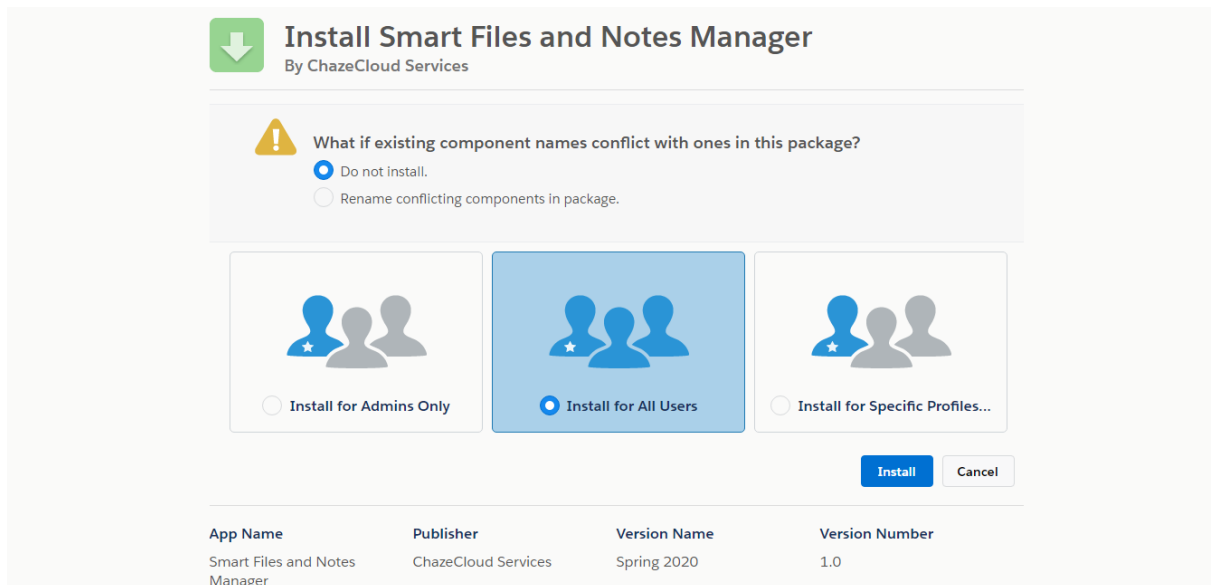


Installation and Setup

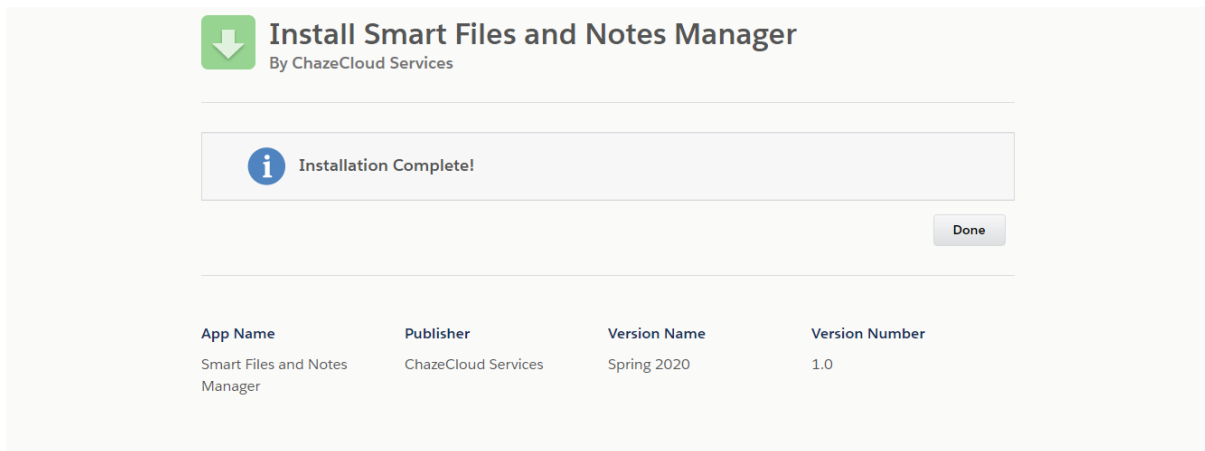
1. After purchasing the app on forceXchange you will be able to see two buttons “Install in Sandbox” and “Install in Production”. You can choose either of these two options. If you want to test this app first before using it in production environment, install it in Sandbox.
2. Go through the following steps to install the component in your Salesforce Org.
3. Click on either “Install in Sandbox” button or “Install in Production” button.
4. You may be asked to login with your Salesforce org credentials.
5. Select which type of users you want to install it for and click on the **Install** button to install the app.



