



Attachments.expert User Guide

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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

Attachments.expert is an application which is used to store your files (attachments) on your own Storage Server without any built-in maximum size limit.

Attachments.expert behaves very similar to Standard Salesforce attachments and provides flexibility to attach files to most Salesforce Standard or any Custom objects. Different Storage Servers that Attachments.expert currently supports are,

- Azure Blob
- Amazon S3
- Local Disk (HDD or NAS, of your own Windows Server)
- FTP
- SFTP

This document provides a brief description about the prerequisites, installation, settings and working of Attachments.expert





III Product Features

Following are some of the features that attachments.expert provide:

- Attachments.expert works as LWC Component
- Attachment of any size can be uploaded through attachments.expert (No built in size limit by attachments.expert, limits due to storage server, user computer resources like CPU, memory, bandwidth do apply).
- Users can upload attachment using drag and drop
- Upload multiple attachments with ease
- Upload large files with ease, with pause and resume features
- File integrity check on file uploaded (checks if uploaded file is not corrupted)
- File versioning
- Search Attachments
- Organize Attachments in folders in the storage based on the record to which the Attachment is being attached
- Add your own custom fields on Attachment records
- Configure and display custom fields for Attachments
- Multiple Storage Servers can be used to store attachments
- Salesforce users can run Salesforce reports on Attachments
- Chatter can be used on Attachment records
- Attachments can be tagged and searched
- Upload Cleaner option is provided to delete partially uploaded files in order to avoid unnecessary space utilization on Storage Server.



IV Product Versions

Versions	Release Date	Description
Attachments.expert 1.10	11/22/2023	Introduced Attachments.expert as a Lightning Web Component (LWC)
Attachments.expert 1.9	16/08/2023	Minor Bug fixes
Attachments.expert 1.8	07/10/2023	Salesforce API versions have been updated to v57.0
Attachments.expert 1.7	05/26/2023	Salesforce API versions have been updated to v31.0
Attachments.expert 1.2.0	02/27/2020	Minor Bug fixes





V Configuration Guide

V.I Step by Step Walkthrough

This application can be used to perform functions like attach a file, view/download an attachment, update or add a version to an attachment and delete an attachment. These functions are described in the following sections in detail.

V.I.1 Attach a file

To attach a file go to the particular record of the object to which you want to attach the file and click the **'Choose Files'** or drag and drop a file in the **attachments.expert** section for attaching a file.

There are three scenarios through which a file can be attached in attachments.expert.

V.I.1.1 Scenario 1: Using attachments.expert with the Default Storage Profile Setting. When a user uploads a file with the default profile settings and no additional Attachment Setting, the upload file by default gets stored in the Default Storage Profile in the following manner:

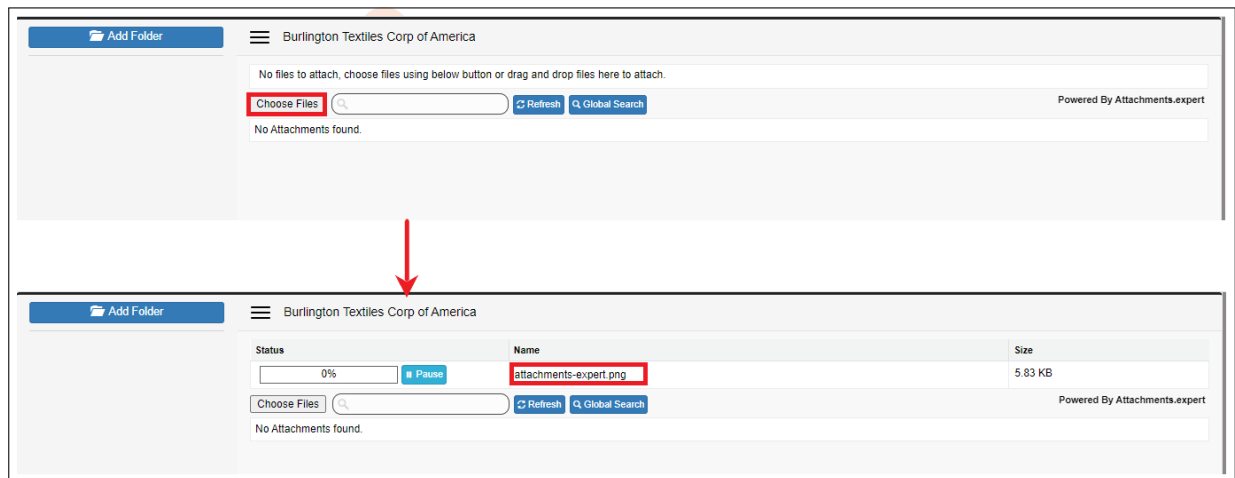


Figure 5.1.1: Attach a File

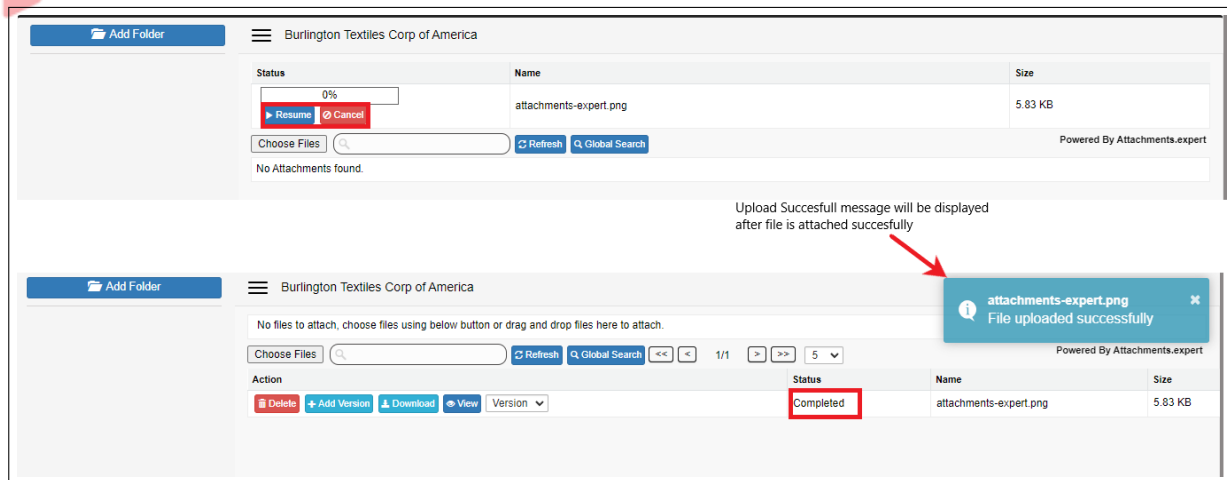


Figure 5.1.2: Attach a File

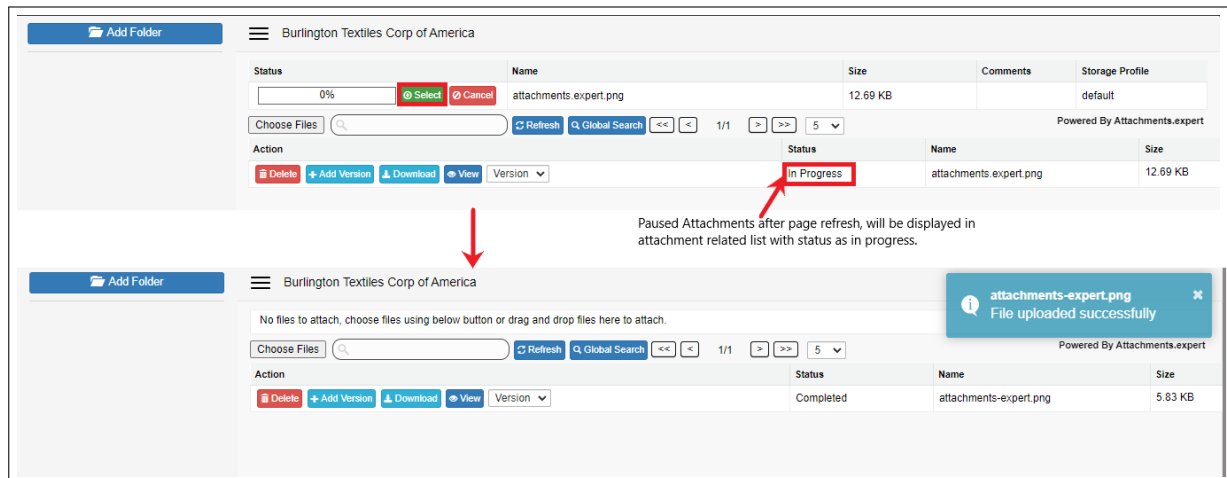


Figure 5.1.3: Attach a File

Note: While uploading a file, if the page is refreshed in between the upload, the uploading of attachment will get paused and a 'Select' and 'Cancel' button will get displayed near the paused attachment. User will have to select the attachment again to restart the upload due to browser security.

V.I.1.2 Scenario 2:

Using attachments.expert with the Customized attachments.expert Setting. When user customize the attachments.expert Settings as per their requirement to upload a file then, while uploading the file, the corresponding options will be provided as selected in the attachments.expert Setting section.

E.g. - Consider the following points for attachments.expert Settings and the result for the same:

- Extensions : To Exclude/Include - exe,dll,js



If the user specifies the above settings in attachments.expert Settings then files with extensions exe, dll, js will not be allowed to upload. An error will be displayed if the user tries to upload files with any of these extensions.

