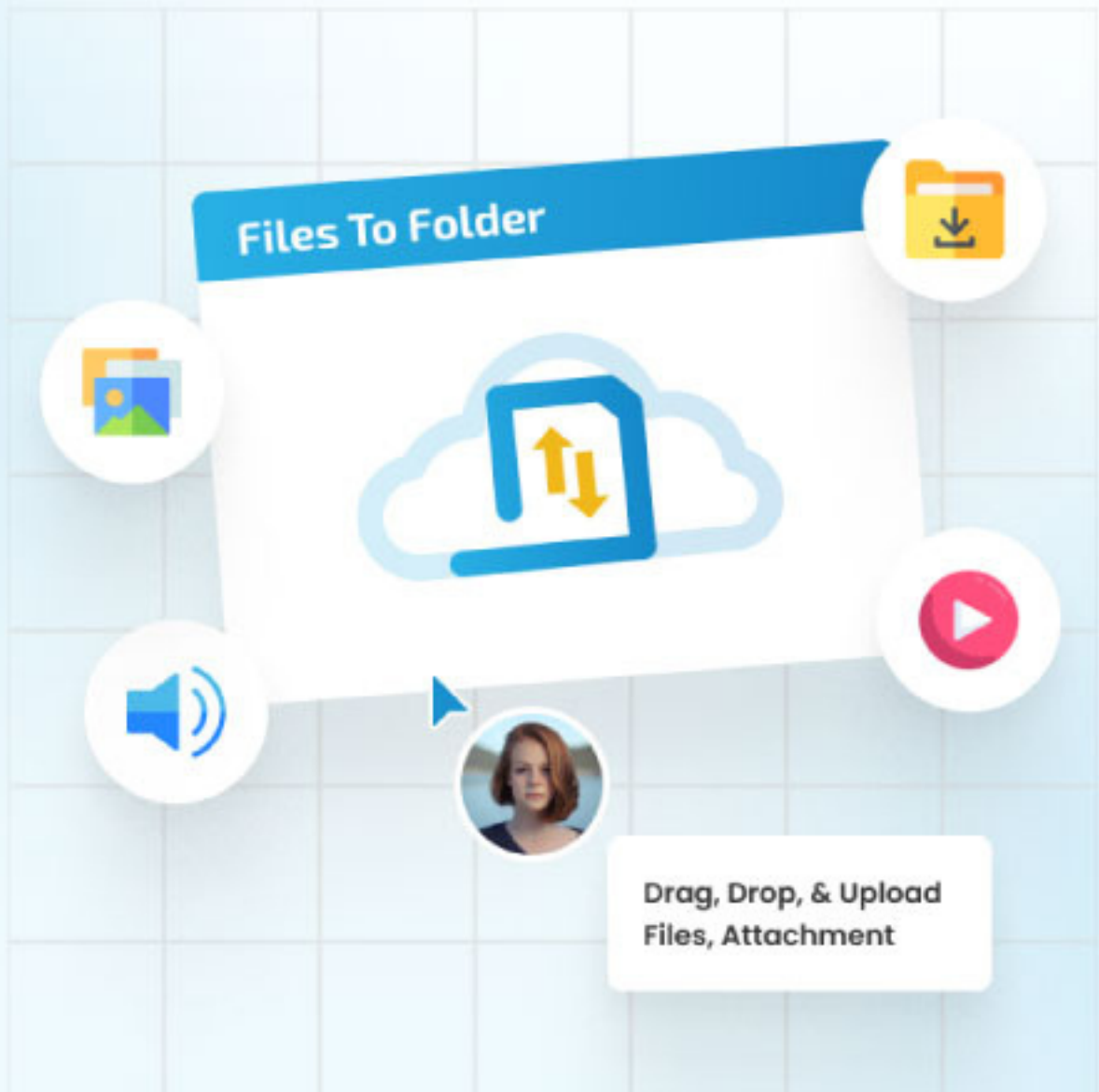




FilesToFolder



Cloud Analogy



User Manual



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Introduction

- **Overview of the Files to Folder App :**

The Files to Folder App by Cloud Analogy is designed to streamline the process of attaching files to Salesforce records. It simplifies file management by allowing users to drag and drop files directly into Salesforce, making it easy to upload and organize documents, images, and other file types associated with various Salesforce objects.

