



CARTULARIUS

DOCUMENT MANAGEMENT

Release Notes

Release Notes

Version 3.48 (December 5, 2025)

New Editions of Cartularius

With this release, Cartularius is now available in three editions to better match different business needs:

- **Core Edition** (default on AppExchange):

Extends Salesforce Files with advanced folder hierarchy, automated folder creation, and export capabilities.
- **Professional Edition:**

Offers many premium features, providing a comprehensive, integrated solution with the option to store files on Amazon S3.
- **Enterprise Edition:**

Includes all functionality, with advanced customization and system integration options.

This edition structure is the primary focus of this release, ensuring that every organization can choose the level of functionality that fits their requirements.

New and Updated

- **Files Management:**
 - Manage Salesforce Files directly within the Files and Folders component.
- **Amazon S3 Integration:**
 - Enable or disable Amazon S3 storage. When both S3 and Salesforce Files are active, uploads are stored in S3 by default. [only available for Professional and Enterprise editions]

- **Sharing Enhancements:**
 - New *Controlled by Parent Record* sharing method, aligning file access with the related record.
 - Removed *Public Read/Write* and *Public Read Only* options to improve security.
 - Sharing rules are now recalculated during the Daily Maintenance Process, with a new [Recalculate Shares] button in CDM Settings.
 - Files can now also be shared using standard Salesforce Sharing.
- **Personal Space:**
 - Added a private storage area for personal documents.
- **User Actions:**
 - Cut, copy, and rename folders directly from row actions.
 - Remove a shortcut from a record without deleting the underlying file.
- **File Preview & Uploads:**
 - The File Preview component can now be added to any Lightning page to instantly preview files.
 - Upload errors now display the folder path label for easier troubleshooting.
 - Salesforce Files uploaded by processes are automatically visible in Cartularius.
 - Full-size previews available on File and File Version Lightning pages. [only for Professional and Enterprise editions]
 - Expanded file preview support (json, yml, yaml, md, txt, log, tex, ini, csv, rtf, html, htm, docx, png, jpg, jpeg, pdf). [only available for Professional and Enterprise editions]
- **Administration & Security:**
 - File Handling Mode is now a general admin setting in CDM Settings.
 - Custom permissions created for all major features (e.g., Download, Create, Edit in Office) for fine-grained access control.
 - Automated App Registration for seamless access to the Cartularius Web Service.

Bug Fixes

- Improved caching of folder hierarchy for faster navigation.
- Fixed errors when opening records with over 100 related contacts.
- Resolved issues deleting empty folders after moving them.
- Fixed breadcrumb navigation for folders and records.
- Corrected the header display in the folder delete modal.
- Standardized button labels in confirmation dialogs.
- Removed obsolete [Update Parent Folder Batch] button from CDM Settings.

Version 3.9 (June 12, 2025)

New and Updated

- We have added the ability to copy or move files using Salesforce Flow or Custom Apex.
- We have added the ability to create a new folder using Salesforce Flow or Custom Apex.
- We have added the ability to translate and view folder names in multiple languages.
- We have added the ability to support very large file and folder paths with maximum depth of 50 folders and 255 characters per level.

Bug Fixes

- Fixed: When clicking "Analyze Categories", the folder component will now be shown correctly.
- Fixed: When sending an email from a Contact record, we won't get an SendEmail error anymore.
- Fixed: Downloads from an External Link Bundle will not crash.
- Fixed: Various major and minor issues to improve overall stability and performance.

Version 2.101 (February 11, 2025)

New and Updated

- We have added the ability to be able to copy, move, and duplicate files that are larger than 5GB.
- We have added the ability to check and fix Folder Links using the Check Folders button.
- We have added handling of the [Escape] and the [Enter] keypresses to cancel or accept changes in modals like the New Folder modal.
- We have added the functionality to make a specific version of a document the current version.
- We have added the functionality to duplicate a file.
- We have added the functionality to attach files to a CollaborationGroup.

