



# CARTULARIUS

DOCUMENT MANAGEMENT

Getting Started with Cartularius for Users

# Getting Started with Cartularius for Users

Cartularius Version 3.48

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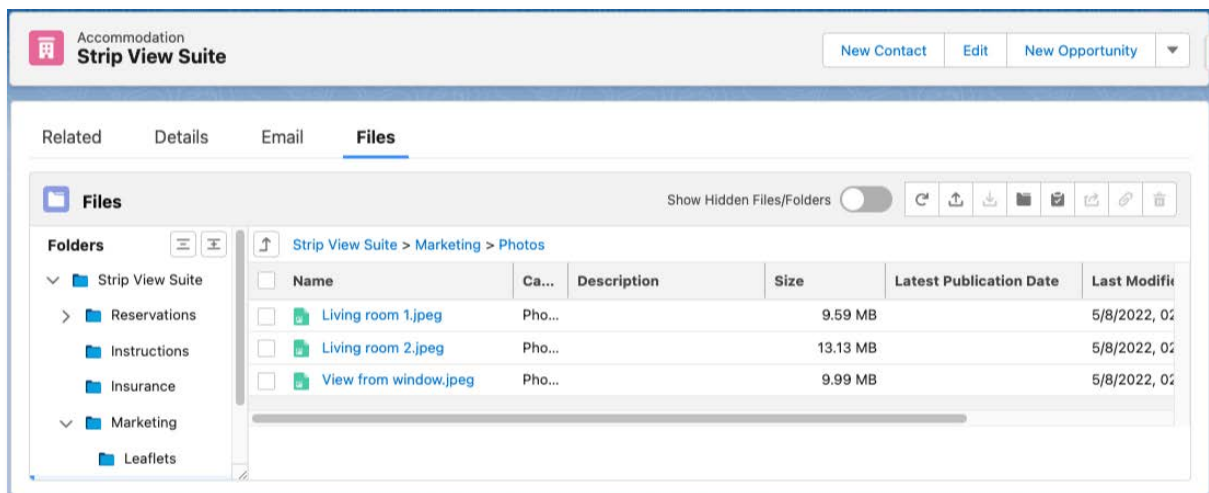
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## Chapter 1: Introduction

Welcome to the *Getting Started with Cartularius for Users* guide. This guide is designed to provide users with documentation on performing everyday tasks within Cartularius.

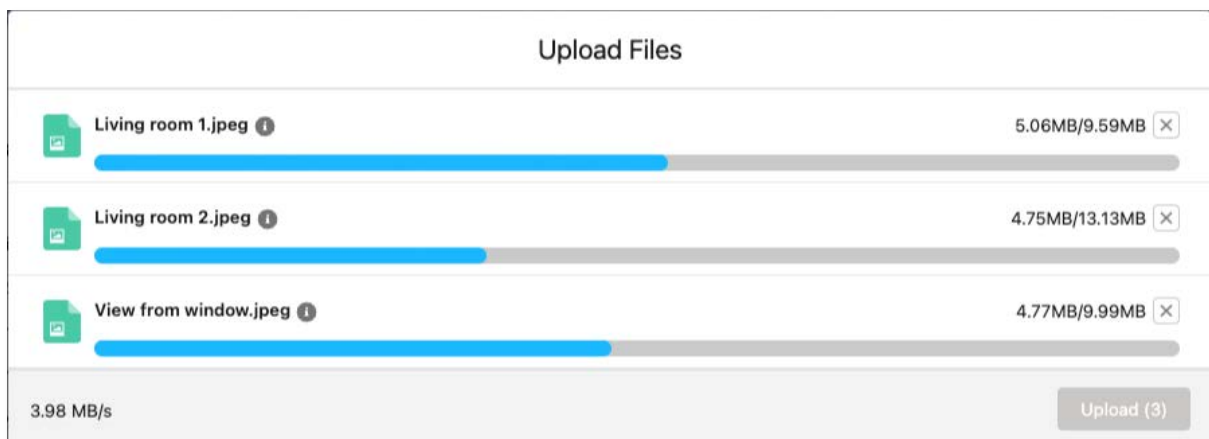
### What is Cartularius?

Cartularius (CDM) is an app that can be installed from the Salesforce AppExchange as an add-on to your existing Salesforce organization. CDM is a document management solution that relates Salesforce records to an advanced folder hierarchy. It is cost-effective and allows you to securely store gigabytes of files, making them directly available from your Salesforce records.



The screenshot shows the Cartularius interface for an 'Accommodation' record titled 'Strip View Suite'. The 'Files' tab is active, displaying a folder hierarchy on the left and a table of files on the right. The folder structure includes 'Strip View Suite', 'Reservations', 'Instructions', 'Insurance', 'Marketing', and 'Leaflets'. The file table lists three files: 'Living room 1.jpeg' (9.59 MB), 'Living room 2.jpeg' (13.13 MB), and 'View from window.jpeg' (9.99 MB). All files have a 'Latest Publication Date' of 5/8/2022, 02:00:00.

Name	Ca...	Description	Size	Latest Publication Date	Last Modifi
Living room 1.jpeg		Pho...	9.59 MB	5/8/2022, 02:00:00	
Living room 2.jpeg		Pho...	13.13 MB	5/8/2022, 02:00:00	
View from window.jpeg		Pho...	9.99 MB	5/8/2022, 02:00:00	



The screenshot shows the 'Upload Files' interface. Three files are being uploaded, each with a progress bar and a status indicator. The files are 'Living room 1.jpeg' (5.06MB/9.59MB), 'Living room 2.jpeg' (4.75MB/13.13MB), and 'View from window.jpeg' (4.77MB/9.99MB). The upload speed is 3.98 MB/s, and there is an 'Upload (3)' button at the bottom right.

File Name	Current Size	Total Size
Living room 1.jpeg	5.06MB	9.59MB
Living room 2.jpeg	4.75MB	13.13MB
View from window.jpeg	4.77MB	9.99MB

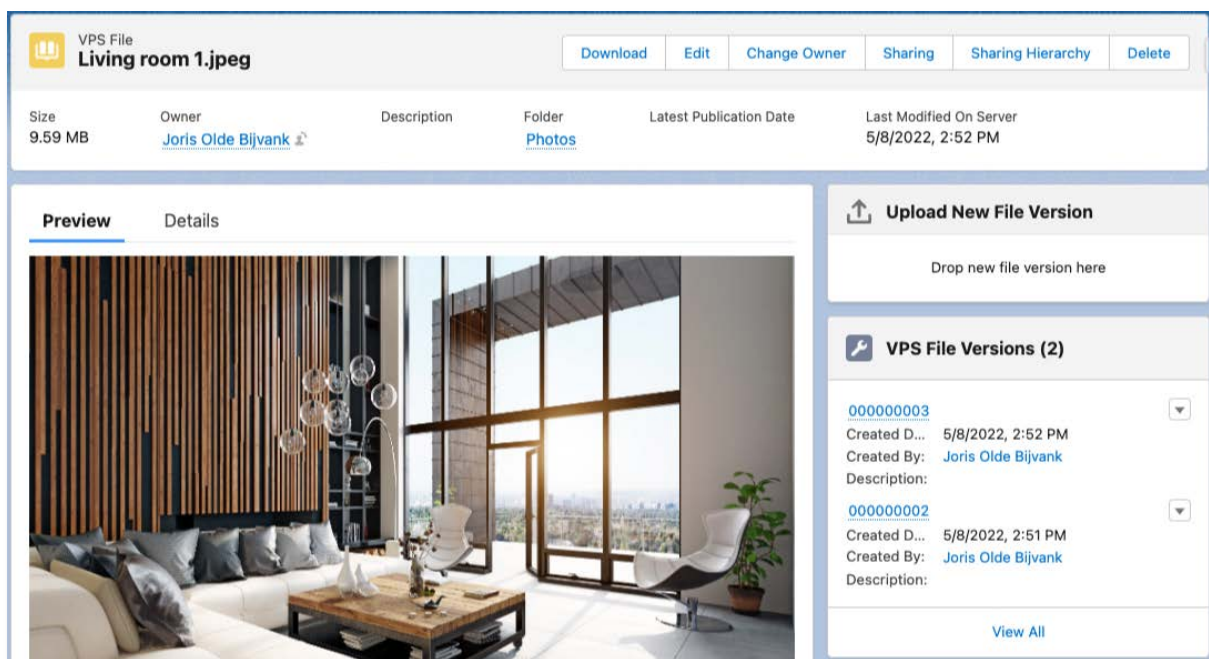
## Scope of this document

This document is designed as a getting-started guide that covers the most common topics for working with CDM from scratch. While it goes into detail on a vast number of topics, it is not designed as an all-inclusive reference manual.

It is worth pointing out that CDM is a highly customizable package, meaning that the end product employed at an organization could look different from the examples provided in this user guide. This difference could, in turn, be attributed to various organizational settings. It is advisable to consult with the company's Salesforce admin whenever anything is unclear.

This document explains how to get started using the software. To learn how to perform administrative tasks for CDM, please read the *Getting Started with Cartularius for Admins* guide.

We highly appreciate any suggestions you might have regarding CDM, as they will contribute to the continuous improvement of our software.



The screenshot displays a file management interface for a VPS File named "Living room 1.jpeg". The file is 9.59 MB in size, owned by Joris Olde Bijvank, and is located in the "Photos" folder. It was last published on 5/8/2022 at 2:52 PM. The interface includes a preview of the image, which shows a modern living room with a white sofa, a wooden coffee table, and large windows overlooking a city. To the right of the preview, there is an "Upload New File Version" section with a "Drop new file version here" prompt. Below that, a "VPS File Versions (2)" section lists two versions of the file, both created by Joris Olde Bijvank on 5/8/2022. The first version (ID: 000000003) was created at 2:52 PM, and the second version (ID: 000000002) was created at 2:51 PM. A "View All" link is provided at the bottom of the version list.

Size	Owner	Description	Folder	Latest Publication Date	Last Modified On Server
9.59 MB	Joris Olde Bijvank		Photos		5/8/2022, 2:52 PM

Version ID	Created D...	Created By:	Description:
000000003	5/8/2022, 2:52 PM	Joris Olde Bijvank	
000000002	5/8/2022, 2:51 PM	Joris Olde Bijvank	

## Chapter 2: Files and Folders Component

### Description

In this chapter, we will introduce you to the fundamentals of the Files and Folders component and provide you with the knowledge to work effectively and efficiently.

The Files and Folders component is the main element of CDM, where you are likely to spend most of your time using the application.

Where can I find the Files and Folders component?

Without going into details too much, the Files and Folders component is used in two so-called placeholder components: the File Library and the Related Files and Folders component.

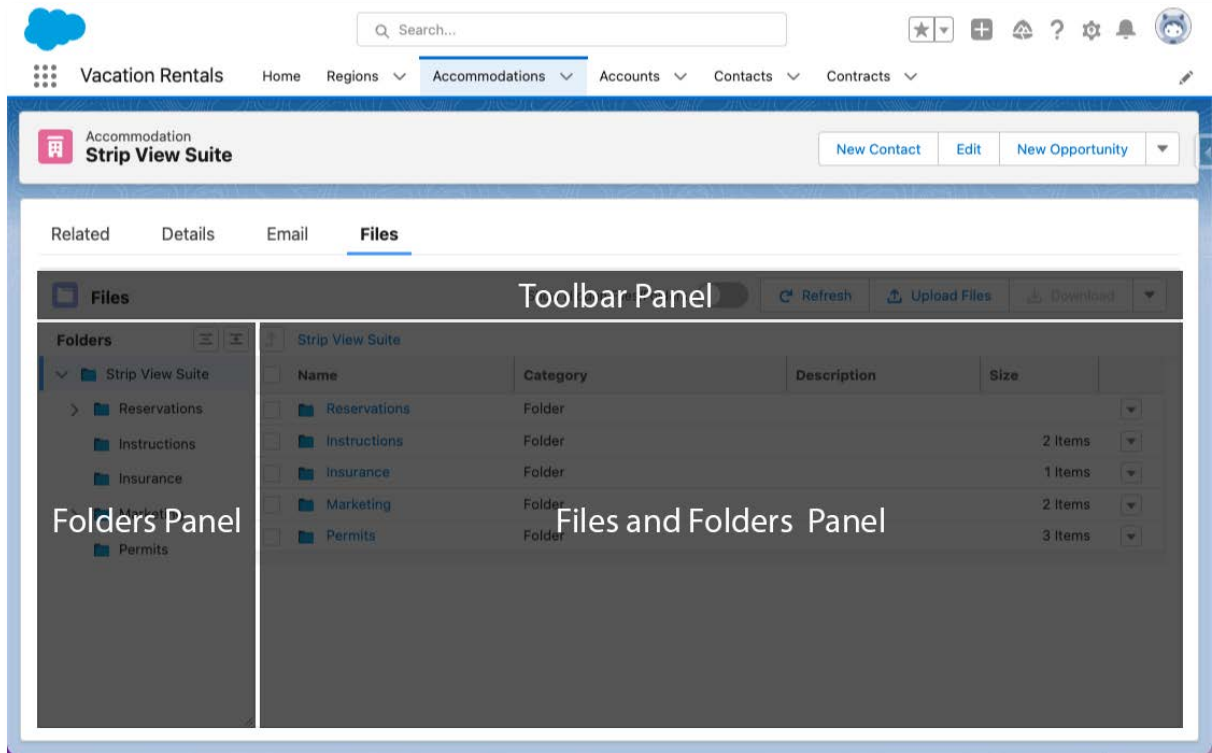
The File Library shows the whole hierarchy of folders from the root element. By default, this component is only available to admins. While you can view all files and folders that you have access to from this component, it is too cumbersome to use for daily work.

