or incognito window) to verify the File Uploader now displays.

 **Upload Files**
Select file(s) to upload:



Select files...

drop files here to upload

Next, add the Order Documents Widget to the Order Lines Information template. This will determine if the document is included in the Order Placed email as well as the user's Order History.


1. In the CMS, go to **Content Pages & Templates Checkout**.
2. Find the **Order Lines Info** template.
3. Click **Add Widget**.
4. Search for **Order Documents** and click **Add Widget**.
5. **Edit** the widget to customise options. See: [Order Documents Widget](#).
6. Click **Save**.

7. The link to the user's document will now appear on the Order Placed email, as well as in the user's Order History when the order details are being viewed.

Order Placed

Order Summary

Item	Qty	Price (inc GST)	Unit	Discount	Total (inc GST)
 Head TiS6 Tennis Racquet Code: CV116	1	\$248.55	Each	0.00%	\$248.55
Subtotal (inc GST)					\$248.55
Freight					\$14.00
Total (inc GST)					\$262.55
Including GST					\$23.87

There are documents attached to the order. [Download Files](#)

Order Details

Entered By: Jane Smith

Sales Order Date: 07/01/2022

Customer Reference: 12345


Warehouse Code: MEL

Delivery Address

Jane
30 Lisburn Street
East Brisbane
QLD
4169

Carrier

Australia Post (orders over \$100 to \$500)

Line	Product	Order Qty	Unit	Shipped Qty	Item Price (inc)	Per	Total (inc)
1	 Head TiS6 Tennis Racquet Code: CV116 (Each)	1	EACH		\$248.55	Each	\$248.55
Australia Post (orders over \$100 to \$500) Charges							\$14.00
Subtotal (inc GST)							\$262.55
Total (inc GST)							\$262.55
Including GST							\$23.87

Uploaded Files

- Quote No. 5667044.pdf 248.1 KB

Add upload payment document for order submission

First, add the widget to the Checkout template:

- In the CMS, go to **Content Pages & Templates Checkout**.
- Select the **Checkout** template.
- Locate the **Checkout Payment Options Widget**. In the same zone, click **Add Widget**.

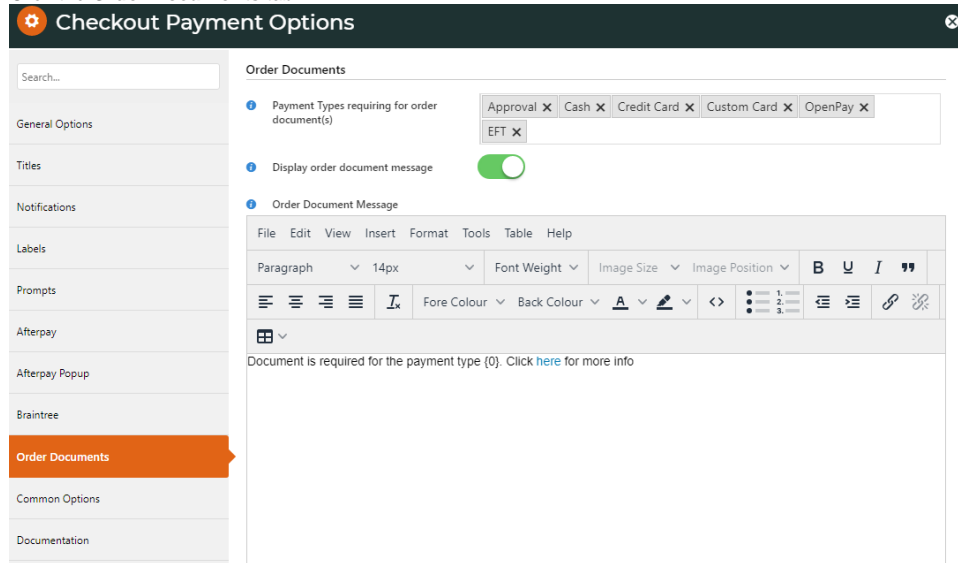
<input checked="" type="checkbox"/>	Checkout Payment Options	Edit	Options
<input checked="" type="checkbox"/>	Configure Schedule for Standing Order Button	Edit	Options

- Search for **Order Documents** and click **Add Widget**.
- Edit** the widget to customise document file types accepted. Format for entry: **.pdf** Separate each file type with a comma. Ensure 'Show document link' is toggled OFF. See: [Order Documents Widget](#).

6. **IMPORTANT** - Move the **Order Documents Widget** so that it is positioned before the **Checkout Payment Options Widget** in the same zone.

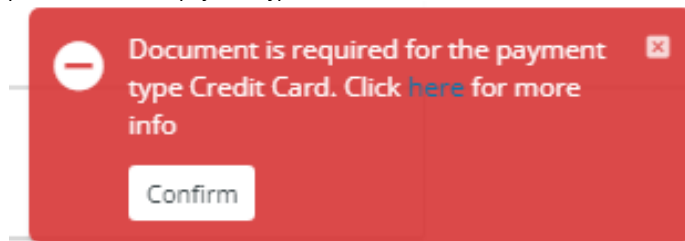
Next, edit the Checkout Payment Options Widget.

1. Click **Edit** for the **Checkout Payment Options Widget**.
2. Click the **Order Documents** tab.



The screenshot shows the 'Checkout Payment Options' configuration window. On the left is a sidebar with a search bar and a list of tabs: General Options, Titles, Notifications, Labels, Prompts, Afterpay, Afterpay Popup, Braintree, **Order Documents** (highlighted with an orange arrow), Common Options, and Documentation. The main area is titled 'Order Documents' and contains three sections: 1. 'Payment Types requiring for order document(s)' with a list of payment types (Approval, Cash, Credit Card, Custom Card, OpenPay, EFT) each with a toggle switch. 2. 'Display order document message' with a green toggle switch turned on. 3. 'Order Document Message' which includes a rich text editor with a menu (File, Edit, View, Insert, Format, Tools, Table, Help) and a toolbar with various formatting options. Below the editor, a message is displayed: 'Document is required for the payment type (0). Click [here](#) for more info'.

3. In **Payment Types Requiring Order Documents**, add one or more payment types where a document must be uploaded for order submission.
4. To display a message to alert the user a document is required, toggle ON **Display Order Document Message**.
5. If required, edit the **Order Document Message**. This message tells the user that a document must be uploaded when a customer tries to submit an order without an uploaded document. **NOTE** - The default message contains a placeholder for the payment type.



6. Click **Save**.

Add Order Document Widget to an Email Template

This widget must be added to every email template you want the link to appear. For example, you may want the link to appear in the Order Received and Order Confirmation emails. You will need to add the widget to each of these templates.

To add the Order Document Widget to an email template:

1. In the CMS, go to **Content Email**
2. Go to the email template.
3. Add the **Order Document Widget**.

4. **Edit** the widget. Ensure document file types accepted are the same as for the instance in the Checkout page. Format for entry is: [.pdf](#) Separate each file type with a comma. Ensure 'Show document link' is toggled ON. See: [Order Documents Widget](#).
5. Click **Save**.

Additional Information

Minimum Version Requirements	03.82.00
Prerequisites	--
Self Configurable	Yes
Business Function	Orders
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- [Order Documents Widget](#)
- [Checkout Payment Options Widget](#)