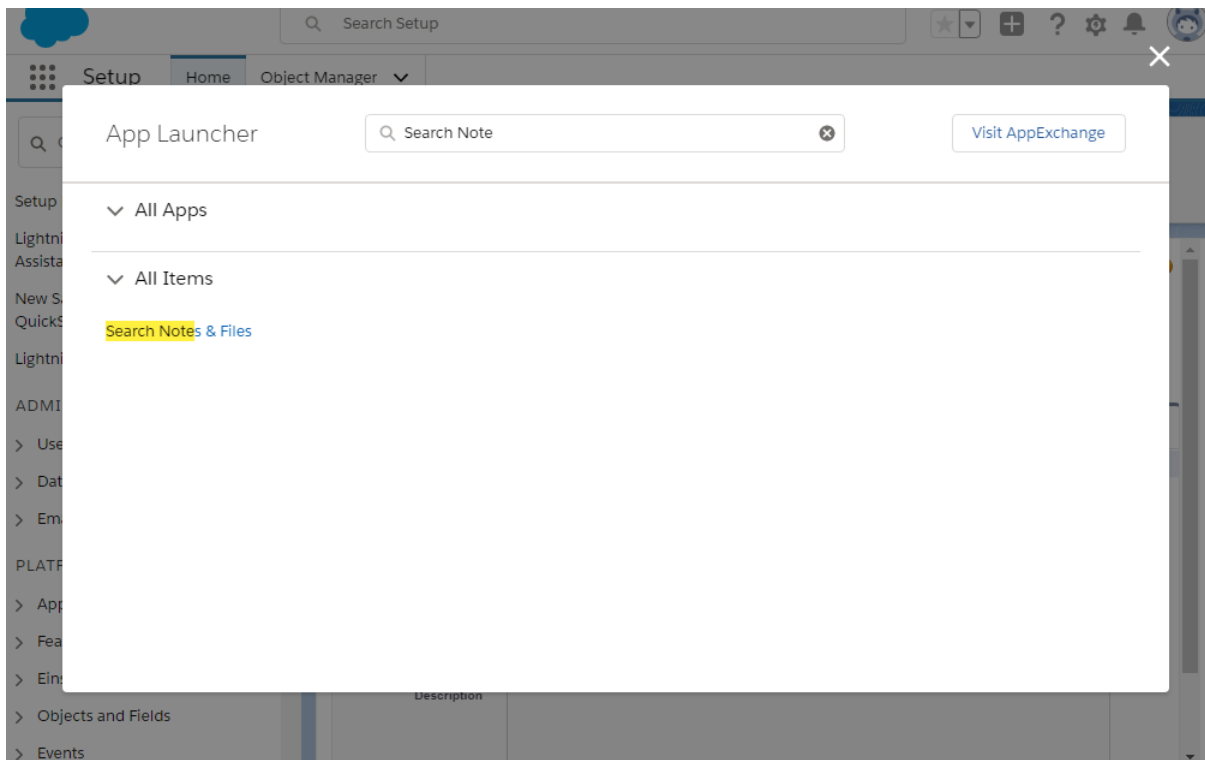
The screenshot shows the installation interface for the 'Smart Files and Notes Manager' app by ChazeCloud Services. At the top, there is a green download icon and the app name. Below this, a warning message asks: 'What if existing component names conflict with ones in this package?'. There are two radio button options: 'Do not install.' (which is selected) and 'Rename conflicting components in package.'. Below the warning, there are three user selection options, each with a radio button and an icon of three people: 'Install for Admins Only', 'Install for All Users' (which is selected and highlighted in blue), and 'Install for Specific Profiles...'. At the bottom right, there are 'Install' and 'Cancel' buttons. At the bottom, there is a table with the following information:

App Name	Publisher	Version Name	Version Number
Smart Files and Notes Manager	ChazeCloud Services	Spring 2020	1.0