We created the Related Files and Folders component for daily work. The Salesforce admin can install this component on any Lightning Record Page.

**Note:** A Lightning Record Page is a page you will see when you open a Salesforce record. These records can be standard, such as accounts, contacts, leads, etc, or custom, specific to your company's custom app or organization.

## User Interface

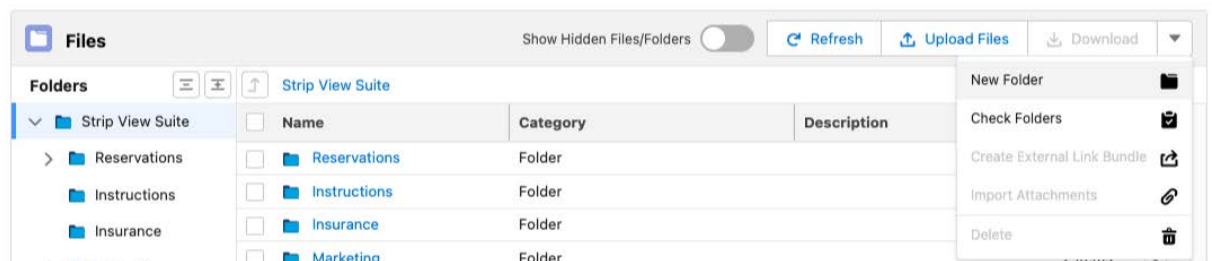
The following paragraphs will discuss in detail the user interface elements of this component, such as the panels and user actions.



### Toolbar panel

The toolbar panel is the first element of the Files and Folders component we will discuss. It is located in the upper part of the component and provides a variety of functions, which will be explained in the upcoming sections.

**Note:** The Salesforce admin can change the button style to show the label and icon or only one. While it is recommended to show both labels and icons, in situations where there is little space available, it is best to choose “Icon Only.”



### *Show Hidden Files/Folders toggle*

Switching the **Show Hidden Files/Folders** toggle to the “on” position will show all files and folders that were previously marked hidden until the toggle is switched to the “off” position.

**Note:** Showing and hiding files and folders is a great way to keep folders clutter-free without deleting obsolete data.

### *Refresh button*

The **Refresh** button refreshes the contents of the folders and the files and folders panel.

**Note:** In a multi-user environment, another user may upload a file in the folder you are currently viewing. To make this file available, you need to click the **Refresh** button.

### *Upload Files button*

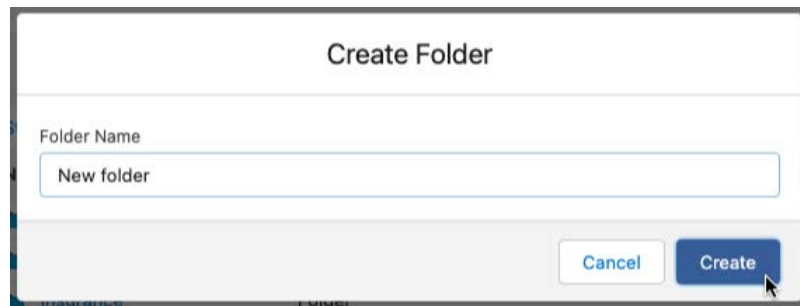
Files can be uploaded by clicking the Upload Files button or using drag-and-drop. When clicking the **Upload Files** button, a file selection dialog will appear. The Upload Files modal will appear after selecting the files and clicking the **Open** button. The functionality of the Upload Files modal will be explained later in this guide.

### *Download button*

The **Download** button downloads one or more files to your local computer. It is grayed out by default but becomes available upon selecting one or more files and/or folders in the Files and Folders panel.

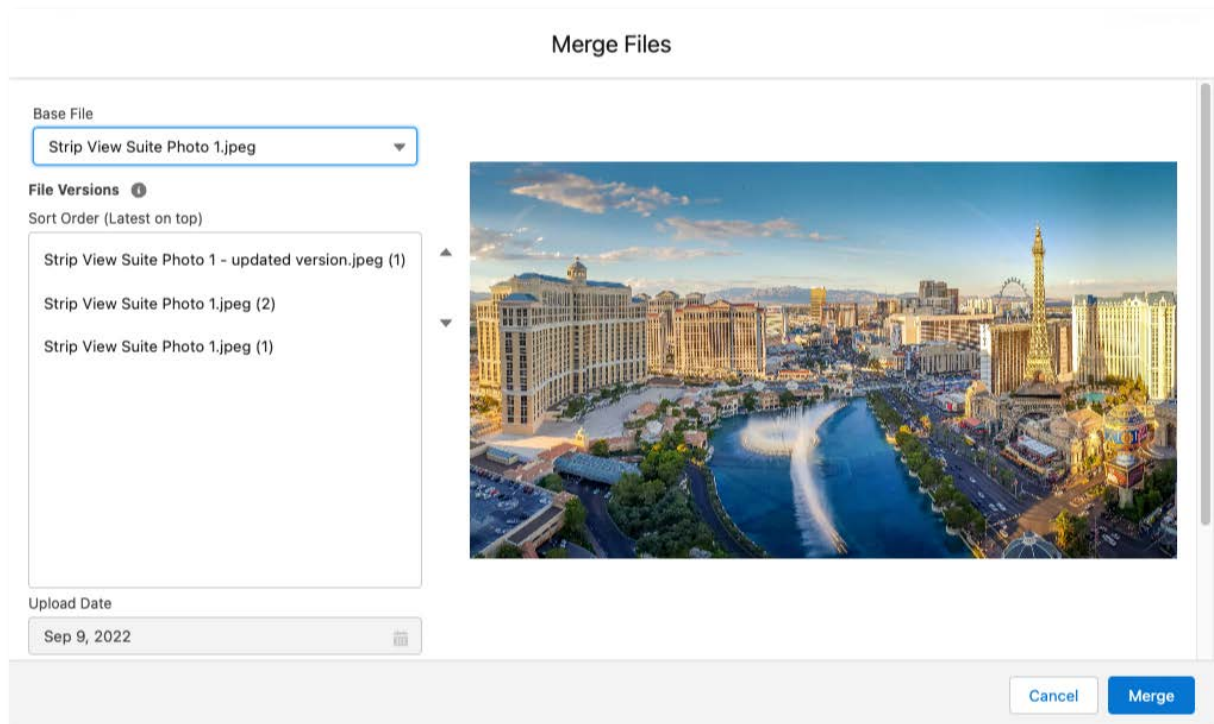
### *New Folder button*

The **New Folder** button lets you create a new folder in the selected folder. When setting up the folder hierarchy, the administrator can choose whether to allow this. If it is not allowed, the **New Folder** button will be greyed out.



### *Merge Files button*

When you have two file versions in a folder, you can merge these into one file using the **Merge Files** button. First, select one or more files and click the button to open the *Merge Files Modal*.



Select the *Base File*. This is the file that will be preserved, and all file versions will be added to it.

Change the order of the File Versions by selecting a version and clicking the arrow buttons next to the component.

Click the **Merge** button to perform the merge action.

**Note:** This feature can also be used to change the order of file versions in one file. You only need to select one file and click the Merge Files button to do this.

#### *Create External Link Bundle button*

When you click the Create External Link Bundle button, a window will pop up where you can create and activate an External Link Bundle. The chapter External Link Bundles provides more information on external link *bundles*.

#### *Import Attachments button*

The **Import Attachments** button becomes available when the Files and Folders component is related to a Salesforce record that has one or more emails with attachments.

The Import Attachments modal shares some similarities with the Upload Files modal, which will be explained in more detail in a later chapter of this guide.

To save Salesforce file storage, you can delete the attachments from the email messages after they are imported into CDM. The default state is to keep the original attachments.

#### *Delete button*

The **Delete** button is used to delete one or more files and/or folders stored in CDM.

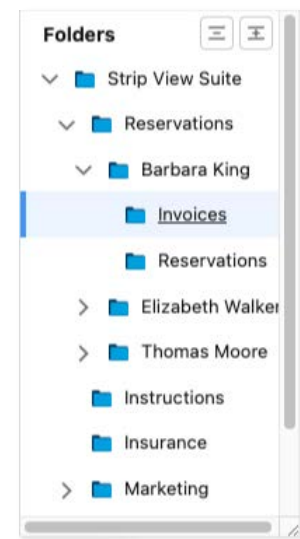
**Note:** The button is grayed out if no files or folders are selected in the files and folders panel.

## Folders panel

The folders panel is the second element of the Files and Folders component. It is located on the left side of the component and gives users an overview of folders related to the currently selected Salesforce record. The name of this record is also the name of the root folder of the hierarchy. Right beneath, there are subfolders, which can go multiple layers deep.

**Note:** The subfolders can be created manually using the **New Folder** button or automatically using the Auto Folder Creation process.

Clicking the arrow on the left side of a folder expands it to show the available subfolders. Clicking this arrow again collapses the folder. If no subfolders are available, the arrow is not present. As can be seen in the figure to the right, there are two buttons in the upper-right corner of the panel. These will be discussed next.



### *Collapse All button*

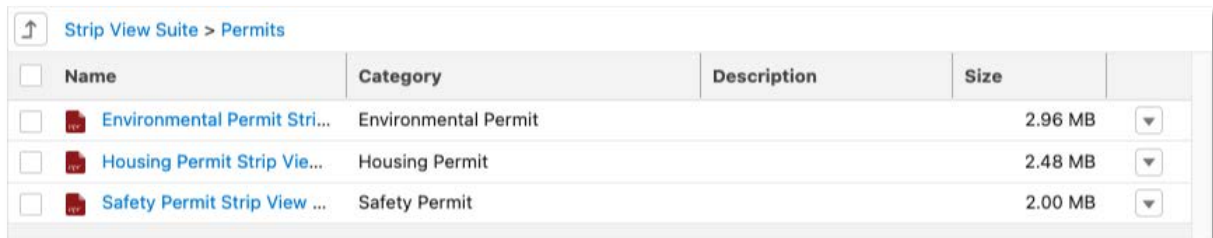
Clicking the **Collapse All** button will collapse all folders in the folders panel so that only the home folder is visible.

### *Expand All button*




Clicking the **Expand All** button will expand all folders and subfolders in the folders panel.

## Files and Folders panel

The Files and Folders panel takes center stage in the Files and Folders component. It shows all files and folders available in the currently selected folder for a specific Salesforce record. The panel is similar to a conventional file explorer and lets users interact with files and folders in various ways.



The screenshot shows a file explorer interface with a breadcrumb path 'Strip View Suite > Permits'. Below the path is a table with columns for Name, Category, Description, and Size. There are three rows of files, each with a checkbox for selection and a dropdown arrow on the right.

<input type="checkbox"/>	Name	Category	Description	Size	
<input type="checkbox"/>	 Environmental Permit Stri...	Environmental Permit		2.96 MB	▼
<input type="checkbox"/>	 Housing Permit Strip Vie...	Housing Permit		2.48 MB	▼
<input type="checkbox"/>	 Safety Permit Strip View ...	Safety Permit		2.00 MB	▼

### *Up button*

The **Up** button navigates one level up from the currently selected folder in the hierarchy.

**Note:** The button is greyed out if the record's home or root folder is currently selected.

### *Breadcrumbs*

The breadcrumbs element is like what you might see in the Windows or MacOS file explorer. It quickly indicates your current whereabouts in the folder hierarchy at any particular point. Each item of the folder path is clickable and redirects to the respective folder when clicked upon. Clicking the last item will open the related Salesforce record.

**Note:** Opening the related Salesforce record when clicking the last item of the breadcrumbs only works for direct folders.

