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# FTP Attachments® User Guide.

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By Orektic Solutions LLP



*FTP Attachments*®



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## I Introduction

### I.I Orektic

Orektic is known for state-of-the-art cloud-based, SAAS solutions that help our clients to transform the way they do business.

We exist to solve the critical issues facing our clients, both large and small. Our unique approach is not only what differentiates us, but also what makes us successful. We provide a broad range of services and solutions to help organizations facilitate change, achieve their vision, and optimize performance and productivity.

From implementing new business strategies to ultra-efficient work processes, Orektic is ready to tackle any challenge and put you on the path to success. With state-of-the-art cloud-based, SAAS solutions transform the way you do business.

Orektic is one of the software companies from the Enzigma group.



### I.II Enzigma LLC

Enzigma LLC is the exclusive reseller of Orektic products.





## II ▶ Product Introduction

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.





### III Product Features

#### 1. Supports Multiple Servers :

- FTP Server
- FTPS Server
- SFTP Server
- Amazon S3
- NAS

2. **Security** : Since FTP Attachments® allows storage on your personal network you can set up security as per your requirements and important or confidential documents need never leave your secure network. The highest level of SSL based encryption available in the market can be used for your files since FTP Attachments® resides in your own controlled environment.

3. **File Version** : Maintain the File versions

4. **Upload Multiple Files** : Using FTP Attachments® you can upload multiple file to your server.

5. **Configuration** : Easy to Configure.

6. **Support** : Available Support for 12x5 From Monday to Friday.

7. **Mode** : FTP Attachments can be installed On Hosted or Standalone.

- **Hosted Mode**: In this mode, application is hosted with us on ( [app.ftpattachments.com](http://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

8. **Cost benefits** : Saves you thousands of dollars in cost in case you exceed file storage limit provided by Salesforce. We offer several storage server options for you to choose from based on your need and budget.



## IV Product Versions

There are currently below editions of FTP Attachments® available:

1. **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.





## V Configuration Guide

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](http://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 purposes, you can use the application online from our website. The standalone mode has a great advantage for 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

### V.1 Installation Steps

#### V.1.1 Hosted Mode :

#### V.1.2 Installation Of Package

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

- Install The FTP Attachments Package. [Click Here](#) to Download and Install the package.

