

## Customization & Enhancement Guide

### Using This Document

This document provides information about using, installing and configuring FTP Attachments™ applications provided by Enigma. It also describes how to use the FTP Attachments™ application.

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 2.0 works together.

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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 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. We keep on updating support to more Storage servers as per requests of our customers.

### 1.1. FTP Attachments™ Data flow

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.

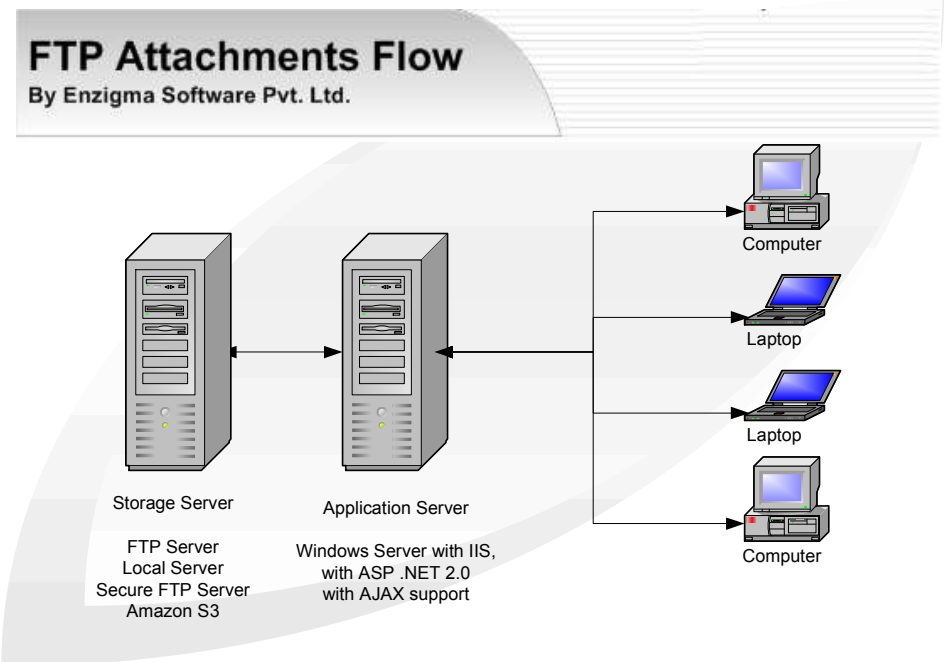


Figure 1 .1 FTP Attachments™ Flow Diagram

## 1.2. Different Editions of FTP Attachments™

There are currently two editions of FTP Attachments™ available.

**FTP Attachments™ Basic** is a free application for smaller organizations (for up to 30 users). It has all 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** has 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.

## 1.3. Different modes of FTP Attachments™

You can use this application in hosted mode or standalone mode. In Hosted mode application is hosted with us (on [www.enigma.com](http://www.enigma.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.

In Standalone 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. Some of the Storage Servers hosting available are,

- 1) Amazon S3
- 2) Exavault

Please note these are mere suggestions and we do not recommend or guarantee their services.

## 2. Comparison between FTP Attachments™ Basic & Pro

FTP Attachments™ Product Comparison Chart		Basic	Pro
Store Attachments on your own server		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Allows you to store your attachments on your own storage server giving you unlimited storage space and allows much bigger file size support compared Salesforce attachments. Various Storage servers supported are FTP server, Application server, SFTP server, Amazon S3			
Supports both Salesforce standard and custom objects		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Allows you to use FTP Attachments™ for both Standard and Custom objects of Salesforce			
Gain ownership of your data		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
If you decide your important documents never leaves your office network so you don't have to worry about anyone outside your office having access to the attachments.			
Create reports in Salesforce		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Can create reports of attachments using Salesforce reports functionality. So you can create all various types of reports unlike Standard Salesforce attachments.			
Restrict/Allow duplicate file names & extensions		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Using FTP Attachments™ you can restrict your users to attach only certain types of files. You can also restrict them from using duplicate file names under same record.			
Maintain document versions		<input type="checkbox"/>	<input checked="" type="checkbox"/>
You can maintain different versions of your document/files so you can always go back to any older version of the document/file.			
View and monitor who is using what		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Access history of all attachments is maintained which tells you at any point of time who is accessing which attachments. Also generate different reports based on it.			

Organize the attachments in folder structure	<input type="checkbox"/>	<input checked="" type="checkbox"/>
You can have your attachments organized in particular manner so one can even access the attachments directly from your server without using Salesforce if required		
Send Email from within Salesforce with FTP Attachments™	<input type="checkbox"/>	<input checked="" type="checkbox"/>
This feature enables you to send email from within Salesforce with FTP Attachments™ as attachment to the email or link in the email		
Web Service API to integrate with other applications	<input type="checkbox"/>	<input checked="" type="checkbox"/>
You can use FTP Attachments™ functionality using Web Service API. This enables you to integrate FTP Attachments™ with any other application. Also allows you to write your own application import FTP Attachments™ from other sources if required.		
Supports Self Service portal & Customer Portal	<input type="checkbox"/>	<input checked="" type="checkbox"/>
You can use FTP Attachments™ in your Salesforce Self Service Portal, so that even your customers can take advantage to low cost Storage.		
Multiple Servers	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Attachments can be stored on different servers depending on to which record file is being attached. E.g. Depending on the country attachments will be stored in different country FTP servers.		
Migration Tool	<input type="checkbox"/>	<input checked="" type="checkbox"/>
The tool migrates the existing attachments on the Salesforce to the FTP Attachments™.		

☒ = Included in base user license ☒ = Additional fee may apply

### 3. 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.

#### 3.1. 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.

- 3.1.1 Make sure you have already created the custom link “Attach (FTP)” and added it to the Layout of the Salesforce object, to which you want to Attach file/files.
- 3.1.2 Search for the particular object to which you want to attach file.
- 3.1.3 Click on “Attach (FTP)” link in the custom links section, this will popup a window asking for file and comment.
- 3.1.4 Use the browse button to select the file you want to upload. Enter the comment for the attachment (optional). Click on “Attach”.
- 3.1.5 Now, refresh your Salesforce window to see the attached file.

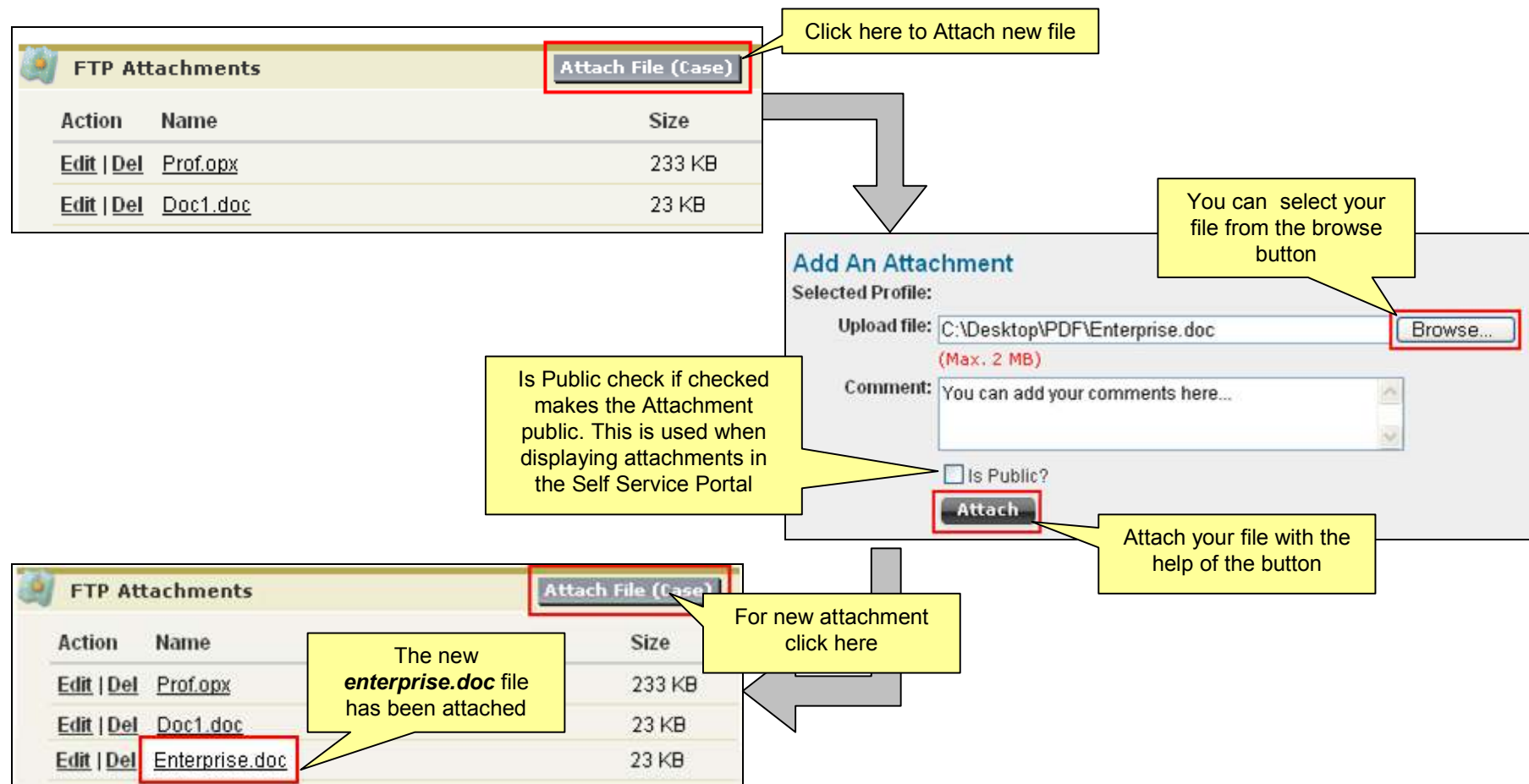


Figure 3.1 Attach File

### 3.2. View Attachment

FTP Attachments™ comes with custom link called “View” which is used to view the file in the FTP Attachments™. It is illustrated with example given below:

- 3.2.1 Make sure you have created the custom link “View” and added it to the FTP Attachments™ Layout
- 3.2.2 Search for the object to which you attached the file.
- 3.2.3 Click on the attachment in the FTP Attachments™ related list section, which you want to view
- 3.2.4 Click on “View” link in the FTP Attachments™ screen. This will open a popup and after some time your file will be downloaded.
- 3.2.5 Click on “Close” to close the download window.