### *Row selection*

On the left side of the files and folders data table, on every row, you will see row selection checkboxes and one in the table header. Click the row selection checkboxes to select rows one by one. Clicking on the checkbox in the table header selects every row in the folder. Clicking on the checkbox again removes the selection.

Clicking a group action on the toolbar panel with one or more rows selected will act on all selected items.

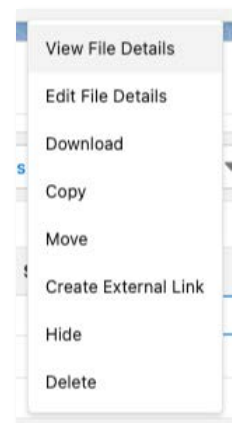
### Row actions

Individual row actions are available on the right side of each row by clicking on the button with the downward-pointing arrow. The actions available for files and folders differ, as will be discussed in the following sections.

#### Row actions for files

##### View File Details

Clicking the *View File Details* row action will open the lightning record page of the respective file. The chapter *File Lightning Record Page* provides more details on this page.



##### Edit File Details

Filename  
Environmental Permit Strip View Suite.pdf

Description

Category  
Environmental Permit

Cancel Save

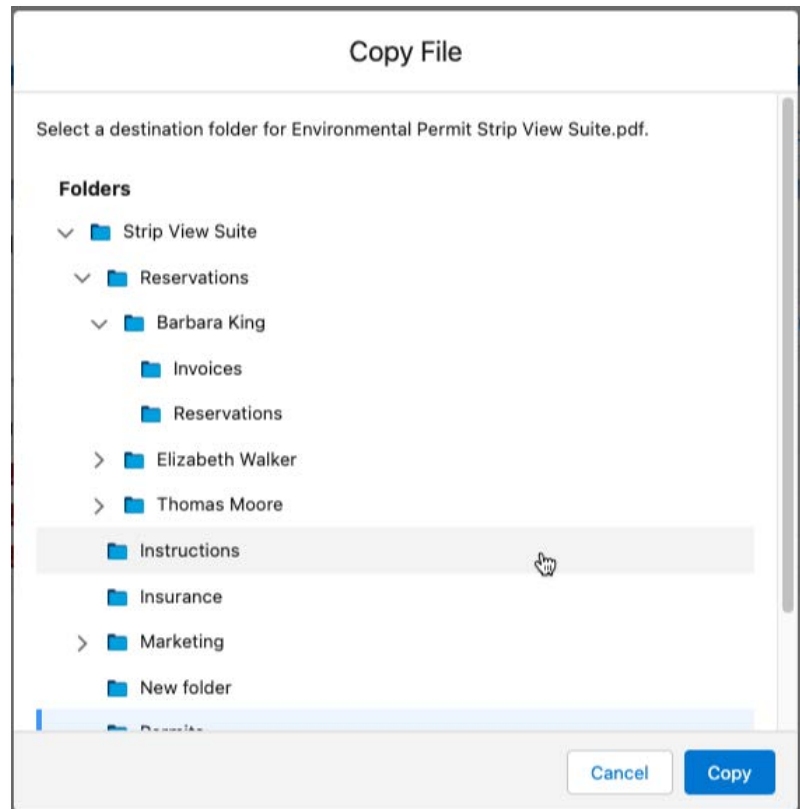
Upon selecting this row action, a new pop-up window opens where you can edit the filename, the description, and the category of a file.

##### Download

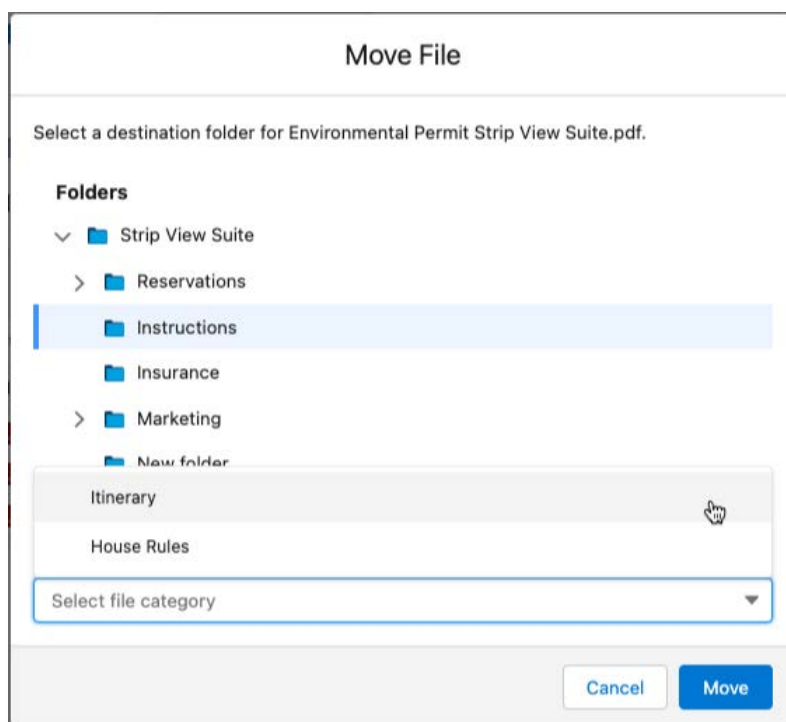
Clicking the *Download* row action will download the selected file.

## Copy

Selecting this row action opens a pop-up window where you can choose a destination folder. Click the **Copy** button to copy the selected file to the destination folder.



## Move



The *Move* row action opens a pop-up window, like the *Copy* row action. After choosing the destination folder and clicking the **Move** button, the file will be moved to its destination instead of copied. The file is deleted from its source location.

### Create External Link

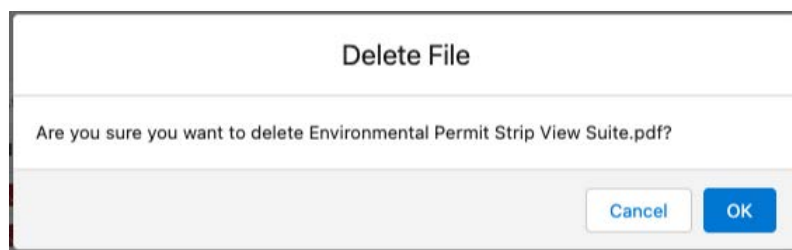
When clicking **Create External Link**, a window will pop up, letting you create and activate an External Link Bundle. The chapter *External Link Bundles* provides more information on these *bundles*.

### Hide

This row action hides the selected file.

### Delete

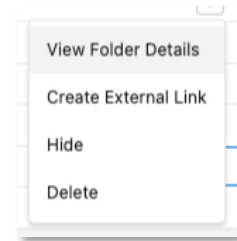
Clicking the *Delete* row action will show a confirmation dialog. Click the **OK** button to confirm the deletion. If there are no security issues, the selected file will be deleted.



## Row actions for folders

### View Folder Details

Clicking the *View Folder Details* row action will open the lightning record page of the respective folder. The chapter *Folder Lightning Record Page* provides more details on this *page*.



### Download

The *Download* row action will download all files within the selected folder and its subfolders.

### Create External Link

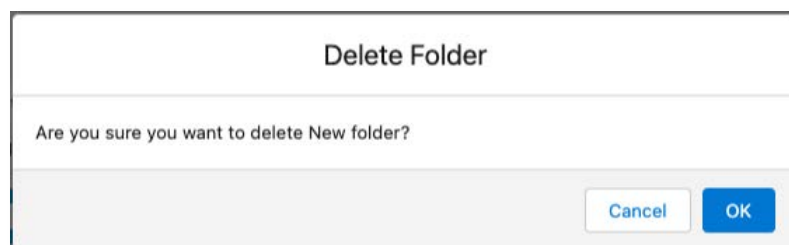
When clicking Create External Link, a window will pop up, letting you create and activate an External Link Bundle. The chapter *External Link Bundles* provides more information on these *bundles*.

### Hide

This row action hides the selected folder.

### Delete

Clicking the *Delete* row action will show a confirmation dialog. Click the **OK** button to confirm the deletion. If no security issues are found, the selected folder and its contents will be deleted.



## Common Tasks

In this section, we guide you through some everyday tasks that can be performed in the Files and Folders component.

### Upload files

#### *Initiate the upload*

There are several ways you can upload files to CDM.

#### Upload Files button

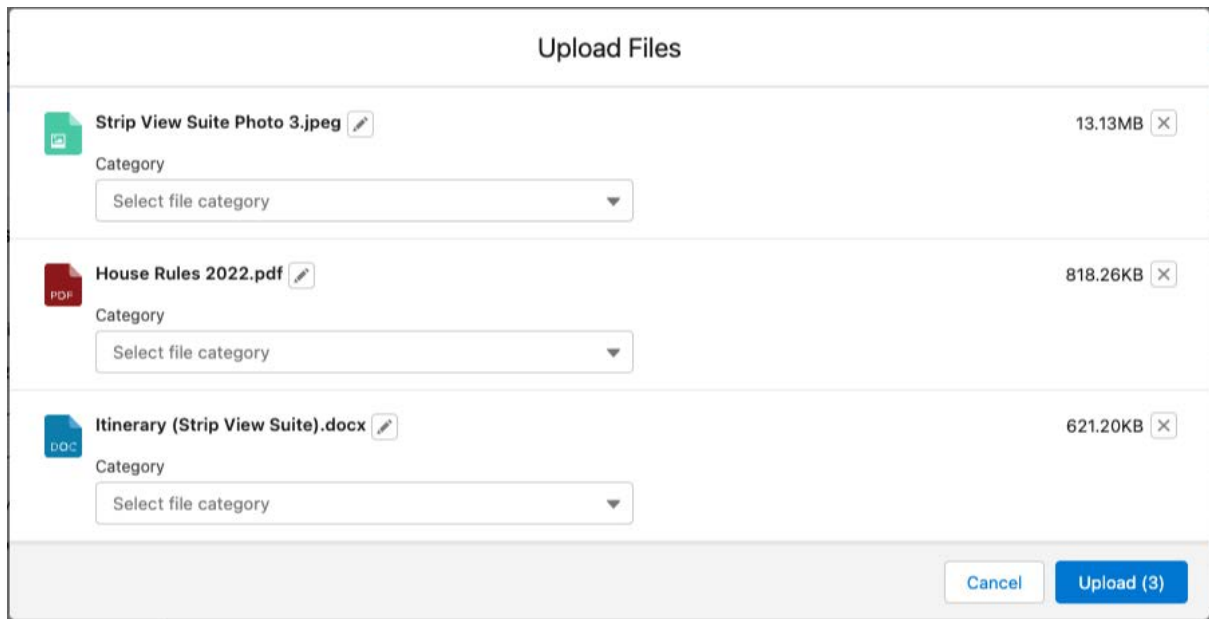
Clicking the **Upload Files** button opens the file explorer dialog of the operating system. In this dialog, one or more files can be selected to upload to the currently selected folder. When clicking the Open button, the Upload Files modal pops up, as seen in the image on the next page. Here, you can perform a number of actions with the selected file(s) prior to uploading.

#### Drag-and-drop

Another method of uploading files is to use drag-and-drop. You can select one or more files from your operating system file explorer and drag them into the Files and Folders component to trigger the Upload Files modal and upload the files into the selected folder.

**Note:** This method allows you to upload files only. You cannot drop a folder into the Files and Folders component.

### Upload Files modal



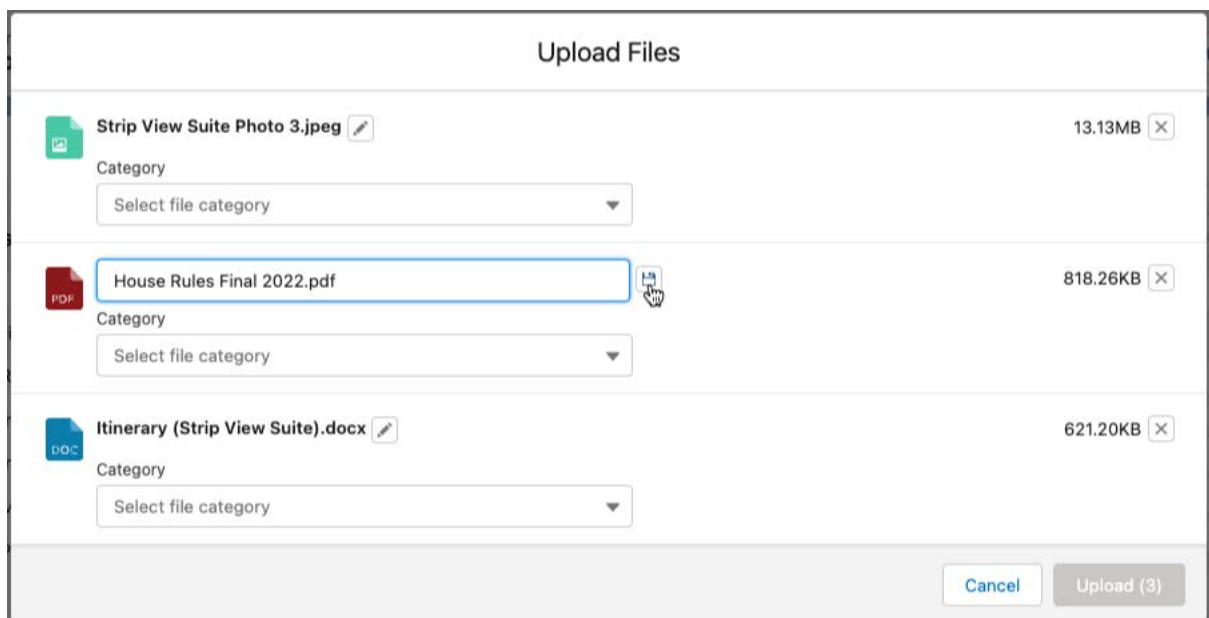
The screenshot shows the 'Upload Files' modal with three files listed:

File Name	Size
Strip View Suite Photo 3.jpeg	13.13MB
House Rules 2022.pdf	818.26KB
Itinerary (Strip View Suite).docx	621.20KB

Each file entry includes a category dropdown menu with the text 'Select file category'. At the bottom right, there are two buttons: 'Cancel' and 'Upload (3)'.