- **Purpose and Benefits of Using the App:**

The app improves productivity by:

1. Enabling drag-and-drop file uploads.
2. Supporting batch uploads.
3. Organizing files with folder structures and advanced management tools.
4. Integrating with popular storage solutions.

Installation

- **How to Install the Files to Folder App from Salesforce AppExchange:**

Begin by navigating to the Salesforce AppExchange and searching for the Files to Folder App by Cloud Analogy. Click "Get It Now" and follow the prompts to install the app in your Salesforce org. You'll need to choose whether to install it in a production or sandbox environment and agree to the terms and conditions.



- **Post-Installation Setup and Permissions:**

After installation, ensure that the appropriate permissions are granted to users who will be utilizing the app. This may include assigning the necessary profiles or permission sets, enabling the app for specific user roles, and configuring any custom settings that align with your organization's needs.

Getting Started

- **Navigating the Files to Folder Interface:**

Once installed, the Files to Folder interface will be available on supported Salesforce objects. Users will see a designated area on the record page where they can drag files. The interface is intuitive, with clear visual cues that indicate where files can be dropped for uploading.

- **Supported Salesforce Objects and File Types:**

The app supports all standard and custom Salesforce objects, meaning you can attach files to records like Accounts, Contacts, Opportunities, and more. It accepts a wide range of file types, including PDFs, Word documents, Excel spreadsheets, images, and videos, ensuring versatility in document management.



Using the Files to Folder Features

1. Viewing and Managing Files

- **Show Files and Folders:** Displays files from the selected connection.
- **Folder Structure:** Visible at the bottom, showing file organization.

The screenshot displays the FilesToFolder application interface. At the top, there is a navigation bar with a search bar and various icons. Below this, a sidebar shows a list of accounts, with 'Salesforce (This Org)' selected. The main area shows a detailed view of the selected account, including fields for Type, Phone, Website, Account Owner, and Account Site. Below this, a table lists the files and folders associated with the account. The table has columns for Name, Kind, Size, Date Created, and Modified Date. The files listed are 'Call', 'Book Appointment', 'Sales Template', 'Tesrwe', '500kb.png', and '633kb.png'. The 'Tesrwe' folder is highlighted.

Name	Kind	Size	Date Created	Modified Date
Call	Folder	-	Jan 08, 2025	Jan 08, 2025
Book Appointment	Folder	-	Jan 08, 2025	Jan 08, 2025
Sales Template	Folder	-	Jan 08, 2025	Jan 08, 2025
Tesrwe	Folder	-	Jan 07, 2025	Jan 07, 2025
500kb.png	Png	512.6 kB	Nov 20, 2024	Nov 20, 2024
633kb.png	Png	613.35 kB	Nov 20, 2024	Nov 20, 2024

