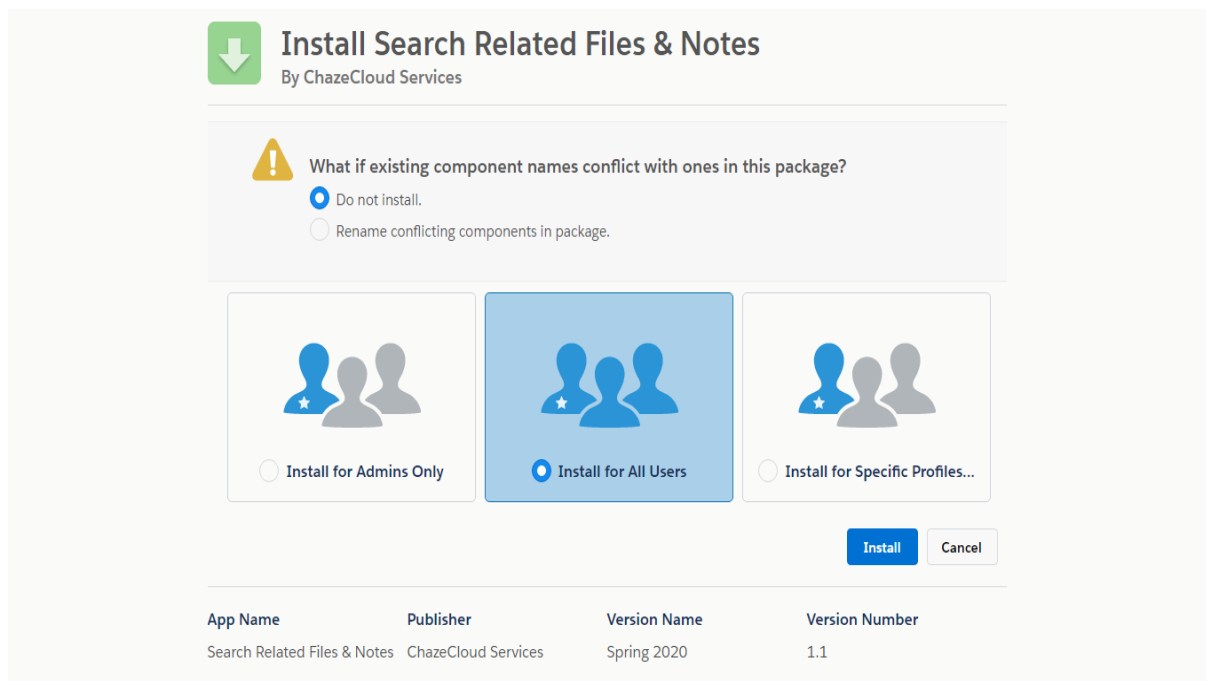
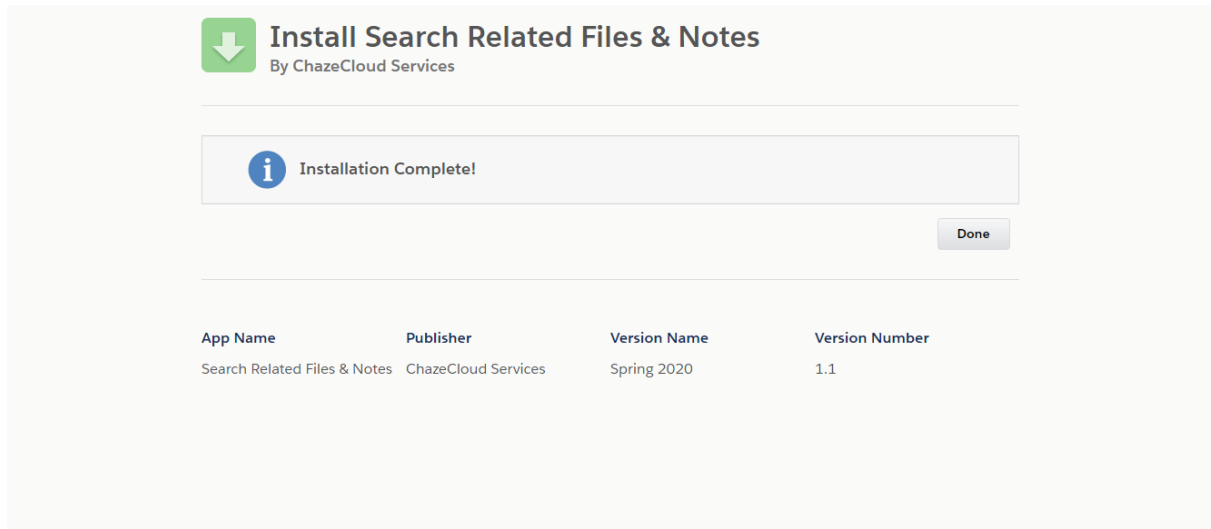


