

Files Attachments Notes

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OVERVIEW

The main objective of this component is to show files, attachments & notes belonging to child records under the parent records.

KEY FEATURES

Replicates the current feature as available for standard object Account in classic environments. This component not only works with Account but with other objects as well, namely Account, Contact, Opportunity, Case, Event, Task, Lead, Contract etc and Custom objects. The key features are:

1) Shows files, attachments & notes of child records.
2) Allows creation of Notes in lightning.
3) Allows uploading of multiple files at once.

BEFORE INSTALLING

Before installing this FilesNotesAttachments component we must follow this step

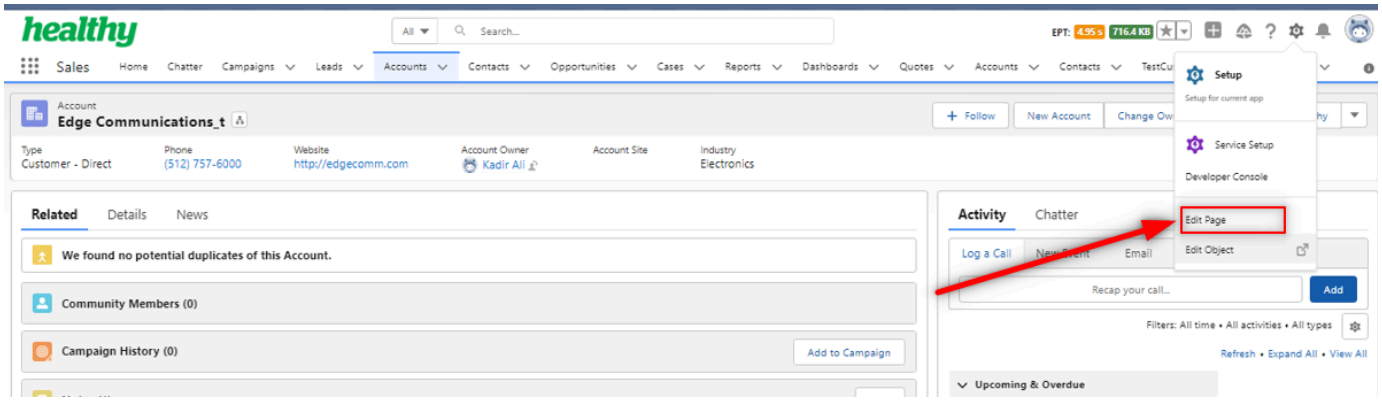
- From setup, enter Notes Settings in the Quick Find box , then select Notes Settings, Enable Notes is selected then save.
- To function correctly, the component needs read access to all parent lookup fields on child objects. Without the necessary permissions, users may encounter errors when using the component.

Example:

If our component is placed on the **Account Record Page**, and if there exists any **Object** (e.g., Contact) that is related to this Account (i.e., it is a child object of the Account object), then the user must have **read access** to the **Account lookup field** on the **child object**.
Without this permission, the component may not load properly.

GETTNG STARTED

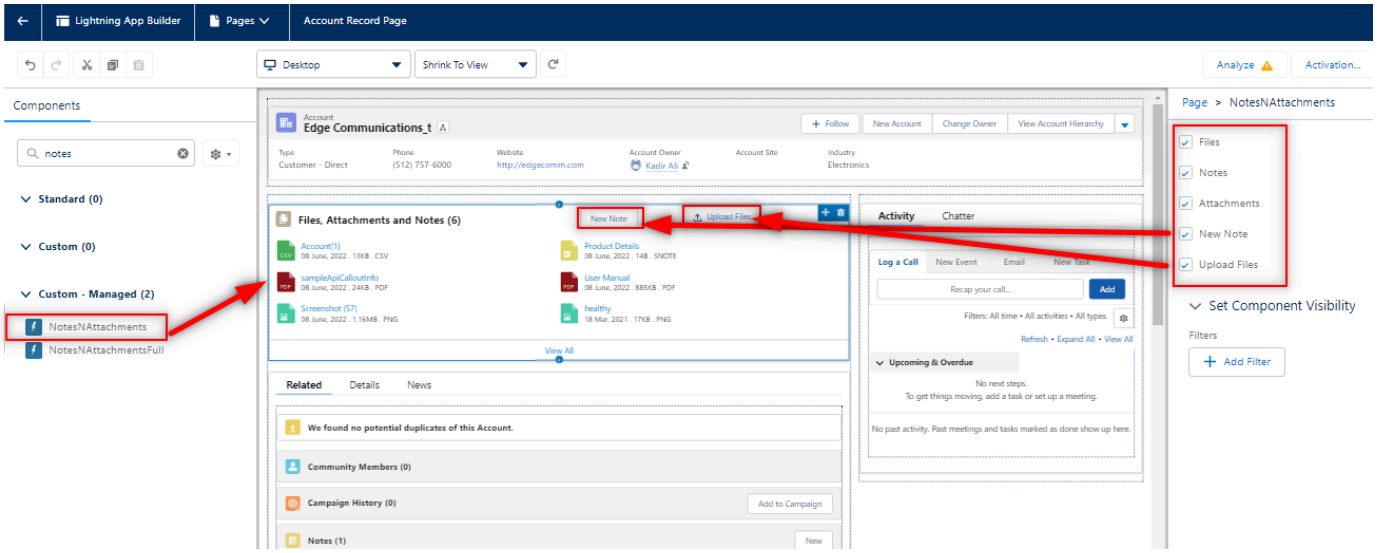
1) From the record detail page, Click on the edit page under **Setup**.