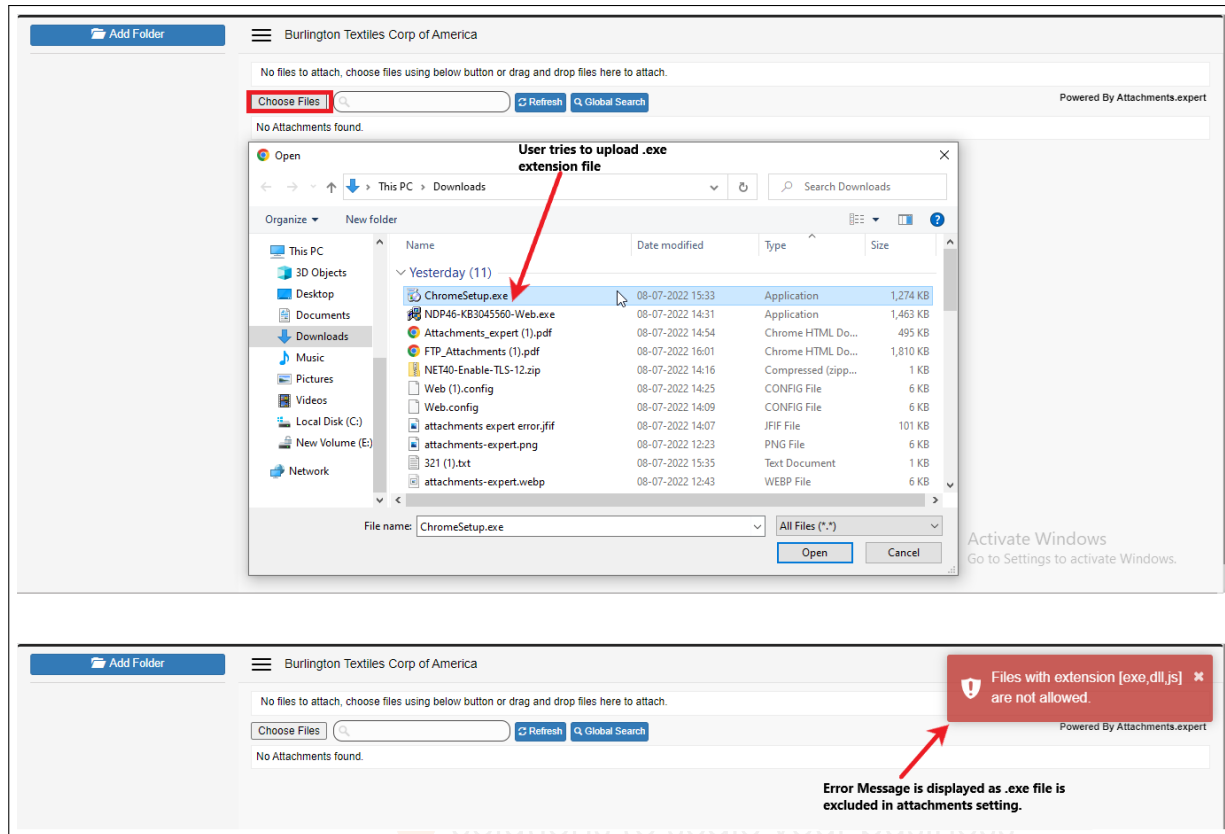


Figure 5.1.4: To Exclude/Include - exe,dll,js

- Fields: Related List - Storage Profile

If the user selects the above setting in attachments.expert Settings, then the attachment setting will show an additional column of 'Storage Profile' in the attachments.expert.

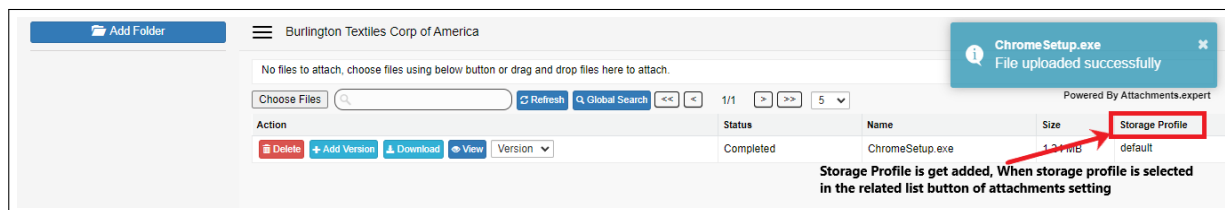


Figure 5.1.5: Related List - Storage Profile

- Fields: On Create - Storage Profile, Comments

If the user selects the above setting in attachments.expert Settings, then the user will get an option to add the Storage Profile and Comment while uploading the file.



Step 1

User will get an option to select storage profile and comment for the file to be uploaded.

Step 2

Storage profile drop down list contain all the profiles list created in attachment settings user can select desired storage profile from this list.

Step 3

Click on "Start" to upload files after changes are made.

Select the desired storage profile and optionally add required text in comment.

File uploaded successfully

Figure 5.1.6: On Create - Storage Profile, Comments

V.I.1.3 Scenario 3: Using drag and drop to upload files in attachments.expert. User can drag and drop a file to the attachments.expert layout from the required location to upload it and then click on the 'Start' button to start the upload of the file as shown in the