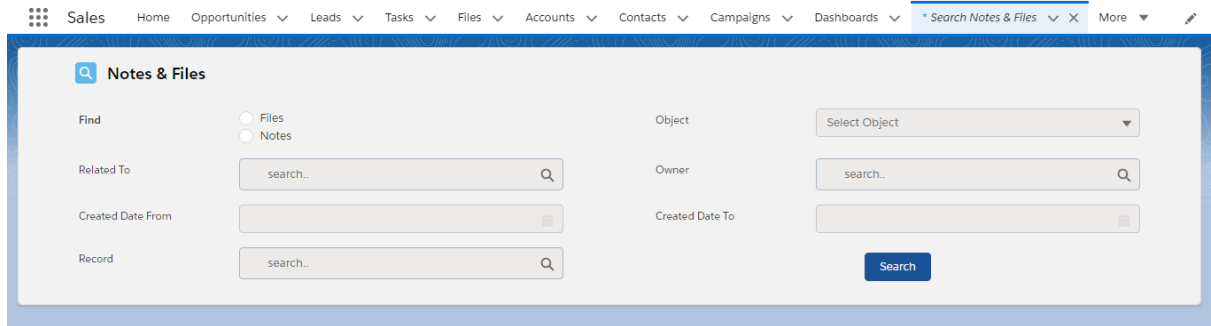
6. Wait until the Installation complete screen appears. Click the **Done** button.



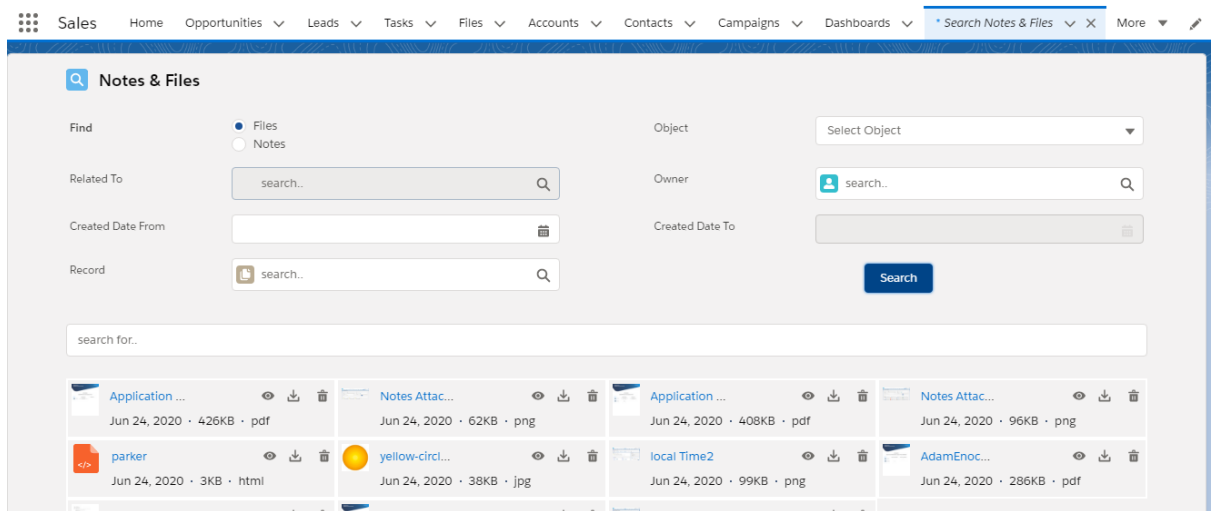
7. From Salesforce Lightning Experience App Launcher, type **Search Notes** you will see an item named **Search Notes & Files** click this item.