### Edit the filename

Before uploading the files, you can change their names from within the Upload Files modal. To do this, you should click the button with the edit icon next to the filename. The edit icon has been changed to a save icon. Click this button to save the changes you have made.



The screenshot shows the 'Upload Files' modal with the same three files. The filename 'House Rules 2022.pdf' has been changed to 'House Rules Final 2022.pdf'. The edit icon next to the filename is now a save icon. The 'Upload (3)' button is now greyed out. At the bottom right, there are two buttons: 'Cancel' and 'Upload (3)'.

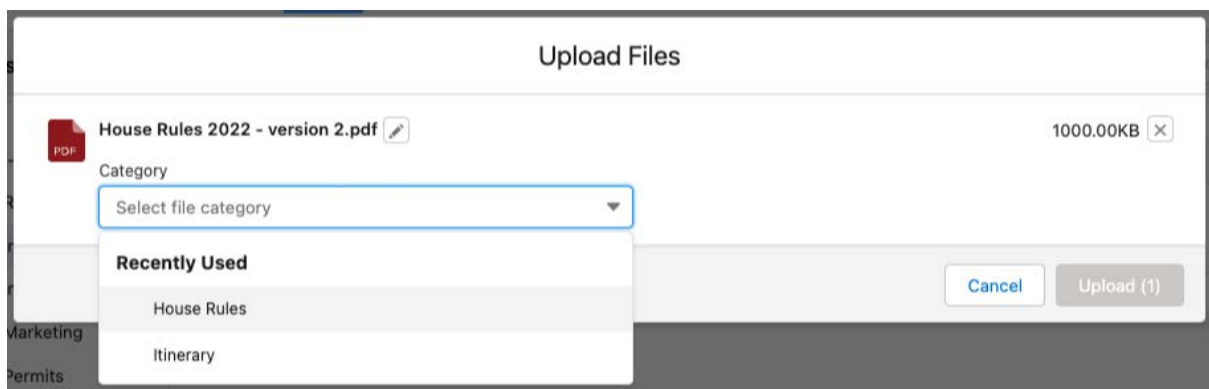
**Note:** If the **Upload** button is greyed out, one of the filename-edit controls may still be activated. Click any visible **Save** button to continue.

### Selecting a file category

It is also possible to provide a category for the uploaded files, which will help organize them. File categories are pre-defined by the Salesforce admin. For each folder, the Salesforce admin can define whether a file category is required. Choose a file category by clicking the dropdown and selecting the most relevant category. The Upload button is greyed out when a file category is required and none is specified.

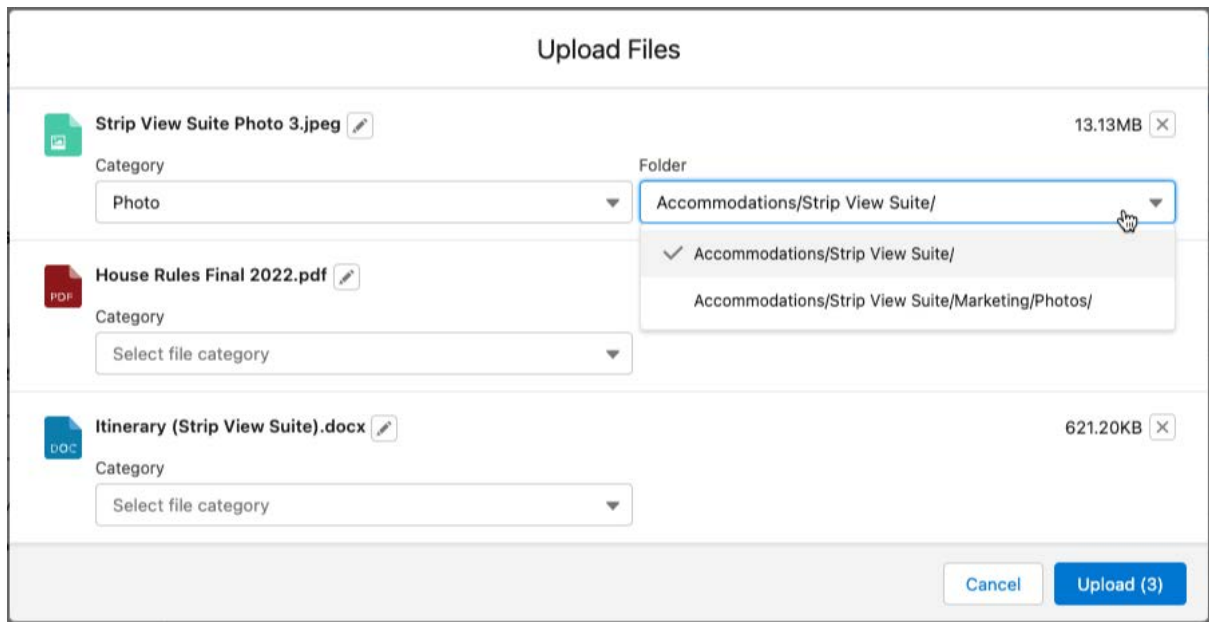
The dropdown component will show the recently used file categories for easy selection.

**Note:** Please let your Salesforce admin know if you need help finding the correct file category.



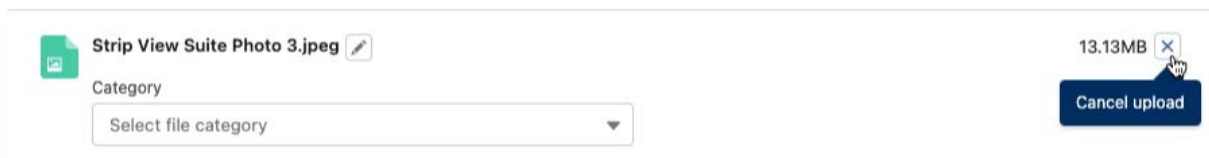
### Selecting a (sub)folder

Based on the file category selection and the pre-defined file category restrictions made by the Salesforce admin, the system suggests a folder to store the file. If there are more possibilities, you can click the dropdown and select the most relevant location to store the file.



### Cancel the upload

You can cancel the upload of a single file by clicking the button icon on the right side of the row.



To cancel the complete upload, you can click the **Cancel** button.



## Import Attachments

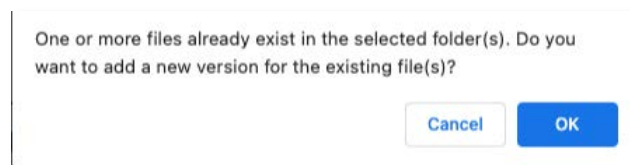
It is possible to import email messages into Salesforce. By default, any related attachments will be stored as ContentVersion records, which can take up considerable storage space.

When importing these attachments into CDM, the attached files can be placed in a sensible location and enriched with metadata while saving Salesforce storage space.

## Upload a new file version

In CDM, multiple versions of a single file can be used. If this is enabled by the Salesforce admin, you can upload a new file version the same way as the initial upload. This is done by clicking the **Upload Files** button or by using drag-and-drop.

The system always asks for confirmation when uploading a new file version.



## Delete files

Deleting files from within the Files and Folders component can be done in several ways.

One way to do this is to click the row selection boxes corresponding to each file and press the **Delete** button in the Toolbar panel. This allows you to delete one or more files.

It is also possible to delete files using row actions by selecting the delete action from the row actions dropdown for the specified file. This method allows you to delete a single file only.

## Preview a file

CDM makes use of various techniques to preview a file from within Salesforce without the need to download the file.

To open this preview, go to the folder that contains the file you want to preview and click its name in the files and folders panel. This will open the File Lightning Record Page, which will be discussed in more detail in the next chapter.



<input type="checkbox"/>	Name	Category	Description	Size	
<input type="checkbox"/>	 Strip View Suite Photo 1.j...	Photo		9.99 MB	▼
<input type="checkbox"/>	 Strip View Suite Photo 2.j...	Photo		9.59 MB	▼
<input type="checkbox"/>	 Strip View Suite Photo 3.j...	Photo		13.13 MB	▼

## Chapter 3: File Lightning Record Page

### Description

The File Lightning Record Page shows all information related to a single file stored in CDM. If the file is of a type that CDM can handle, the default tab in the main region of the page shows a preview of it.

The screenshot displays the File Lightning Record Page for a file named "Reservation Thomas Moore.xlsx". The page is organized into several sections:

- Header:** Includes a search bar, navigation menu (Vacation Rentals, Home, Regions, Accommodations, Accounts, Contacts), and a breadcrumb trail for "Reservation Thomas Moore...".
- File Information:** Shows the file name "Reservation Thomas Moore.xlsx" with actions: Download, Edit, Change Owner, Sharing, Sharing Hierarchy, and Delete. Metadata includes Size (570.77 KB), Owner (Nick Nesterov), Description (Reservations), Latest Publication Date, and Last Modified On Server (5/13/2022, 5:48 PM).
- Preview Tab:** Displays a preview of the Excel spreadsheet content. The main text reads "Upper Spire Vacation Rentals LLC". Below this is the address: "100 Fremont Street, San Francisco, CA 94105, United States" and contact information: "+1 415-863-9211", "info@usrentals.com", and "usrentals.com". A "Booking Details" section lists:
 

Booking Details	
Check-in	Saturday 18 June, 2022
Check-out	Tuesday 28 June, 2022
Guests	2 adults
Unit	Strip View Suite
- Right Sidebar:** Contains three panels:
  - Upload New File Version:** A box with the text "Drop new file version here".
  - VPS File Versions (1):** Shows a single version with ID "00000254", created on "5/13/2022, 5:48 PM" by "Nick Nesterov". A "View All" link is present.
  - VPS External Links (1):** Shows a link to "Reservation Thomas Moore.xlsx".

## Highlights panel

In the highlights panel, you can perform various tasks by clicking the corresponding quick actions, which will be discussed in more detail in the following paragraphs. The highlights panel also displays several key information fields for a particular file.

### Quick actions

Quick actions give you easy access to perform various tasks related to the opened file record.

