

ConfluxFiles: Quickstart Guide

This guide will help you to get started with the ConfluxFiles component

Instructions

- Once you've installed the ConfluxFiles package, the post-install script creates the organization-wide custom setting to allow comment, upload, and draw functionality to every user by default.
- If required, you can create the profile- or user-specific settings.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'custom settings' and a list with 'Custom Settings' selected. The main content area is titled 'Custom Settings Configuration'. It includes instructions on how to add new settings for lists or hierarchies. Below this, there's a section for 'Default Organization Level Value' with a table of permissions. At the bottom, there's a 'New' button highlighted with a red box, and a table of existing settings.

Setup | Home | Object Manager

custom settings

Custom Code

Custom Settings

Didn't find what you're looking for?
Try using Global Search.

Custom Setting Configuration

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country code and the country name.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on a specific profile, or just a general user.

Edit Delete

▼ Default Organization Level Value

Location	Digital Flask Avoin yhtiö	Can approve	Can draw
Can comment	✓	✓	✓
Can upload	✓		

View: All Create New View

A B C D E F G H I J K L M N O P Q

New Create new settings

Action	Setup Owner	Location
View Edit Del	CF Customer User	Profile

If you're planning to give your community users any permissions, make sure that their profile can access the custom settings definitions.

The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar has a search bar with 'profile' and a list with 'Profiles' selected. The main content area is titled 'Profiles'. It shows two sections: 'Enabled Custom Metadata Type Access' and 'Enabled Custom Setting Definitions Access'. The 'Enabled Custom Setting Definitions Access' section is highlighted with a red box, showing a table with 'Custom Setting Definition Name' and 'AppExchange Pack' columns. The value 'ConfluxFiles.confluxf.Configuration' is listed under the 'Custom Setting Definition Name' column.

profile

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

Profiles

Enabled Custom Metadata Type Access

Edit

No Custom Metadata Types enabled

Enabled Custom Setting Definitions Access

Edit

Custom Setting Definition Name	AppExchange Pack
ConfluxFiles.confluxf.Configuration	

- You can use a component on any page layout. The only thing it requires is a record id. Open the page layout builder, drag and drop the ConfluxFiles component to it.

Components

Fields

Search...

Record Detail - Mobile

Related List - Single

Related List Quick Links

Related Lists

Related Record

Report Chart

Rich Text

Salesforce Anywhere Messages

Tabs

Topics

Trending Topics

Visualforce

Custom (0)

No components available.

Custom - Managed (1)

C

Conflux Files

Product Submission

Hringur - Concept Store - Package

Concept

Design

Name

Hringur - Concept Store - Package

Status

Concept

Created By

Tim Barr, 19.2.2021 1.35

Owner

Tim Barr

Last Modified By

Tim Barr, 19.2.2021 1.35

Files (2)

Upload Files

Or drop files

hringur-box

hringur-box-tshirt

If you're planning to use it on the layout other than record layout, provide record id value in the component properties.

The record layout in the Lightning Communities doesn't pass its id automatically. Set record id value to `{!recordId}` in the component properties.

- If required, you can rename the component in its properties.

[Analyze](#)[Activation...](#)[Save](#)

Page > Conflux Files

Title

Files

Record Id

{!recordId}

Set Component Visibility

Filters

[+ Add Filter](#)

Important! The component has two required fields that aren't visible by default. The limitation is coming from Salesforce as it doesn't allow to set rich text fields as required.

- Set the visibility of the following fields manually:
 - confluxf__TaskReplyLink__c.confluxf__Comment__c - required to insert a reply to a comment.
 - confluxf__Path__c.confluxf__D__c - required to insert a free drawing.

Comment

SaveCancel	
Field Label	Comment
Data Type	Rich Text Area(32768)

Field-Level Security for Profile	☒ Visible
Analytics Cloud Integration User	☒
Analytics Cloud Security User	☒
Authenticated Website	☒
Authenticated Website	☒

 Congratulations! You're all set now and can start using the component.

- If you have any questions or need help with the setup, don't hesitate to contact us at support@confluxfiles.com.
- You can find other "How to" articles in our knowledge base at <https://confluxfiles-developer-edition.eu40.force.com/s/>.