Installation and Setup

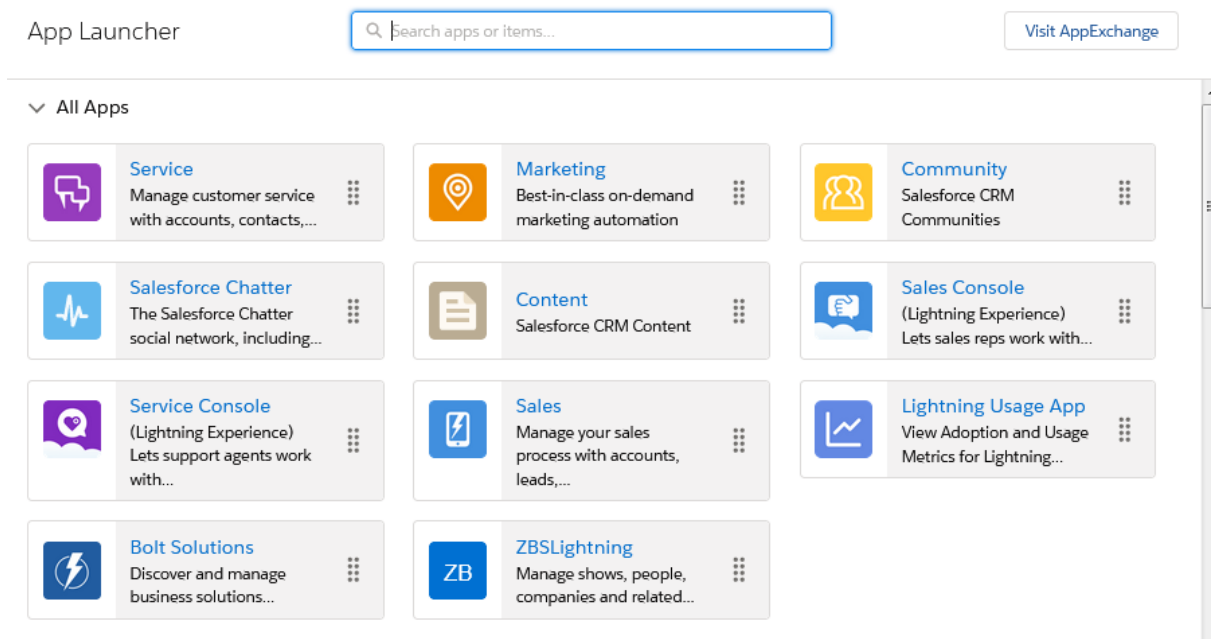
1. After purchasing the app on forceXchange you will be able to see two buttons “Install in Sandbox” and “Install in Production”. You can choose either of these two options. If you want to test this app first before using it in production environment, install it in Sandbox.
2. Go through the following 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.



