

Features added - DocFynd

About

This document explains about newly added features

Document List Component

- Change Document Category Button
- Group View and List View
- Edit Icon Button
- Release Complete Process Button
- Define hashtag in document process
- Retro Tagging
- Customize layouts for documents
- Dynamic Hashtags

Change Document Category Button

The change document category button in the document list component helps us to change the category of the document by selecting multiple documents or a single document.

Steps

1. Select an **Opportunity** record. You can select any object but ensure that the object has a “*documentList*” component on the lightning record page.
2. On the top right corner, you will find the “Change Document Category” button.

Documents

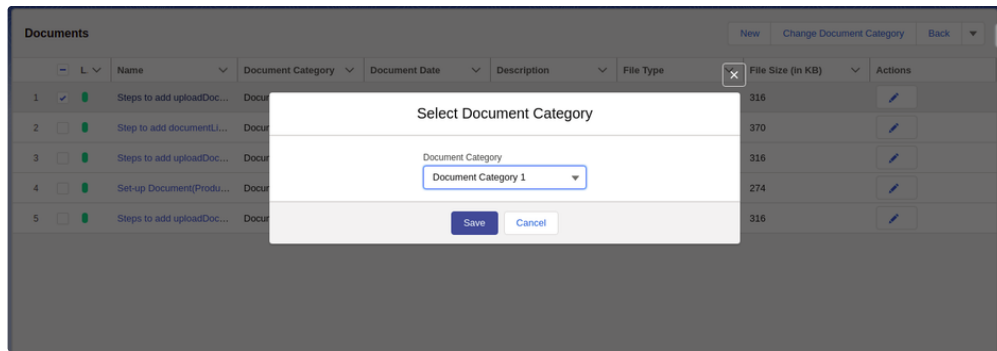
New

Change Document Category

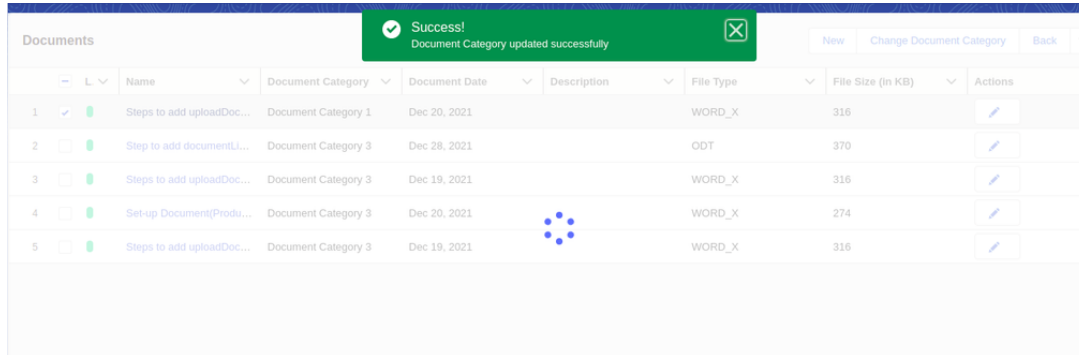
Back

	☐	L	Name	Document Category	Document Date	Description	File Type	File Size (in KB)	Actions
1	☐	☒	Steps to add uploadDoc...	Document Category 3	Dec 20, 2021		WORD_X	316	
2	☐	☒	Step to add documentLi...	Document Category 3	Dec 28, 2021		ODT	370	
3	☐	☒	Steps to add uploadDoc...	Document Category 3	Dec 19, 2021		WORD_X	316	
4	☐	☒	Set-up Document(Produ...	Document Category 3	Dec 20, 2021		WORD_X	274	
5	☐	☒	Steps to add uploadDoc...	Document Category 3	Dec 19, 2021		WORD_X	316	

3. Select multiple records or a single record by selecting the check-box and clicking on the “Change Document Category” button.