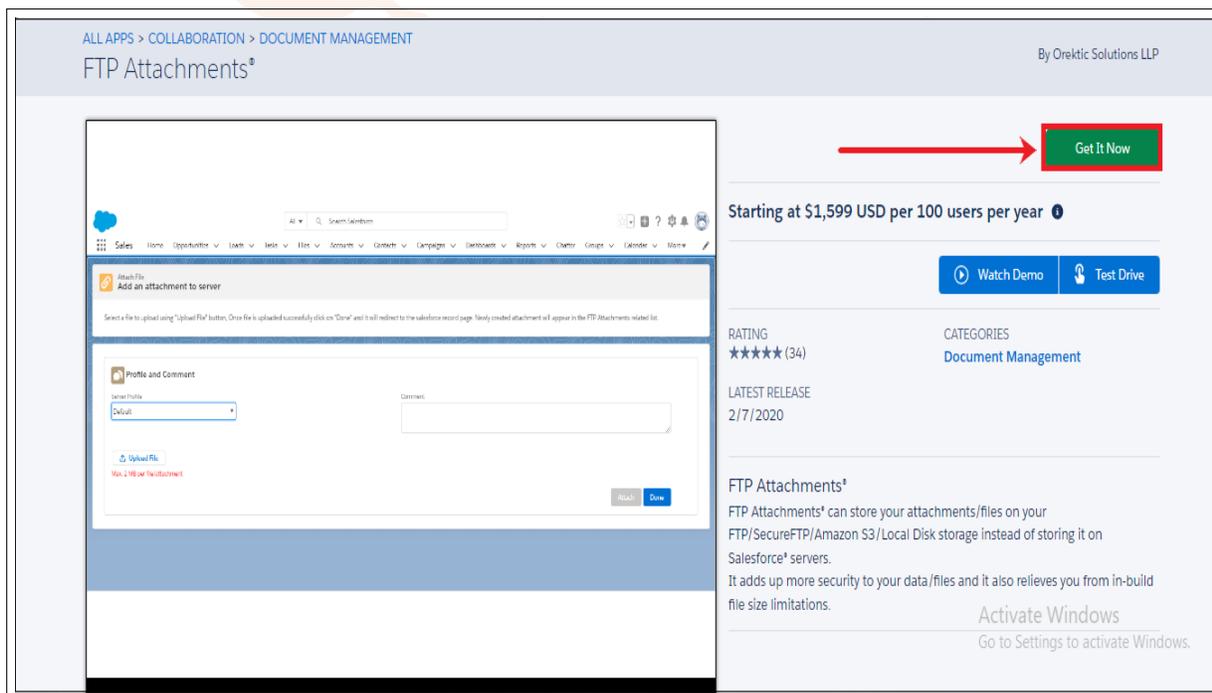


Figure 5.1.1: Installation of package in Salesforce

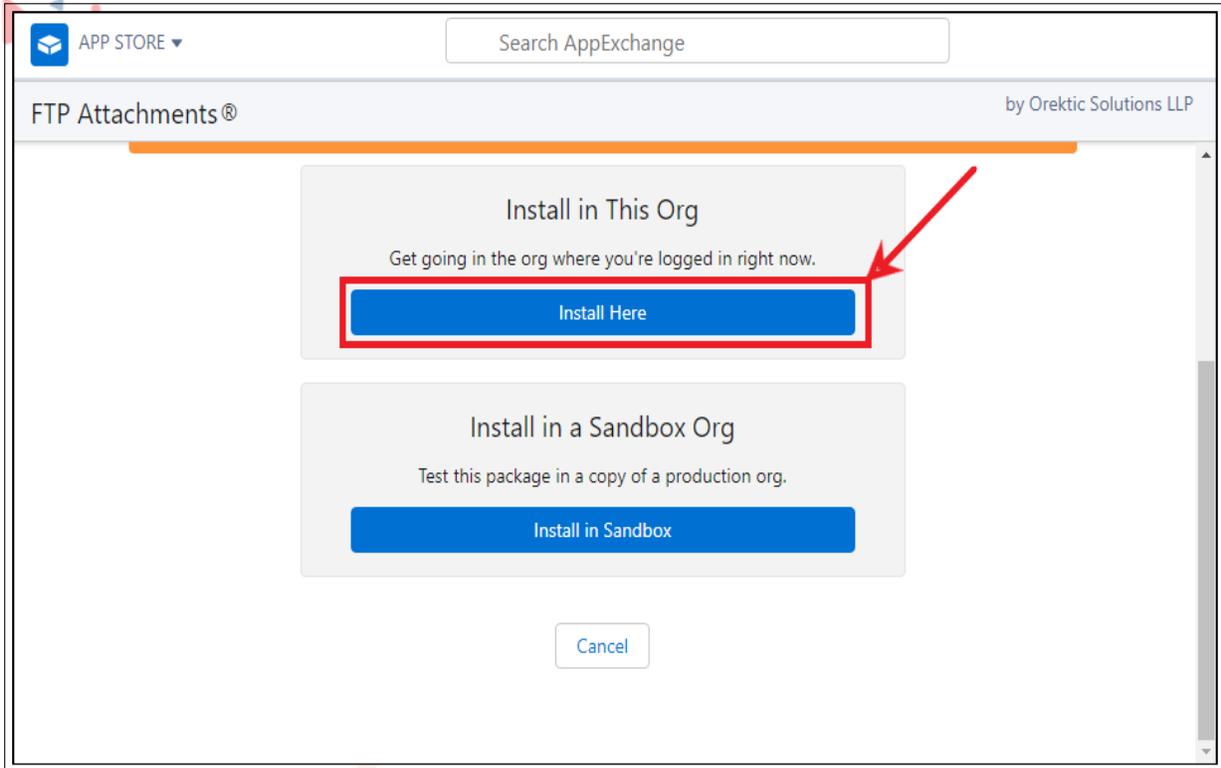


Figure 5.1.2: Installation of package in Salesforce

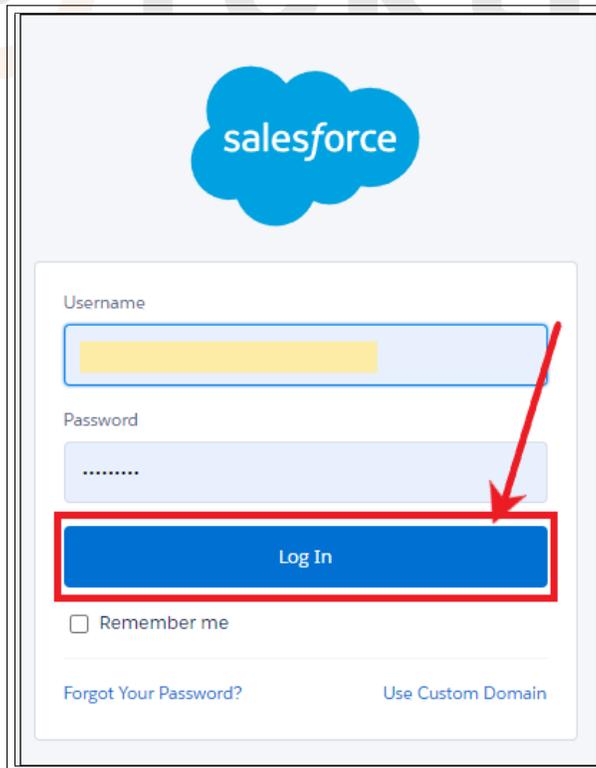


Figure 5.1.3: Installation of package in Salesforce

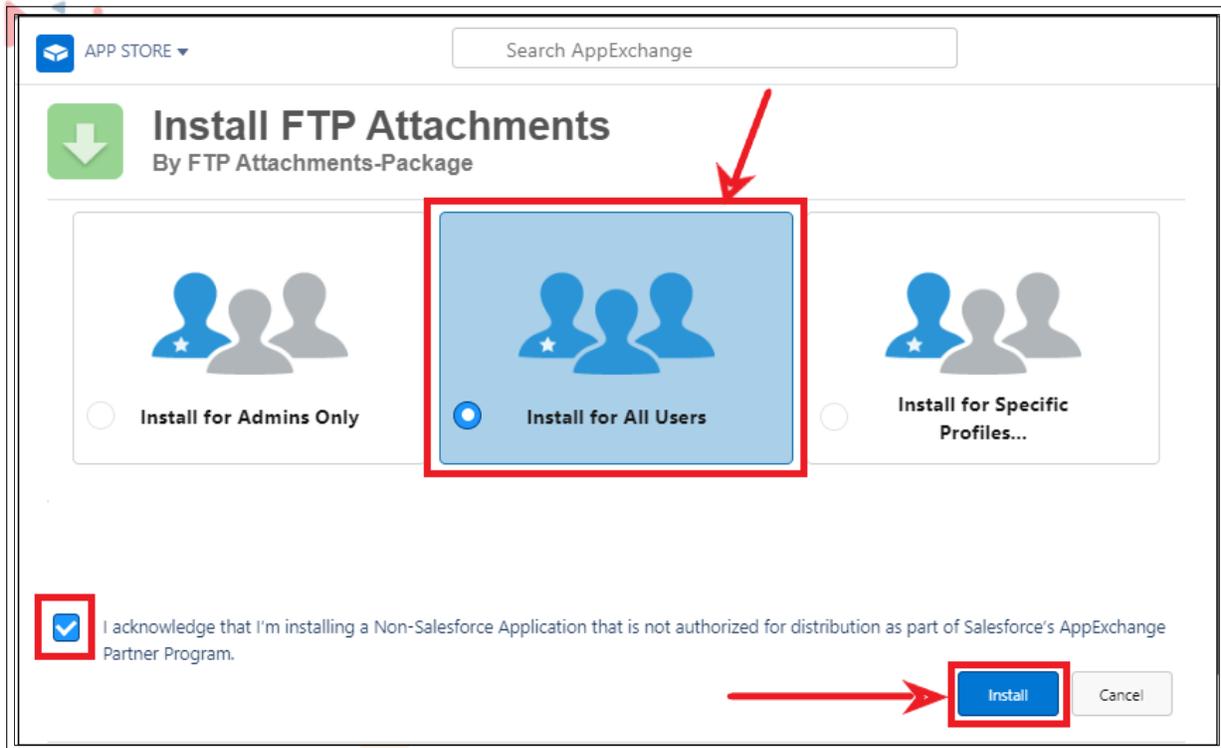


Figure 5.1.4: Installation of package in Salesforce



Figure 5.1.5: Installation of package in Salesforce



### V.1.3 Signup of Salesforce instance with FTP Attachments® Application :

Now, the FTP Attachments® package is successfully installed in your Salesforce instance. Once you are done with the installation of FTP Attachments® package from the AppExchange, follow the below steps:

1. Go to Setup-> Search "Installed Packages" in Quick Find Box-> Click On "Configure" Next to FTP Attachments Package.

Installed Packages							
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses
<a href="#">Uninstall</a> <a href="#">Configure</a> <a href="#">Manage Licenses</a>	<a href="#">FTP Attachments</a>	FTP Attachments- Package	3.2	ENZ	Active	Unlimited	0
Description FTP Attachments™ is a award winning application for Salesforce. It allows your Salesforce users to save their atta							

Figure 5.1.6: Installation and Sign Up

2. Enter your details and click on Sign-up

#### Signup to Orektic

Username <input type="text"/> Email <input type="text"/> <small>Your password will be sent on this email.</small> Name <input type="text"/> Company <input type="text"/> Address <input type="text"/> Address2 <input type="text"/> City <input type="text"/> Zip <input type="text"/> State <input type="text"/> Country <input type="text" value="▼"/> Phone <input type="text"/> Logo(URL) <input type="text"/> <input type="button" value="Sign Up"/>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     In FTP Attachments, your username must be in the form of an email address, but does not have to be a real email. We suggest something like "name@yourcompany.com". Your username needs to be unique.                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     All email communication from Orektic is sent to this email so please make sure you always have up to date email here.                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     Please enter your name.                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     Enter your company name.                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     Enter your billing address here, this address will be used for all the official purposes.                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     Enter your billing address here, this address will be used for all the official purposes.                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     Enter the billing city name.                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     Please enter your billing zip code here, in case you dont have one you can put -                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     Please enter your billing state here.                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     Select your billing country.                 </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">                     Enter the phone number.                 </div> <div style="border: 1px solid black; padding: 5px;">                     Please enter URL to your company logo here, this can be used to display your logo in the application.                 </div>
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Figure 5.1.7: Installation and Sign Up



3. Click on the Next button on the signup successful page. The user gets redirected to the Subscription page.

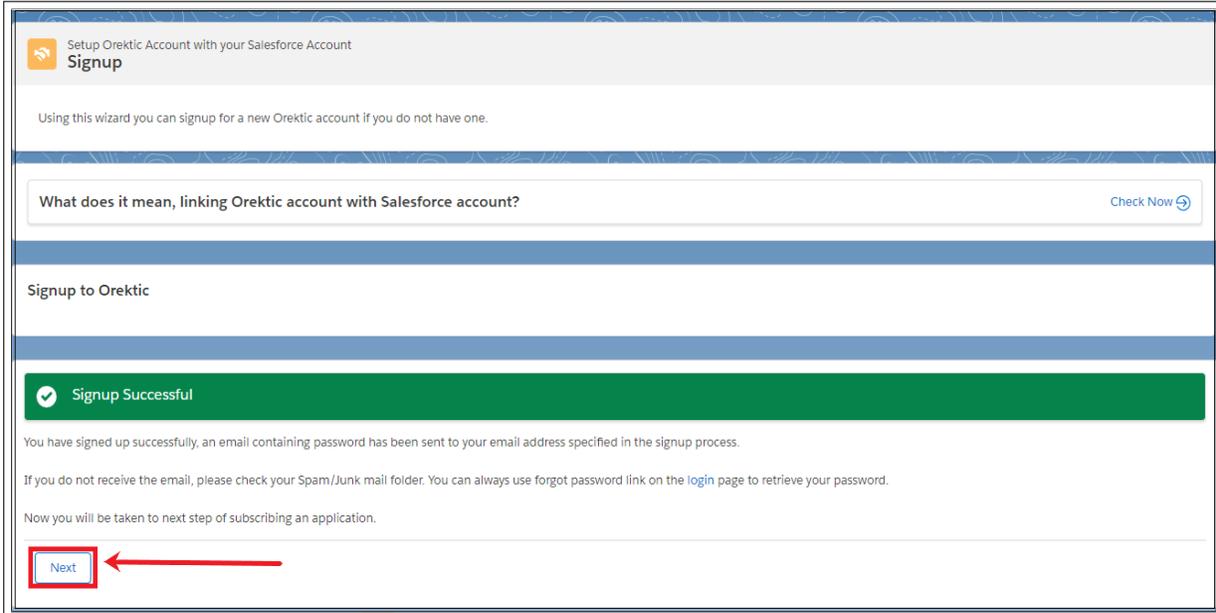


Figure 5.1.8: Installation and Sign Up

4. On the Subscription page, the User can Subscribe to Evaluate enlisted Orektic applications by clicking on Subscribe Evaluate button. Considering an example here we will subscribe to FTP Attachments® Pro

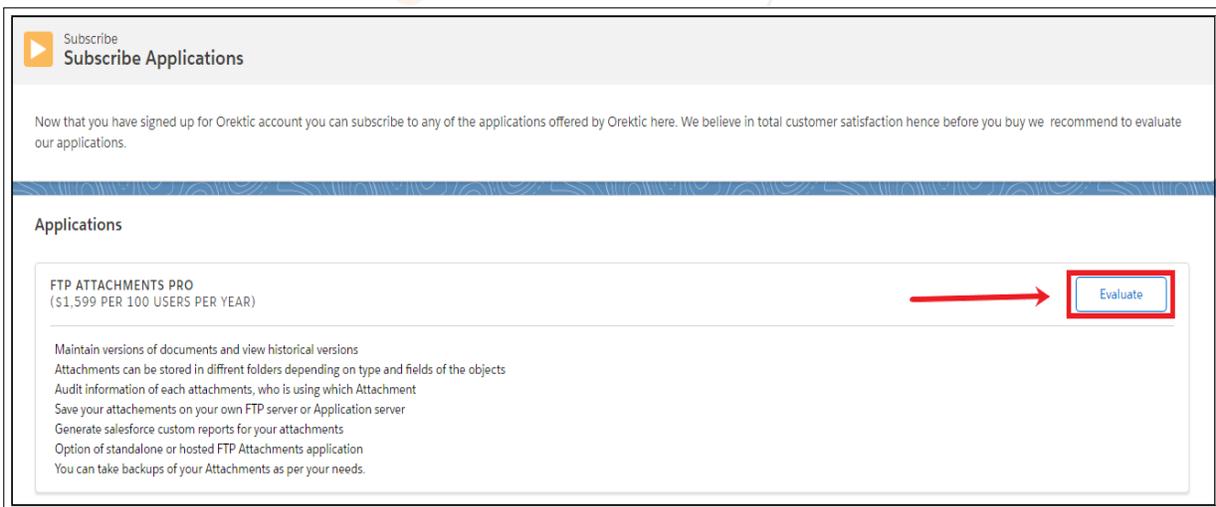


Figure 5.1.9: Installation and Sign Up



5. Enter the details of the Storage server where you want to store your data.

**FTP Setup**  
**Default Storage Server**

This server will be used as default server to store your attachments. You can organize attachments in different folders using Folder parameter of the Attach

