

User Guide

Enhanced Attachment v3.0

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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.

Opportunity
Burlington Textiles Weaving Plant Generator

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[Products \(0\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Enhanced Attachments \(3\)](#) | [Notes & Attachments \(1\)](#) | [Contact Roles \(0\)](#) | [Partners \(0\)](#) | [Competitors \(0\)](#) | [Stage History \(1\)](#)

Opportunity Detail [Edit](#) [Delete](#) [Clone](#) [New Attachment / Note](#) **2**

New Attachment 7 [Save](#) [Cancel](#)

What do you want to create? **3** 8

Attachment ▼

Attachment Name **4**

Burlington August Sales Contract

Attachment Category **5**

Sales Contract ▼

Select File **6**

[Choose File](#) burlington sales.rtf

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.

The screenshot shows a CRM interface with a navigation bar at the top containing links for Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, and Dashboards. Below the navigation bar, the breadcrumb path is 'BURLINGTON TEXTILES CORP OF AMERICA > BURLINGTON AUGUST SALES CONTRACT', with a red '5' next to it. The main content area displays 'View Attachment - Burlington August Sales Contract' with three buttons: 'Edit' (labeled 4a), 'Delete' (labeled 4b), and 'Share' (labeled 4c). Below this, the 'Attachment Name' is 'Burlington August Sales Contract' (labeled 3a). The 'Attachment Type' is 'Sales Contract' (labeled 3b). A 'Download File - burlington sales.rtf' section includes a 'Download' button (labeled 3c). At the bottom, a metadata table shows 'Created By: Terence Chiu', 'Created Date: 8/7/2016 7:40 PM', 'Last Modified By: Terence Chiu', and 'Last Modified Date: 8/7/2016 7:40 PM' (labeled 3d).

Created By:	Created Date:	Last Modified By:	Last Modified Date:
Terence Chiu	8/7/2016 7:40 PM	Terence Chiu	8/7/2016 7:40 PM

Editing Attachments

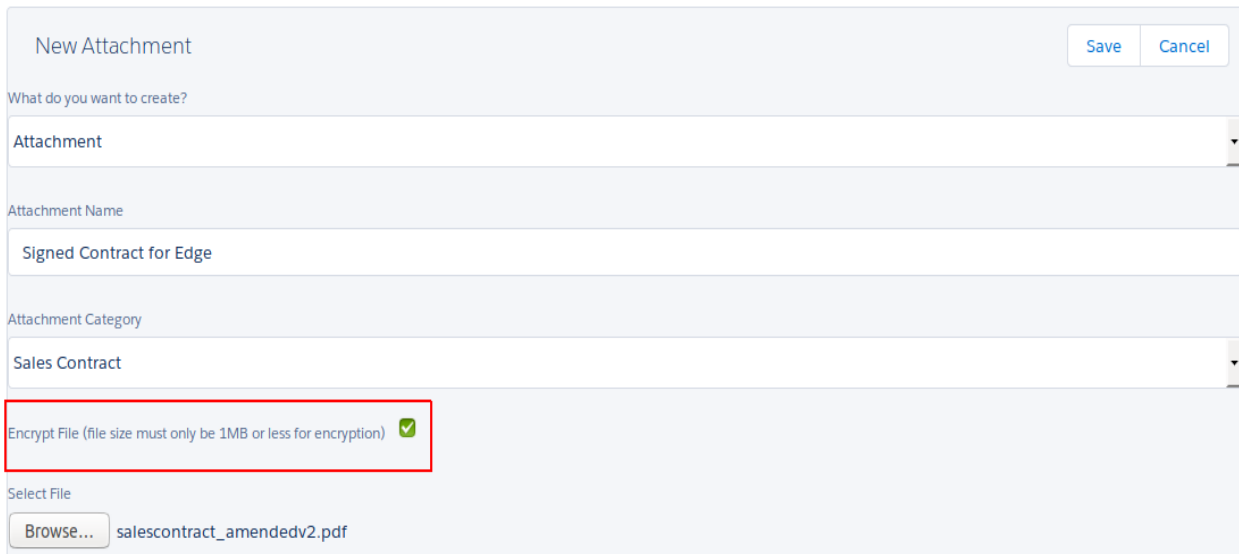
1. Click on the **Edit** button from the Filterable Attachment view page.
2. Update the label of the attachment if necessary.
3. Updated the type of the attachment if necessary.
4. If you have an updated version of the attached file, click on the Choose File button and select the new file.
5. The current 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.