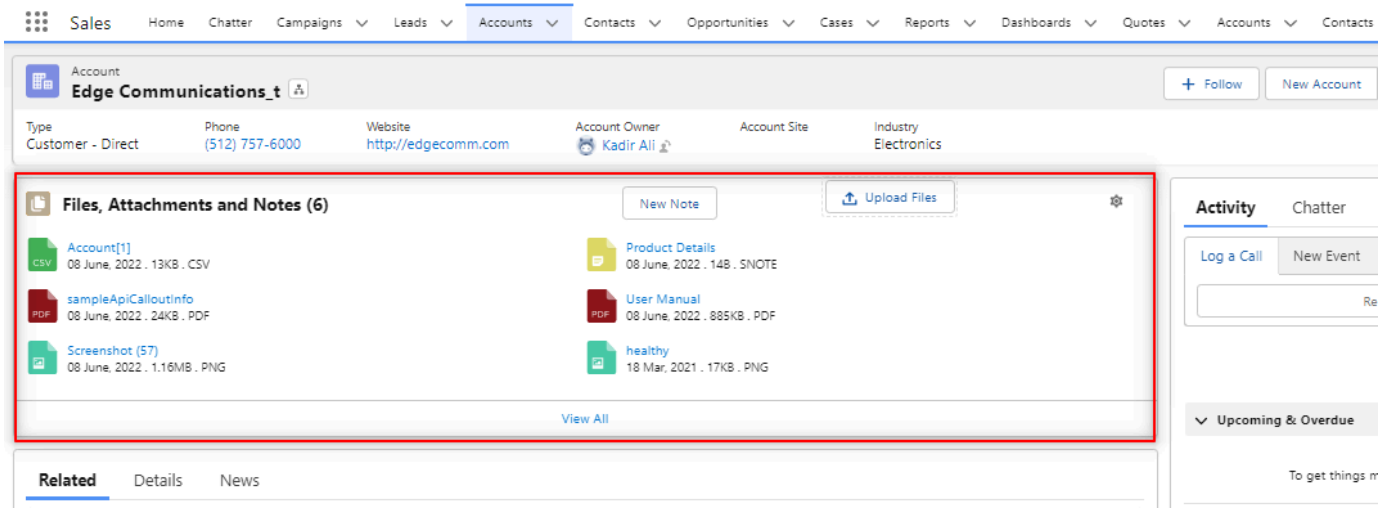
2).

A) Drag & Drop the component under Custom Managed named as NotesNAttachments to your layout.

B) In Design (panel on the right side) There are five checkboxes (Files, Notes, Attachments, New Note, Upload Files). This component shows data according to the checkbox. If you select Files in the checkbox then this component shows only Files, if you select Notes in the checkbox then this component shows only Notes. If you select Attachments from the checkbox then this component shows the child Attachments only. You can also select multiple checkboxes. You can also select the Checkbox of New Note and Upload Files as per your requirement. Activate & Save your Layout.

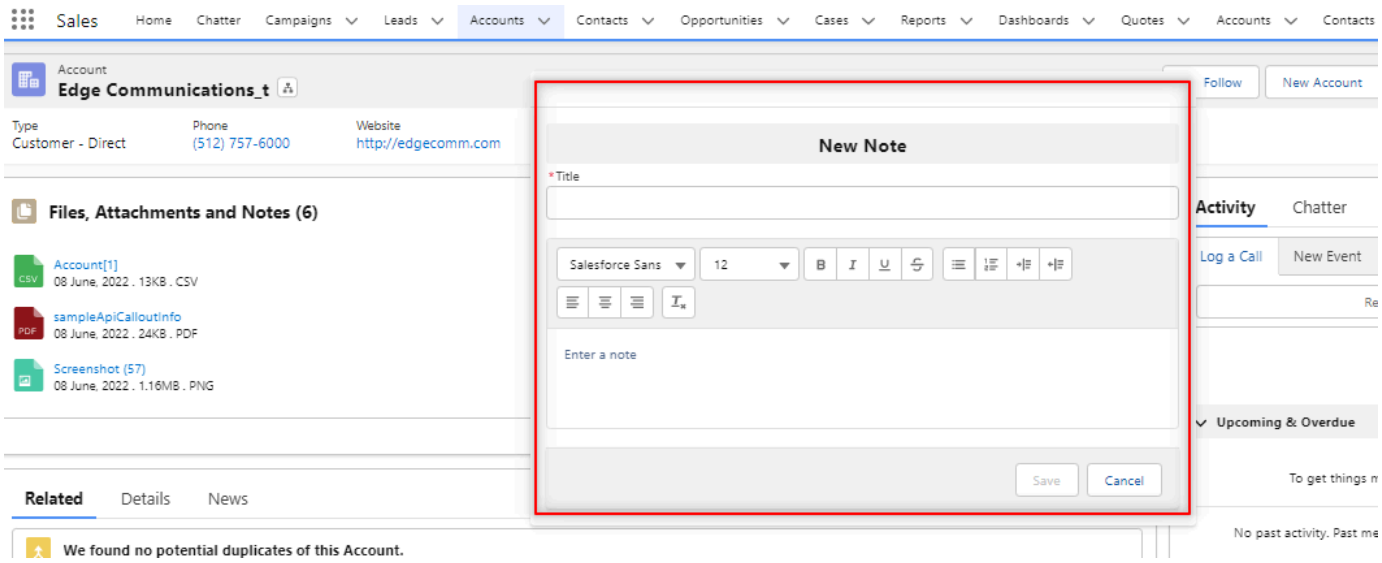


3). Now you will see the component in your record detail page. Its header is Files, Attachments and Notes.