**Default Storage Server**

Supported Servers →

Example →

Server Type	FTP
Profile Name	Default
Host/IP Address	ftp.drivehq.com
Login	ftpdemouser
Password	*****
Confirm Password	*****
Port	21
Max. File Size (KB)	2048
Base Folder	
Passive Mode?	<input checked="" type="checkbox"/>

**Enter the details of your Storage Server.**

Edit Test Settings

Figure 5.1.10: Installation and Sign Up

6. Check your Inbox. You must have received an email to set your portal password. Click on “Click here” in the email the server where you want to store your data.

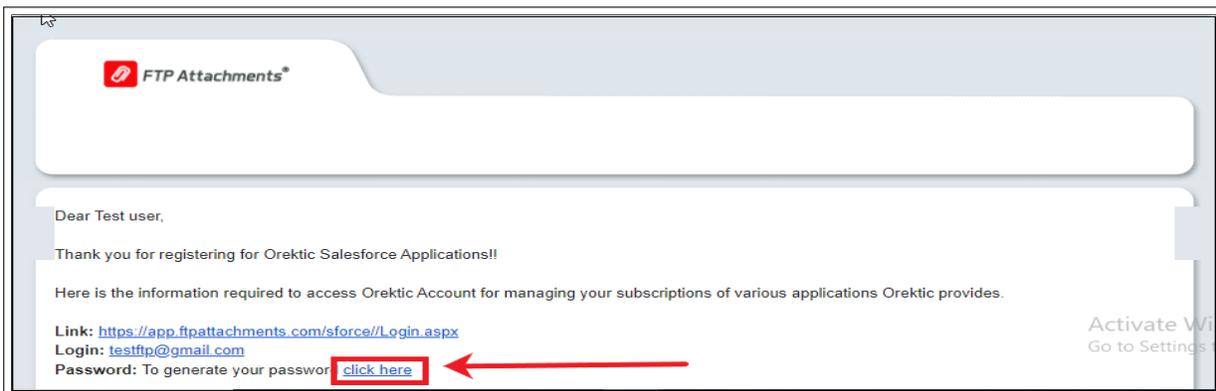


Figure 5.1.11: Installation and Sign Up



7. Enter the New Password and Confirm Password. Then click on Save. Once you receive the Password Changed Successfully message, click on Back to Login button. You will get redirected to Login Page.

Figure 5.1.12: **Installation and Sign Up**

#### For Existing users:

If you are already linked with the FTP Attachments Account, clicking on configure in the 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. Their user will find two options available using which the User can log in to the respective portal:

#### 1. For Production URL (Hosted users):

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

- Select the production and it will redirect you the “[app.ftpattachments.com/sforce](https://app.ftpattachments.com/sforce)”
- Click on FTP Attachments® Settings
- Click on Login to portal
- Click on Login to portal. The login page will be displayed.

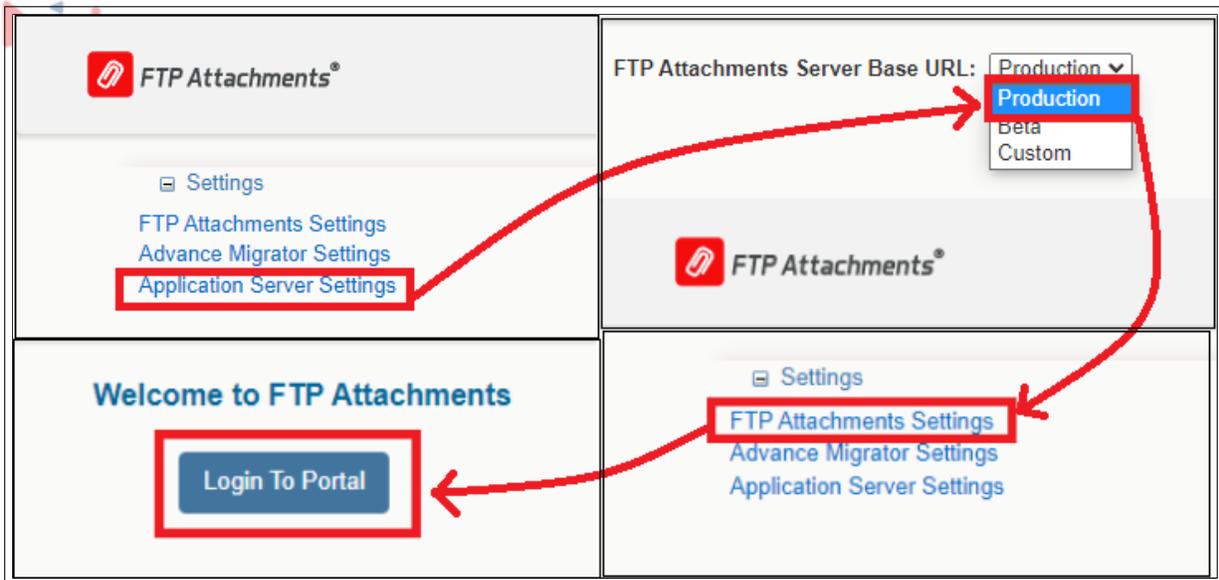


Figure 5.1.13: For Hosted User

**2. For Standalone URL (Standalone users):**

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

- Select the Custom and enter the standalone server base URL, it will redirect you to the page of the URL given by you
- Click on FTP Attachments® Settings.
- Click on Login to portal. The login page will be displayed here.

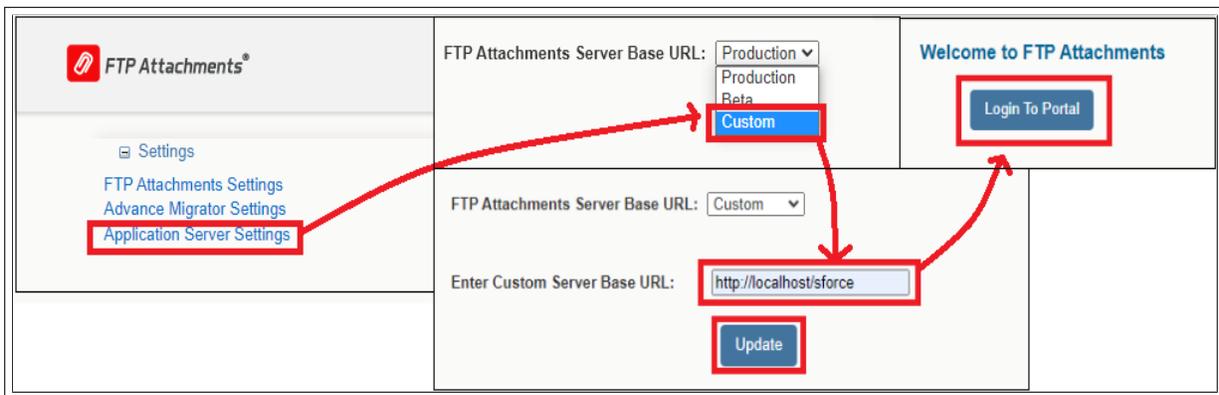


Figure 5.1.14: For Standalone User



#### V.I.4 Standalone Mode:

#### V.I.5 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:

<https://ftpattachments.blob.core.windows.net/builds/ftpattachments-standalone-5.2.15.zip>

## V.II Pre-requisites

### 1. Minimum Hardware:

- Pentium IV processor or equivalent
- Single Xeon recommended for > 200 concurrent users
- Dual Xeon recommended for > 500 concurrent users

### 2. Attachments

- Internet connectivity required

### 3. 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

### 4. Operating System

- Windows 2008 Server or Advanced Server
- Windows 7 and above (64-Bit Edition)
- Windows Server 2008 family products

### 5. 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.

- Extract the FTP Attachments® build from the link provided by us to your local machine.



- Run IIS as administrator.
- Right click on default Web site.
- Select Add Application.
- Write “sforce” in alias.
- Select ASP.Net v 4.5 in application pool
- Browse to the physical path where the FTP Attachments® build is saved in physical path
- Click on ‘Ok’. An application will be added to IIS. (Figure. 9.1 Creating Application) Right-click on force > Manage application >Browse
- If the application is successfully configured on IIS, it will take you to the Login page.

