

ATTACHMENT CONVERTER

USER MANUAL



ASTREA IT SERVICES

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C-52 Sector 65

NOIDA, INDIA

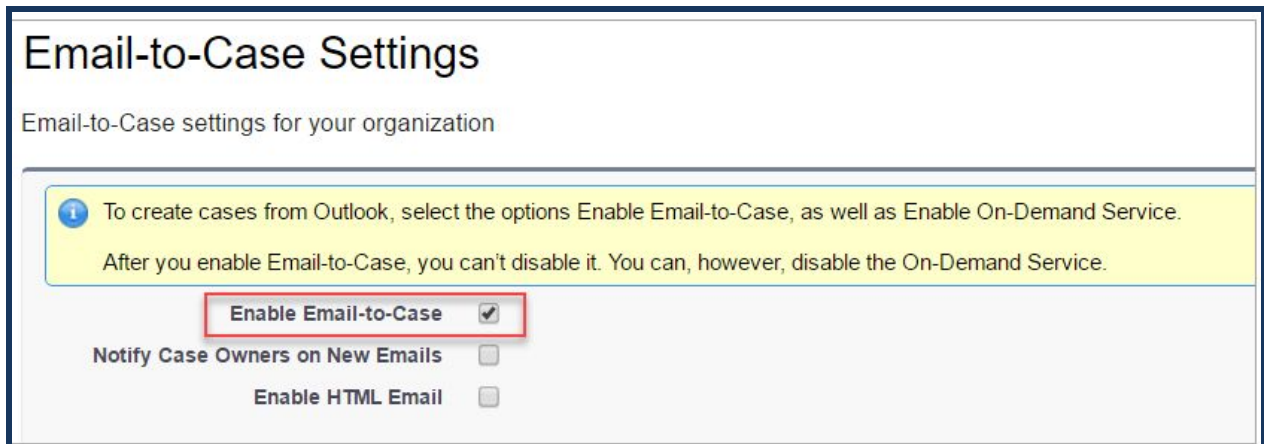
OVERVIEW:

Attachment Converter is an app which converts the salesforce attachments into Files. This app is useful because in winter '18 users would not be able to upload an attachment in the 'Notes and Attachment' related list.

This app provides the functionality for converting attachments into Files for both standard objects (where notes and attachments are supported) as well as for custom objects. It also provides user to delete their old attachments after conversion. This app is accessible for the admins of Salesforce Org only. This app supports the standard objects such as Account, Contact, Opportunity, Case, Solution, Product2, Lead, Campaign, Asset, Contract, Event and Task and custom objects if any.

Prerequisite Settings:

1. Enable the Email-to-Case setting . For this Go to **Setup > cases > Email-to-Case > Edit > check the checkbox Enable Email-to-Case > Save.**



Email-to-Case Settings

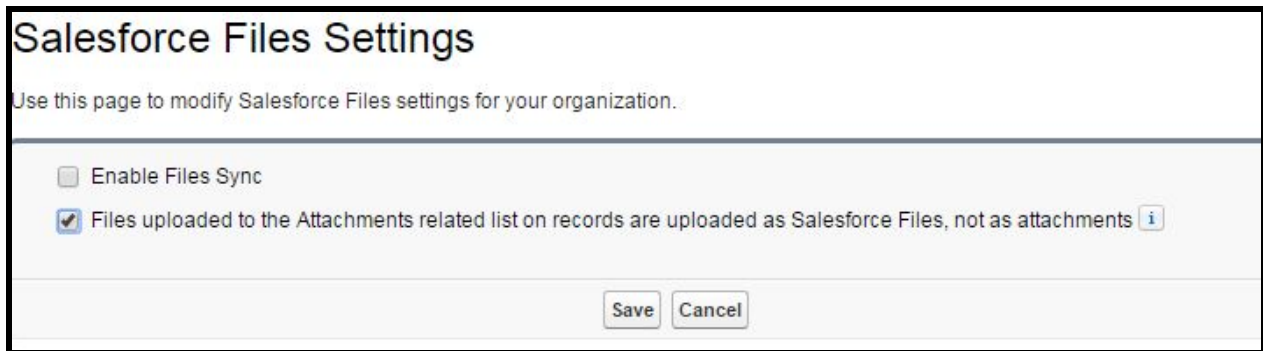
Email-to-Case settings for your organization

Enable Email-to-Case ☒

Notify Case Owners on New Emails ☐

Enable HTML Email ☐

2. This app is accessible for the admins of Salesforce Org only. So select Install for admins only checkbox while installing.
3. Kindly add related list section for the 'File ' in page layout of objects.
4. In future attachments are to be uploaded as file. **(Optional)**. For this go to **Setup> General setting > Edit> enable the checkbox> save**.