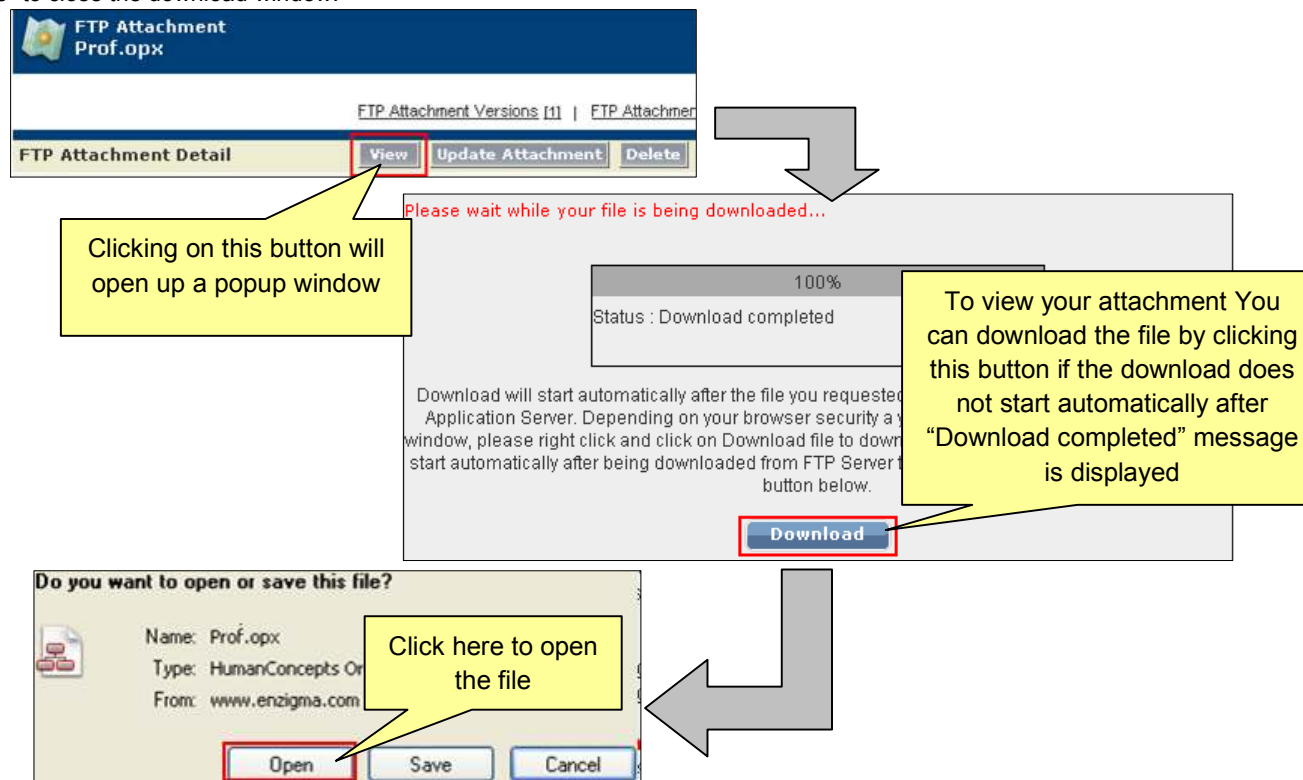


Figure 3.2 Download/View File



### 3.3. Update Attachments (Available only in FTP Attachments™ Pro)

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.

- 3.3.1 Make sure you have created the custom link “Update Attachment” and added it to the Layout
- 3.3.2 Search for the particular object to which you attached the file.
- 3.3.3 Click on the attachment in the FTP Attachments™ related list section
- 3.3.4 Click on “Update Attachment” link in the FTP Attachments™ screen, this will popup a window asking for file and comment.
- 3.3.5 Use the browse button to select the file, which you have updated, to upload. Enter the comment for the attachment (optional). Click on “Attach”.

FTP Attachment Prof.opx

FTP Attachment Versions (1) | FTP Attachment

FTP Attachment Detail View Update Attachment Delete

Clicking on this button will open up a popup window

Update Attachment

Selected Profile:

Upload file: C:\Desktop\PDF\Enterprise.doc (Max. 2 MB) Browse...

Comment: You can add your comments here...

☐ Is Public?

Attach

You can browse your file from the browser button

Attach your file with the help of the button

Versions created of file after update.

Action	Name	Version	Access Type
Edit   Del	Enterprise.doc	1	Viewed
Edit   Del	Enterprise.doc	2	Viewed

Figure 3.3 Update Existing File



### 3.4. 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. It is illustrated with the example given below:

- 3.4.1 Make sure you have already created a custom link “Delete” and added it to the FTP Attachments™ Layout
- 3.4.2 Search for the case to which you have attached file.
- 3.4.3 Click on the attachment in the FTP Attachments™ related list section
- 3.4.4 Click on “Delete” link in the FTP Attachments™ screen. This will open a popup asking for your confirmation if you really want to delete the attachment.
- 3.4.5 Click on “Yes” to confirm the deletion, this will delete the attachment from the FTP as well as from the Salesforce.

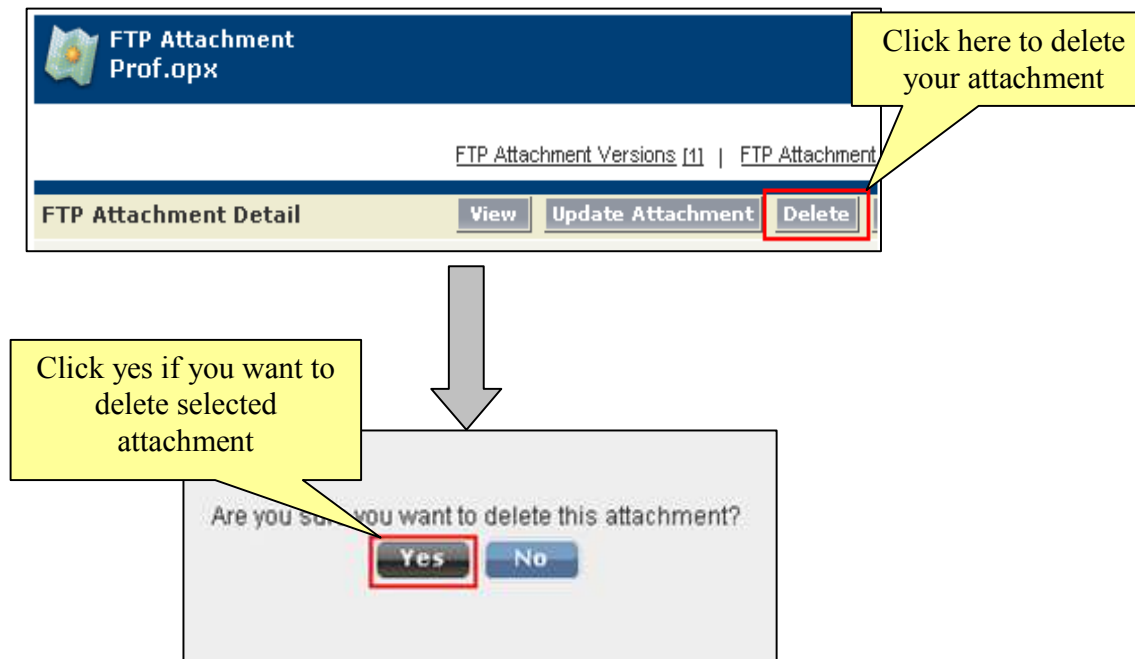
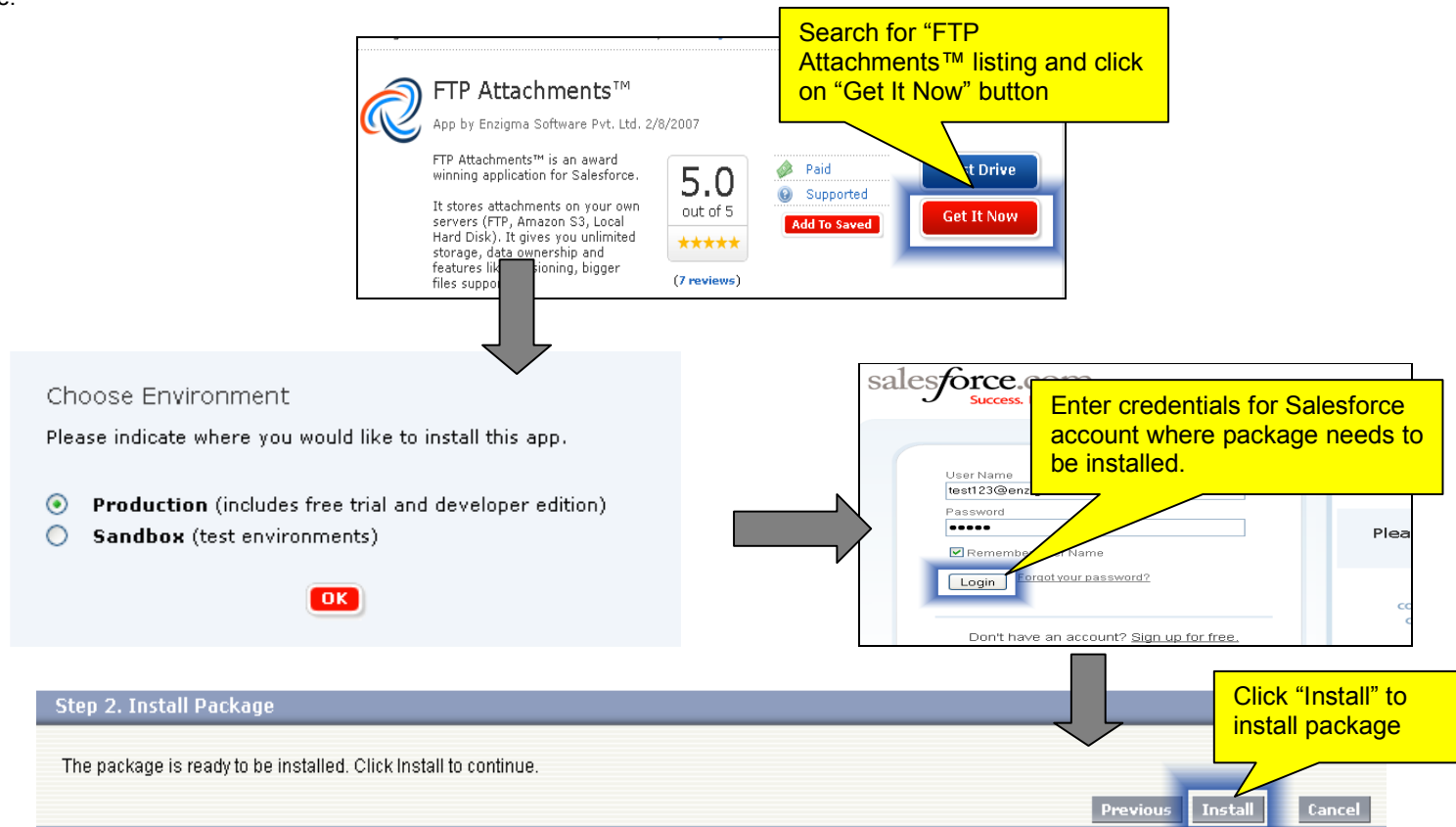


