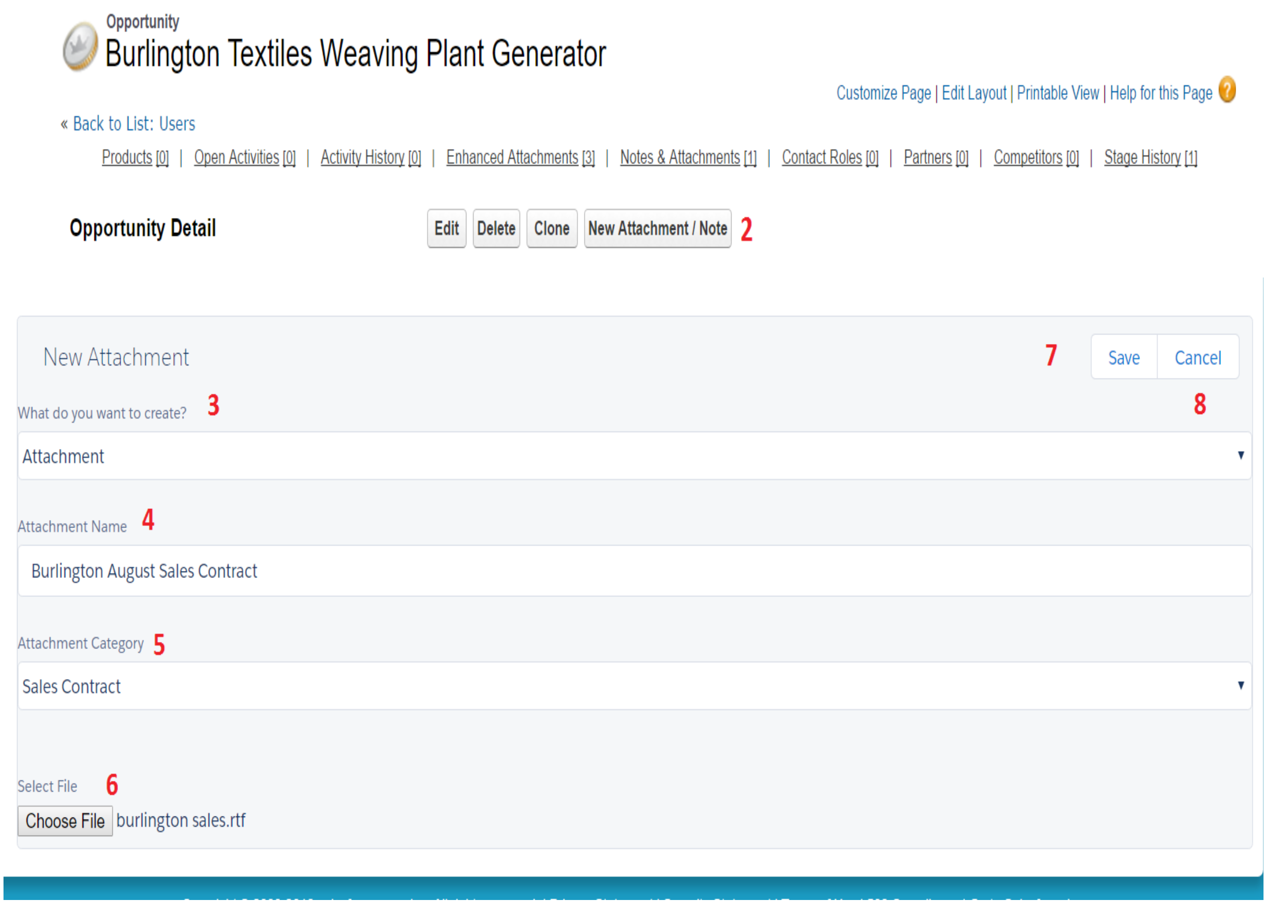
User Guide

Enhanced Attachment v2.0

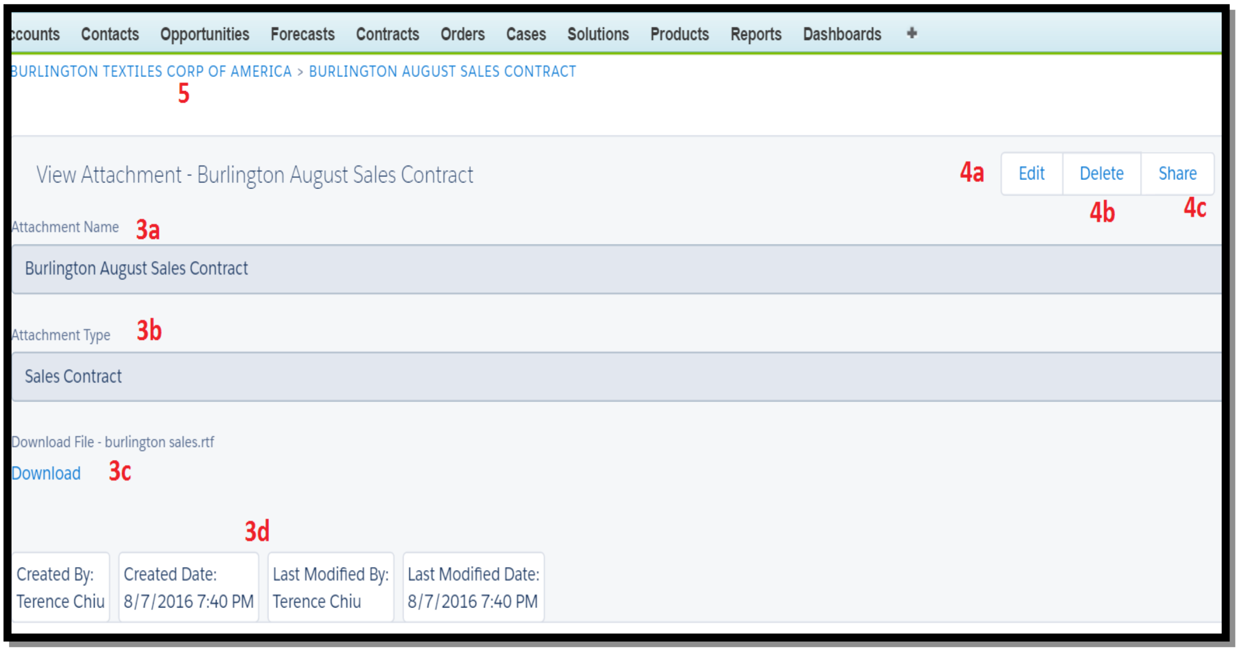
Adding New Attachment

1. Navigate to the parent record where the attachment needs to be added.
2. Click on the **New Attachment / Note** button at the top of the record detail page to navigate to the New Attachment page.
3. Select the **Attachment** option for the "What do you want to create?" Field.
4. Enter a label for the attachment.
5. Select an **Attachment Category** from the drop-down field.
6. Click on the Choose File button to select the file that needs to be attached.
7. Click on the **Save** button to complete the attachment.
8. To abort the action, click on the **Cancel** button.



