Customization and Enhancement Guide

Using This Document

This document provides information about using, installing and configuring FTP Attachments® application provided by Enzigma. It also describes how to use the application. Our application is user friendly and it is compatible with both the User Interface of Salesforce Classic and Lightning.

This document is generally used by following people:

- Salesforce Administrator
- IT Professional evaluating or installing FTP Attachments®

We assume that the person installing or customizing the application has basic knowledge of how to use Salesforce, customize Salesforce objects, fields and page layouts. We also assume that the user installing applications in their own servers has access to their IIS Server and has thorough knowledge of how IIS and ASP .Net 4.5 or above works together.

Browser compatibility: FTP Attachments® support Microsoft Edge, Firefox 30.x+,Chrome 30.x+ , Safari.

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1. Overview

Using FTP Attachments® you can store your files (attachments) on your own Storage Server without any built-in maximum size limit. It also saves your Salesforce storage costs because your files are stored on your own Storage Server where you can have as much storage as you want. Usability wise it is very similar to Standard Salesforce attachments. Users can attach files to any Salesforce Standard or Custom objects. Many Salesforce users are not using file attachments extensively because of storage limitations, but because of this option of unlimited storage now you can take full advantage of attachments.

Additionally, FTP Attachments® is lightning compatible. You can create Salesforce reports on your attachment information or view some standard attachment reports which are also included.

FTP Attachments® not only saves your cost of Salesforce Storage, but also gives you full control of your valuable data. FTP Attachments® has many advanced features like which extensions should be allowed, versioning, audit information and organizing attachments on your Storage server. Different Storage Servers that FTP Attachments® supports are FTP Server, SFTP Server, Local Hard disk of the Application Server and Amazon S3.

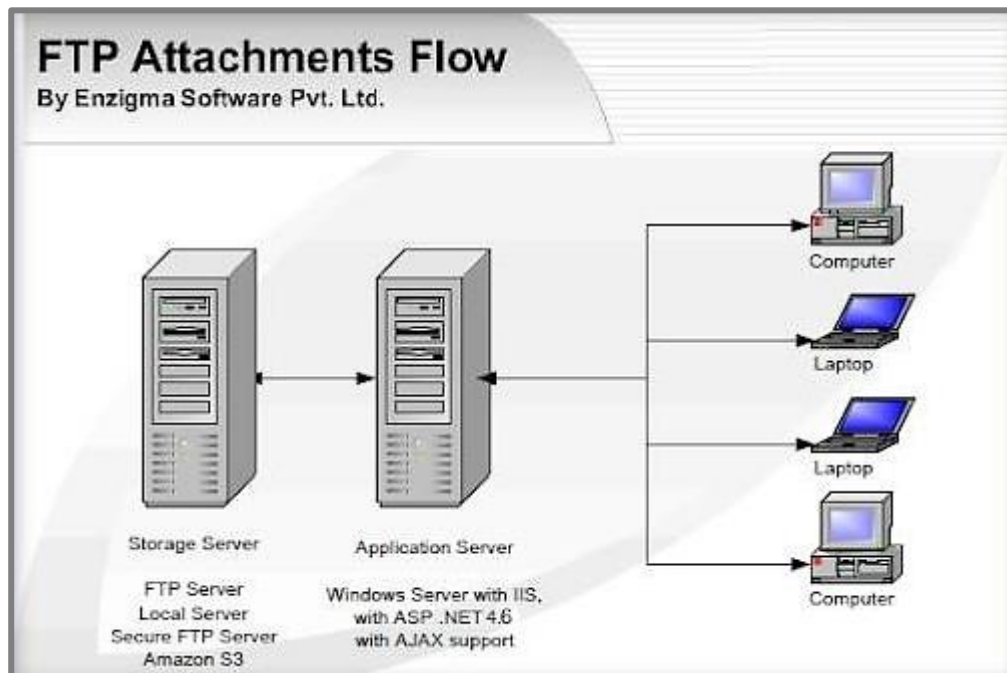## 1.1. FTP Attachments® Data flow

Figure 1 .1 FTP Attachments® Flow Diagram

When user uploads an attachment using FTP Attachments® , the attachment first gets uploaded from user's machine to the Application Server and then from the Application Server attachment is uploaded to the Storage Server. When any user views an attachment using FTP Attachments® which is stored on Storage Server, the attachment is first downloaded to the Application Server from the Storage Server and, then downloaded from the Application Server to end user's machine.

This way end user does not have direct access to the Storage Server at any point of time; this is an added layer of security. Salesforce users can view only attachments to which they have access rights as per Salesforce security configuration for FTP Attachments® object

1.2. Different Editions of FTP Attachments®

There are currently two editions of FTP Attachments® available:

FTP Attachments® Basic is a free application (for up to 30 users). It has the basic functionality of using your own Storage Server for storing your Salesforce attachments. This helps you to use attachments extensively with any Salesforce object without worrying about Salesforce space and backup your data easily.

FTP Attachments® Pro is additional features compared to Basic to maintain versions of your attachments so you can go back in history and get older versions of the document or file. Not only that, it allows you to view the access log (audit information) of attachments so at any point you know who is viewing or updating the attachments. Using FTP Attachments® Pro you can store your attachments in different folders in organized manner unlike Basic version where all the attachments are stored in the same folder. There are many additional features in FTP Attachments® Pro like not allowing some extensions, allow special characters in the file name etc.

FTP Attachments® Migrator is a tool to migrate your existing Salesforce attachments to FTP Attachments® Pro. This gives you huge cost savings as well as better control over your data. This tool works only with FTP Attachments® Pro.

FTP Attachments® Advance Migrator Advance Migrator tool is an automated tool used to migrate files from Salesforce storage server to the personal storage server. It is an add-on tool of the FTP Attachments application similar to classic Migrator tool with enhanced feature of automated migration.

Using this tool, files can be continuously migrated from Notes and Attachments to personal storage server. The record of migrated file can be found in Salesforce's FTP Attachments object.

Note: Migrator and Advance Migrator supports only files attached through Notes and Attachments in Salesforce Classic mode.

1.3. Different modes of FTP Attachments®

You can use this application in hosted mode or standalone mode.

Hosted Mode: In this mode, application is hosted with us (on app.ftpattachments.com) for a nominal charge. This is basically for those companies not having their own servers, and wants us to maintain the server for them.

Standalone Mode: In this mode, you can install the application on your own server, but for evaluation purpose you can use the application online from our website. Standalone mode has a great advantage for the companies which are very sensitive about storing or even passing their important data outside their company network.

Please note whether you use the application in Hosted or Standalone mode, the Storage server has to be your own Server. We do not provide hosting for the Storage Server for security reasons.

2. Install AppExchange Package & Sign Up with your Enzigma account

Before you can start using FTP Attachments® you need to create and link your Enzigma account with your Salesforce instance. To sign up for Enzigma account you need to first install FTP Attachments® package in your Salesforce instance.

Login to your Salesforce instance where package needs to be installed. Go to Setup -> View Installed Packages -> VisitAppExchange.

A) Installation of package in Salesforce

B) Installation of package in Salesforce

c) Installation of package in Salesforce

d) Installation of package in Salesforce

e) Installation of package in Salesforce

For Existing users:

If you are already linked with the Enzigma account, we suggest certain customization to be done in window settings for appropriate window size.

Below are the steps to be followed:

1. Go to the setup and type custom link in the quick find box .
2. Click on the custom links under "Home".
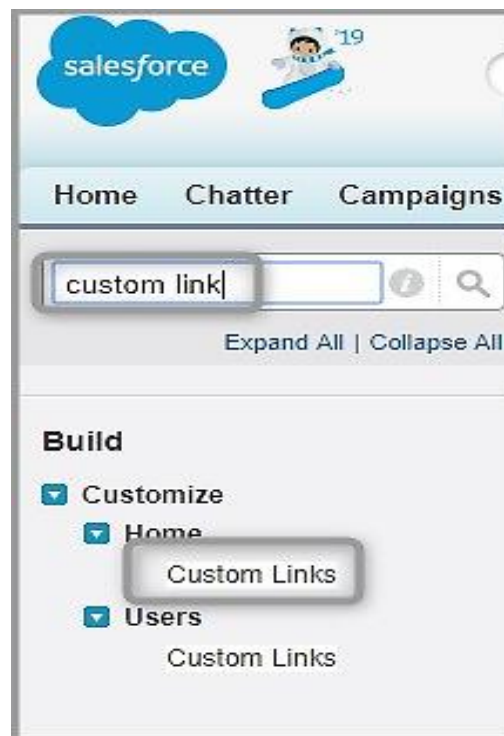
3. Click on FTP Attachments setup under Custom links.

4. Click on the "window open properties".

5. Change the width (in pixels) and Height (in pixels) to 1300 and 600 respectively. Click on save for reflecting the change made by you.

6. Change in width (in pixels) and Height (in pixels) will be reflecting in the custom link detail.

Now, when you click on Configure from installed package to navigate to the settings page, the page will be displayed in an appropriate window size.

3. Signup of Salesforce instance with FTP Attachments Application

Now, the FTP Attachments® package is successfully installed in your Salesforce instance. This package contains required custom objects, custom links and S-Controls. Once you are done with the installation of FTP Attachments® package from the AppExchange, follow the below steps:

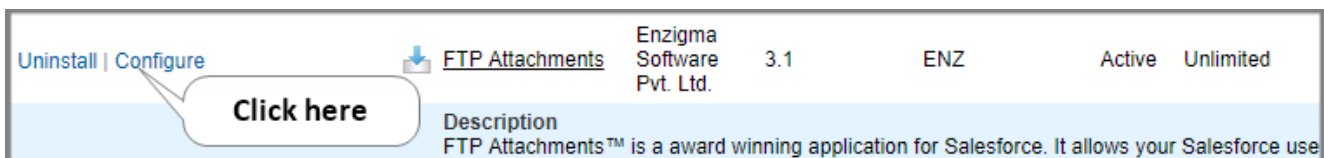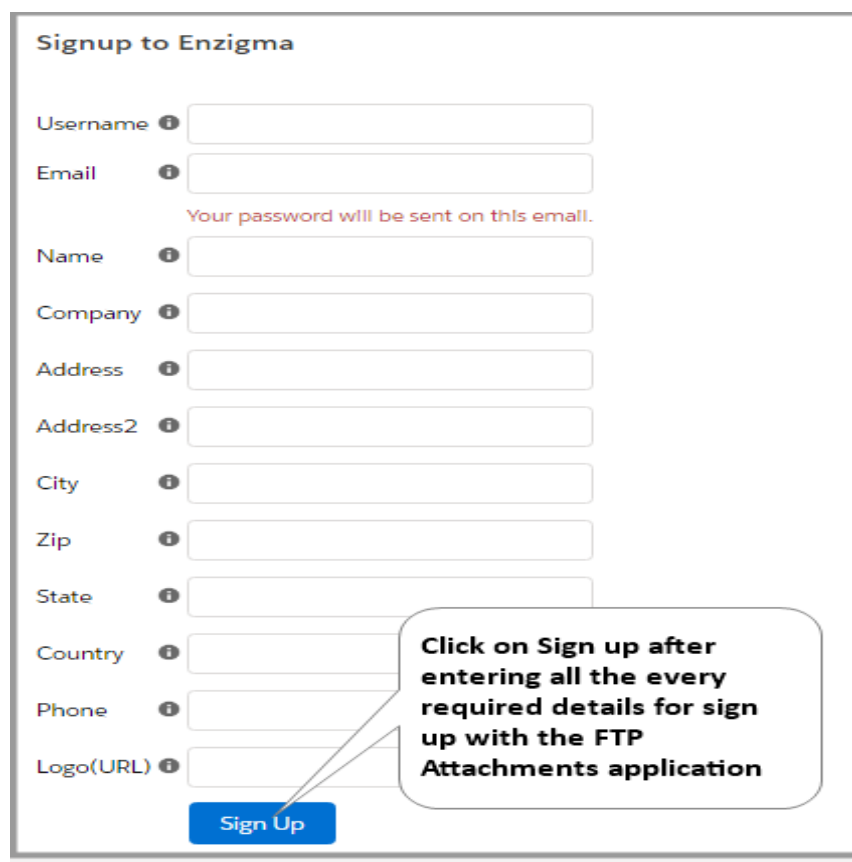**Step1:** Click on configure to link your Salesforce instance with the FTP Attachments Application. (Ref fig 3.1)

Figure 3.1 Installation and Sign Up

Step 2: Enter your details and click on Sign-up .(Ref fig 3.2)
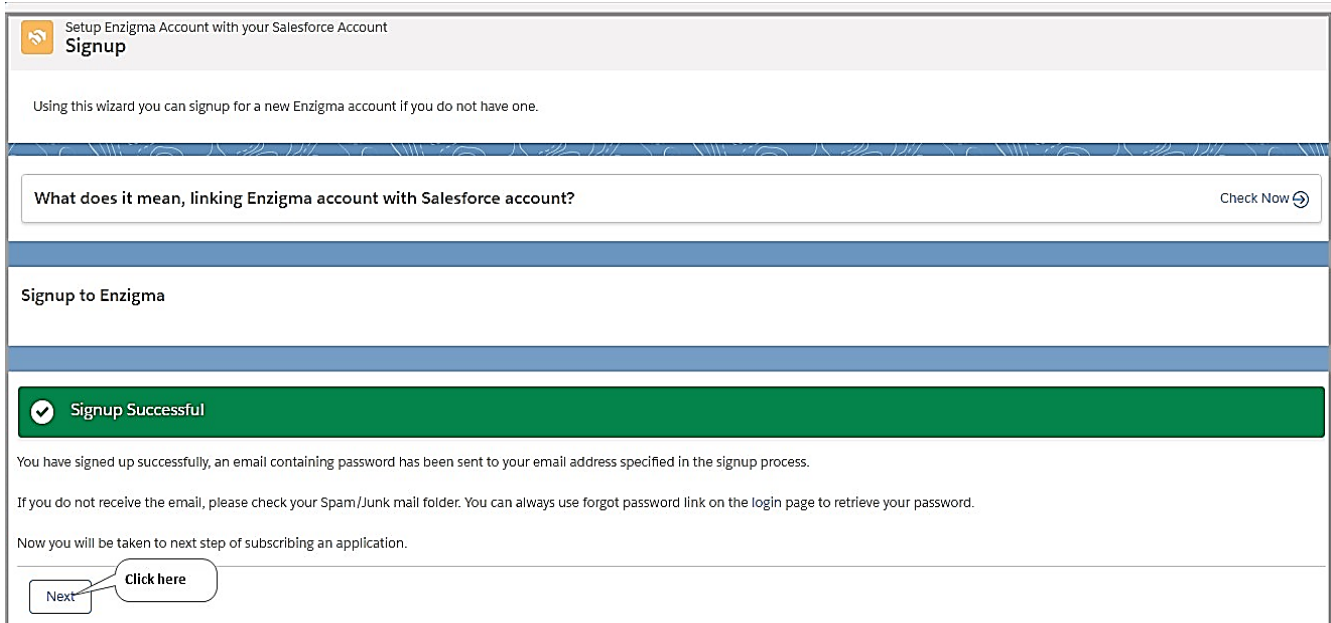
Figure 3.2 Installation and Sign Up
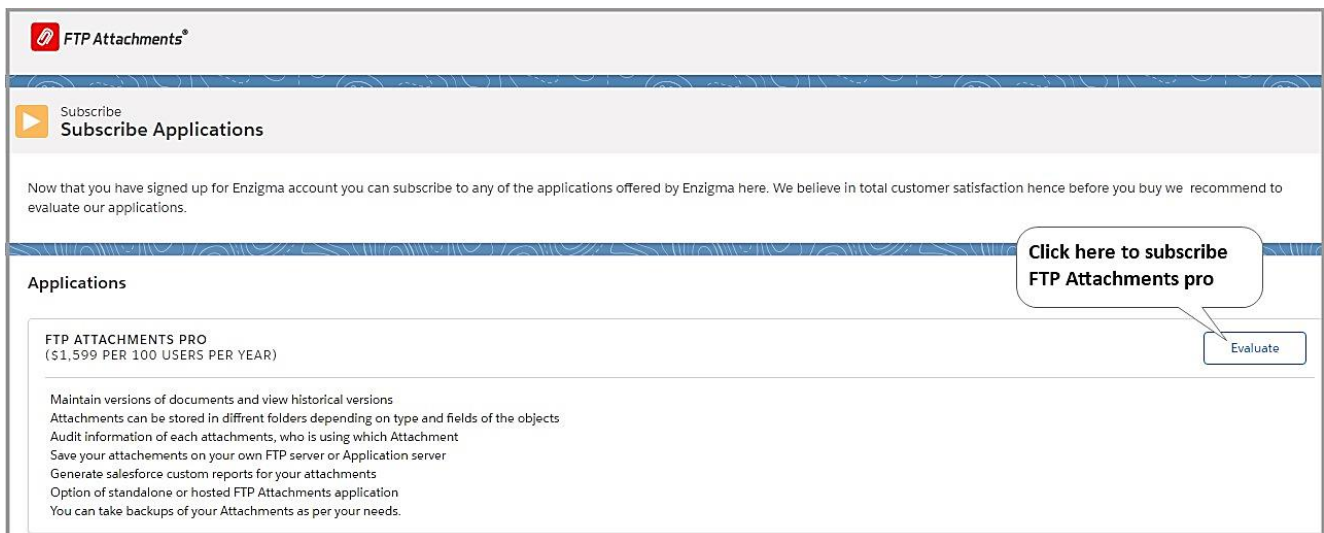
Step 3: Click on Next button on the signup successful page.(Ref fig 3.3) User gets redirected on Subscription page