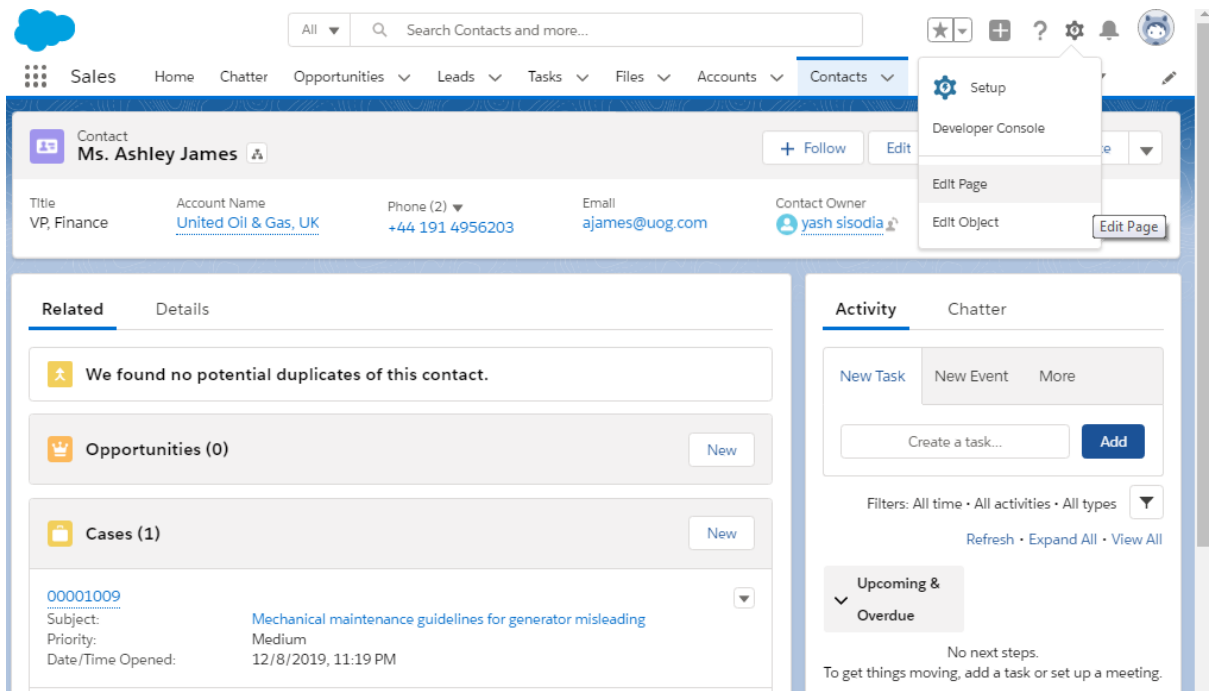
- Wait until the Installation complete screen appears. Click the **Done** button.