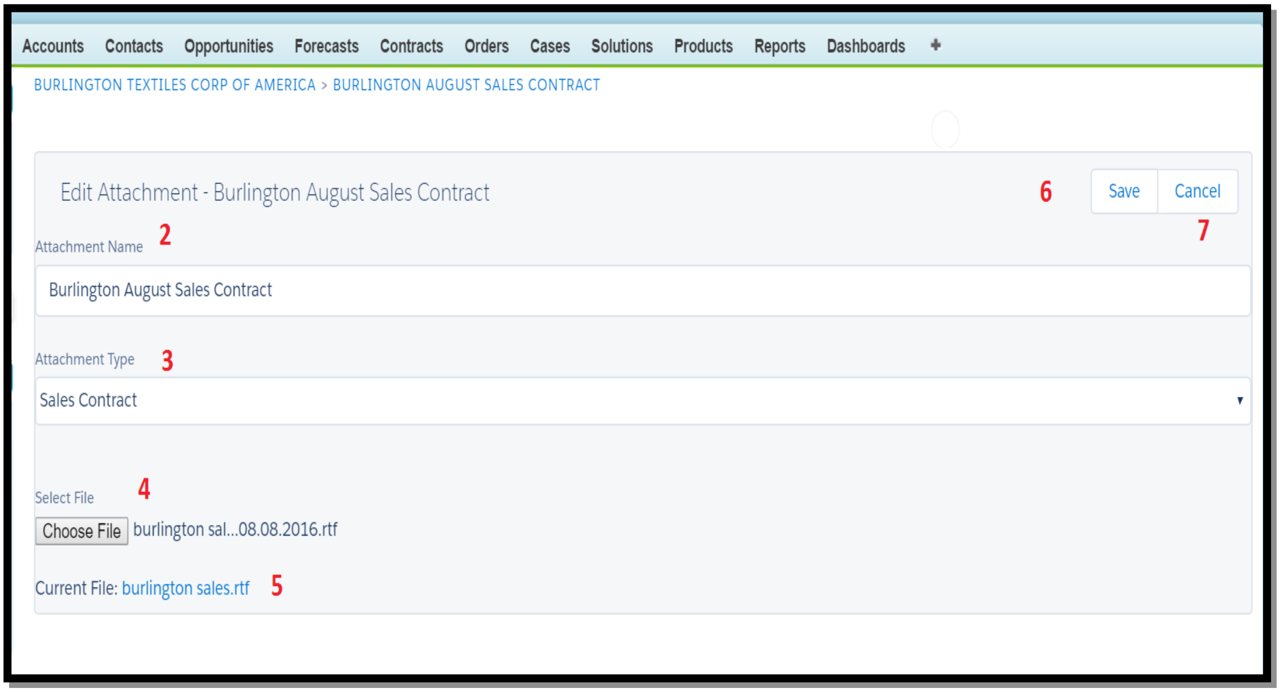
Viewing Attachments

1. Navigate to the parent record of the Filterable Attachment.
2. From the Filterable Attachment related list on the page, click on the link on the Filterable Attachment Number column to navigate to the attachment view page.
3. The View page consists of the following information:
    a. The label of the attachment.
    b. The type / category of the attachment.
    c. The file name and link to download the file.
    d. Create and Last Modified timestamps.
4. The following buttons are available:
    a. Edit – click here to edit the Filterable Attachment record.
    b. Delete – click here to delete the Filterable Attachment record.
    c. Share - if applicable based on sharing model the record can be shared with other users manually through this button.
