

DocFynd - Solution Guide

Introduction

DocFynd is a simple click-and-configure application to link your documents to multiple Salesforce objects. The configuration rules ensure that all processes follow the same rules when a document is uploaded to any of the Salesforce objects.

All businesses have a multitude of documents – both physical and digital. Organizations that use Salesforce to manage their business activities have many challenges in accessing the documents within Salesforce.

When a document is attached to an object in Salesforce, it is linked only to that object. This is one of the standard features of Salesforce. But the documents need to be available for other objects as well. There is no provision of an automated process to link the documents to other objects as required. This limitation will become multi-fold for businesses that have massive number of documents under different categories.

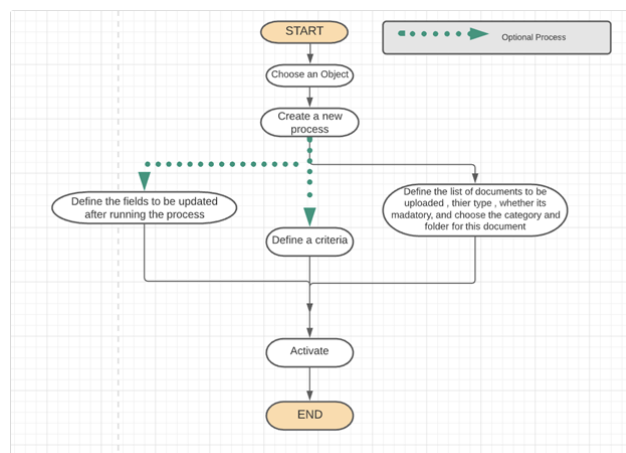
DocFynd is an intuitive and elegant solution to overcome these challenges and can scale up with the growth of the business. DocFynd works out of a robust solution base and addresses a wide variety of real-time business cases for accessing documents in Salesforce.

Below are the key components

Component	Description
Document Process	Allows the admin to configure a process(via point and click) to Define the set of documents that needs to be uploaded and associated with a record at various stages of the record. E.g. An Opportunity record in salesforce moves through various stages like “Prospecting”, “Qualification” to “Closed Won”, DocFynd allows the admin to configure the list of the documents that can be uploaded at various stages.
Tag Process	Allows the admin to configure that when a Document is uploaded for a record, which other related records does this uploaded document must be linked and visible
Hashtag Process	This feature allows a list of documents to be associated with a record of an Object via hashtag (custom object)

Manage Document Process - DocFynd Admin User

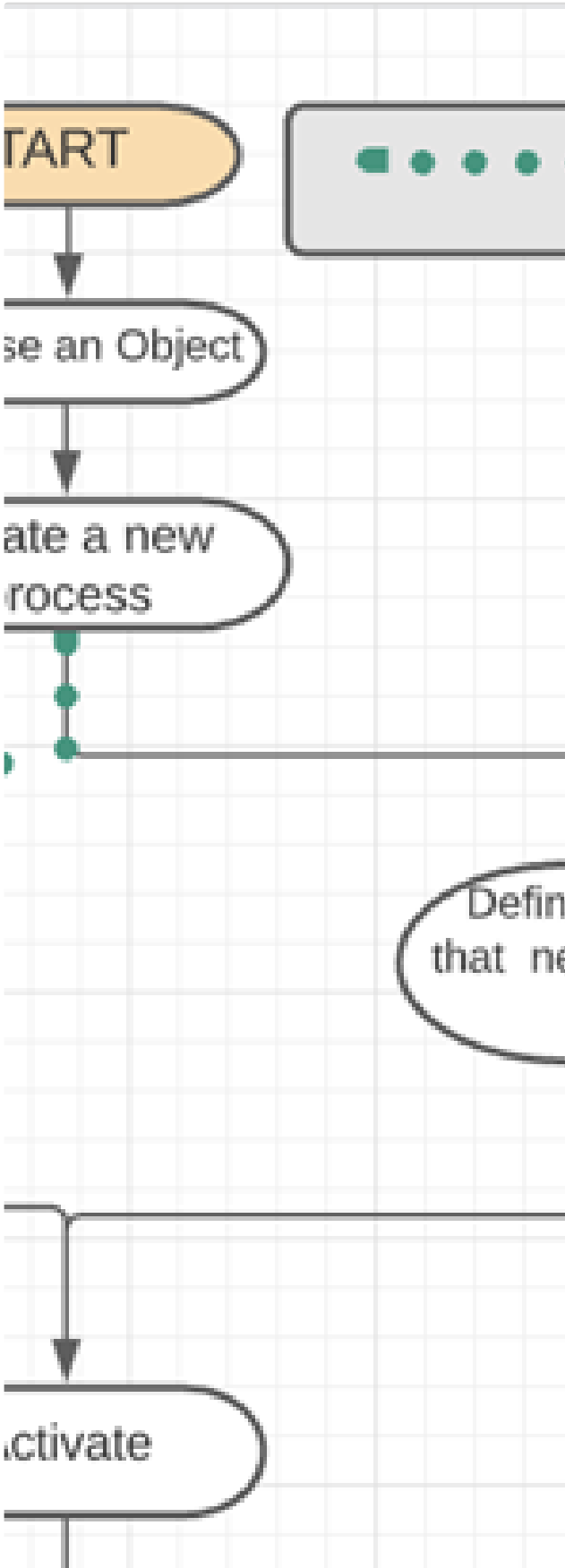
Create Document Process:

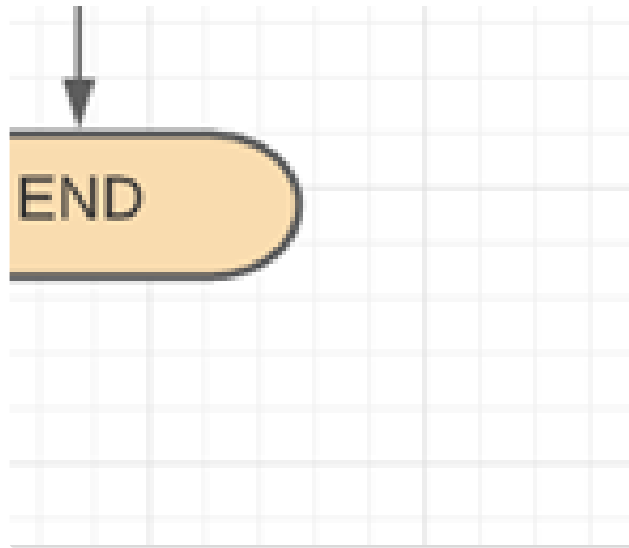


Activity	Description
Document Category	This is a custom object which is used to manage the category for the documents
Create a new document process	Allows an admin to define a new document upload process. The admin can • Define the criteria for the record for which the documents need to be uploaded. • Define the document(s), file type (PDF, DOC), document category, and the folder to save the document • Define the field updates on the record after a document upload process is completed.
Edit a document process	Allows an admin to define a edit an existing document upload process. The admin can • Define the criteria(s) for the record for which the documents need to be uploaded. • Define the document(s), file type (PDF, DOC), document category, and the folder to save the document • Define the field updates on the record after a document upload process is completed.
Activate/deactivate a document process	Allows an admin to activate/deactivate a process
Delete inactive document process	Allows to delete an inactive process
Manage Document Process sequence	if multiple processes are defined for a single object, this feature will allow the admin to manage the order of the sequence in which the available process will be executed. Note: If the criteria match, DocFynd will only execute that process and will NOT proceed to evaluate the next process

Manage Tag Process - DocFynd Admin User

Create Tag Process:





Allows the admin to configure a process that when a Document when it is uploaded for a record, to its other related records

Activity	Description
Create a new tag process	Allows an admin to define a new tag process, the admin can • Define the criteria(s) for the uploaded documents that need to be linked. • Define the parent and child objects which this document needs to be linked.
Edit a tag process	Allows an admin to define a edit an existing Tag process, the admin can • Define the criteria(s) for the uploaded documents that need to be linked. • Define the parent and child objects which this document needs to be linked.
Activate/deactivate a tag process	Allows an admin to activate / de-activate a process
Delete an inactive tag process	Allows to delete an inactive process
Manage tag process sequence	If multiple processes are defined for a single object, this feature will allow the admin to manage the order of the sequence in which the available process will be executed. Note: If the criteria match, DocFynd will only execute that process and will NOT proceed to evaluate the next process

Manage Hashtag Process - DocFynd Admin / User

This feature allows a list of documents to be associated with a record of an Object via hashtag (custom object).

