



Enhanced Files User Guide

Version 2.0 · Last Updated: August 22, 2026

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OVERVIEW

Enhanced Files replaces the standard Files related list with a single card that makes every file on a record easy to find, act on, and keep current. Files show as tiles with real thumbnails, sizes, and dates. A search box, sort menu, and file-type filter narrow long lists in seconds, and checkboxes let you download any set of files in one action.

The component also fixes two everyday gaps in the standard related list: attachments on emails logged against the record appear alongside every other file, and the list refreshes itself automatically when a file is deleted anywhere in Salesforce — no page reload required.

Enhanced Files runs on Lightning record pages and on Experience Cloud sites, and administrators control its behavior per page: what a click does, whether users can upload or mass-download, how tall the list is, and whether the View All link shows.

Reading order: if you are setting up Enhanced Files for the first time, read **Installation** and **Adding the Component to a Record Page** first. The remaining sections describe day-to-day use and can be read as reference.

WHAT'S NEW IN VERSION 2.0

Version 2.0 focuses on finding and acting on files in bulk:

- **Sort files.** Order the list by name, date, size, or type, in either direction.
- **Filter by file type.** A funnel panel lists every file type on the record with a count, and filters the list to the types you check.
- **Select and download multiple files.** Checkboxes on every tile, a Select All control, and a Download button that fetches exactly the files you selected.
- **Configurable list height.** Administrators set how tall the file list is before it scrolls.
- **Email attachments included.** Files attached to emails related to the record now appear in the list.
- **Live refresh on deletes.** When a file shown in the list is deleted anywhere in the org, the component updates automatically.

KEY FEATURES

Find files fast

- **File count at a glance.** The header shows how many files are listed, updating as you search and filter.
- **Search.** Filter the list by file name as you type.
- **Sort.** By name, date, size, or type, ascending or descending.
- **Type filter.** Check one or more file types to see only those files, with a per-type count.

Act on many files at once

- **Selection checkboxes** on every file, plus Select All for everything currently shown.
- **Download selected.** One click downloads every selected file; multiple files arrive as a single zip.
- **Selection summary.** The header always states how many files are selected, and how many of those are showing under the active filter.

A complete Files card

- **Thumbnails and previews.** Images and documents render real thumbnails; clicking a file opens the Salesforce file preview (or downloads it, if configured).
- **Upload.** Users can add files by browsing or dragging and dropping, without leaving the record.
- **Email attachments and live updates** keep the list complete and current without page reloads.

Made for administrators

- **Per-page configuration** of click behavior, list height, upload, mass download, and the View All link.
- **Works everywhere:** Lightning record pages and Experience Cloud sites.

INSTALLATION

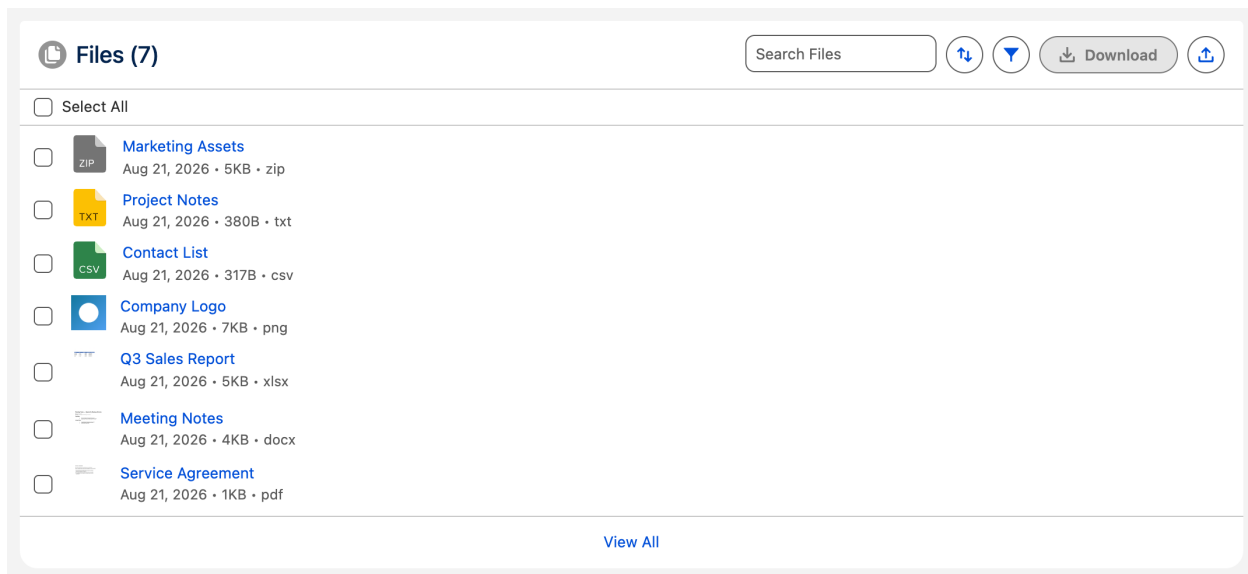
Enhanced Files is a Salesforce managed package. Install it from the AppExchange listing or an installation link, following the [Salesforce guide on how to install a package](#).