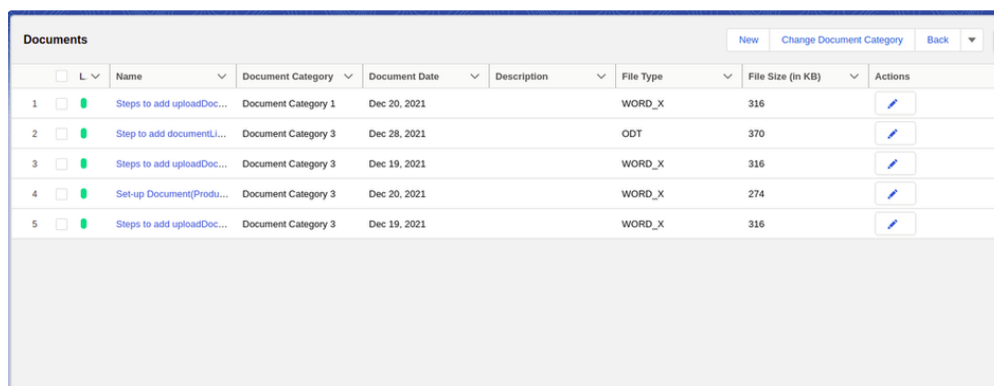
4. Select any document category displayed in the dropdown and click on “Save”.



Group View and List View

Steps

1. Group view and list view can be found by clicking a menu button next to the “Change Document Category” button.
2. By selecting “List View”, you will see an ordinary list containing documents.



3. By selecting “Group View”, the document list will be grouped based on document categories.

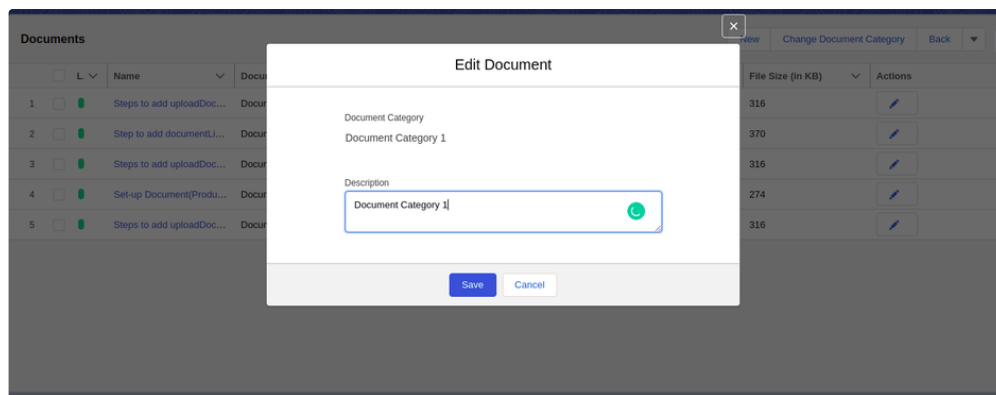
Documents							New	Back	
Document Category	Name	Document Date	Description	File Type	File Size (in KB)	Actions			
Document Category 1									
	Steps to add uplo...	Steps to add uploadDocum...	Dec 20, 2021	WORD_X	316				
Document Category 3									
	Step to add docu...	Step to add documentList ...	Dec 28, 2021	ODT	370				
	Steps to add uplo...	Steps to add uploadDocum...	Dec 19, 2021	WORD_X	316				
	Set-up Document...	Set-up Document(Product...	Dec 20, 2021	WORD_X	274				
	Steps to add uplo...	Steps to add uploadDocum...	Dec 19, 2021	WORD_X	316				

Edit Icon Button

Now you can edit your document description by clicking on the edit icon present on each document list.

Steps

1. Edit Button icon can be found on the document list in the Action column.
2. Click on the "Edit Icon" button.



3. Now edit or add document description and click on "Save".

Release Complete Process Button

Now you can release the documents to edit and upload even after the process is completed.

Steps

1. Edit button icon can be found after the complete process is clicked.

Upload Documents [Add Document](#)

Document Category 2

Label: [Green] [Blue] [Red] Total Uploaded Docs: 2 [Edit](#)

Document Category 1

Label: [Green] [Blue] [Red] Total Uploaded Docs: 2 [Edit](#)

Stage History (1)

Stage: Prospecting
 Amount: \$0.00
 Probability (%): 10%
 Expected Rev...
 Close Date: 4/1/2022
 Last Modified ... User User
 Last Modified: 4/24/2022, 11:50 PM

2. Now click on the edit button to unlock the documents to edit and upload.

Release Document

"Document Category 2" is locked. Do you want to edit and upload documents again?
 Note: Only system admins can release documents.