- DocFynd Admin / User adds a new custom "hashTag" component to the record detail pages. Here the user can associate the hashtags to the records of the object.
- User creates a hashtag
- User uploads list of documents to the hashtag
- When the user navigates to a record detail page, the user can tag that record with multiple hashtags
- Once the hashtags are linked with a record, the user can then navigate to the list of documents which are associated with the hashtag from the record.

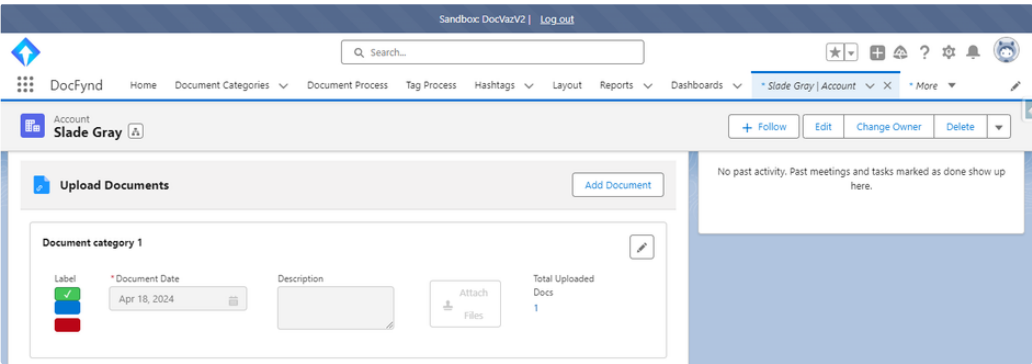
Upload Documents - DocFynd User

If a DocFynd admin has defined an upload process for an Object (e.g., Account) with the following details

- The criteria for the record for which the documents need to be uploaded. (for e.g., Industry = 'Manufacturing')
- Defined the document file type (PDF, DOC), document category, and the folder to save the document.
- Defined the field updates on the record after a document upload process is completed.

Additionally, the DocFynd admin has defined a tag process for an Account Object and have defined the related objects (e.g., Contact object) to which the document needs to be linked.

Now when a DocFynd user navigates to a record of an object and if the record matches the defined criteria, then in the Document tab, there will be an option to upload a document matching the process.



After the user has uploaded a document, since the admin has already defined a Tag process to associate the uploaded document with its related record (Contact object), the user would be able to see the uploaded document in the related record as well.

Entity Relationship Diagram



Entity Relationship Diagram

DocFynd - Data Model

List of Objects

Sl.No.	Name	API Name	Description
1	Process	docfynd__Process__c	Stores information about document or tag process
2	Criteria	docfynd__Criteria__c	Stores criteria's (Field condition) to check the record and update the field value
3	Document Category	docfynd__DocumentCategory__c	Contains document category
4	Process Document	docfynd__ProcessDocument__c	Represents the types of documents (Document category) and conditions to upload for the process
5	Document Info	docfynd__DocumentInfo__c	Stores document category and its related status for the record
6	Document	docfynd__Document__c	Stores document related information
7	Document Link	docfynd__DocumentLink__c	Contains document and related record link
8	Hashtag	docfynd__hashTag__c	Contains hashtag
9	Hashtag Link	docfynd__hashTagLink__c	Contains hashtag and related record link
10	Object To Link	docfynd__objectToLink__c	Contains objects to link

Object Name: Process

Object Name	Process
Object API Name	docfynd__Process__c

Sl. No.	Name	API Name	Data Type	Description
1	Process Name	Name	Text(80)	
2	Object	docfynd__Object__c	Picklist	Stores selected object.
3	Description	docfynd__Description__c	Text Area(255)	Stores description of the process
4	Process Type	docfynd__ProcessType__c	Picklist	This field determines whether it is tag or document process
5	Object Logical Condition	docfynd__ObjectLogicalCondition__c	Picklist	Stores condition format like "AND" or "OR" for process criteria of an object