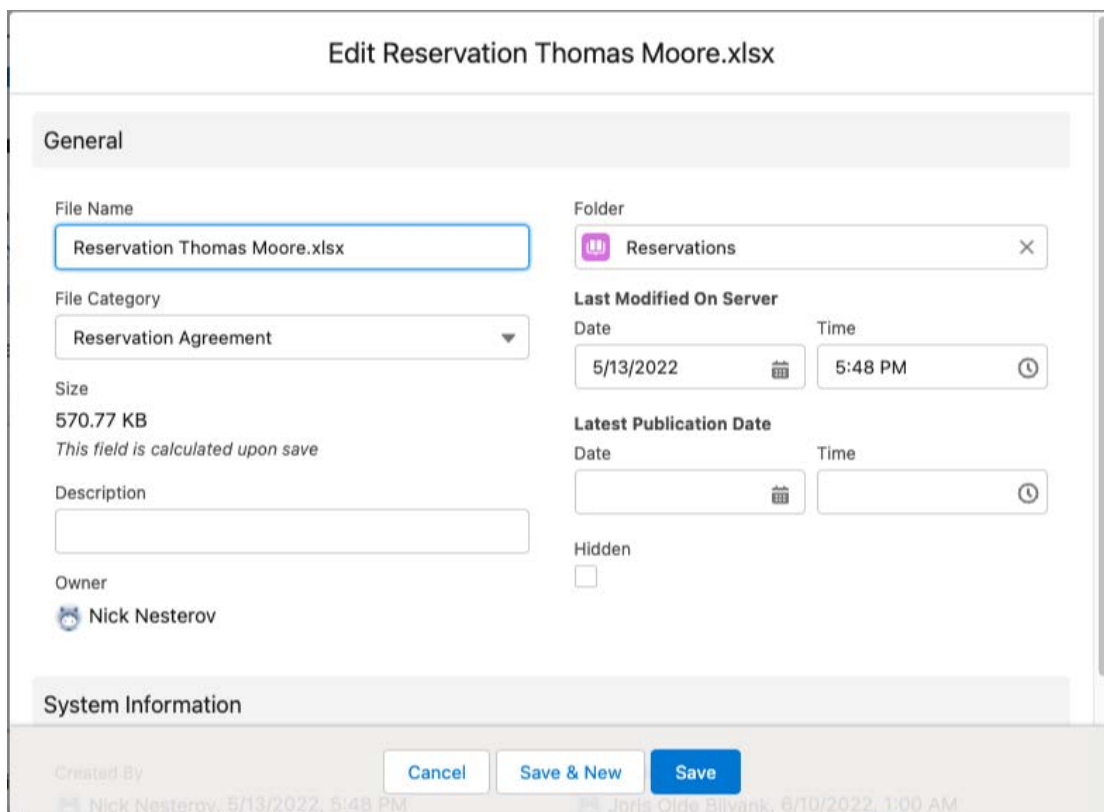


### Download

This quick action allows users to download the file from the Lightning Record Page.

### Edit

When you click this quick action, a pop-up window opens that allows you to edit the file details quickly, as illustrated in the figure below.



**Edit Reservation Thomas Moore.xlsx**

**General**

File Name: Reservation Thomas Moore.xlsx

File Category: Reservation Agreement

Size: 570.77 KB  
*This field is calculated upon save*

Description:

Owner: Nick Nesterov

Folder: Reservations

Last Modified On Server

Date: 5/13/2022 Time: 5:48 PM

Latest Publication Date

Date: Time:

Hidden:

**System Information**

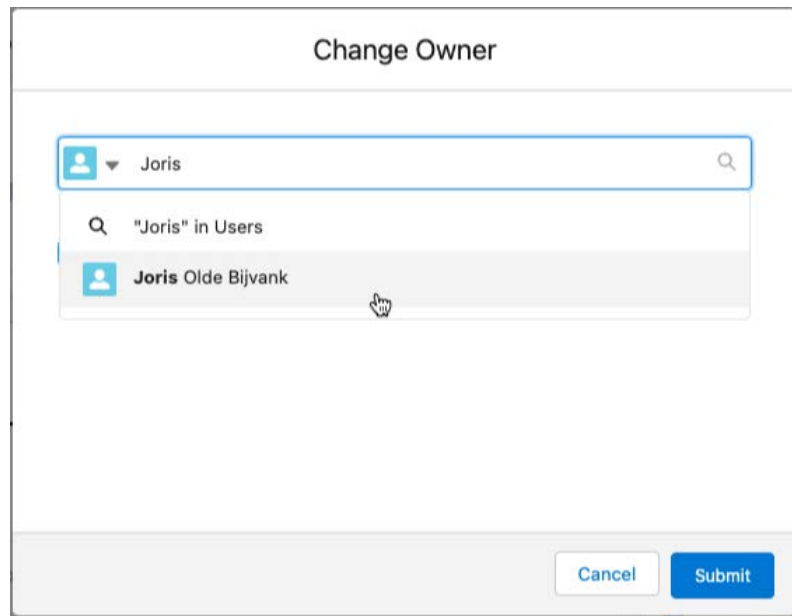
Created By: Nick Nesterov, 5/13/2022, 5:48 PM

Created By: Joris Oude Blyvink, 6/10/2022, 1:00 AM

Buttons: Cancel, Save & New, Save

### *Change Owner*

This quick action allows you to change the owner of a selected file, similar to how the owner of a standard Salesforce record can be changed. You can also send the new user a notification email, which is chosen by default.



The screenshot shows a 'Change Owner' dialog box. At the top, the title 'Change Owner' is centered. Below the title is a search input field containing the text 'Joris' and a search icon. Below the search field is a list of search results. The first result is 'Joris Olde Bijvank', which is highlighted in grey and has a mouse cursor pointing to it. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Submit'.

## Sharing

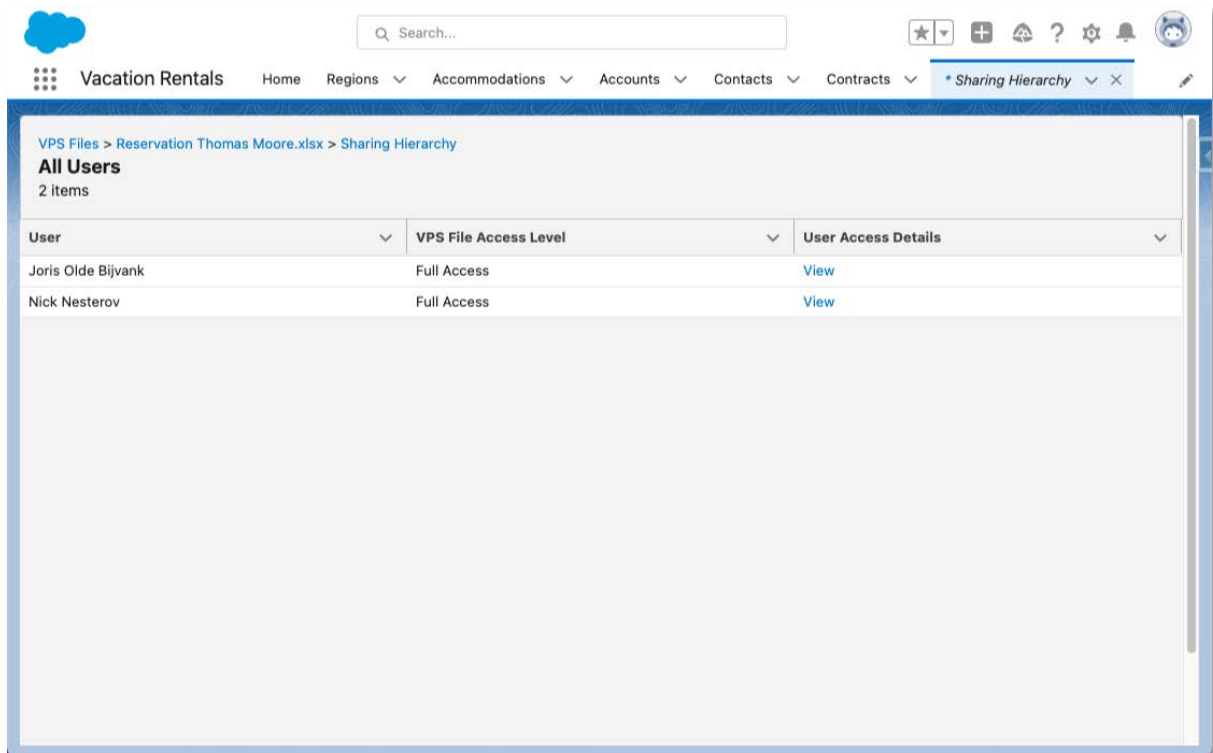
The *sharing* quick action opens a pop-up window where sharing rules for the opened file can be defined. A file can be shared with individual users and public groups, roles, and subordinates. For each sharing rule, the File Access Level can be changed. As such, one group of users can have “Read Only” access to the same file, while another group could have “Read/Write” access.

Name ↑	Type ↑	VPS File Acces...	
All Internal Users	All Internal Users	Read/Write	×
Joris Olde Bijvank	User	All	×

### Sharing Hierarchy

The Sharing Hierarchy quick action redirects to a list view that displays all users with whom the file is shared and their respective access levels.

**Note:** The Sharing Hierarchy solely provides an overview of previously defined sharing rules. Adding new ones is done through the Sharing quick action described in the previous paragraph.



The screenshot shows the Salesforce interface for the 'Sharing Hierarchy' of a file. The breadcrumb trail is 'VPS Files > Reservation Thomas Moore.xlsx > Sharing Hierarchy'. The page title is 'All Users' with '2 items'. The table below lists the users and their access levels.

User	VPS File Access Level	User Access Details
Joris Olde Bijvank	Full Access	<a href="#">View</a>
Nick Nesterov	Full Access	<a href="#">View</a>

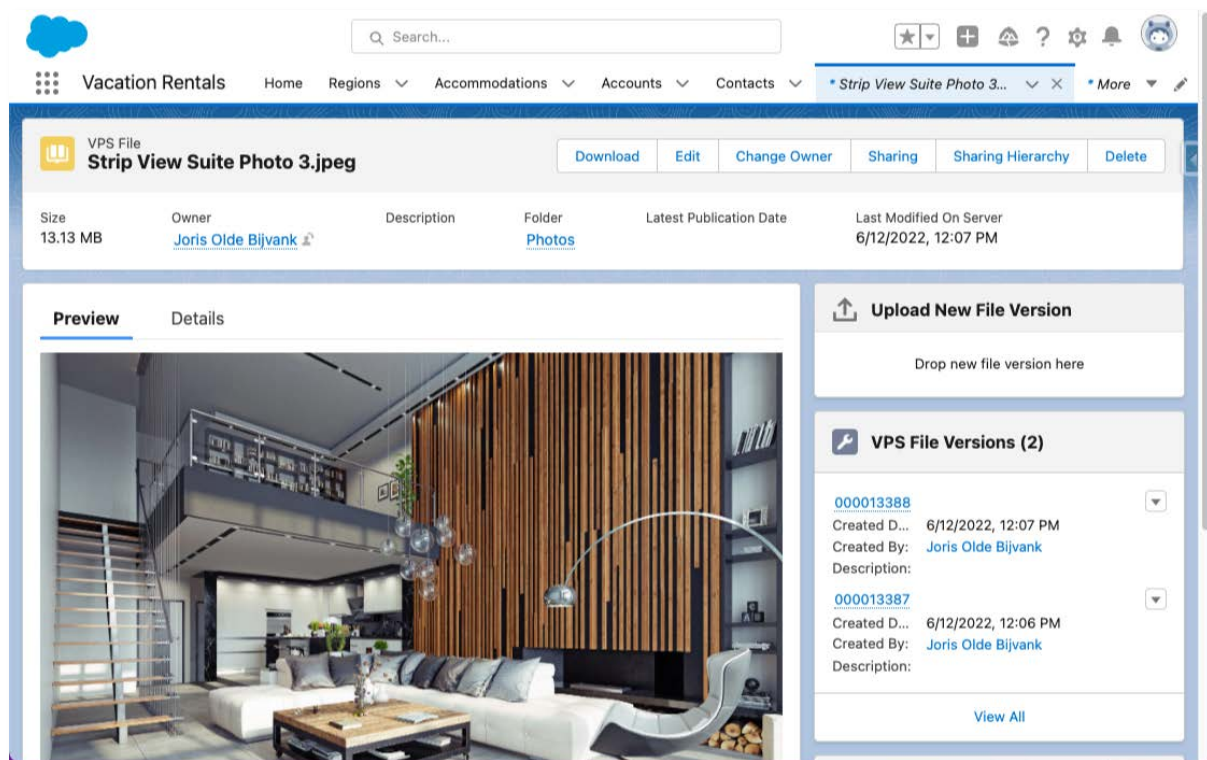
### Delete

Clicking this quick action button allows users to delete the opened file. Depending on the settings set by the Salesforce admin, the deletion can be instant and permanent, or the file could be placed in the recycle bin, which is only accessible by the Salesforce admin.

## Main region

## Preview tab

The preview component can show previews of most popular file types, such as PDF documents, pictures of various formats, and Microsoft Office documents.



