



Web



From Salesforce



On this page



WEB > OPEN A DOCUMENT > FROM SALESFORCE

Open and display PDFs in a Salesforce Lightning web component



COPY PAGE



PDF



Nutrient Salesforce SDK enables you to open files from your local machine, Salesforce, or an external URL.

Open a file in Salesforce in one of the following ways:

- ✦ Using the built-in user interface (UI), you can open files from your local machine or Salesforce.
- ✦ Programmatically, you can open files from Salesforce or an external URL.

For more information on uploading documents to Salesforce, see the [Salesforce documentation](#).

Opening files using the built-in UI



ASK AI

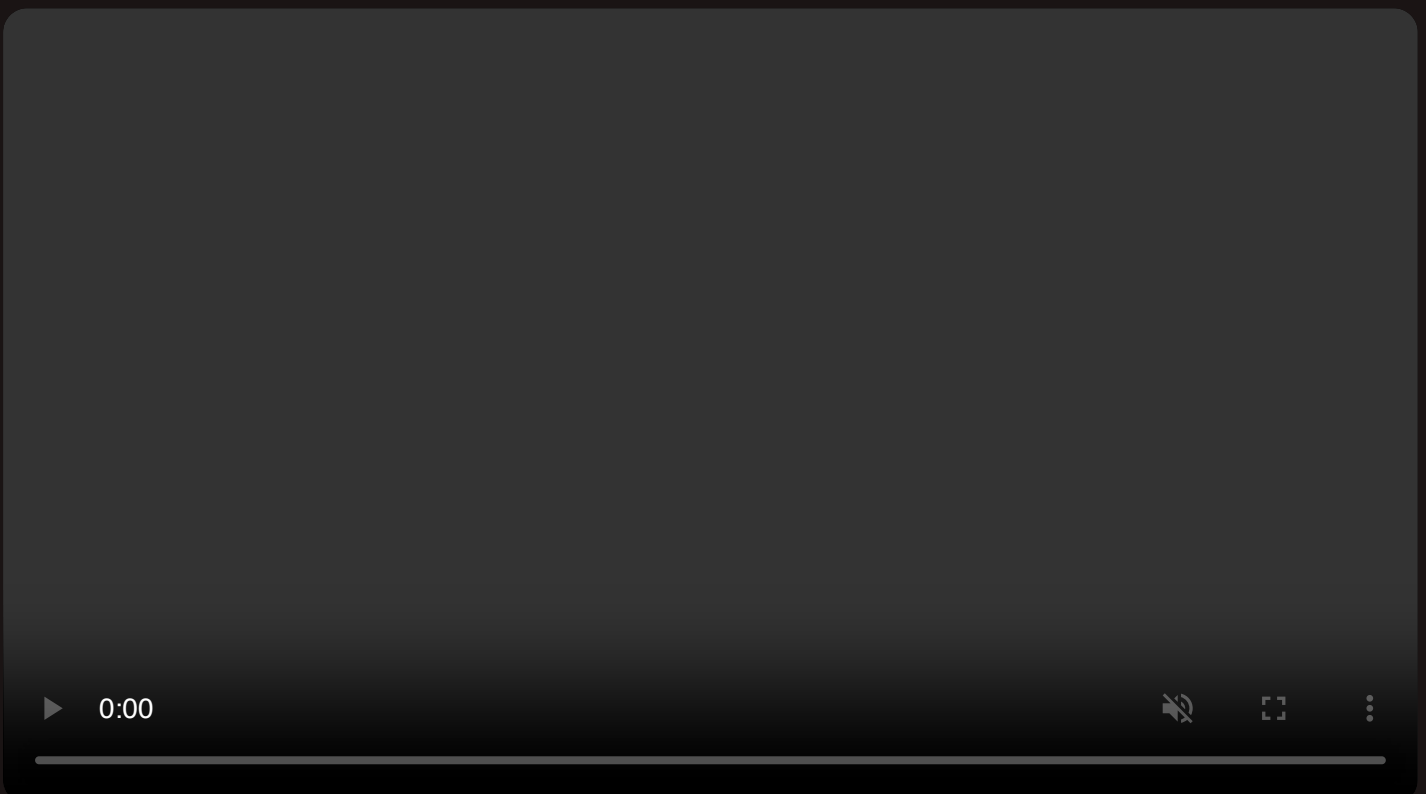
You can open files using the built-in UI in one of the following ways:

- ✦ [From a document record page](#)
- ✦ [From an account page](#)
- ✦ [Using the Nutrient file selector](#)

Opening a file from a document record page

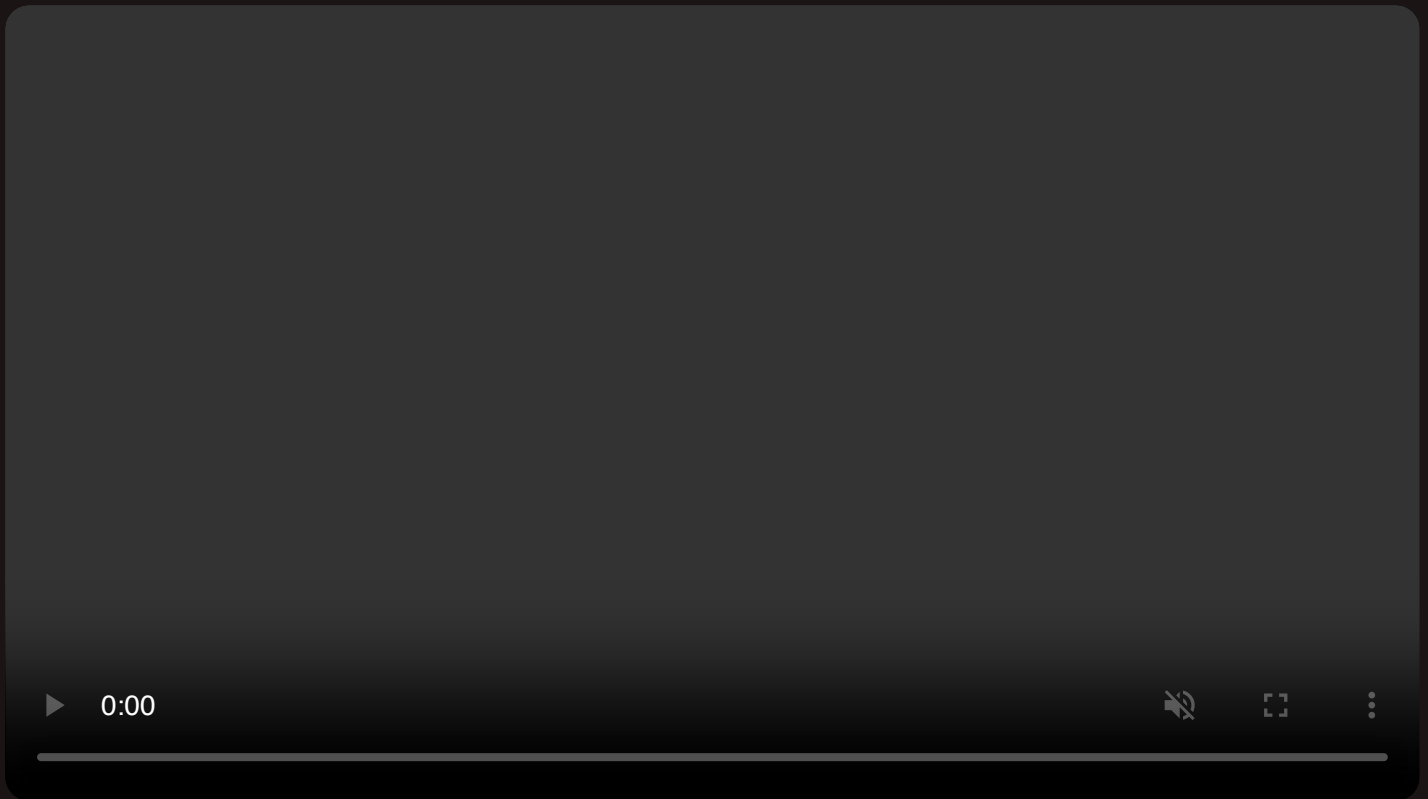
To add the Nutrient button to document record pages, follow the steps outlined below. You only need to do this once.

