

DocFynd - Known Issues

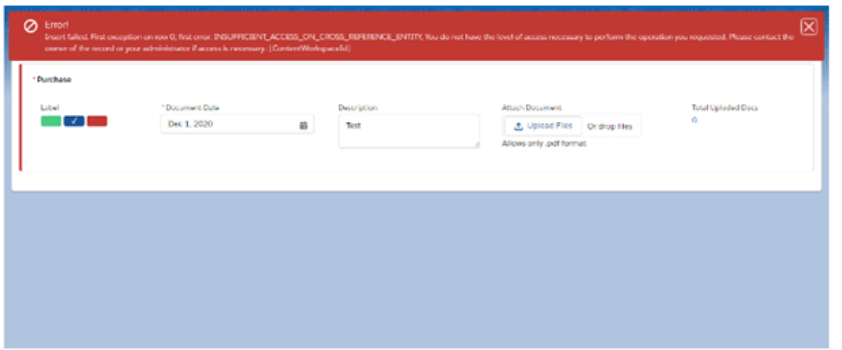
This document describes the known issues within the DocFynd application. Users of the application can refer this document to check if any of the errors that they get whilst using the DocFynd app is listed in this document.

Audience

This guide is written for Salesforce Admins and users using the DocFynd application.

Uploading Documents - Salesforce

You might face the following error when uploading the documents.

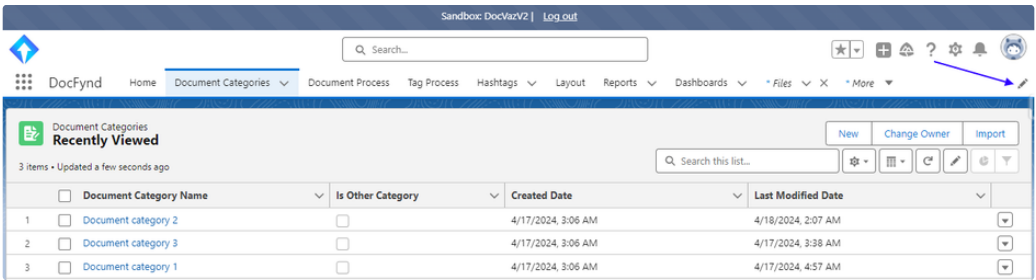


Possible cause:

Missing permissions.

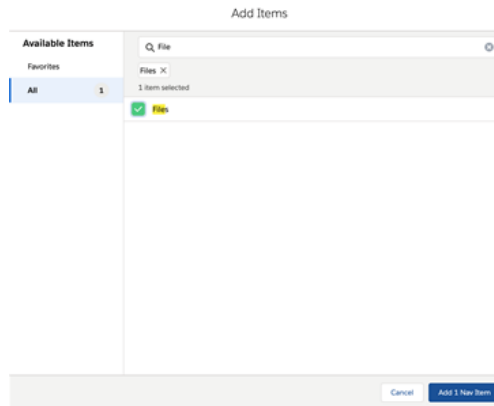
Before uploading documents, permissions need to be set to that folder that is configured in the “Documents to upload” in the Document Process.

Steps to overcome the issue:

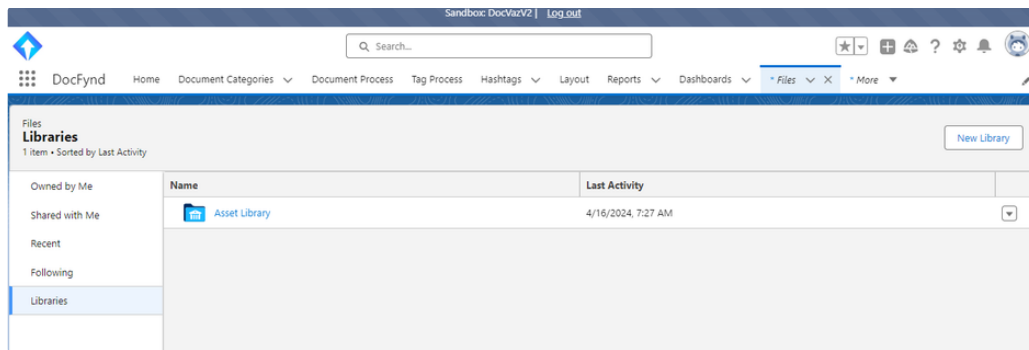


Step 1 : Add Files Tab by clicking on the edit icon on the right corner.