Figure 3.3 Installation and Sign Up
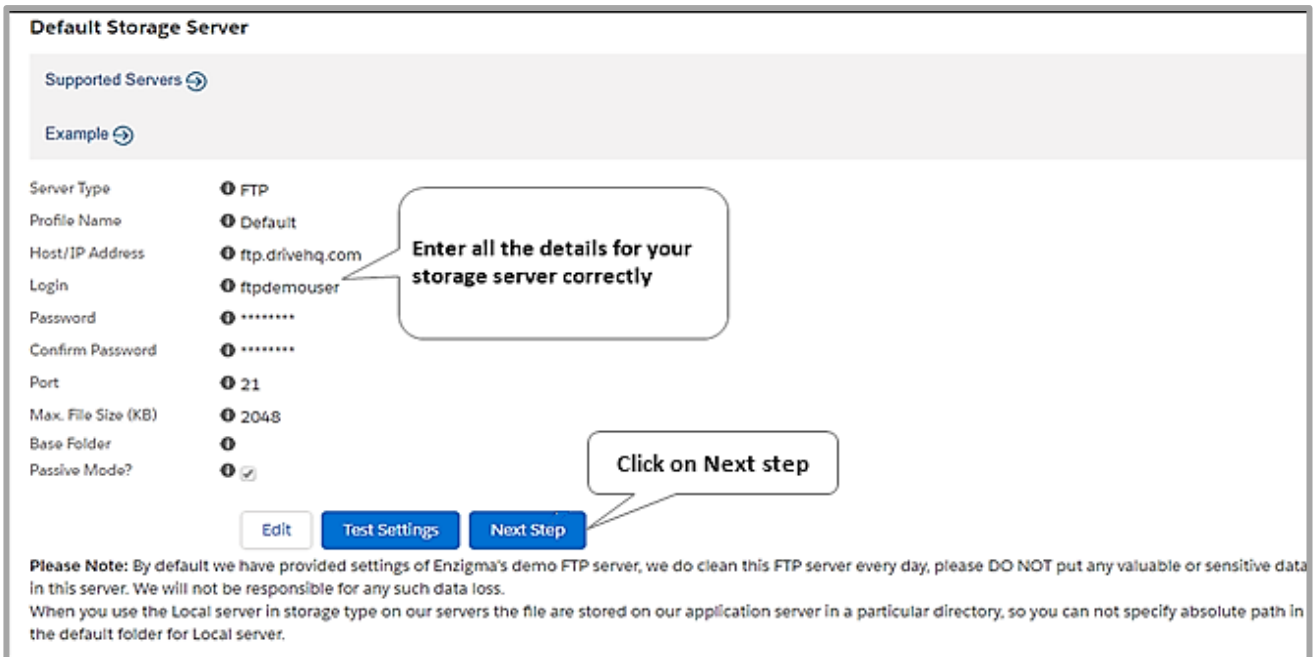
Step 4: On Subscription page, User can Subscribe/Evaluate enlisted Enzigma application by clicking on Subscribe/Evaluate button. Considering an example here we will subscribe FTP Attachments Pro. (Ref fig 3.4)

Figure 3.4 Installation and Sign Up

Step 5: Enter the details of your the Storage server where you want to store your data. (Ref fig 3.5)

Figure 3.5 Installation and Sign Up

Step6: Check your Inbox. You must have received an email for setting your portal password. Click on the "Click here" in the email. (Ref fig 3.6)
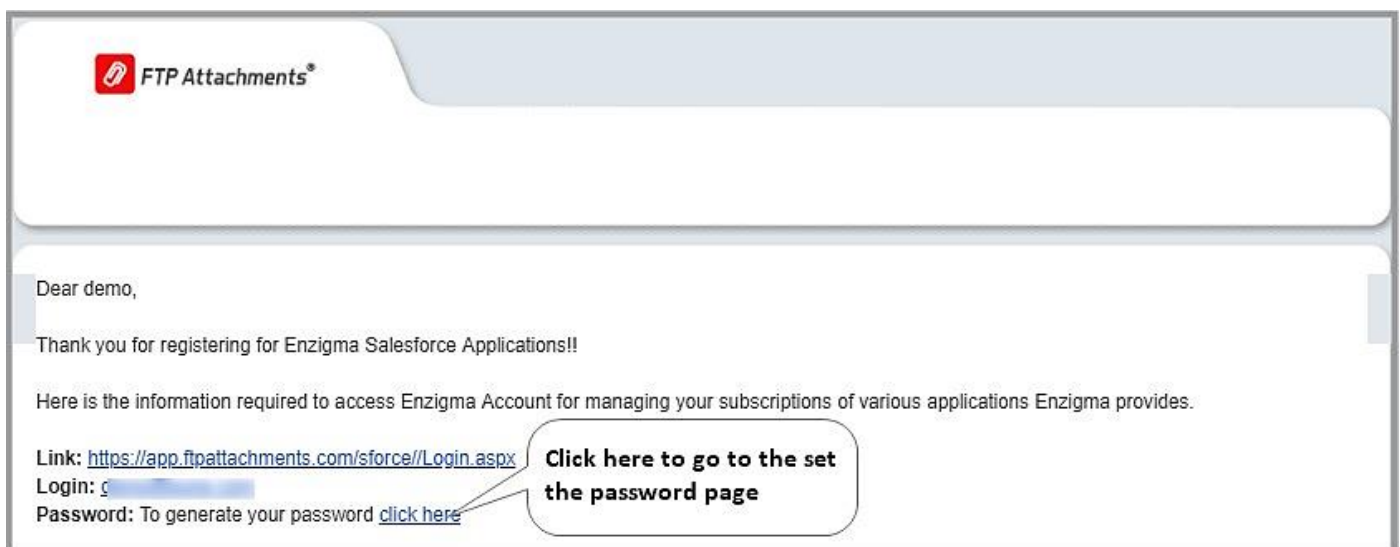
Figure 3.6 Installation and Sign Up

Step 7: Enter the New Password and Confirm Password. Then click on Save. (Ref fig 3.7) . Once you receive the Password Changed Successfully message, click on Back to Login button. You will get redirected to Login Page.
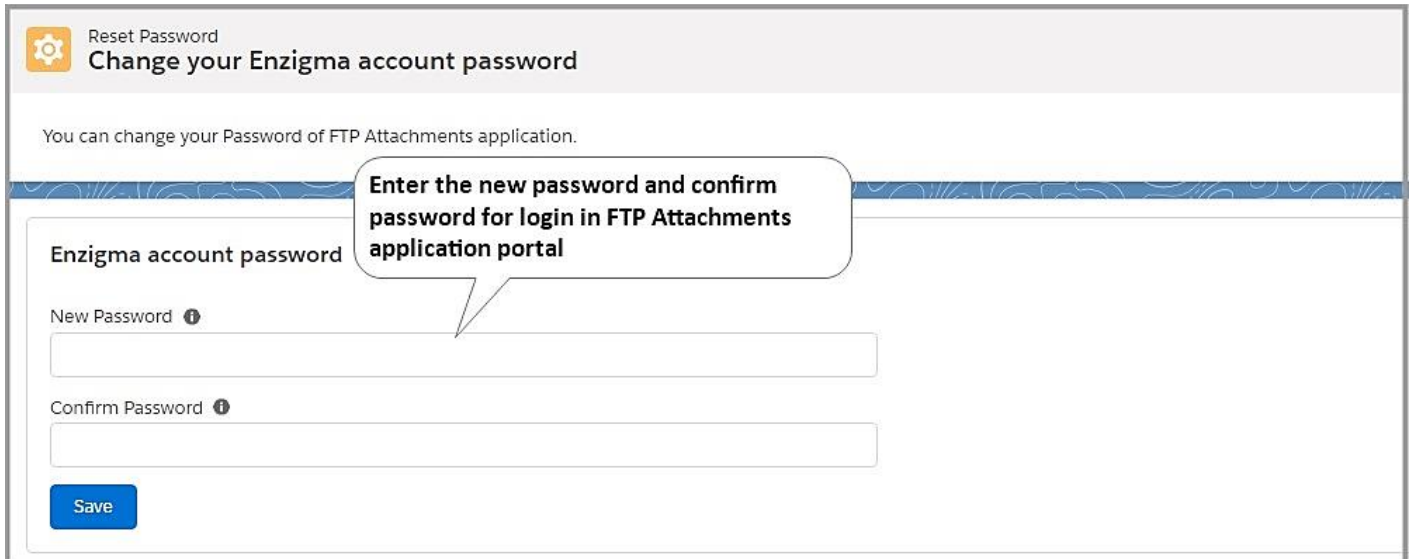
Figure 3.7 Installation and Sign Up

For Existing users:

If you are already linked with the Enzigma account, clicking on configure in Salesforce instance will redirect you to the Settings page.

On the Settings page, you will get an option to login the FTP Attachments Application in both Hosted and Standalone mode. This page also facilitates the user with our Add-on tool Advance migrator activation and customization.

As you click on Application Server Settings, FTP Attachments server base URL options will be displayed. There user will find two options available using which User can login to respective portal:

1.For Production URL (Hosted users):

Click on the dropdown of FTP Attachments Server Base URL and select the Production.

> A. Select the production and it will redirect you the **"app.ftpattachments.com/sforce/"**

B. Click on FTP Attachments Settings.

C. Click on Login to portal.
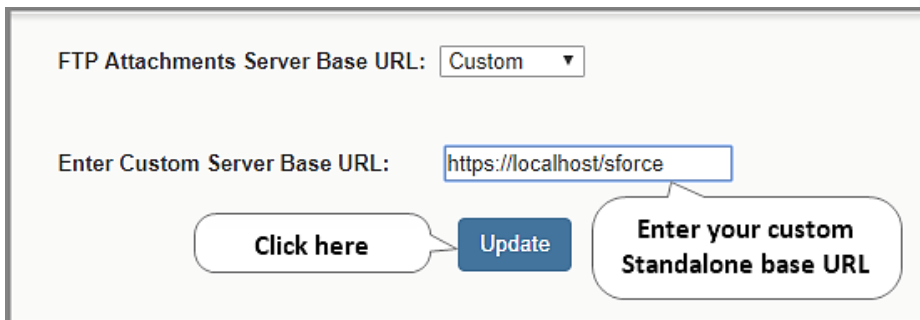
D. Click on Login to portal. Login page will be displayed.

2.For Standalone URL (Standalone users):

Click on the dropdown of FTP Attachments Server Base URL and select the Custom.

A. Select the Custom and enter the standalone server base URL, it will redirect you to the page of the URL given by you.

B. Click on FTP Attachments Settings.
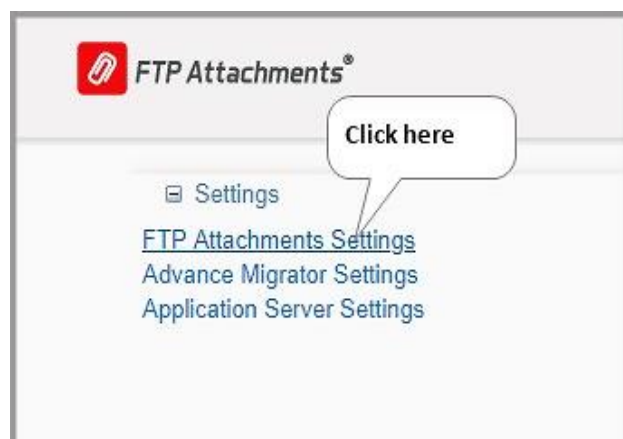
C. Click on Login to portal. Login page will be displayed here.

4.Dashboard

Dashboard: Our Dashboard is informative and user-friendly as you can see all the information you need to know about your FTP attachments account. Many information has been shown using pictorial graph and in the tabular form. (Ref fig-4.1) **Below are some information which will be displayed on the dashboard page:**
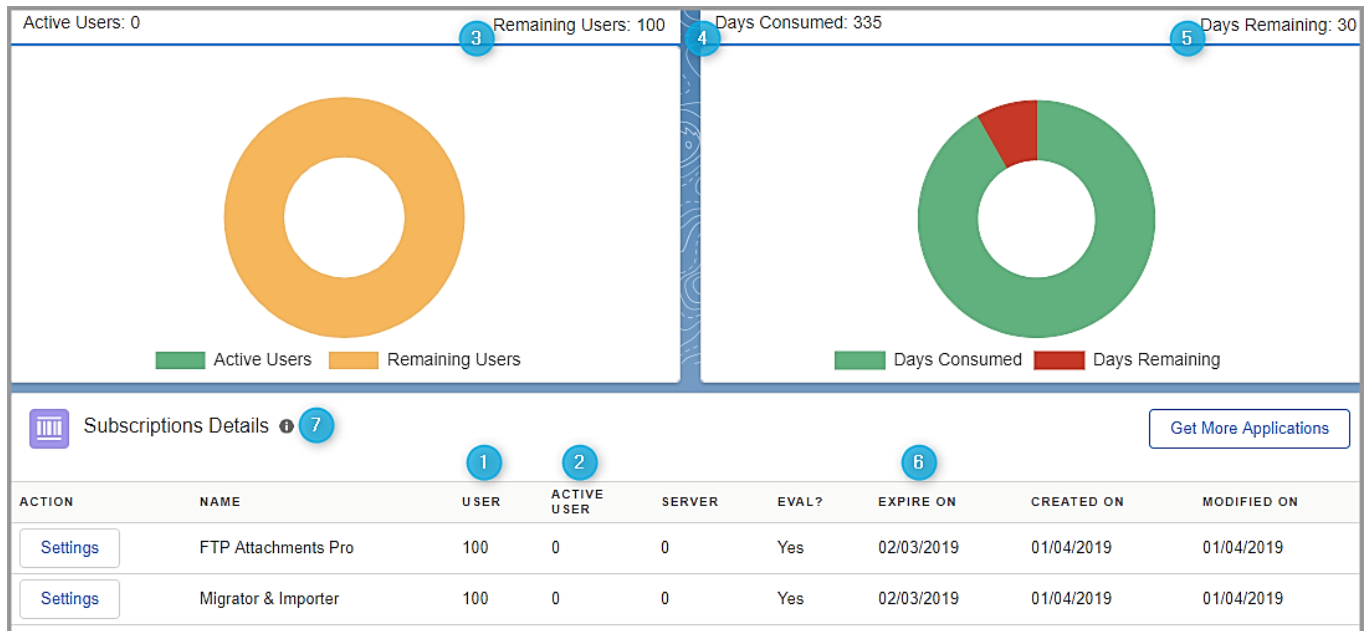
Figure 4.1 Dashboard

4.1.1. User: Number of users for whom the FTP Attachments license is available for your company.

4.1.2. Active Users: Number of Active users who are currently using FTP Attachments application.

4.1.3. Remaining users: Number of Remaining users among your licensed users.

4.1.4. Days Consumed: Number of days FTP Applications is being used.

4.1.5. **Days Remaining:** Days remaining for your License to get expired.

