

Document Uploader

Drag-and-drop file upload on any record, with categories, notes and expiry built in.

 Document Uploader

Drag files here or click Upload Files

 Upload Files

 Or drop files

1 file(s) pending

Set Category for All 

-- No category --

Save All

Invoice-2026-0412.pdf

Uncategorized  

Required Documents · 1 of 1 provided

SOW

Provided

Documents

SOW 1

[SOW-2026-Implementation](#)
Uploaded by Jordan Smith on Oct 10, 2026
Expires Oct 30, 2026 Expires soon 

1

drop to upload many files at once,
each a compact row

0

Save buttons: every choice saves
itself

5

languages: English, German,
Spanish, French (CA), Portuguese
(BR)

Document Uploader adds an upload area to any record page. Users drop files, choose a **category** such as Invoice or Contract, and add a note. Admins decide which categories exist and when each is offered, mark documents **required**, and set **expiry reminders**. Files stay standard Salesforce Files, and the category travels with them.

Files on a record are only useful when you know what they are

Standard Files list everything the same way. A pile of untitled PDFs on an Account does not say which is the signed contract, whether the invoice is missing or when a certificate expires, so people chase documents by email and ask again.

1

Everything categorised on arrival

Pick a category per file, or **Set Category for All** for a batch. Suggestions based on the file name and type speed it up.

2

Know what is missing

Mark categories **Required** for the records they apply to. The record shows a checklist, for example **1 of 1 provided**.

3

Never miss an expiry

Give a file an expiry date and its category a reminder lead time. Files nearing expiry are flagged, and reminders go to the owner.

4

Rules decide what is offered

Offer a category by file name, extension or size, by the record, or by the person uploading. Categories can **limit file types and size**.

5

Data you can use elsewhere

Category and notes are stored on the File itself, so they are available to **reports, flows and Apex**.

6

Zero training

It is the drag-and-drop area people expect. Each choice saves by itself with a small tick.

Without Document Uploader

- Files pile up with no indication of what they are
- Missing documents found only when someone asks
- Expiry dates tracked in a spreadsheet
- Category and notes lost to a naming convention

With Document Uploader

- Every file categorised, with notes, in the same step as the upload
- A required-documents checklist on the record
- Expiry dates and reminders built in
- Category and notes on the File, ready for reports and flows

WHAT IT DOES

Upload, categorise, and keep track

Drop files, pick categories

Drag files onto the record. Each appears as a compact row, with a suggested category when only one fits. Set a category for the whole batch, or open a row to add notes and an expiry date.

Document Uploader

Drag files here or click Upload Files

Upload Files

Or drop files

2 file(s) pending

Set Category for All

-- No category --

Save All

SOW-2026-Implementation

SOW · Suggested

File Name

SOW-2026-Implementation

Category

SOW

Notes

Add a note about this file (optional)

Suggested: the only category that matches this file. Pick another if it's wrong. [Accept Suggestion](#)

A file opened to categorise, add notes and set expiry.

Document Uploader

Drag files here or click Upload Files

Upload Files

Or drop files

1 file(s) pending

Set Category for All

-- No category --

Save All

Invoice-2026-0412.pdf

Uncategorized

Required Documents · 1 of 1 provided

SOW

Provided

Documents

SOW

1

Documents grouped by category, with expiry flags.

A catalogue of document categories

Create categories such as Invoice, Contract or Receipt, with a description and sort order. Each can restrict file types and size, be required, and set its reminder lead time.

Document Uploader Configuration

Categories

Add Category

Label	Description	Active	Sort Order
Invoice	Billing documents from vendors	✓	10
Contract	Signed agreements and amendments	✓	20
Receipt	Proof of payment	✓	30

The Document Categories tab.

Required documents and expiry at a glance

The record lists required categories with a Provided status, and shows uploaded documents grouped by category with who uploaded them and when they expire.

WHAT IT DOES, CONTINUED

Rules and settings for administrators

Label ⓘ

Invoice

Object ⓘ

Account

Sort Order ⓘ

0

Description ⓘ

Billing documents from vendors

Allowed File Types ⓘ

e.g. pdf, docx

Max File Size (MB) ⓘ

Reminder Days ⓘ

30

Active

☒

Required

☐

Rule Conditions (optional) ⓘ

1

File Extension

Equals

pdf

2

File Name

Equals

invoice

+ Add Condition

*Condition Logic ⓘ

1 AND 2

Applies to 15 of the last 15 Account records.

File conditions count as met here, and user conditions are checked as you.

A category with conditions.

Choose where the uploader runs

Enable the uploader per object, optionally only when conditions on the record are met.

Enabled Objects

Document Uploader refuses to run on any object below until it's enabled here. Add optional conditions to restrict an object further, e.g. only on Accounts where Type = Customer.

Object	Active	Conditions	
Account	✓	Always enabled	Edit
Opportunity	✓	Always enabled	Edit

Enable an Object

Enabled objects.

Expiry Reminders

Every morning at 6:00 this job sends each file's owner one bell notification when the file is within its category's Reminder Days of expiring. Start it once; it runs every day until stopped.

Stopped

Start Job

Expiry reminders in Settings.

Rules that decide what is offered

Offer a category only when the file name, extension or size matches, or for particular records and people.

Expiry reminders on a schedule

A scheduled job reminds file owners before a file's expiry, and can be started or stopped from Settings.

HOW IT WORKS

Up and running in four steps

1. Enable objects

Choose where the uploader may run.

2. Create categories

Add categories, their rules, limits and expiry reminders.

3. Place the uploader

Add the component to the record page in Lightning App Builder.

4. Upload

Users drop files, pick categories and add notes.

Who it is for

- **Finance, legal and contracts teams.** keep invoices, contracts and certificates organised on the right record.
- **Customer success and onboarding.** see at a glance which required documents are in.
- **Admins.** manage categories and rules without code.

Built for trust

- **Standard Salesforce Files.** Nothing proprietary: files appear in the record's Files list as usual.
- **Three permission sets:** Admin, User and Read Only, plus a custom permission to hide the uploader from people without access.
- **Category and notes are stored on the File** (custom fields on ContentVersion) so reports, flows and Apex can use them.
- **In-app Administrator and User guides** in five languages.

Everything included

- ✓ Drag-and-drop upload on any enabled record page
- ✓ Several files at once, compact rows
- ✓ Category and notes per file, Set Category for All
- ✓ Suggested category from file name and type
- ✓ Category rules by file name, extension, size, record or person
- ✓ Allowed file types and maximum size per category

- ✓ Required categories with a provided checklist
- ✓ Expiry dates, flags and owner reminders
- ✓ Scheduled reminder job you can start and stop
- ✓ Enabled objects with optional conditions
- ✓ Admin, User and Read Only permission sets
- ✓ In-app guides in five languages

Organise the files on your records

Document Uploader is built, tested and documented. Ask for a walk-through on the object where your teams collect documents.