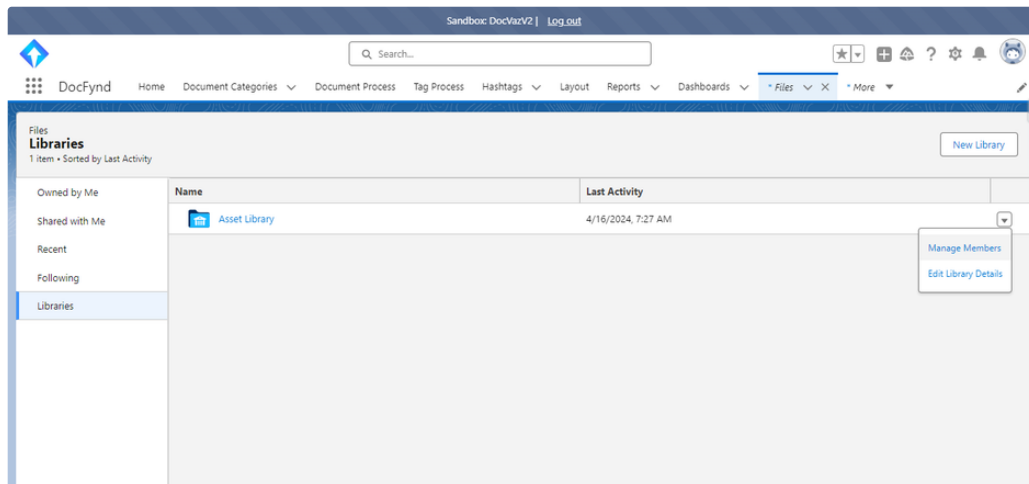
Step 2 : Search and Add files tab from the list of tabs.



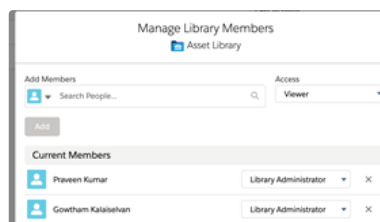
Step 3: Click on the files tab and select libraries.



Step 4 : Click down arrow on the right corner of the folder, which you want to give permission and choose Manage members from the list of options.



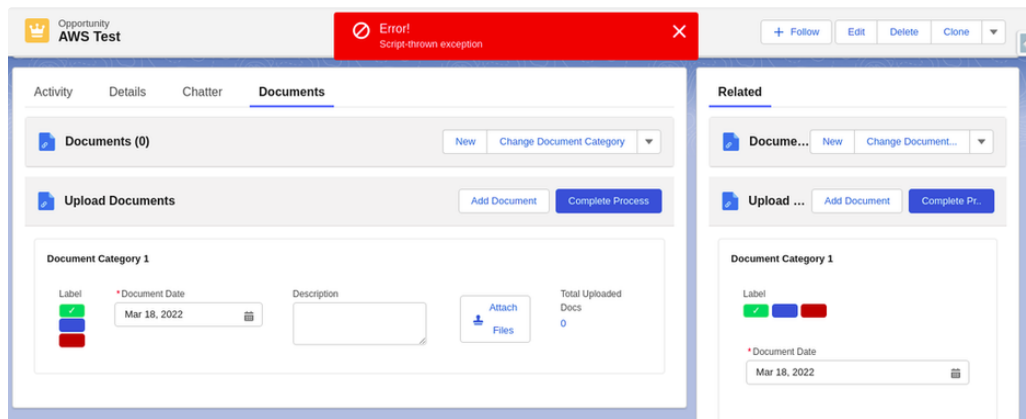
Step 5 : Select user for whom you want to give access to that folder and give Library Administrator permission to that user.



✓ After providing permissions to that user for the folder, the issue will not occur.

Uploading Documents - S3

You might face the following error when uploading the documents to S3.