4.1.6. Expire On: License expiry date.

4.1.7. Salesforce ORG ID: You can see ORG ID linked with this account.

4.1.8. Subscription details: Details for all the applications you have subscribed under Enzigma account.

4.1.9. Vertical Navigation bar is there in the left side of the Dashboard. Here you can configure all the settings you need to configure on FTP portal side.

5. Custom Link Manager

The custom links which comes with FTP Attachments® managed package are read only and you cannot edit them. You can add them in page layouts which will redirect you to app.ftpattachments.com. So in case you want to configure the custom links for FTP Attachments® as per your requirement or want to make it redirect to your standalone server, you can use Custom Link Manager tool to create new custom links/buttons.

To use this tool, go to your Enzigma account and then go to menu Tools/Custom Link Manager. Generally, for evaluation purpose you can use the Buttons/links which comes with the FTP Attachments® package and they will work in standard manner. If you want to use FTP Attachments® for your Standalone mode, you can use this tool to create the links which points to your own
Standalone server. (Ref fig-5.1)

You can add different types of links/buttons using this tool:

1) **Attach**: This is the most frequently used type of link. You need to create a custom link for each object for which you want to use FTP Attachments® . You can create it of type link, detail button or related list button. When you create it of type link or detail button it is created under object you have chosen. If you create related list button it is created under FTP Attachments object layout which comes with FTP Attachments® package. Different parameters are to be used to create these links and they are explained in the later part of this documentation.

2) **View, Update, and Delete**: You need to create these links only once when you very first time install FTP Attachments® on your own server. Generally, these are of type detail buttons. If you are using Enzigma server, you can use the link which comes with the FTP Attachments® package. These links are created for FTP Attachments object which comes in the FTP Attachments® package. If you create these links for Standalone mode, you need to remove existing links from the FTP Attachments page layout and add these new ones.

3) **Send Email**: This is the link used to Send Emails. You need to create a custom link for each object through which you want to Send Email. You can create it of type link, detail button or related list button. When you create it of type link or detail button it is created under object you have chosen. If you create related list button it is created under FTP Attachments object which comes with FTP Attachments® package.

You can always create/edit links manually in Salesforce as per your needs, because this tool allows creating links only in some particular manner. e.g. if you want to use Send Email button on a related list other than FTP Attachments® , you will have to create that link directly into the Salesforce under that object. (Ref.Fig 5.1)

5.1.1   Link Action: Select action to be performed on standard or custom Salesforce object. For e.g.: Attach

5.1.2   Object: Select the object on which you want to perform action.

5.1.3   Base URL: Enter your server's base URL. e.g. https://www.yourdomain.com/sforce/ in Server field, if you are using Enzigma's server please enter https://ftpattachments.com/sforce/
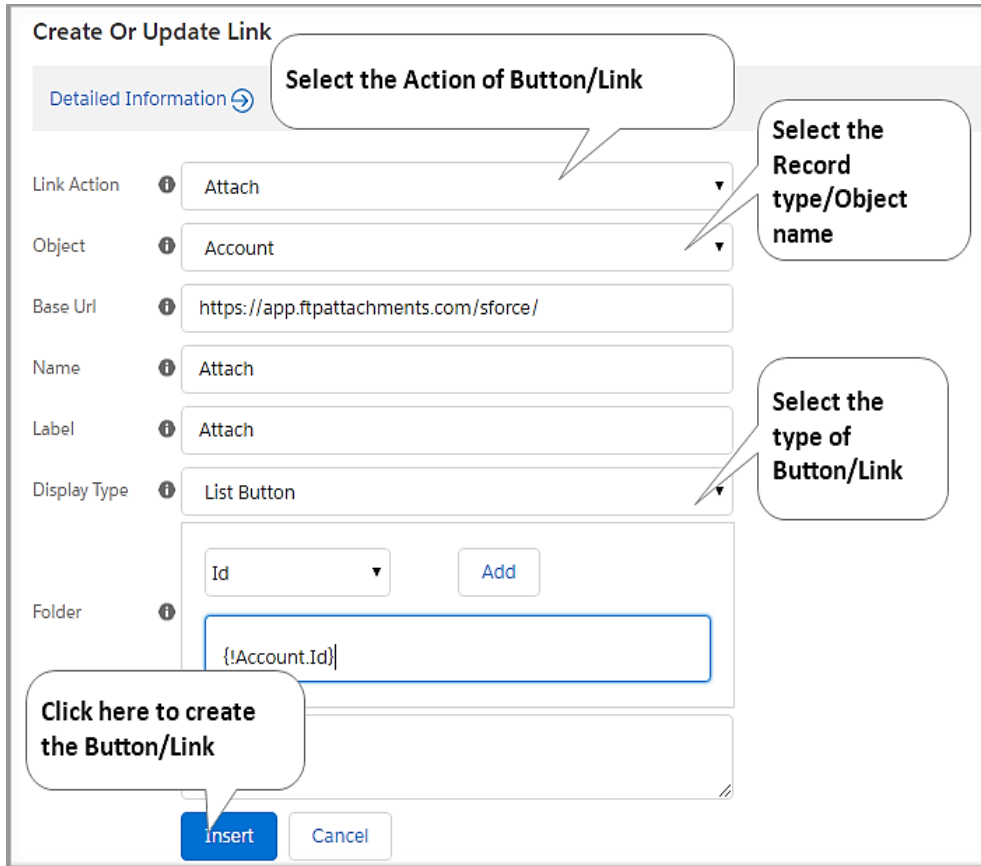
5.1.4   Name: The API name for the button or link used when referenced from a merge field.

5.1.5   Label: The label that displays on user pages for the custom button or link.

5.1.6   Display Type: Select how you would like to display custom link, as a Detail Page Link, Detail Page Button or as a List Button. In our case we are displaying it as a button.

Note:

- **Only object which have a lookup relationship with ENZ__FTPAttachment__c object will appear in the list.**
- **URL must end with / and must be mapped to the application's root.**

Figure. 5.1 Custom Link Manager

5.1.7 Enter the Folder parameter where the attachment will be stored on the server, this can use Salesforce merge fields tool. Example: Orders/ {! Order__c.Name}

Note: You can use Salesforce expressions here just like you use in custom links of Salesforce.

Example: Say if you want to save all attachments from US accounts in US server and all other files in India server, you can use this text to choose appropriate Profile at runtime. So, {! IF (Account.BillingCountry = "United States", "US", "India")}

5.1.8 Enter the Server Profile logic or name in this field, depending on object data server profile can be selected to save the file. (Only available while creating Attach links)

6. Configure Salesforce page layouts to use FTP Attachments®

After installing FTP Attachments® application in your Salesforce account. Now you need to add the links for FTP Attachments® in Salesforce objects page layout. If you like to configure your links differently than the standard links provided in the package, please use the Custom Link Manager tool explained in the chapter 5.

6.1.1 In your Salesforce account, click on the 'Setup' link and then select the Salesforce object page layout for which you want to use FTP Attachments®. Here we have taken example of Case object.
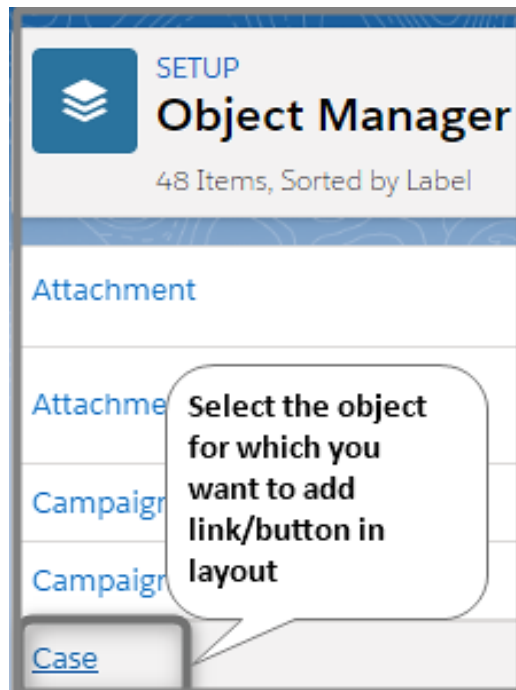

6.1.2 Go to the related list section and add FTP Attachments related list and edit its properties.
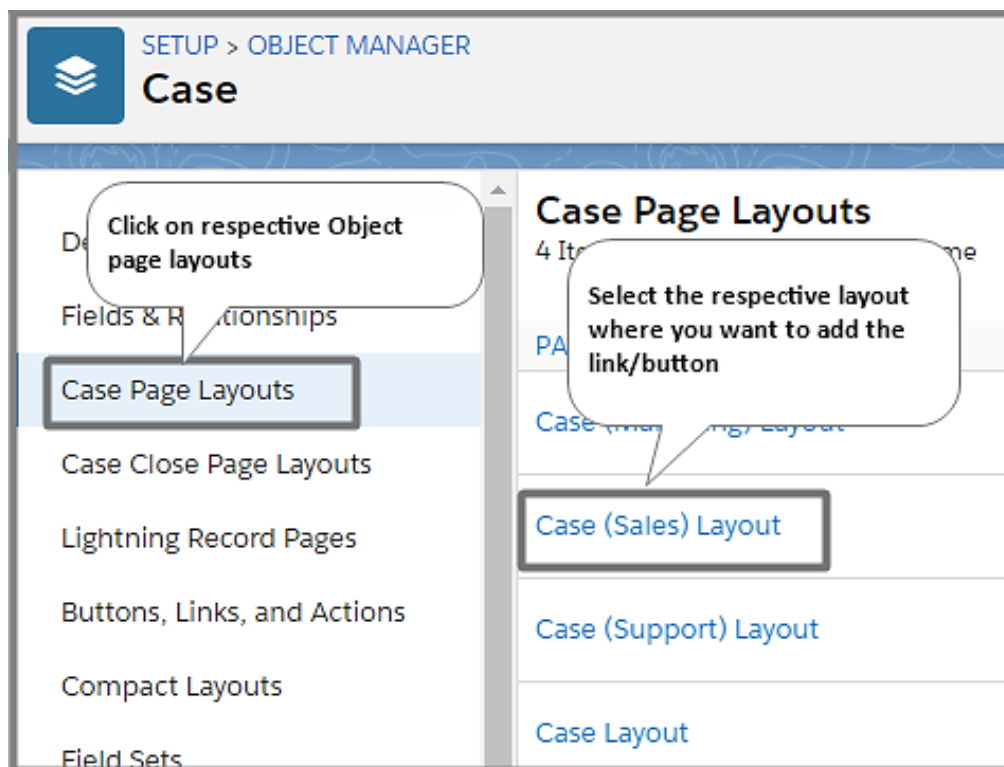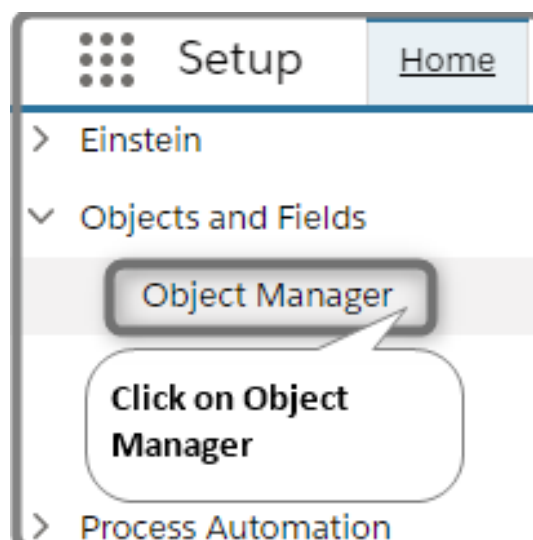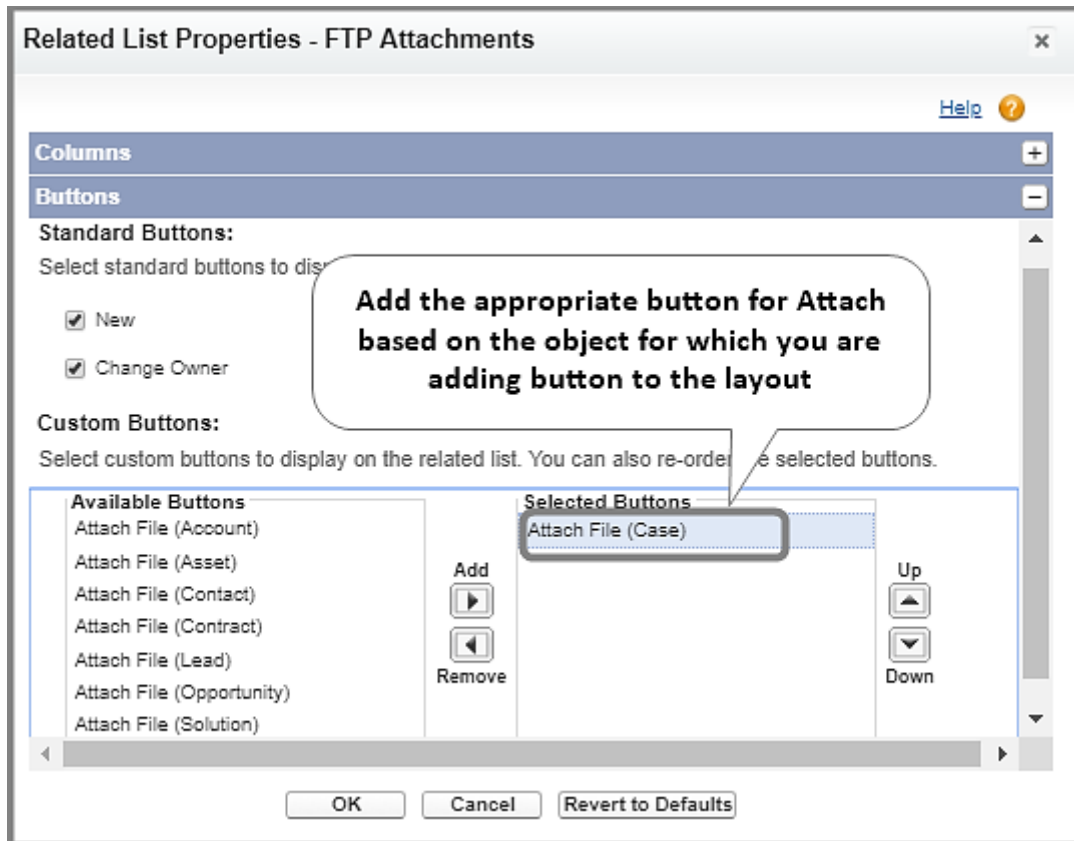
6.1.3   Add the columns which you want to display in the related list of FTP Attachments and sort it as per your requirements.