Figure 3.4 Delete File

#### 4. Install AppExchange Package & Sign Up with your Enigma account

Before you can start using FTP Attachments™ you need to create and associate your Enigma account with your Salesforce account. To sign up for Enigma account you need to first install FTP Attachments™ package in your Salesforce account. Login to your Salesforce account where package needs to be installed, go to Setup -> View Installed Packages -> Visit AppExchange.



a) Installation of package in Salesforce

Now, the FTP Attachments™ package is successfully installed in your Salesforce account. This package contains required custom objects, custom links and S-Controls. When you first time start using the FTP Attachments™, you will be asked to signup for enigma account.

**NOTE: One Enigma account can be linked with only one Salesforce account.**

b) Sign Up for enigma

Figure 4.1 Installation and Sign Up

## 5. Custom Link Manager

The custom links which comes with FTP Attachments™ package are read only and you can not edit them. They by default point to [www.enigma.com](http://www.enigma.com) servers. So in case you want to configure the custom links for FTP Attachments™ you can use Custom Link Manager tool to create new custom links as per your needs. To use this tool, go to your Enigma account and then go to menu Tools/Custom Link Manager. Generally for evaluation purpose you can use the 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.

You can add different types of links 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 Attachment object 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, 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 Enigma server you can use the link which comes with the FTP Attachments™ package. These links are created for FTP Attachment object which comes in the FTP Attachments™ package. If you create these links 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 Attachment object which comes with FTP Attachments™ package.

**Important:** This tool is just to help you create these links much faster and easily. You can always create/edit links directly 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.

Refer Figure 5.1:

1. Select action to be performed on standard or custom Salesforce object. For e.g.: Attach
2. Select the object on which you want to perform action  
**Note:** Only object which have a lookup relationship in ENZ\_\_FTPAttachment\_\_c object will appear in the list.
3. Enter your server's base URL. e.g. <https://www.yourdomain.com/sforce/> in Server field, if you are using Enigma's server please enter <https://www.enigma.com/sforce/>  
**Please Note:** Url must end with / and must be mapped to the application's root
4. The unique name for the button or link used when referenced from a merge field

