

Enhanced Files - User Guide

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Overview

Introducing "Enhanced Files" – a game-changing tool for Salesforce that transforms the traditional Files List View into a powerhouse of efficiency. With a host of improvements, this app streamlines your document management experience. Downloading all files at once becomes a breeze, while a quick indication of the total number of files keeps you informed at a glance. The scrollable related list ensures seamless navigation through your attachments, and a rapid search filter lets you pinpoint specific files effortlessly. Administrators have the flexibility to tailor the component's behavior through easy configuration. Exciting upcoming features include the ability to edit and delete files directly from the list view, as well as the option to relate files to other records with unparalleled ease. Upgrade your Salesforce experience with Enhanced Files, where enhanced functionality meets unmatched convenience.

This User Instruction Manual serves as your comprehensive guide to harnessing the full potential of "Enhanced Files," enabling you to optimize document management within your Salesforce environment.

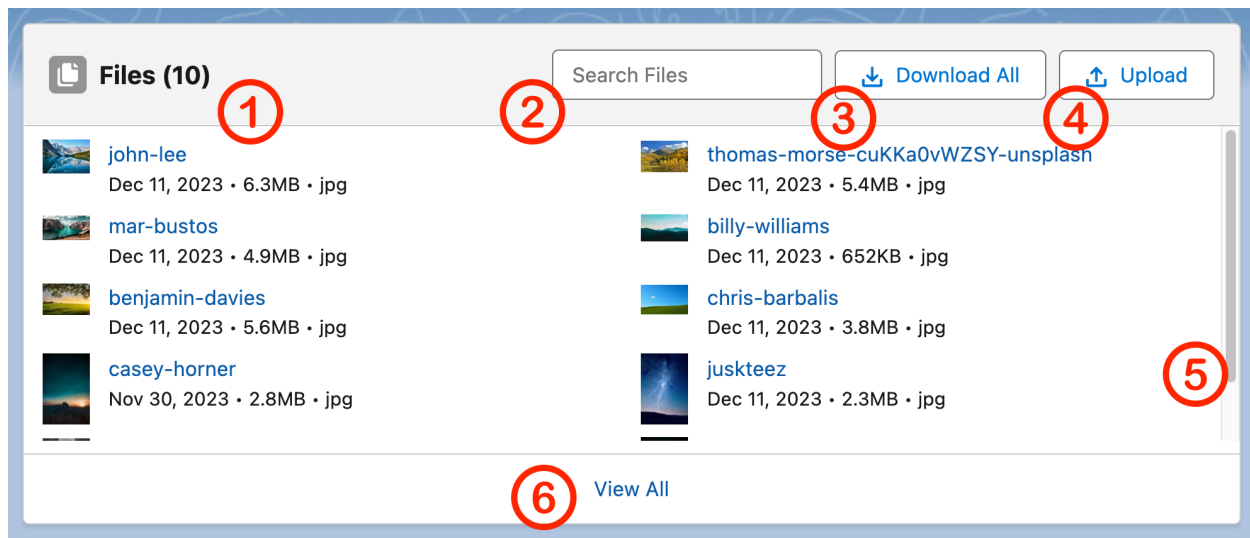
Key Features

1. **All the functionalities from the out-of-the-box File related list**
2. **File Downloading**
 - a. Seamlessly download all files at once for enhanced efficiency.
3. **File Count Indication**
 - a. Stay informed at a glance with a rapid indication of the total number of files.
4. **Scrollable Related List**
 - a. Experience seamless navigation through attachments with a scrollable related list.
5. **Search Filter**
 - a. Pinpoint specific files effortlessly using the quick and intuitive search filter.
6. **Administrator Configuration**
 - a. Administrators can easily tailor the component's behavior through simple configuration options.

Installation

"Enhanced Files" is a Salesforce Managed Package. You can install it following the [Salesforce guide on how to install a package](#).