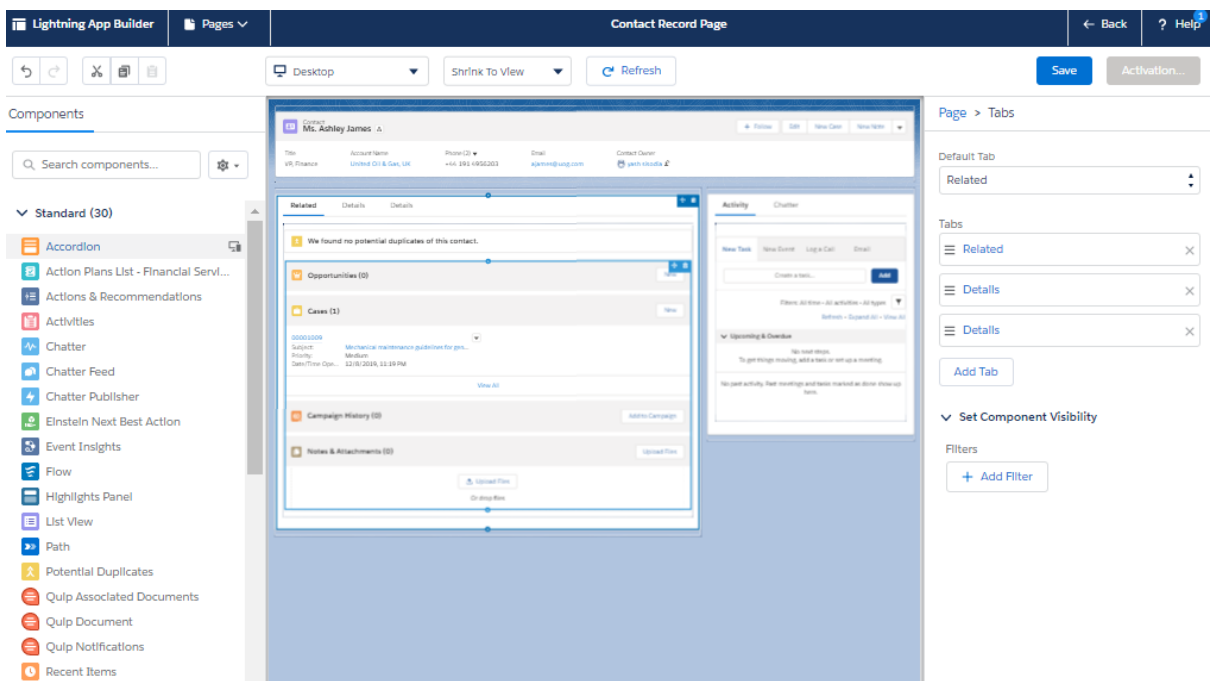
- From Salesforce Lightning Experience App Launcher, select the **Sales App** to setup the app.



- Now click on **Contact** Tab and then click on any record. After record is open click on Setup icon and then click on Edit Page.



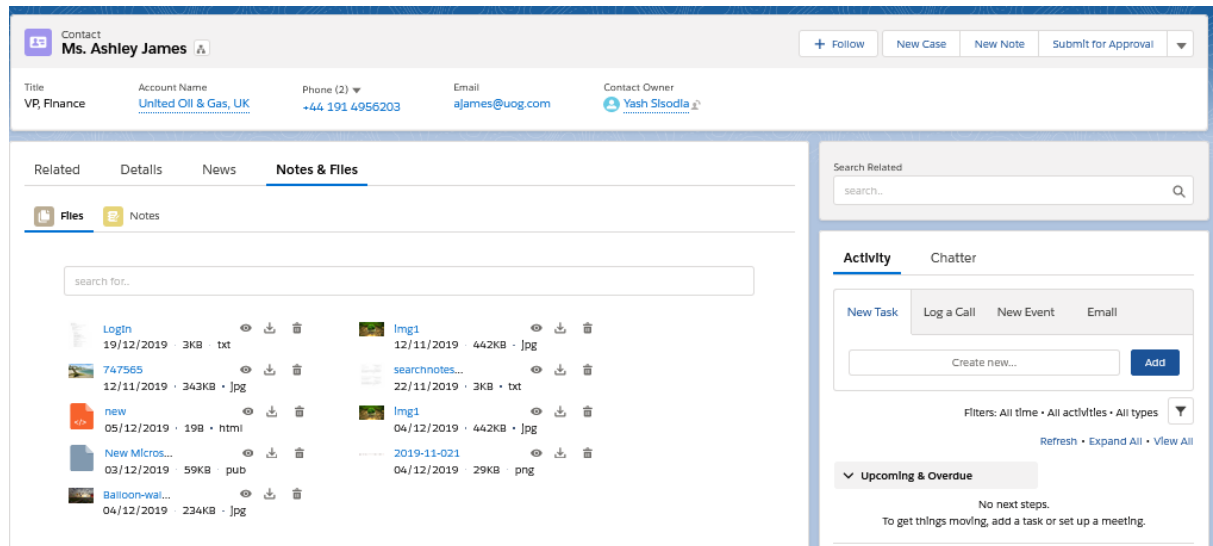
- On Contact record page click on related or detail tab. On the right side click on **Add Tab** button, after this new tab will be created with **Details** name.