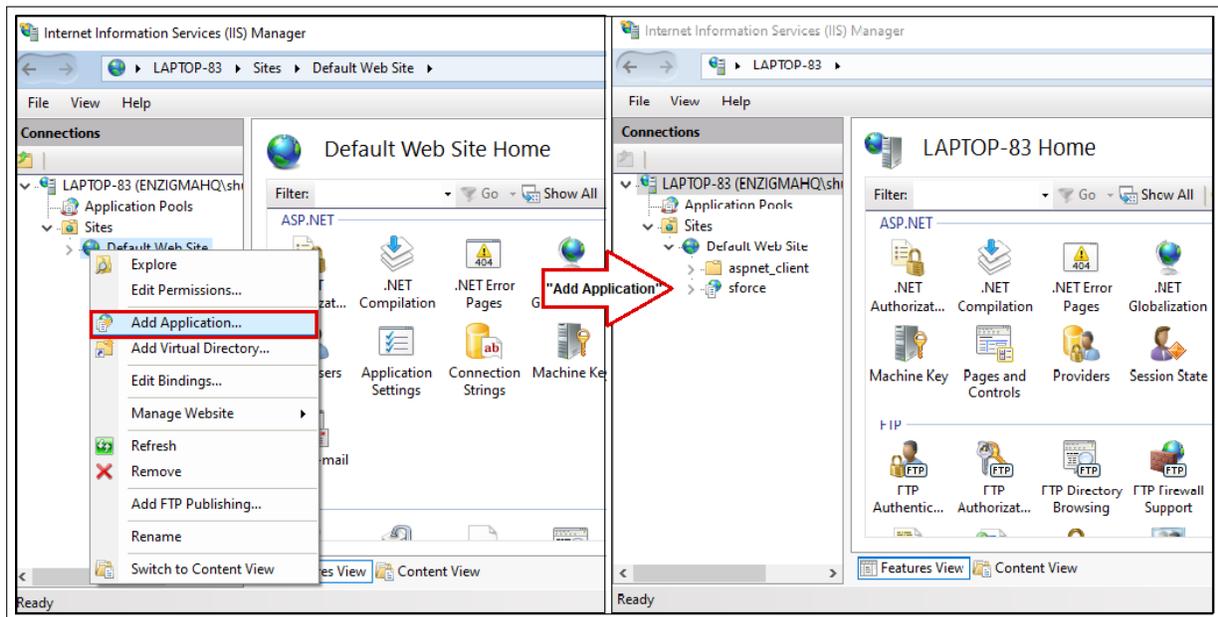


Figure 5.2.15: Creating Application

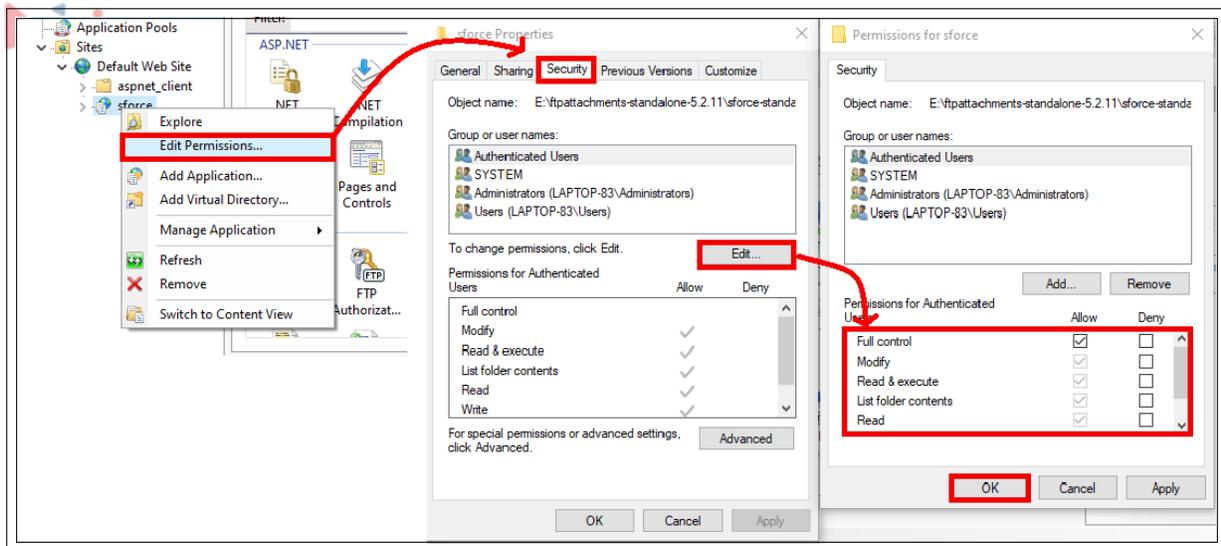


Figure 5.2.16: Creating Application



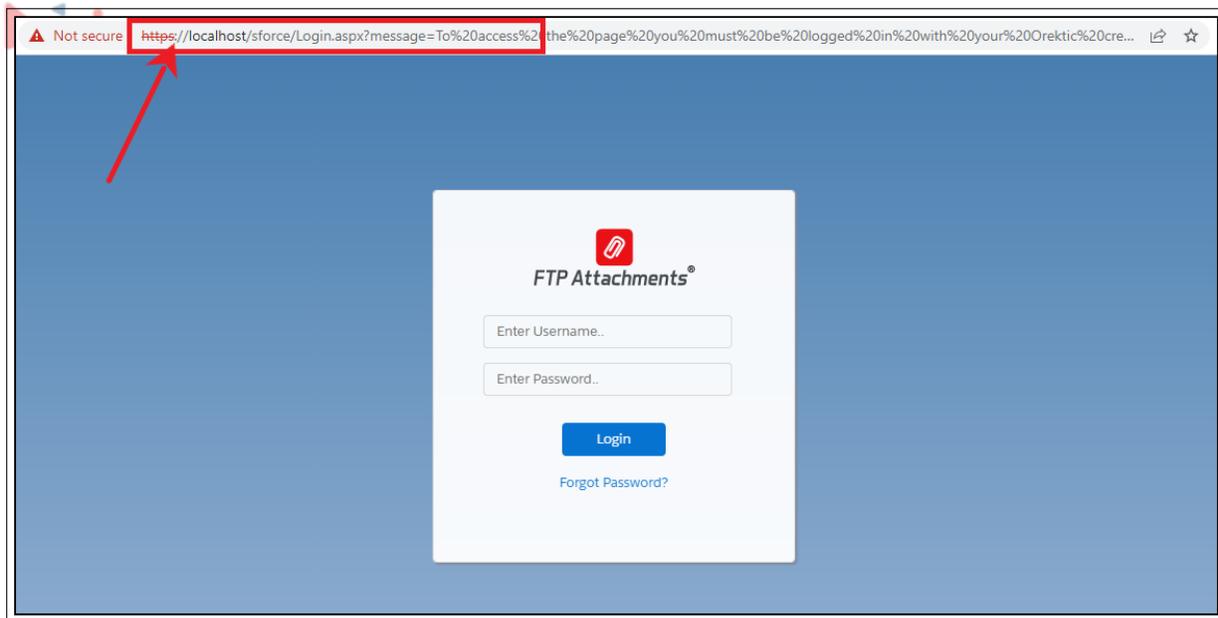


Figure 5.2.17: Login Page





### V.III Step by Step Walkthrough

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.

#### V.III.1 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. Much information has been shown using pictorial graphs and in tabular form.

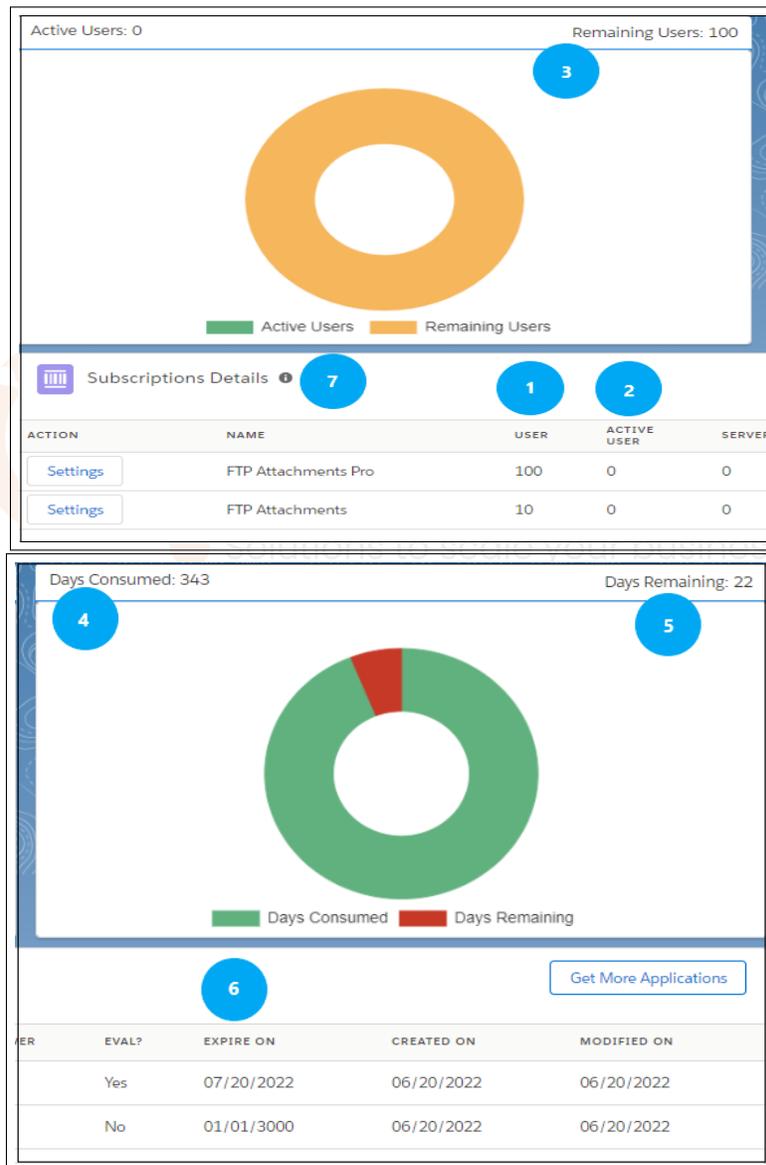


Figure 5.3.18: Dashboards



1. **User:**Number of users for whom the FTP Attachments® license is available for your company.
2. **Active Users :** Number of Active users who are currently using FTP Attachments® application.
3. **Remaining users :** Number of Remaining users among your licensed users.
4. **Days Consumed:**Number of days FTP Applications is being used.
5. **Days Remaining:**Days remaining for your License to get expired.
6. **Expire On:** License expiry date
7. **Salesforce ORG ID:**You can see ORG ID linked with this account
8. **Subscription details:**Details for all the applications you have subscribed under FTP account
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.