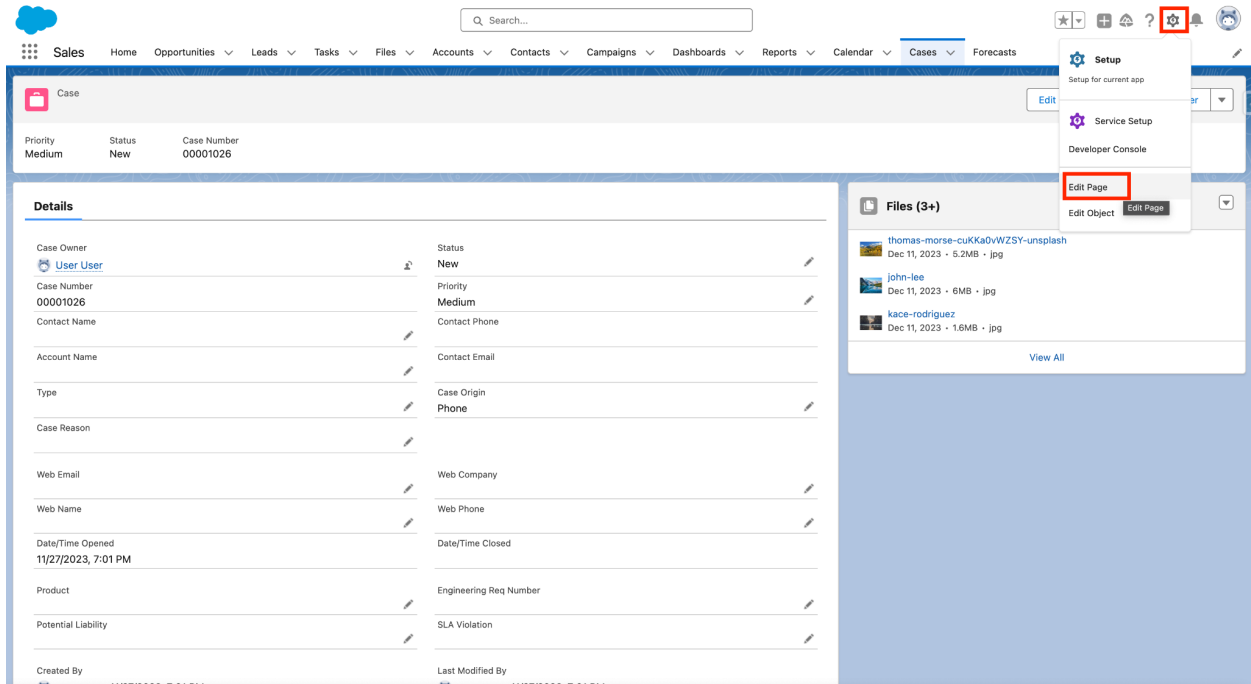
User Interface Overview



- 1. File Count Indication:** number of files being displayed in the component. The number will vary depending on the search filter.
- 2. Search Filter:** filter files being displayed by name.
- 3. Download All button:** download all files in a zip file.
- 4. Upload button:** allows users to upload files.
- 5. Scrollbar:** allows users to scrow up and down to see all files displayed in the component.
- 6. View All link:** takes the user the the out-of-the-box Files related list.