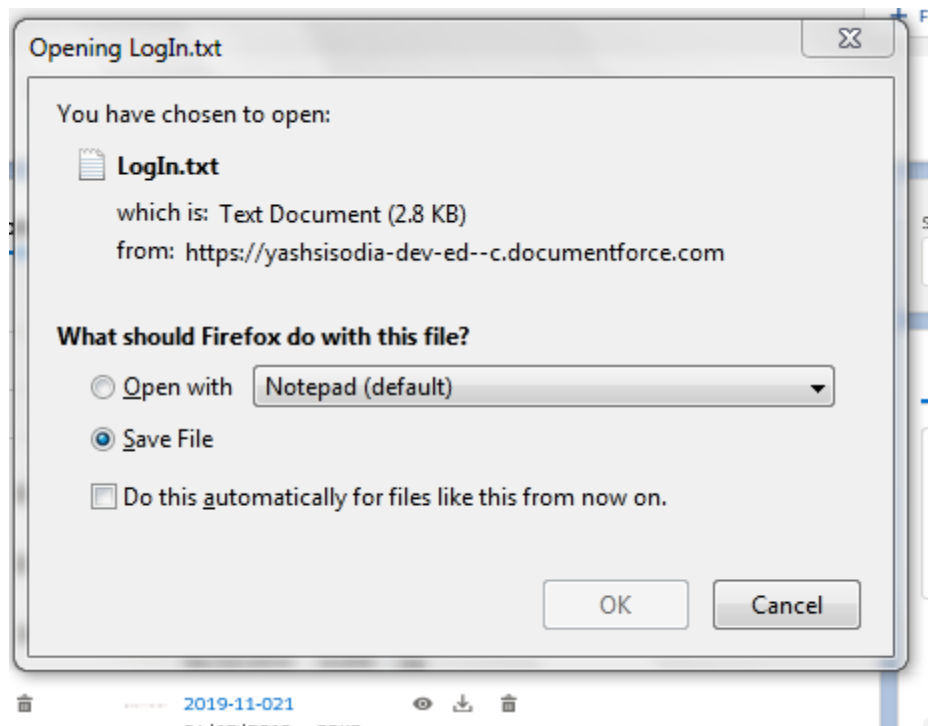
- Click on details showing at the end of **Tabs** list, then from **Tab label** select **Custom**. A custom label text will appear type **Notes & Files** in custom label and click **Done**.

- From left side in Components panel select and drag **RelatedNotesandFile** from **Custom** components and drop it on the Notes & Files tab. Click the **Save** button to save the page layout changes. Click the **Activation** button to deploy these changes to your org.

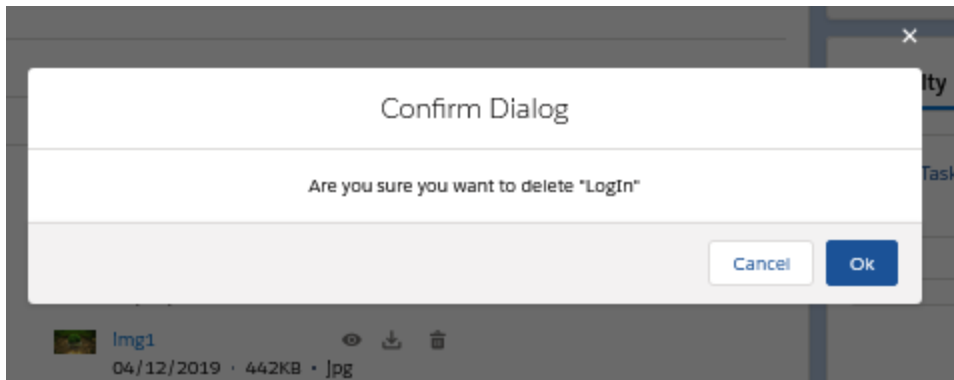
12. Congratulation you have successfully intalled the app on your Salesforce Org. By following step 7 – 11 you can add the component to any custom or standard object.
13. When you open **Notes & Files** tab the default Files tab will be selected and and showing every Files details in a box in which it will show Filename, CreatedDate, Filesize, File Extension, Eye icon, Download icon, and Delete icon. Clicking on **Eye** icon will open the File.