After installation:

1. **Assign the permission set.** Give users who will work with the component the **Enhanced Files User** permission set (Setup → Permission Sets → Enhanced Files User → Manage Assignments).
2. **Add the component to a page.** Follow the steps in **Adding the Component to a Record Page**.

Users see files subject to the same sharing and file-access rules as the standard Files related list; Enhanced Files never shows a user a file Salesforce would not.

USER INTERFACE OVERVIEW

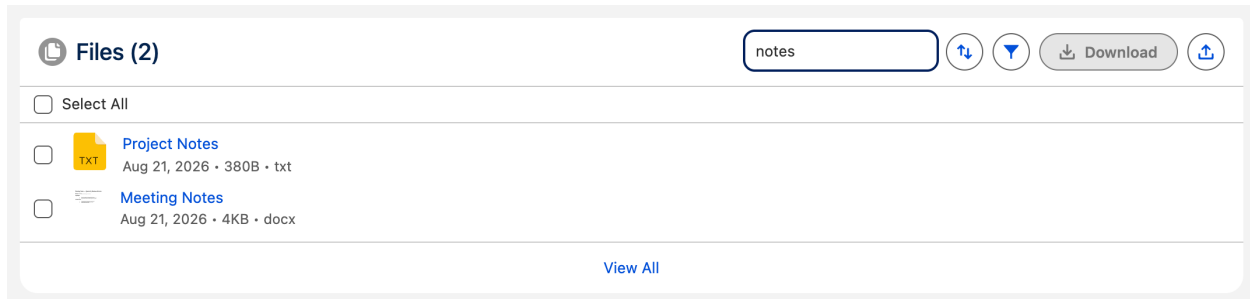


From left to right, top to bottom:

- **Files count** — the number of files currently listed, reflecting any search or filter.
- **Search Files** — narrows the list by file name as you type.
- **Sort button** (arrows icon) — opens the Sort By panel.
- **Filter button** (funnel icon) — opens the File Types panel. The icon is highlighted while a filter is active.
- **Download** — downloads the selected files. Disabled until at least one shown file is selected.
- **Upload button** (arrow icon) — shows or hides the upload panel.
- **Select All** — selects every file currently shown.
- **File tiles** — thumbnail, name, date, size, and type for each file, with a selection checkbox. The list scrolls once it exceeds the configured height.
- **View All** — opens the standard Files related list.

