

# Release Notes

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Enhanced Attachment v3.0

## Release Features

### Features Overview

Enhanced Attachment v3.0 introduces support for using Salesforce Files. Administrator

Out of the box the application continues to support Account, Lead, Contact, and Opportunity objects. With the addition of user defined objects, customers can link other standard or custom objects to support Enhanced Attachments. Categories of different attachments can now be rolled-up to the parent record by creating a custom number field on the parent object. Track how many attachments of each category as been attached to a parent record.

### User-defined Linked Objects

In addition to the Lead, Account, Contact, and Opportunity objects support has been extended to other standard or custom objects. Linking can be accomplished by adding additional custom Lookup fields to the Enhanced Attachment object for the specified object that needs to be linked. Once the Lookup field has been created, the object can be linked via the Attachment Settings tab. Consult the Enhanced Attachment Admin Guide for full details.

### Attachment Category Rollup

Rollup counts of each attachment category to a parent record is supported now. Create a custom number field on any of the four out-of-box supported object or on any user-defined linked object and assign a category type to that field in the Attachment Settings tab. Once configured the app will update the field with the total amount of attachments of that category each time a new file is attached to the parent record. Additional customer defined validation rules or processes can be defined based on the changes of the number field. Consult the Enhanced Attachment Admin Guide for full details.

### Notes Support

Notes can be created now along with attachments. Categories can be assigned the same way attachments are created. Click on the New Attachment / Note button and select either the Attachment or Note option in the new drop-down to create one type of record or another. See the User Guide for more details.



## Additional Updates

### Attachment Type field deprecated

For reporting the Attachment Type picklist field has been deprecated as category values are not derived from picklist values. For reporting use the new Attachment Category text field when reporting on attachments. Attachment Type and Attachment Category will store the same values when users update the category of an Enhanced Attachment record.