Possible cause:

Missing picklist value in StorageType__c in Document Info object.

Steps to overcome the issue:

Step 1: Select object manager from the setup screen.

Step 2: In the object manager search for the Document Info object.

Step 3: In the Document Info object select Fields & Relationships from the tab.

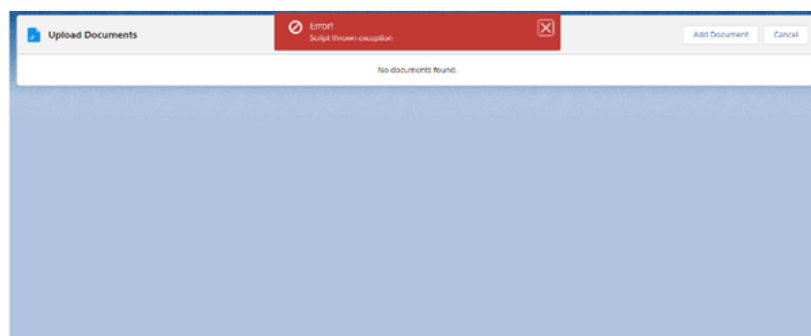
Step 4: In the Fields & Relationships search for the Storage Type picklist field and click on it.

Step 5: In the Values section click on the New button and enter 'AWS' as value and click on save.

✓ After adding the value in the picklist field, the error will not occur.

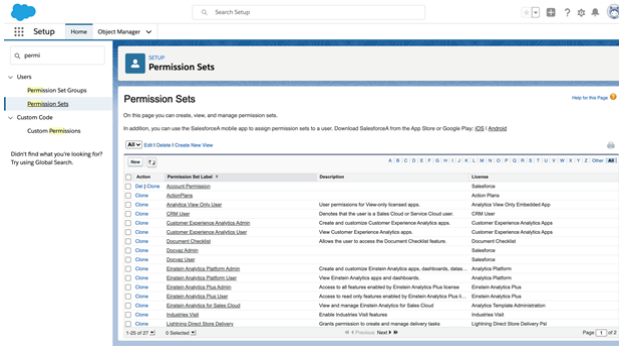
Script thrown exception if there is no access for the object

Object-level and field-level access must be given for the object, which documents need to be uploaded.

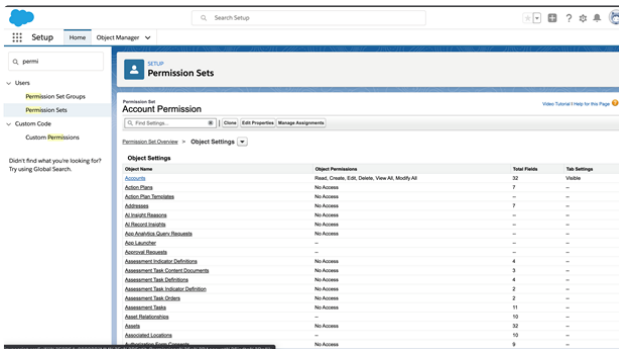
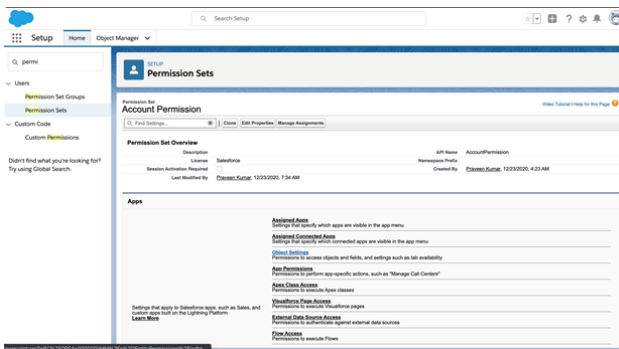


Steps to overcome the issue:

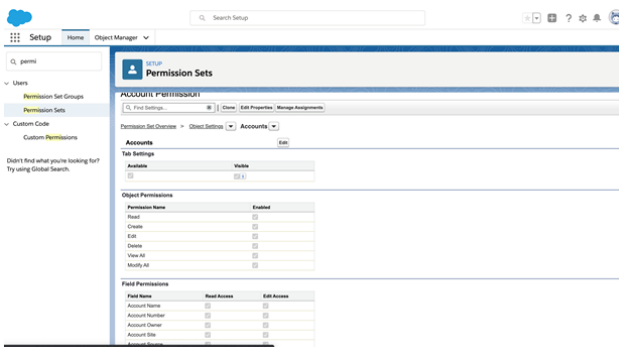
Step 1 : Add new permission set by selecting permission set from the setup menu.