### V.III.2 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 FTP account and then go to menu ToolsCustom Link Manager. Generally, for evaluation purpose you can use the Buttonslinks 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 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 Orektic 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.

- **Link Action :** Select action to be performed on standard or custom Salesforce object. For e.g.: Attach
- **Object :** Select the object on which you want to perform action.
- **Base URL :** Enter your server's base URL. e.g. <https://www.yourdomain.com/sforce> in Server field, if you are using Orektic server please enter <https://app.ftpattachments.com/sforce>
- **Name :** The API name for the button or link used when referenced from a merge field.
- **Label :** The label that displays on user pages for the custom button or link



- **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.
- 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:**

- **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.**





### Create Or Update Link

[Detailed Information](#) ↩

Link Action

Object

Base Url

Name

Label

Display Type

Folder

Server Profile

Figure 5.3.19: Custom Link Manager

**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")

- 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)



### V.III.3 Configure Salesforce page layouts to use FTP Attachments®

After installing the FTP Attachments® application in your Salesforce account. Now you need to add the links for FTP Attachments® in the Salesforce objects page layout. For the configuration of the page layout, you can refer to the following link.

[Salesforce Configuration : Page Layout](#)

1. In your Salesforce account, click on the 'Setup' -> 'Object Manager' Select your desired object -> 'Page Layout' -> Select your page layout. 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.

The screenshot illustrates the configuration process in Salesforce Setup. It shows the 'Object Manager' section with 'Case' selected. The 'Case Page Layouts' section is expanded, showing a 'Case Layout'. The 'FTP Attachments' related list is added to the layout. The 'Related List Properties - FTP Attachments' dialog is open, showing the 'Attach File (Case)' button selected in the 'Selected Buttons' list. The 'Standard Buttons' section has 'New' and 'Change Owner' checked, while the 'Custom Buttons' section is empty.



#### V.III.4 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 5.3.20: Attach Page

- 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
- Search for the particular object to which you want to attach the file.
- Click on the respective link for attaching in the custom links section, this will take you to the attached page.
- Select the storage server profile.
- Use the “Upload” button to select the file you want to upload. Enter the comment for the attachment (Optional) Click on “Attach”.
- Click on the “Upload” button again if you wish to upload more files.
- Click on the “Done” button it will redirect you to the record page of the Salesforce instance.



### V.III.5 View Attachment

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

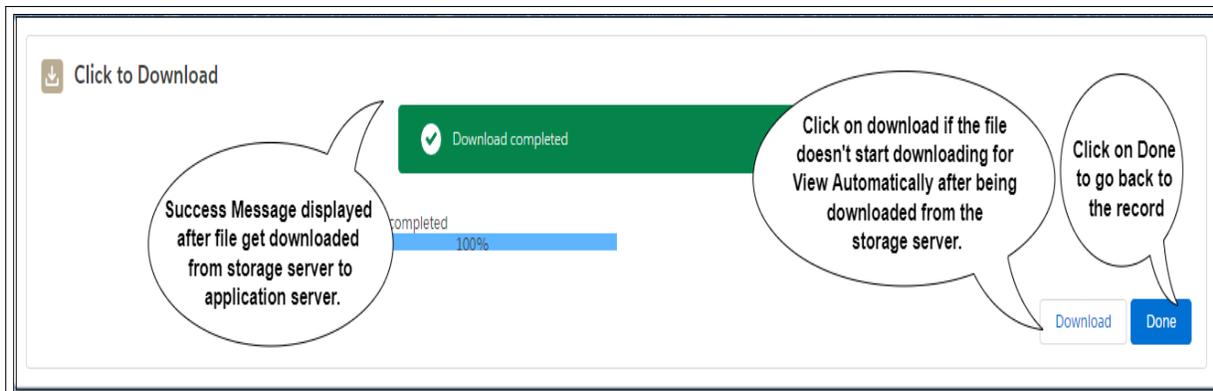


Figure 5.3.21: View Page

- Make sure you have created the custom link button “View” and added it to the FTP Attachments® Layout.
- Search for the object to which you attached the file.
- Click on the attachment in the FTP Attachments® related list section, which you want to view.
- Click on the “View” link button in the FTP Attachments® screen. This will open the Download page for the attachment.
- When your file gets downloaded, click on “Close” to close the download page.

### V.III.6 Update Attachments

FTP Attachments® Pro comes with a 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.

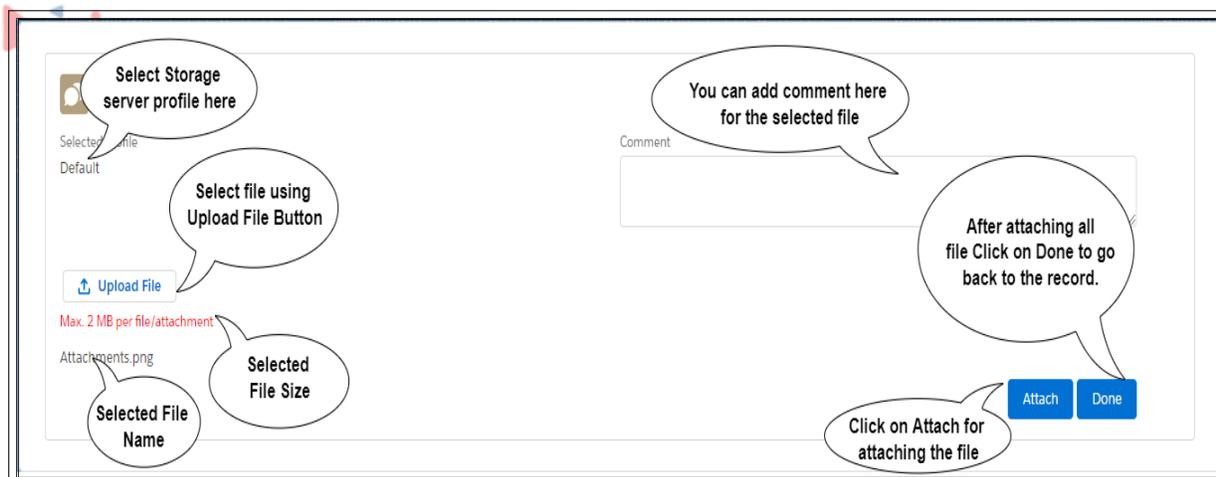


Figure 5.3.22: Update Page

- Make sure you have created the custom link button for updating the attachment and added it to the Layout.
- Search for the particular object to which you attached the file.
- Click on the attachment in the FTP Attachments® related list section.
- Click on the “Update Attachment” link button in the FTP Attachments® screen, this will take you to the update page.
- Use the “Upload” button to select the file, which you have updated, to upload. Enter the comment for the attachment (Optional) Click on “Attach”.
- Click on the “Done” button it will redirect you to the record page of the Salesforce instance

### V.III.7 Delete Attachment

FTP Attachments® comes with a custom link called “Delete” which is used to delete the file in the FTP Attachments® and the actual file from the FTP Server. It is illustrated with the example given below:

**Note :** Before Deleting the Attachments please make sure you the user have the Record Level Access.

- Make sure you have already created a custom link Button “Delete” and added it to the FTP Attachments® Layout.
- Search for the object to which you have attached file.
- Click on the attachment in the FTP Attachments® related list section.
- Click on “Delete” link Button in the FTP Attachments® screen. this will open a window with delete and cancel button.



