

# User Guide

---

Enhanced Attachment v4.0

## **Table of Contents**

<b>Adding New Attachment</b>	<b>3</b>
<b>Viewing Attachments</b>	<b>4</b>
<b>Editing Attachments</b>	<b>5</b>
<b>Encrypting Attachment Files</b>	<b>6</b>
<b>Attachment Versions</b>	<b>7</b>
<b>Downloading Files</b>	<b>8</b>
<b>Reporting on Enhanced Attachments</b>	<b>9</b>
<b>Adding Notes</b>	<b>10</b>

## 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. Select a Subcategory (if applicable).
7. Click on the Choose File button to select the file that needs to be attached.
8. Click on the **Save** button to complete the attachment.
9. To abort the action, click on the **Cancel** button.

Opportunity  
Burlington Textiles Weaving Plant Generator

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Users

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

Save Cancel

What do you want to create? 3 8 9

Attachment

Attachment Name 4

Burlington - Signed Contract

Attachment Category 5

Sales Contract

Attachment Sub-Category 6

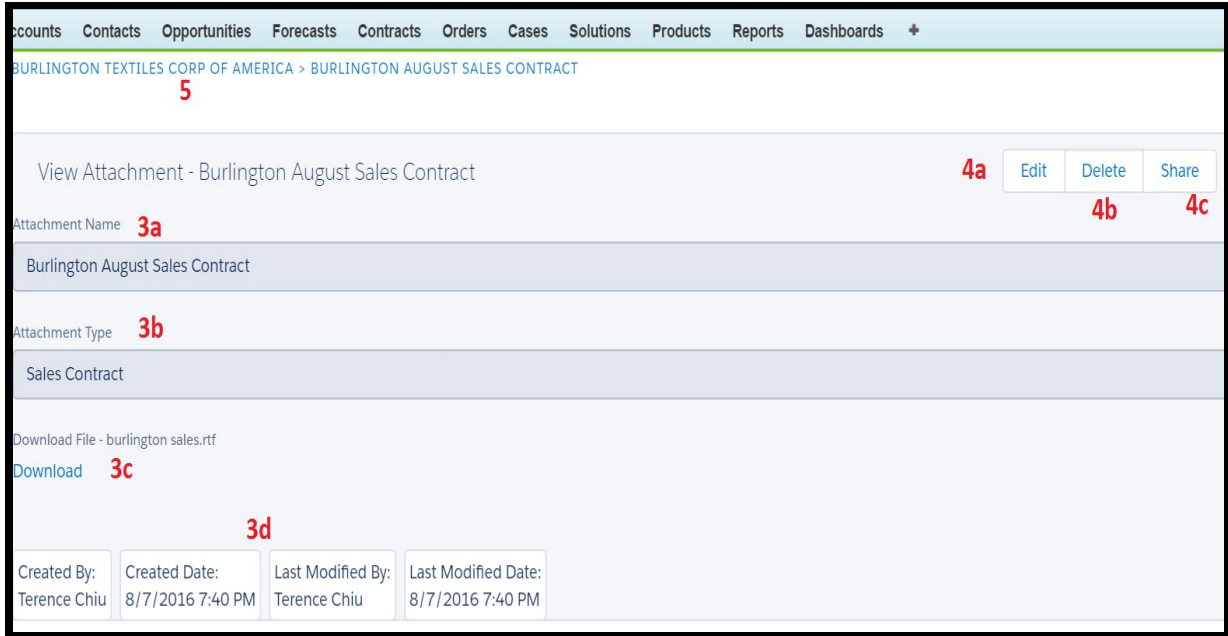
Product

Select File 7

Choose File sales\_contract\_v3.pdf

## 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 details page.



## Editing Attachments

1. Click on the **Edit** button from the Enhanced Attachment view page.
2. Update the label of the attachment if necessary.
3. Updated the category and subcategory 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.

Edit Attachment - Burlington - Signed Contract 6 Save Cancel

Attachment Name 2 7

Burlington - Signed Contract

Attachment Category 3

Sales Contract

Attachment Sub- Category 3

Product

Select File 4

Choose File No file chosen

Current File: sales\_contract\_v3.pdf 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.

