



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

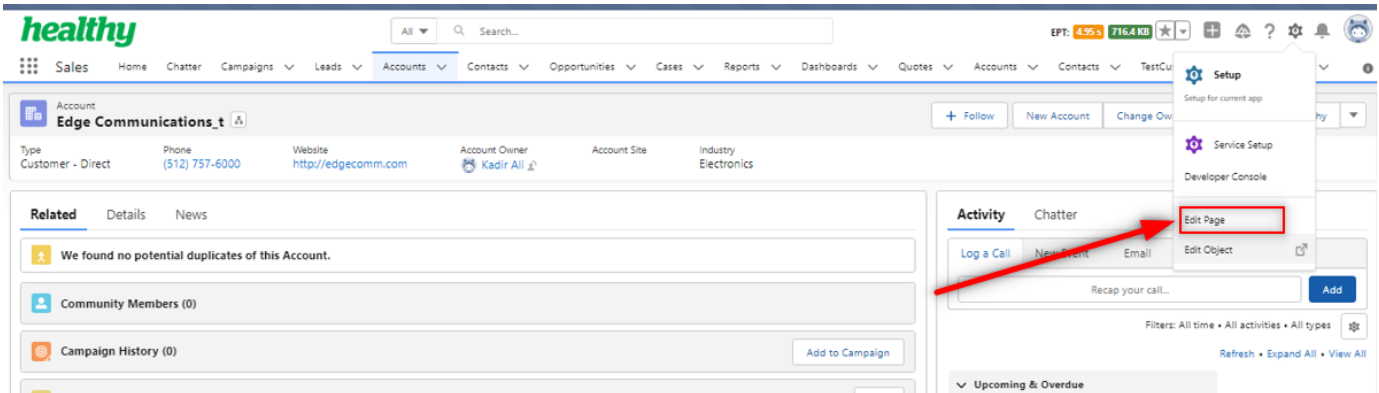
- From setup, enter Notes Settings in the Quick Find box , then select Notes Settings, Enable Notes is selected then save.
- To function correctly, the component needs read access to all parent lookup fields on child objects. Without the necessary permissions, users may encounter errors when using the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

GETTING STARTED

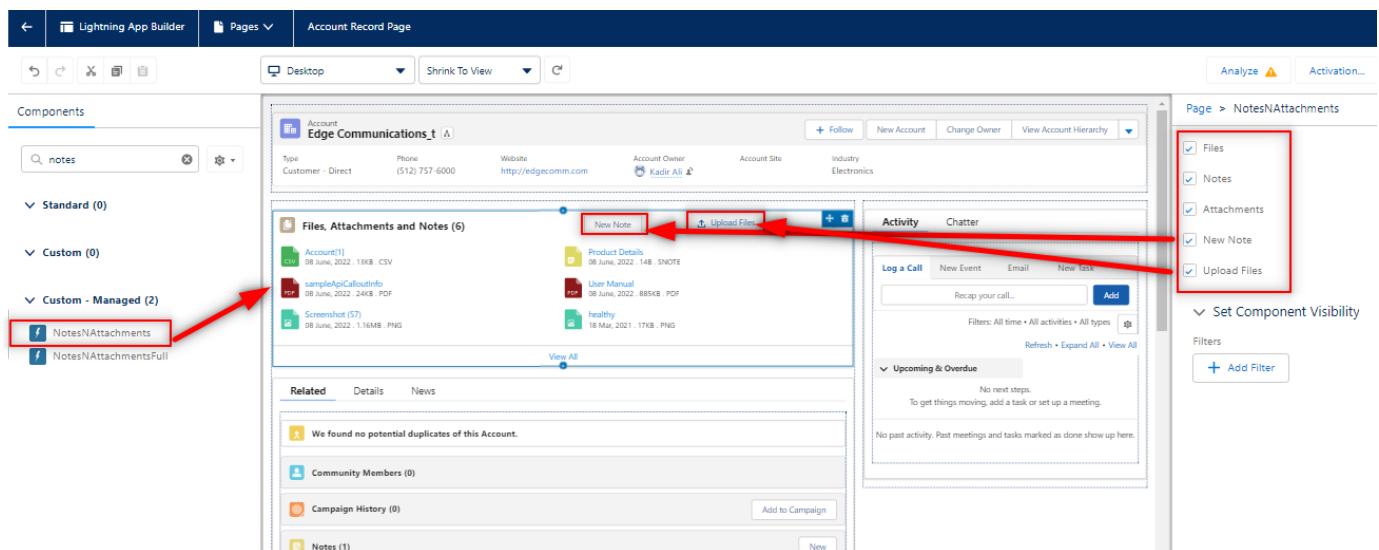
1) From the record detail page, Click on the edit page under **Setup**.