## Details tab

The details tab provides details about the opened file. It contains the following fields:

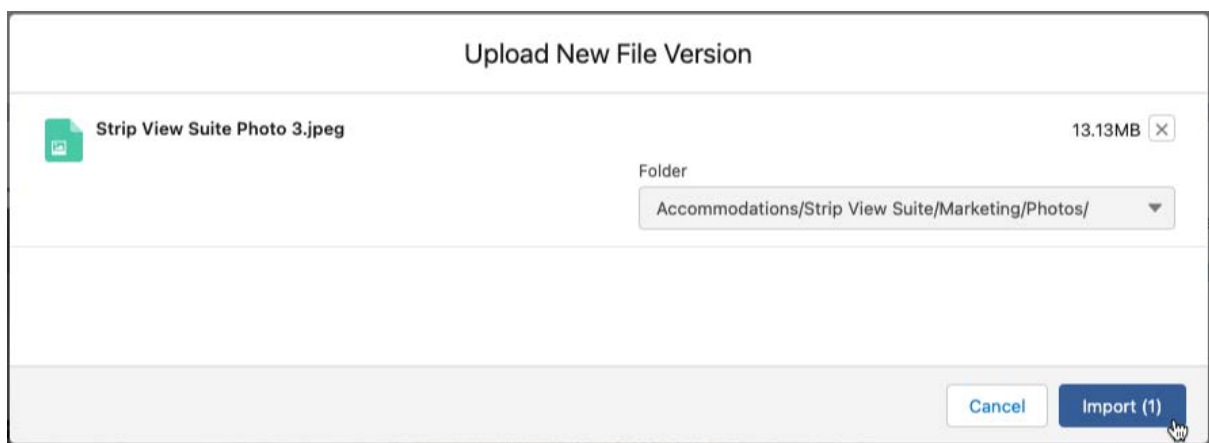
Field	Description
<b>File Name</b>	The name of the file.
<b>File Category</b>	The category of the file.
<b>Size</b>	Size of the file.
<b>Description</b>	Description of the file. This field is searchable within the standard Salesforce search.
<b>Owner</b>	The current owner of the file.
<b>Folder</b>	The location where the file is stored.
<b>Last Modified on Server</b>	The last date/time the file has been modified on the server.
<b>Last Publication Date</b>	The last date/time that any file version related to this file has been published.
<b>Hidden</b>	This field indicates whether the file is hidden. If a file is hidden it will not be shown in the Files and Folders component by default.

## Sidebar

### Upload New File Version

As the help text in this element suggests, users can upload a new version of a file by dragging and dropping it onto the component.

**Note:** The extension of the uploaded file must be the same as that of the original file. If this condition is met, a new pop-up window appears, asking you to confirm the upload of the new file version.

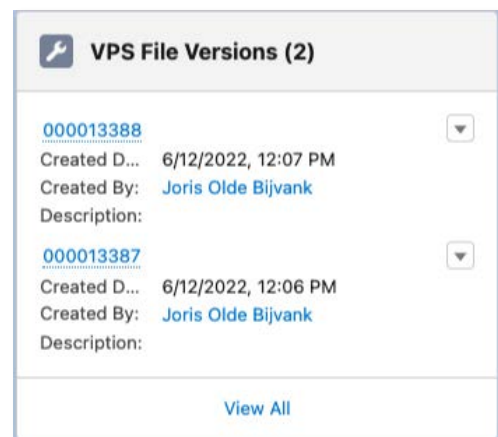


### CDM File Versions

This element provides an overview of the last three versions of the selected file. If the header shows (3+), *more than three versions are available*. Click "View All" to open a list that shows all versions available on a new page.

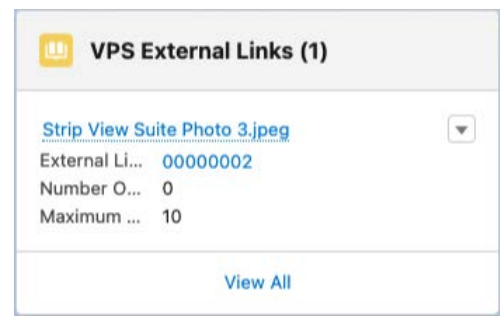
Additionally, for each file version record, there is a dropdown menu where you can edit or delete the selected file version.

Clicking the file version number in the list will open the File Version Lightning Record Page.



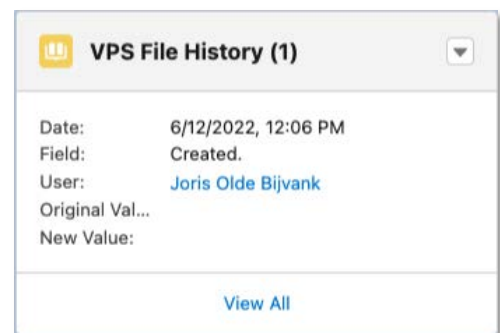
### CDM External Links

External Link Bundles are used to share files with people outside of your organization. If a file is contained in an External Link Bundle, it is shown here. The chapter *External Link Bundles* provides more information on external link bundles.



### CDM File History

The File History lists changes to specific fields where history tracking is enabled. The filename, key, and hidden state are tracked by default.



## Chapter 4: File Version Lightning Record Page

### Description

The File Version Lightning Record Page can be accessed through the File Lightning Record Page, as outlined in the previous chapter. Structurally, it is similar to the File Lightning Record Page and the Salesforce Lightning Record Pages of other Salesforce objects.

The screenshot shows the Salesforce File Version Lightning Record Page. At the top, there is a search bar and navigation tabs for 'Vacation Rentals', 'Home', 'Regions', 'Accommodations', 'Accounts', 'Contacts', and 'Reservation Thomas Mo...'. Below the navigation is a header for the file version: 'VPS File Version Reservation Thomas Moore.xlsx'. To the right of the header are quick action buttons: 'Download', 'Edit', 'Publish', 'Change Owner', 'Sharing', 'Sharing Hierarchy', and 'Delete'. Below the header, file details are displayed: Size (570.77 KB), Owner (Nick Nesterov), Description, Version Number (1), Publication Date, and Upload Date (5/13/2022, 5:48 PM). The main content area is split into two panels. The left panel, titled 'Preview', shows a preview of the Excel spreadsheet with columns A through J and rows 24 through 41. The spreadsheet content includes a table with columns 'Description' and 'Amo', and rows for '8.00 x Night (\$160.00)', 'Subtotal', 'VAT', and 'Total'. The right panel, titled 'Upload New File Version', contains a drop zone with the text 'Drop new file version here'.

### Highlights panel

### Quick actions

#### *Download*

This quick action lets you download the opened file version.

### Edit

When you click on this quick action, a pop-up window opens that allows you to edit several details for this specific file version quickly, as illustrated in the figure below.

**Edit 000000254**

**General**

File: Reservation Thomas Moore.xlsx

Version Number: 1

Description:

Upload Date: Date: 5/13/2022, Time: 5:48 PM

Publication Date: Date: , Time:

Size: 570.77 KB  
*This field is calculated upon save*

**System Information**

Created By: Nick Nesterov, 5/13/2022, 5:48 PM

Last Modified By: Nick Nesterov, 5/17/2022, 8:48 AM

Buttons: Cancel, Save & New, Save

### Publish

Clicking the **Publish** button sets the publication date of the file version.

### Change Owner

This quick action allows you to change the owner of the opened file version and send a notification email to the new owner.

**Note:** Changing the owner of a file version does not change the owner of the related file, even if there is only one file version.

### *Sharing*

The sharing quick action opens a pop-up window where sharing rules for the opened file version can be defined. A file can be shared with individual users and public groups, roles, and subordinates. For each sharing rule, the File Version Access Level can be changed. As such, the same file version can have the “Read Only” access for one group of users, while another group could have the Read/Write access to the file version.

### *Sharing Hierarchy*

The Sharing Hierarchy quick action redirects you to a list view that displays all users with whom the file version is shared and their respective access levels.

**Note:** The Sharing Hierarchy solely provides an overview of previously defined sharing rules. Adding new ones is done through the Sharing quick action described in the previous paragraph.

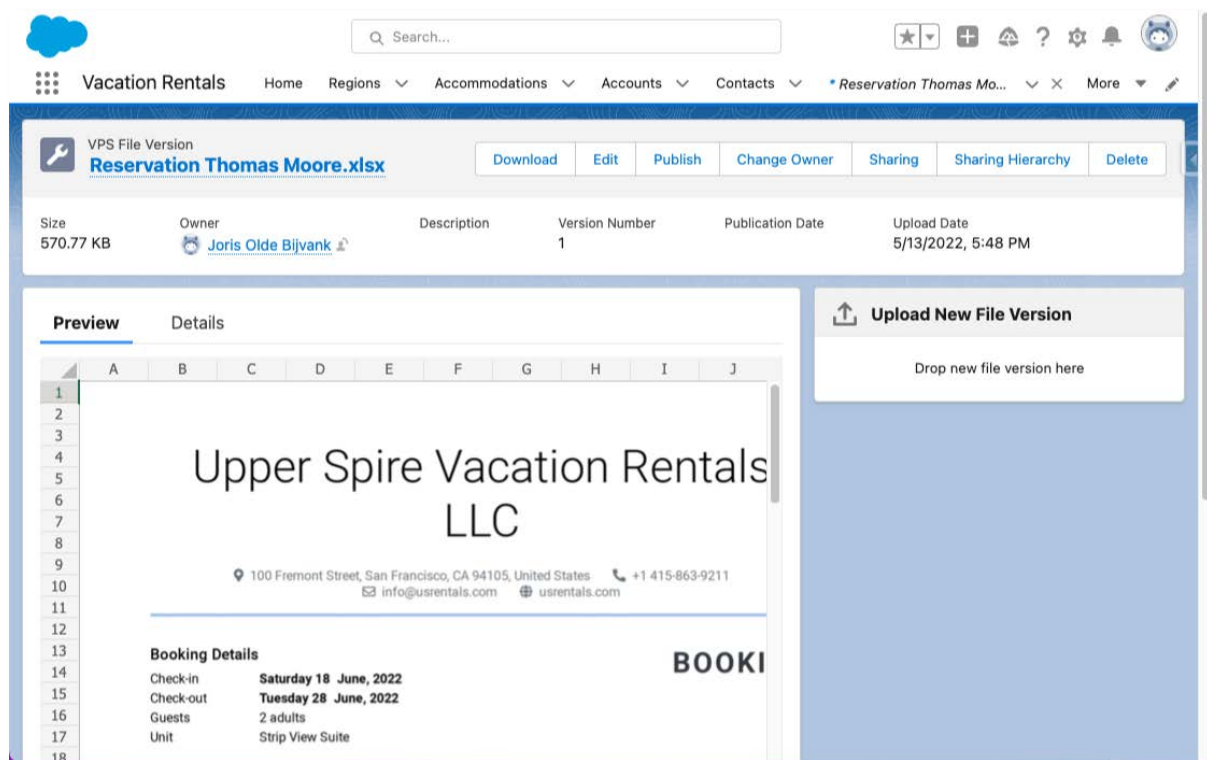
### *Delete*

Clicking this quick action allows you to delete the opened file version. Depending on the settings set by the Salesforce admin, the deletion can either be instant and permanent, or the file version could be placed in the recycle bin only accessible by the Salesforce admin.

## Main region

## Preview tab

The preview component can show previews of most popular file types, such as PDF documents, pictures of various formats, and Microsoft Office documents.



## Details tab

The details tab provides details about the opened file. It contains the following fields:

Field	Description
<b>File</b>	Lookup to the related file record.
<b>Version Number</b>	A sequential number that represents the version of the file.
<b>Description</b>	Description of the file version where you should enter specifics on the file version.
<b>Upload Date</b>	Date/time that this file version has been uploaded.
<b>Publication Date</b>	Date/time that this file version has been published.
<b>Size</b>	Size of the file version.

## Sidebar

### Upload New File Version

As the help text in this element suggests, you can upload a new version of a file by dragging and dropping it onto the component.

**Note:** The extension of the uploaded file must be the same as that of the original file. If this condition is met, a new pop-up window will appear, asking you to confirm uploading the new file version.

## Chapter 5: Folder Lightning Record Page

### Description

When opening a folder, the Folder Lightning Record Page will appear. This Page contains details about the folder.

### Highlights panel

### Quick actions

#### *Edit*

When clicked upon, this quick action opens a pop-up window that allows users to quickly edit several details for this specific file version, as illustrated in the figure below.

**Edit Reservations**

**General**

\* Folder Name  
Reservations

Parent Folder  
Strip View Suite

Hidden

Owner  
Joris Olde Bijvank

File Category Restriction

Folder Creation Restriction

**System Information**

Created By  
Joris Olde Bijvank, 5/8/2022, 1:31 PM

Last Modified By  
Joris Olde Bijvank, 5/8/2022, 1:31 PM

Cancel Save & New Save

#### *Change Owner*

This quick action allows users to change the owner of the opened folder. It is also possible to send the new user a notification email. This option is chosen by default.

### *Sharing*

The sharing quick action opens a pop-up window where sharing rules for the opened folder can be defined. A folder can be shared with individual users and public groups, roles, and subordinates. For each sharing rule, the Folder Access Level can be changed. As such, the same folder can have the “Read Only” access for one group of users, while another group could have the Read/Write access to the folder.

### *Sharing Hierarchy*

The Sharing Hierarchy quick action redirects you to a list view that displays all users with which the folder is shared and their respective access levels.