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

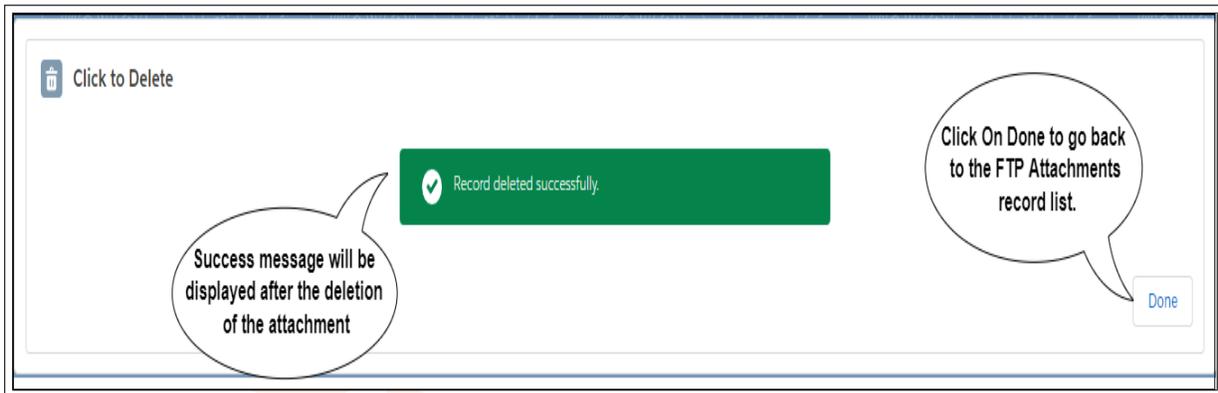


Figure 5.3.23: Delete Page



### V.III.8 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. On your Salesforce Account. Go To Setup -> Object Manager -> **"FTP Attachments"** Object.

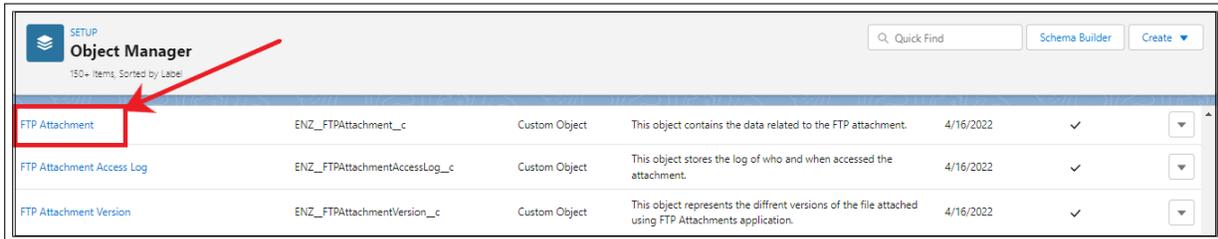


Figure 5.3.24: Custom Object

2. Click **"New"** in the Custom Fields and Relationships section of the page.

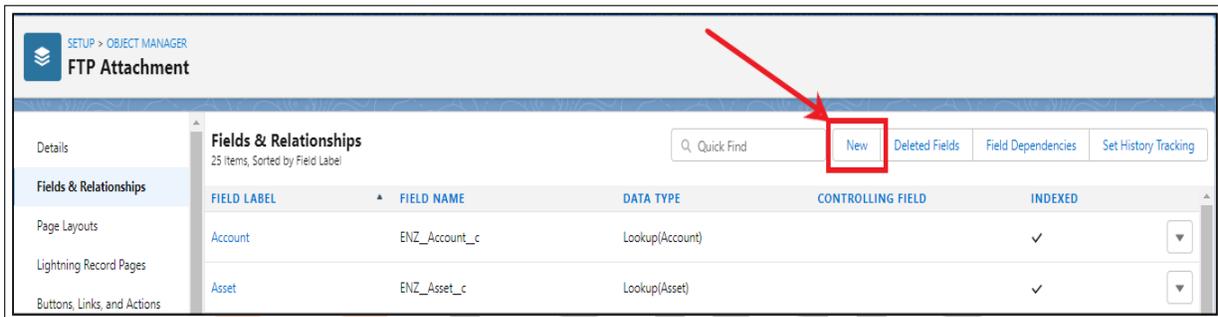


Figure 5.3.25: Custom Object Lookup Relationship Creation

3. Choose the type of field as **"Lookup Relationship"** and click next.

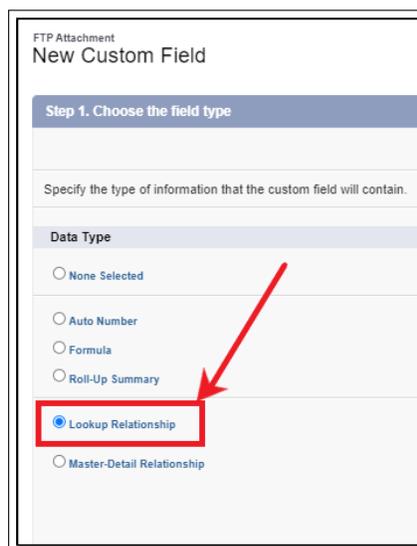


Figure 5.3.26: Select field type



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'.

The screenshot shows the 'New Relationship' page for 'FTP Attachment'. It is at 'Step 2. Choose the related object'. The 'Related To' dropdown menu is set to 'Students'. There are 'Previous', 'Next', and 'Cancel' buttons at the bottom right.

Figure 5.3.27: Select field type

5. Finish the creation of this custom field. Once done use the Custom Link Manage to create custom links for this custom object.

The screenshot shows the 'New Relationship' page for 'FTP Attachment' at 'Step 3. Enter the label and name for the lookup field'. The 'Field Label' and 'Field Name' fields are both set to 'Students'. There are 'Previous', 'Next', and 'Cancel' buttons at the top right.

Figure 5.3.28: Select field type

6. After creating link button add it to the page layout of the custom object.
7. Now, you are ready to use FTP Attachments® with that custom object.



### V.III.9 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@orektic.com](mailto:support@orektic.com).

**Configuring settings for Send Email [Beta]:** Sign up with your FTP 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.

Salesforce Email Setup  
Salesforce user for Send Email feature of FTP Attachments Pro

Please enter a valid Salesforce User credentials who has rights to view all the FTP Attachments in the Salesforce account of yours.

Salesforce Email Setup

Salesforce User Login

Password

Update Cancel

Figure 5.3.29: Salesforce User



### 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.

Figure 5.3.30: SMTP Server Settings

Figure 5.3.31: SMTP Server Settings



7. **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.
8. **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.
9. **In How Many Days Attachment Link Will Expire?:**In how many days attachment link should expire. Default is 30 days.
10. **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 FTP 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.

#### V.III.10 Guidelines for Send Mail

- **To:** Receiver of the mail
- **Cc:** Carbon copy of mail will be sent to all the recipients listed here
- **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.
- **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
- **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.
- **Record to Salesforce:** If you check this checkbox, the email you send is automatically listed in the Activity History related list of the object.

**Preview:** Preview your mail before sending

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

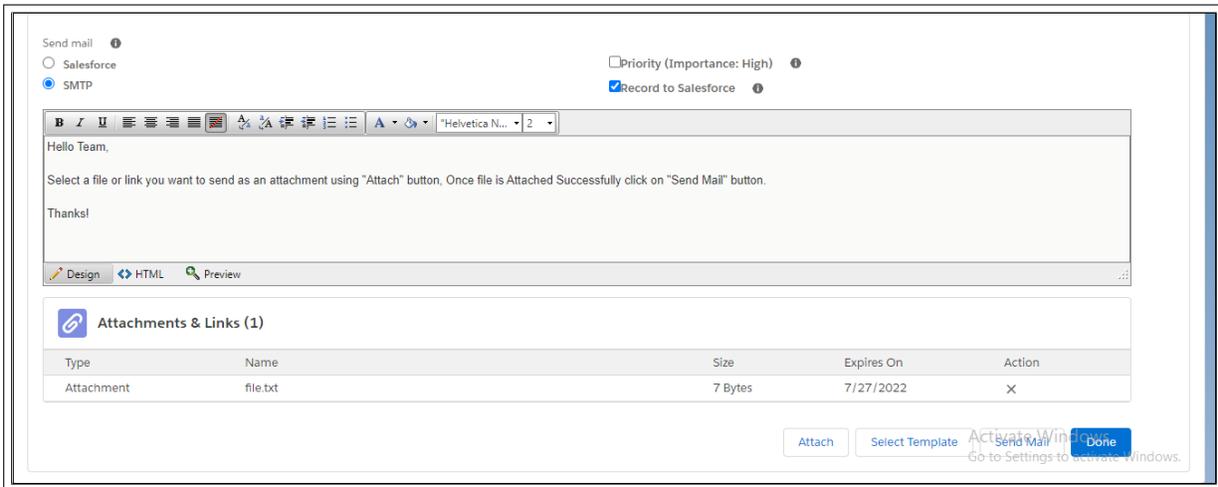
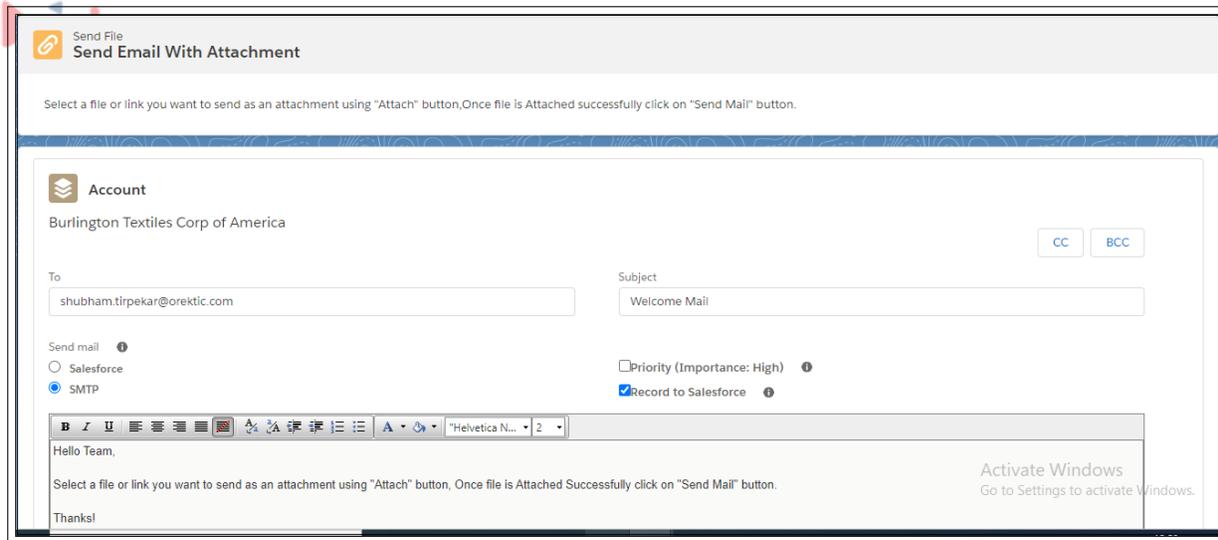


Figure 5.3.32: Send Mail



### V.III.11 Product Add-On's :

1. **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.
2. **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

### V.III.12 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 FTP Attachments Account.

1. In order to configure these settings:
  - Login to your FTP Account
  - Go to Subscription FTP Attachments® MigratorSettings
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.