6	Process Sequence	docfynd__ProcessSequence__c	Number(4, 0)	Stores the order of the process
7	Owner	OwnerId	Lookup(User, Group)	
8	Last Modified By	LastModifiedById	Lookup(User)	
9	Created By	CreatedById	Lookup(User)	
10	Is Active	docfynd__IsActive__c	Checkbox	This field determines whether the process is active or inactive. value true means active, false means inactive.
11	Total Process Docs	docfynd__totalProcessDocs__c	Roll-Up Summary(COUNT Process Docs)	Contains no. of process docs available in process
12	Total Obj To Link	docfynd__totalObjToLink__c	Roll-Up Summary(COUNT Object To Link)	Contains no. of objects to link available in process

Object : Criteria

Object Name	Criteria
Object API Name	docfynd__Criteria__c

Sl. No.	Name	API Name	Data Type	Description
1	Value	docfynd__Value__c	Text(255)	Stores object field value
2	Type	docfynd__Type__c	Text(255)	Stores object field type
3	Object	docfynd__Object__c	Text(255)	Stores object API name
4	Label	docfynd__Label__c	Text(255)	Stores object field label
5	Field	docfynd__Field__c	Text(255)	Stores object field API name
6	Operator	docfynd__Operator__c	Picklist	Stores operator type to check the field value
7	Criteria Type	docfynd__CriteriaType__c	Picklist	This field determines whether it is criteria to check or update.
8	Order	docfynd__Order__c	Number(18, 0)	Stores order of the criteria
9	Owner	OwnerId	Lookup(User, Group)	
10	Last Modified By	LastModifiedById	Lookup(User)	
11	Created By	CreatedById	Lookup(User)	

12	Process	docfynd__Process__c	Lookup(Process)	Stores the process record ID (Lookup field)
13	Criteria ID	Name	Auto Number	

Object : Document Category

Object Name	Document Category
Object API Name	docfynd__DocumentCategory__c

Sl.No.	Name	API Name	Data Type	Description
1	Document Category Name	Name	Text(80)	
2	Is Other Category	docfynd__IsOtherCategory__c	Checkbox	Checkbox to represent if document category is other category
3	Total Process Documents	docfynd__TotalProcessDocs__c	Roll-Up Summary(COUNT Process Document)	Contains no. of documents available in process
4	Total Documents	docfynd__TotalDocs__c	Roll-Up Summary(COUNT Document Info)	Contains no. of documents available in records
5	Owner	OwnerId	Lookup(User, Group)	
6	Last Modified By	LastModifiedById	Lookup(User)	
7	Created By	CreatedById	Lookup(User)	

Object : Process Document

Object Name	Process Document
Object API Name	docfynd__ProcessDocument__c

Sl. No.	Name	API Name	Data Type	Description
1	Folder Name	docfynd__FolderName__c	Text(255)	Stores the folder name to save the file
2	Folder ID	docfynd__Folder__c	Text(255)	Stores the folder ID to save the file
3	File Types Allowed	docfynd__FileTypesAllowed__c	Picklist (Multi-Select)	Stores the types of file format allowed to upload

4	Process	docfynd__Process__c	Master-Detail(Process)	Stores document Process ID
5	Document Category	docfynd__DocumentCategory__c	Master-Detail(Document Category)	Stores document category ID
6	Last Modified By	LastModifiedById	Lookup(User)	
7	Created By	CreatedById	Lookup(User)	
8	Is Required	docfynd__IsRequired__c	Checkbox	Contains the information whether the file is required for the document category.
9	Process Document ID	Name	Auto Number	