SEARCHING FILES

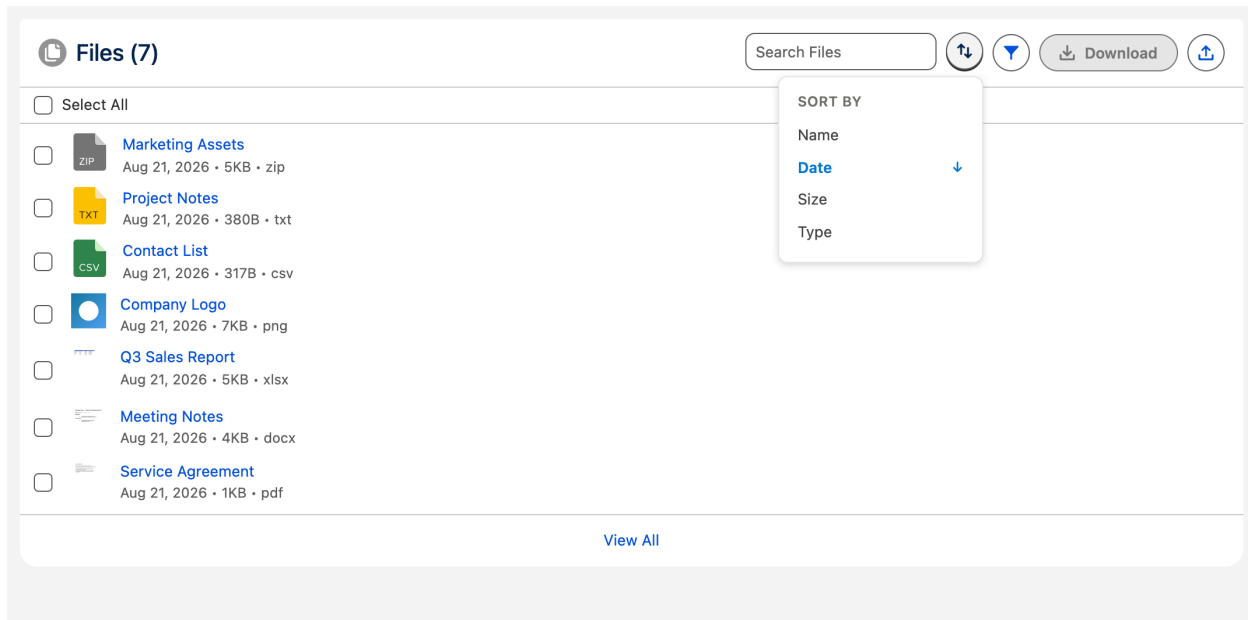
Type in the **Search Files** box to narrow the list to files whose name contains your text. The file count updates as you type; clearing the box restores the full list.



Search combines with sorting and the type filter, and selections survive a search: files you selected before searching come back still selected when you clear it.

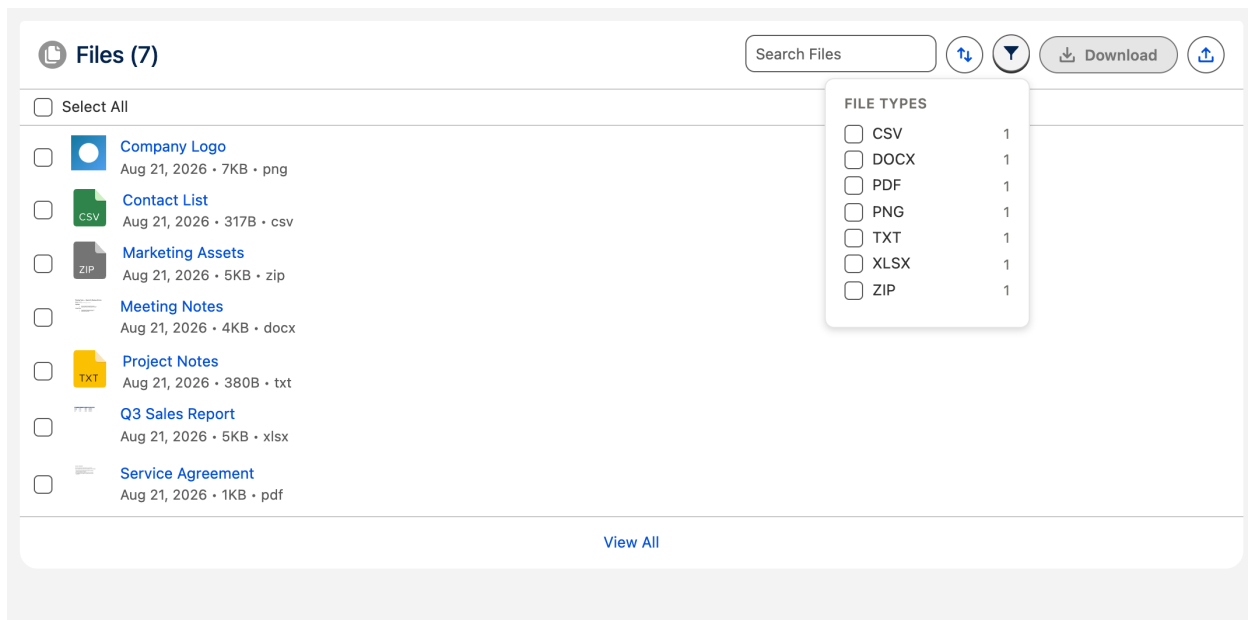
SORTING FILES

Click the sort button (arrows icon) to open the **Sort By** panel, then choose **Name**, **Date**, **Size**, or **Type**. Choosing the same option again reverses the direction; the arrow next to the active option shows the current direction.