5. The top of the page contains navigational link allowing you to go back to the parent record's details page.



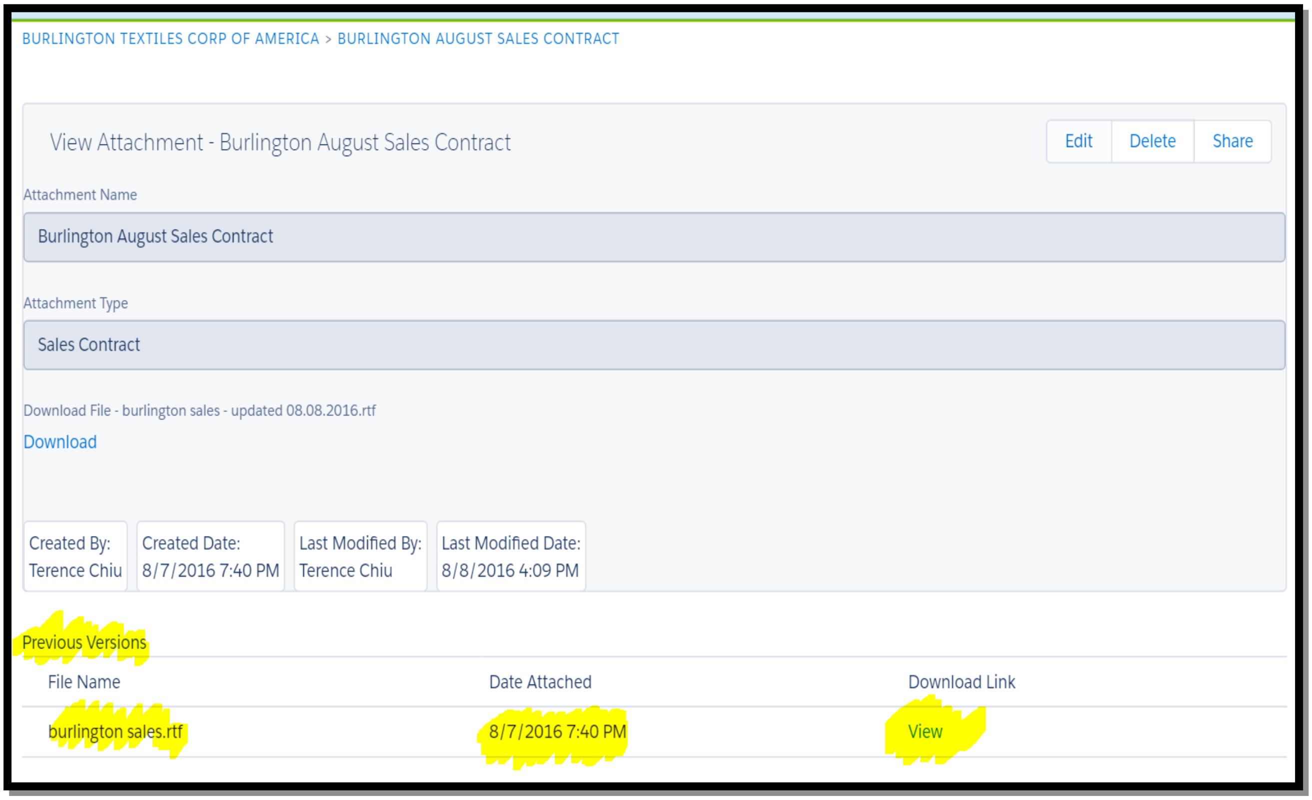
Editing Attachments

1. Click on the **Edit** button from the Filterable Attachment view page.
2. Update the label of the attachment if necessary.
3. Updated the type of the attachment if necessary.
4. If you have an updated version of the attached file, click on the Choose File button and select the new file.
5. The current attached file will also be displayed and be downloaded for viewing.
6. Click on the **Save** button when all field and file updates have been completed.
7. If you do not wish to continue with saving any changes click on the **Cancel** button.