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](#)

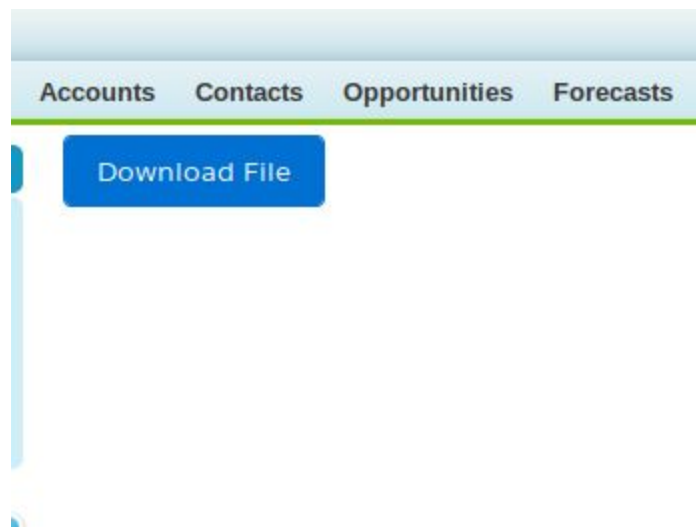
Created By: Terence Chiu	Created Date: 8/7/2016 7:40 PM	Last Modified By: Terence Chiu	Last Modified Date: 8/8/2016 4:09 PM
-----------------------------	-----------------------------------	-----------------------------------	---

Previous Versions

File Name	Date Attached	Download Link
burlington sales.rtf	8/7/2016 7:40 PM	<a href="#">View</a>

## 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 category / subcategory of attachments or attachments related to specific parent records such as Accounts or Opportunities. Reports can also be created for Notes as well by filtering for records where "Is Note" equals True.

In the below example, the report is pulling all Enhanced Attachment records where the Attachment Category contains "Sales" for all Opportunities.

## Enhanced Attachment with Opportunity Report

Report Generation Status: Complete

Report Options:

Summarize information by:

Show

**Time Frame**

Date Field

Range

From  To

Run Report
Hide Details
Customize
Save As
Printable View
Export Details

---

Filtered By: [Edit](#)  
**Is Note** equals **False** [Clear](#)  
**AND Attachment Category** contains **Sales** [Clear](#)

Grouped By:   
 Sorted By:

Enhanced Attachment: Filterable Attachment Number	Attachment Name	Attachment Category	Sub Category	File
<input type="checkbox"/> Opportunity: Opportunity Name: <a href="#">Burlington Textiles Weaving Plant Generator</a> (5 records)				
<a href="#">FAN-172126</a>	salesforce contract	Sales Contract	-	attjobs.png
<a href="#">FAN-172130</a>	Edge SOW	Sales Contract	-	sw-sw.txt
<a href="#">FAN-172129</a>	Edge Signed Sales	Sales Contract	-	attsettings_enc.png
<a href="#">FAN-172132</a>	Burlington New Business Contract - Final	Sales Contract	-	sales_contract_v3.pdf
<a href="#">FAN-180021</a>	Burlington - Signed Contract	Sales Contract	Product	sales_contract_v3.pdf
<input type="checkbox"/> Opportunity: Opportunity Name: <a href="#">Edge Emergency Generator</a> (2 records)				
<a href="#">FAN-160905</a>	Edge Signed Contract	Sales Contract	-	EAK1.png
<a href="#">FAN-169885</a>	Edge Addendum	Sales Contract	-	salescontract_amendedv2.pdf
<b>Grand Totals (7 records)</b>				

## 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. Select a Note Subcategory (if applicable).
7. Enter notes in the Note Description field.
8. When ready click on the Save button.
9. Click Cancel to abort the action.

The screenshot shows a 'New Note' form with the following fields and callouts:

- What do you want to create?** (Callout 3): A dropdown menu with 'Note' selected.
- Note Name** (Callout 4): A text input field containing 'Call with Burlington IT Director'.
- Note Category** (Callout 5): A dropdown menu with 'Call Log' selected.
- Note Sub-Category** (Callout 6): A dropdown menu with 'sales call' selected.
- Note Description** (Callout 7): A text area containing the text: 'Spoke with Linda from Burlington about IT widgets. She seem opened to the idea and saw a need for the widgets for several use cases.'
- Save** (Callout 8) and **Cancel** (Callout 9) buttons are located in the top right corner.