6.1.4   Make sure that standard buttons are unchecked.

6.1.5 Add the appropriate related list button for Attach functionality. Save the page layout. Now you are ready to use the FTP Attachments® for that object.
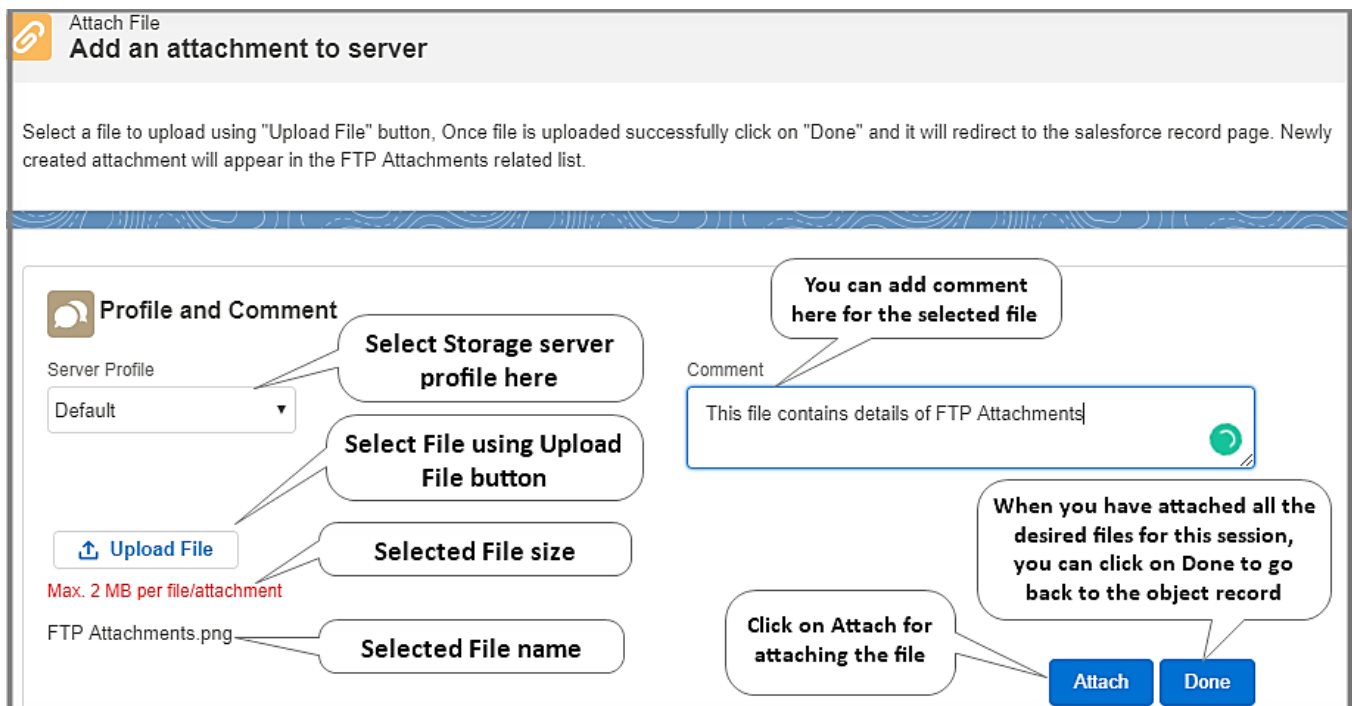
7.User Guide – How to use the FTP Attachments®

This application can be used to perform functions like attach a file, view/download an attachment, update an Attachment and delete an attachment. These functions are described in the following sections in detail.

7.1. Attach File

To attach a file, go to the particular record of the object to which you want to attach the file and click the custom link/button for attaching a file. (Figure. 7.1)

Figure. 7.1 Attach Page

7.1.1   Make sure you have already created the custom link/Button for attaching and added it to the Layout of the Salesforce object, to which you want to attach file/files.

7.1.2   Search for the particular object to which you want to attach file.

7.1.3   Click on the respective link for attaching in the custom links section, this will take you to the attach page.

7.1.4   Select the storage server profile.

7.1.5   Use the "Upload" button to select the file you want to upload. Enter the comment for the attachment (Optional) Click on "Attach".

7.1.6   Click on "Upload" button again if you wish to upload more files.

7.1.7   Click on "Done" button it will redirect you to the record page of Salesforce instance.

7.2. View Attachment

FTP Attachments® package comes with custom link "View" which is used to view the file in the FTP Attachments®.
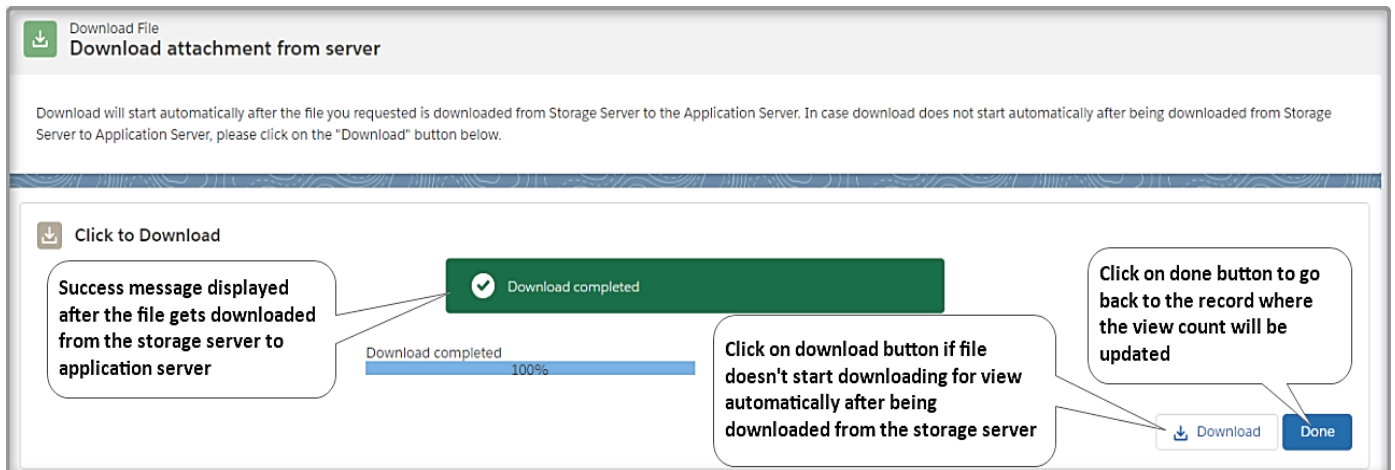(Ref.Fig. 7.2) It is illustrated with example given below:

Figure. 7.2 View Page

7.2.1   Make sure you have created the custom link/Button "View" and added it to the FTP Attachments® Layout.

7.2.2   Search for the object to which you attached the file.

7.2.3   Click on the attachment in the FTP Attachments® related list section, which you want to view.

7.2.4   Click on "View" link/button in the FTP Attachments® screen. This will open the Download page for the attachment.

7.2.5   When your file gets downloaded, click on "Close" to close the download page.

7.3. Update Attachments

FTP Attachments® Pro comes with custom link called "Update Attachment" which is used to attach the same file with updated information. By doing this, you will be able to maintain versions of your attachments so that you can go back in history and get the older version of the document or file. (Figure. 7.3)
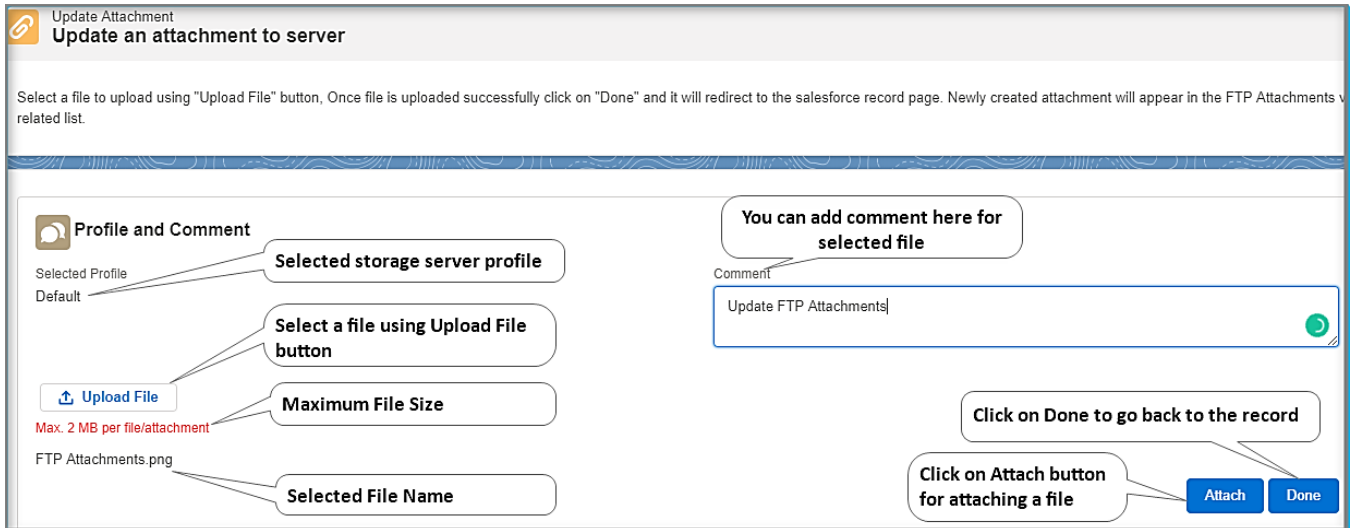

Figure. 7.3 Update Page

7.3.1 Make sure you have created the custom link/button for updating the attachment and added it to the Layout.

7.3.2 Search for the particular object to which you attached the file.

7.3.3 Click on the attachment in the FTP Attachments® related list section.

7.3.4 Click on "Update Attachment" link/Button in the FTP Attachments® screen, this will take you to the update page.

7.3.5 Use the "Upload" button to select the file, which you have updated, to upload. Enter the comment for the attachment (Optional) Click on "Attach".

7.3.6 Click on "Done" button it will redirect you to the record page of Salesforce instance.

7.4. Delete Attachment

FTP Attachments® comes with custom link called "Delete" which is used to delete the file in the FTP Attachments® and actual file from the FTP Server. (Figure. 7.4) It is illustrated with the example given below:
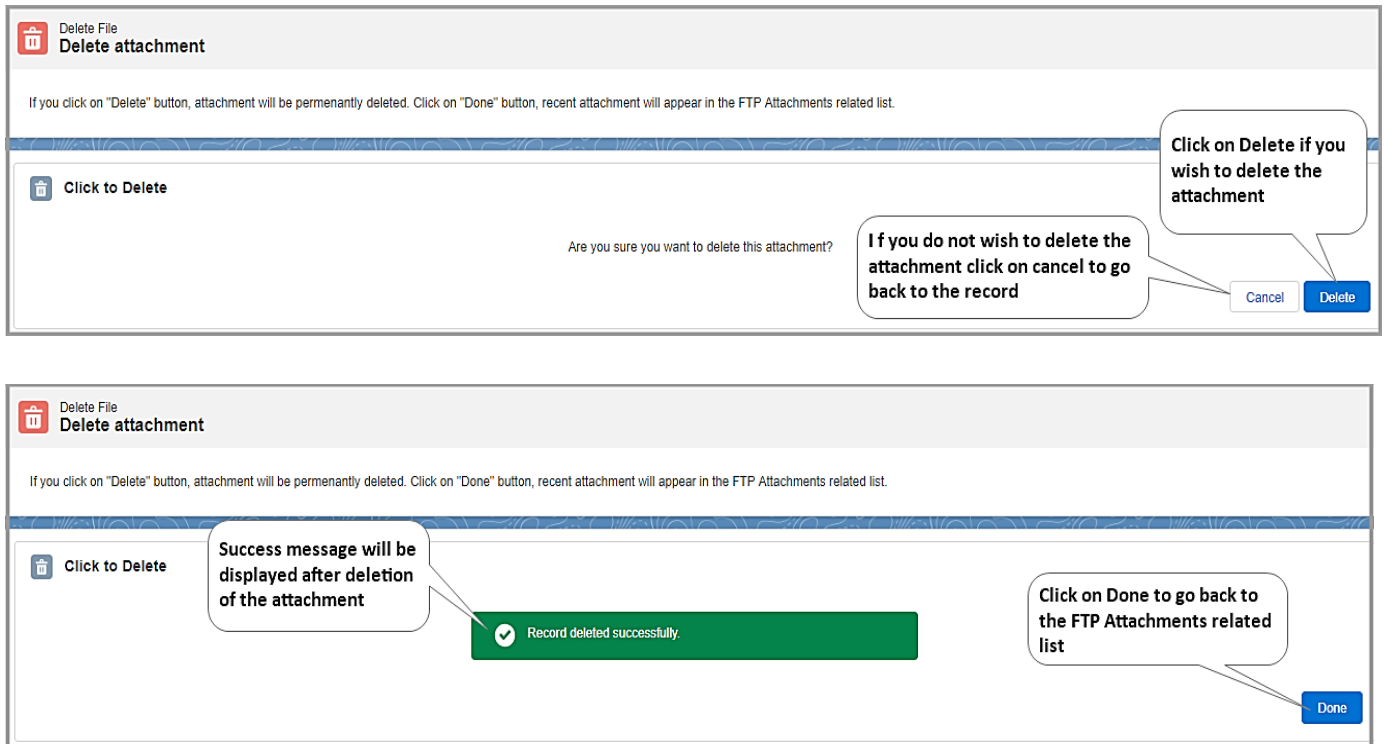

Figure. 7.4 Delete Page

7.4.1 Make sure you have already created a custom link/Button "Delete" and added it to the FTP Attachments® Layout.

7.4.2 Search for the object to which you have attached file.

7.4.3 Click on the attachment in the FTP Attachments® related list section.

7.4.4 Click on "Delete" link/Button in the FTP Attachments® screen. this will open a window with delete and cancel button.

7.4.5 Click on delete, if you willing to delete the file.

7.4.6 Go back to your Salesforce object, and refresh your Salesforce window, the file you have deleted will not be there in the FTP Attachments related list anymore.

8. Installation of Hosted Version

Installing FTP Attachments® has following steps involved:

8.1 Install the FTP Attachments® AppExchange Package (Chapter 2).

8.2 Signup for Enzigma account and subscribe for Pro version (Chapter 3).

8.3 Create additional custom links/buttons as per your requirements as described in (Chapter 4).

8.4 Configure page layouts in Salesforce for each object for which you want to use FTP Attachments® as described in chapter 5.

8.5 If you want to use FTP Attachments® for any of your custom objects you need to follow some additional steps as described in Chapter 9.

8.6 Once you follow all these steps you can start using FTP Attachments® in hosted mode that is using app.ftpattachments.com servers.

It is highly recommended that you first evaluate the application in hosted mode before trying to use the application in Standalone mode. During your evaluation of 30 days use of the application under hosted mode is allowed.