Attachment Versions

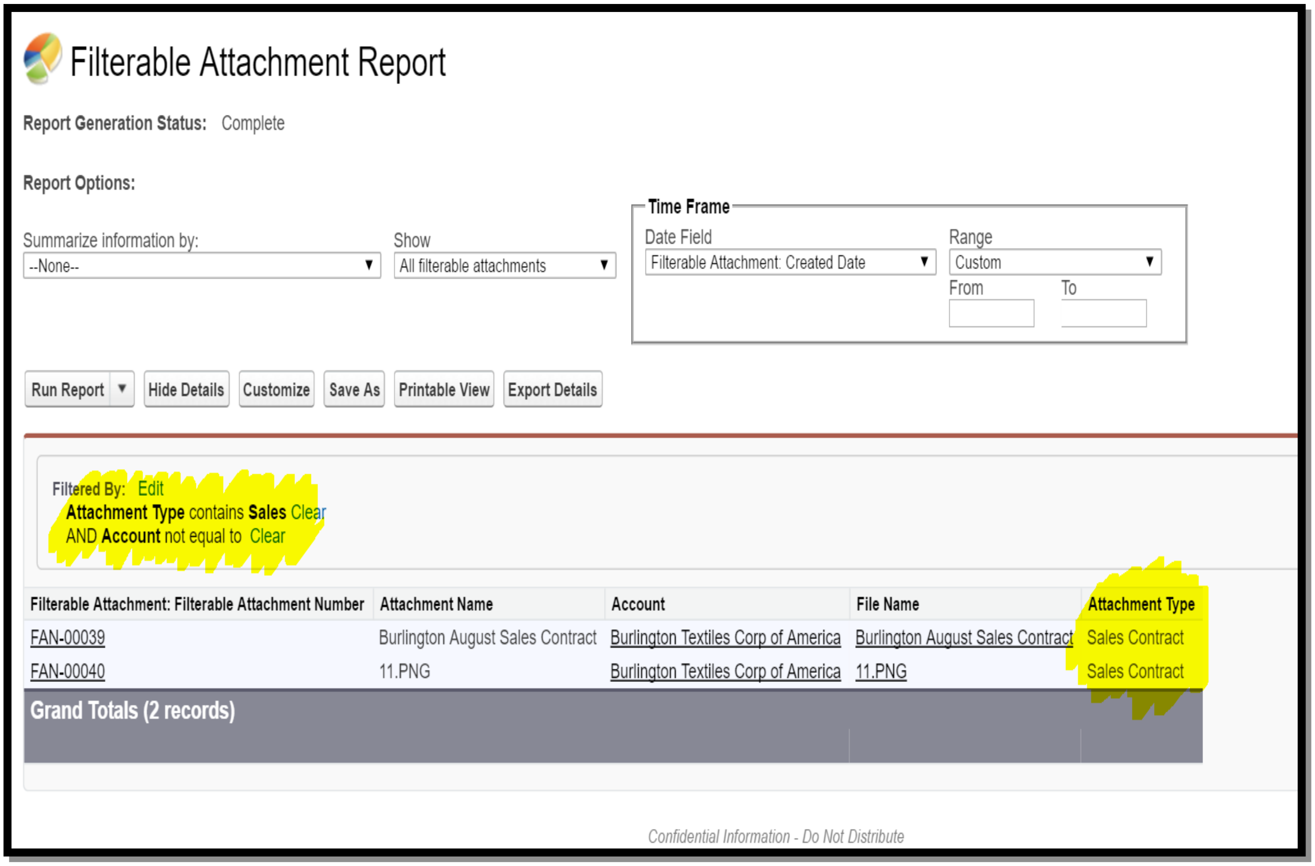
If an existing attachment record's file has been updated with a new file, previous versions can be viewed in the Filterable Attachment record's view page. The file name, the previous attached date, and a link to download the previous version of the file is displayed.



Reporting on Filterable Attachments

Reports can be created to identify specific types of attachments or attachments related to specific parent records such as Accounts or Opportunities.

In the below example, the report is pulling all Filterable Attachment where the Attachment Type contains "Sales" and is related to an Account record.



Adding Notes

To add notes to a record follow these steps.

1. Navigate to the record where the notes record needs to created.

2. Click on the **New Attachment / Note** button.
3. Select Notes for the "What do you want to create?" Field.
4. Enter a name for the Note.
5. Select a Note Category.
6. Enter notes in the Note Description field.
7. When ready click on the Save button.
8. Click Cancel to abort the action.