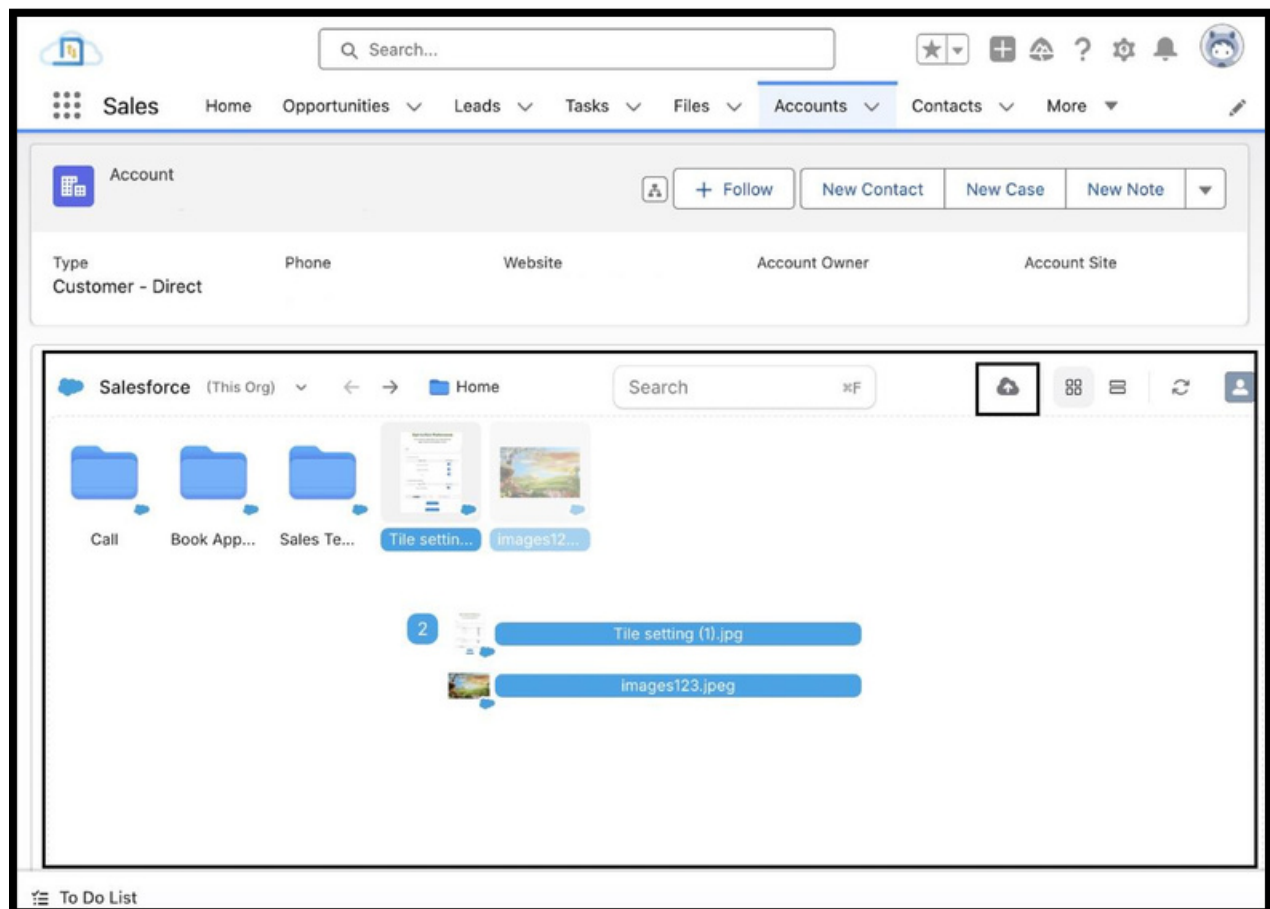


FilesToFolder



2. Uploading Files

- Drag and drop files into the designated area.
- Use the Upload File(s) button for manual uploads.
- Upload Multiple files simultaneously.





