

Installation - Setup Guide for Administrators

1. purpose

This document is intended to help the File Manager for Salesforce system administrator properly set up the app and make it available to users after installing the File Manager for Salesforce managed package from the AppExchange,

Salesforce System Admin to properly set up the app and make it available to users.

2. App overview

File Manager (the "app") is a Lightning Web Component-based app that makes it easier to manage files within Salesforce.

Key features include

- View a list of files associated with the current record (Account, Opportunity, etc.)
- Download individual files
- Export ZIP feature to select multiple files and compress them into a ZIP file
- Extract to unpack the files inside the ZIP file into Salesforce as individual files
- Mass Delete feature to delete multiple files at once
- Toggle the public/private status of a file and enable/disable buttons based on the public status.

Security attributes

- Only uses ContentDocument / ContentVersion / ContentDocumentLink

- All data is processed only inside Salesforce Org, no external servers or external storage is used
 - Follows Salesforce's standard security/sharing model (OWD, Sharing Rule, Role Hierarchy, etc.)
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3. Pre-installation requirements

- Permissions
 - Salesforce System Administrator profile
 - Permission to install AppExchange packages
- Enable Files functionality
 - The Salesforce Files feature must be enabled (enabled by default).
 - If required, verify the settings in the following order
 1. Enter **Setup** (click the gear → Setup)
 2. Type **Salesforce Files** in the left search bar
 3. Click the **Salesforce Files Settings** or **Files → General Settings** menu
 4. **Check the** following options

"Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments"

Salesforce Files Settings

Use this page to modify Salesforce Files settings for your organization.

- ☒ Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments [i](#)
- ☒ Libraries in Salesforce Files. [i](#)
- ☒ Skip triggers execution when deploying asset files [i](#)
- ☐ Skip triggers execution and validation rules on asset files [i](#)
- ☐ Display alternative file previews [i](#)
- ☐ Allow site guest users to upload files [i](#)
- ☐ Set file access to Set by Record for files attached to records [i](#)
- ☒ Use the File Upload Lightning web component for LWR sites [i](#)
- ☐ Use the File Upload Lightning web component for Flows [i](#)
File Upload Lightning web component for Flows is a pilot or beta service that is subject to the Beta Services Terms at [Agree](#) Customer's sole discretion.
- ☒ Enable Files to be ingested into Data Cloud [i](#)

4. Install the package

1. Navigate to the File Manager for Salesforce package page available on the AppExchange.
2. Select the Salesforce Org (Production or Sandbox) you want to log in to.
3. Click the Install button.
4. Select the installation audience
 - We recommend the Install for Admins Only option.
 - You can then open permissions via Permission Set (FileManager_User) to only those users who need them.
5. When the installation is complete, check Setup → Installed Packages to see if "File Manager for Salesforce" is installed.

Package Details
File Manager

Installed Package Detail Uninstall View Components View Dependencies

Package Name	File Manager	Version Number	1.3
Language	English	First Installed Version Number	1.1
Version Name	Winter 25	Package Type	Managed
Namespace Prefix	nbfn	Modified By	, 2025. 11. 28. AM 10:51
Version Setting	packageld		
Package	033TJ000001Vgon		
Publisher	Newbrick Co. Ltd		
Description	Simple, one-click file manager for Salesforce with mass download, ZIP export/extract, and easy file security controls on every record.		
Installed By	, 2025. 11. 26. PM 3:09		
Count Towards Limits	☒	Tabs	0
Apps	0	Objects	0

5. Permission Setting Guide

You need to set the permission set for the File Manager user manually.

- Setup → Permission Sets → FileManager_User → Manage Assignments → Add Assignments

... > SETUP > PERMISSION SET 'FILEMANAGER_USER'

FileManager_User

Current Assignments ✎ 🗑 Add Assignment

☐ Full Name ↑	Active	Role	Profile	User License	Expires On
☐ App Tester	✓		Standard User	Salesforce	

6. Add File Manager to the Lightning Record Page

File Manager is used by adding it as a component to a Lightning Record Page.

Example: Adding to an Opportunity record page

1. Navigate to Setup → Object Manager → Opportunity → Lightning Record Pages.
2. Select an existing layout and click Edit, or create a new page.
3. On the Lightning App Builder screen, locate the component in the Components list on the left.
 - File Manager
4. Drag and drop it to the desired location (e.g., within a tab, in the right area, etc.).
5. Save and, if necessary, Activate to make it the default layout.
6. Access the actual Opportunity record screen and verify that the File Manager is displayed normally.

You can use the same method to place the File Manager on Account, other Custom Objects, etc.

