



USER GUIDE Doc2File App

Documents to Salesforce Files Conversion

OVERVIEW

Doc2File is One-click solution to use Salesforce Documents in Salesforce Lightning. This free App will help the user to convert single or multiple documents into Salesforce Files that too by clicking on Button. Also, the user has the facility to delete the documents from Salesforce Classic if needed. Later user can see all converted files in form of a list.

Download and install DocToFile App from AppExchange

- 1- Click on the link to [Download the Package from AppExchange](#) and then click on the **Get IT Now** button.
2. Enter your **username** and **password** for the Salesforce organization in which you want to install the package, and then click on **Log In**.

Where do you want to install this package?

Install in a Production Environment

Install this package in the org where you or your users work, including Developer Edition orgs.

* Connected Salesforce Accounts ⓘ

poojathakuriftm@mindful-impala-krvgvm.com

Don't see your account? [More Info](#)

Install in Production

Install in a Sandbox

Test this package in a copy of a production org.

Install in Sandbox

Cancel

3. **Choose options:** Install for Admins Only, Install for All Users, or Install for Specific Profiles.

☒ Install for Admins Only

☐ Install for All Users

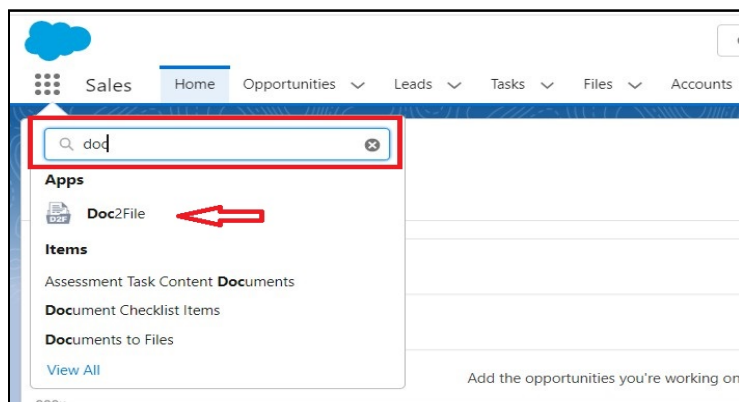
☐ Install for Specific Profiles...

Install Cancel

5. Accept the terms and conditions, then click Confirm and Install.

6. Once the installation is successfully done, you will receive a confirmation notification of package installation.

7. Now you can find Doc2File App from App Launcher.



How to use Doc2File App

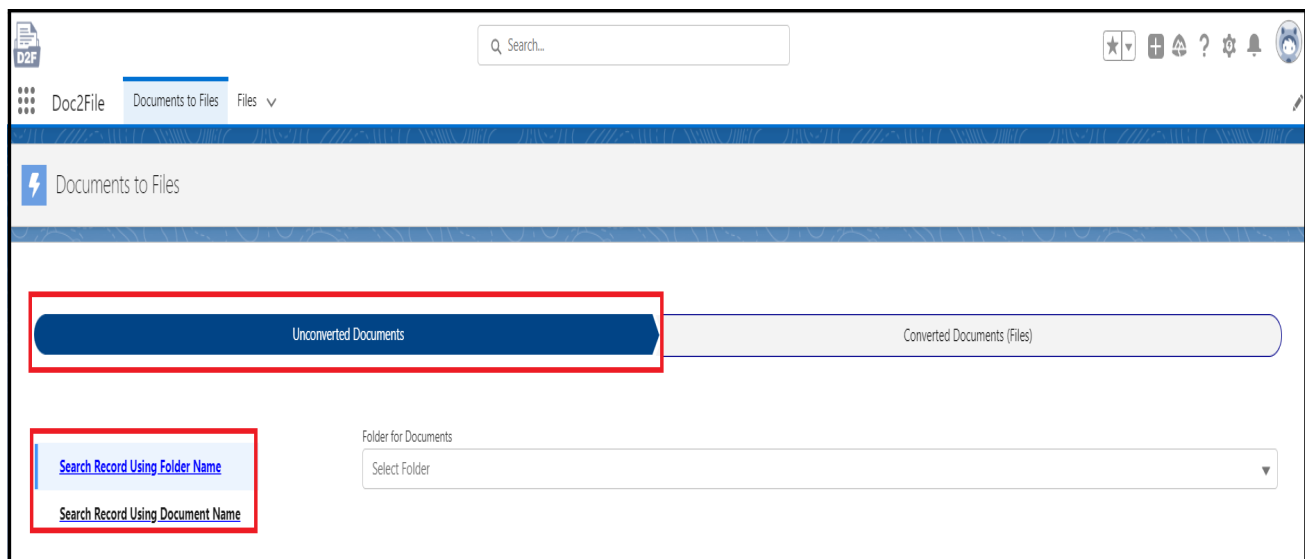
Doc2File app is especially for converting Documents into Lightning files.