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.

Sales Home Chatter Campaigns Leads Accounts Contacts Opportunities Cases Reports Dashboards Quotes Accounts Contacts

Account
Edge Communications_t

Type: Customer - Direct Phone: (512) 757-6000 Website: http://edgecomm.com Account Owner: Kadir Ali Account Site: Industry: Electronics

Files, Attachments and Notes (6) [New Note](#) [Upload Files](#)

- Account[1]** (CSV) 08 June, 2022, 13KB
- sampleApiCalloutInfo** (PDF) 08 June, 2022, 24KB
- Screenshot (57)** (PNG) 08 June, 2022, 1.16MB
- Product Details** (SNOTE) 08 June, 2022, 148KB
- User Manual** (PDF) 08 June, 2022, 885KB
- healthy** (PNG) 18 Mar, 2021, 17KB

[View All](#)

Related Details News

Activity Chatter

[Log a Call](#) [New Event](#)

Upcoming & Overdue

To get things n

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.

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Files, Attachments and Notes (6)

- Account[1]** (CSV) 08 June, 2022, 13KB
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- Screenshot (57)** (PNG) 08 June, 2022, 1.16MB

New Note

Title

Salesforce Sans 12 B I U [Link](#) [Bulleted List](#) [Numbered List](#) [Indent](#) [Outdent](#)

Enter a note

[Save](#) [Cancel](#)

Related Details News

Activity Chatter

[Log a Call](#) [New Event](#)

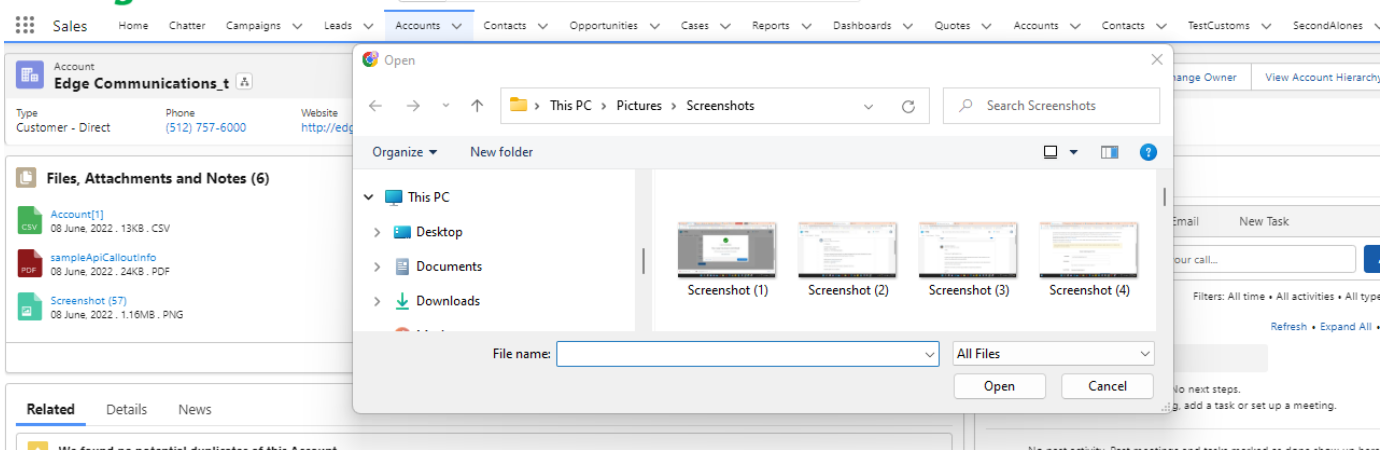
Upcoming & Overdue

To get things n

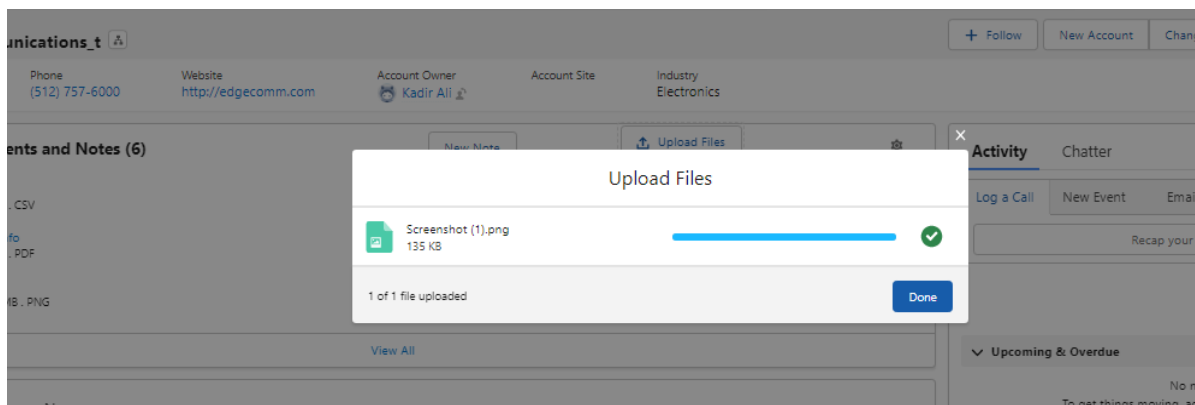
No past activity. Past me

We found no potential duplicates of this Account.