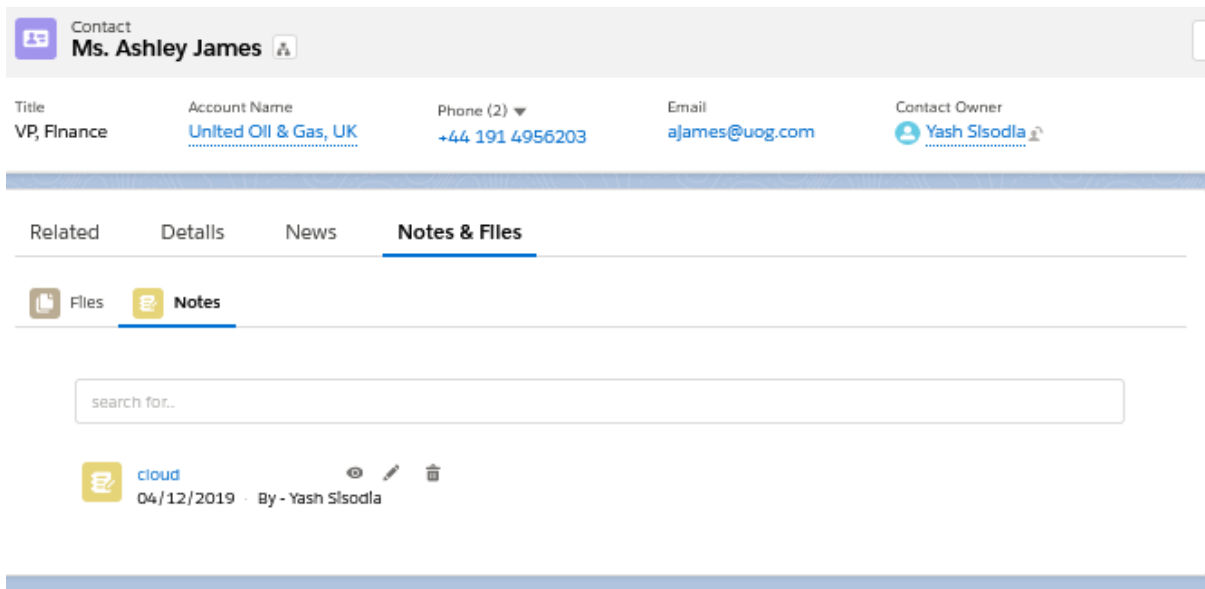
14. Clicking on **Download** icon will ask user to save file.