1. In App, there are two Tabs: **Unconverted Document Tab** and **Converted Document(s)Files Tab**.

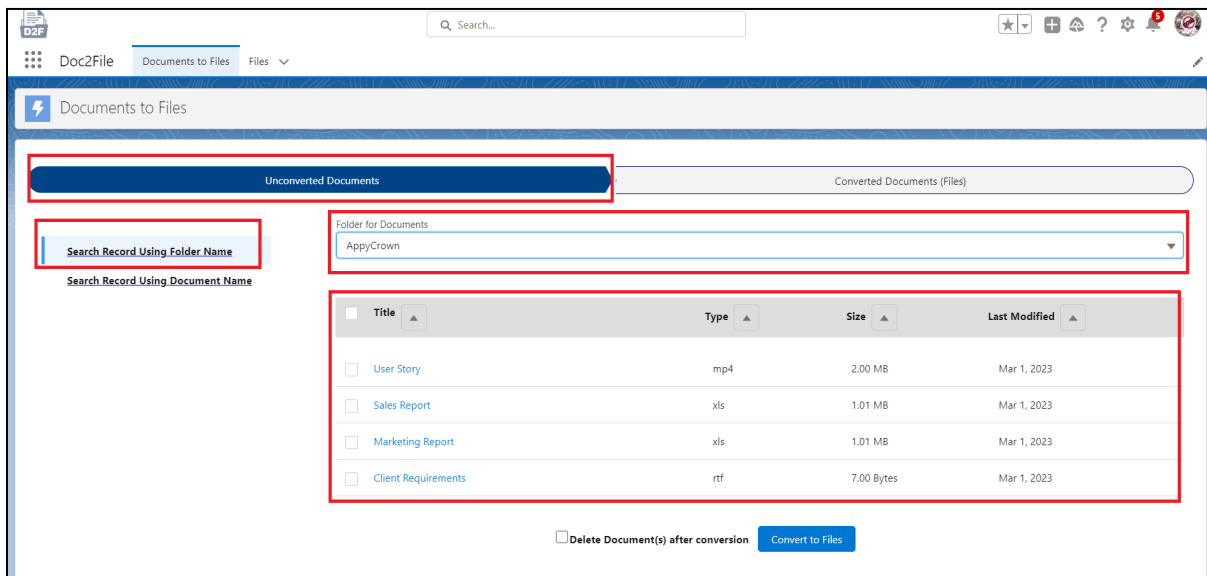
Unconverted Document Tab is by default selected, once you land on Doc2File App.

Unconverted Document Tab gives two options to select the Documents for conversion:

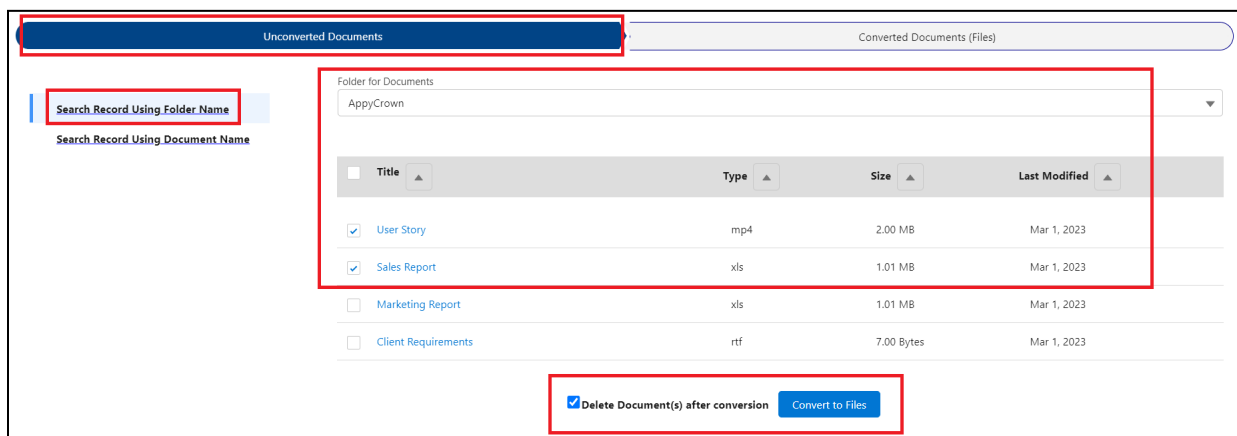
- Search Record Using Folder Name
- Search Record Using Document Name