Bug Fixes

- Fixed: File Category can now be removed using the Edit File Details modal.
- Fixed: Apex time limit exception when importing hundreds of records that are part of the Auto Folder Creation process.
- Fixed: Uploads of files larger than 40GB
- Fixed: Various major and minor issues to improve overall stability and performance.

Version 2.68 (September 13, 2024)

With this version, we have rebranded Virtual Private Storage as Cartularius to better reflect its expanded functionality. Cartularius is now a mature document management system with robust features, including Office 365 integration, ChatGPT-powered categorization, and much more.

New and Updated

- We have updated Amazon's file key structure to use the Salesforce ID instead of the record name. This prevents the need to move files when renaming Salesforce records and enhances future consistency.
- We have added a welcome screen when launching the app to provide important information and tips, enhancing the overall user experience.
- We have introduced a user settings dialog to enable future customization of the app according to your preferences. For now, it includes the option to set the interval for displaying the welcome screen.

Bug Fixes

- Fixed: Various major and minor issues to improve overall stability and performance.

Version 2.25 (January 23, 2024)

New and Updated

- We have implemented an integration with ChatGPT to analyze uploaded Word documents and automatically determine the correct file category. This allows files to be uploaded directly into the appropriate folder, saving time and effort.
- We have added functionality that allows ChatGPT to create concise summaries of Word documents. This enables you to find files more efficiently using Einstein Search based on their content.
- We have added a new feature that allows you to easily export files and entire folder hierarchies into a structured zip file, simplifying data transfer and backup.
- We have added the ability to upload entire folder hierarchies, including all files, using a simple drag-and-drop function, making file organization faster and easier than ever.
- We have added cut, copy, and paste functionality to the Files & Folders component, allowing you to quickly move or copy files and folders to different locations or even other Salesforce records.
- We have implemented drag-and-drop functionality in the Files & Folders component, making it easy to move files or folders within the folder hierarchy of a Salesforce record.
- We have optimized the uploading process for large volumes of files, significantly increasing speed and stability to ensure smoother and more efficient uploads.
- We have improved the upload process to support files larger than 5GB, enabling you to handle and store large documents with ease.

Bug Fixes

- Fixed: Various minor issues to improve overall stability and performance.

Version 2.0 (March 15, 2023)

New and Updated

General

- We have added Office 365 integration, allowing users to open, edit, and create Microsoft Word, Microsoft Excel, and Microsoft PowerPoint files directly from within the app.
- We have enhanced our Amazon S3 library to improve security, stability, and performance.
- We have introduced Audit Logs, a feature that tracks and records all actions performed on files, providing a comprehensive activity trail. This ensures transparency, security, and accountability for all document-related activities.
- We have moved all customers to a per-user subscription plan and removed all functional restrictions from the previous subscription tier-based plan, allowing all customers to have the same app experience.

Bug Fixes

- Fixed: Various minor issues to improve overall stability and performance.

Version 1.16 (November 11, 2022)

New and Updated

General

- Changed all `window.alert()` and `window.confirm()` occurrences to the newly released `LightningAlert` and `LightningConfirm` components.
- A confirmation message asking to download # files when downloading multiple files or folders will be shown.
- The File Version related list on the File object is now sorted using the descending version number in the page layout.
- Merging files with different extensions is now prevented.

Files and Folders Component

- We have added the Owner column to the component.
- Optimized the height of the component.
- Added a setting to control the height of the component based on the availability of the utility bar
- Optimized the initial column widths.
- A background message is shown when the selected folder has no underlying files or folders.

Files Upload

- We have added the ability to upload folders into VPS using drag-and-drop.
- The Folder selection of the Upload Files modal was limited to 3 levels. This limit is removed.
- When uploading multiple files, only one message is shown when all uploads have been completed to prevent an overload of toasts.
- If available, the "recently used" file categories section will always show five file categories.
- The "other" file categories section is transformed into an "all" section containing all allowed file categories.

- We have added the ability to use the keyboard to scroll through the file categories section quickly.