B) File Upload Dialog box.

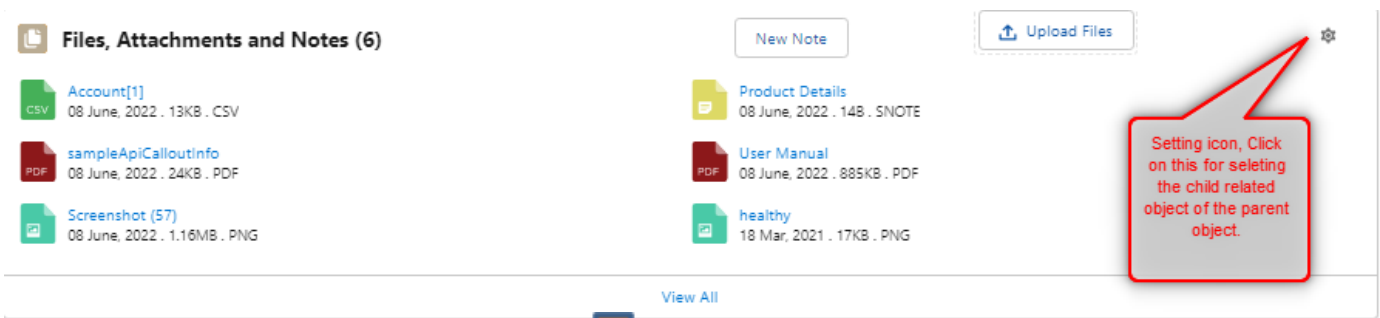


C) After successfully uploading



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' .



Related Child Object

(Note: Please select less than 70 related object)

Selected Object : 5

Child Object Name	
☒	Account
☒	Case
☒	Contact
☒	Opportunity
☒	WorkOrder
☐	Asset
☐	Contract
☐	EmailMessage
☐	Event
☐	Invoice__c
☐	Lead
☐	Quote
☐	SecondAlone__c
☐	Task
☐	TestCustom__c

Cancel

Save

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.

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Files, Attachments and Notes (6) [New Note](#) [Upload Files](#)

- Account[1]** (CSV) 08 June, 2022 . 13KB . CSV
- Product Details** 08 June, 2022 . 14B . SNOTE
- sampleApiCalloutInfo** (PDF) 08 June, 2022 . 24KB . PDF
- User Manual** (PDF) 08 June, 2022 . 885KB . PDF
- Screenshot (57)** 08 June, 2022 . 1.16MB . PNG
- healthy** 18 Mar, 2021 . 17KB . PNG

[View All](#)



Sales Home Chatter Campaigns Leads Accounts Contacts Opportunities Cases Reports Dashboards Quotes Accounts Contacts TestCustoms SecondAlones

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	13KB		
2	Product Details	Account	Edge Communications_t	Jun 8, 2022, 11:35:05 AM	Kadir Ali	14B		
3	sampleApiCalloutInfo	Contact	Sean Forbes	Jun 8, 2022, 11:33:43 AM	Kadir Ali	24KB		
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		

7). The Delete All Button 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.

Account > Edge Communications_t

Files, Attachments and Notes [New Note](#) [Upload Files](#)

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6	healthy	Account	Edge Communications_t	Mar 18, 2021, 10:44:36 AM	Kadir Ali	17KB		

Before hiding the Delete All button

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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	17 KB	 
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6	 healthy	Account	Edge Communications_t	Mar 18, 2021, 10:44:36 AM	Kadir Ali	17KB	 

After hiding
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 Component but 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.

The screenshot shows the Lightning App Builder interface. On the left, the 'Components' panel is open, showing a search for 'notes' and a list of components under 'Custom - Managed (2)'. The 'NotesNAttachmentsFull' component is selected and highlighted with a red box. A red arrow points from this component to the main design area. In the main design area, the 'NotesNAttachmentsFull' component is placed on the 'Account Record Page' for 'Edge Communications, Inc.'. The component's header is 'Files, Attachments and Notes'. Below the header is a table with 6 items. A red box highlights the 'New Note' button in the header. Another red box highlights the 'Upload Files' button in the header. A third red box highlights the 'Files' checkbox in the 'Set Component Visibility' panel on the right. A fourth red box highlights the 'New Note' checkbox in the same panel. A fifth red box highlights the 'Upload Files' checkbox in the same panel. A red arrow points from the 'New Note' button in the header to the 'New Note' checkbox in the visibility panel. Another red arrow points from the 'Upload Files' button in the header to the 'Upload Files' checkbox in the visibility panel.