Object : Document Info

Object Name	Document Info
Object API Name	docfynd__DocumentInfo__c

Sl. No.	Name	API Name	Data Type	Description
1	Owner	OwnerId	Lookup(User,Group)	
2	Last Modified By	LastModifiedById	Lookup(User)	
3	Created By	CreatedById	Lookup(User)	
4	Document Category	docfynd__DocumentCategory__c	Master-Detail(Document Category)	Stores document category id
5	Document Info ID	Name	Auto Number	
6	Related To	docfynd__RelatedTo__c	Text(18)	Stores record Id
7	Document Status	docfynd__DocumentStatus__c	Picklist	Stores document category status for the record
8	Process	docfynd__Process__c	Lookup(Process)	Contains Process ID
9	Process Document	docfynd__ProcessDocument__c	Lookup(Process Document)	Contains Process Document ID

Object : Document

Object Name	Document
--------------------	----------

Object API Name	docfynd__Document__c
------------------------	----------------------

Sl. No.	Name	API Name	Data Type	Description
1	Document Name	Name	Text(80)	
2	Label	docfynd__Label__c	Picklist	Stores label (represents the priority of the document)
3	File Type	docfynd__FileType__c	Text(255)	Stores files type
4	File Size	docfynd__FileSize__c	Text(255)	Stores file size
5	Document Related To	docfynd__DocumentRelatedTo__c	Text(18)	Stores related record ID
6	Content Document ID	docfynd__ContentDocument__c	Text(18)	Stores content document ID
7	Description	docfynd__Description__c	Text Area(255)	Stores description of the document
8	Document Category	docfynd__DocumentCategory__c	Formula (Text)	Contains document category
9	Owner	OwnerId	Lookup(User, Group)	
10	Last Modified By	LastModifiedById	Lookup(User)	
11	Created By	CreatedById	Lookup(User)	
12	Document Info	docfynd__DocumentInfo__c	Lookup(Document Info)	Stores document info ID
13	Document Date	docfynd__DocumentDate__c	Date	Stores the document date

Object : Document Link

Object Name	Document Link
Object API Name	docfynd__DocumentLink__c

Sl. No.	Name	API Name	Data Type	Description
1	Document Related To	docfynd__DocumentRelatedTo__c	Text(18)	Stores related record ID
2	Content Document ID	docfynd__ContentDocument__c	Text(18)	Stores content document ID
3	Document	docfynd__Document__c	Master-Detail(Document)	Stores document ID

4	Last Modified By	LastModifiedById	Lookup(User)	
5	Created By	CreatedById	Lookup(User)	
6	Document Link ID	Name	Auto Number	

Object : HashTag

Object Name	Hashtag
Object API Name	docfynd__hashTag__c

Sl. No.	Name	API Name	Data Type	Description
1	Total Hashtag Links	docfynd__totalHashtagLinks__c	Roll-Up Summary(COUNT Hashtag Link)	Contains no. of hashtag links available in records
2	Last Modified By	LastModifiedById	Lookup(User)	
3	Created By	CreatedById	Lookup(User)	
4	Hashtag Name	Name	Text(80)	
5	Owner	OwnerId	Lookup(User,Group)	

Object : Hashtag Link

Object Name	Hashtag Link
Object API Name	docfynd__hashTagLink__c

Sl. No.	Name	API Name	Data Type	Description
1	Record Related To	docfynd__RecordRelatedTo__c	Text(18)	Stores Record ID
2	Last Modified By	LastModifiedById	Lookup(User)	
3	Created By	CreatedById	Lookup(User)	
4	Hashtag Link ID	Name	Auto Number	
5	Hashtag	docfynd__hashTag__c	Master-Detail(Hashtag)	Stores Hashtag ID

Object : Object To Link

Object Name	Object To Link
Object API Name	docfynd__objectToLink__c

Sl. No.	Name	API Name	Data Type	Description
---------	------	----------	-----------	-------------

1	Field Api Name	docfynd__fieldApiName__c	Text(255)	Stores Record ID
2	Last Modified By	LastModifiedById	Lookup(User)	
3	Created By	CreatedById	Lookup(User)	
4	Object To Link ID	Name	Auto Number	
5	Object To Link	docfynd__objectToLink__c	Master-Detail(Hashtag)	
6	Field Label	docfynd__fieldLabel__c	Text(255)	
7	Is Parent	docfynd__isParent__c	Checkbox	
8	Process	docfynd__Process__c	Master-Detail(Process)	
9	Object Label	docfynd__objectLabel__c	Text(255)	