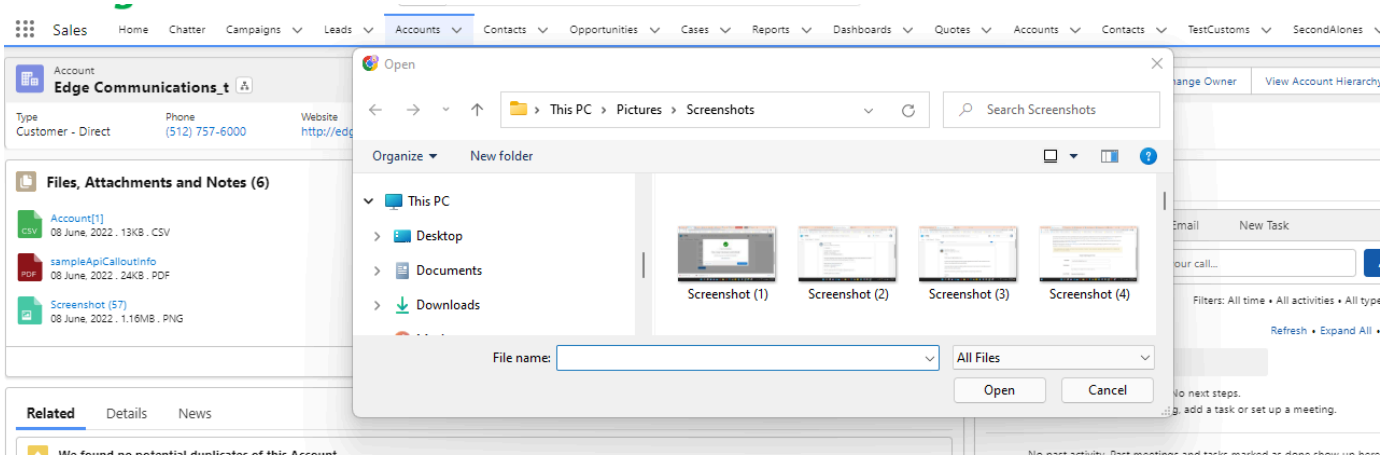


4). Clicking on **Upload Files** will allow users to upload multiple files. Clicking on **New Note** will allow the user to create a Content Note.

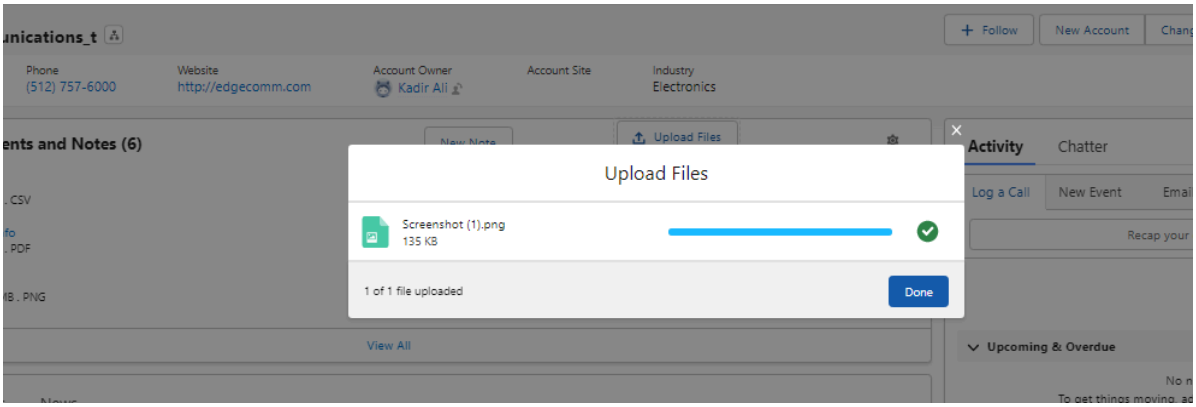
A) Content Note Creation.



B) File Upload Dialog box.