3. File Management Options

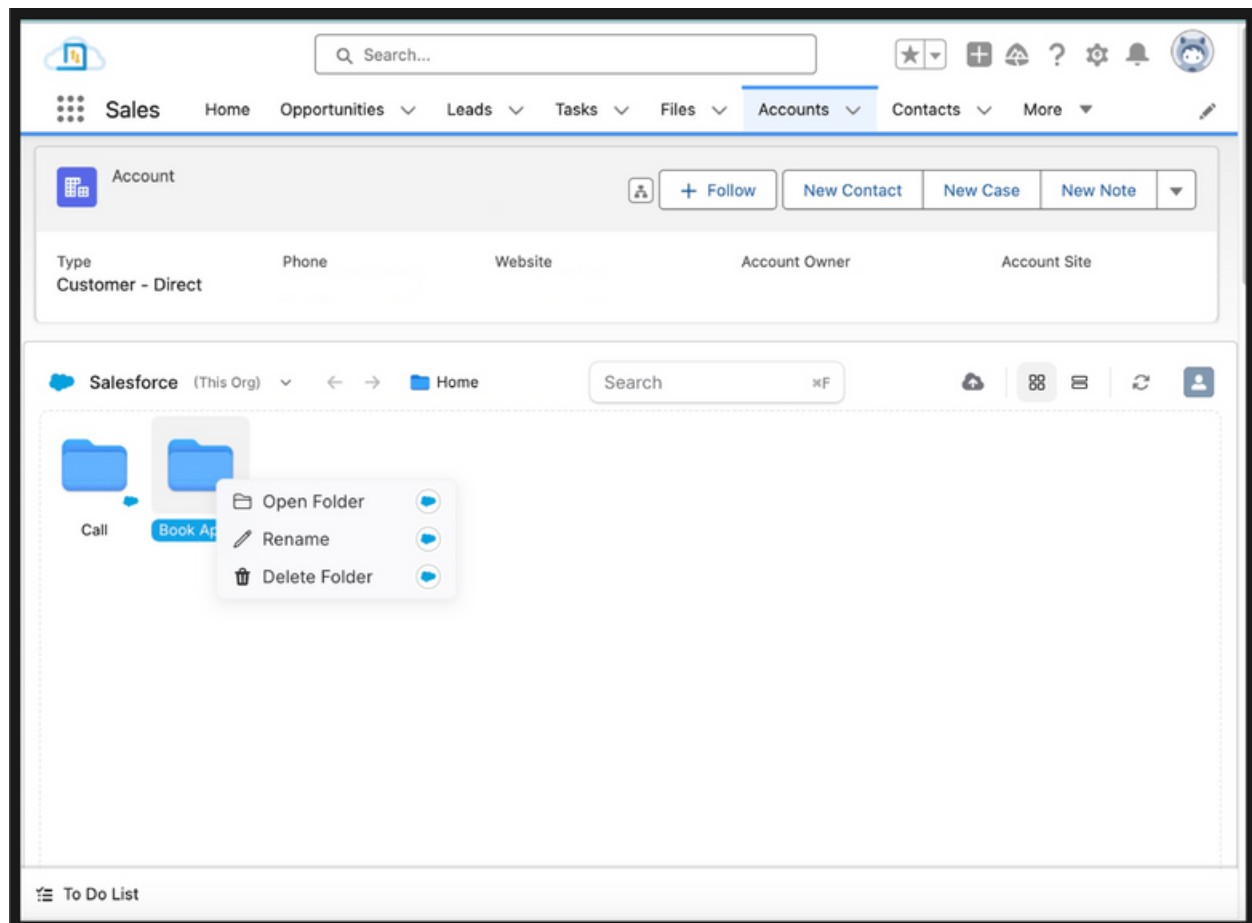
- **File Thumbnail:** View file previews if supported by CRM.
- **Refresh Files:** Refresh the file list to ensure updates.
- **Create New Folders:** Right-click and select New Folder.

The screenshot displays the FilesToFolder interface within a Salesforce environment. The top navigation bar includes the Salesforce logo, the text "Salesforce (This Org)", navigation arrows, a "Home" button, a search bar, and several utility icons. Below the navigation bar is a table listing files and folders. The table has five columns: Name, Kind, Size, Date Created, and Modified Date. The files listed are "Call", "Book Appointment", "Sales Template", "Test", "500kb.png", and "WhatsApp Image 2024-11-21 at 12.55.31(2).jpeg". A right-click context menu is open over the "Test" folder, showing options: "Refresh", "New", and "New Folder".