**Note:** The Sharing Hierarchy solely provides an overview of previously defined sharing rules. Adding new ones is done through the Sharing quick action described in the previous paragraph.

### *Delete*

Clicking this quick action lets you delete the opened folder, including its subfolders and files/file versions. Depending on the settings set by the Salesforce admin, the deletion can either be instant and permanent, or the folder and its contents could be placed in the recycle bin only accessible by the Salesforce admin.

## Main region

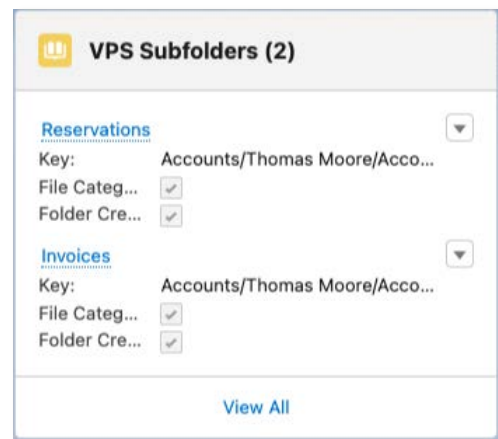
### Related Lists

The related lists show a selection of records related to the opened folder. The number of records shown is limited. To view all records of a related list, click the “View All” link in the bottom center of the related list.

**Note:** The CDM Subfolders and CDM Files related lists show all records, even those marked as hidden. Show/Hide files is a functionality that is only available within the Files and Folders component.

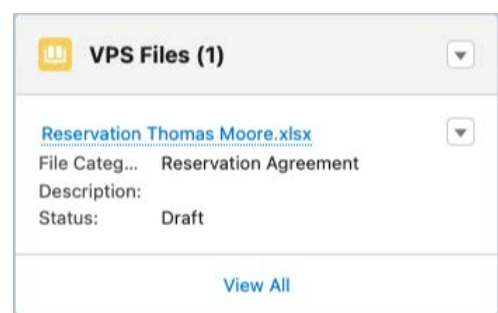
### CDM Subfolders

The CDM Subfolders related lists show the child folders related to the opened folder. From here, you can open the subfolder by clicking its name.



### CDM Files

Under CDM Files, you will find a selection of files located inside the opened folder. To preview the file, click its name.



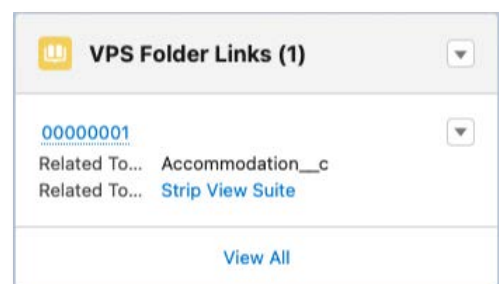
### CDM Folder File Categories

Suppose the File Category Restriction setting is turned on for the opened folder by the Salesforce admin. In that case, the CDM Folder File Categories related list shows the available file categories for this folder. You cannot store files in this folder with a different file category than those in this related list.



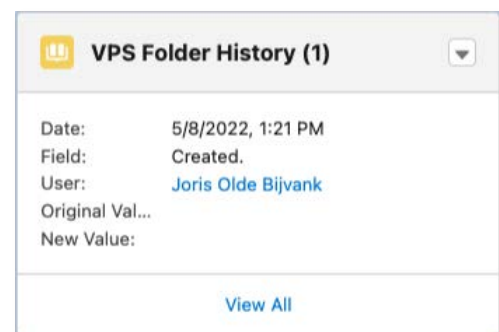
### CDM Folder Links

If the opened folder is directly linked to a Salesforce record, it will be shown on this list. Opening the Salesforce record will show this folder as the root of the Files and Folders component.



### CDM Folder History

The CDM Folder History related list shows changes made to the opened folder. Changes to the folder name, key, folder creation restriction, and hidden fields are shown by default.



## Details

The details tab provides details about the opened file. It contains the following fields:

Field	Description
<b>Folder Name</b>	Name of the folder.
<b>Parent Folder</b>	Lookup to the parent folder.
<b>Hidden</b>	This field indicates whether the file is hidden. If a file is hidden, it will not be shown in the Files and Folders component by default.
<b>Owner</b>	The current owner of the file.
<b>File Category Restriction</b>	Indicates whether it is required for all files in this folder to have a file category that is configured in the CDM Folder File Categories related list.
<b>Folder Creation Restriction</b>	Indicates whether a user can create a new folder in this folder.

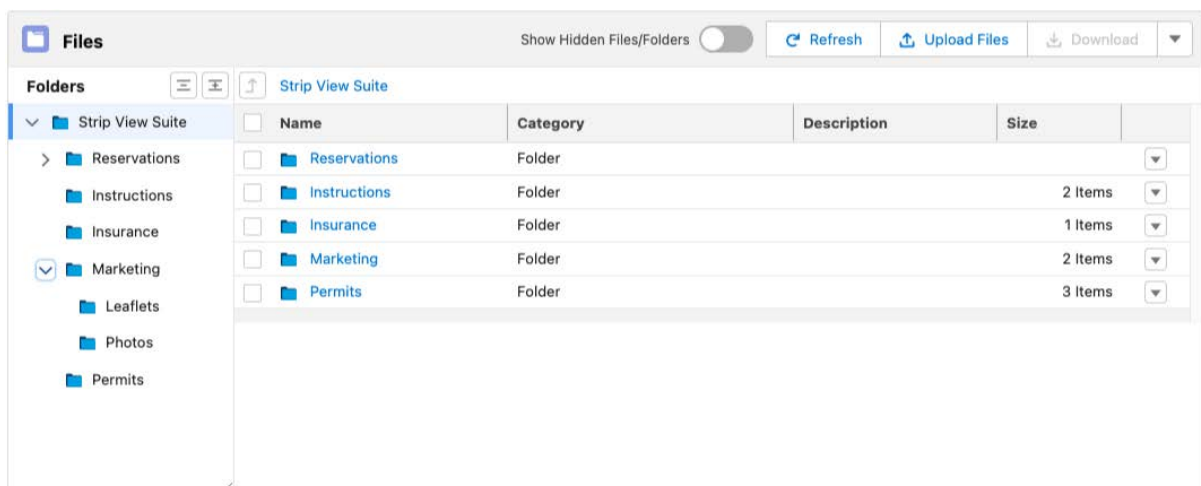
## Chapter 6: Auto Folder Creation (AFC)

### Description

The Auto Folder Creation functionality of Cartularius allows for the automated creation of folders based on the Salesforce object model and pre-defined conditions set up by the Salesforce admin. This way, an advanced folder hierarchy is kept up to date without manually setting up this structure for every record you create.

### Direct Folders

The Salesforce admin can create a folder hierarchy per sObject and record type combination. These folders are directly related to Salesforce records, as shown in the image below.



In this example, you will see a custom accommodation record that we made for this manual with its corresponding folder structure. For each accommodation record, you will see the following hierarchy of Direct Folders:

- Instructions
- Insurance
- Marketing
  - Leaflets
  - Photos
- Permits

If you paid close attention, you would see that one folder, the Reservations folder, is not listed in the hierarchy of Direct Folders. This is done on purpose because it is a so-called Indirect Related Folder, which we will discuss in the next section.

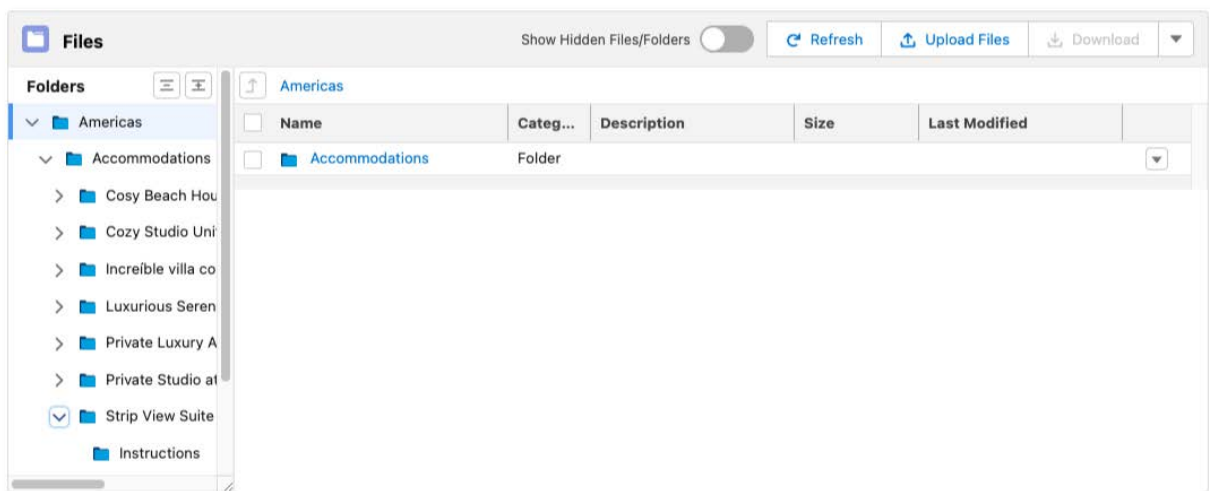
## (Indirect) Related Folders

Related Folders and Indirect Related Folders take folder hierarchies to the next level. They use the Salesforce object model to show files and folders from one object to another without the need for multiple copies of the files and folders in question.

Let us explain this with a couple of examples.

### Related Folders

In our example environment, we have created a fictional holiday accommodation rental agency that operates in multiple regions. Each region has one or more accommodations, which can be rented to customers (accounts) using reservations (contracts).



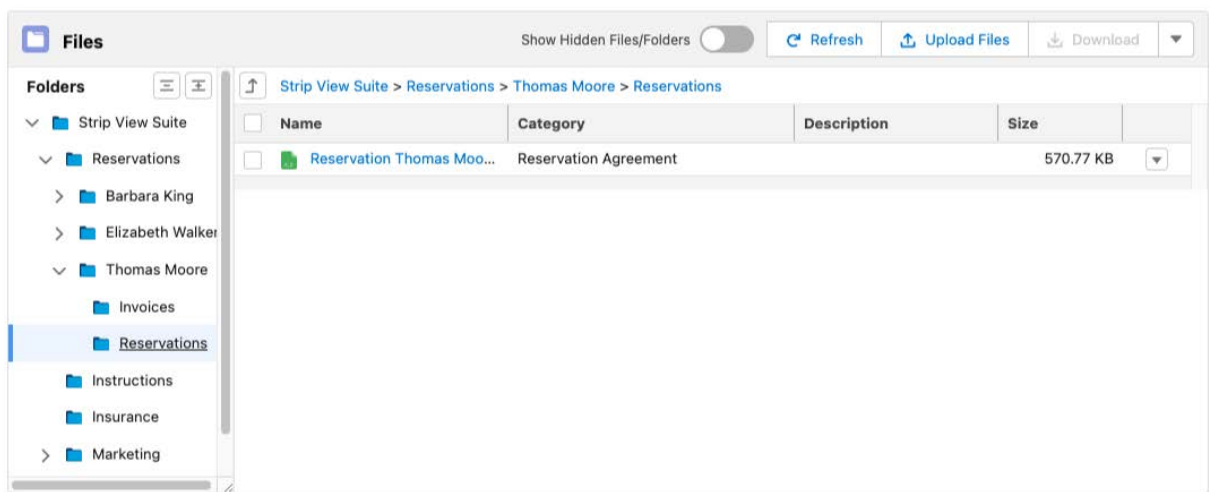
An accommodation is related to a region via a so-called lookup field. Because the administrator has also set up a Related Folder record that connects the accommodation and the region using this lookup field, the Related Files and Folders component shows the folder hierarchy set up for the accommodation as subfolders under the region. This saves a lot of time when you are inside the region record and quickly want to view a file for which you know it should be available on the related accommodation record.

## Indirect Related Folders

Like a “standard” Related Folder, an Indirect Related Folder shows a folder hierarchy following the Salesforce object model. This time, we use a junction object to link the records. In the example of the holiday accommodation rental agency, we set up an Indirect Related Folder between an accommodation and an account using the contract record as the junction object. On top of this, we created a (CDM Where Clause) field that defines the rules for showing or hiding the folders.

**Note:** The CDM Where Clause can show folders for accounts with a running contract only. This means that the folders will be shown when the contract is active and will be hidden when the contract has ended. The rules to show or hide the folders are customizable by the administrator. This feature will keep the clutter in the folder hierarchy to a minimum.

Inside the accommodation object, you will only see the active reservations.