9.Install FTP Attachments®on your Application Server

For evaluating the application, you don't need to install the application on your server, in fact we recommend you evaluate the application in Hosted mode first. For commercial use we highly recommend Standalone mode.

You can download Standalone version of FTP Attachments®from

http://downloads.ftpattachments.com/builds/standalone.sforce.zip

Pre-requisites:

Minimum Hardware • Pentium IV processor or equivalent • Single Xeon recommended for > 200 concurrent users • Dual Xeon recommended for > 500 concurrent users

Attachments

- Internet connectivity required

Minimum Memory

- 512MB
- 2GB recommended for > 20 Concurrent Users
- 4GB recommended for > 40 Concurrent Users Minimum Hard Disk Space
- 10 GB of free disk space

Operating System

- Windows 2008 Server or Advanced Server
- Windows 7 or 64-Bit Edition
- Windows Server 2008 family products

Web Application Server

- IIS 6 or above
- ASP .Net 4.5 or above
- ASP .Net AJAX framework
- Administrator rights to install the application

Before you follow the steps below make sure, you have an application server ready with specifications and environment as mentioned above. It is assumed that you already have ASP.NET 4.5 or above configured to run on your IIS server along with ASP.NET AJAX.

9.1 Extract the FTP Attachments build from the link provided by us to your local machine.
9.2 Run IIS as administrator.
   1.   Right click on default Web site.
   2.   Select Add Application.
   3.   Write "sforce" in alias.
   4.   Select ASP.Net v 4.5 in application pool
   5.   Browse to the physical path where the FTP Attachments build is saved in physical path.
   6.   Click on 'Ok'. An application will be added in IIS. (Figure. 9.1 Creating Application) Right click on sforce > Manage application >Browse
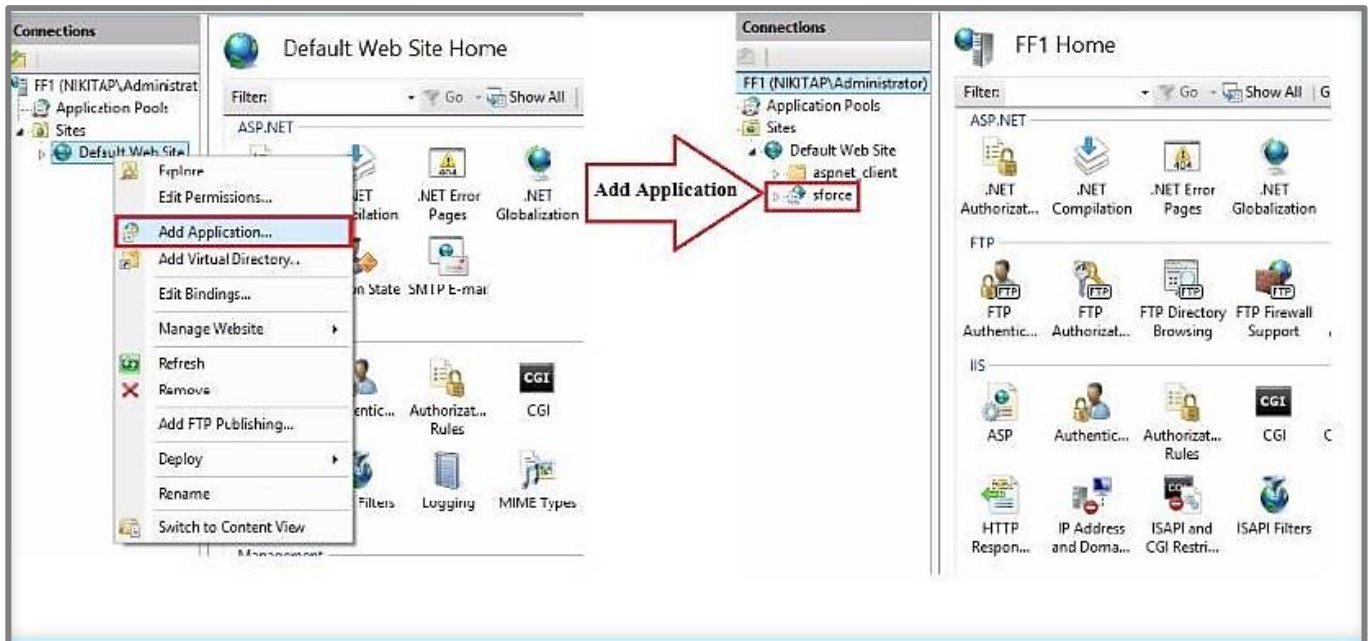   7.   If the application is successfully configure on IIS, it will take you to Login page.
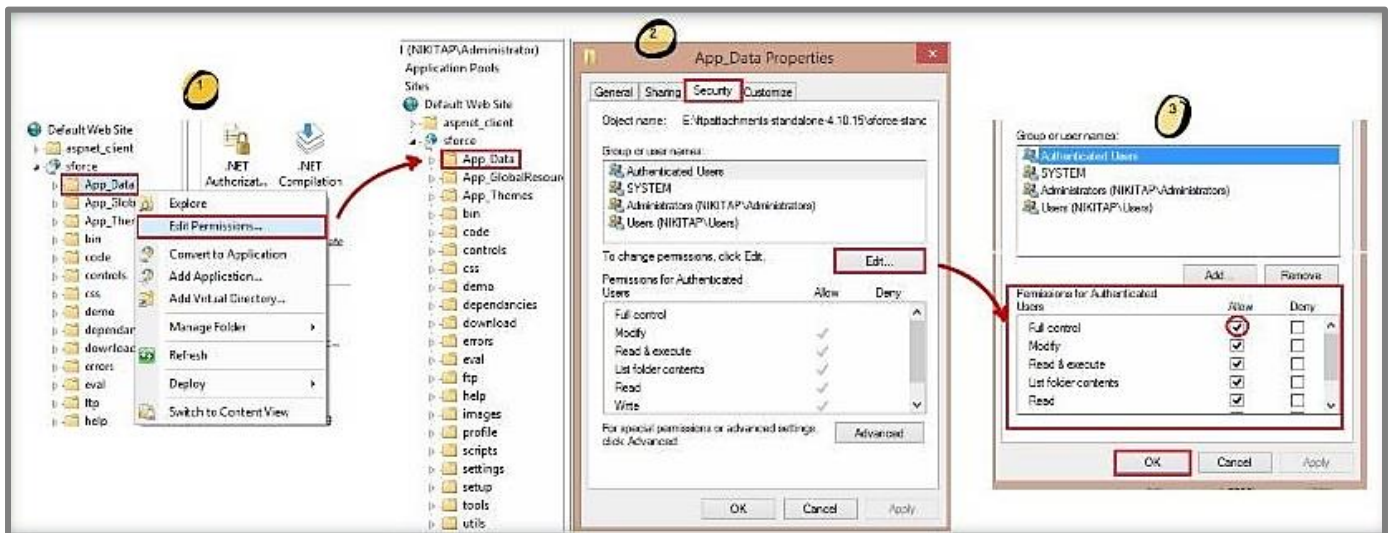
Figure. 9.1 Creating Application
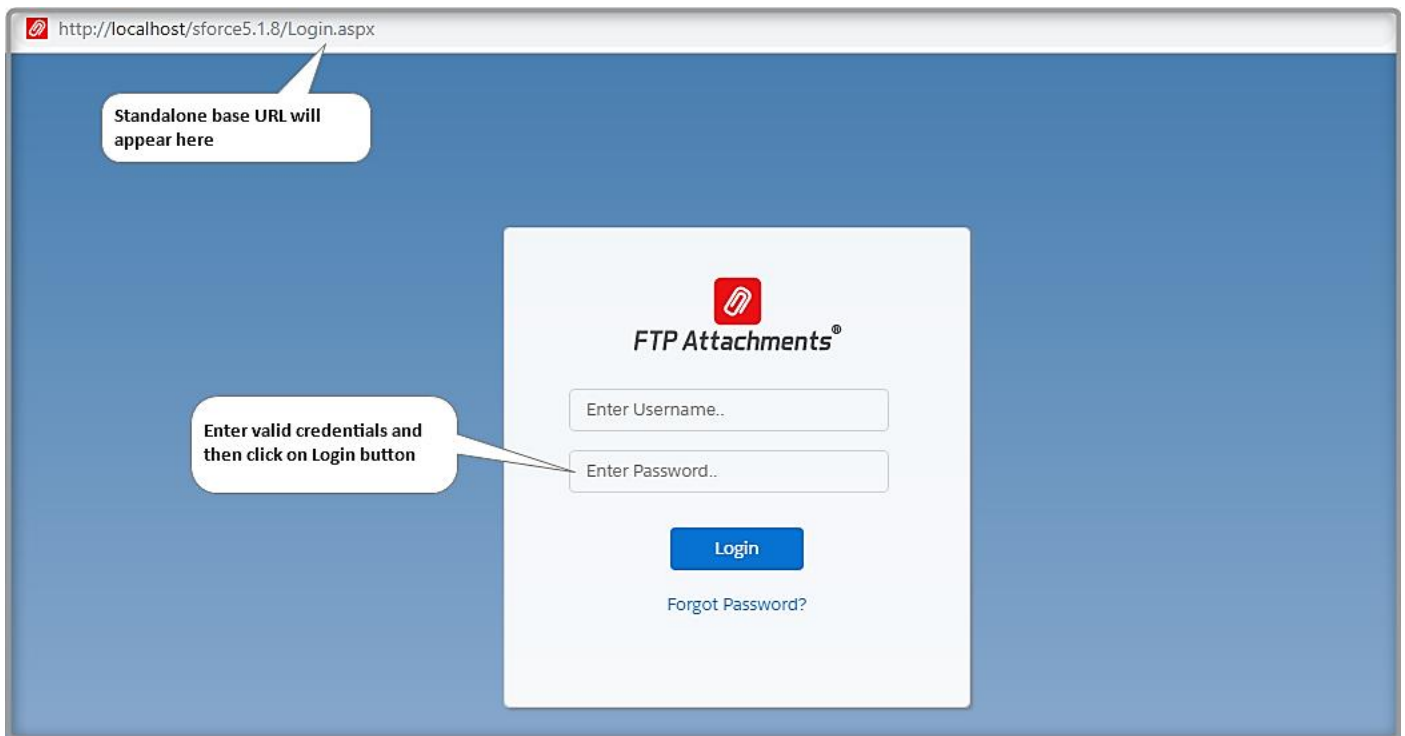

Figure. 9.2 Configuring Permissions

Figure. 9.3 Login Page

10. Using FTP Attachments® for custom objects

To use FTP Attachments® with any of your custom objects first step is to create a lookup field in FTP Attachments object which comes with the FTP Attachments® package.

10.1.1 Go to your Salesforce account and then go to Setup/Create/Objects/FTP Attachment. Let's say 'YourObject' is a custom object. So, its API reference is called "YourObject__c" by Salesforce.
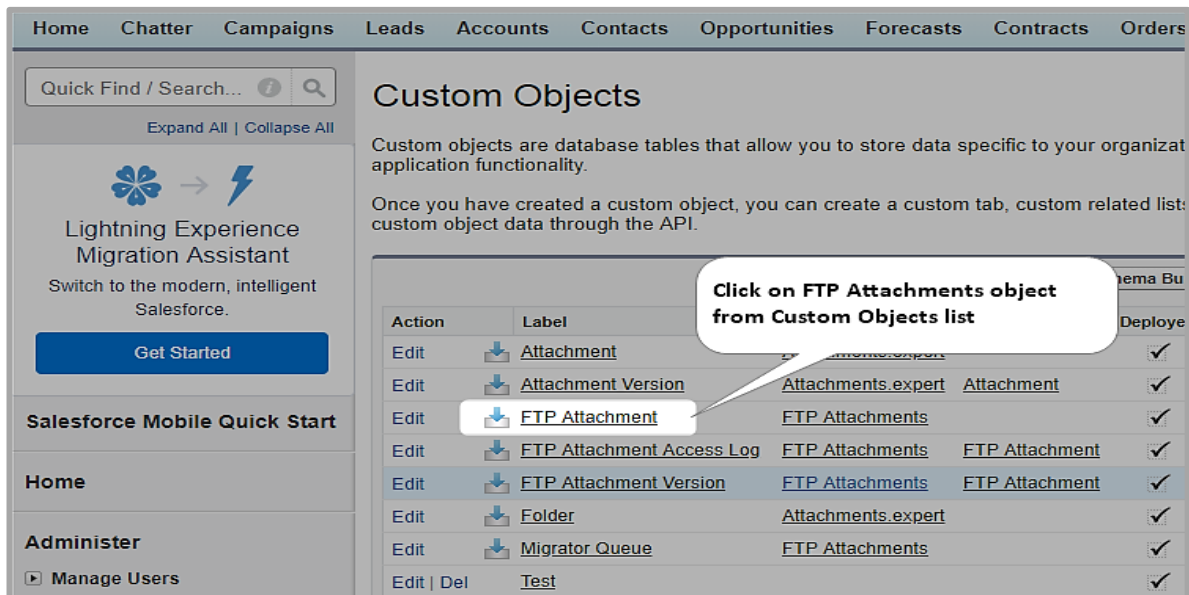
Figure. 10.1 Custom Object

10.1.2 Click New in the Custom Fields & Relationships section of the page.
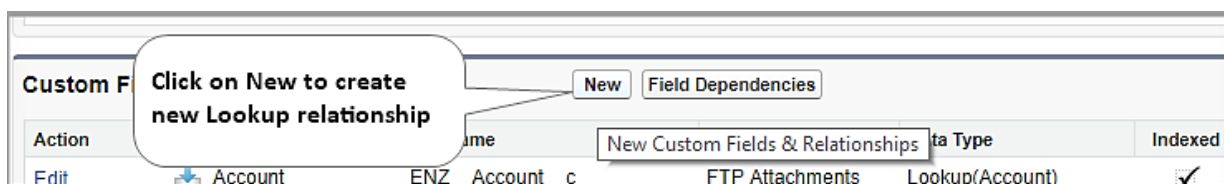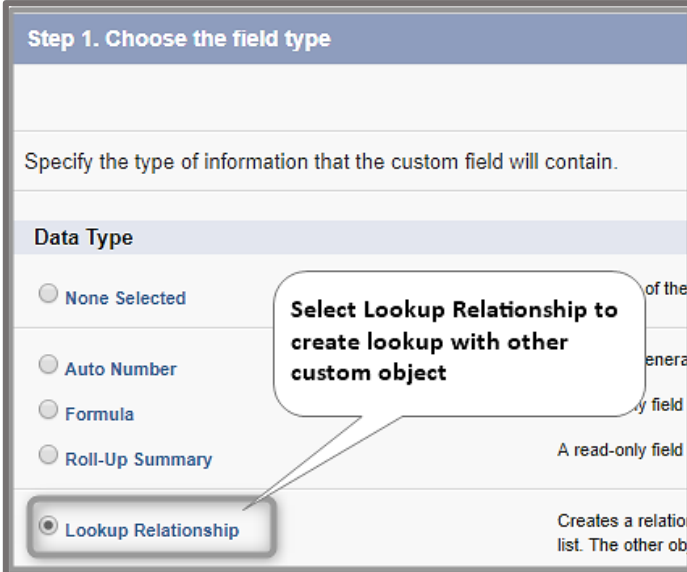
Figure. 10.2 Custom Object Lookup Relationship Creation