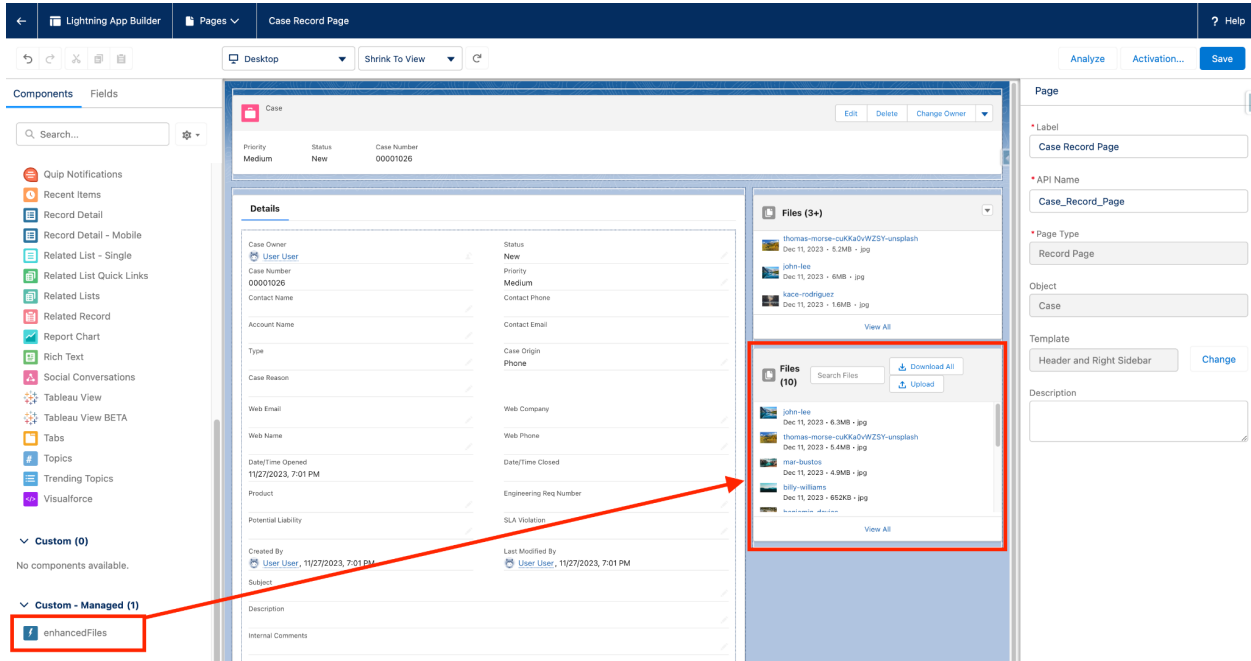
Initial Configuration

1. Edit the lightning page you want to use the Enhanced File component



The screenshot shows the Salesforce Lightning interface. At the top, there's a navigation bar with a search bar and various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Calendar, Cases, and Forecasts. The 'Cases' tab is selected. Below the navigation bar, there's a 'Case' record header with fields for Priority (Medium), Status (New), and Case Number (00001026). The main content area is divided into two sections: 'Details' on the left and 'Files (3+)' on the right. The 'Details' section contains a form with various fields for case information, including Case Owner, Case Number, Contact Name, Account Name, Type, Case Reason, Web Email, Web Name, Date/Time Opened, Product, Potential Liability, Created By, and Last Modified By. The 'Files' section shows three files uploaded by different users. A red box highlights the 'Edit Page' option in the top right corner of the interface, which is part of the 'Setup' menu.

- On the "Components" tab under "Custom - Managed", drag and drop the enhancedFiles component to the lightning page and remove the out-of-the-box Files related list



- Configure the component behavior (optional)

Page > enhancedFiles

Behavior when file is clicked

Preview File

☒ Allow Download All

☒ Allow File Upload

☒ Display View All ⓘ

▼ Set Component Visibility

Filters

+ Add Filter

Available Configuration:

1. **Behavior when file is clicked**
 - a. Preview File: opens the out-of-the-box file preview
 - b. Download File: automatically downloads the file
2. **Allow Download All:** displays the "Download All": button
3. **Allow File Upload:** displays the "Allow File Upload" button
4. **Display View All*:** displays the "View All" link.

*The "View All" link takes the user to the out-of-the-box Files List View. For the link to work, the out-of-the-box Files related list must be included in the page layout (It does not need to be included in the lightning page). If you do not want to include the out-of-the-box Files related in the page layout, we recommend not displaying the "View All" link on the "Enhanced Files component".

4. Save your changes and return to the record page