- 1 In Salesforce, go to **Files**.
- 2 To the right of one of the files in the list, click the down chevron, and click **View File Details**.
- 3 In the top-right corner, click **Setup > Edit Page**.
- 4 In the list of components on the left, find `pspdfkitEditButtonSolution`, and drag it to the appropriate place on the page.
- 5 Optional: Select the color of the button and determine whether it opens in a new tab.
- 6 Click **Save**.



To open a file from a document record page, follow these steps:

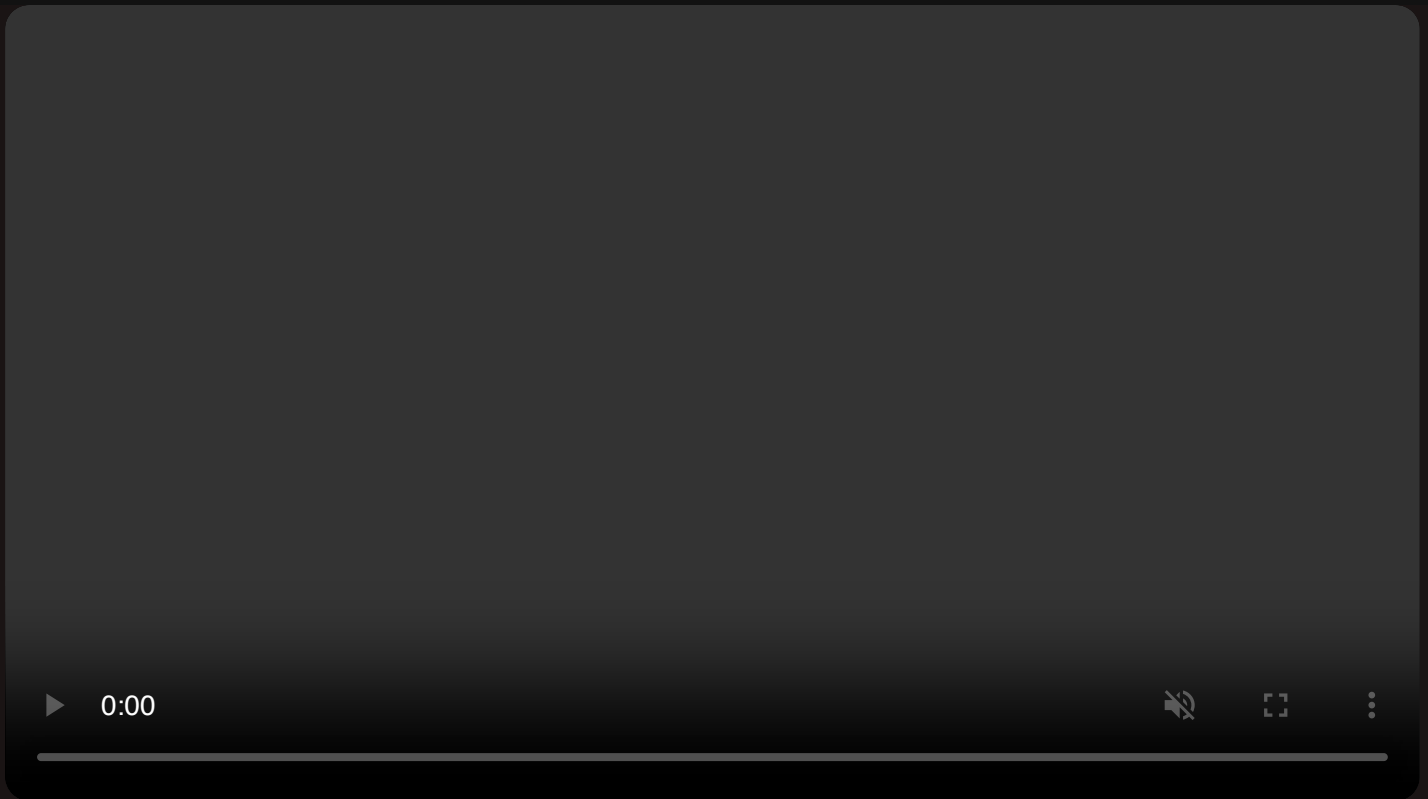
- 1 In Salesforce, go to **Files**.
- 2 To the right of one of the files in the list, click the down chevron, and click **View File Details**.
- 3 Click **Edit File with PSPDFKit**.