FILTERING BY FILE TYPE

Click the funnel icon to open the **File Types** panel. Every type present on the record is listed with the number of files of that type. Check one or more types to show only those files.



The screenshot shows the 'Files (7)' panel. At the top, there is a search bar labeled 'Search Files', a funnel icon (active), a 'Download' button, and a share icon. Below the search bar, a 'FILE TYPES' panel is open, displaying a list of file types with their respective counts:

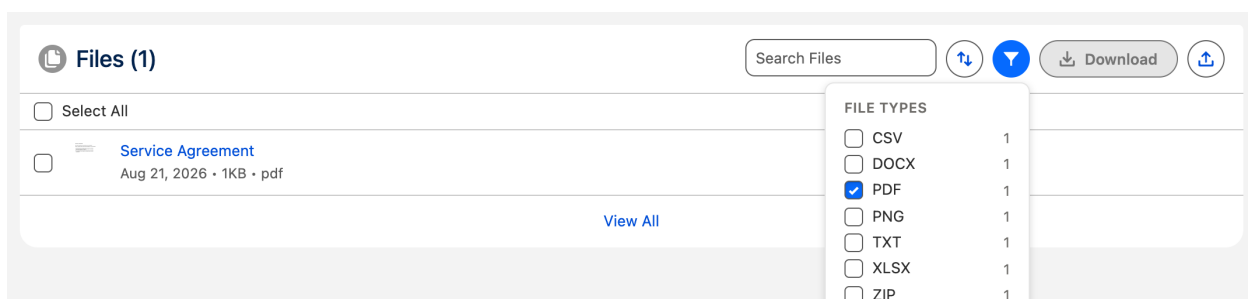
File Type	Count
CSV	1
DOCX	1
PDF	1
PNG	1
TXT	1
XLSX	1
ZIP	1

The main file list below shows seven files:

- ☐ **Company Logo**
Aug 21, 2026 • 7KB • png
- ☐ **Contact List**
Aug 21, 2026 • 317B • csv
- ☐ **Marketing Assets**
Aug 21, 2026 • 5KB • zip
- ☐ **Meeting Notes**
Aug 21, 2026 • 4KB • docx
- ☐ **Project Notes**
Aug 21, 2026 • 380B • txt
- ☐ **Q3 Sales Report**
Aug 21, 2026 • 5KB • xlsx
- ☐ **Service Agreement**
Aug 21, 2026 • 1KB • pdf

A 'View All' link is located at the bottom right of the file list.

While a filter is active the funnel icon stays highlighted, and a **Clear** link in the panel removes all type filters at once.



The screenshot shows the 'Files (1)' panel. The funnel icon is now highlighted in blue. The 'FILE TYPES' panel is still open, and the 'PDF' option is now checked:

File Type	Count
☐ CSV	1
☐ DOCX	1
☒ PDF	1
☐ PNG	1
☐ TXT	1
☐ XLSX	1
☐ ZIP	1

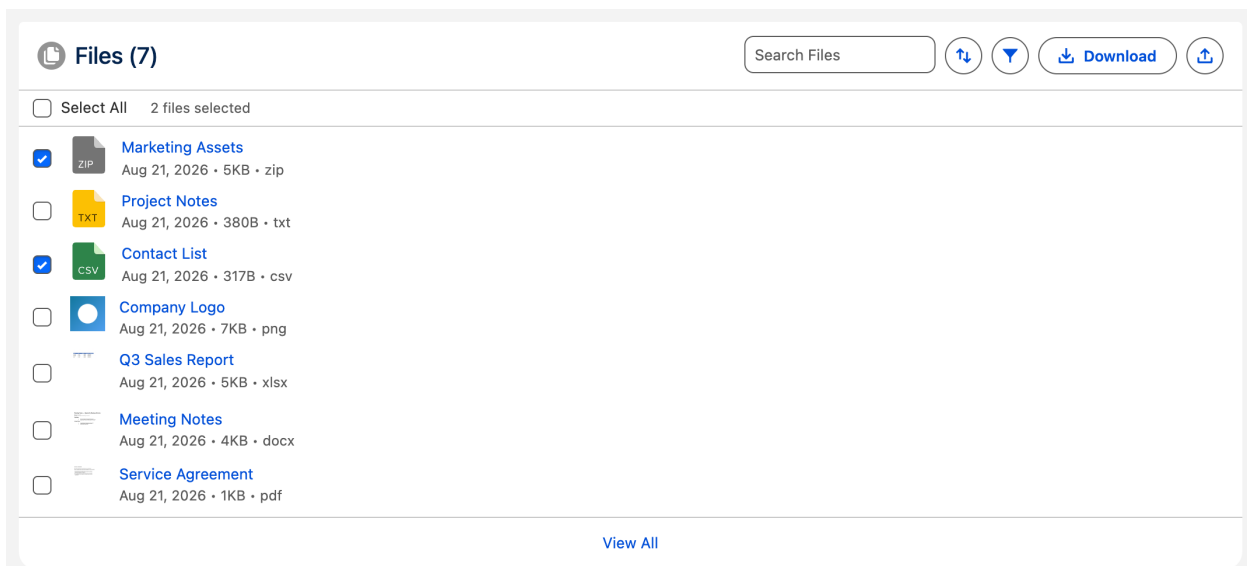
The main file list now only shows one file:

- ☐ **Service Agreement**
Aug 21, 2026 • 1KB • pdf

A 'View All' link is located at the bottom right of the file list.

SELECTING AND DOWNLOADING FILES

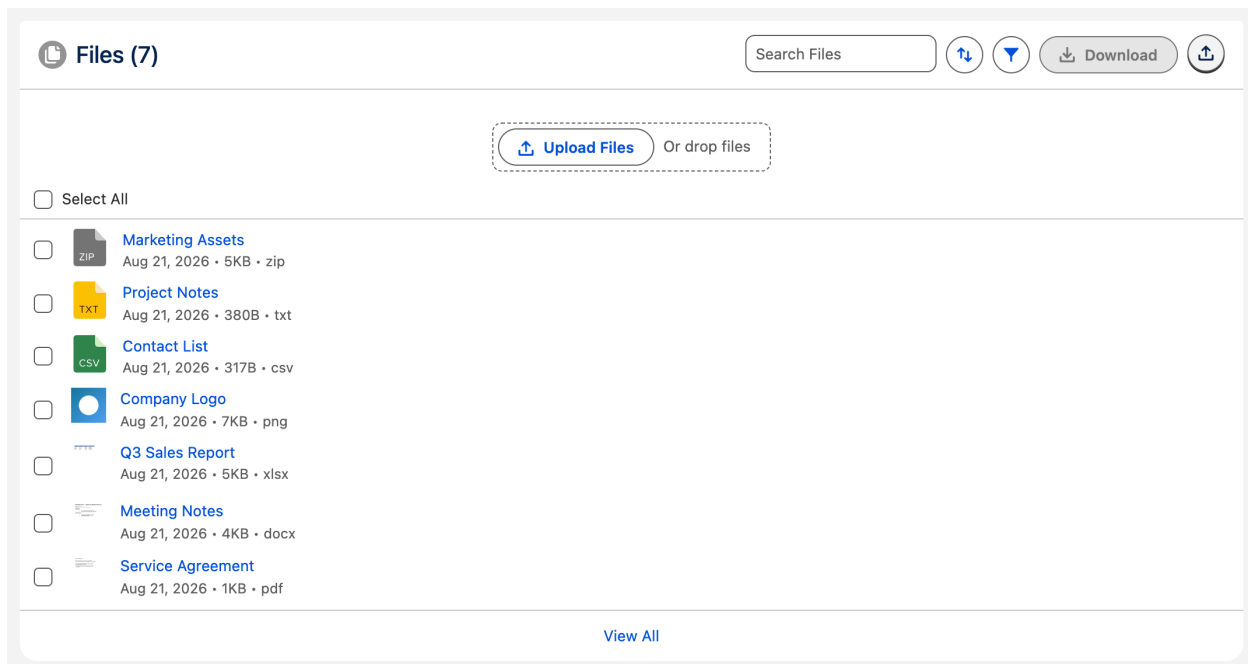
Every file tile has a checkbox, and the **Select All** checkbox selects everything currently shown — it respects any active search or filter. The bar under the header summarizes the selection, and the **Download** button fetches the selected files; multiple files download together as a single zip.



If a search or filter hides files you selected earlier, they stay selected but are not downloaded — the summary reads, for example, "4 files selected · 2 showing", and Download acts on the 2 that are showing. Clear the search or filter to bring the rest back.

