## **Convert attachments to files**

## Description

As per Salesforce, you'll no longer be able to use the Notes & Attachments related list to attach files to records after winter '18 release. You will need to use the Files related list instead. After the winter '18 release the previous attachments will remain unaffected and the new uploads will be attached as files.

As our storage layer is **Attachment**, we need to convert the existing attachments to files. We can convert the existing Attachments into Files using an app developed by 'Salesforce Lab' named **Magic Mover for Notes And Attachments to Lightning Experience** 

## **Pre Installation Steps**

- Goto Setup and enter **User Interface** in the Quick Find box.
- Click on User Interface.
- Under the <u>Setup</u> section below, search for *Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners"* user permissions checkbox.
- Enable this setting and click Save button to save these changes.

Setup	
Enable Enha	nced Page Layout Editor
Enable Enha	nced Profile List Views
📄 Enable Enha	nced Profile User Interface
Enable Stream	ming API
🖌 Enable Dyna	mic Streaming Channel Creation
<ul> <li>Enable "Set.</li> </ul>	Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User Permissions $ \mathbf{i} $
Enable Cust	om Object Truncate

## **Post Installation Steps**

- Goto Setup and enter **Permission Set** in the Quick Find box.
- Click on Permission Set.
- Create new permission set labelled as Attachments to Files Migrator.
- API name will set as per label. Save this permission set.
- In this permission set, go to *System permissions* under System section.
- Click on Edit and follow below instructions -
  - <u>System section</u>: Provide Modify All Data and Set Audit Fields upon Record Creation permissions.
  - **User Section:** Provide View All Users permission.
- Save these System permission changes.
- Now go to *Manage Assignments* and click on *Add Assignments* button.
- Assign the above permission set to the Admin user.

- Switch to **Attachments and Notes migrator** app from *App Menu*.
- Click on <u>"Attachments to Files"</u> tab.

Show items created between	9/23/2018	and	9/24/2018	by Created [
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Filter by object:	All	\$		

- Select "UFHT\_\_Ultra\_Track\_Container\_\_c" object in **Filter by object** section and set the date range to convert the attachment to files.
- Click on "Filter" button.

Show items created between	9/23/2018	and	9/24/2018	${\ensuremath{\overline{0}}}$ by Created Date ${\ensuremath{\overline{0}}}$ by Last Modified Date	Filter
Filter by object:	JFHTUltra_Track_(	Conta 🛟			

• In below section, you will see multiple options. Select **Bulk conversion by object type** (recommended) checkbox. You will get all the number of attachments present in that object to convert.

Public and Private Attachments to Convert i Convert	Converted Public and Private Attachments Retr	resh
Convert your public and private attachments as a bulk process or individually.	These attachments are now available in your org as Salesforce Files. Delete these converted attachments to free up storage space. After you delete converted attachments, you can't recover them.	
Test the conversion on a small number of records using Convert by related record ID or Convert by attachment ID. When you are	Date 9/23/2018 to 9/2/	/2018
ready to convert your attachments in batches based on the parent oblect type, use <b>Bulk conversion by oblect type</b> .	Total attachments: 1	
	Converted attachments(can be deleted): 0	
Daily limits for the number of documents and versions apply to	Unconverted attachments: 1	
create notes or files in your org until the next day See Salesforce	OBJECT QUANTITY APPROX SIZE (MB)	
Files Limits		
	No records	
Bulk conversion by object type (recommended)		
To enter multiple IDs, enter each ID on a new line or separate the IDs with commas.	Previous Next-	
Convert by attachment ID		
To enter multiple IDs, enter each ID on a new line or separate the IDs with commas.		
Date 9/23/2018 to 9/24/2018		
☑ OBJECT QUANTITY APPROX SIZE (MB) TO CONVERT		
UFHT_Ultra_Track_Containerc 1 1 1		
Previous Next. Total to convert: 1		

• Select the object and click on **Convert** button.

• Once the process will be completed, you will see details updated in "Converted Public and Private Attachments".

Converted Public and Private Attac		Refresh	
These attachments are now available in you these converted attachments to free up sto converted attachments, you can't recover t	ur org as Salesf prage space. Af hem.	orce Files. Delete ter you delete	
		Date 9/23/2018	3 to 9/24/2018
Total attachments:	1		
Converted attachments(can be deleted):	1		
Unconverted attachments:	0		
OBJECT	QUANTITY	APPROX SIZE (MB)	
UFHTUltra_Track_Containerc	1	1	â
Prov	ious Next	1	

• If you want to delete the converted attachments, then click on **delete** icon to free up your org storage.

Converted Public and Private Attack		Refresh	
These attachments are now available in you these converted attachments to free up sto converted attachments, you can't recover th	ur org as Salesf rage space. Af hem.	orce Files. Delete ter you delete	
		Date 9/23/2018	to 9/24/2018
Total attachments:	1		
Converted attachments(can be deleted):	1		
Unconverted attachments:	0		
OBJECT	QUANTITY	APPROX SIZE (MB)	~
UFHTUItra_Track_Containerc	1	1	<b></b>