8. Now you will see our tab **Search Notes & Files**. Its header is **Notes & Files**.



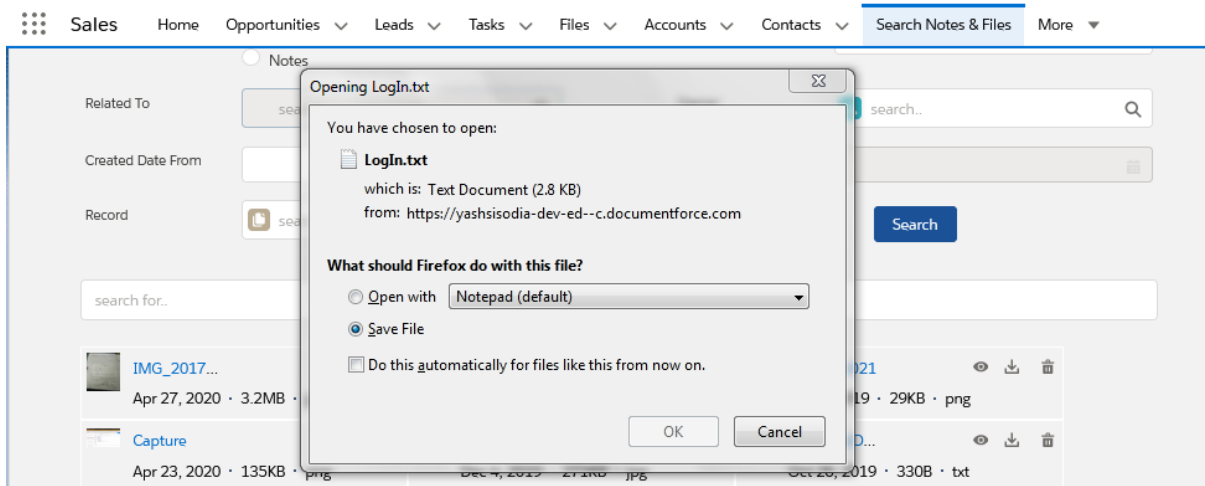
9. Clicking on **Files** radio button and then click on **Search**, this process will show you all Files in the Salesforce org. You can do the same process for **Notes**.



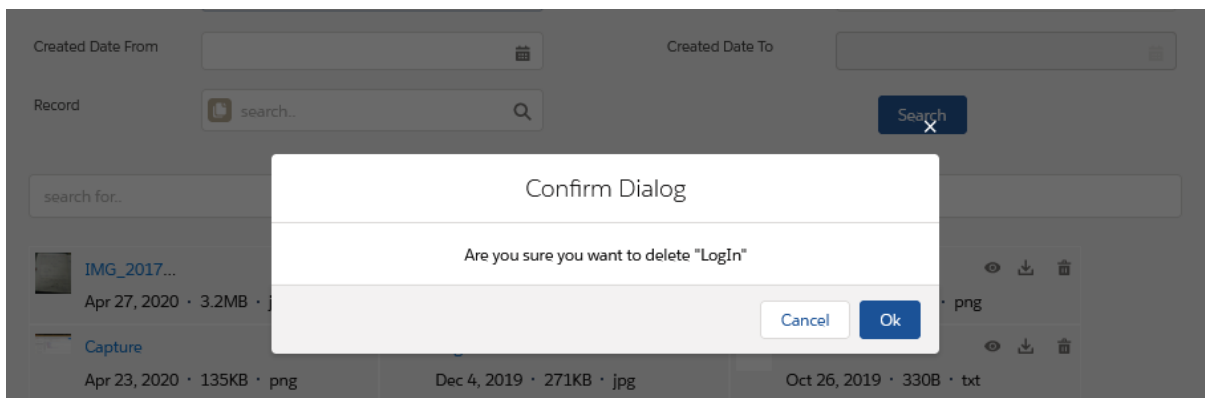
10. When you search for **Files** every file details will be shown in a box in which it will show Filename, CreatedDate, Filesize, File Extension, Eye icon, Download icon, and Delete icon. Clicking on the **Eye** icon will open the File.



11. Clicking on **Download** icon will ask user to save file.



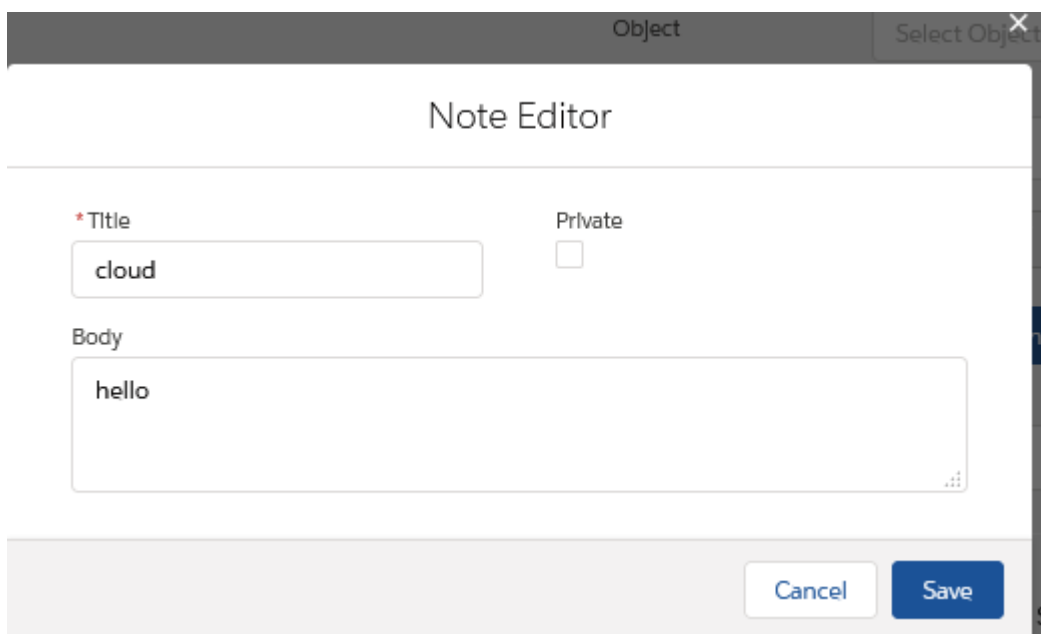
12. Clicking on the **Delete** icon will ask the user for confirmation to delete File. If user clicks on **Ok** then File will be deleted from Salesforce org.