The screenshot shows a web application interface for editing an attachment. At the top, there is a navigation bar with links: Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, Dashboards, and a plus sign. Below the navigation bar, the breadcrumb path is 'BURLINGTON TEXTILES CORP OF AMERICA > BURLINGTON AUGUST SALES CONTRACT'. The main content area is titled 'Edit Attachment - Burlington August Sales Contract' and includes a 'Save' button and a 'Cancel' button. The form contains the following fields:

- Attachment Name** (labeled with a red '2'): A text input field containing 'Burlington August Sales Contract'.
- Attachment Type** (labeled with a red '3'): A dropdown menu with 'Sales Contract' selected.
- Select File** (labeled with a red '4'): A 'Choose File' button next to the text 'burlington sal...08.08.2016.rtf'.
- Current File** (labeled with a red '5'): A text input field containing 'burlington sales.rtf'.

Encrypting Attachment Files

If your Salesforce administrator has turned on encryption in the Enhanced Attachment settings and your user account has been granted permission to encrypt files you will see the Encrypt File option when creating or editing an attachment. **Note that encryption only works for files with size 1 MB or less.** Once an attachment has been selected to be encrypted it will remain encrypted even if a new version of the file has been uploaded. To store the file without encryption create a new Enhanced Attachment record and do not select the encryption option.



The screenshot shows the 'New Attachment' form in Salesforce. The form includes the following fields and options:

- What do you want to create?**: Attachment
- Attachment Name**: Signed Contract for Edge
- Attachment Category**: Sales Contract
- Encrypt File (file size must only be 1MB or less for encryption)**: (This checkbox is highlighted with a red border in the image)
- Select File**: Browse... salescontract_amendedv2.pdf

Buttons for 'Save' and 'Cancel' are located in the top right corner of the form.

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.

BURLINGTON TEXTILES CORP OF AMERICA > BURLINGTON AUGUST SALES CONTRACT

View Attachment - Burlington August Sales Contract Edit Delete Share

Attachment Name
Burlington August Sales Contract

Attachment Type
Sales Contract

Download File - burlington sales - updated 08.08.2016.rtf
[Download](#)

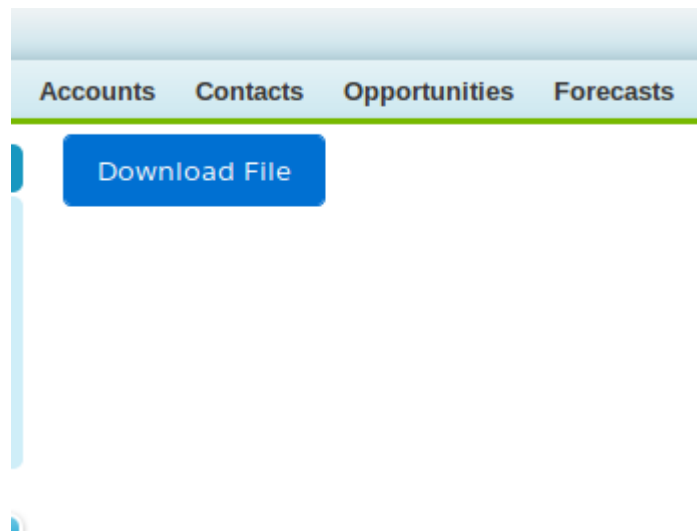
Created By: Terence Chiu	Created Date: 8/7/2016 7:40 PM	Last Modified By: Terence Chiu	Last Modified Date: 8/8/2016 4:09 PM
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Previous Versions

File Name	Date Attached	Download Link
burlington sales.rtf	8/7/2016 7:40 PM	View

Downloading Files


When downloading files for Enhanced Attachment and versions a new page will be opened and you will be presented with a Download File button. Click on the button to initiate the download.



Reporting on Enhanced 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.



Filterable Attachment Report

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field: Range:

From: To:

Filtered By: [Edit](#)
Attachment Type contains **Sales** [Clear](#)
AND **Account** not equal to **Clear**

Filterable Attachment: Filterable Attachment Number	Attachment Name	Account	File Name	Attachment Type
FAN-00039	Burlington August Sales Contract	Burlington Textiles Corp of America	Burlington August Sales Contract	Sales Contract
FAN-00040	11.PNG	Burlington Textiles Corp of America	11.PNG	Sales Contract
Grand Totals (2 records)				

Confidential Information - Do Not Distribute

Adding Notes

To add notes to a record follow these steps.

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

New Note Save Cancel

What do you want to create? **3**

Note ▼

Note Name **4**

Discovery Call

Note Category **5**

Phone Call ▼

Note Description **6**

Scheduled call to discuss requirements with customer. **7**