[Yes](#) [No](#)

3. By clicking on "Yes" your documents will be released for edit and upload.

Upload Documents [Add Document](#) [Complete Process](#)

Document Category 2

Label: [Green] [Blue] [Red] Total Uploaded Docs: 2

Document Category 1

Label: [Green] [Blue] [Red] Total Uploaded Docs: 2

Stage History (1)

Stage: Prospecting
 Amount: \$0.00
 Probability (%): 10%
 Expected Rev...
 Close Date: 4/1/2022
 Last Modified ... User User
 Last Modified: 4/24/2022, 11:50 PM

Note: Documents can be only released by system admins.

Define Hashtag in Document Process

Now you can define hashtags when adding "Documents to upload".

Steps

1. After adding document categories to “Documents to upload”, click on the hashtag icon on the action column.

Process 1 : Details

Process Name	Process 1	Is Active	☐
Object	Opportunity	Description	
Created By ID	User User	Last Modified By ID	User User
Created Date	4/25/2022, 10:55 PM	Last Modified Date	4/25/2022, 10:55 PM

Opportunity : Criteria To Check

No Criteria found.

Add

Document : Documents to upload

Add

Document Category	Folder To Save	Required?	File Types Allowed	HashTag	Actions
Document Category 1	Asset Library	☐			#

Opportunity : Field Update

No Criteria found.

Add

2. Now search for the hashtag and click on add to add a hashtag for that process document.

Document Categories Document Process Tag Process Hashtags * Test Opp 7 X

Process Name Process 1 Is Active ☐

Object

Created By ID

Created Date

Add/Remove Hashtag

* Hashtag

Search Hashtags... Add

#1 X

Save Cancel

Folder To Save Required? File Types Allowed HashTag

Asset Library ☐

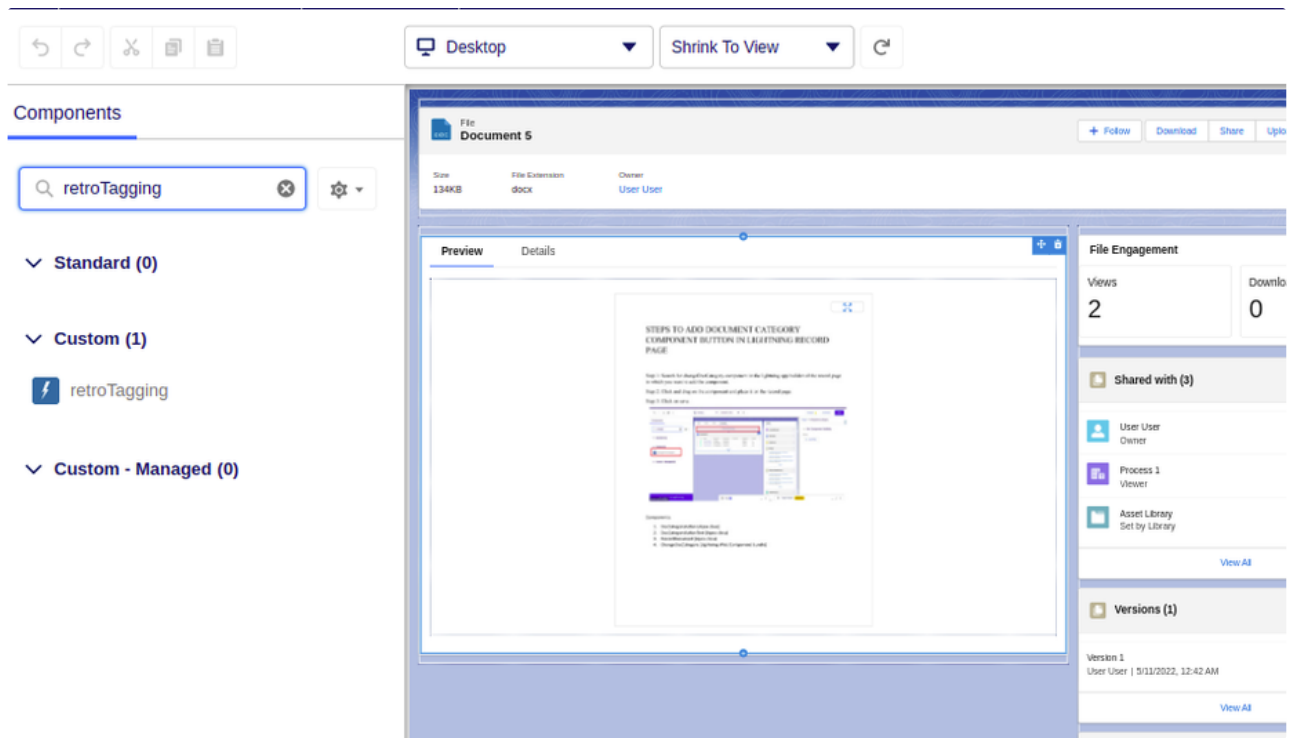
3. Click on save.