5. The text that displays on user pages for the custom button or link
6. 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 Link Button.
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 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")}
```

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)
9. Enter recipient e-mail address (Only available while creating Send Email links)
10. Enter comma separated list of Cc address (Only available while creating Send Email links)
11. Enter comma separated list of Bcc address (Only available while creating Send Email links)
12. Enter senders e-mail address (Only available while creating Send Email links)

Actually using these fields application assigns the attachment to appropriate parent object, if these parameters are incorrect attachment will be assigned to the wrong parents. So, you must make sure that you are using correct parameters. You can always refer the custom links which comes with the application package.

**Note:** Every "Link Actions" have different settings, so according to the action selected you will have to provide the necessary settings.

### Create Custom Link "Attach (FTP)" for Standard/Custom Salesforce objects

Using this utility you can create 'Attach (FTP)' link for Standard/Custom objects of Salesforce which were not supplied with the FTP Attachments package. Before you create the custom link you need to make sure you have added a lookup field in FTP Attachment object for the object you want to create link on. This utility can also be used for the objects whose custom links came with the package, to create new one pointing to your own server.

[Detailed Information: >>](#)

#### Create Or Update Link

Link Action:

Attach

Object:

RecordType

Standalone Server Base Url:

https://www.enigma.com/sforce/

Name

List Button

Label

ListButton

DisplayType

Detail Page Link

Id

Add

Folder

Account/

ServerProfile

Save

Cancel

Click Save button to save your changes

FTP Attachments™ custom links which comes with the package can not be edited. Instead you need to create new custom links in your Salesforce account if you want to change any link. This tool helps you to create the links in your Salesforce account

New

Name	Link Type	Server	Object	Folder	Server Profile	
Select ENZ_AttachFTP_Attach_Account	List Button	https://www.enigma.com/sforce/	ENZ__FTPAttachment__c	Accounts/...		Delete

Figure. 5.1 Custom Link Manager

## 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 then what standard links comes in the package please use the Custom Link Manager tool explained in the Chapter 5.

- 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.
- 2) Go to the related list section and add FTP Attachments related list, and edit its properties.
- 3) Add the columns which you want to display in the related list of FTP Attachments and sort it as per your requirements.
- 4) Make sure that standard buttons are unchecked.
- 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.



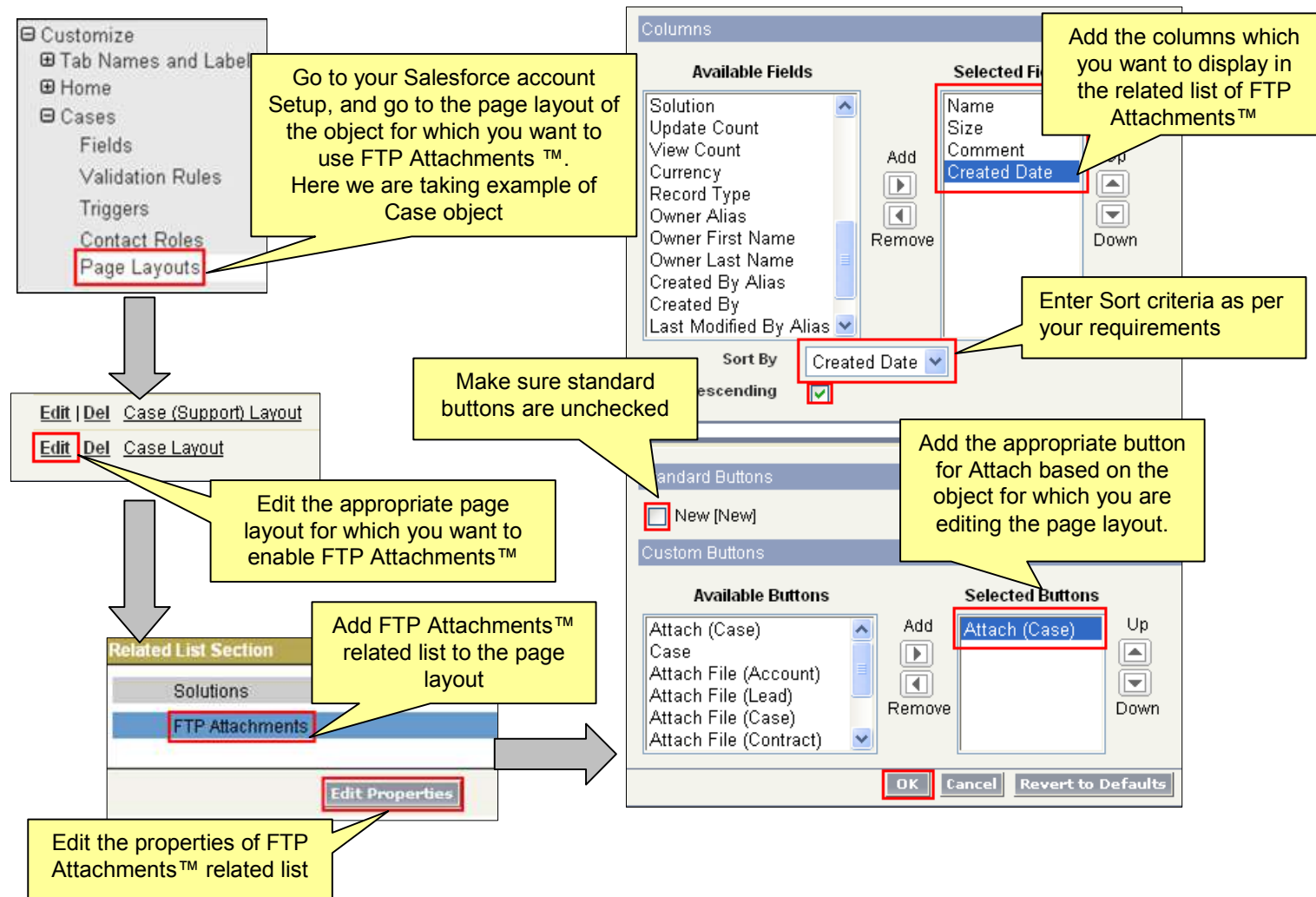


Figure 6.1 Configuring Page Layout

## 7. Installation of Hosted Version

Installing FTP Attachments™ has following steps involved:

- 7.1 Install the FTP Attachments™ AppExchange Package (Chapter 4)
- 7.2 Signup for Enigma account and subscribe for Basic(Free) or Pro version (Chapter 4)
- 7.3 Create additional custom links/buttons as per your requirements as described in Chapter 5.
- 7.4 Configure page layouts in Salesforce for each object for which you want to use FTP Attachments™ as described in Chapter 6.
- 7.5 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.
- 7.6 Once you follow all these steps you can start using FTP Attachments™ in hosted mode that is using [www.enigma.com](http://www.enigma.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.

You can also view our video demonstration on how to install FTP Attachments™, are available at <http://www.enigma.com/sforce/demo/EvaluationInstall.aspx>

## 8. 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.

Please see our video demo on how to install FTP Attachments™ on your server to use it in Standalone mode  
<http://www.enigma.com/sforce/demo/StandaloneInstall.aspx>

You can download Standalone version of FTP Attachments™ from <http://www.enigma.com/downloads/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 2000 Server or Advanced Server
- Windows XP Professional or 64-Bit Edition
- Windows Server 2003 family products

#### **Web Application Server**

- IIS 5 or above (which supports ASP .Net 2.0)
- ASP .Net 2.0
- ASP .Net AJAX framework

<http://www.microsoft.com/downloads/details.aspx?FamilyID=ca9d90fa-e8c9-42e3-aa19-08e2c027f5d6&displaylang=en>

**Environment**

- 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 2.0 configured to run on your IIS server along with ASP .Net AJAX.

- 8.1 Extract the file in your website root folder (Generally C:\inetpub\wwwroot). You can also choose any other folder on your system and create virtual directory in IIS as per your requirement. (Figure 7.1.1)
- 8.2 Allow ASP.NET user (or the user as which ASP .NET is running as) write access to “App\_Data” folder in the “sforce” folder you extracted above.
- 8.3 Open the IIS Manager from your Control Panel/Administrative Tools
- 8.4 Setup the folder “sforce” which was extracted above as ASP .NET 2.0 application
- 8.5 Go to login page of the application installed on your server, generally <http://www.yourdomain.com/sforce/Login.aspx> (The link may vary if you changed the location of the folder or created virtual folder). This should bring up the screen looking like below.
- 8.6 You need to determine the link to your application server hosting the Enigma sforce .NET service.  
e.g. <http://enigma.yourcompany.com/sforce/Login.aspx>.

After installing the AppExchange package you will be required to create custom links for each object which you wish to have attachments. These new custom links will point to this server by replacing the <https://www.enigma.com/sforce/> with the url to your own application server

e.g. <http://enigma.yourcompany.com/sforce/> in the newly created custom links, and then finally put these links in the respective page layouts as described later in this document.

So please make a note/bookmark of this path for later use (<http://enigma.yourcompany.com/sforce/>).