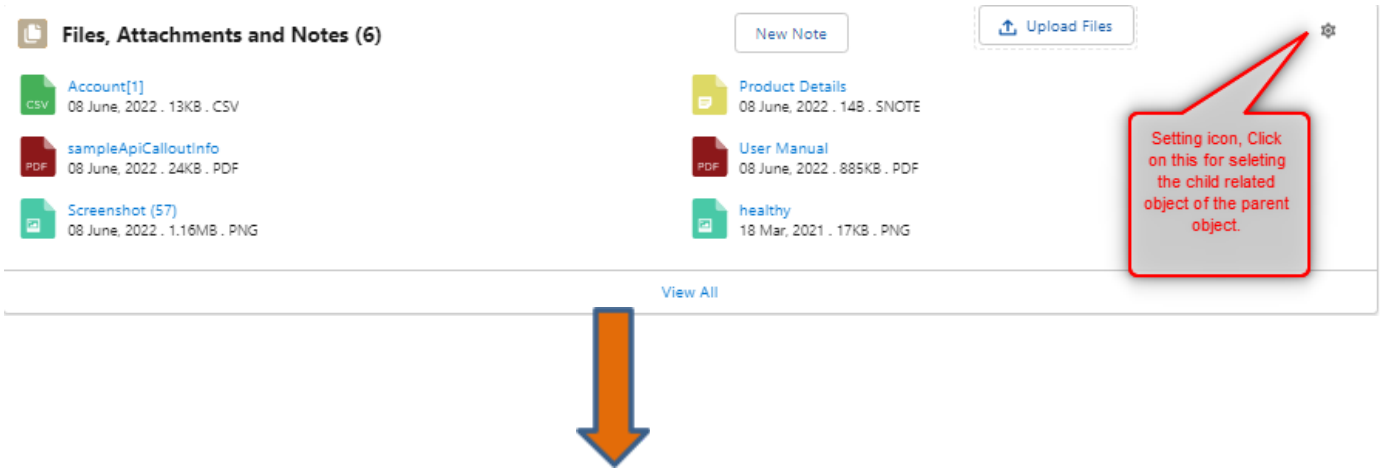


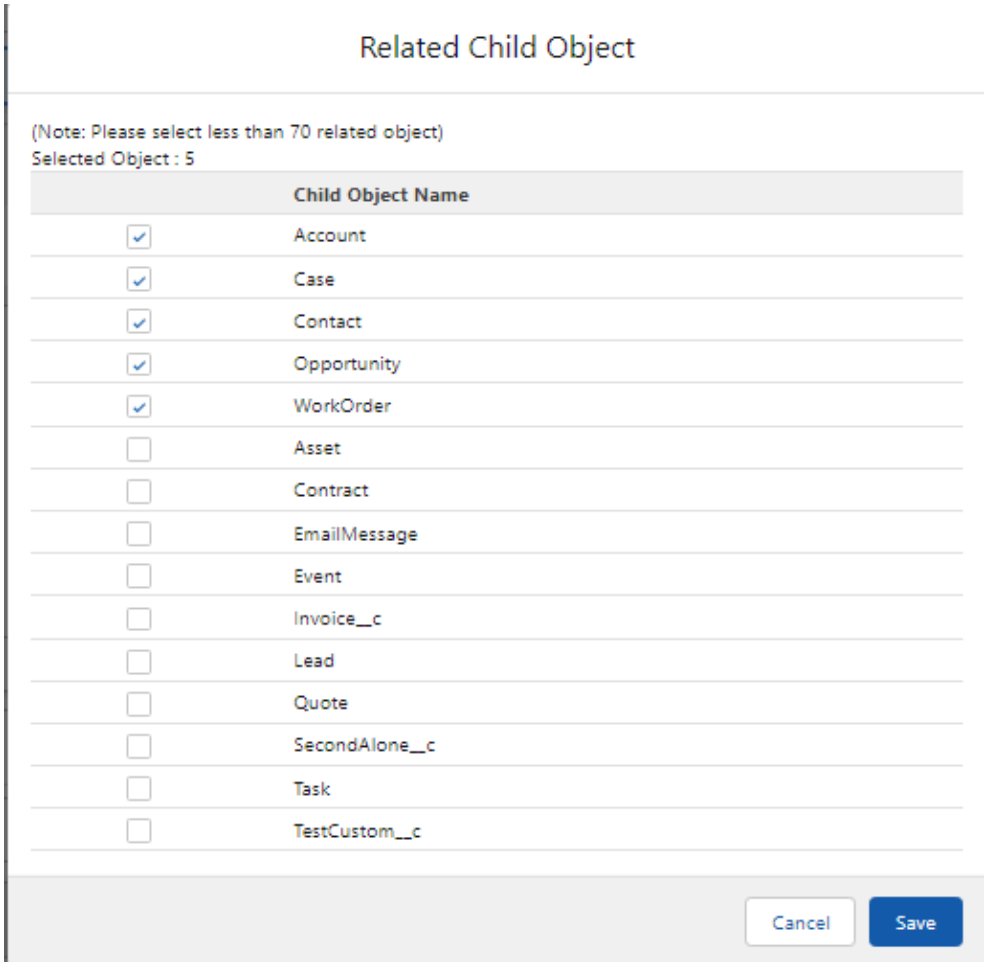
C) After successfully uploading



5). Click on the Settings icon button to select the checkbox of the child related objects to the parent object so that you can see all Files, Attachments and Notes of that (child object) on the parent record page.

Note: Settings icon would be only available to the profile named 'System Administrator' .