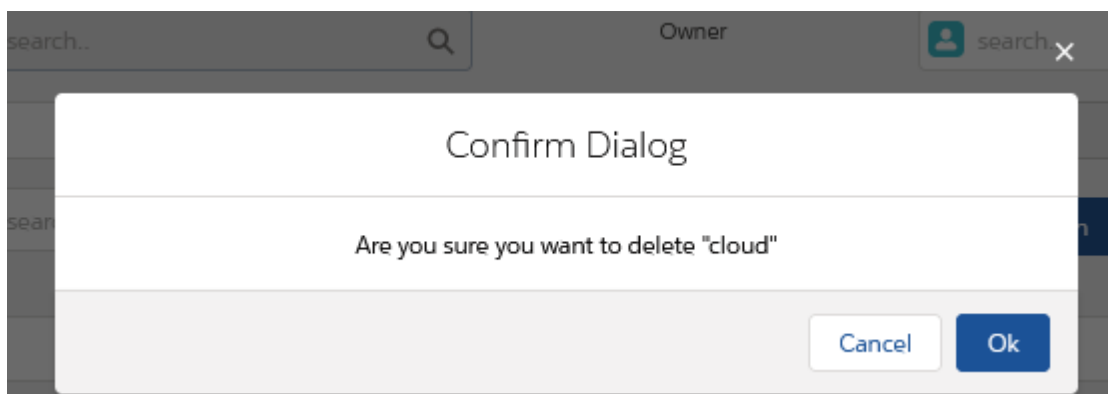
13. When you search for **Notes** every note details will be shown in a box in which it will show Note Title, CreatedDate, Owner, Eye icon, Edit icon, and Delete icon. Clicking on the **Eye** icon will open the Note.



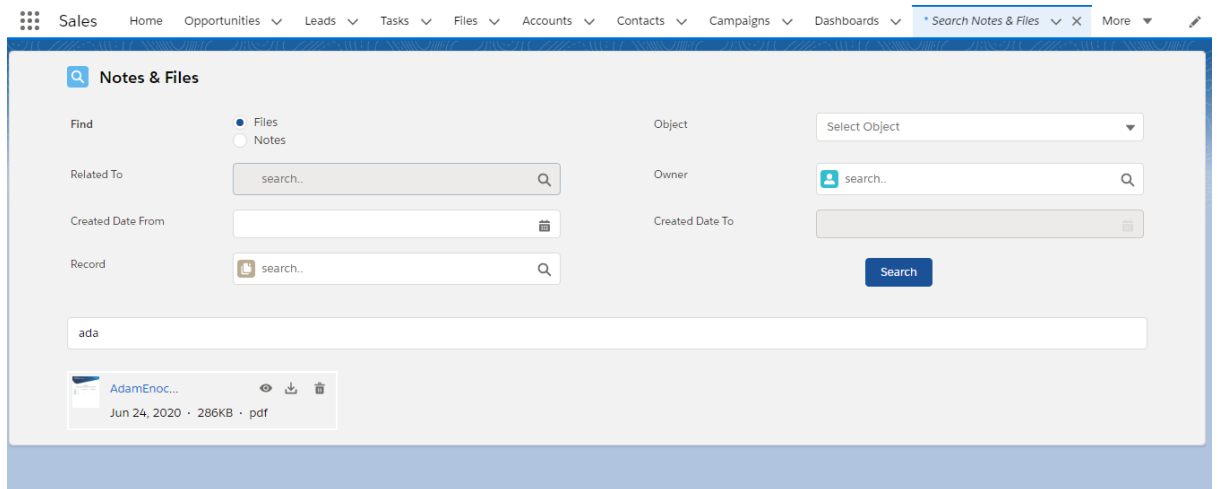
14. Clicking on the **Edit** icon will allow a user to edit note.