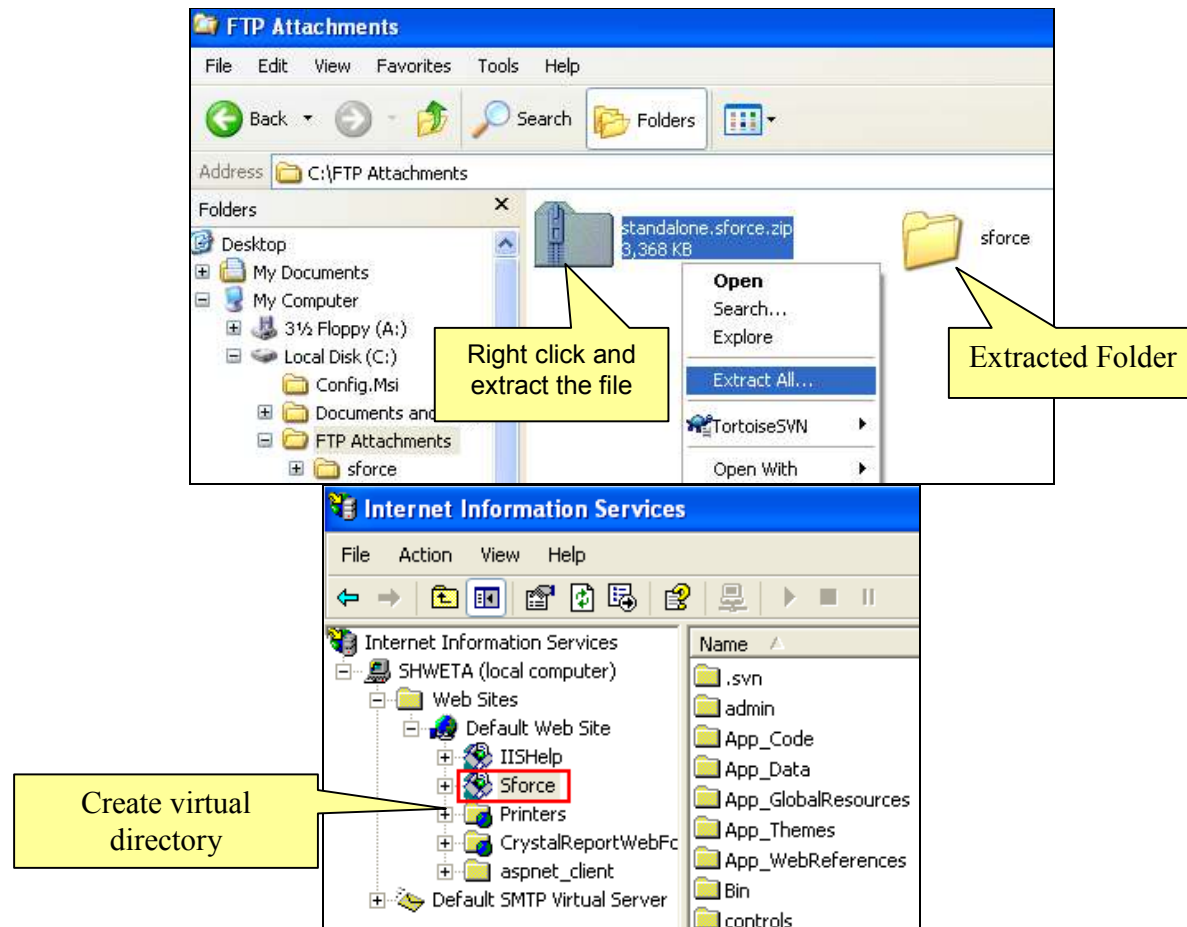


Figure. 7.1.1 Creating Virtual Directory

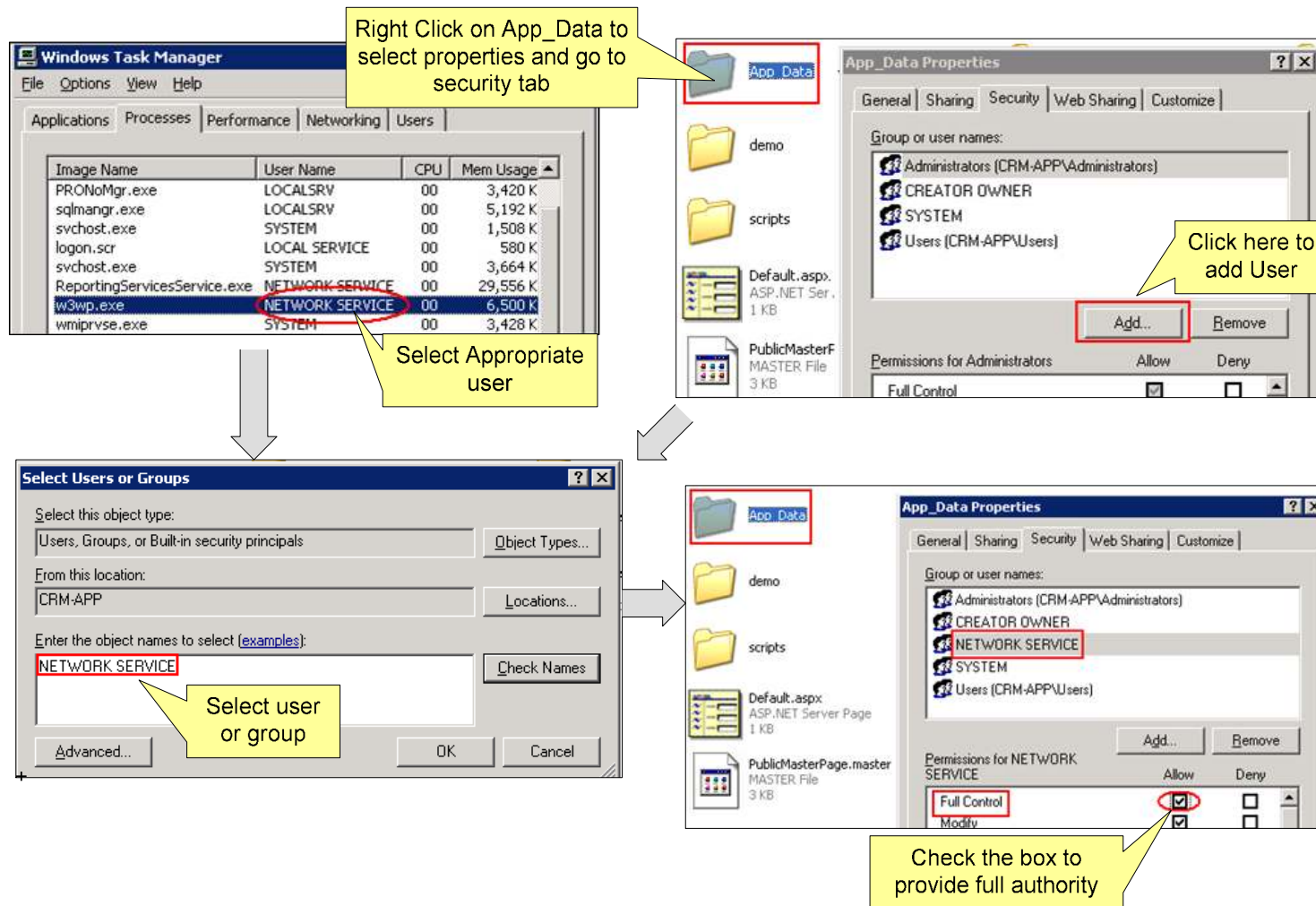


Figure. 7.1.2 Configuring Permissions

## 9. 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.

- 1) Go to your Salesforce account and then go to Setup/Create/Objects/FTP Attachment. Let's say 'YourObject' is a custom object .So, it's API reference is called "YourObject\_\_c" by Salesforce.
- 2) Click New in the Custom Fields & Relationships section of the page.
- 3) Choose the type of field as Lookup Relationship and click Next.
- 4) Create a lookup relationship field in the FTP Attachments object for 'YourObject' with the name say 'YourObject' ,because it is a custom field 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'.
- 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.
- 6) After creating link/button add it to the page layout of the custom object as described in the chapter 6. Now, you are ready to use FTP Attachments™ with that custom object.(Chapter 6)



**Setup**

**Custom Objects**

Custom objects are database tables that allow you to store data specific to your organization to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, can also access custom object data through the Apex API.

**New Custom Object**

Action	Label	Master Object	Deployed	Description
<a href="#">Edit</a>	FTP Attachment		✓	This object contains the d
<a href="#">Edit</a>	FTP Attachment Access Log	FTP Attachment	✓	This object stores the log
<a href="#">Edit</a>	FTP Attachment Version	FTP Attachment	✓	This object represents the
<a href="#">Edit</a>	Quotation		✓	This object will be a pare
<a href="#">Edit</a>	Quotation Item	Quotation	✓	This object will contain it
<a href="#">Edit</a>	Quot			
<a href="#">Edit</a>	Quot			
<a href="#">Edit</a>	Sett			
<a href="#">Edit</a>	Your			object

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

- ☐ None Selected: Select one of the data types below.
- ☐ Auto Number: A system-generated sequence number that uses a display format record.
- ☐ Formula: A read-only field that derives its value from a formula expression y change.
- ☐ Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value related list.
- ☒ **Lookup Relationship**: Creates a relationship that links this object to another object. The re from a popup list. The other object is the source of the values in the

**Step 2. Choose the related object**

Select the other object to which this object is relat

**Related To** **YourObject**

**Step 3. Enter the label and name for lookup field**

Field Label: **YourObject**

Field Name: **YourObject**

Description: Write your description here

Help Text:

**Create**

**Objects**

**Click edit to create new custom field under Custom object YourObject**

**Click to create new custom field**

**Create a lookup relationship for YourObject.**

Figure 9.1 Creating Custom object in Salesforce

## 10. 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.

### How to use the tool?

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 enigma account:

In order to configure these settings:

1. Login to your Enigma 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.



Default Salesforce user for FTP Attachments Migrator

Login:

Password:

Figure 10.1 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.
  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.

**File Name Settings**

Record was successfully added to the system.

Additional characters allowed:

Extensions Allowed/Denied:  ☒ Allow ☐ Deny

Please enter coma seperated extensions e.g. txt,jpg,zip

Is Duplicate File Name Allowed? ☒

Allow or Deny files with specified extensions

Figure 10.2 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.

**FTP Attachments Migrator Settings**

Record was successfully added to the system.

Select Object:

Comment:

Add Field To Folder:

Storage Folder:

Limit:

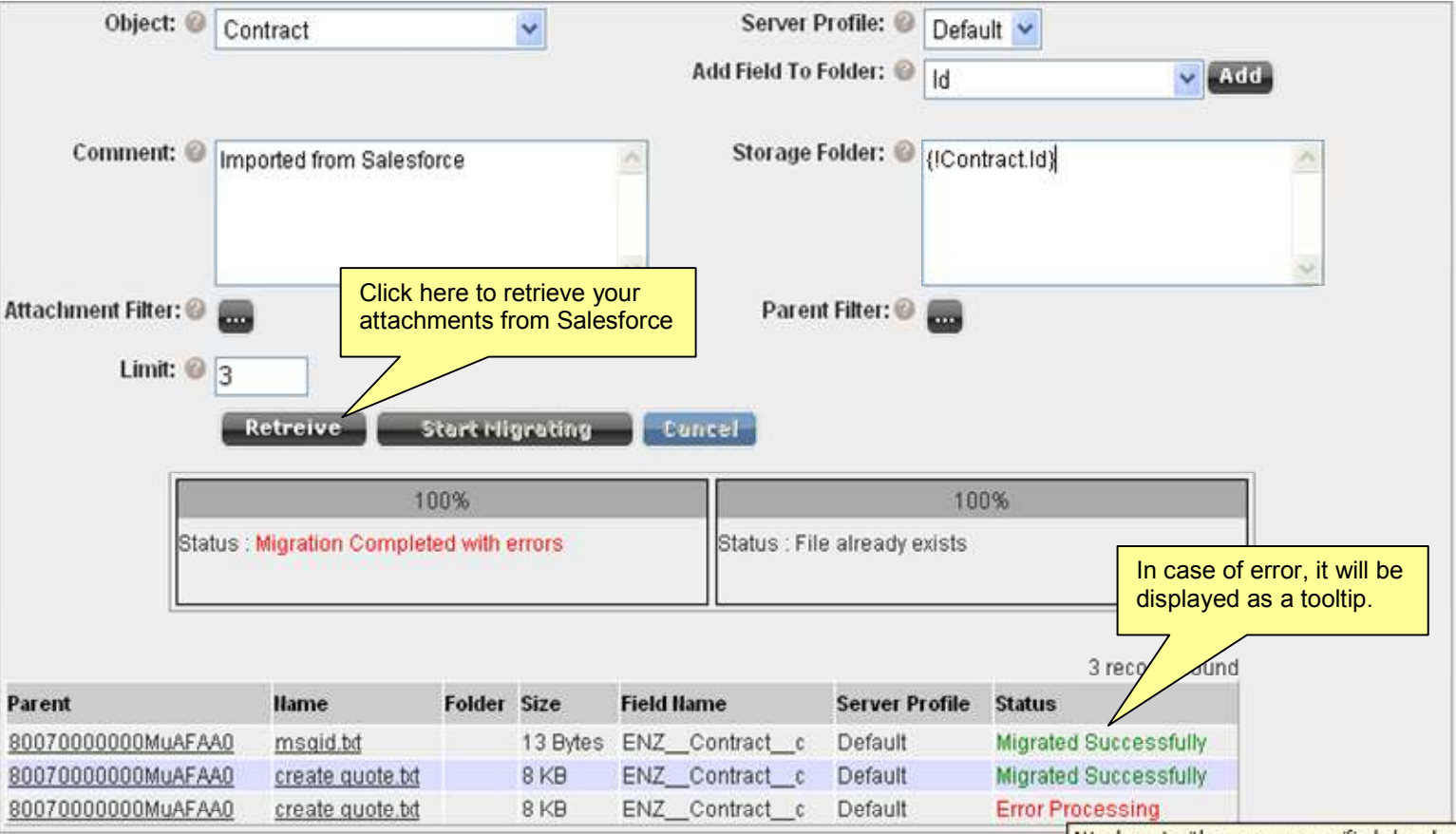
Object Name	Comment	Folder	Limit
Account	test	test	30
Case	Case from Salesforce	Cases\{!Case.CaseNumber}	100

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.
2. **Comment:** Comment will be displayed in all migrated attachments.
3. **Add Field To Folder:** Use Salesforce merge fieldnames to create folder name at runtime(e.g. Cases\{!Case.CaseNumber})
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.
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:

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

Refer Figure. 9.2 For further explanation:



Object:  Server Profile:

Add Field To Folder:

Comment:  Storage Folder:

Attachment Filter:  Parent Filter:

Limit:

100% Status: Migration Completed with errors

100% Status: File already exists

In case of error, it will be displayed as a tooltip.

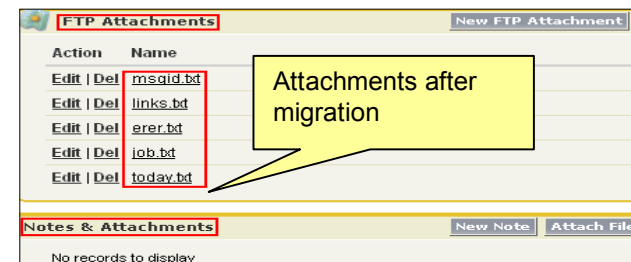
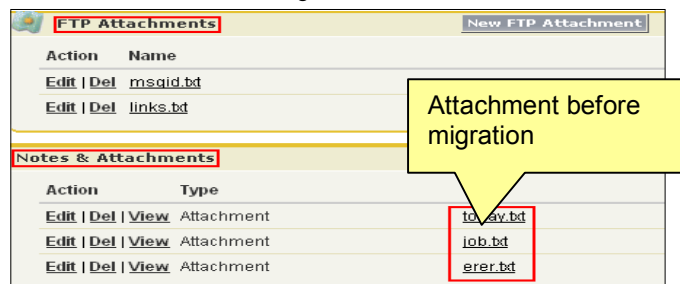
Parent	Filename	Folder	Size	Field Name	Server Profile	Status
800700000000MuAFAAQ	msgid.txt		13 Bytes	ENZ__Contract__c	Default	Migrated Successfully
800700000000MuAFAAQ	create quote.txt		8 KB	ENZ__Contract__c	Default	Migrated Successfully
800700000000MuAFAAQ	create quote.txt		8 KB	ENZ__Contract__c	Default	Error Processing

Attachment with name you specified already exists.

Figure. 10.1 Migrator Tool in use

Following are the guidelines regarding use of FTP Attachments™ Migrator with respect to Figure 10.1:-

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.
2. **Comment:** Comment you specify here will be applied to all the attachments which are migrated to FTP Attachments™.
3. **Attachment Filter:** You can specify criteria here to filter the attachments. Only attachments matching this criteria will be retrieved from Salesforce for migration.
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.
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.
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.
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.
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 this criteria should return not more than 500 records for best results.



## 11. Using FTP Attachments™ Pro Self Service Portal

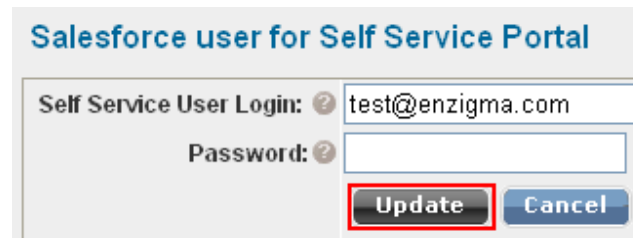
You can now use FTP Attachments™ Pro in your Self Service Portal. For configuring your Self Service Portal follow the instructions below.