UPLOADING FILES

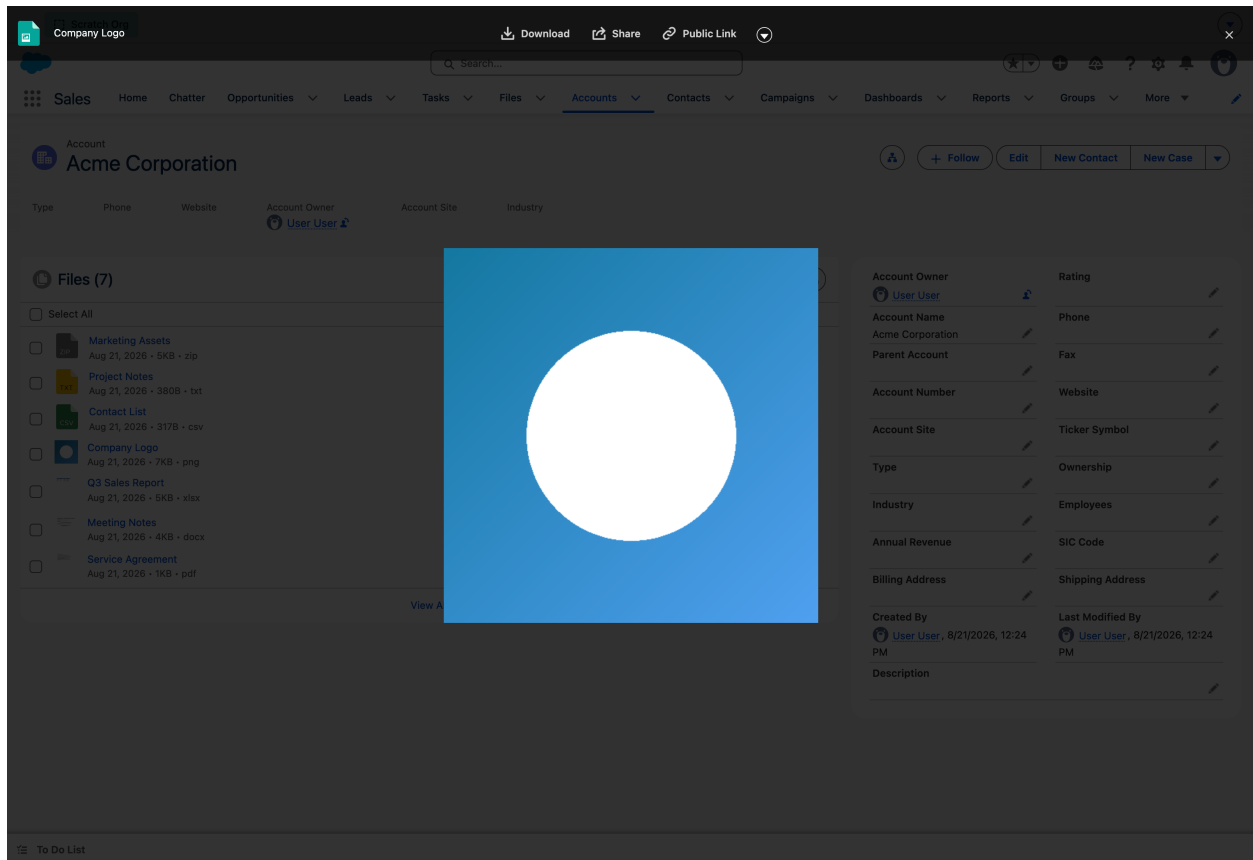
Click the upload button in the header to reveal the upload panel, then browse with **Upload Files** or drag files onto the drop zone. You can upload several files at once; the list refreshes automatically when the upload finishes.



The upload panel is available only when the administrator has enabled **Allow File Upload** on the page.