## File Categories

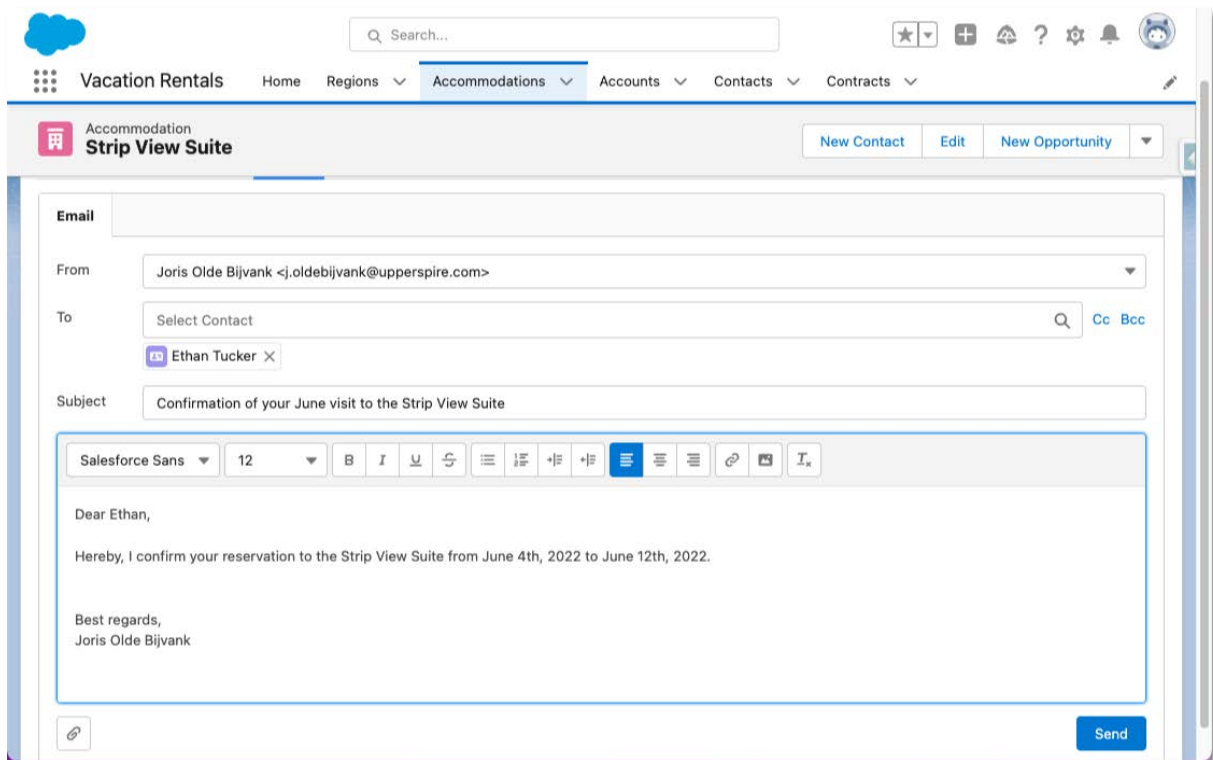
As a part of the Auto Folder Creation process, Salesforce admins can set up file categories per folder. When the File Category Restriction is enabled for a folder, you can only store files with one that matches the pre-configured File Categories.

The Automated Folder Creation process using (Indirect) Related Folders and File Categories helps achieve a structured and clutter-free folder hierarchy where you can always find the files you need.

## Chapter 7: CDM Email Component

### Description

You can send files stored in CDM to your contacts or email addresses using the CDM Email Component.



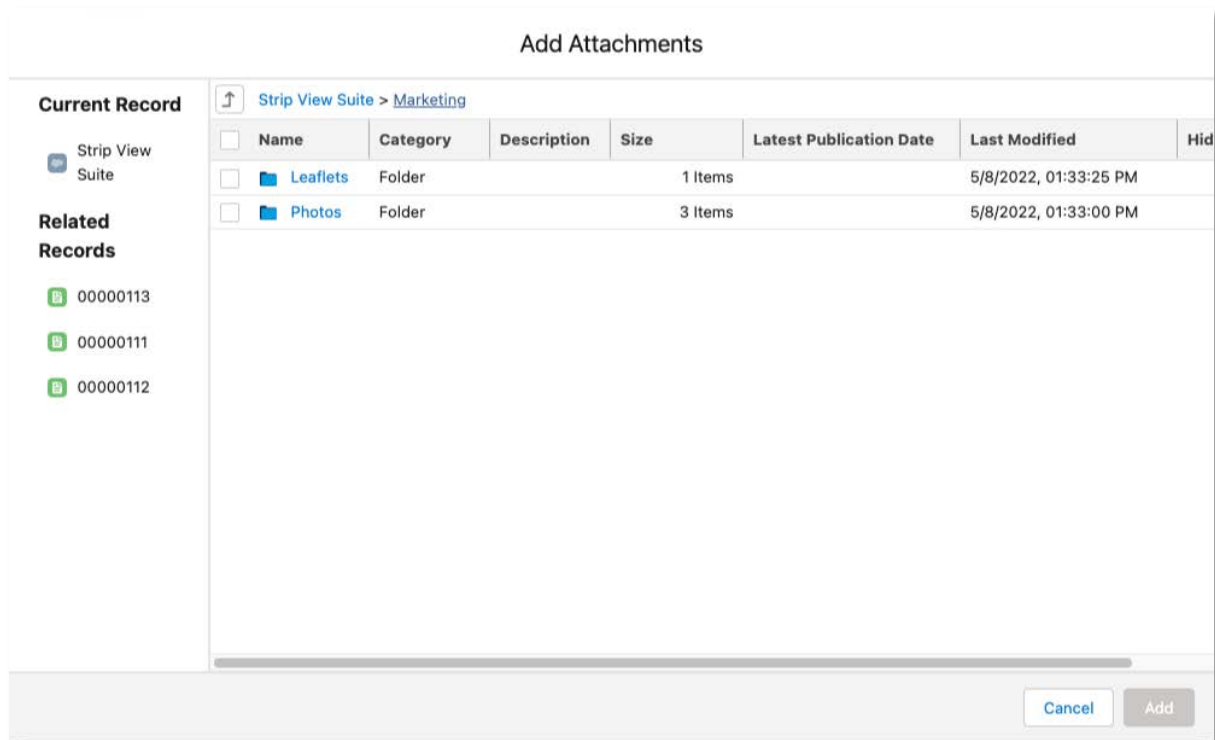
### Send an Email with an Attachment

Follow the instructions below to send an email with an attachment:

1. Open the email component.
2. Select a contact or type in an email address directly.
3. Optionally, select a Cc or Bcc.

**Note:** Show the Cc or Bcc inputs by clicking the Cc or Bcc tag on the right side of the To input field.

4. Enter a subject.
5. Enter the body text.
6. Click the **Add Attachments** button (the button with the icon showing a paperclip).



7. Choose one or more files by clicking the corresponding row selection element.

8. Click the **Add** button.

**Note:** You can only select files from one folder at a time. If you want to attach files from multiple folders, you must repeat steps 6 to 8 for each folder.

9. Click the **Send** button.

**Note:** It is now possible to select attachments from related Salesforce records. To do so, click a related record on the left side of the *Add Attachments* modal.

## Chapter 8: External Link Bundles

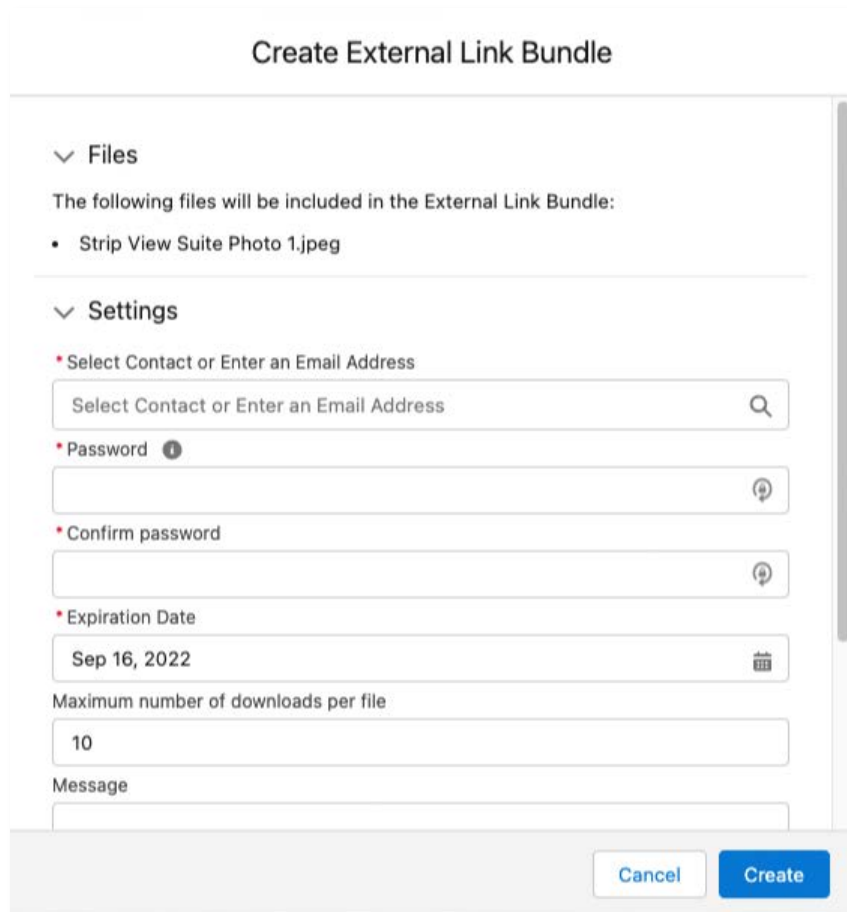
### Description

An External Link Bundle allows you to share your files securely with anyone outside your organization.

### Create an External Link Bundle

You can create an External Link Bundle within the Files and Folders component by selecting one or more files and clicking the **Create External Link Bundle** button or by selecting the *Create External Link* row action mentioned in the chapter *Files and Folders Component*.

Either method opens the Create External Link Bundle modal, as shown below.



The screenshot shows a modal window titled "Create External Link Bundle". It is divided into two main sections: "Files" and "Settings".

- Files:** A dropdown menu is open, showing "Files". Below it, a message states "The following files will be included in the External Link Bundle:" followed by a list containing "Strip View Suite Photo 1.jpeg".
- Settings:** A dropdown menu is open, showing "Settings". It contains several required fields:
  - Select Contact or Enter an Email Address:** A search input field with a magnifying glass icon.
  - Password:** A password input field with a strength indicator icon.
  - Confirm password:** A password input field with a strength indicator icon.
  - Expiration Date:** A date picker showing "Sep 16, 2022".
  - Maximum number of downloads per file:** A numeric input field with the value "10".
  - Message:** A text input field.

At the bottom right of the modal, there are two buttons: "Cancel" and "Create".

Complete the fields within the modal and click the **Create** button to create the External Link Bundle.

Field	Description
<b>Select Contact</b>	Select a contact to whom the External File Bundle is emailed.
<b>Password</b>	<p>Enter a password that is used to protect the shared files against unauthorized access.</p> <p>If the Salesforce admin enabled the <i>Enforce Strong Password</i> setting, it is required to enter a strong password.</p> <p>A strong password is at least 8 characters in length, contains both uppercase and lowercase letters, contains both letters and numbers, and contains at least 1 special character.</p>
<b>Confirm Password</b>	Make sure you enter the same password as in the previous field.
<b>Expiration Date</b>	<p>The expiration date is enforced to make sure that files are not unrestrictedly accessible by third parties.</p> <p>After the expiration date, the External Link Bundle is automatically deactivated.</p>
<b>Maximum Number of Downloads per File</b>	This field limits the number of times a file can be downloaded before becoming unavailable.
<b>Message</b>	This message will be sent to the recipient upon activation of the External Link Bundle.
<b>Activate and Send Email on Creation</b>	Enabling this field will automatically activate and send the email when you create the External Link Bundle.

## FEEDBACK

Thank you for using Cartularius. If you encounter any problems, irregularities, or anything else while using our software or reading our documentation, do not hesitate to contact us at [support@upperspire.com](mailto:support@upperspire.com). Your feedback would be helpful in improving our products and services for you and other customers.

If you like CDM, we would be grateful if you could write a review in the review section of our [AppExchange listing](#). This helps us reach a larger audience and allows our company to grow and develop better products and services.

## MORE RESOURCES

CDM AppExchange listing

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000GYhhhUAD>

CDM website

<https://www.cartularius.com>

Upper Spire website

<https://www.upperspire.com/>

UPPER  
**SPiRE** | the summit of  
Salesforce cloud apps