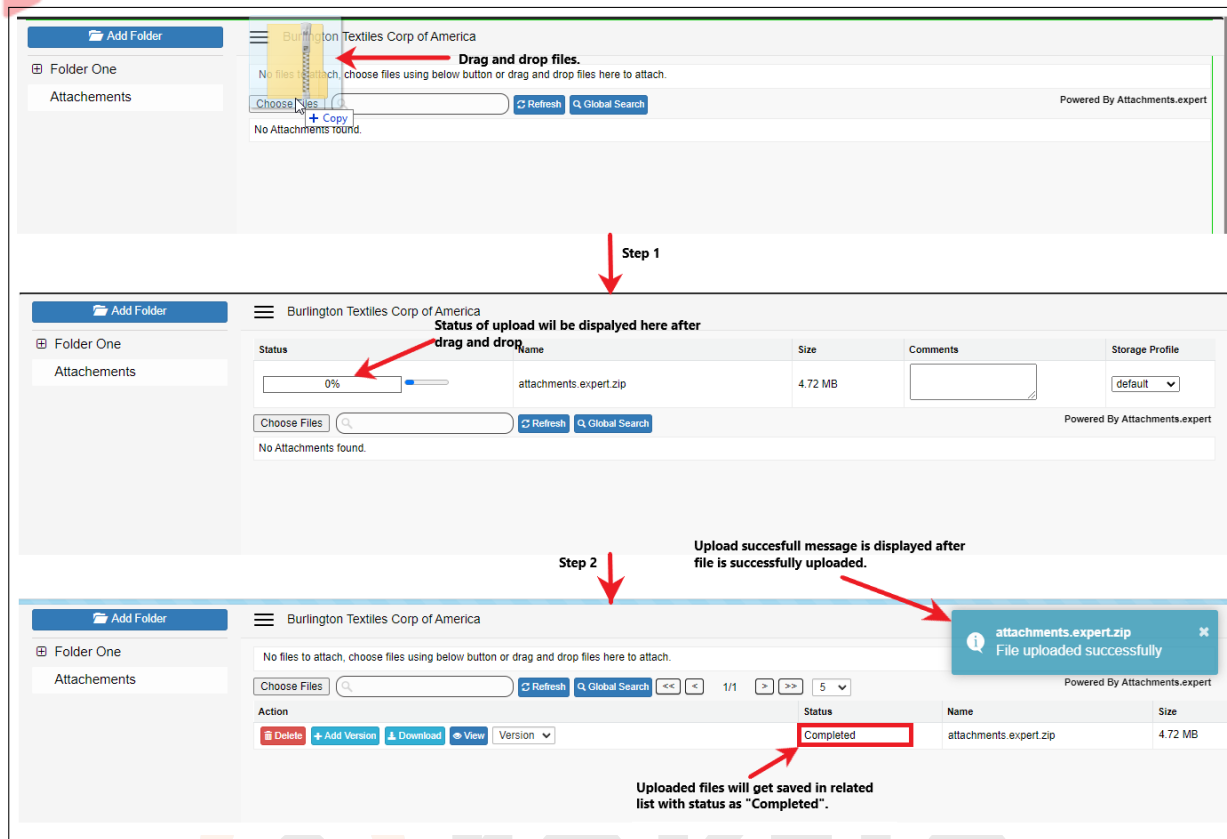


Figure 5.1.7: Drag and Drop Files

Similarly, users can also drag and drop multiple files at a time and start uploading these files, by clicking on the 'Start' button as shown in the