Salesforce Email Setup  
Salesforce user for Send Email feature of FTP Attachments Pro

Please enter a valid Salesforce User credentials who has rights to view all the FTP Attachments in the Salesforce account of yours.

**Salesforce Email Setup**

Salesforce User Login

Password

Update Cancel

Figure 5.3.33: 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.

- Additional characters allowed in the file name, along with standard characters
- Allow or Deny files with the same name.

File  
File Name Settings

You can set different parameters to allow or disallow certain filenames.

**File Name Settings**

Record was successfully added to the system.

Help

Characters Allowed/Denied  Allow  Deny

Extensions Allowed/Denied   Allow  Deny

Is Duplicate File Name Allowed?

Edit

Figure 5.3.34: 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.



Figure 5.3.35: Migrator Settings

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 (e.g. Cases!Case.CaseNumber)
4. **Storage Folder:** Specify namestructure of the folder, where you want to store your attachments on server.
5. **Note: This is just name of the folder, not absolute path.**
6. **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



**Object** Account **Server Profile** Default

**Add Field To Folder** Id **Comment**

**Storage Folder** **Limit** 1000 **Attachment Filter** **Parent Filter**

**Retrieve** **Start Migrating** **Cancel**

**Migrated Successfully** 100% **File attached successfully** 100%

2 records found

Parent	Name	Folder	Server Profile	Status
0015I000009n9qOAAQ	555.txt		Default	Migrated Successfully
0015I000009n9qOAAQ	New.txt		Default	Migrated Successfully

Figure 5.3.36: Migrator Tool

7. **Object:** Attachments related to some type of object can be migrated together in the same batch, so you can select only one type of object in this field for which attachments will be migrated in one batch. Please Note: Only objects which are related to FTP Attachments® through the lookup field will be visible in the list
8. **Comment:** Comment you specify here will be applied to all the attachments which are migrated to FTP Attachments®
9. **Attachment Filter:** You can specify criteria here to filter the attachments. Only attachments matching this criteria will be retrieved from Salesforce for migration.
10. **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. **Server Profile:** If you are using multiple storage servers, you can choose a profile of the server to which attachments needs to be migrated.
12. **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.
13. **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.Case Number to achieve this
  14. **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 attachment 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 Salesforce by creating an appropriate view under FTP Attachments® tab.



### V.III.13 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.

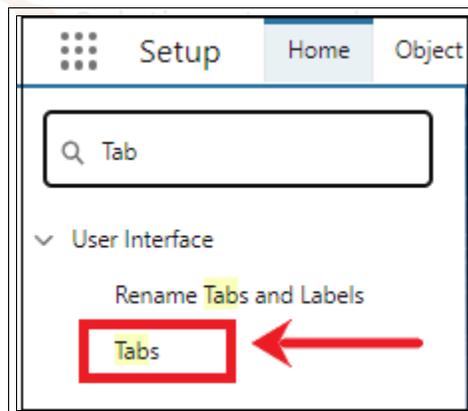
Using this tool, files can be continuously migrated from Notes and Attachments to personal storage server. The record of migrated file can be found in Salesforce's FTP Attachments® object.

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

#### 1. Important:

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

#### 2. 1. Go to Setup, click on create Tab.



#### 3. Create Visual force tab.





**New Visualforce Tab** Help for this Page

**Step 1. Enter the Details** Step 1 of 3

Choose the page for this new tab. Fill in other details.

Select an existing page or [create a new page now](#).

Visualforce Page: **MigratorSettings [ENZ\_\_MigratorSettings]** ←

Tab Label: Migrator

Tab Name: Migrator

Tab Style: Bell

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

Activate Windows  
Go to Settings to activate Windows.

**Next** Cancel

#### 4. Open the migrator settings Tab

- Check the check boxes **Attachment Trigger** and **FTP Migrator Queue Trigger** to start the triggers.
- Select the object for which you want to activate the Advance Migrator tool
- Click on create PushTopic Record.
- Click on “Save”.

**Create PushTopic Record** →

**Trigger**

Attachment Trigger	<input checked="" type="checkbox"/>	←
FTPMigrator Queue Trigger	<input checked="" type="checkbox"/>	←

**Settings**

Object for which attachment should migrate: **Account** Select objects ←

File extension allowed/denied:  Enter comma sep  Allowed  Denied

Allowed file name with patterns:  Enter comma separated patterns

Delete original attachment after migration?

Is Duplicate File Name Allowed?

**Save** ←

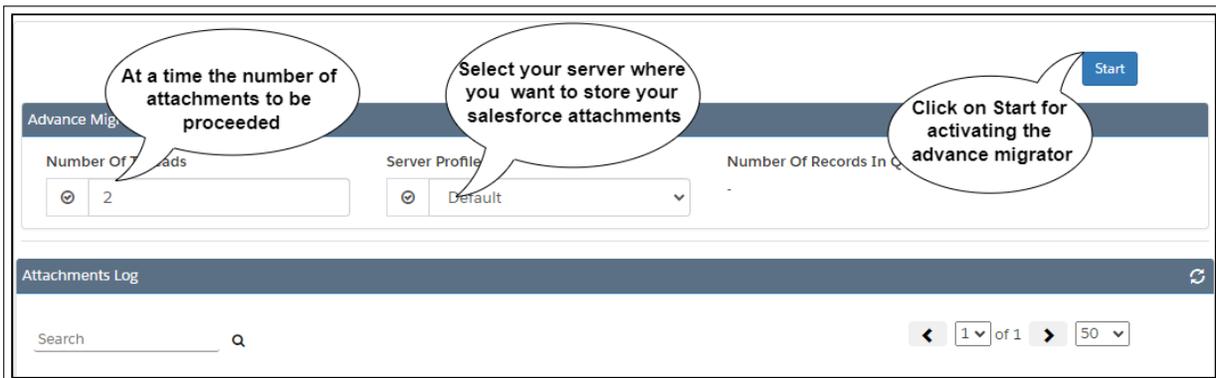


5. Click on Advance Migrator under Tools section of FTP Attachments® portal.
  - Select the Number of Threads-Number of threads will be the count of attachments to be processed at a time
  - Select the server profile where you want your Salesforce attachments to be saved.
  - Click on start button to activate the automated migration process. After clicking on start, the automatic migration of the Salesforce attachments will get started.
  - Click on stop if you do not want to continue the automatic migration of your Salesforce attachments.

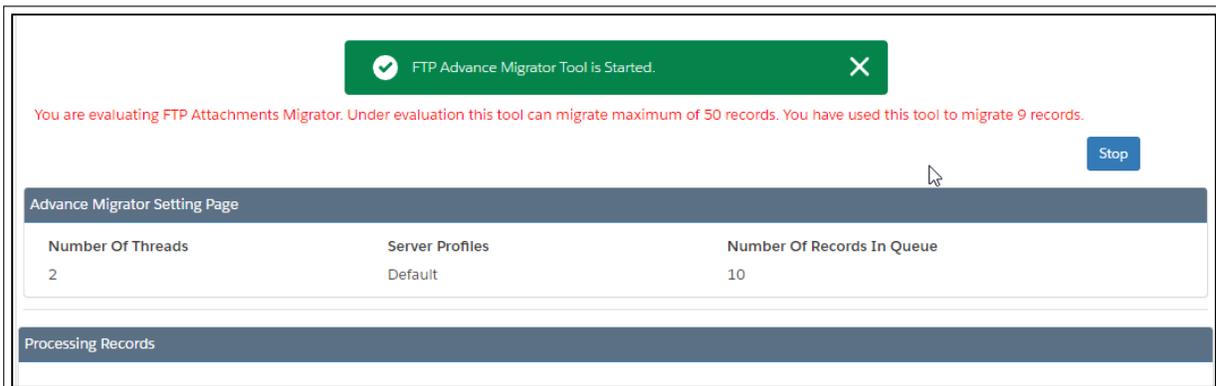
**1. Note: Click on start, only when you have**

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

**2. Before clicking on start:**



**3. After clicking on start:**



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

**Pricing: FTP Attachments Migrator - 1599 USD/Year**



### V.III.14 Override Button

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

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

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

- Go to Object Manager, then Open the FTP Attachment object' Buttons link and Actions.
- Click on edit of Standard button "Delete". Select the visual force page "Delete Attachment ENZ\_Delete Attachment" . Click on Save.