10.1.3 Choose the type of field as Lookup Relationship and click next.
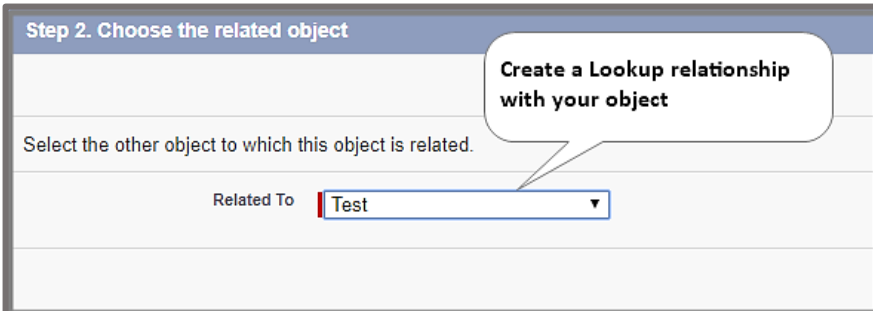
Figure. 10.3 Select field type

10.1.4 Create a lookup relationship field in the FTP Attachments object for 'YourObject' with the name say 'YourObject', because it is a custom filed Salesforce automatically appends" __c" to it at the end. Choose the object for which you want to enable FTP Attachments® , in our case it is 'YourObject'.
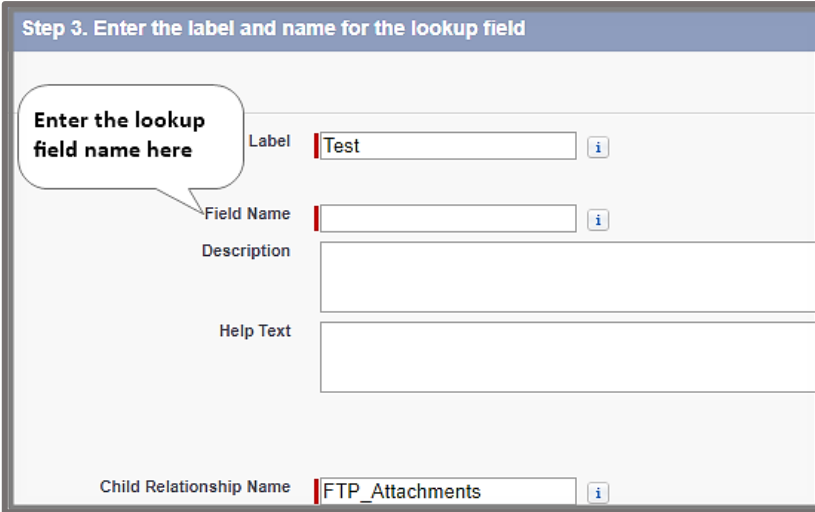
Figure. 10.4 Select Related Object

10.1.5 Finish the creation of this custom field. Once done use the Custom Link Manager as per Chapter 5 to create custom links for this custom object.

Figure. 10.5 Look up field Name

10.1.6 After creating link/button add it to the page layout of the custom object.

10.1.7 Now, you are ready to use FTP Attachments® with that custom object.

11. Using FTP Attachments® Migrator

Migrator tool can migrate existing Salesforce attachments to free up Salesforce storage. This application is add-on for FTP Attachments® applications. It can be used to migrate all your existing Salesforce attachments to FTP Attachments® application, to save you Salesforce storage space consumed by Salesforce attachments. You can use existing profiles of your FTP Attachments® application and specify parameters like Folder, and comments for each sets of attachments.

Before you start using the tool, make sure you have taken backup of all your Salesforce attachments, so no data is lost during migration due to any reason. Also, it is recommended that you do not migrate more than 500 records per day (or as per the recycle bin rules of your Salesforce account), this is in case if you see any issues you can easily rollback your attachments from Salesforce Recycle Bin.

Just like **FTP Attachments®** you can specify a common comment which will go in all the attachments migrated to Salesforce. For migrating your attachments using **FTP Attachments® Migrator** tool you need to configure some settings in Enzigma account.

In order to configure these settings:

1. Login to your Enzigma Account.
2. Go to Subscription /FTP Attachments®/Migrator/Settings

1. Default Salesforce User Login and Password: This login will be used to retrieve attachments from your Salesforce account. So, ensure that you are entering correct Salesforce login and Password. (Ref Fig 11.1)
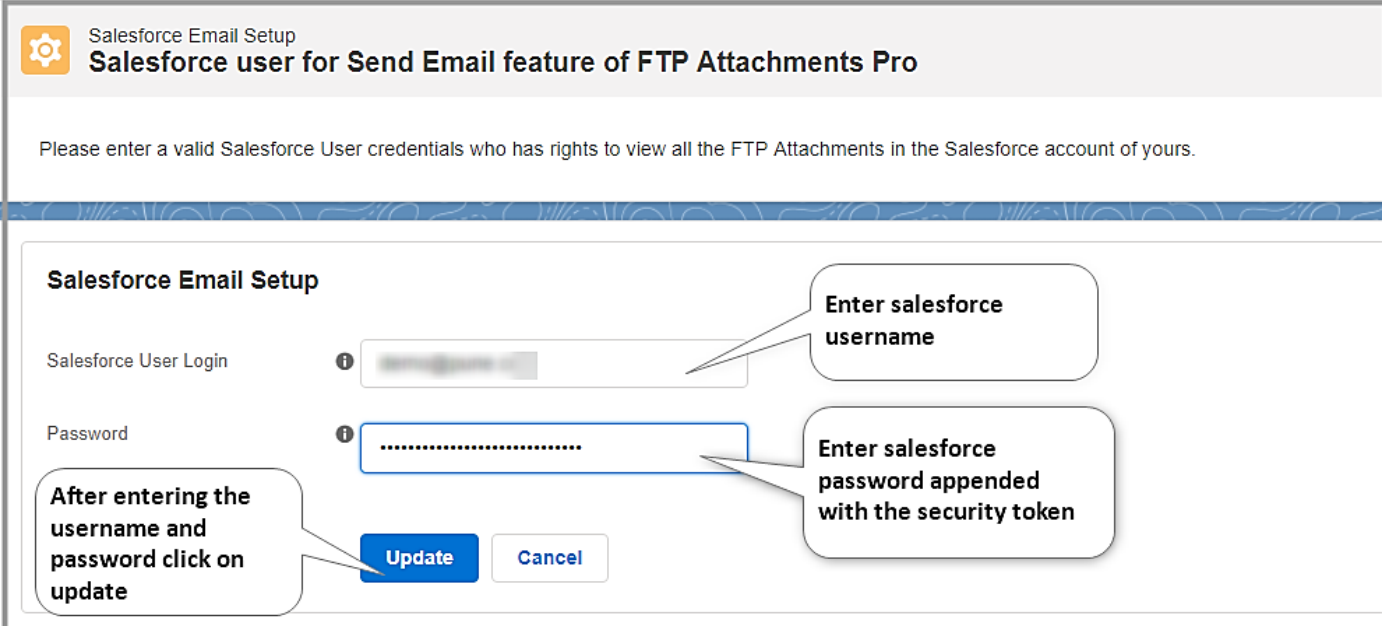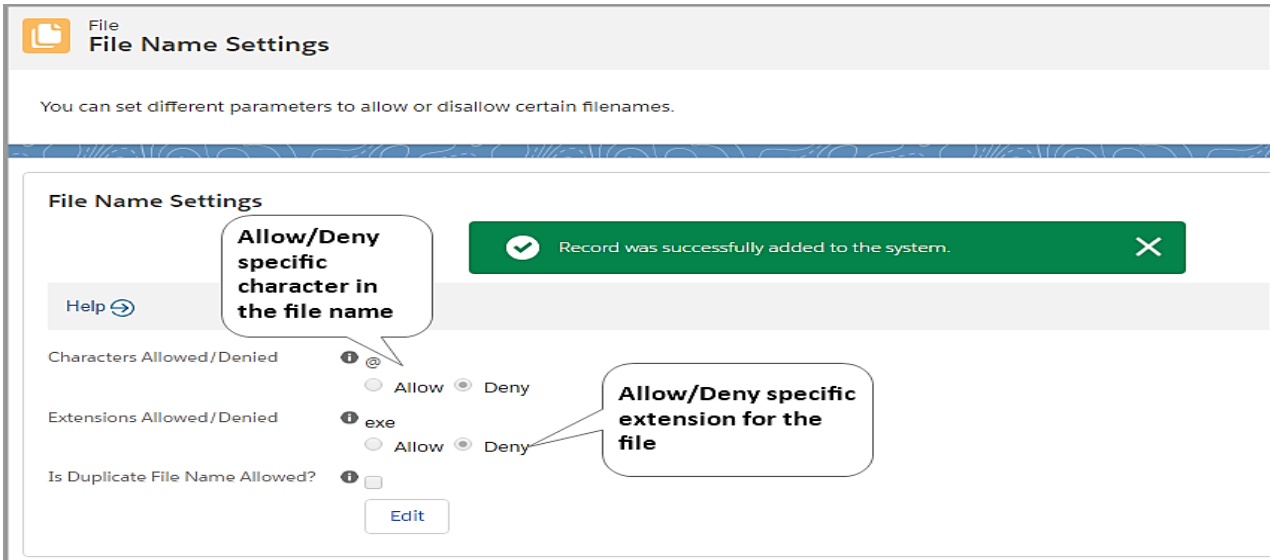

Figure 11.1 Salesforce User Setup

2. File Name Settings: Here, you can set the additional characters allowed in File Name, Extensions to be allowed or denied and Whether duplicate file names are allowed or not. (Ref Fig 11.2)

1. Additional characters allowed in the file name, along with standard characters (a-z 0-9. - _ [space]) 2. Comma separated list of file extensions allowed/denied. 3. Allow or Deny files with the same name.
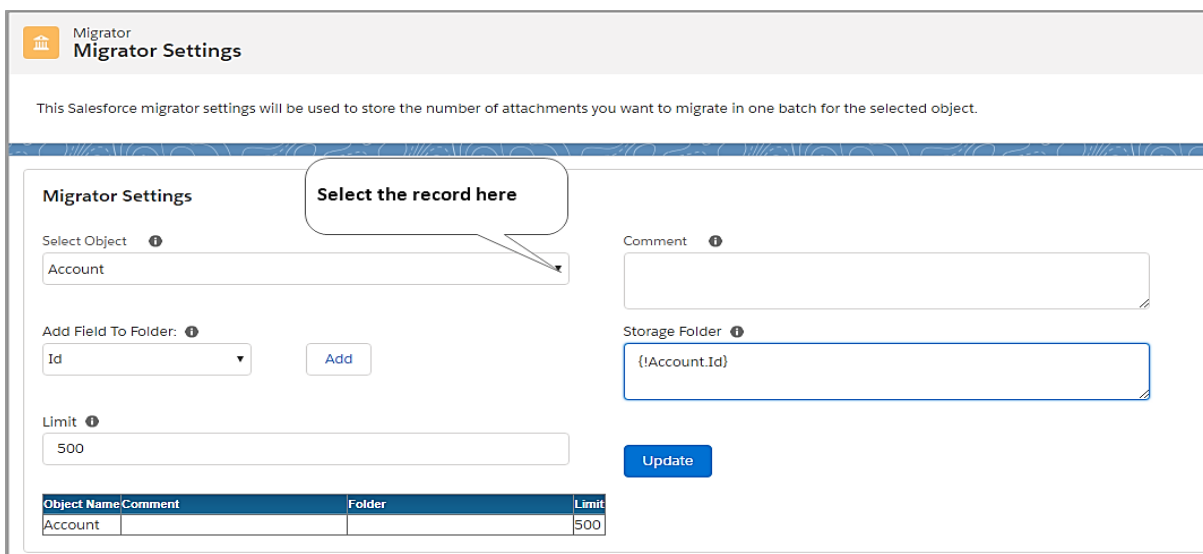
Figure 11.2 File Name Settings

3. **Object Defaults**: Here, you can set the Comment, Storage Folder and Limit for each object. While using Migrator tool, these settings will appear by default. You can change them later while migrating your attachments. (Ref Fig 11.3)

Figure 11.3 Migrator Settings

11.3.1 Select Object: Select Salesforce object from which you want to migrate attachments. Please Note: Only objects related to FTP Attachments through lookup field will be visible in this combo box.
11.3.2 Comment: Comment will be displayed in all migrated attachments.
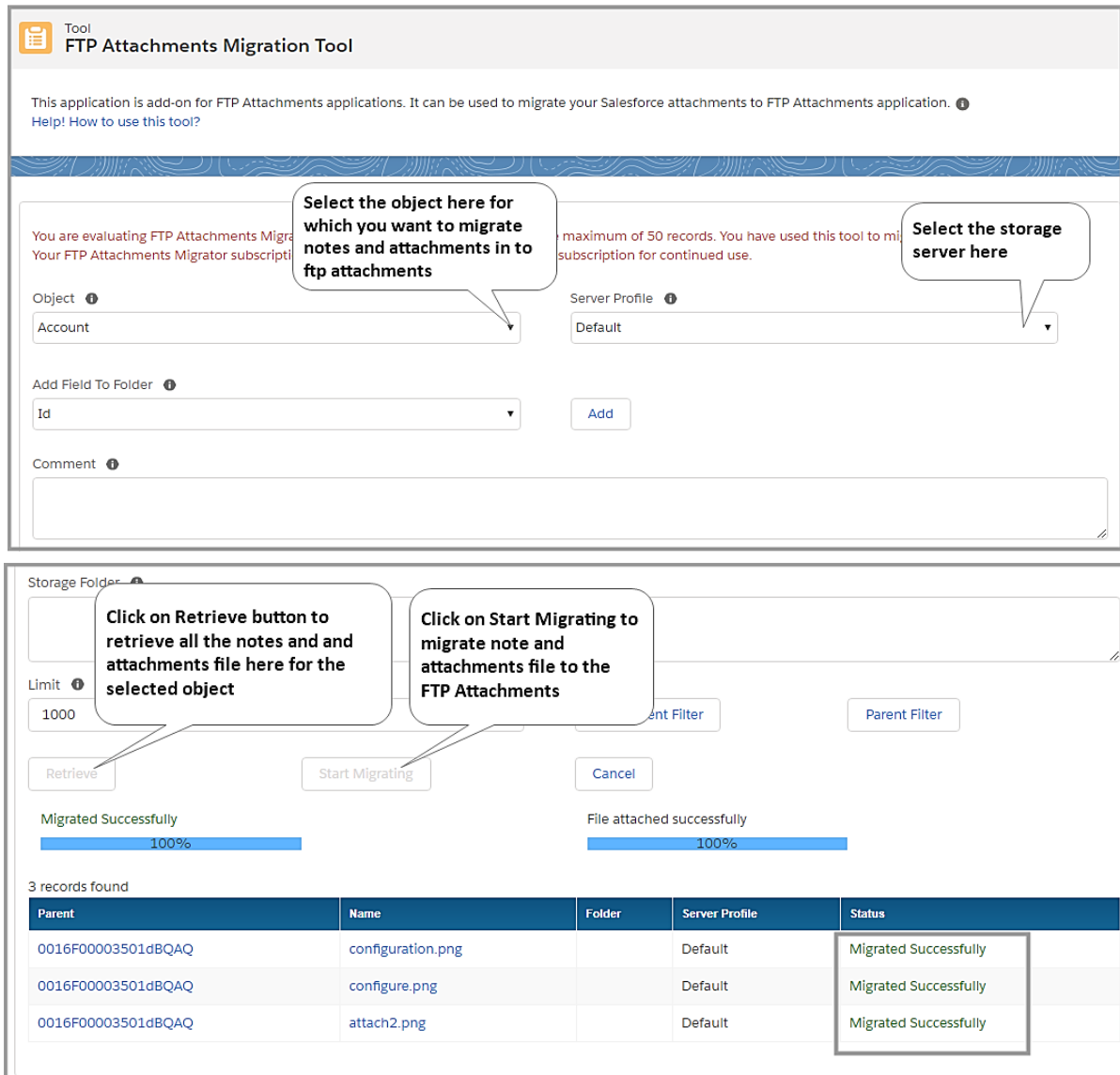
11.3.3 Add Field To Folder: Use Salesforce merge fieldnames to create folder name(e.g.Cases\{!Case.CaseNumber})

11.3.4 Storage Folder: Specify name/structure of the folder, where you want to store your attachments on server.

Note: This is just name of the folder, not absolute path.