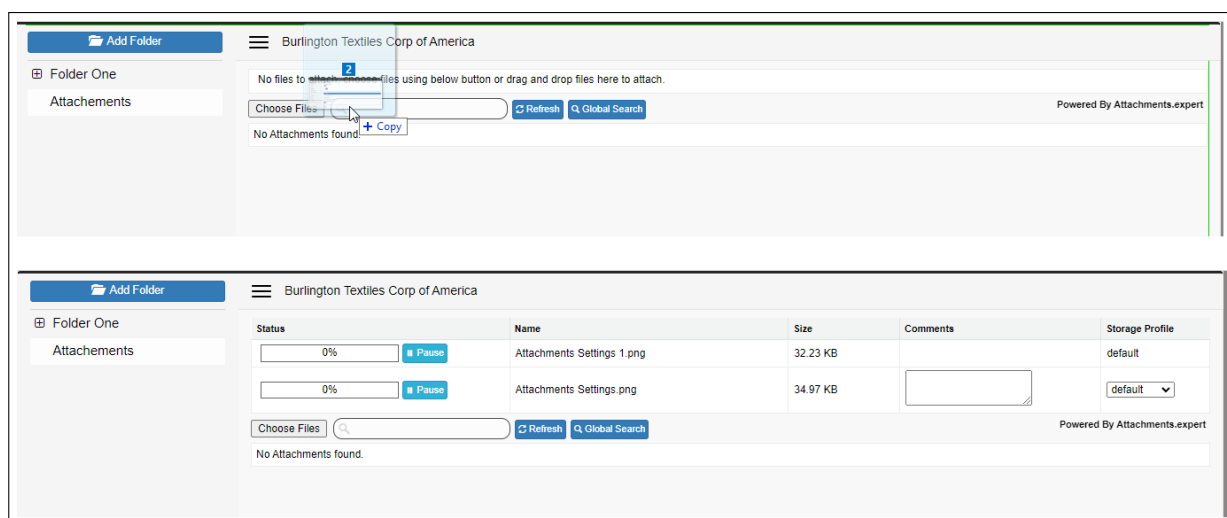


Figure 5.1.8: Drag and Drop Files



V.I.2 Update a file

attachments.expert provide a new feature of versioning a file, through which users can save all versions of the same file on the same storage server. To update a file user only needs to click on 'Add Version' button present in the related list of the attachment or can upload the updated version of the file without changing the file name. The following example shows the use of attachments.expert with different Versions of files.

V.I.2.1 Option 1: Update a file if the file name is same as before Using attachments.expert user can upload different versions of any file and access them as and when required. E.g. - If user uploads a file "attachments.expert.jpg" Using attachments.expert then

- For the first time, user have uploaded a file with name 'attachments.expert.jpg'. The file details are displayed in the related list of the attachment, after the file gets uploaded.
- For the second time when the user wants to update the existing file, they can upload the updated file which is of the same name through 'Choose file' or drag and drop options. In this, case before upload of the second file, the version for the old file will be 1. After the uploading is done successfully, the file gets stored in the same storage server with a new version for the same file. The related list will show 2 versions for the file 'attachments.expert.jpg' now as shown in Fig
- Same is the case for the 3rd version where user can again upload a new version of the file 'attachments.expert.jpg' which will get stored in the same storage server as before with the version number 3 as shown in Fig
- User can access any Version of this file as per their requirement by clicking on the respective version number present in the drop down list of the version button.