The screenshot shows the 'Override Properties' dialog box. The 'Visualforce page' dropdown menu is open, and the option 'DeleteAttachment [ENZ\_DeleteAttachment]' is selected and highlighted with a red box. A red arrow points to this selection. The 'Save' button at the bottom left is also highlighted with a red box. The dialog includes 'Save' and 'Cancel' buttons at the top and bottom.

Figure 5.3.37: Override of Delete Button



- Click on edit of Standard button “Edit”. Select the visual force page “Update Attachment[ENZ\_Update Attachment]”. Click on Save.

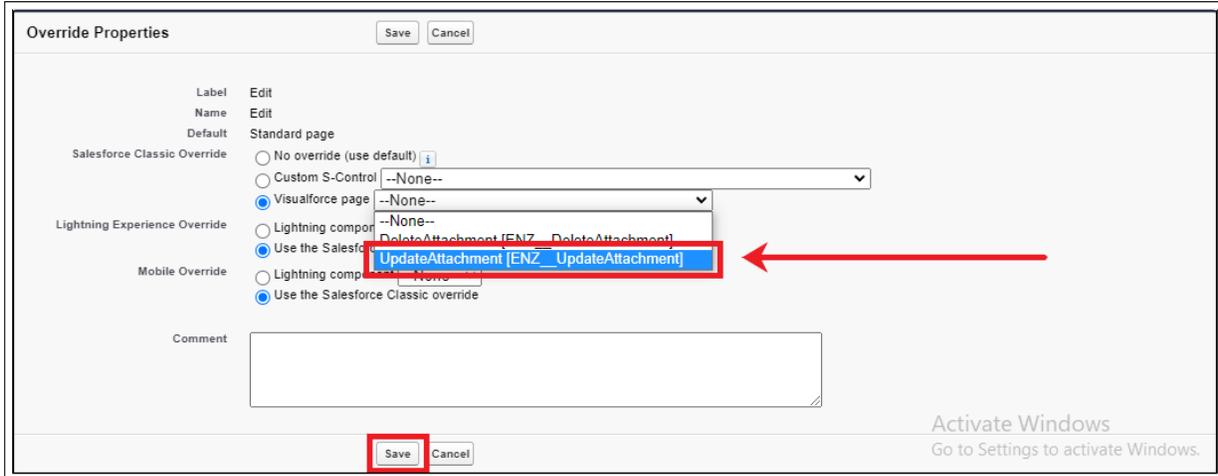
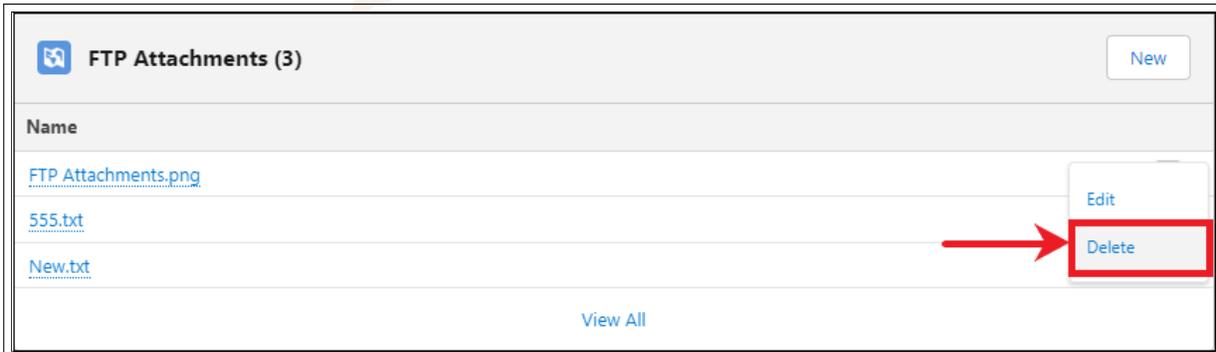
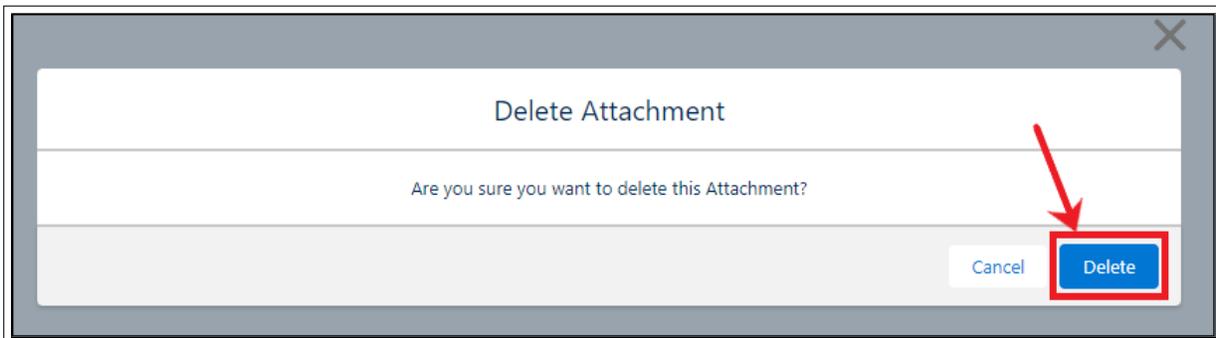


Figure 5.3.38: Override of Edit Button

- Go to the FTP Attachments® related list and click on delete of any attachment.



- Click on Delete button of the page shown below:



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



⊘ Unable to Delete Attachment.You need to update CurrentBaseURL in setting object of Custom Settings. ✕

- Go to Setup then type “Custom Settings” in the quick find box.

### Custom Settings Help for this Page ?

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

Get Usage

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
<a href="#">Manage</a>	ENZ Migrator Settings	Public	List	ENZ	Used to store migrator settings page value	865	1	865
<a href="#">Manage</a>	ENZ Settings	Public	List	ENZ	Settings use to store Hosted and Standalone application URL.	500	1	500
<a href="#">Manage</a>	ENZ Triggers	Public	List	ENZ	This is used to store FTP Attachments trigger on/off setting	110	2	220

- Click on the edit of Settings.

### Custom Setting ENZ Settings Help for this Page ?

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Name
<a href="#">Edit</a>   <a href="#">Del</a>	Settings

- Enter the current base URL, and click on save



### ENZ Settings Edit

Provide values for the fields you created. This data is cached with the p

#### Edit ENZ Settings

Save

#### ENZ Settings Information

Name	Settings
BetaBaseURL	app.ftpattachments.com/sfor
CurrentBaseURL	app.ftpattachments.com/sfor
CustomBaseURL	
ProdBaseURL	https://app.ftpattachments.cc

Enter the <https://app.ftpattachments.com/sforce> or if you are standalone user enter your custom base URL.

- 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.

#### FTP Attachments (3)

New

Name	
<a href="#">FTP Attachments.png</a>	<span>Edit</span>
<a href="#">555.txt</a>	<span>Delete</span>
<a href="#">New.txt</a>	

[View All](#)

### Delete Attachment

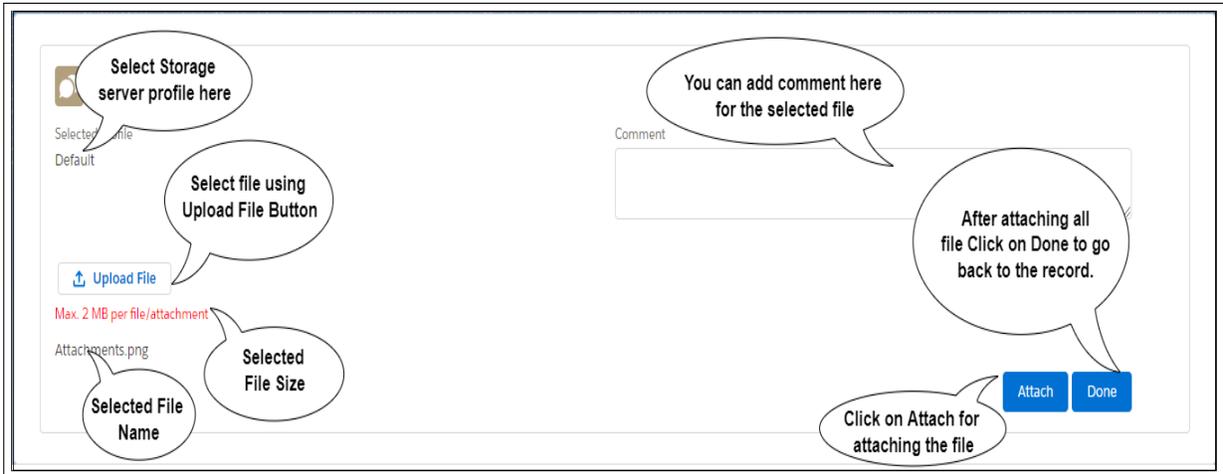
Are you sure you want to delete this Attachment?

Cancel Delete

✔ Record deleted successfully. Please refresh salesforce window. ✕



- Go to the FTP Attachments® related list, if you 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.



- **Select the file to be updated using the upload button, Click on attach for updating the file**



## VI Contact Us

For more information visit [www.orektic.com](http://www.orektic.com)

You can also schedule a product demo to know more about **FTP Attachments** simply by filling out the form [here](#)

If you have any concerns or queries then please contact us on [support@orektic.com](mailto:support@orektic.com)