Name	Kind	Size	Date Created	Modified Date
Call	Folder	-	Jan 08, 2025	Jan 08, 2025
Book Appointment	Folder	-	Jan 08, 2025	Jan 08, 2025
Sales Template	Folder	-	Jan 08, 2025	Jan 08, 2025
Test	Folder	-	Jan 08, 2025	Jan 08, 2025
500kb.png	Png	-	-	-
WhatsApp Image 2024-11-21 at 12.55.31(2).jpeg	Jpeg	122.65 kB	Nov 21, 2024	Nov 21, 2024

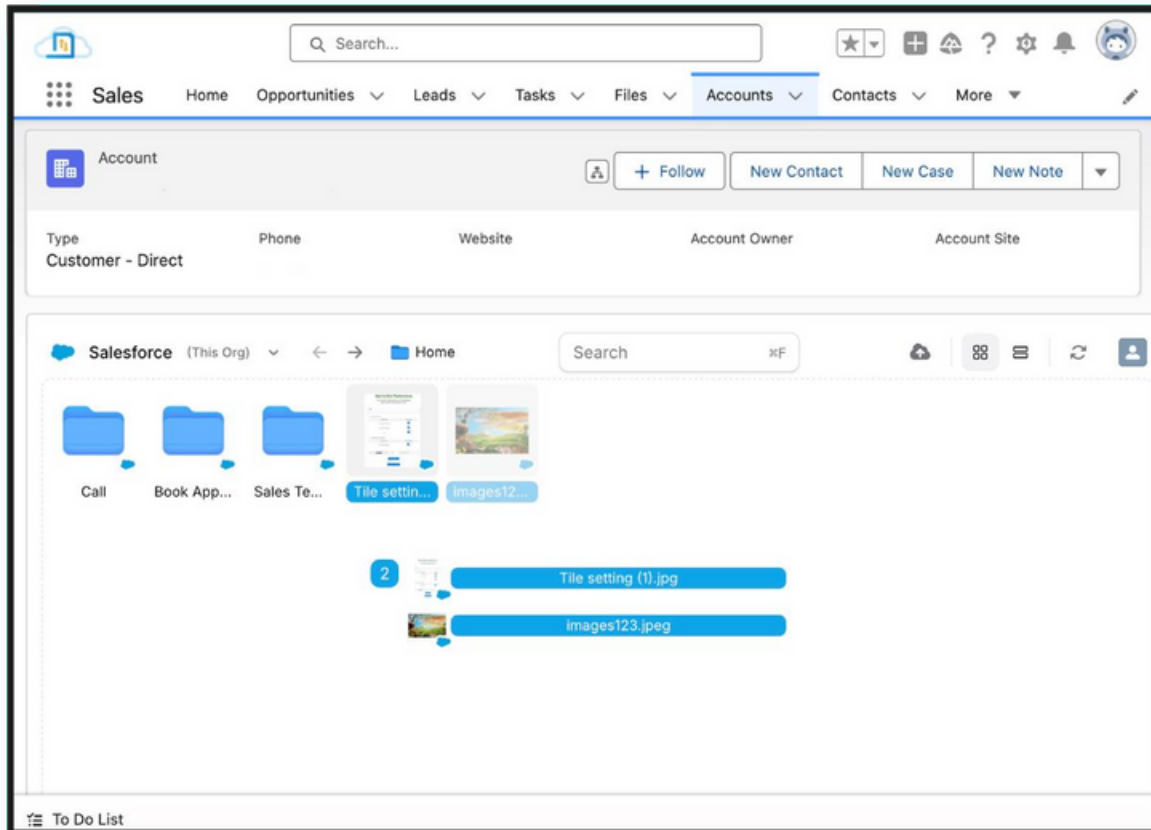
4. Advanced Features

- **Delete Files/Folders:** Right-click to delete single or multiple items.
- **Rename Files/Folders:** Right-click and select Rename.





- **Drag and Drop:** Move files between folders seamlessly.
- **Multi-Selection:** Select multiple files or folders for bulk actions.





- **Open in New Tab:** Double-click files to open them in a new tab.
- **Navigation:** Use buttons to go forward or backward.