4. Now upload the documents for the process documents, the documents will be tagged automatically to the hashtags that have been configured in the process document.

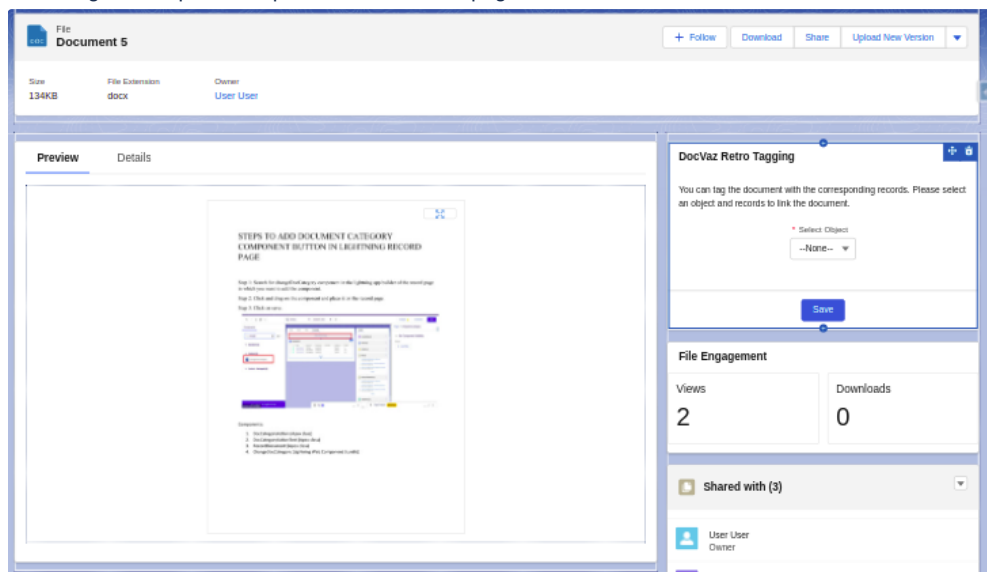
Now you can tag documents from the content document record page to any records by filtering them.

1. Go to the content document record page and click on the “*edit page*” from the setup icon next to the notification icon.

2. In the components tab search for “*retroTagging*” custom component.



3. Now drag and drop the component to the record page.



4. Click on "save".

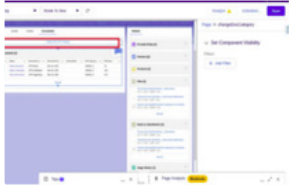
5. Now select any object from the drop-down and search for any records and click on "Add" to add the records.

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▼

**DOCUMENT CATEGORY
BUTTON IN LIGHTNING RECORD**

ccCategory component in the lightning app builder of the record page
is component.

is component and place it on the record page.



DocVaz Retro Tagging

You can tag the document with the corresponding records. Please select an object and records to link the document.

