

Release Notes

Enhanced Attachment v4.0

Release Features

Features Overview

Enhanced Attachment v3.5 introduces support for user requested features including assignment categories to different objects and ability to select a subcategory for record attachments. Other features include differentiation between Attachment and note categories.

Subcategory support for attachments

Subcategories can now be added from the Attachment Category settings tab. There is a new **Sub-Category** field when viewing, editing, and creating new Enhanced Attachment records. Selecting the main Attachment Category field will automatically populate the picklist for Subcategory. Please refer to the Admin and User Guides for more details for this new feature.

Assign categories to different objects

Main attachment categories can not be allocated to different Salesforce objects configured for Enhanced Attachment. This includes the four standard objects supported out-of-box (Lead, Account, Contact, and Opportunity) and any additional standard or custom objects that have been linked. Category assignments can be configured via the Attachment Category Settings tab. ***Note that any categories without an explicit object assignment will be available globally across all linked objects.***

Differentiate between Attachment and Note Categories

Categories can now be configured to be an attachment category or note category. Each type of category can be configured in the from the Attachment Category Settings tab. Use the View toggle button to switch between viewing / updating attachment and note categories. When creating a new Enhanced Attachment or Note, only categories of that specific will only display. If your Salesforce org is using the Notes capability of Enhanced Attachment please update from the Attachment Category Settings tab accordingly to prevent disruption in record creation.

Bug Fixes

File field name not populated after migrating standard Attachment object to Enhanced Attachment

Fixed issue where the File field was not populated with the file name from the standard Attachment object to Enhanced Attachment after migration via the Attachment Migration Tool.

Null Reference occurs when after encountering file size limit when encrypting a file.

After attempting to upload a file that is greater than 1MB in size with encryption option enabled, users receive a file size limit error for encryption. This is normal behavior, however, after changing to a file size that is under the 1MB limit a null reference error occurs. This has been fixed in version 3.5.

Invalid field error occurs after Enhanced Attachment record has been orphaned

When parent record of an Enhanced Attachment record has been deleted, the attachment record is in an orphan status (handled by the scheduled attachment cleanup jobs). An invalid field error occurs when attempting to view an orphaned record due to page attempting to access the deleted parent record. References to the parent record have been removed when viewing orphaned record which fixes the issue.

Additional Update

Prevent deletion of Enhanced Attachment records

You can prevent deletion of attachment records by using the category roll-up count feature in conjunction with validation rules against the attachment parent object. For example, to prevent opportunity attachments with category as "Sales Contract" from being deleted, configure a rollup setting in the Attachment Settings tab. Create a validation rule afterwards that does not allow the roll-up count field to be updated to zero.

For more information on how to configure a category roll-up count, please review the admin guide:

<http://docs.adviceforce.fastmail.com.user.fm/Admin%20Guides/>

For an example of creating validation rules to prevent deletion please read this article:

<http://docs.adviceforce.fastmail.com.user.fm/API%20Guides/Preventing%20Edits%20and%20Deletions%20for%20%20Enhanced%20Attachment%20records.pdf>