11.3.5 Limit: Number of attachments you want to migrate in one batch. Once you have backed up your Salesforce Attachments and configured all the settings required, follow the steps given below to migrate your attachments: (Ref Fig 11.4)

Figure 11.4 Migrator Tool

11.4.1 Object: Attachments related to same type of object can be migrated together in same batch, so you can select only one type of the object in this field for which attachments will be migrated in one batch. Please Note: Only objects which are related FTP Attachments® through lookup field will be visible in the list.

11.4.2 Comment: Comment you specify here will be applied to all the attachments which are migrated to FTP Attachments®   .

11.4.3 Attachment Filter: You can specify criteria here to filter the attachments. Only attachments matching this criteria will be retrieved from Salesforce for migration.

11.4.4 **Limit**: Migrator allows only limited number of records to be migrated in one batch. You can specify this limit here. Migrator will retrieve maximum of records as per the limit specified in this field.

11.4.5 **Server Profile**: If you are using multiple storage servers, you can choose a profile of the server to which attachments needs to be migrated.

11.4.6 **Add Field to Folder**: Using this you can add a merge field to your Storage Folder. The merge fields will be replaced by appropriate Salesforce record value at runtime. E.g. you want to create folder Cases\000104 for case number 00104 when an attachment is attached to the case 00104, you can use merge field Cases/{!Case.CaseNumber} to achieve this.

11.4.7 **Storage Folder**: In this field you can specify the name/structure of the folder where your attachments will be stored on your storage server. You can also use Salesforce merge field names to create folder names at runtime. The merge fields will be replaced by appropriate Salesforce record value at runtime. E.g. you want to create folder Cases\000104 for case number 00104 when an attachment is attached to the case 00104, you can use merge field Cases/{!Case.CaseNumber} to achieve this.

11.4.8 **Parent Filter**: You can specify criteria here to filter the parent objects. Only attachments which are attached to these parent objects will be retrieved from Salesforce for migration.

Note: Please be careful while using this filter and make sure that these criteria should return not more than 500 records for best results

How does Migrator work?

- Enter all different fields and click on 'Retrieve' button, which will fetch all attachments information and display it to you.
- Review all the records carefully to see if they are going to the right folder and using right fields and servers etc.
- Once you are satisfied with the records info, you can move on to next step by clicking on 'Start Migration'
- The progress will be displayed in the screen; once it is finished you can see the results in the Status field of each record.
- In case of errors you can move the cursor to error and in the tool tip detailed message will be displayed.
- For successfully migrated attachments you can review them in the Salesforce by creating appropriate view under FTP Attachments® tab.

12. Using FTP Attachments®Advance Migrator

Advance Migrator tool is an automated tool used to migrate files from Salesforce storage server to the personal storage server. It is an add-on tool of the FTP Attachments application similar to classic Migrator tool with enhanced feature of automated migration.
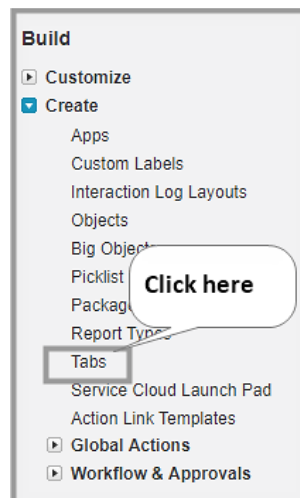
Using this tool, files can be continuously migrated from Notes and Attachments to personal storage server. The record of migrated file can be found in Salesforce's FTP Attachments object.

Note: Advance Migrator tool follows the standard Salesforce size limits of attachments and storage capacity.

Important:

a   Advance Migrator will work only for the files uploaded using Notes and Attachments of Salesforce Classic.

b   For activating the Advance Migrator tool, user needs to follow below steps in Salesforce classic and later after clicking on start in the FTP Attachments Advance Migrator tool it will automatically transfer the Salesforce attachment to FTP related list, and after clicking on Stop it will stop the automatic migration of Salesforce attachments to the FTP Attachments related list:

c   Advance Migrator tool will work only for the Salesforce attachment which user will attach after clicking on start of   the Advance Migrator tool. It will not transfer the existing Salesforce attachment.

1.   **Go to Setup, click on create Tab.**

2.   **Create Visual force tab.**
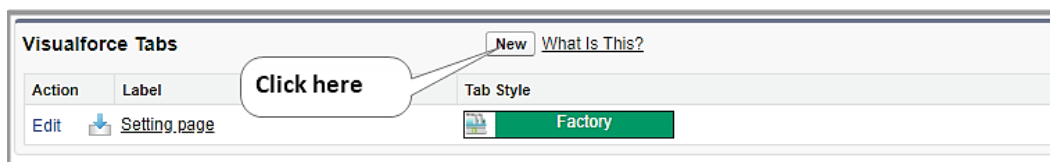
3. Open the migrator settings Tab.

1. Check the checkboxes **Attachment Trigger** and **FTPMigrator Queue Trigger** to start the triggers**.**
2. Select the object for which you want to activate the Advance Migrator tool.
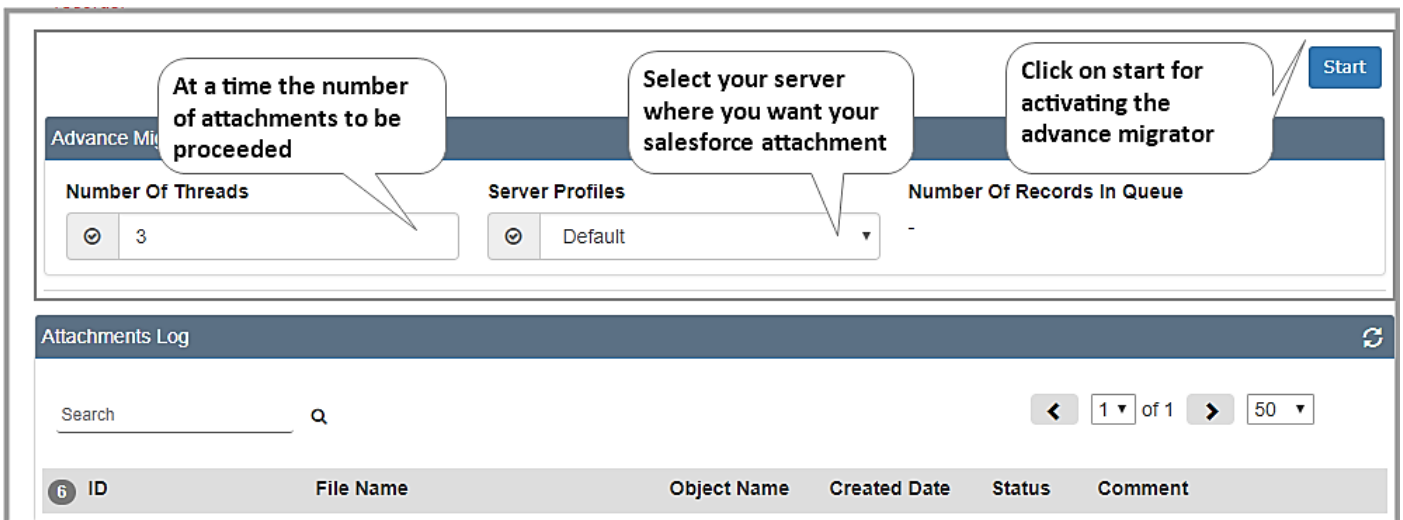3. Click on create PushTopic Record.
4. Click on "Save".

4. Click on Advance Migrator under Tools section of FTP Attachments portal.

1. Select the Number of Threads-Number of threads will be the count of attachments to be processed at a time.

2. Select the server profile where you want your Salesforce attachments to be saved.

3. Click on start button to activate the automated migration process. After clicking on start, the automatic migration of the Salesforce attachments will get started.

4. Click on stop if you do not want to continue the automatic migration of your Salesforce attachments.

Note: Click on start, only when you have

- **finished the required setting,**
- **created Visualforce tab and**
- **created PushTopic Record in the Salesforce classic.**

A) Before clicking on start.

B) After clicking on start.

13. Using FTP Attachments® Send Email Beta Functionality

Overview: Using Send Email Beta functionality of FTP Attachments® you can send email from Salesforce which

contains attachments you have attached as FTP Attachments® . This not only enables you to send emails with attachments but also large attachments can be sent as link. This is very useful for large attachments, because most mailboxes accept only certain maximum size of attachments. Also when end user wants to view the email he has to download entire attachment while downloading the email which may take time and bandwidth and may not be necessary. So only user requires to see the attachment that will can be downloaded by the user.
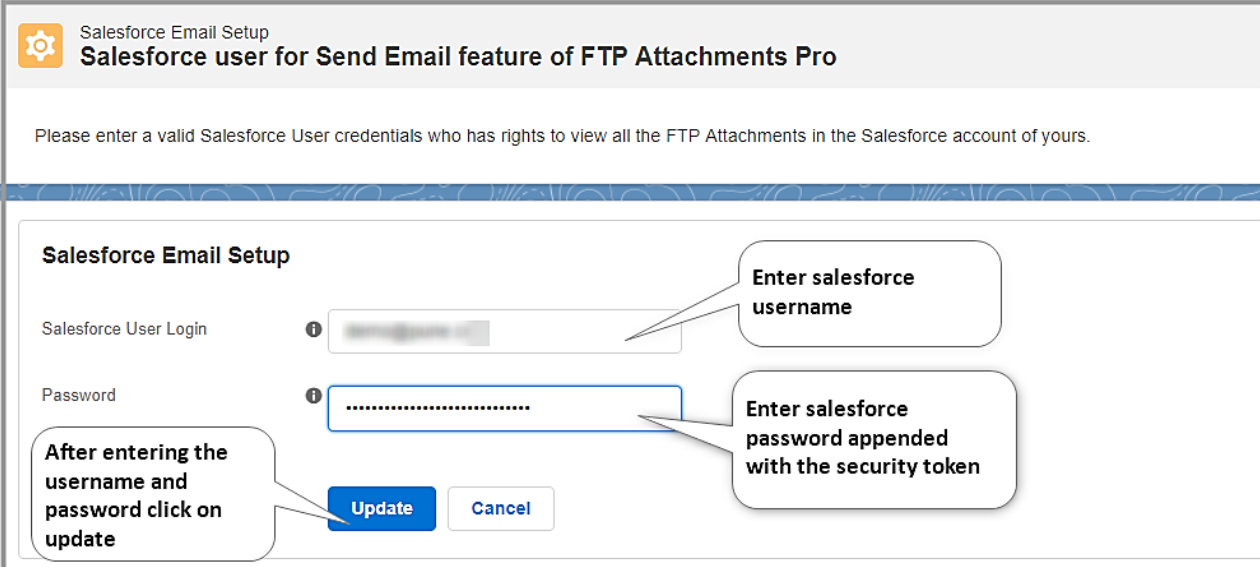
The emails sent out from Send Email Beta functionality can be sent either through Salesforce API or your own SMTP server. If you use Salesforce API to send email attachments can be sent only as links because currently Salesforce API does not accept attachments. If you need to send any FTP Attachments® as attachment in the email please use SMTP option.

Send Email Beta functionality is currently into beta version and we recommend testing it thoroughly and be alert while using this functionality in your production environment. Please feel free to contact us and suggest more functionality at support@Enzigma.com.

Configuring settings for Send Email [Beta]: Sign up with your Enzigma Account and select FTP Attachments® Pro/Subscription/Settings/Email Settings. You need to configure these settings only once, till the time you don't need to change them.

Salesforce User:

Make sure that you are entering correct Salesforce User. These credentials are very important to fetch data from your Salesforce account. When you send any FTP Attachments® as a link in email, when the recipient of the link tries to open the link these credentials are used to access the attachment. It is necessary that user user name and password supplied here has rights to the FTP Attachment® which are sent out. (Ref fig 13.1)

Figure 13.1 Salesforce User

SMTP Server Settings:

13.2.1 SMTP Server: Name or IP address of the SMTP server you want to use.

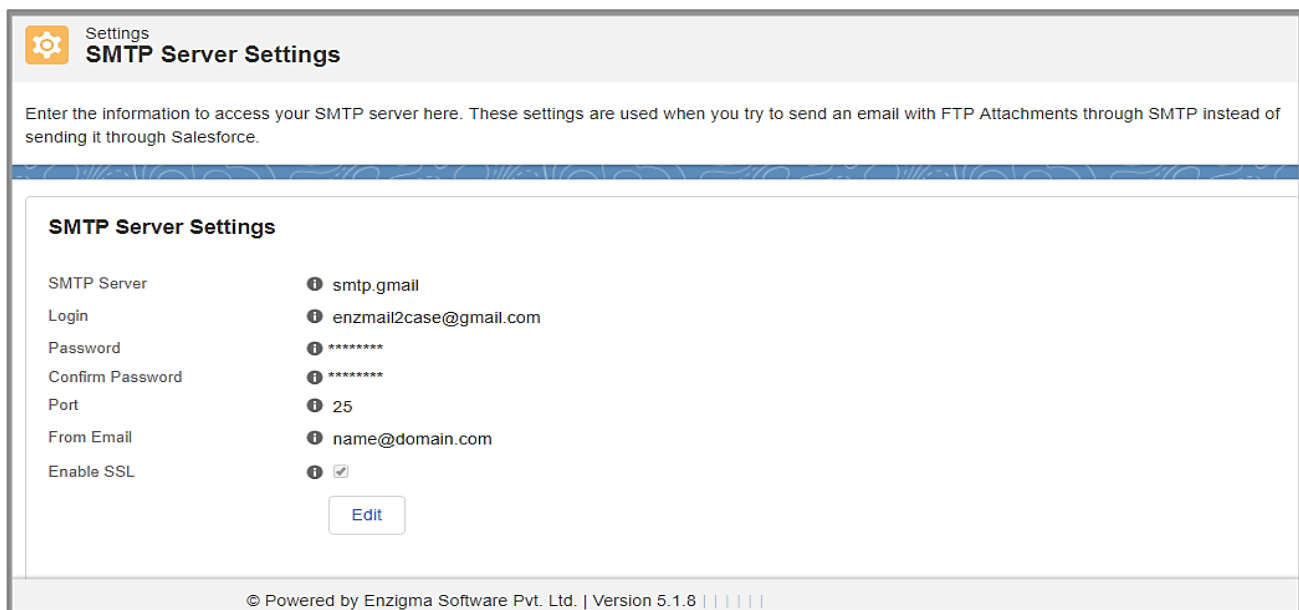**13.2.2 Login:** Login ID for the server specified.