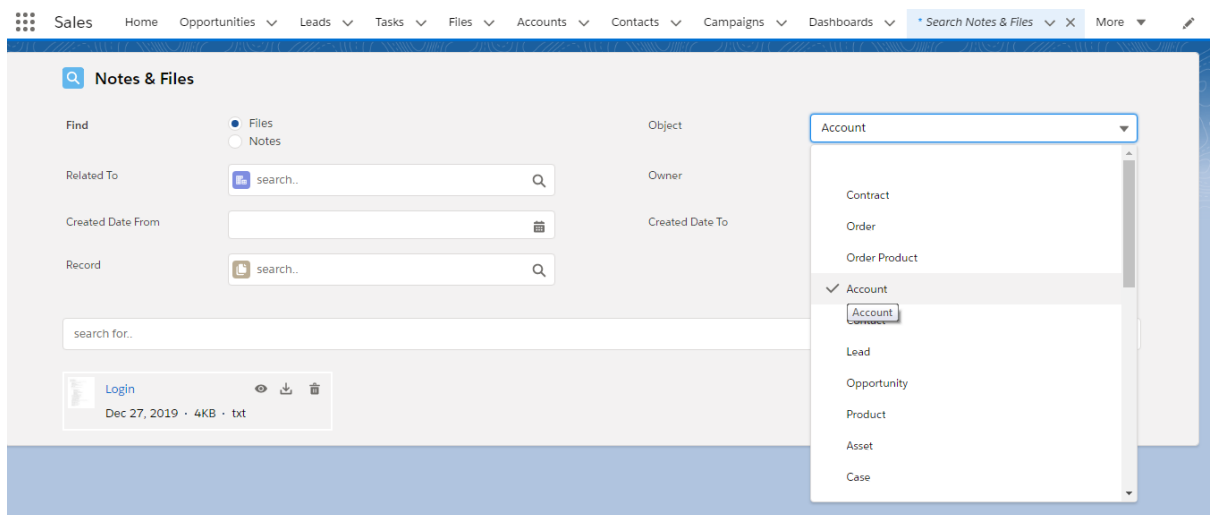
15. Clicking on **Delete** icon will ask user for confirmation to delete Note. If user click on **Ok** then Note will be deleted from Salesforce org.



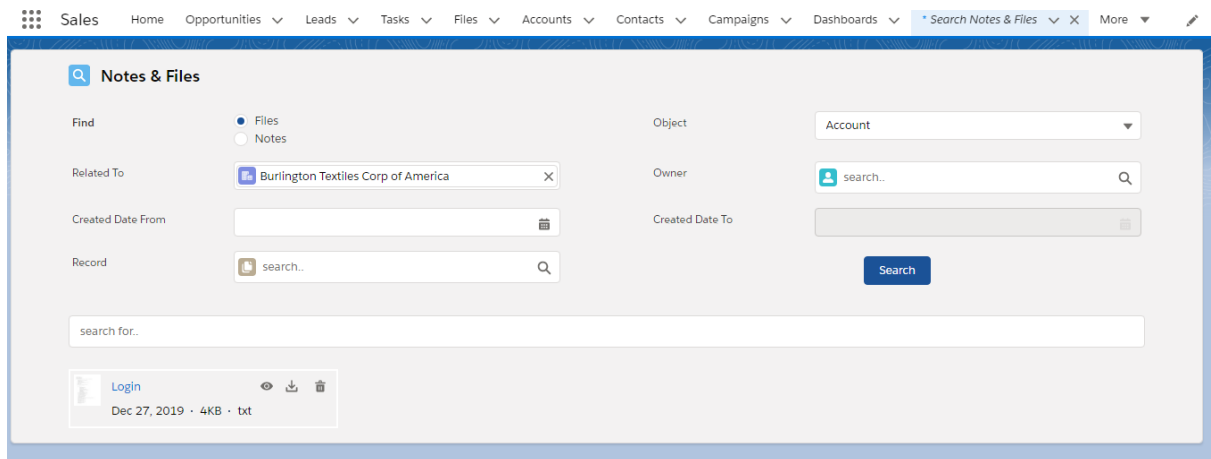
16. The Files or Notes result can be filtered by there name when the user type name in **search** for placeholder.



