

# User Guide

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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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**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 web interface for viewing an attachment. At the top is a navigation bar with links: Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, Dashboards, and a plus icon. Below this is a breadcrumb trail: BURLINGTON TEXTILES CORP OF AMERICA > BURLINGTON AUGUST SALES CONTRACT, with a red '5' below it. The main content area has a title 'View Attachment - Burlington August Sales Contract' with a red '4a' next to it. To the right of the title are three buttons: 'Edit' (labeled 4b), 'Delete' (labeled 4c), and 'Share' (labeled 4c). Below the title is a section for 'Attachment Name' (labeled 3a) with the value 'Burlington August Sales Contract'. This is followed by a section for 'Attachment Type' (labeled 3b) with the value 'Sales Contract'. Below that is a section for 'Download File - burlington sales.rtf' with a 'Download' link (labeled 3c). At the bottom is a section for metadata (labeled 3d) with four fields: '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'.

Accounts	Contacts	Opportunities	Forecasts	Contracts	Orders	Cases	Solutions	Products	Reports	Dashboards	+			
BURLINGTON TEXTILES CORP OF AMERICA > BURLINGTON AUGUST SALES CONTRACT														
5														
View Attachment - Burlington August Sales Contract										4a	Edit	Delete	Share	
Attachment Name										3a	4b			4c
Burlington August Sales Contract														
Attachment Type										3b				
Sales Contract														
Download File - burlington sales.rtf														
Download										3c				
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, a navigation bar contains links: Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, Dashboards, and a plus icon. Below this, a breadcrumb trail reads 'BURLINGTON TEXTILES CORP OF AMERICA > BURLINGTON AUGUST SALES CONTRACT'. The main form is titled 'Edit Attachment - Burlington August Sales Contract' and includes a red number '6' and 'Save' and 'Cancel' buttons. The form has three main sections: 1. 'Attachment Name' with a red number '2' and a text input field containing 'Burlington August Sales Contract'. 2. 'Attachment Type' with a red number '3' and a dropdown menu showing 'Sales Contract'. 3. 'Select File' with a red number '4', a 'Choose File' button, and a text input field containing 'burlington sal...08.08.2016.rtf'. At the bottom, it shows 'Current File: burlington sales.rtf' with a red number '5'.

## 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.

New Attachment Save Cancel

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) ☒

Select File

Browse... salescontract\_amendedv2.pdf

## **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

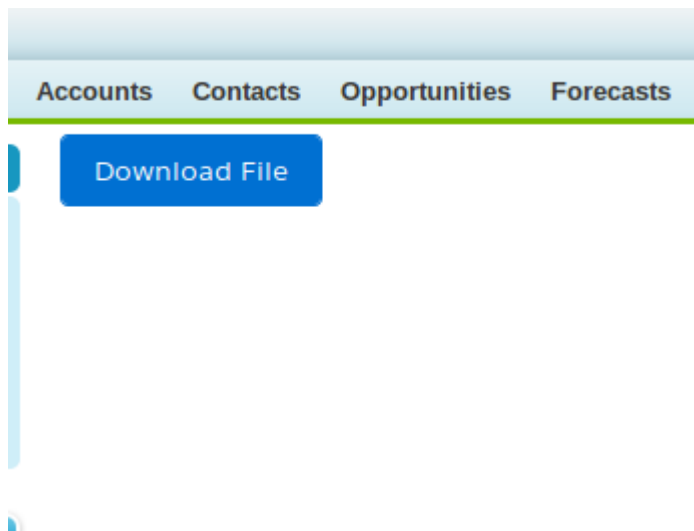
Last Modified Date:  
8/8/2016 4:09 PM

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: --None-- Show All filterable attachments

**Time Frame**  
Date Field: Filterable Attachment: Created Date Range: Custom  
From:  To:

Run Report Hide Details Customize Save As Printable View Export Details

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
<a href="#">FAN-00039</a>	Burlington August Sales Contract	<a href="#">Burlington Textiles Corp of America</a>	<a href="#">Burlington August Sales Contract</a>	Sales Contract
<a href="#">FAN-00040</a>	11.PNG	<a href="#">Burlington Textiles Corp of America</a>	<a href="#">11.PNG</a>	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.

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New Note

SaveCancel

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