The screenshot displays the FilesToFolder interface. At the top, there's a navigation bar with a search bar and various icons. Below it, a sidebar shows a list of folders and files. The main content area displays the details of a selected folder, 'Tesrwe', which is highlighted in blue. The details include the folder's name, kind (Folder), size (-), date created (Jan 07, 2025), and modified date (Jan 07, 2025). Below the folder details, there's a table listing files within the folder:

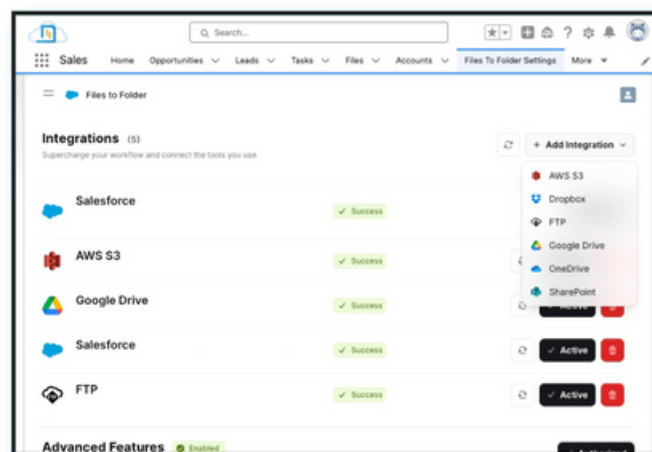
Name	Kind	Size	Date Created	Modified Date
Call	Folder	-	Jan 08, 2025	Jan 08, 2025
Book Appointment	Folder	-	Jan 08, 2025	Jan 08, 2025
Sales Template	Folder	-	Jan 08, 2025	Jan 08, 2025
Tesrwe	Folder	-	Jan 07, 2025	Jan 07, 2025
500kb.png	Png	512.6 kB	Nov 20, 2024	Nov 20, 2024
633kb.png	Png	613.35 kB	Nov 20, 2024	Nov 20, 2024

At the bottom left, there's a 'To Do List' button.

Integration

The **Files To Folder** app is designed to simplify your file management by offering seamless integration with a wide range of storage platforms. Whether you need to organize, access, or share files, our app connects effortlessly to the following storage solutions:

- **Google Drive:** Secure and manage your files with Google's reliable cloud storage.
- **Dropbox:** Access your files on the go with Dropbox's user-friendly interface.
- **OneDrive:** Leverage Microsoft's cloud solution for personal or professional use.
- **AWS:** Store and retrieve files using Amazon Web Services for scalable solutions.
- **Google Cloud:** Utilize Google's enterprise-grade storage infrastructure.
- **Azure:** Integrate with Microsoft's cloud platform for enhanced collaboration.
- **Box:** Empower your business with secure and compliant file sharing.
- **Firebase:** Seamlessly store app data with Firebase's cloud capabilities.
- **FTP:** Enjoy traditional file transfer protocol for custom storage needs.
- **SharePoint:** Collaborate with your team using Microsoft's SharePoint platform.
- **Team Google Drive:** Centralize your team's files for better organization and access.
- **Team SharePoint:** Streamline collaboration across your organization using SharePoint's team capabilities.





Troubleshooting

- **Common Issues and How to Resolve Them :**

Common issues may include problems with file upload limits, unsupported file types, or permissions errors. The guide provides solutions to these issues, such as adjusting file size settings, verifying supported formats, and ensuring correct user permissions.

- **Contact Support for Further Assistance:**

If issues persist, Cloud Analogy offers support to help resolve any technical challenges. Contact information, including email and phone numbers, is typically provided in the app's documentation or on the AppExchange listing.

Thank You

Thank you for choosing the Files To Folder App by Cloud Analogy. We sincerely appreciate your trust in us and are committed to providing you with the best possible experience.

We hope this user guide has been helpful in navigating through the features and functionalities of our system. Our goal is to make your real estate processes more efficient and effective, and we are always here to support you in achieving your objectives.

If you have any questions, need further assistance, or have feedback on how we can improve, please do not hesitate to contact our support team at [support email or phone number]. Your feedback is invaluable to us and helps us continually enhance our service.

Thank you once again for your trust and support.