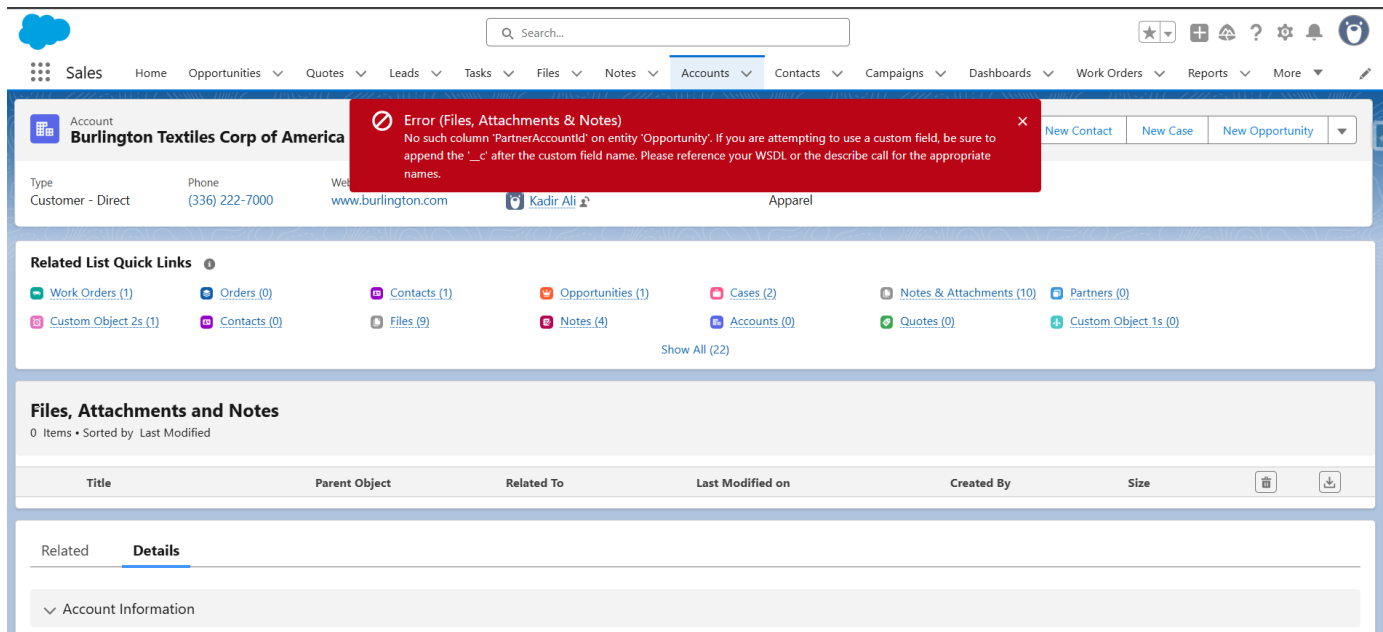
9). Now you will see the component NotesNAttachmentFull in your record detail page.

Its header is Files, Attachments and Notes.

The screenshot shows the record detail page for 'Burlington Textiles Corp of America'. The header is 'Files, Attachments and Notes'. Below the header is a table with 18 items. The table has columns: Title, Parent Object, Related To, Last Modified on, Created By, Size, and icons for delete and download. The table contains 6 rows of data:

	Title	Parent Object	Related To	Last Modified on	Created By	Size		
1	testinh GRV	Account	Burlington Textiles Corp of America	May 15, 2025, 9:43:40 PM	Kadir Ali	54B		
2	testinh GRV	Account	Burlington Textiles Corp of America	May 15, 2025, 9:43:40 PM	Kadir Ali	54B		
3	Ambea - User Guide	Account	Burlington Textiles Corp of America	Feb 20, 2025, 9:51:13 PM	Kadir Ali	9.47MB		
4	Ambea - User Guide	Account	Burlington Textiles Corp of America	Jan 12, 2025, 9:06:53 PM	Kadir Ali	9.47MB		
5	NEW NOTE	Account	Burlington Textiles Corp of America	Jan 10, 2025, 2:39:28 AM	Kadir Ali	63B		
6	image (4) (2)	Account	Burlington Textiles Corp of America	Jan 10, 2025, 1:55:01 AM	Kadir Ali	77KB		

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@astreatit.com for queries.

Thank You