File Drag and Drop Bundle

- Bundle Name: File Drag and Drop
- Bundle ID: 41309
- Location: Production (Account ID 3751218)
- Managed Bundle: Yes

File Drag and Drop Bundle

➤ File Drag and Drop enables you to upload single or multiple files from your desktop to the file cabinet or to a record page. It can also be used to attach multiple files directly to editable sub-lists of supported records and custom records.

Setup: File Drag and Drop Bundle

Go to Setup > Customization > File Drag and Drop Setup.

Setup: File Drag and Drop Bundle

- ▶ Click **New File Drag and Drop Record Type** to enable File Drag and Drop on a specific record.

- ▶ In the **Record Type** list, select the record type where you want to enable File Drag and Drop.

- ▶ Click the **Folder Name** field, and then select the default destination folder for the record.

- ▶ Check the **Use Folder Pattern** box to create a folder for uploaded files based on the specified folder pattern.

- ▶ In the **Folder Pattern** field, enter the folder path where you want to save uploaded files.

File Drag and Drop Setup Assistant

```
1 ─────────────── 2 ─────────────── 3
File Drag and Drop Preference   Enable File Drag and Drop on Record Types   Summary
```

Enable File Drag and Drop on Record Types
Choose the record type where you want to enable File Drag and Drop.

Specify the destination folder for uploaded files by entering the Folder Name or by defining a folder pattern.

| Save ▾ | Cancel | Reset | | Customize Form |

☐ INACTIVE

RECORD TYPE *

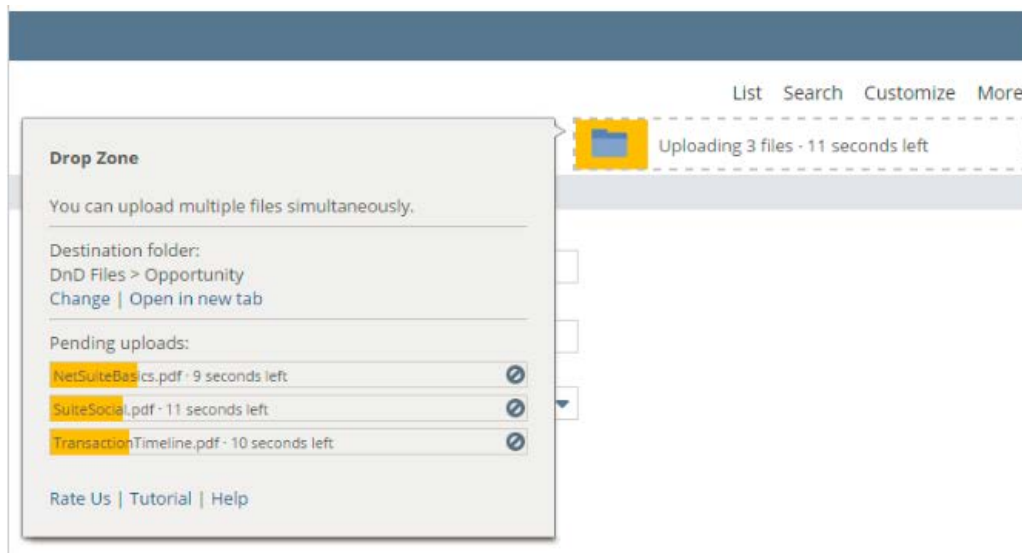`<Type then tab>` ⌄

FOLDER NAME

☐ USE FOLDER PATTERN

FOLDER PATTERN

Using: File Drag and Drop Bundle

To enable or disable File Drag and Drop:

▶ Go to Home > Set Preferences, and then click the **Custom Preferences** subtab.

▶ In the File Drag and Drop section, check or clear the **Enable File Drag and Drop** box to enable or disable the feature in your user account.

List   Search   Customize   More

Uploading 3 files · 11 seconds left

Drop Zone

You can upload multiple files simultaneously.

Destination folder:
DnD Files > Opportunity
Change | Open in new tab

Pending uploads:

NetSuiteBasics.pdf · 9 seconds left

SuiteSocial.pdf · 11 seconds left

TransactionTimeline.pdf · 10 seconds left

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Custom Administrator Role Bundle

▶ Bundle Name: Administrator Role-Customizable

▶ Bundle ID: 1251

▶ Managed Bundle: No

▶ Bundle Description: Creates an editable role that has all permissions.