* Select Object

Account ▼

Test 2 X

Add

Test 1 X

Test 2 X

Save

File Engagement

6. Click on "save".

✔ Document successfully tagged to all the records selected in the UI

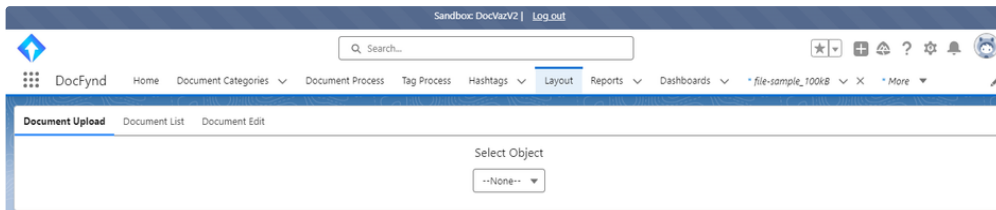
Customize Layouts for Documents

Now you can customize field layouts to show in the document upload screen and in the document list table and in the document edit screen. You can also add custom fields in the "*docfynd__document__c*" object and enter the values while uploading documents

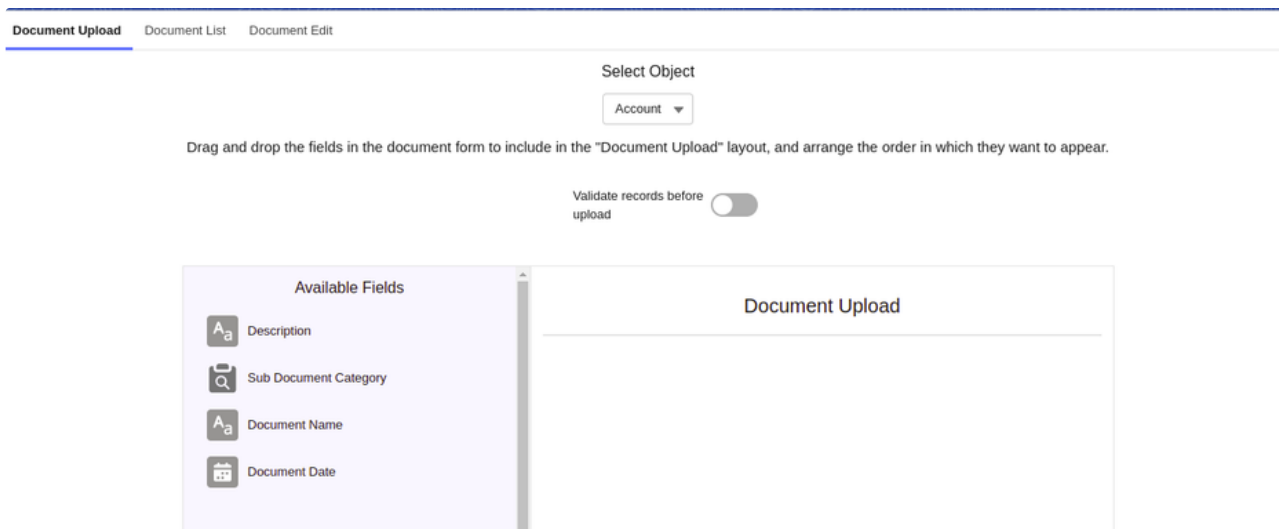
Document Upload Layout

Steps

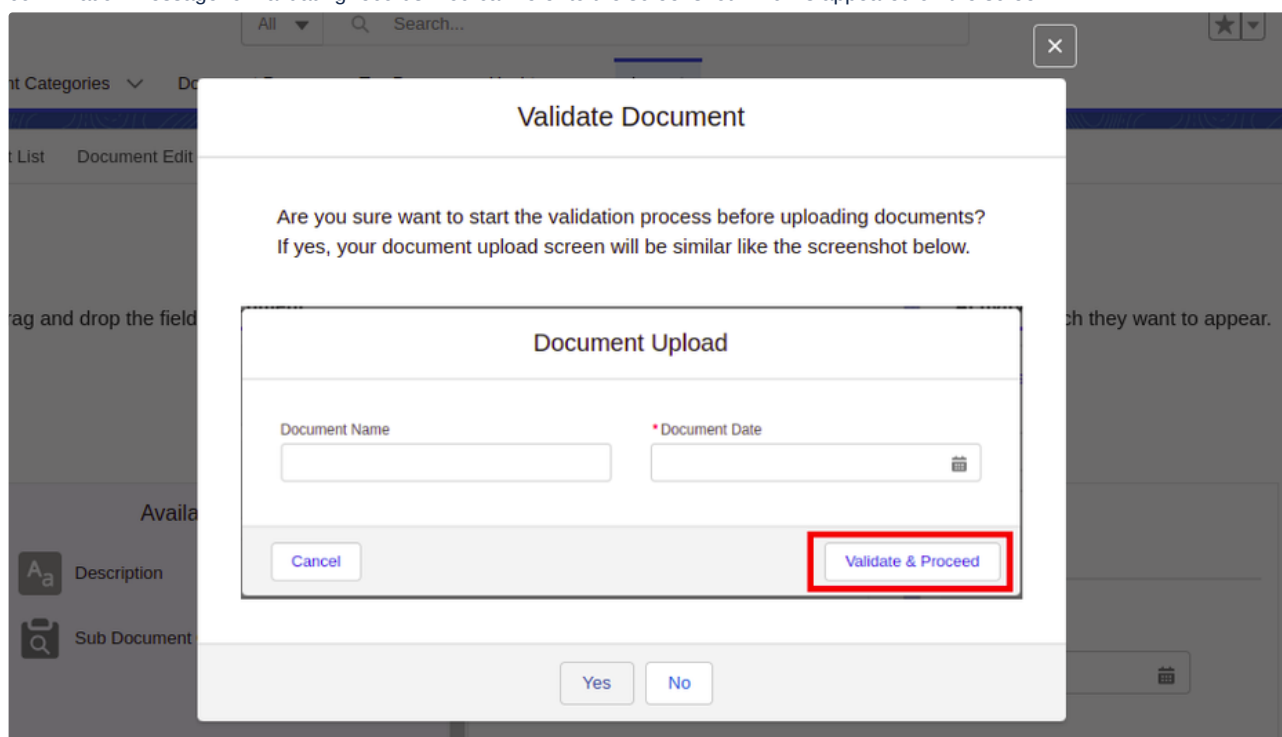
1. Create any field on the docfynd__Document__c object.
2. Click on the Layouts tab from the DocFynd app.



3. In the Document Upload tab select any object to add a layout for the specific object.



4. By selecting any object you will find the "Validate records before upload" toggle, by checking that toggle you will be asked for a confirmation message for validating records. You can refer to the screenshot which is appeared on the screen.



5. Now click on yes to validate documents before upload.
6. Next, you will see the document fields on the left column of the screen. The field which you have created will also be listed in the document fields.
7. Now add the fields to the layout by drag and drop. You can reorder or arrange the fields based on your requirements. This order will be shown the same in the document upload UI.

Account ▾

Drag and drop the fields in the document form to include in the "Document Upload" layout, and arrange the order in which they want to appear.

Validate records before upload ☒

Available Fields

 Document Date

Document Upload

Document Name

Sub Document Category

Description

8. Click on "save"
9. Now while before uploading documents, you will be asked to enter the values for the field that you have added to the layout page. After adding the values click on "*validate & Proceed*" if you have checked the toggle mentioned in the previous step. If not just click on upload to save the document along with the field values entered.

 Document Upload Layout configured successfully!

Document List Layout

Steps

1. Create any field on the docfynd__Document__c object.
2. Click on the Layouts tab from the DocFynd app.

Sandbox DocFydv2 | Log out



DocFynd Home Document Categories Document Process Tag Process Hashtags Layout Reports Dashboards *file-sample_100kB X More

Document Upload Document List Document Edit

Select Object
--None--

3. In the Document List tab select any object to add a layout for the specific object.

Document Upload **Document List** Document Edit

Select Object
Account ▾

Choose the fields to include in the "Document List" layout, and arrange the order in which they want to appear.

