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.

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

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 enttry: *.pdf* Separate each file type with a comma. See: *Order Documents Widget*.

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.*

Add upload payment document for order submission

First, add the widget to the Checkout template:

1. *In the CMS, go to* **Content Pages & Templates Checkout**.

2. *Select the* **Checkout** *template.*

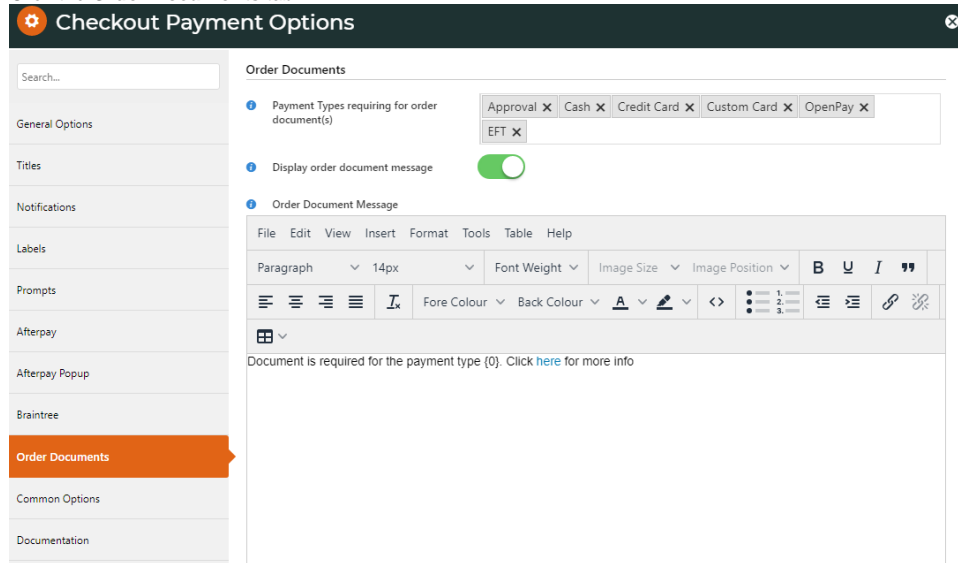3. *Locate the* **Checkout Payment Options Widget**. *In the same zone, click* **Add Widget**.

4. *Search for* **Order Documents** *and click* **Add Widget**.

5. **Edit** *the widget to customise document file types accepted. Format for enttry:* *.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.*

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.*
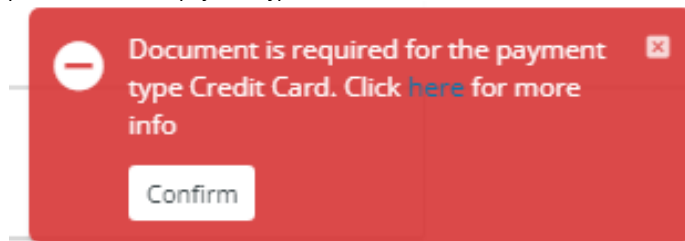
6. *Click **Save**.*

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 Comfirmation 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 enttry 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