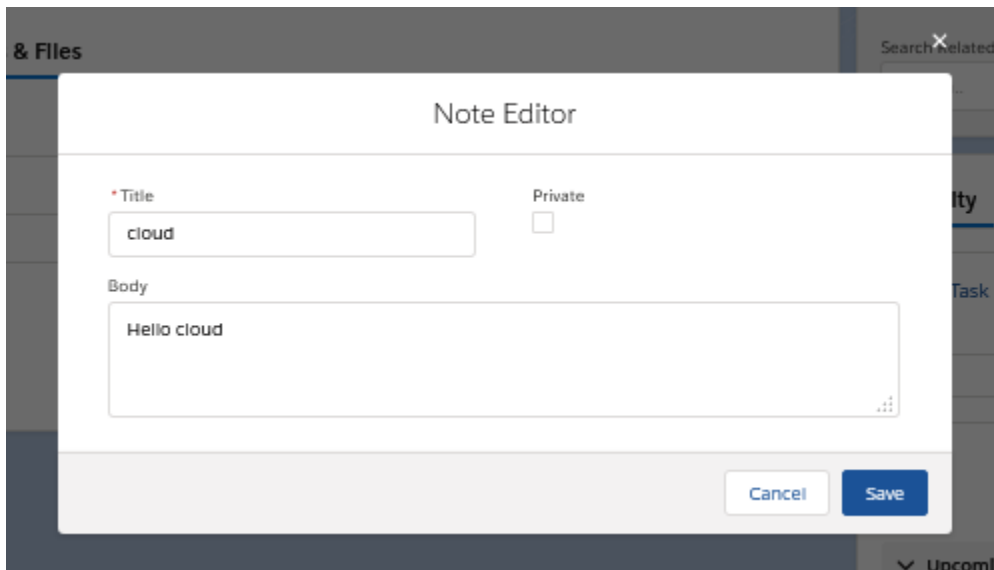
15. Clicking on **Delete** icon will ask user for confirmation to delete File. If user click on **Ok** then File will be deleted from Salesforce org.



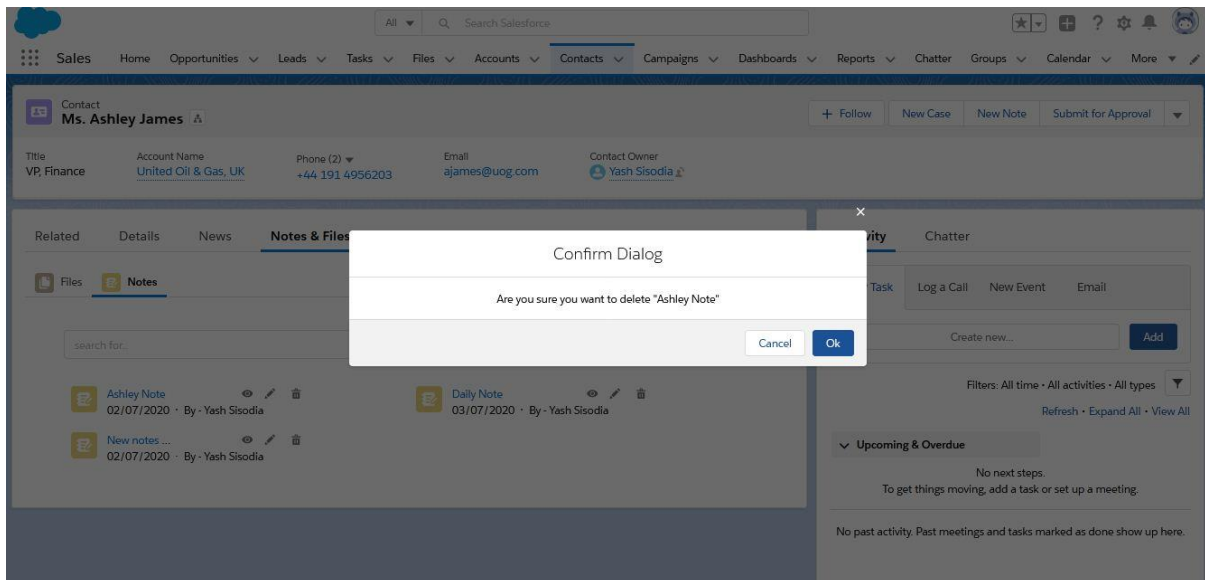
16. When you select **Notes** tab every notes will be shown in a box in which it will show Notetitle, CreatedDate, Owner, Eye icon, Edit icon, and Delete icon. Clicking on **Eye** icon will open the Note.



17. Clicking on **Edit** icon will allow user to edit note.





18. 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.




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

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