Document Fields ⓘ

Available Fields

Owner ID

Content Document ID

Document Info

Document Related To

File Id

File Uri

Sub Document Category

Selected Fields

Label

Storage Type

Document Name

Document Category

Document Date

Description

File Name

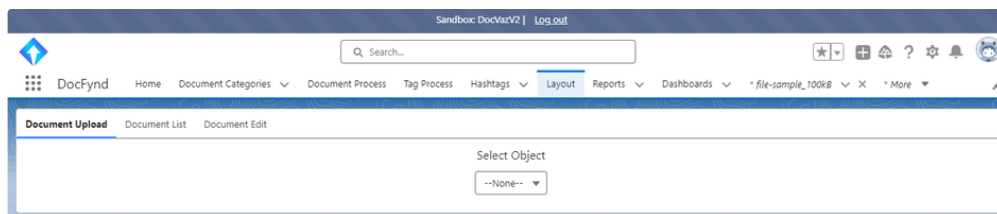
4. By selecting any object, you will see the document fields on the left column of the screen. The field which you have created will also be listed in the document fields.
5. Now add the fields to the layout by selecting fields and moving the selection to the required fields. By default, the document list contains specific fields. You can either re-order them or remove them as per your requirements. This order will be shown the same in the document list table.
6. Click on "Save".
7. Now you will find your ordered fields in the document list table.

✔ Document List Layout configured successfully!

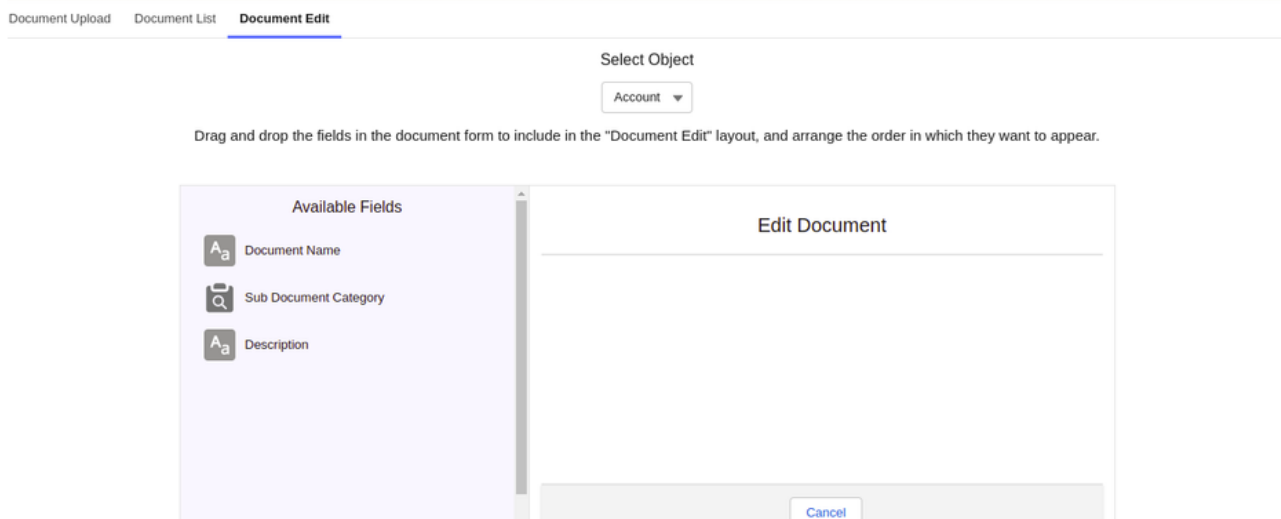
Document Edit Layout

Steps

1. Create any field on the docfynd__Document__c object.
2. Click on the Layouts tab from the DocFynd app.



3. In the Document Edit tab, select any object to add a layout for the specific object.
4. By selecting any object, you will see the document fields on the left column of the screen. The field which you have created will also be listed in the document fields.



5. Now add the fields to the layout by drag and drop. You can reorder or arrange the fields based on your requirements. This order will be shown the same in the document edit UI.

Drag and drop the fields in the document form to include in the "Document Edit" layout, and arrange the order in which they want to appear.

Available Fields

Document Name

Edit Document

Sub Document Category

Search Document Categories

Description

Cancel

Save

6. Click on "save"

7. Now while before editing the documents, you will be asked to enter the values for the field that you have added to the layout page. Enter the values in the fields and click on "save".

✓ Documents will be edited successfully.

Dynamic Hashtags

Now you can enable dynamic hashtags while creating a process document.