Login to your Enigma account by clicking on [www.enigma.com/sforce/login.aspx](http://www.enigma.com/sforce/login.aspx). Use your Enigma Login and password.

- 11.1 In the Subscription page click on the “Settings” button against FTP Attachments™ Pro. Here you need to provide necessary information about your Self Service settings by clicking on the “Self Service Portal Settings”
- 11.2 To change the settings click on “Edit”
- 11.3 Now move on to your Salesforce setup
- 11.4 In “Setup” select Customize/Self-Service/Self-Service Portal option.
- 11.5 Click on “Settings” option from Self-Service Portal
- 11.6 Copy the entire code generated in the FTP Attachments™ Pro, in the Page Header, Solution page and View Cases Page.

### Salesforce User Setup (Figure 11.1):

1. **Self Service User Login:** Please enter a valid Salesforce User Login who has rights to create FTP Attachments on Case, this user will be used to create/update/delete the attachments from the Self Service Portal on behalf of Self Service Portal users.
2. **Password:** Please enter a valid Salesforce User Password who has rights to create FTP Attachments on Case, this user will be used to create/update/delete the attachments from the Self Service Portal on behalf of Self Service Portal users.



**Salesforce user for Self Service Portal**

Self Service User Login: ? test@enigma.com

Password: ?

**Update** **Cancel**

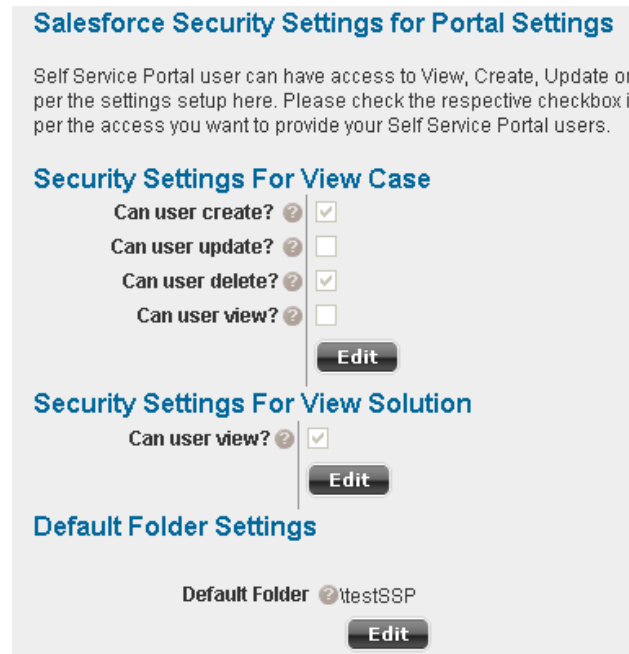
Figure 11.1 Salesforce User



**Security Settings for Self Service Portal (Figure 11.2):**

1. **Can User create?** : Allow or deny SSP user to create attachments in Case.
2. **Can User update?** : Allow or deny SSP user to update attachments in Case.
3. **Can User delete?** : Allow or deny SSP user to delete attachments in Case.
4. **Can User View?** : Allow or deny SSP user to view attachments in Case.
5. **Can User view?** : Allow or deny SSP user to view attachments in Solution.
6. **Default Folder:** Attachments attached from Self Service Portal will be stored under folder structure specified here.

**Note:** In order to use this folder for storing attachments from Portal, please make sure you have removed/cleared folder name specified in the URL of Attach button.



**Salesforce Security Settings for Portal Settings**

Self Service Portal user can have access to View, Create, Update or per the settings setup here. Please check the respective checkbox in per the access you want to provide your Self Service Portal users.

**Security Settings For View Case**

Can user create?	<input checked="" type="checkbox"/>
Can user update?	<input type="checkbox"/>
Can user delete?	<input checked="" type="checkbox"/>
Can user view?	<input type="checkbox"/>

**Edit**

**Security Settings For View Solution**

Can user view?	<input checked="" type="checkbox"/>
----------------	-------------------------------------

**Edit**

**Default Folder Settings**

Default Folder

**Edit**

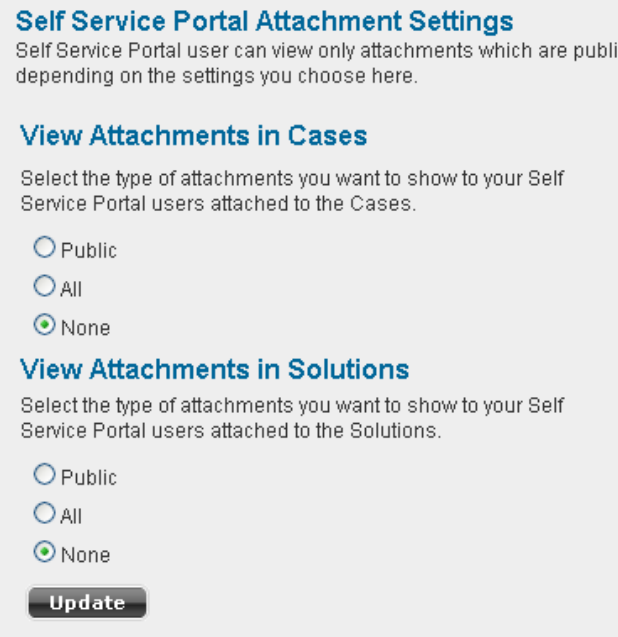
**Figure 11.2 Security Settings For Self Service Portal**

**Attachments settings for Portal:****a) View Attachments in Cases**

- 1) **Public** : Check this value if you want to allow SSP user to view attachments which are marked as “Public”
- 2) **All** : Allow user to view all attachments from Cases
- 3) **None** : Deny access to all attachments from Cases

**b) View Attachments in Solutions**

- 1) **Public** : Check this value if you want to allow SSP user to view attachments which are marked as “Public”
- 2) **All** : Allow user to view all attachments from Solutions
- 3) **None** : Deny access to all attachments from Solutions



**Self Service Portal Attachment Settings**  
Self Service Portal user can view only attachments which are public depending on the settings you choose here.

**View Attachments in Cases**  
Select the type of attachments you want to show to your Self Service Portal users attached to the Cases.

☐ Public  
☐ All  
☒ None

**View Attachments in Solutions**  
Select the type of attachments you want to show to your Self Service Portal users attached to the Solutions.

☐ Public  
☐ All  
☒ None

**Update**

**Figure 11.3 Attachments Settings**

### Self Service Portal Settings Helper

Your server URL:

**Warning:** If your server url is not https based your customers may receive security warnings they will try to access the Self Service Portal.

**Page Header:**   
[Copy](#) [Submit](#)

**View Solution Page:**   
[Copy](#)

**Case Attachment Folder:**

Salesforce Merge fields can be used to generate folder name based on record & Self Service User fields can be used for merge fields.

**Server Profile:**

**View Case Page:**   
[Copy](#)

### Portal Page Sections

Action	Portal Section Name
<a href="#">Edit</a>   <a href="#">Preview</a>	Page Header
<a href="#">Edit</a>   <a href="#">Preview</a>	Page Footer

### Portal Pages

Action	Portal Page Name
<a href="#">Edit</a>   <a href="#">Preview</a>	Login Page
<a href="#">Edit</a>   <a href="#">Preview</a>	Home Page
<a href="#">Edit</a>   <a href="#">Preview</a>	Solution Page
<a href="#">Edit</a>   <a href="#">Preview</a>   <a href="#">Page Layout</a>	Log a Case Page
<a href="#">Edit</a>   <a href="#">Preview</a>   <a href="#">Page Layout</a>	View Cases Page

Figure. 11.4 Copy and paste code from Enigma account to Salesforce

Following are the help tips for using Self Service Portal Settings Helper with respect to Fig. 11.4

1. **Your Server URL:** Enter correct base URL where your application is installed. Note that if the server is not https based the customer will receive a warning regarding the same, every time he access the Self Service Portal. Click on “Submit”. The code will be generated automatically.
2. **Page Header:** Click on the “Edit” option of the Page Header in the Portal Page Section. Check the “Show HTML” option and the “Show Header” option and copy the entire Page Header code in the Header Detail.

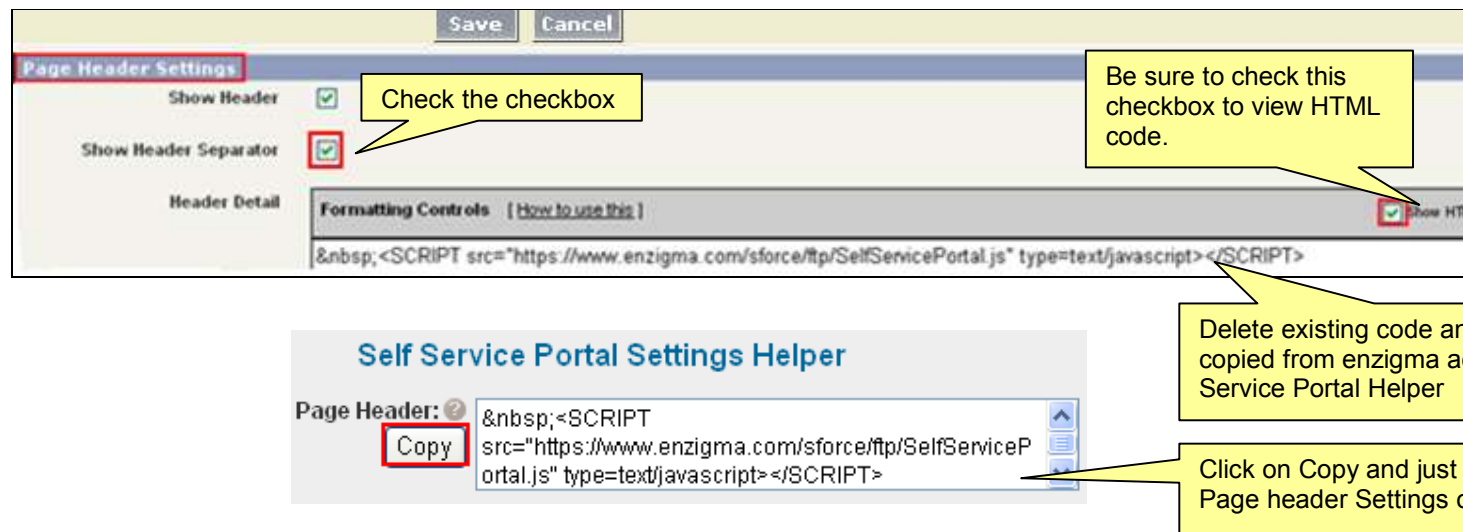


Fig. 11.5 Page Header of Self- Service Portal in Salesforce

3. **View Solutions Page:** Copy the code for “Page Solution” in Portal Page Name in the same way as explained in 2.
4. **Case Attachment Folder:** Name of the folder for Case Attachments
5. **Server Profile:** Server name where attachments need to be stored.
6. **View Case Page:** Copy the code for “View Cases Page” in Portal Page Name in the same way as explained in 2.