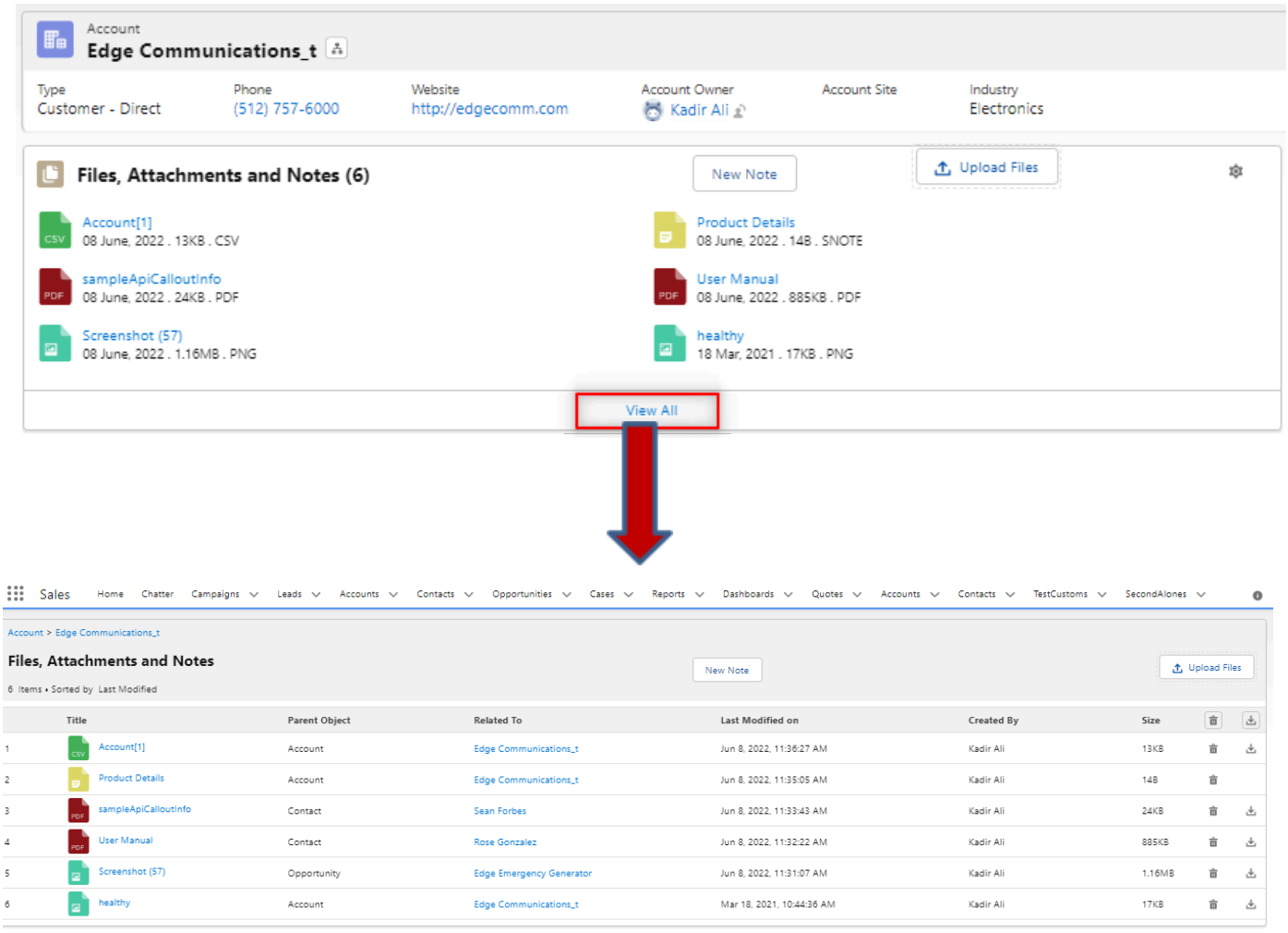




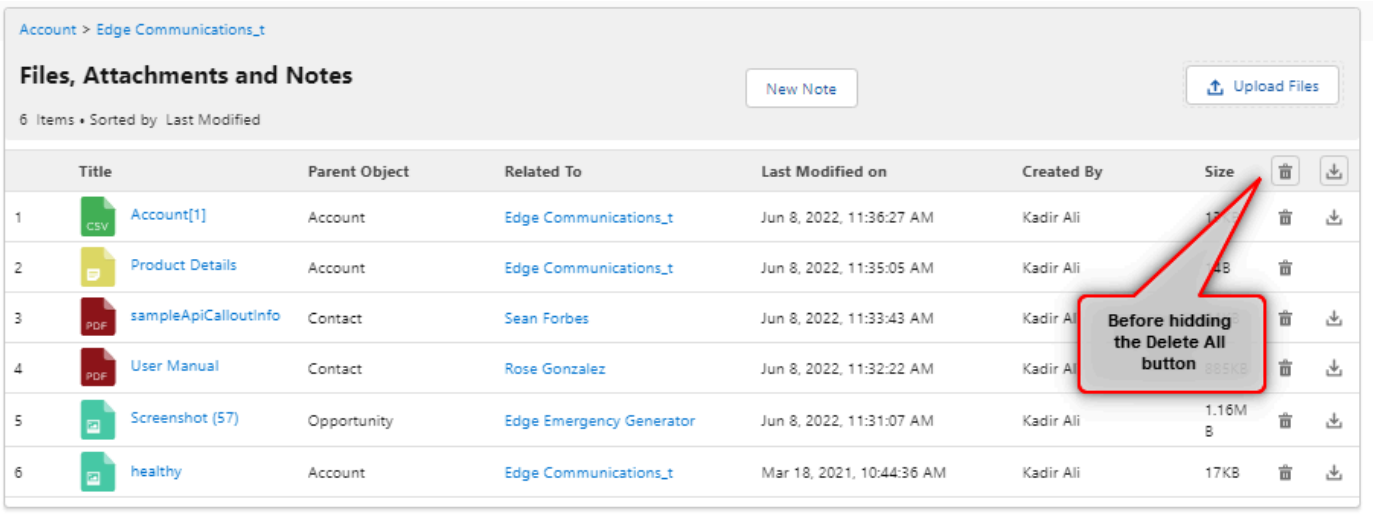
6).