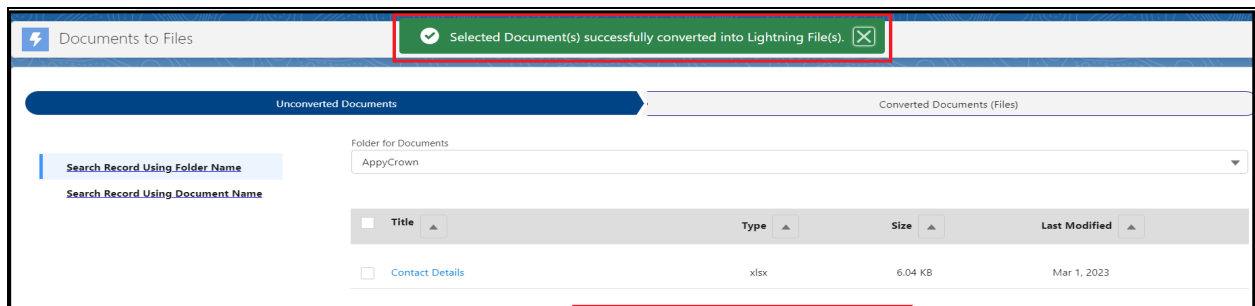
- User can search the Document(s) by selecting '**Search Record Using Folder Name**' option. Here, the user can select a folder to convert the Document(s). All the Document(s) will be displayed in Listview once the folder is selected.



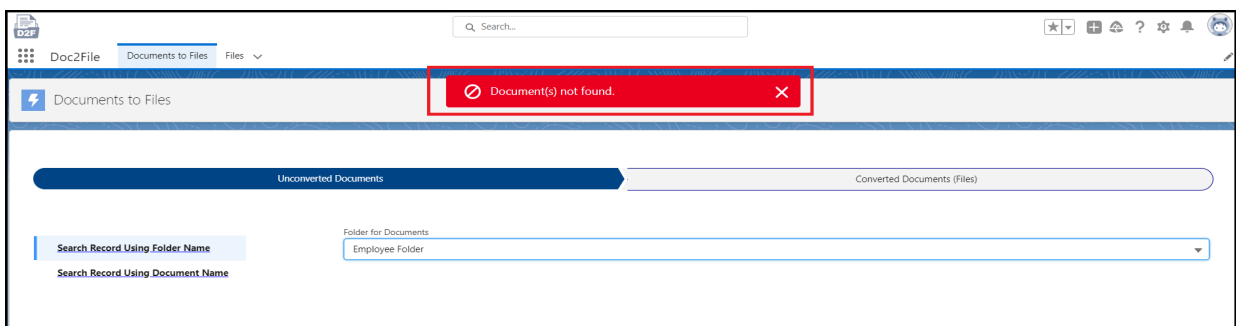
Then user can select the Document(s) by checking CheckBox resides before the documents. At the bottom, the user can check another CheckBox if he/she doesn't want to keep the file(s) in Salesforce Classic and then click on the **Convert to Files** button to convert document(s).



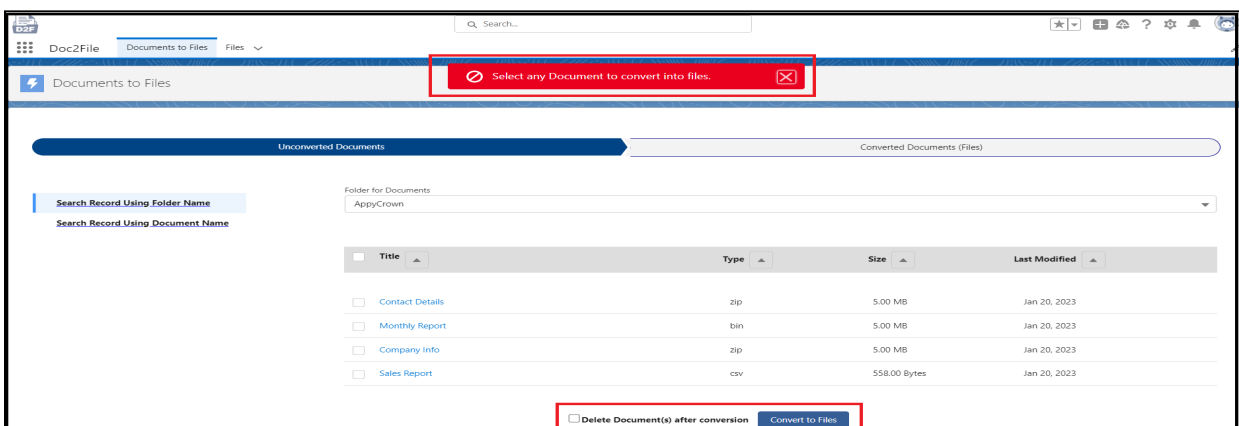
After that user will get the message of Document(s) conversion as shown in the below image.