Key Components

Sl. No.	Name/Entity	Type	Description
1	DocFynd	App	The DocFynd App
2	DocfyndAdmin	Permissionset	Permission set for the DocFynd Admin
3	DocfyndUser	Permissionset	Permission set for the DocFynd user
4	navDocUpload	Aura Component	This aura component is used to navigate from document list view to document upload screen
5	tagProcessTab	Aura Component	This aura component is used in custom tab for user to create tag process
6	criterialist	LWC	This component displays a list of criteria for the document / tag process. Also it will provide for user to add new entry criteria
7	docLabel	LWC	This component displays a document label inside the data table. This is a custom column which extends the standard LWC data table
8	docTable	LWC	This component extends the standard LWC data table to add custom column to display document label
9	documentList	LWC	This component displays a list of document information available for the record
10	documentUpload	LWC	This component displays matching and available document categories to upload a file
11	objectToLinkList	LWC	This component is used to add related objects for tag process
12	processDocumentList	LWC	This component is used to add document categories

			for document process
13	processList	LWC	This component is used to display list of document or tag process
14	processOverview	LWC	This component is used to display process information and its related criteria / field updates / document to upload and related objects to tag
15	recordHashTag	LWC	This component helps user to search and add hashtag for the record
16	utility	LWC	This is a common component to handle the error and display success and error message to the user
17	DocumentCategory	Trigger	This trigger is to check if the document category was added in the process document before deleting the category. If it was added, then it will throw an error
18	ProcessDocument	Trigger	This trigger validates the following • The document category cannot be added more than once in the process. • Other type document categories cannot be added in the process. • Check if at least one document added in the process
19	ConstantUtils	Apex Class	Constant class contains all the read only values
20	DocActions	Apex Class	Handles document list actions in document list LWC
21	DocActionUtils	Apex Class	This class contains common functionality and logics across all document related actions
22	DocCategoryTRActions	Apex Class	This class executes from the trigger to validate all document category CRUD operations
23	DocInfo	Apex Class	Wrapper class contains all document information
24	DocUploadActions	Apex Class	Handles document upload actions in upload document LWC
25	DocUtils	Apex Class	This class contains common functionality and logics related to the document upload actions and criteria check actions
26	FLS_CL	Apex Class	This class contains functionality to check CRUD permission on both object and field level
27	HashTagActions	Apex Class	This class contains all functionality and logics related to hashtag actions
28	ProcessActions	Apex Class	This class handles all document / tag process actions
29	ProcessDocTRActions	Apex Class	This class executes from the trigger to validate all process document CRUD operations
30	ProcessRecDocCategor	Apex Class	This class contains all code related to the record

	y		process document actions
31	RecordDocInfo	Apex Class	Wrapper class contains record document info
32	RecordDocument	Apex Class	Wrapper class contains record document details
33	RecordProcessDocInfo	Apex Class	Wrapper class contains record process document info
34	TagDocumentActions	Apex Class	Class handles all tag document actions

List of Objects

List of Objects

SI.No.	Name	API Name	Description
1	Process	docfynd__Process__c	Stores information about document or tag process
2	Criteria	docfynd__Criteria__c	Stores criteria's (Field condition) to check the record and update the field value
3	Document Category	docfynd__DocumentCategory__c	Contains document category
4	Process Document	docfynd__ProcessDocument__c	Represents the types of documents (Document category) and conditions to upload for the process
5	Document Info	docfynd__DocumentInfo__c	Stores document category and its related status for the record
6	Document	docfynd__Document__c	Stores document related information
7	Document Link	docfynd__DocumentLink__c	Contains document and related record link
8	Hashtag	docfynd__hashTag__c	Contains hashtag
9	Hashtag Link	docfynd__hashTagLink__c	Contains hashtag and related record link
10	Object To Link	docfynd__objectToLink__c	Contains objects to link

Object Name: Process

Object Name	Process
Object API Name	docfynd__Process__c

Sl. No.	Name	API Name	Data Type	Description
1	Process Name	Name	Text(80)	
2	Object	docfynd__Object__c	Picklist	Stores selected object.