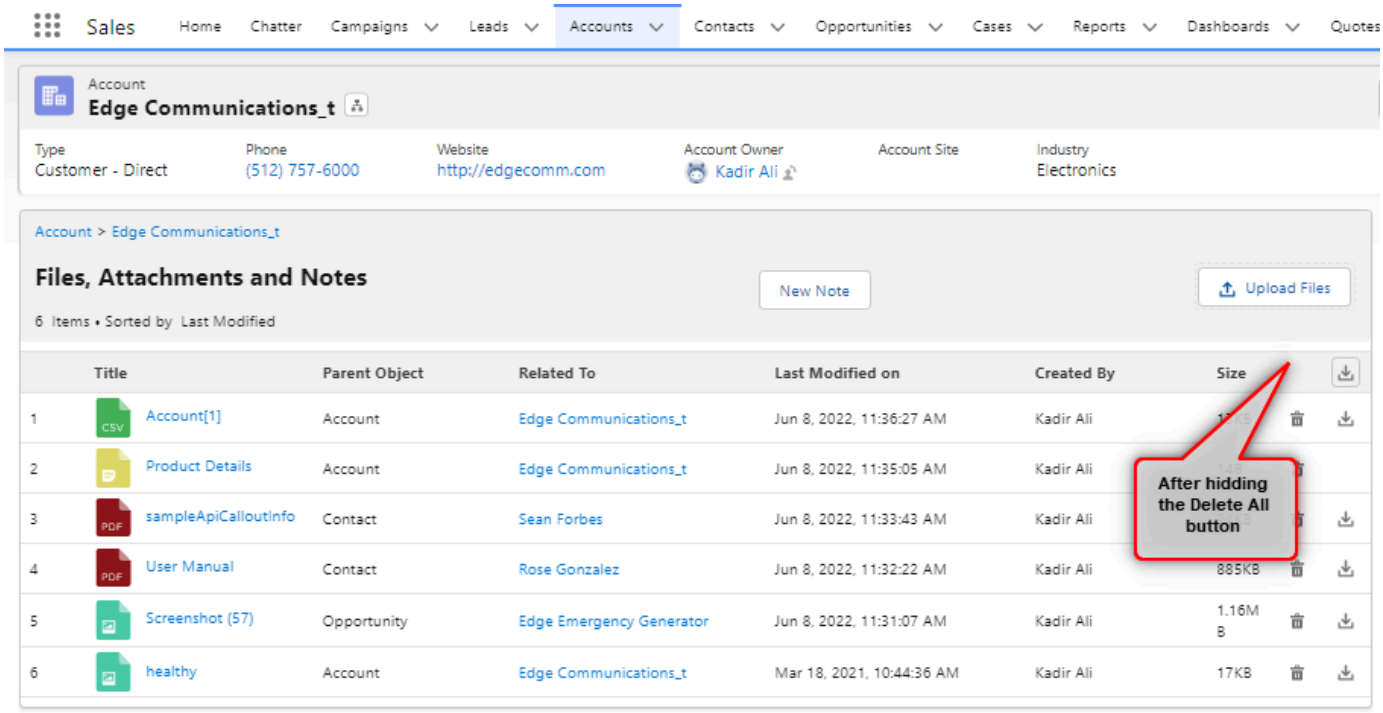
A) When the number of uploaded/created files becomes more than six, It gets hidden. only six files would be visible on the NotesNAttachment component. To see all those hidden files on that (NotesNAttachment),we click on the **View All** link. This redirects to the NotesNAttachmentFull component. Here it would show all the Files, Attachments and Notes belonging to self and child records.

B) Here you can use the functionality of downloading and deleting the files, Notes and Attachments.



7). The <u>Delete All Button</u> can be hidden or shown as shown in the image.
Steps:
Custom Setting-> DeleteButtonVisible -> Manage (click on it) ->New(give any name(like OnOffDeleteButton) and deselect or select the CheckBox (**ShowDeleteButton**) and save it.