If there no document(s) is there in the selected folder user will get the message "Document(s) not found".



If the user will try to click on the Convert Files button without checking any document he will get the message "Select any Document to convert into Files".



- User can search the Document(s) by selecting ‘**Search Record Using Document(s) Name**’ option. Here, the user can find Document(s) by entering a keyword.

All the documents will be displayed related to that keyword in the Listview.

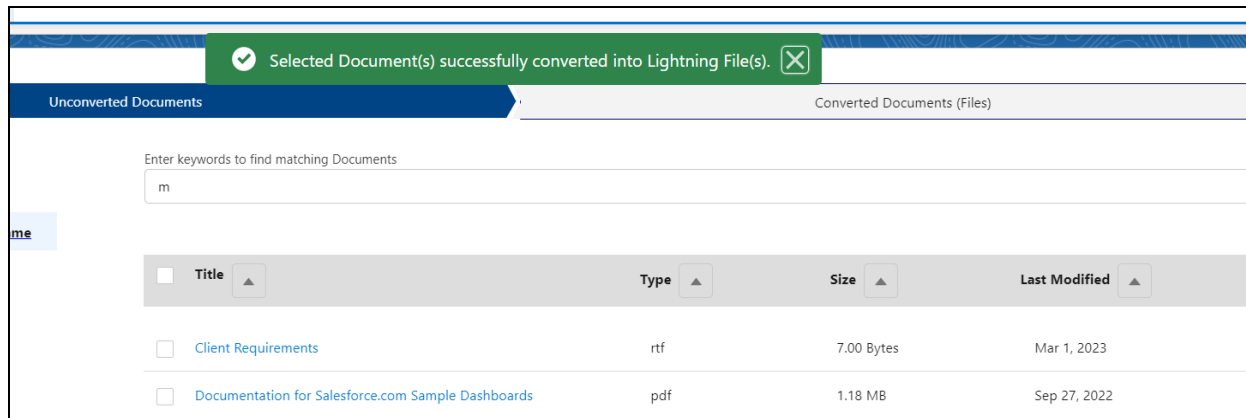
The screenshot shows a web interface with two tabs: 'Unconverted Documents' (active) and 'Converted Documents (Files)'. On the left, there are two search options: 'Search Record Using Folder Name' and 'Search Record Using Document Name' (selected). A search bar contains the keyword 'm'. Below the search bar, a table lists documents matching the keyword. Each row has a checkbox, a title, a type, a size, and a last modified date.

☐	Title	Type	Size	Last Modified
☐	Free_Test_Data_1MB_MOV.mov	mov	1.08 MB	Mar 1, 2023
☐	Free_Test_Data_2MB_MP4.mp4	mp4	2.00 MB	Mar 1, 2023
☐	Marketing Report	xls	1.01 MB	Mar 1, 2023
☐	Client Requirements	rtf	7.00 Bytes	Mar 1, 2023
☐	Documentation for Salesforce.com Sample Dashboards	pdf	1.18 MB	Sep 27, 2022
☐	Trial - Customer Portal Header HTML	html	333.00 Bytes	Sep 27, 2022
☐	Trial - Customer Portal Footer HTML	html	127.00 Bytes	Sep 27, 2022