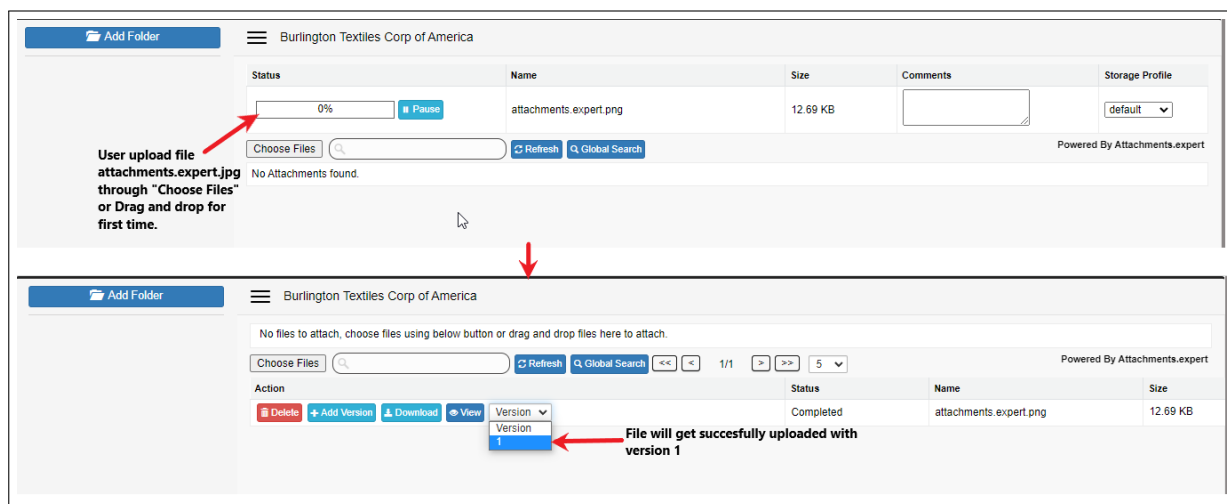


Figure 5.1.9: Update A File



Figure 5.1.10: Update A File

V.I.2.2 Option 2: Update file through 'Add Version' if the file name is different Using attachments.expert, user can add number of versions of a file and save them on the same storage server.

- User have uploaded a file 'attachments.expert.png' in attachments.expert as shown in the Fig-6.2.11. The version number for this file is 1.
- Second time when the user wants to add an updated version of the file 'attachments.expert.png' with file name as 'attachments.expert.txt', user will have to click on Add Version and upload the file 'attachments.expert.txt' as shown in the Fig-5.2.5. After the uploading is done successfully, the version number for the file 'attachments.expert.png' will get incremented to 2.
- In this case, the file name for the updated file will get changed to 'attachments.expert.png'.