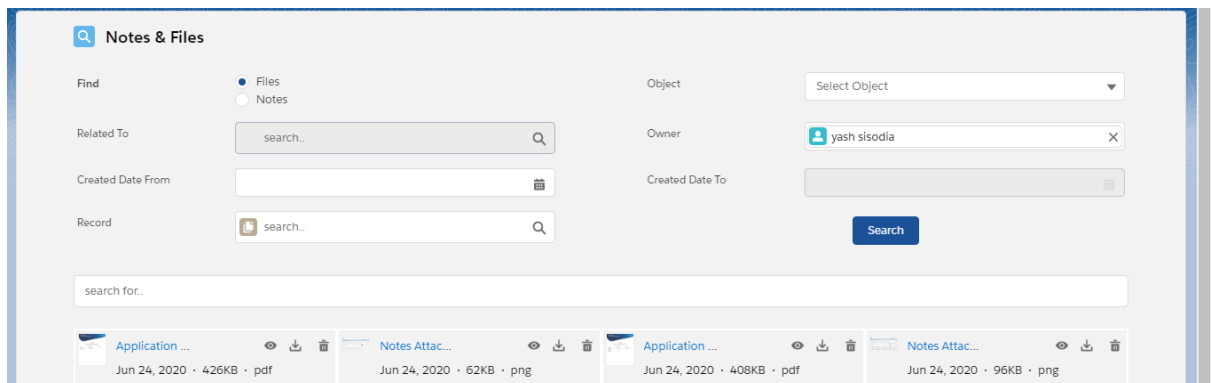
17. You can search for files or notes related to specific object by clicking on **Object** and then selecting the object name available from the dropdown list.



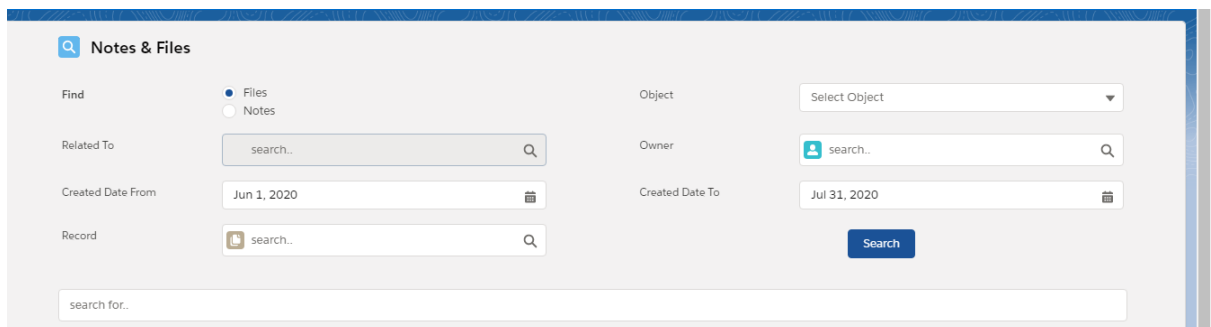
18. You can also select a specific record of the object from **Related To** dropdown list which will be available only if Object is selected.



19. You can search for files or notes related to specific owner by clicking on **Owner** and then selecting the the owner name available from the dropdown list.



20. You can search for files or notes which were created between specific dates by entering **Created Date From** and **Created Date To**.



21. You can search for specific files or notes by searching in Record and then selecting the record name available.

The screenshot shows a search interface titled "Notes & Files". It features several search filters and a main search bar. The filters include:

- Find:** Radio buttons for "Files" (selected) and "Notes".
- Related To:** A search input field with a magnifying glass icon.
- Created Date From:** A date selection input field with a calendar icon.
- Created Date To:** A date selection input field with a calendar icon.
- Record:** A dropdown menu showing "Login" with a close icon (X).
- Object:** A dropdown menu with "Select Object" and a downward arrow.
- Owner:** A search input field with a person icon and a magnifying glass icon.
- Search:** A blue button labeled "Search".

At the bottom, there is a large search input field labeled "search for..".