7. Save the code by clicking the “Save” button on your Salesforce page.
8. A sample which shows all the attachments in a Case in the Self Service Portal linked through FTP Attachments™ is given below:

**Attachments** Powered by Enigma

Name	Size	Created Date
1Enterprise.doc	78 KB	
enzigma.snk	596 Bytes	

Click to view attachments from cases

Attachments Listed

**Case 00001047**

Case Number: 00001047 Date/Time Opened: 6/17/2008 6:57 AM

Type: Date/Time Closed:

Contact Phone:

Contact Email: [stforces@enzigma.com](mailto:stforces@enzigma.com)

Subject: job

Description:

**Solution Detail**

**GenWatt SLA Commitments**

GenWatt offers four different SLAs with different service commitments as follows:

- 1) PLATINUM
  - High priority cases: 2 hours
  - Medium and low priority cases: 6 hours
- 2) GOLD
  - High priority cases: 4 hours

You can also view Details of particular solution

**Find Solution**

Search for: Solutions/00000001/Enzigmar-FTP.txt in All Solutions Find Solution

Click to view Solutions

**Search Solutions**

Search Results for: "Solutions/00000001/Enzigmar-FTP.txt"

Search Results in "All Solutions"

**Uncategorized (6)**

Search Results in "All Solutions" and Subcategories

Score	Solution Title	Related Cases	Last Modified Date
100%	<a href="#">FTP Attachments</a>	1	5/4/2007
28%	<a href="#">Selecting the Right Generator for Your Needs</a>	0	7/22/2006
26%	<a href="#">GC1020 Portable Generator Switch Malfunctioning</a>	0	7/22/2006
24%	<a href="#">GenWatt Installation Services</a>	0	7/22/2006
13%	<a href="#">GC3000 Series Propane Generator Ignition</a>	0	7/22/2006

**Attachments** Powered by Enigma

None Found

**FTP Attachments**

Action	Name
Edit   Del	today.bt
Edit   Del	erer.bt
Edit   Del	today-update.bt
Edit   Del	job.bt
Edit   Del	Enzigmar.bt

You can view your attachments under case

Click here to add new attachment to case

Fig. 11.6 Final Layout of Self Service Portal

## 12. Using FTP Attachments™ Send Email <sup>Beta</sup> Functionality

### Overview:

Using Send Email <sup>Beta</sup> 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 <sup>Beta</sup> 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 <sup>Beta</sup> 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](mailto:support@enzigma.com).

### Configuring settings for Send Email <sup>[Beta]</sup>:

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.

#### Figure 12.1 Salesforce User:

1. Valid Salesforce users Login
2. Salesforce account password

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 Attachment™ 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 name and password supplied here has rights to the FTP Attachment™ which are sent out.

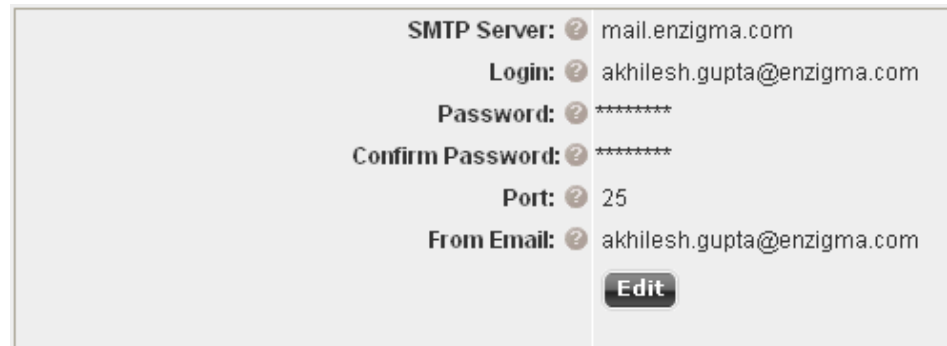


Figure 12.1 Salesforce User

**Figure 12.2 SMTP Server Settings:**

1. **SMTP Server:** Name or IP address of the SMTP server you want to use
2. **Login:** Login ID for the server specified
3. **Password:** Password for the server specified
4. **Confirm Password:** Re-type your password for confirmation
5. **Port:** Port no. used to connect to your SMTP Server for communication. Default for SMTP is 25.
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.



SMTP Server:	?	mail.enigma.com
Login:	?	akhilesh.gupta@enigma.com
Password:	?	*****
Confirm Password:	?	*****
Port:	?	25
From Email:	?	akhilesh.gupta@enigma.com
<a href="#">Edit</a>		

**Figure 12.2 SMTP Server Settings**

**Figure 12.3 Search Layout Settings:**

1. **Object:** Salesforce object from where fields are to be set in the search layout.
2. **Default Field:** Default field that is already specified in search layout (e.g. Name)
3. **Available Fields:** Available fields from the Salesforce object selected in 1.

**NOTE:** Only searchable fields from selected object will display



4. **Selected Fields:** Fields which are to be placed in Search Layout that are selected by user.

**NOTE:** You can also select multiple fields as shown in Figure 12.2. Then click Add.

Fields specified under Search fields for each object will appear in the layout when you search for the attachments from object, using Search Record button from Send Email. Otherwise, default fields for each field will appear in search layout.

**Search Layout Settings**

Case

Default Field: CaseNum

Available Fields

Deleted

Contact ID

Account ID

Asset ID

Name

Email Address

Phone

Company

Case Type

Status

Case Origin

Add

Remove

Update

Case Reason

**Search Fields**

Name	SearchFields
Opportunity	Name, Opportunity ID, Description
Case	Case Number, Case ID, Case Reason
Contact	Full Name, First Name, Last Name, Email

**Attach File**

Opportunity: Final Test

To:

cc:

Bcc:

Subject: test merge fields

Send mail through: ☐ Salesforce ☒ SMTP ☐ Importance: High ☒ Record to Salesforce

Attachments: test.txt ( 4 Bytes )

Expiry Date: 08-06-2008

Select Record

**Search Object**

Search All: Contact

Keyword: sh

Search

Name	First Name	Last Name	Email
Hemanshu Shah	Hemanshu	Shah	

Figure 12.2 Search Layout Settings

**Figure 12.3 SMTP Server Settings:**

1. **SMTP Server:** Name or IP address of the SMTP server you want to use
2. **Login:** Login ID for the server specified
3. **Password:** Password for the server specified
4. **Confirm Password:** Re-type your password for confirmation
5. **Port:** Port no. used to connect to your SMTP Server for communication. Default for SMTP is 25.
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.



SMTP Server:	mail.enigma.com
Login:	akhilesh.gupta@enigma.com
Password:	*****
Confirm Password:	*****
Port:	25
From Email:	akhilesh.gupta@enigma.com
<a href="#">Edit</a>	

**Figure 12.3 SMTP Server Settings**

**Figure 12.4 Default Email Settings:**

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 can not exceed this limit.
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 <sup>Beta</sup> functionality.

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



**Figure 12.4 Email Default Settings**

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 enigma account, now you are ready to use Send Email<sup>Beta</sup> feature.

#### Using Send Email<sup>Beta</sup> 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.

### Send Email (Beta)

**Opportunity:** Test new **Select Template** **Attach Files**  
**To:** To@yahoo.com  
**cc:** cc@rediffmail.com  
**Bcc:** Bcc@gmail.com  
**Subject:** test merge fields

**Send mail through:** ☐ Salesforce ☒ SMTP ☐ Importance: High ☒ Record to Salesforce


**Attachments:** myTest.txt (24 Bytes)

**Send Mail** **Send Mail & Close** **Cancel** **Preview**

Text HTML