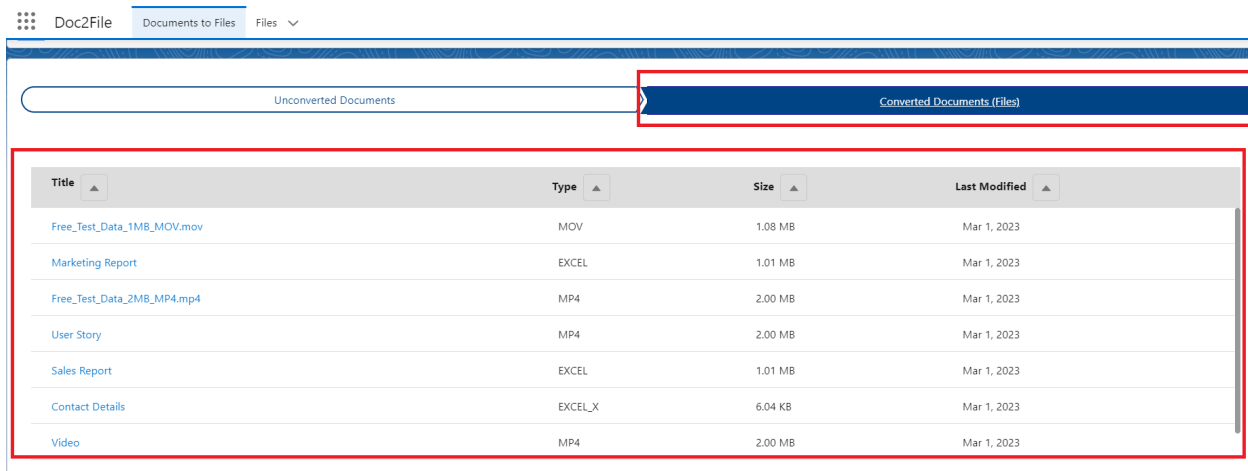
The user can select the Document(s) by checking CheckBox resides before the documents and also user can check the CheckBox if he/she doesn't want to keep the file(s) in Salesforce Classic and then click on the [Convert to File](#) button to convert document(s). A successful conversion message will be displayed.

This screenshot is similar to the previous one, but the checkboxes for the first three documents are now checked. At the bottom of the interface, there are two buttons: 'Delete Document(s) after conversion' (checked) and 'Convert to Files'.

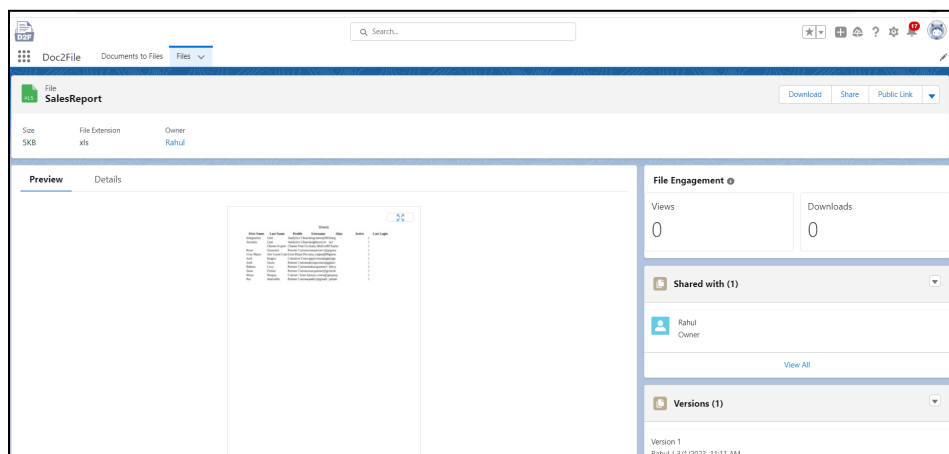
☒	Title	Type	Size	Last Modified
☒	Free_Test_Data_1MB_MOV.mov	mov	1.08 MB	Mar 1, 2023
☒	Free_Test_Data_2MB_MP4.mp4	mp4	2.00 MB	Mar 1, 2023
☒	Marketing Report	xls	1.01 MB	Mar 1, 2023
☐	Client Requirements	rtf	7.00 Bytes	Mar 1, 2023
☐	Documentation for Salesforce.com Sample Dashboards	pdf	1.18 MB	Sep 27, 2022
☐	Trial - Customer Portal Header HTML	html	333.00 Bytes	Sep 27, 2022
☐	Trial - Customer Portal Footer HTML	html	127.00 Bytes	Sep 27, 2022



2. User can see all converted documents in Tab2 i.e., [Converted Files](#). It displays the details of the documents like the Name, Type, Description, created by, and modified by.



Note: To see the preview of the converted file(s) the user can click on the file name and then the converted file preview will be available in File Tab automatically. From there converted file(s) can be downloaded and shared.



THANK YOU