3	Description	docfynd__Description__c	Text Area(255)	Stores description of the process
4	Process Type	docfynd__ProcessType__c	Picklist	This field determines whether it is tag or document process
5	Object Logical Condition	docfynd__ObjectLogicalCondition__c	Picklist	Stores condition format like "AND" or "OR" for process criteria of an object
6	Process Sequence	docfynd__ProcessSequence__c	Number(4, 0)	Stores the order of the process
7	Owner	OwnerId	Lookup(User, Group)	
8	Last Modified By	LastModifiedById	Lookup(User)	
9	Created By	CreatedById	Lookup(User)	
10	Is Active	docfynd__IsActive__c	Checkbox	This field determines whether the process is active or inactive. value true means active, false means inactive.
11	Total Process Docs	docfynd__totalProcessDocs__c	Roll-Up Summary(COUNT Process Docs)	Contains no. of process docs available in process
12	Total Obj To Link	docfynd__totalObjToLink__c	Roll-Up Summary(COUNT Object To Link)	Contains no. of objects to link available in process

Object : Criteria

Object Name	Criteria
Object API Name	docfynd__Criteria__c

Sl. No.	Name	API Name	Data Type	Description
1	Value	docfynd__Value__c	Text(255)	Stores object field value
2	Type	docfynd__Type__c	Text(255)	Stores object field type
3	Object	docfynd__Object__c	Text(255)	Stores object API name
4	Label	docfynd__Label__c	Text(255)	Stores object field label
5	Field	docfynd__Field__c	Text(255)	Stores object field API name
6	Operator	docfynd__Operator__c	Picklist	Stores operator type to check the field value
7	Criteria Type	docfynd__CriteriaType__c	Picklist	This field determines whether it is criteria to check or update.

8	Order	docfynd__Order__c	Number(18, 0)	Stores order of the criteria
9	Owner	OwnerId	Lookup(User, Group)	
10	Last Modified By	LastModifiedById	Lookup(User)	
11	Created By	CreatedById	Lookup(User)	
12	Process	docfynd__Process__c	Lookup(Process)	Stores the process record ID (Lookup field)
13	Criteria ID	Name	Auto Number	

Object : Document Category

Object Name	Document Category
Object API Name	docfynd__DocumentCategory__c

Sl.No.	Name	API Name	Data Type	Description
1	Document Category Name	Name	Text(80)	
2	Is Other Category	docfynd__IsOtherCategory__c	Checkbox	Checkbox to represent if document category is other category
3	Total Process Documents	docfynd__TotalProcessDocs__c	Roll-Up Summary(COUNT Process Document)	Contains no. of documents available in process
4	Total Documents	docfynd__TotalDocs__c	Roll-Up Summary(COUNT Document Info)	Contains no. of documents available in records
5	Owner	OwnerId	Lookup(User, Group)	
6	Last Modified By	LastModifiedById	Lookup(User)	
7	Created By	CreatedById	Lookup(User)	

Object : Process Document

Object Name	Process Document
Object API Name	docfynd__ProcessDocument__c

Sl. No.	Name	API Name	Data Type	Description
---------	------	----------	-----------	-------------

1	Folder Name	docfynd__FolderName__c	Text(255)	Stores the folder name to save the file
2	Folder ID	docfynd__Folder__c	Text(255)	Stores the folder ID to save the file
3	File Types Allowed	docfynd__FileTypesAllowed__c	Picklist (Multi-Select)	Stores the types of file format allowed to upload
4	Process	docfynd__Process__c	Master-Detail(Process)	Stores document Process ID
5	Document Category	docfynd__DocumentCategory__c	Master-Detail(Document Category)	Stores document category ID
6	Last Modified By	LastModifiedById	Lookup(User)	
7	Created By	CreatedById	Lookup(User)	
8	Is Required	docfynd__IsRequired__c	Checkbox	Contains the information whether the file is required for the document category.
9	Process Document ID	Name	Auto Number	

Object : Document Info