Steps

1. Go to any process and in the documents to upload section click on add and create a process document.
2. After creating the process document, in the Action column click on the hashtag icon.

Account : Criteria To Check

Add

Field	Operators	Value	Actions
Account Type	equalTo	Prospect	

Condition :

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

Edit Filter Condition

Document : Documents to upload

Add

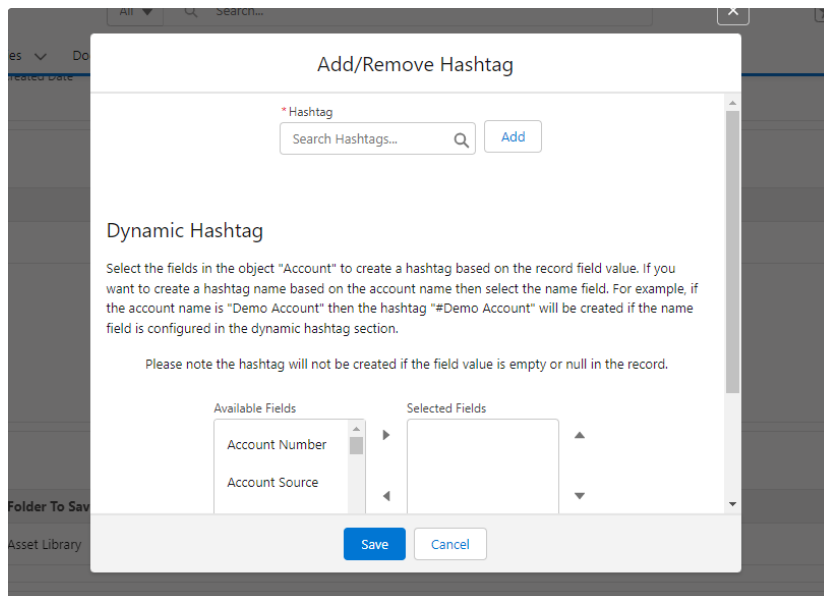
Document Category	Folder To Save	Required?	File Types Allowed	HashTag	Actions
Test Cat 1	Asset Library	☐	.pdf,.docx		

Account : Field Update

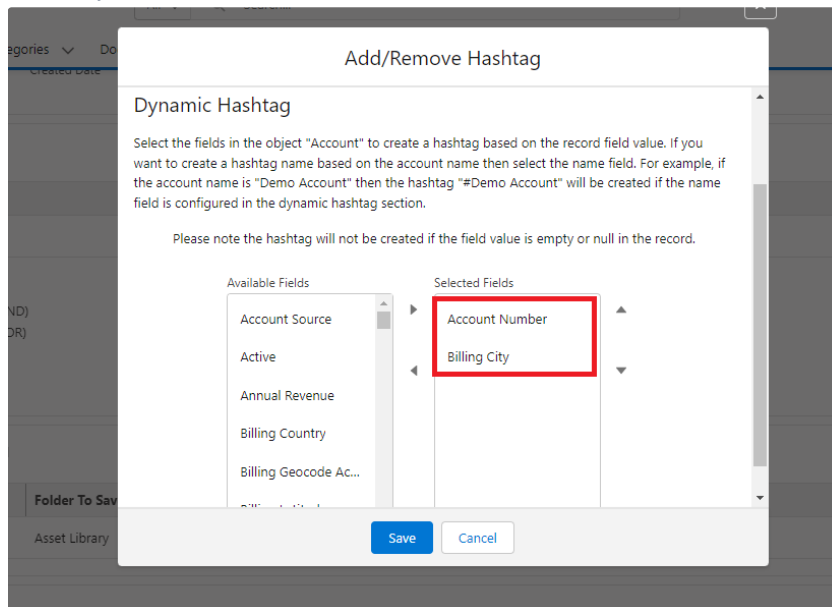
No Criteria found.

Add

3. In the dynamic hashtag section, a field list of the object will be available.



4. Select any fields and click on "Save".



5. Now go to the record page and upload documents for that process document.

6. Your documents will be created and meanwhile, the hashtag records will be created based on the field value provided.

✓ Dynamic Hashtags configured successfully