Opening a file from an account page

To add the Nutrient button to account pages, follow the steps outlined below. You only need to do this once.

- 1 In Salesforce, go to **Objects and Fields > Object Manager**.
- 2 Click **Account**.
- 3 In the left navigation panel, click **Page Layouts**.
- 4 In the list, click **Account Layout**.
- 5 Click **Mobile & Lightning Actions**.
- 6 Drag **Edit files with PSPDFKit** to the **Salesforce Mobile and Lightning Experience Actions** area.
- 7 Click **Save**.



To open a file from an account page, follow these steps:

- 1 In Salesforce, go to **Accounts**.
- 2 Click one of the accounts in the list.
- 3 Click **Edit Files with PSPDFKit**.
- 4 Find the file in the list and click **Edit with PSPDFKit**.

Opening a file using the Nutrient file selector

Using the Nutrient file selector, you can open files from your local machine or Salesforce.

To open a file using the Nutrient file selector, follow these steps:

- 1 Ensure you're logged in as a user authorized to use Nutrient.
- 2 In the top-right corner, open the App Launcher.
- 3 Search for and select **PSPDFKit**.

- 1 Click **browse** to upload local PDF files, or open a file from Salesforce.

Opening files programmatically

Programmatically, you can open files in one of the following ways:

- ✦ [From Salesforce](#)
- ✦ [From an external URL](#)

Opening files programmatically from Salesforce

Before continuing, perform all of the following actions:

- ✦ If you've deployed Nutrient Salesforce SDK to an existing project, ensure you added the file selector to your project.
- ✦ Ensure you're logged in to Salesforce as a user authorized to use Nutrient.

To open files from Salesforce programmatically, follow these steps.

- 1 In Salesforce, click the **Files** tab.
- 2 Right-click the file in the list, and click **Copy Link Address**.

3 The URL in the copied text is similar to

```
https://YOUR_SALESFORCE_ORG.lightning.force.com/lightning/r/ContentDocument/DOCUMENT_ID/view
```

Use the `DOCUMENT_ID` part of the URL.

4 In your text editor, open the `PSPDFKit_InitNutrientViewer.page` Visualforce page within the `force-app/main/default/pages` folder, and then paste the following within the `script` tag. Replace `DOCUMENT_ID` with the document ID:

```
<script type="text/javascript">
  ... openSalesforceFile(DOCUMENT_ID)
</script>
```



5 Run the following command in the terminal to start the Salesforce authentication process:

```
sfdx update
sfdx org:login:web --alias mySalesforceOrg --instance-url https://login.salesforce.com
```



6 In the browser window that opens, log in to your Salesforce organization and authorize the Salesforce CLI.

7 In the terminal, run the following command from the Nutrient Salesforce SDK project's root folder:

```
sfdx force:source:deploy -x manifest/package.xml
```



As a result, the selected document automatically opens when the Nutrient file selector page loads.

Opening files programmatically from an external URL

To open files from an external URL programmatically, follow these steps.

- 1 Check the `Access-Control-Allow-Origin` response header from the server that serves the file, and ensure that Salesforce is allowed to load the file.
- 2 In your text editor, paste the following to the Visualforce page where you want the file to open. Replace `https://example.com/source.pdf` with the URL of the file you want to open:

```
<script type="text/javascript">
  NutrientViewer.load({
    baseUrl: "https://cdn.cloud.pspdfkit.com/pspdfkit-web@<% product_version%>",
    container: "#pspdfkit",
    document: "https://example.com/source.pdf",
    disableWebAssemblyStreaming: true,
    productId: NutrientViewer.ProductId.Salesforce
  })
</script>
```

- 3 Run the following command in the terminal to start the Salesforce authentication process:

About

```
sfdx update
sfdx org:login:web --alias mySalesforceOrg --instance-url https://login.salesforce.com
```

- 4 In the browser window that opens, log in to your Salesforce organization and authorize the Salesforce CLI.
- 5 In the terminal, run the following command from the Nutrient Salesforce SDK project's root folder:

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Was this helpful?

✓ YES

✗ NO
