

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

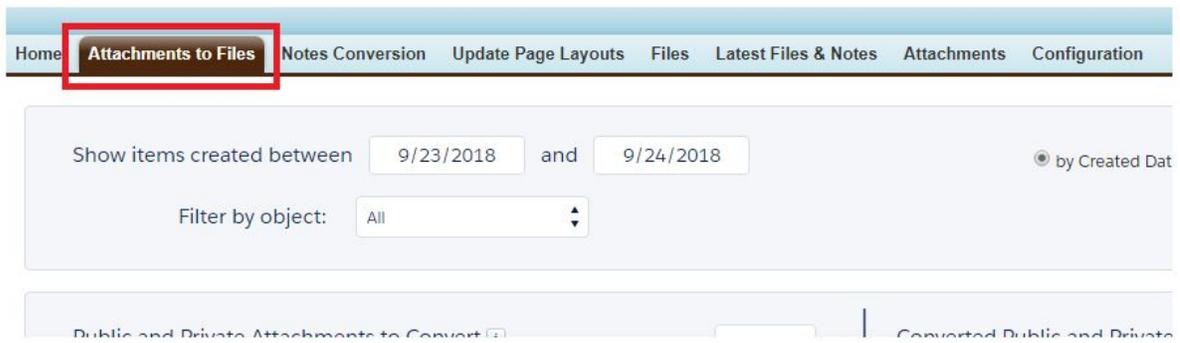
- Goto Setup and enter **User Interface** in the Quick Find box.
- Click on User Interface.
- Under the Setup section below, search for *Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners"* user permissions checkbox.
- Enable this setting and click Save button to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



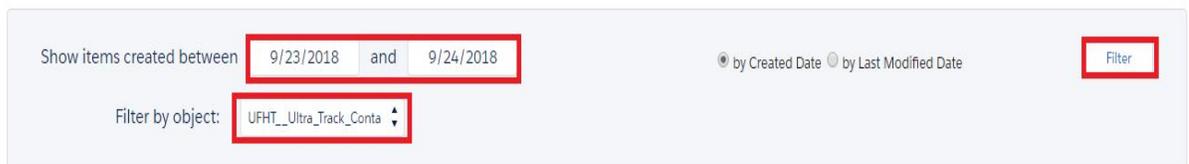
Post Installation Steps

- 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 -
 - **System section:** 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.

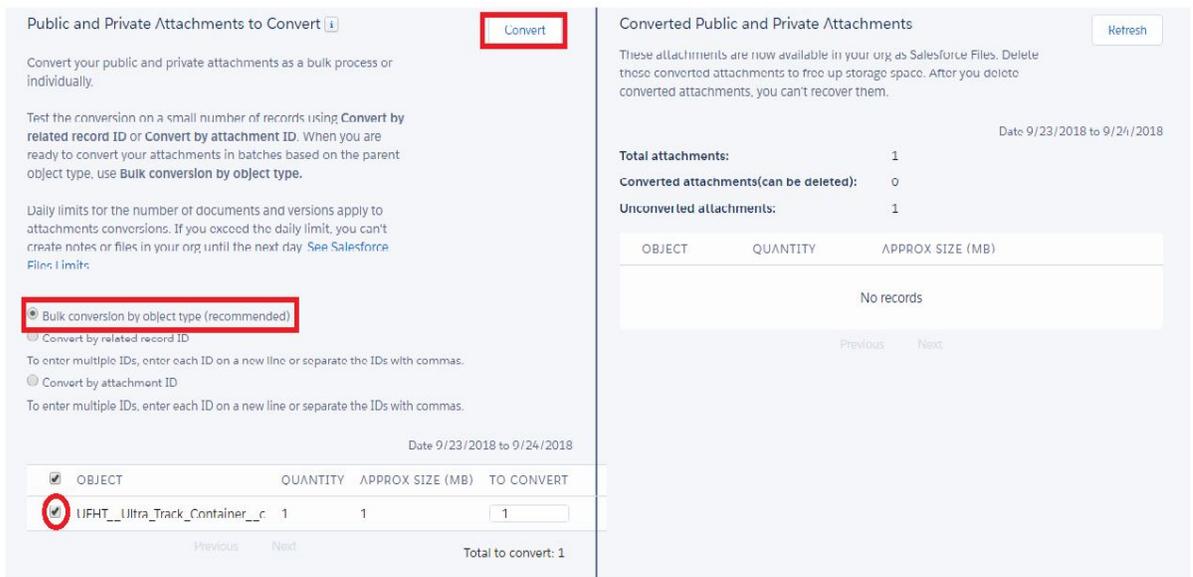
- Switch to **Attachments and Notes migrator** app from *App Menu*.
- Click on **“Attachments to Files”** tab.



- 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.



- 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.



- 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 Attachments Refresh

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.

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)	
UFHT__Ultra_Track_Container__c	1	1	

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

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