The screenshot displays the Salesforce Lightning App Builder interface. At the top, the navigation bar shows 'Lightning App Builder', 'Pages', and 'Opportunity Record Page'. Below this, there are icons for undo, redo, delete, and a 'Desktop' view selector. The left sidebar contains a 'Components' list with a search bar. Under the 'Custom (0)' section, 'No components available.' is shown. Under the 'Custom - Managed (1)' section, the 'File Manager' component is listed and highlighted with a blue box. A blue arrow points from this box to the 'File Manager on Salesforce' component in the main layout area. The main layout area shows a record page for an Opportunity. The 'File Manager on Salesforce' component is placed in the 'Details' section, below the 'Opportunity Owner' and 'Close Date' fields. The component displays a list of files, including 'report_pharmacovig001_93...', '데이터_시를 활용한 물가 예측 경...', '商品集材', 'downloadTranslations (27)', and 'Newbrick_cover'. The 'Files' tab is selected, showing a list of files with their names, sizes, and upload dates. The 'Related' tab is also visible.

7. Add a list of related Files to the page layout

Clicking on a File Manager header (e.g. "Files (n)" or "n files") will take you to the standard file-related screen for that record.

For this feature to work:

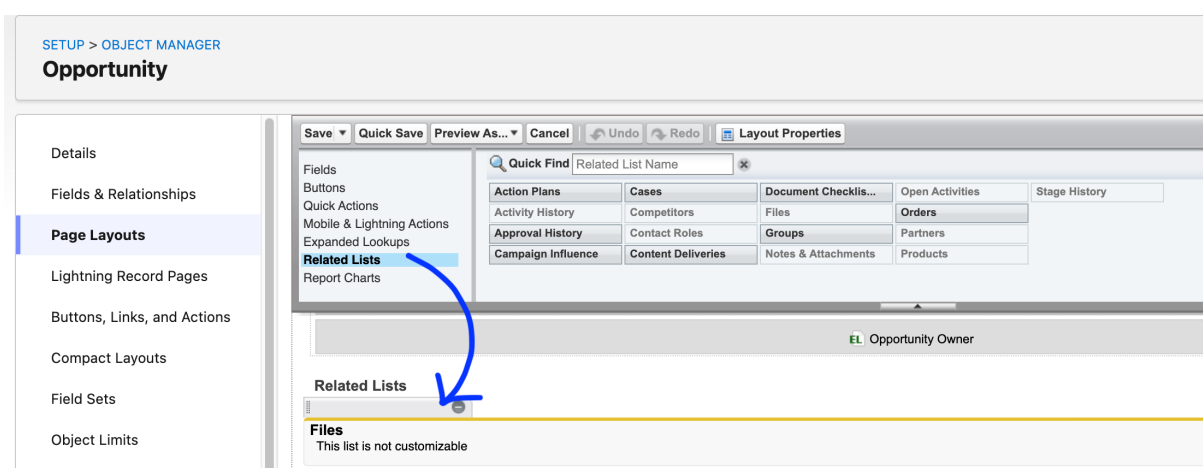
- Files-related lists must be added to the page layout for that object.

How to set it up

1. Setup → Object Manager → Target object (Account, Opportunity, etc.) → Page Layouts
2. Select the layout you use → Edit
3. Find File in the Related Lists area and drag it to the layout
4. Click Save

Caution.

- If the Files related list is not in the layout, you might see the standard Salesforce error message "the related list you're trying to view isn't in the layout" when you click the File Manager header.
- This is not an app error, but a Salesforce default behavior based on missing page layout settings.



8. Basic usage flow from a user perspective

Organize a simple usage flow for System Admin to explain when training users.

View a file

- On the record screen, view the File Manager area.
- You will see a list of files associated with that record.

Download a file

- Click the Download icon/button for the desired file in the list to download the file directly through your browser.

Export ZIP

- If you select multiple files and press the Export ZIP button, the selected files will be compressed into a single ZIP file.
- The created ZIP file can be downloaded again from the file list.
- The Export ZIP feature is not available on mobile.

Extract ZIP

- Upload a ZIP file and run the Extract function to create individual Salesforce files from the files contained within the ZIP.

Mass Delete

- Available only to users with delete permissions.
- Select the files you want to delete and then click the Mass Delete button to delete the selected files at once.
- Deleted files are disposed of according to the Salesforce Recycle Bin policy.

Control buttons based on Private / Public status

- If a user does not have access to a specific file, the
 - Delete / Export ZIP / Extract / Mass Delete buttons might be disabled or not displayed.
- This behavior is based on the Salesforce standard security/sharing model.

9. Multi-language support

- The File Manager will be relabeled according to the Salesforce user language setting.
- English, Korean, Japanese, and Traditional Chinese are supported.

- When you change your User Language, the translated buttons and labels in File Manager will appear in that language.
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10. Frequently asked questions (FAQ)

1. I don't see the File Manager component
 - Make sure the File Manager is placed on the Lightning Record Page
2. If you don't see the Export Zip button on mobile
 - Export ZIP functionality is not available on mobile
3. Error message when clicking on the File Manager header
 - If you see the message "the related list you're trying to view isn't in the layout"
 - Check if Files(AttachedContentDocuments) related list is added to the page layout