Steps to be followed and Sample Screenshots :

ConvertObjectAttachment :

The functionality of this tab includes the conversion of selected objects into the Files. This tab displays the checkboxes besides the object name to select the object for which the user wants the conversion and it also displays the total number of attachments owned by the login user for the selected objects which have not been converted into Files. The stats shown on page are user specific.

Step1: Select the checkbox for the object and click on the convert button.

Recommended if you choose one object at a time for tracing.

Pankhuri Jain
Setup
Help
AttachmentConverter

Home
ConvertObjectAttachments
DeleteObjectAttachments
ConvertAttachmentsFileLogs
+

Create New...

Recent Items

- TestRec
- Pankhuri Jain
- test1
- test12"> test13">
- test11">
- test1
- test16"> test17">
- test15">

Recycle Bin

Enable Conversion of Attachment For Specific Objects

Enable the checkboxes besides the object names for which all attachments needs to be converted to files. At First only 1000 attachments are to be converted.For converting more than 1000 attachments click again on the convert button. Users can only convert the attachments owned by them.

Select	Select Object	Total Attachments To Convert
☐	Account	101
☒	Contact	3000
☐	Opportunity	3
☐	Lead	0
☐	Campaign	0
☐	Asset	0
☐	Case	0
☐	Contract	0
☐	Event	0
☐	Product2	0
☐	Solution	0
☐	Task	0

Note: The limit of how many versions published in 24 hour period varies from 2,500 - 36000. The attachments statistics are user specific. Users can only convert the attachments owned by them.

Convert

Step 2: After clicking on the convert button attachments will be converted into the Files. Stats on 'Total attachments To Convert' column will get updated accordingly. It will only show the count of attachments for which file conversion is not done.

Pankhuri Jain
Setup
Help
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Home
ConvertObjectAttachments
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+

Create New...

Recent Items

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Recycle Bin

Enable Conversion of Attachment For Specific Objects

Enable the checkboxes besides the object names for which all attachments needs to be converted to files. At First only 1000 attachments are to be converted.For converting more than 1000 attachments click again on the convert button. Users can only convert the attachments owned by them.

Select	Select Object	Total Attachments To Convert
☐	Account	101
☒	Contact	500
☐	Opportunity	3
☐	Lead	0
☐	Campaign	0
☐	Asset	0
☐	Case	0
☐	Contract	0
☐	Event	0
☐	Product2	0
☐	Solution	0
☐	Task	0

Note: The limit of how many versions published in 24 hour period varies from 2,500 - 36000. The attachments statistics are user specific. Users can only convert the attachments owned by them.

Convert

Note: From 3000 attachments as shown in the previous screenshot , only 2500 attachments of 'Contact' object are converted into files and 500 are left. This is because there is a limit of how many files can be created in 24 hour period which is only 2500 in developer edition. User can check the AttachmentFileLogs to ensure successful conversion and DeleteObjectAttachments tab to check if attachments are converted.

Info*: At first only 1000 attachments are to be converted . To convert more than 1000 attachments click again on the button 'Convert'.

DeleteObjectAttachment :