Paragraph B I U ab x<sup>2</sup>

0000DXX 0017000000NBgxxAAD 0017000000NBgxxAAD




Design HTML

Type	Name	Size	ExpiryDate
Link	msgid.txt	13 Bytes	08-30-2008
Attachment	myTest.txt	24 Bytes	08-30-2008

Figure 12.5 Send Email

**Guidelines for Figure 12.5**

- 1) **To:** Receiver of the mail
- 2) **Cc:** Carbon copy of mail will be sent to all the recipients listed here
- 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.
- 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
- 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.
- 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.  
**NOTE:** Make sure to add Activity History to the page layout of the object under Related List Section.

Activity History						
<a href="#">Log A Call</a> <a href="#">Mail Merge</a> <a href="#">Send An Email</a> <a href="#">View All</a> <a href="#">Activity History Help</a> 						
Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	Email: test merge fields	<a href="#">Peter Maier</a>	✓	7/7/2008	<a href="#">Akhilesh Gupta</a>	7/7/2008 12:26 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Email:	<a href="#">Peter Maier</a>	✓	7/7/2008	<a href="#">Akhilesh Gupta</a>	7/7/2008 12:12 AM

**Figure 12.6 Mail recorded to Salesforce**

- 7) **Preview:** Preview your mail before sending.  
Refer figure given below:

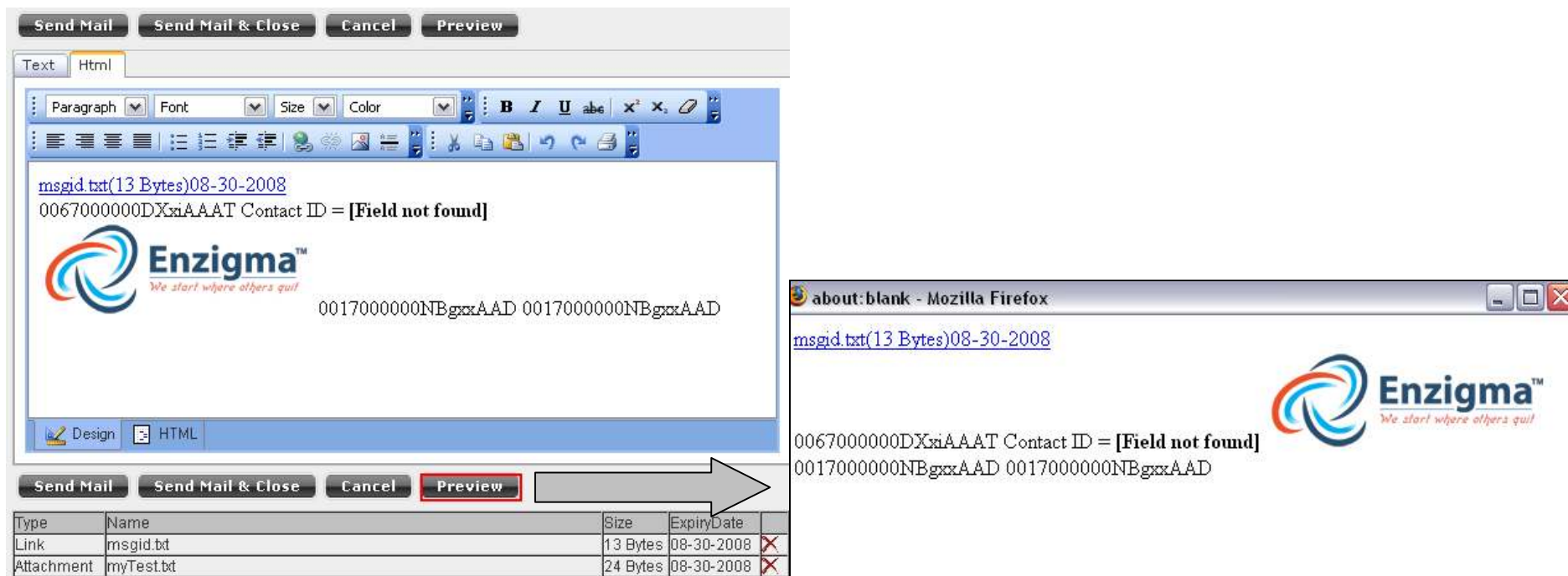


Figure 12.7 Preview

Some points regarding Send Email <sup>Beta</sup>:

1. You can apply your Salesforce templates to your mails.
2. You can also specify values for To, Cc, Bcc and From addresses in the URL of the Send Email button or link. If the object through which you want to Send Email does not contain these details, values passed through URL will be considered. Otherwise, they will be replaced with values from object.

For e.g.: Consider the link specified below:

[http://enigma.yourcompany.com/sforce/ftp/SendEmail.aspx?ID={!Account.Id}&OrgID={!\\$Organization.Id}&SFUrl={!API.Partner\\_Server\\_URL\\_100}&SFSessionID={!API.Session\\_ID}&to=to@gmail.com&cc=cc@yahoo.com, cc@rediff.com&bcc=bcc@yahoo.com, bcc@rediff.com&from=from@yahoo.com](http://enigma.yourcompany.com/sforce/ftp/SendEmail.aspx?ID={!Account.Id}&OrgID={!$Organization.Id}&SFUrl={!API.Partner_Server_URL_100}&SFSessionID={!API.Session_ID}&to=to@gmail.com&cc=cc@yahoo.com, cc@rediff.com&bcc=bcc@yahoo.com, bcc@rediff.com&from=from@yahoo.com)



## Details about Send Email:



Figure 12.8 Select Template

1. **Template Folder:** Choose a predefined Email template. Choose a folder and select a template from the folder. (Go to Personal Setup/Email/My Templates in Salesforce to view your templates.) **NOTE: Wrong merge fields from template will be replaced with [Field not found].**
2. **Template:** Templates available in selected Template Folder.

Select Template and click on Select Template to apply selected Template to email.

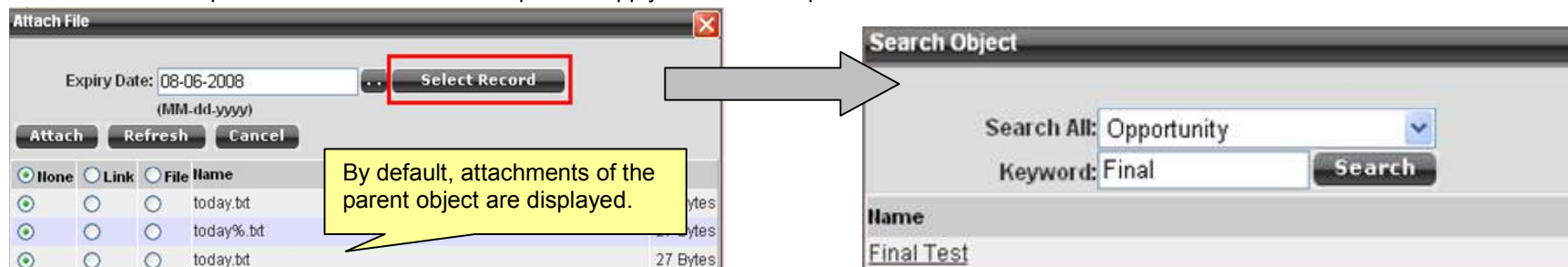


Figure 12.9 Attach File

1. **Expiry Date:** Expiration date for the attachments to be sent as a link. Default is 30 Days (you can also set this default in your settings), the link expires in that many days and email recipient will not be able to download the attachments after that.
2. **Select Record:** To select attachments from different objects click Select Record. For customizing search layout, refer Configuring settings for Send Email <sup>Beta</sup> (Figure 12.1)
3. **Search All:** Select Salesforce object from which you want to select attachments. **NOTE:** Only objects linkable to FTP Attachments™ will be visible here.
4. **Keyword:** Specify the word or phrase to search for. Objects containing search keywords will be returned as a result. **NOTE:** Search string should be atleast 2 characters long.



### 13. Configuring FTP Attachment Storage Server as Amazon S3

- 1) To get Amazon S3 working, first you should get FTP Attachments working with a FTP Server or Local Server
- 2) Once FTP Attachments is working for you with FTP/Local server all you have to do is change settings to use Amazon S3 server as storage server
- 3) To this go to your Enigma account in your Standalone server if you are using one otherwise go to [www.enigma.com/sforce/](http://www.enigma.com/sforce/)
- 4) Now click on “Settings” button next to your FTP Attachments subscription
- 5) Now edit the setting and choose Amazon S3 as Storage server
- 6) Enter Amazon S3 keys and bucket name you would like to use
- 7) Save the settings, at this time it will try connecting to Amazon S3 using credentials given by you and if it is successful save the settings or give you appropriate error.
- 8) Once it is saved any attachment you attach/view using FTP Attachment will be on Amazon S3 account you specified in the settings.



FTP Attachments Pro Settings

**Default Storage Server**  
This server will be used as default server to store your attachments.

[Supported Servers>>](#)

**Organize Attachments in Folders:** You can organize attachments in different folders using Folder paramter of the Attach link

[Example>>](#)

Connected to your Amazon S3 account successfully.

Server Type: ① AmazonS3

Profile Name: ② Default

Login: ③ 02B5XS2S2J8

Password: ④ \*\*\*\*\*

Max. File Size: ⑤ 2048

Default Folder: ⑥

[Edit](#) [Test Settings](#)

Verify your server settings by testing. If you are successfully connected, then settings are correct.

Figure 13.1 Amazon Server Settings

- 1) **Server Type** : Select the server type as “Amazon S3”
- 2) **Profile Name**: Select the appropriate server profile on which you want to store your attachments. This is applicable only if you have more than one Server.
- 3) **Login**: Amazon Access Key ID as a login
- 4) **Password**: Secret Access key ID for Amazon account
- 5) **Max. File Size**: Maximum size of file that can be uploaded
- 6) **Default Folder**: Name of bucket on Amazon S3, where attachment needs to be stored.

**Note:** If this field is left blank default bucket with the name as OrgId will be created on the Amazon server and used for storing attachments. If Bucket name is specified, bucket should be already created on Amazon server.