Step 2 : Click object settings from the permission set.

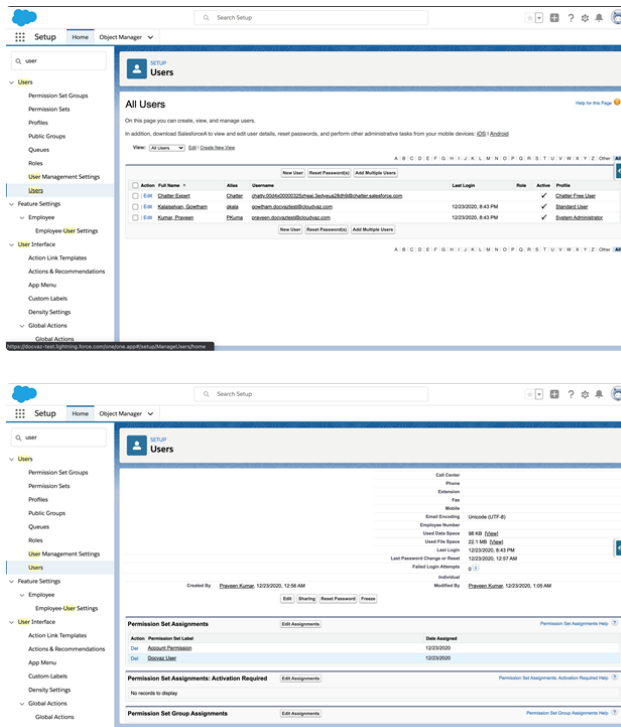


Step 3 : Choose the required object, which you want to give permission.



Step 4: Click edit and give the necessary access to the required fields

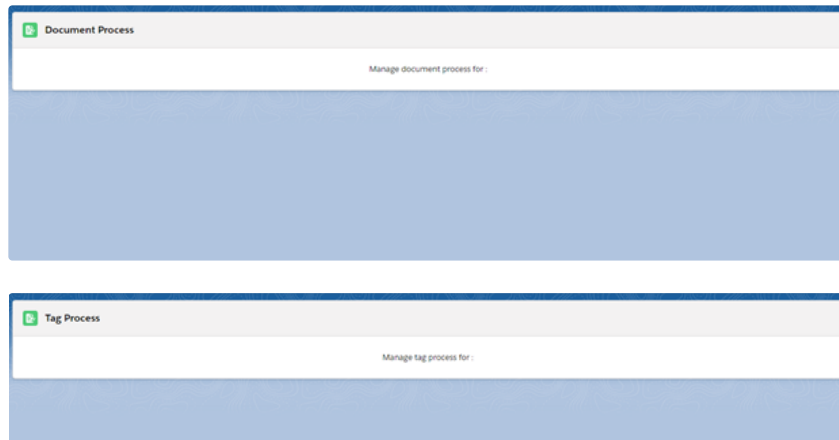
Step 5: Select users from setup menu and click on the user, whom you want to give access to.



Step 6: Assign the permission set which is created before to the user.

✓ After following the above steps, script thrown exception will not be shown.

Users with DocFynd User permission set are not able to see the document and tag process list



Solution : Users with DocFynd Admin permission set can create document process and tag process, while Users with DocFynd User permission set can only upload documents.

Hashtag – Document Category

Problem: Select "Hashtags" tab and click "New" under the "Documents" tab. The "Document Category" search box will not appear. This happens intermittently.

Document Upload

Label

✓

* Document Date

Dec 24, 2020

Description

Document Category

Attach Document

Upload Files

Or drop files

Solution: Switch to a different tab or refresh the screen few times and clear the browser cache. The search box will appear.