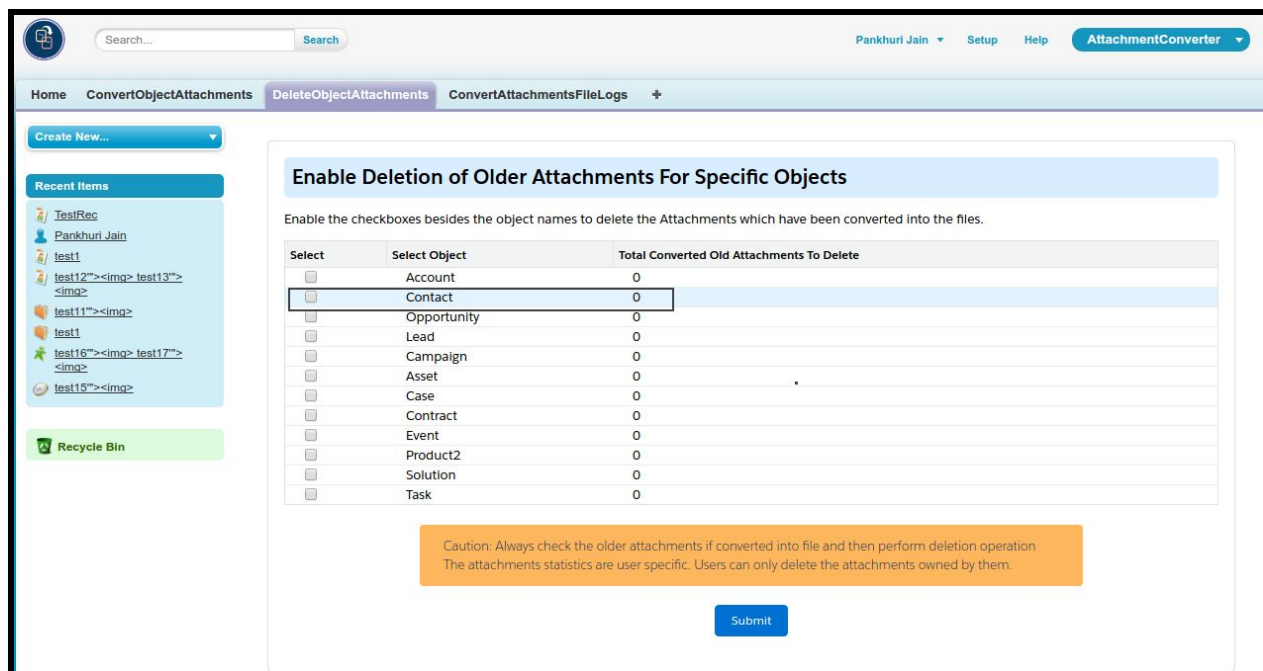
The functionality of this tab includes the enabling the checkboxes besides the object name to delete the attachments which have been converted into the files. This tab displays the checkboxes besides the object name to select the object for which the user wants the deletion and it also displays the total no of attachments for the particular objects which have been converted into the Files.

Step1: Select the checkbox for the object and click on the Submit button.

The screenshot shows the Salesforce AttachmentConverter interface. The top navigation bar includes a search bar, user name 'Pankhuri Jain', 'Setup', 'Help', and a dropdown menu for 'AttachmentConverter'. The main navigation bar has tabs for 'Home', 'ConvertObjectAttachments', 'DeleteObjectAttachments' (which is active), and 'ConvertAttachmentsFileLogs'. On the left sidebar, there is a 'Create New...' button and a 'Recent Items' list containing various test records. Below the sidebar is a 'Recycle Bin' button. The main content area is titled 'Enable Deletion of Older Attachments For Specific Objects'. It contains a sub-header 'Enable the checkboxes besides the object names to delete the Attachments which have been converted into the files.' and a table with three columns: 'Select', 'Select Object', and 'Total Converted Old Attachments To Delete'. The table lists various Salesforce objects, with 'Contact' selected and showing 2500 attachments. A caution message at the bottom states: 'Caution: Always check the older attachments if converted into file and then perform deletion operation. The attachments statistics are user specific. Users can only delete the attachments owned by them.' A 'Submit' button is located at the bottom right of the table area.

Select	Select Object	Total Converted Old Attachments To Delete
☐	Account	0
☒	Contact	2500
☐	Opportunity	0
☐	Lead	0
☐	Campaign	0
☐	Asset	0
☐	Case	0
☐	Contract	0
☐	Event	0
☐	Product2	0
☐	Solution	0
☐	Task	0

Step 2: After clicking on button the converted attachments will be get Deleted So the 'Total Converted Old attachments To Delete' column will be updated .



ConvertAttachmentsFileLogs:

This tab generates the error logs while conversion or deletion of attachments. Any standard error while processing will show in this tab.

LIMITATIONS :

- The limit of how many versions can be published in 24 hours is **2500 in developer edition**. This can go maximum upto 36000 in other editions. Exceeding the limit will

cause the error 'ContentPublication Limit exceeded' which can be checked in **Apex jobs**.

- The app is user specific and allows users to convert only those attachments owned by him/her. Otherwise it can cause the issue 'Invalid_STATUS, Documents in a user's private library must always be owned by that user.: [OwnerId]'.
- To convert more than 50000 attachments, a user needs to delete the already converted attachments from DeleteAttachmentsTab first.