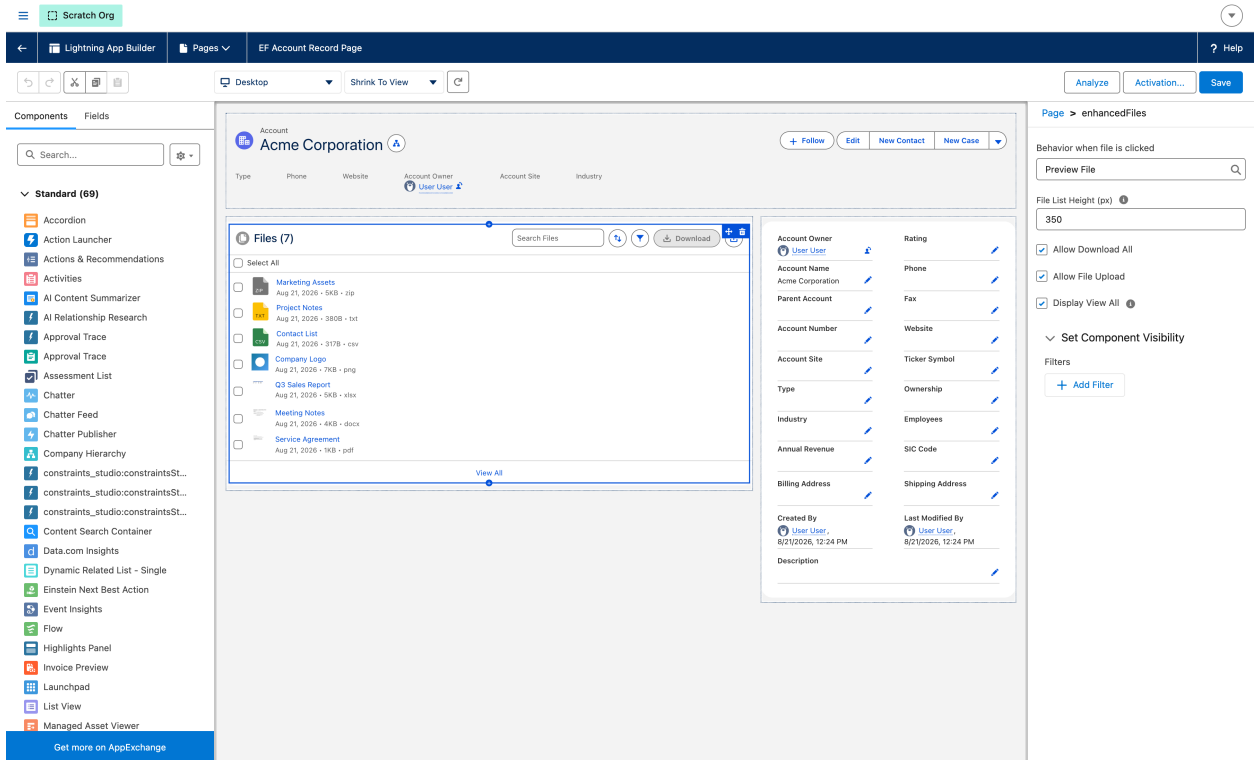
PREVIEWING FILES

By default, clicking a file opens the standard Salesforce file preview, with its own controls for downloading, sharing, and public links. Administrators can instead configure the click to download the file immediately (see **Adding the Component to a Record Page**).



ADDING THE COMPONENT TO A RECORD PAGE

3. Open a record of the object you want, click the setup gear, and choose **Edit Page** (or open Setup → Lightning App Builder and edit the page).
4. In the Components panel, under **Custom – Managed**, drag **enhancedFiles** onto the page. Most teams remove the standard Files related list from the same region.
5. Select the component to configure it (see below).
6. Save the page and, if it is new, activate it.



The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes 'Scratch Org', 'Lightning App Builder', 'Pages', and 'EF Account Record Page'. The main workspace displays the 'Acme Corporation' record page. On the left, the 'Components' panel shows a list of components under 'Standard (69)', with 'enhancedFiles' selected. The right sidebar shows the configuration for the 'enhancedFiles' component. The configuration includes a 'Behavior when file is clicked' section with a search bar for 'Preview File', a 'File List Height (px)' input set to 350, and checkboxes for 'Allow Download All', 'Allow File Upload', and 'Display View All'. Below this is a 'Set Component Visibility' section with a 'Filters' input and an 'Add Filter' button. The main workspace shows the 'Acme Corporation' record with a 'Files (7)' list and a 'User Owner' details panel.

Available configuration:

- **Behavior when file is clicked** — **Preview File** opens the standard file preview; **Download File** downloads the file immediately.
- **File List Height (px)** — how tall the file list is before it scrolls. Default 200, minimum 100.

- **Allow Download All** — shows the selection checkboxes, Select All, and the Download button.
- **Allow File Upload** — shows the upload button and panel.
- **Display View All** — shows the View All link.*

*The View All link opens the standard Files related list. For it to work, the Files related list must be present on the object's page layout (it does not need to be on the Lightning page). If you prefer not to keep it on the layout, turn Display View All off.