Bug Fixes

- Fixed: When clicking the show/hide button, the Indirect Related Folders in the folders section of the Files & Folders component sometimes disappear on an Indirect Related Folder from Junction Object record.
- Fixed: It is impossible to open a folder using the Files & Folders section of the Files & Folders component on an Indirect Related Folder from Junction Object record.
- Fixed: When merging files, the file name of the first version in the list will be chosen, not the intended base file.
- Fixed: The Import Attachments modal only shows attachments from incoming imported mail, not from imported mail that has been sent.
- Fixed: In the Merge Files modal, when clicking the Cancel button on the confirmation question, the Merge button stays disabled.
- Fixed: When uploading a file into an Indirect Related Folder, sometimes the selected folder changes to the root folder.
- Fixed: When copying or moving a file without a file category, you can't click the Copy/Move button unless you select a file category, even when there's no file category restriction on the destination folder.
- Fixed: When there is no file category restriction on a folder, but there is an sObject dependency set up, only file categories that match the dependency settings should be shown.
- Fixed: The overflow of the file category combobox is invisible in the Edit Details modal.

Version 1.10 (September 5, 2022)

New and Updated

General

- We have added the possibility of merging multiple files (and their file versions) into a single file with multiple file versions.

- When opening the generic used Modal component, the focus will be on the first element.
- When a PDF file with the extension in capital letters is opened, it will now be previewed instead of being downloaded immediately.
- We have changed the default state for removing ContentVersion records to off in the Outlook Import component.
- Changed the Folder Lightning Record Page Template to Header and One Region.

Files and Folders Component

- Improved the auto-sizing of columns.
- Disable drag-and-drop from the Folders.
- It is now possible to copy or move a file to another record.
- Implemented the ability to download a complete folder.

Files Upload

- The File Category selection can now be configured per sObject.
- The File Category selection will show the five recently used File Categories on top for easy selection.
- The File Category will be selected by default when uploading a new File Version.
- Uploading a file over a file marked for deletion or hidden previously is now possible.

Auto Folder Creation Process

- The Auto Folder Creation process is now implemented for the Assert, Campaign, Event, Product2, Solution, Task, and User standard objects.
- When enabling the Auto Folder Creation process, folders are created according to the current Auto Folder Creation Object and Folder configuration.
- Improved the handling of errors when enabling the Auto Folder Creation process for an sObject that doesn't have a correct Object or Folder configuration.
- When creating or updating an Auto Folder Creation Folder, all trailing (/) characters are removed from the Parent Folder field.

External Link Bundles

- You can start typing directly in the Select Contact field in the Create External Link (Bundle) Modal instead of having to first erase the prefilled text with the adjacent button.
- Implemented the check for strong passwords when updating the External Link Bundle password.

Email Composer

- We have added the possibility of adding any related file as an attachment.
- We have added the possibility of adding an email address directly in the To, Cc, and Bcc fields.
- The Email Composer will now be closed after the email has been sent.

Bug Fixes

- Fixed: The Files & Folders component doesn't crash anymore when opening a folder containing a file without an extension.
- Fixed: A user-friendly error message is shown instead of throwing a component error when previewing a file without an extension.
- Fixed: It is now impossible to start uploading a file when a File Category is required and isn't selected.
- Fixed: (Indirect) Related Folders will now refresh correctly when clicking the Refresh button in the Files & Folders component.
- Fixed: Show the correct error message when trying to delete a file for which you don't have the proper authorization to delete.
- Fixed: You're now allowed to add a (.) after the file extension when renaming a file without running into a component error.
- Fixed: Users can now open the Email Composer component without the system permission "View Setup and Configuration"
- Fixed: Show a friendly error message when trying to preview a file containing the characters (#), (%), (+), (?), or (\).
- Fixed: It is now possible to drag an attachment from Outlook to Salesforce without an error message.

Version 1.1 (June 21, 2022)

New and Updated

- Removed password from package

Version 1.0 (June 21, 2022)

- Initial version

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