

# Upgrade Guide

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Enhanced Attachment v4.0

## Preparing for installation

It is recommended that the latest release to be tested in a sandbox org before upgrading your production org to the version 3.5. Read through the release notes and admin guide to understand what are new changes in this version.

Before performing the upgrade to any org environment you will need to disable Orphan Attachment Cleanup and Attachment Migration jobs. After the app upgrade has been completed you can re-enable both jobs from the Attachment Settings tab.

Attachment Cleanup Settings

Next Scheduled Clean-up Run:  
Next Scheduled Migration Run:

Enable / Disable Orphan Cleanup

Inactive

Saved

Cleanup Frequency

Daily

Saved

Orphan Action

Mark

Enable / Disable Attachment Migration

Inactive

Saved

The following Enhanced Attachment Download Cleanup jobs will need to be deleted manually from the Scheduled Jobs page (Setup->Jobs->Scheduled Jobs).

Action	Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run	Type
<a href="#">Del</a>	Enhanced Attachment Download Cleanup 1	<a href="#">Chiu, Terence</a>	10/10/2018 1:47 PM		10/10/2018 2:00 PM	Scheduled Apex
<a href="#">Del</a>	Enhanced Attachment Download Cleanup 2	<a href="#">Chiu, Terence</a>	10/10/2018 1:47 PM		10/10/2018 2:15 PM	Scheduled Apex
<a href="#">Del</a>	Enhanced Attachment Download Cleanup 3	<a href="#">Chiu, Terence</a>	10/10/2018 1:47 PM		10/10/2018 2:30 PM	Scheduled Apex
<a href="#">Del</a>	Enhanced Attachment Download Cleanup 4	<a href="#">Chiu, Terence</a>	10/10/2018 1:47 PM		10/10/2018 2:45 PM	Scheduled Apex

## Upgrading the package

1) Navigate to the AppExchange website to Enhanced Attachment's app listing.

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DqDTIUA3>

2) Click on the Get It Now button.

3) Select the type of environment you want to install the package (Production or Sandbox)

4) If you already have the a previous version of the app installed in a production org **you should not be prompted for payment**. If you are prompted for that, do continue and contact support by emailing [support@adviceforce.com](mailto:support@adviceforce.com).

5) Continue following the prompts and complete the installation.

6) After the installation is complete re-enable the Orphan Clean and Attachment Migration jobs from the Attachment Settings tab.

7) Re-enable the Enhanced Attachment Download cleanup by setting the Enhanced Attachment Download Cleanup setting to No, saving the setting then updating the setting to Yes and re-saving.

8) Confirm that the following four jobs have been created under scheduled jobs.

Action	Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run	Type
<a href="#">Del</a>	Enhanced Attachment Download Cleanup 1	<a href="#">Chiu, Terence</a>	3/19/2018 11:40 AM	3/19/2018 3:00 PM	3/19/2018 4:00 PM	Scheduled Apex
<a href="#">Del</a>	Enhanced Attachment Download Cleanup 2	<a href="#">Chiu, Terence</a>	3/19/2018 11:40 AM	3/19/2018 2:15 PM	3/19/2018 3:15 PM	Scheduled Apex
<a href="#">Del</a>	Enhanced Attachment Download Cleanup 3	<a href="#">Chiu, Terence</a>	3/19/2018 11:40 AM	3/19/2018 2:30 PM	3/19/2018 3:30 PM	Scheduled Apex
<a href="#">Del</a>	Enhanced Attachment Download Cleanup 4	<a href="#">Chiu, Terence</a>	3/19/2018 11:40 AM	3/19/2018 2:45 PM	3/19/2018 3:45 PM	Scheduled Apex
<a href="#">Manage</a>   <a href="#">Del</a>	Filterable Attachment Migration	<a href="#">Chiu, Terence</a>	3/19/2018 2:07 PM		3/19/2018 11:00 PM	Scheduled Apex
<a href="#">Manage</a>   <a href="#">Del</a>	Orphan Attachment Cleanup	<a href="#">Chiu, Terence</a>	3/19/2018 2:07 PM		3/20/2018 1:00 AM	Scheduled Apex

9) Navigate to the Attachment Category Settings tab and click on Save Categories button without making any modification to the existing categories. This to update categories and prepare it for object category assignment. Not performing this step could result in categories not displaying when users view / edit / create Enhanced Attachment records.

Attachment Categories

Add Category
Delete Categories
Save Categories
View Note Categories

	CATEGORY NAME	ACTIVE	SUB-CATEGORIES	ASSIGNED OBJECTS
<input type="checkbox"/>	Sales Contract - Services	<input checked="" type="checkbox"/>	New Sub Category: <input style="width: 100%;" type="text"/> <div style="text-align: center; margin-top: 5px;"><span style="background-color: #0070c0; color: white; padding: 2px 10px; border-radius: 3px;">Add</span></div>	Account : <input type="checkbox"/> Lead : <input type="checkbox"/> Contact : <input type="checkbox"/> Opportunity : <input type="checkbox"/> Case : <input type="checkbox"/>
<input type="checkbox"/>	Sales Contract - Product	<input checked="" type="checkbox"/>	New Sub Category: <input style="width: 100%;" type="text"/>	Account : <input type="checkbox"/> Lead : <input type="checkbox"/> Contact : <input type="checkbox"/>