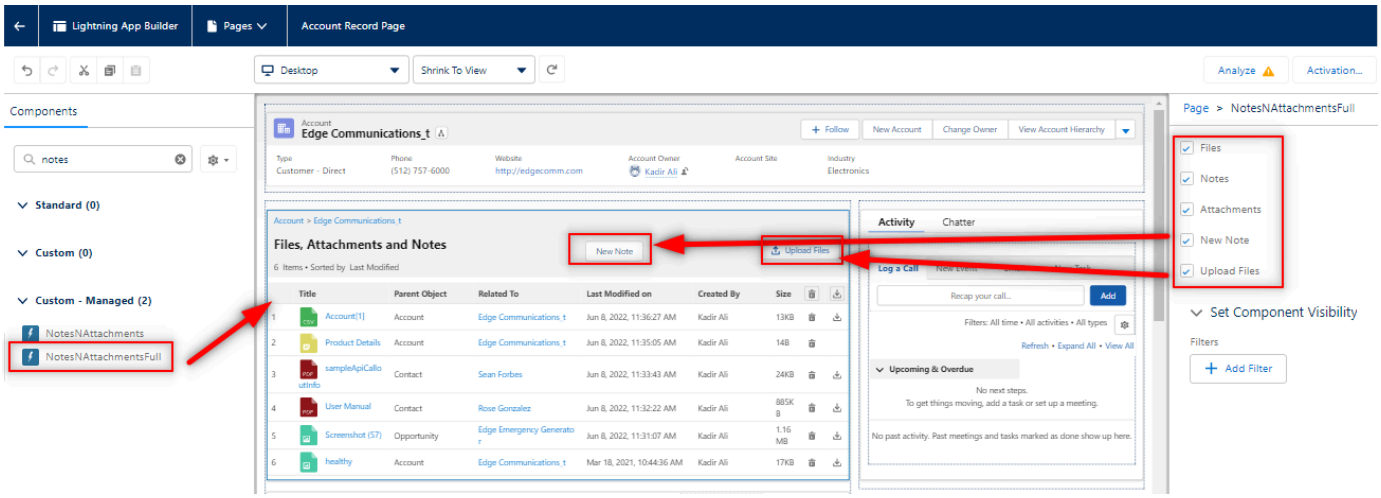



Sales
Home
Chatter
Campaigns
Leads
Accounts
Contacts
Opportunities
Cases
Reports
Dashboards
Quotes
Account
Edge Communications_t
Type
Customer - Direct
Phone
(512) 757-6000
Website
http://edgecomm.com
Account Owner
Kadir Ali
Account Site
Industry
Electronics
Account > Edge Communications_t
Files, Attachments and Notes
New Note
Upload Files
6 Items • Sorted by Last Modified
Title
Parent Object
Related To
Last Modified on
Created By
Size
1 Account[1] Account Edge Communications_t Jun 8, 2022, 11:36:27 AM Kadir Ali
2 Product Details Account Edge Communications_t Jun 8, 2022, 11:35:05 AM Kadir Ali
3 sampleApiCalloutInfo Contact Sean Forbes Jun 8, 2022, 11:33:43 AM Kadir Ali
4 User Manual Contact Rose Gonzalez Jun 8, 2022, 11:32:22 AM Kadir Ali 885KB
5 Screenshot (57) Opportunity Edge Emergency Generator Jun 8, 2022, 11:31:07 AM Kadir Ali 1.16MB
6 healthy Account Edge Communications_t Mar 18, 2021, 10:44:36 AM Kadir Ali 17KB
After hidding the Delete All button

8).

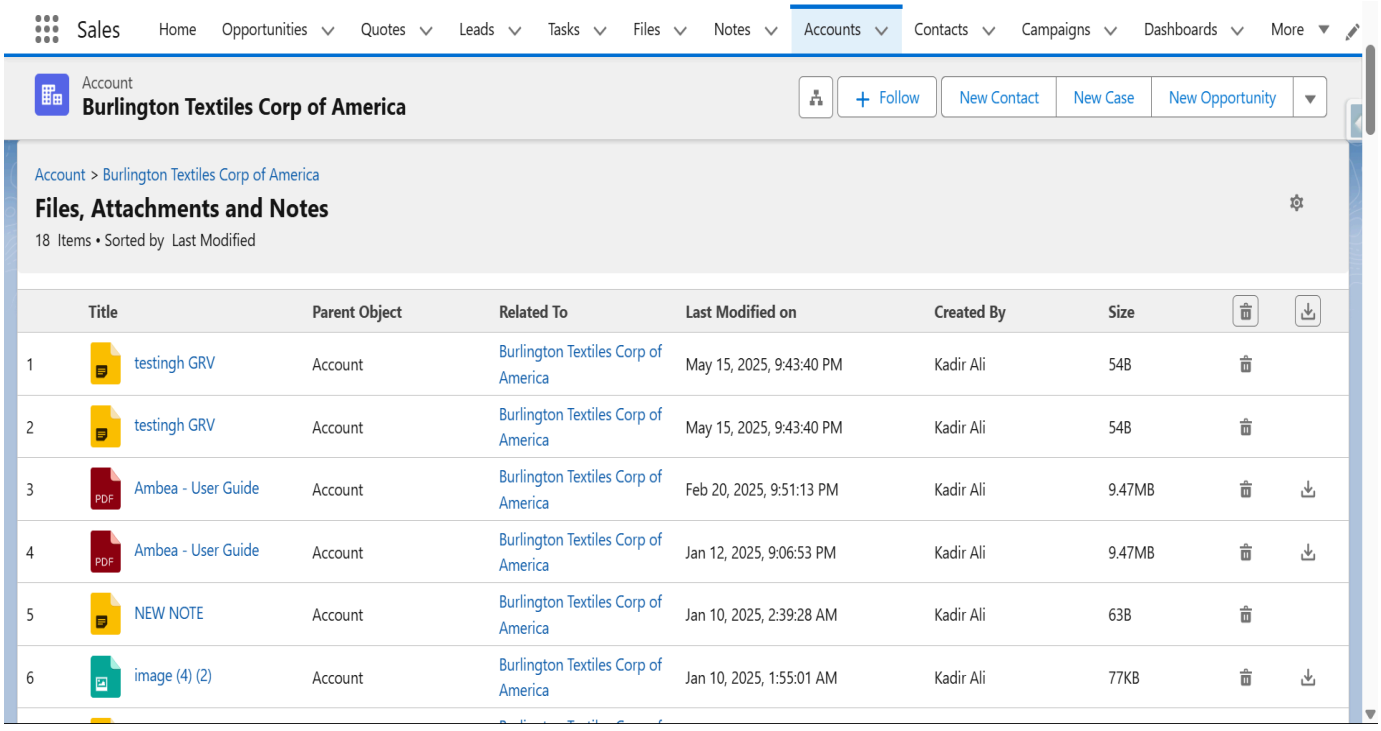
A) The component NotesNAttachmentFull can also be used independently (without using the NotesNAttachments component). It offers the same functionality as NotesNAttachment Componentbut with a more detailed and comprehensive view. Drag & Drop the component under Custom Managed named as NotesNAttachmentsFull to your layout. Drag & Drop the component under Custom Managed named as NotesNAttachmentsFull to your layout.