13.2.3 Password: Password for the server specified.

13.2.4 Confirm Password: Re-type your password for confirmation.

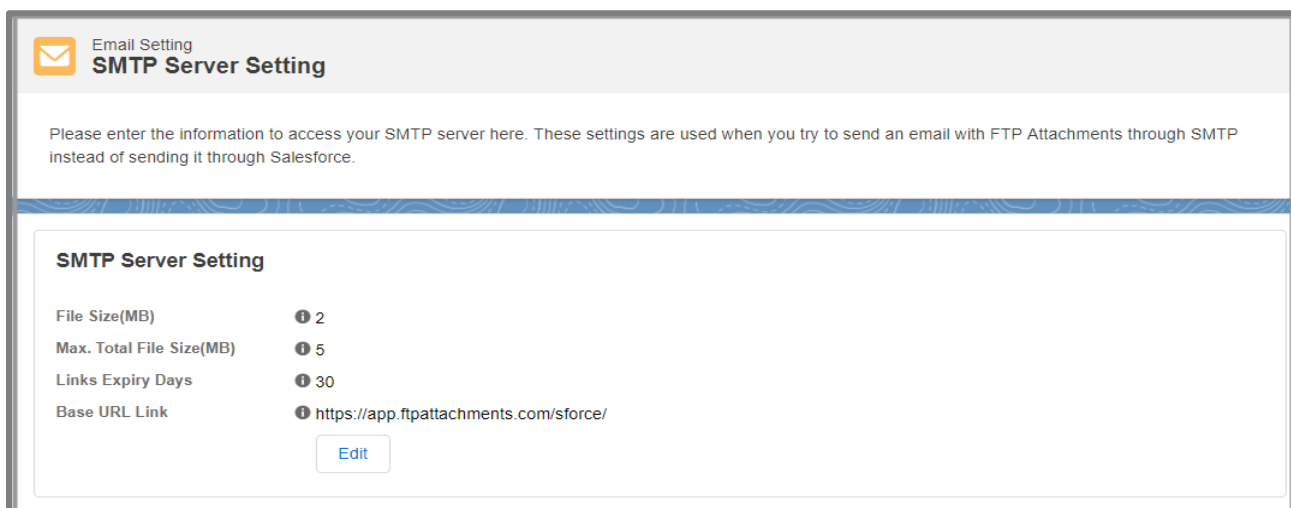**13.2.5 Port**: Port no. used to connect to your SMTP Server for communication. Default for SMTP is 25

13.2.6 From Email: Default name of the sender.

Please enter correct settings for SMTP server. These settings are used to send email through SMTP server. So if invalid data is entered, mail will not be sent. (Ref fig 13.2):

Figure 13.2 SMTP Server Settings

Figure 13.3 Email Default Settings

13.3.1 Max. File Size (MB): Maximum File Size of the attachment is to be uploaded, applicable when you want to send attachment as a file. Any single file cannot exceed this limit.

13.3.2 Max. Total File Size (MB): Maximum Total File Size for all attachments to be uploaded, applicable you want to send attachment as a file. If total size of all the attachments being sent exceeds this limit user will not be allowed to add more attachments in the Send Email Beta functionality.

13.3.3 In How Many Days Attachment Link Will Expire?: In how many days attachment link should expire. Default is 30 days.

13.3.4 Base URL for Attachment as a Link: Enter Base URL of the FTP Attachments® application is installed; this is the main URL which will be visible to the email recipients.

These settings are used when you attach files as an Attachment or as a Link to send through email. By setting Link Expiration Date you can restrict your email receiver from using the attachments after expiration date. After specified days receiver will not be able to download attachment from link.

After configuring settings in your Enzigma account, now you are ready to use Send Email Beta feature.

Using Send Email Beta functionality: Make sure you have created the custom link or button "Send Email" and added it to the page layout of the object through which you want to Send Email. You can use our Custom Link Manager to generate link.

Guidelines for Figure 13.4:

13.4.1 To: Receiver of the mail

13.4.2 Cc: Carbon copy of mail will be sent to all the recipients listed here

13.4.3 Bcc: Blank Carbon copy of mail will be sent to all the recipients listed here, but they will not be able to see the names of other recipients.

13.4.4 Subject: Subject of your mail – brief 5-6 word description of the email you are sending which user can see without even opening the email

13.4.5 Send Mail Through: You can send email through either Salesforce or SMTP Server. Select the option depending upon your choice. NOTE: Salesforce does not allow sending files as Attachments. Instead, you can Send Email through SMTP server to do so.

13.4.6 Record to Salesforce: If you check this checkbox, the email you send is automatically listed in the Activity History related list of the object.

13.4.7 Preview: Preview your mail before sending.

NOTE: Make sure to add Activity History to the page layout of the object under Related List Section

Figure 13.4 Send Email

Override Button is the new functionality introduced by the FTP Attachments Application for making delete and update of your attachments easy.

Earlier when user wanted to delete the attachment or update the attachment then they had to follow the below steps-

1 Open the attachment
2 Find the delete and update button which has been added in the FTP attachments object layout. Click on the button and then process the required steps for delete/update.

This above/previous functionality is still available with our FTP Attachments object. Along with this we have introduced new feature called as Override button. Using this, user can delete and update the attachment/file from the related list of FTP Attachments.

Follow the steps given below to activate the override functionality for delete and update the attachment in the FTP Attachments related list:

1. Go to Object Manager, then Open the FTP Attachment object' Buttons link and Actions.
2. Click on edit of Standard button "Delete". Select the visual force page "DeleteAttachment [ENZ_ DeleteAttachment]" . Click on Save.

Figure 14.1 Override of Delete Button

3. Click on edit of Standard button "Edit". Select the visual force page "UpdateAttachment[ENZ_UpdateAttachment]". Click on Save.

Figure 14.2 Override of Edit Button

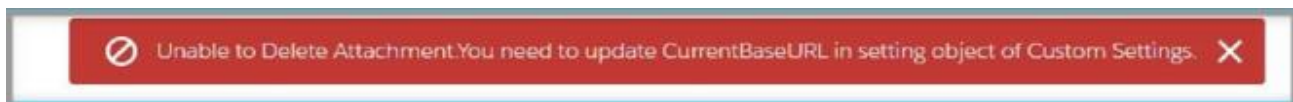**4.** Go to the FTP Attachments related list and click on delete of any attachment.

5. Click on Delete button of the page shown below:

C) Click on delete.

6. There will be a message displayed for updating the custom setting.

7. Go to Setup then type "Custom Settings" in the quick find box.
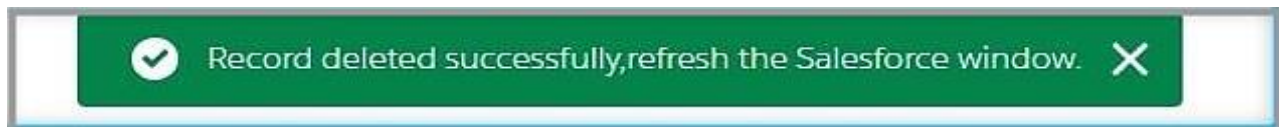

8. Click on the edit of Settings.
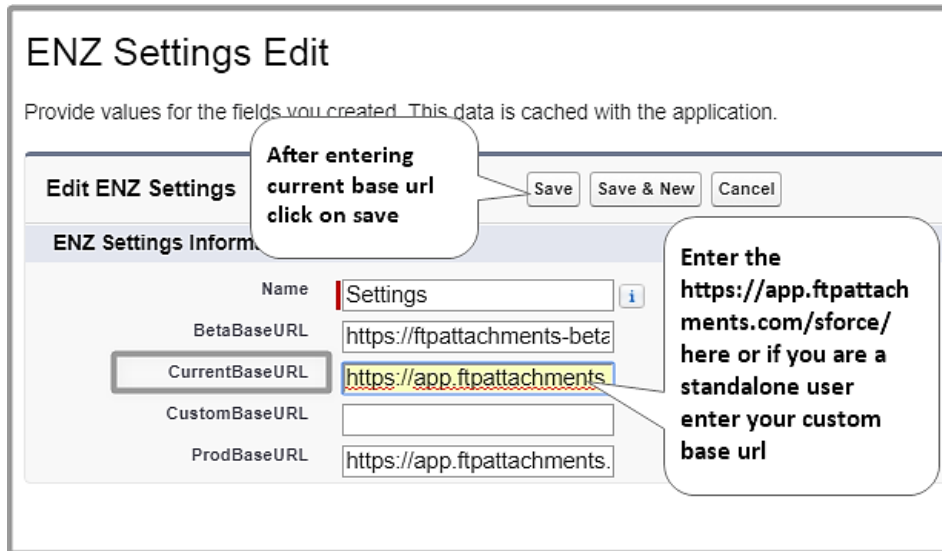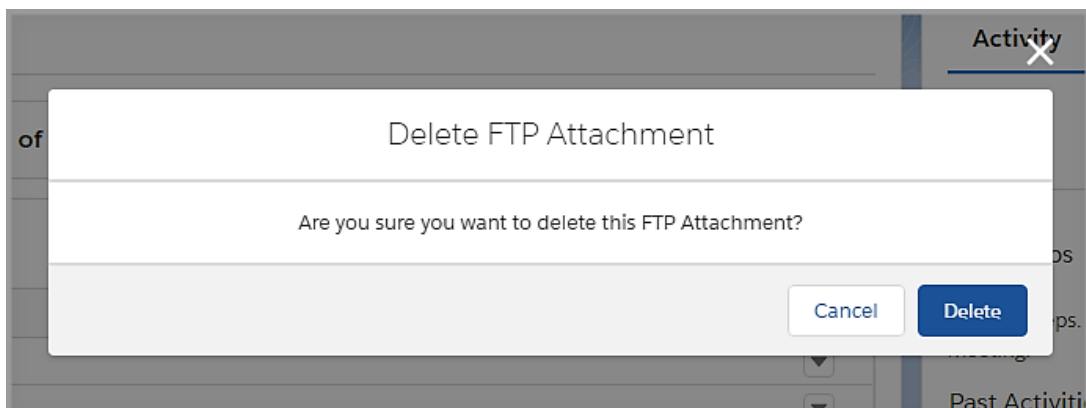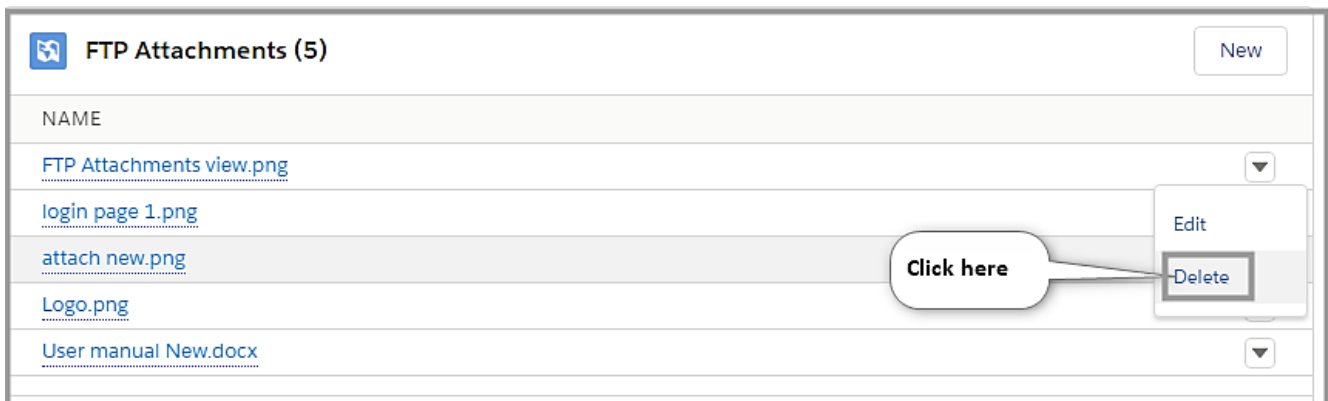
9. Enter the current base URL, and click on save.

10. Go to the FTP Attachments related list, if you wish to delete any attachment then click on delete and the attachment will be deleted permanently.
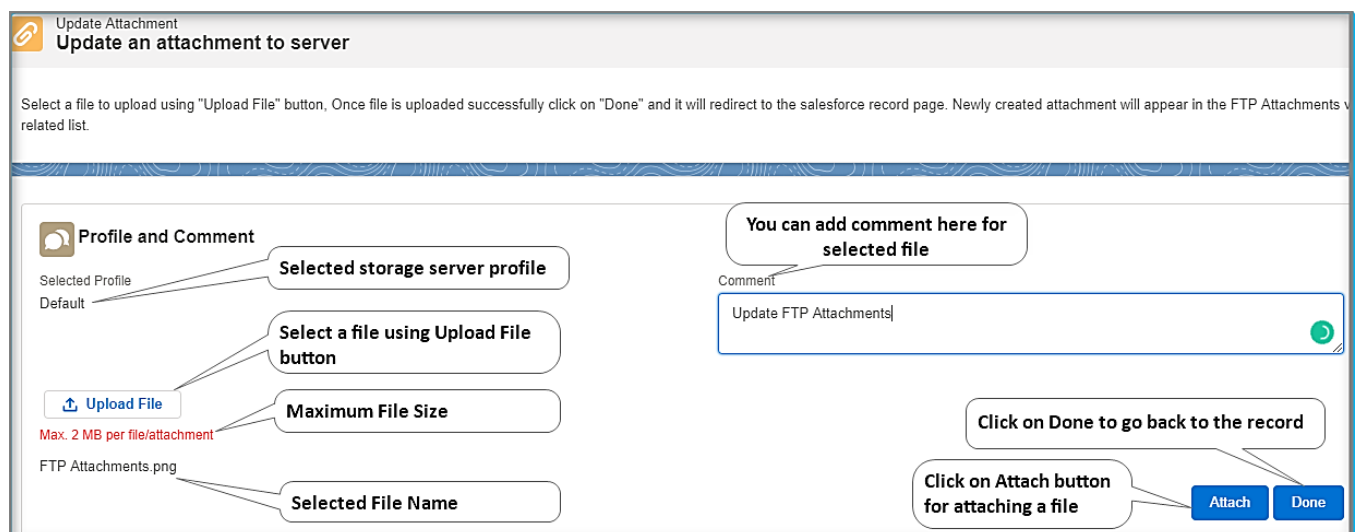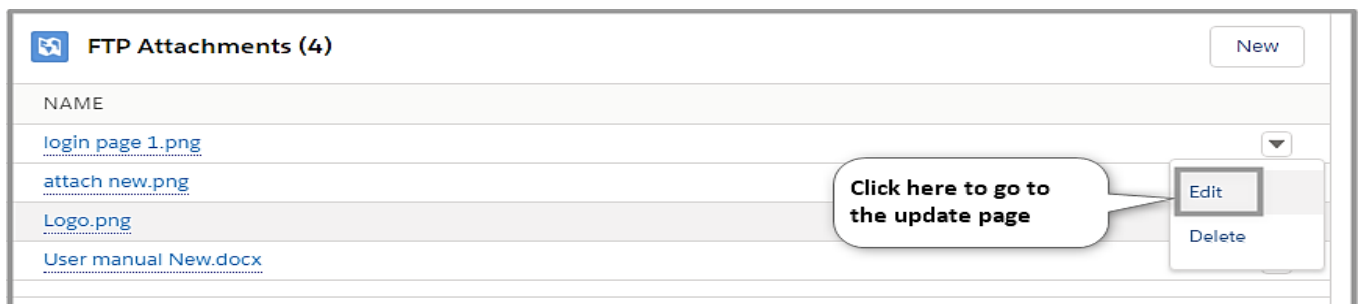

C) Click on Delete.

D) Successfully Deleted

11. Go to the FTP Attachments related list, if yu wish to update the attachment then click on edit and it will take you to the Update page. You can update your file here and click on done after updating the file.

C) Select file to be updated using upload button, Click on attach for updating the file

D) Select file to be updated using upload button, Click on attach for updating the file.