B) In the Design (panel on the right side) of the NotesNAttachmentFull component there are five Checkboxes (Files, Notes, Attachments, New Note, Upload Files). This component shows records according to the checkboxes selected. You can also select multiple checkboxes. You can also select the checkbox of new Note and Upload Files as per your requirement. Activate & Save your Layout.

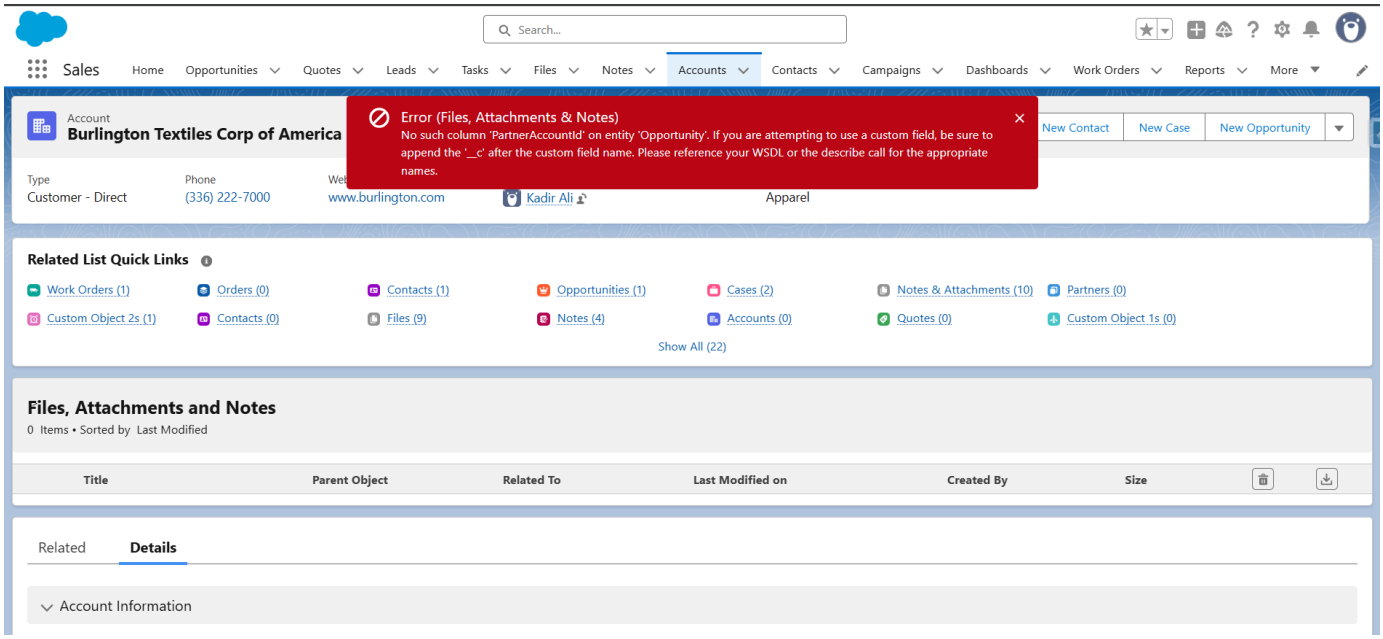


9). Now you will see the component NotesNAttachmentFull in your record detail page.

Its header is Files,Attachments and Notes.



Error Troubleshooting Guide



If you encounter an error like this, it usually means the running user does not have permission to access the specified field on the specified object. In this case, the user does not have Read access to the **ParentAccountId** field on the **Opportunity** object.

To troubleshoot this issue, you can use either of the following approaches:

Approach 1:

Provide **Read access** to the specified field on the specified object for the running user.

Approach 2:

If you do not want the specified object's related files to appear in the component, you can deselect that object by clicking on the **Gear icon** (visible only to users with the System Administrator profile).

🔔 Receiving Error Notifications via Email

If you wish to receive error messages or notifications (especially related to permission issues) on your email, you need to configure the storeEmail Custom Setting.

To do this:
Navigate to Custom Settings in Salesforce Setup.
Click on Manage button to the **store Email** Custom setting.
Create a new record and enter Name as "Email" and email address in the designated field.
This setup will ensure that you are notified via email whenever permission-related errors or similar issues occur.

LIMITATIONS

1. If the Parent object contains around 70 or more than 70 child objects then the component may not work.

SUPPORT

Please email support@astreait.com for queries.

Thank You