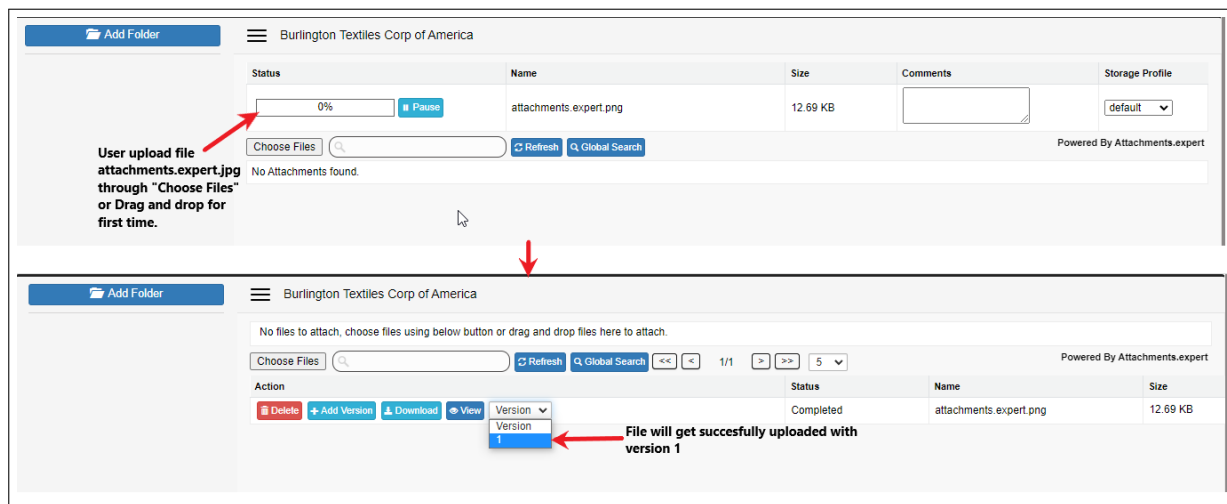


Figure 5.1.11: Update a File

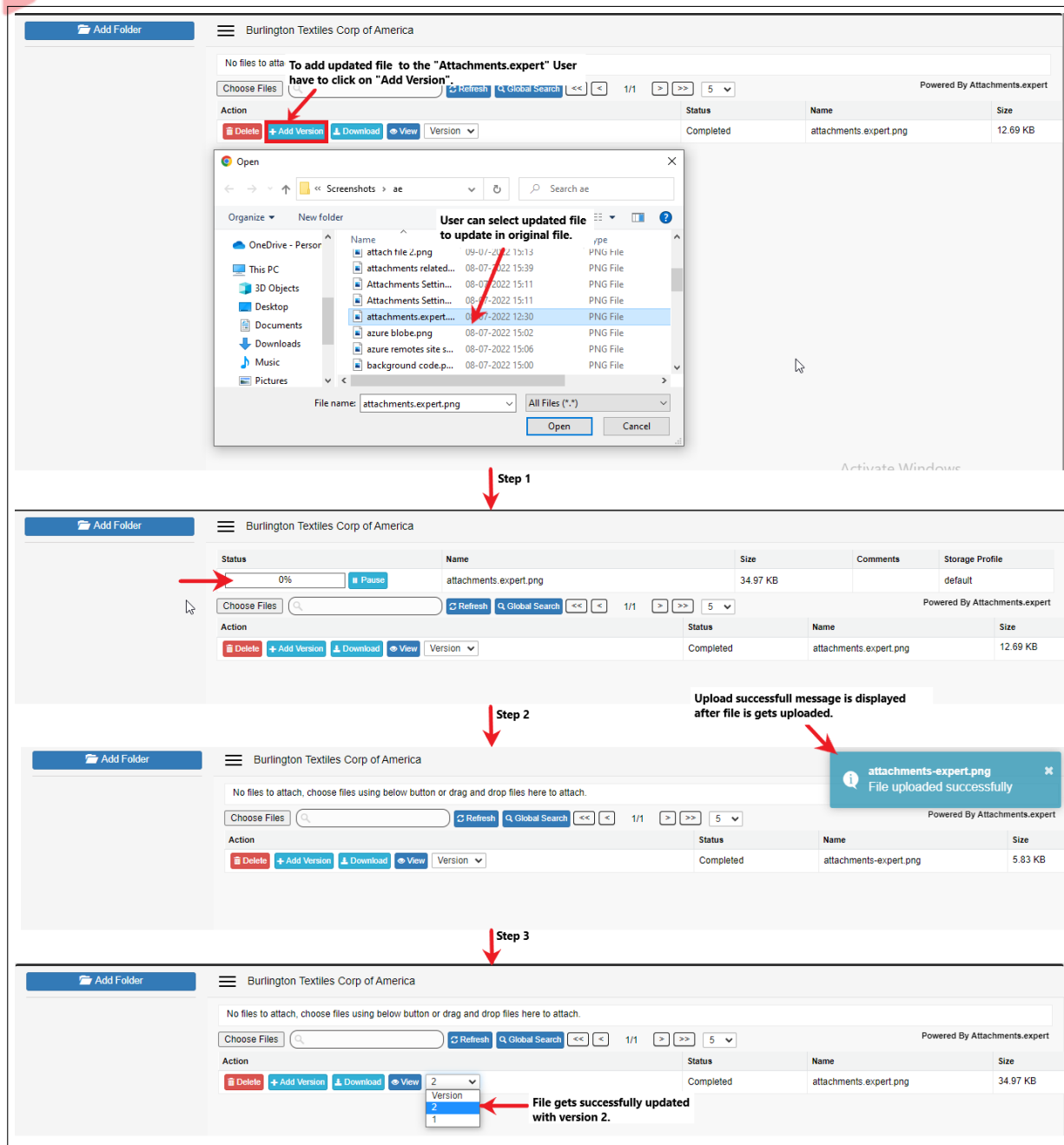


Figure 5.1.12: Update a File

V.I.3 View Attachment

attachments.expert comes with a button called "View" in the related list of attachment which is used to view the file in the attachments.expert. It is illustrated with example given below:

V.I.3.1 Scenario 1: To view a file without versioning

- Search for the object to which you attached the file



- Navigate to the record where the attachment is stored.
- Click on “View” button present in the related list of the respective attachment to view the attachment.
- If it is a image file it will get displayed in a new tab, or all other types of files will get downloaded.

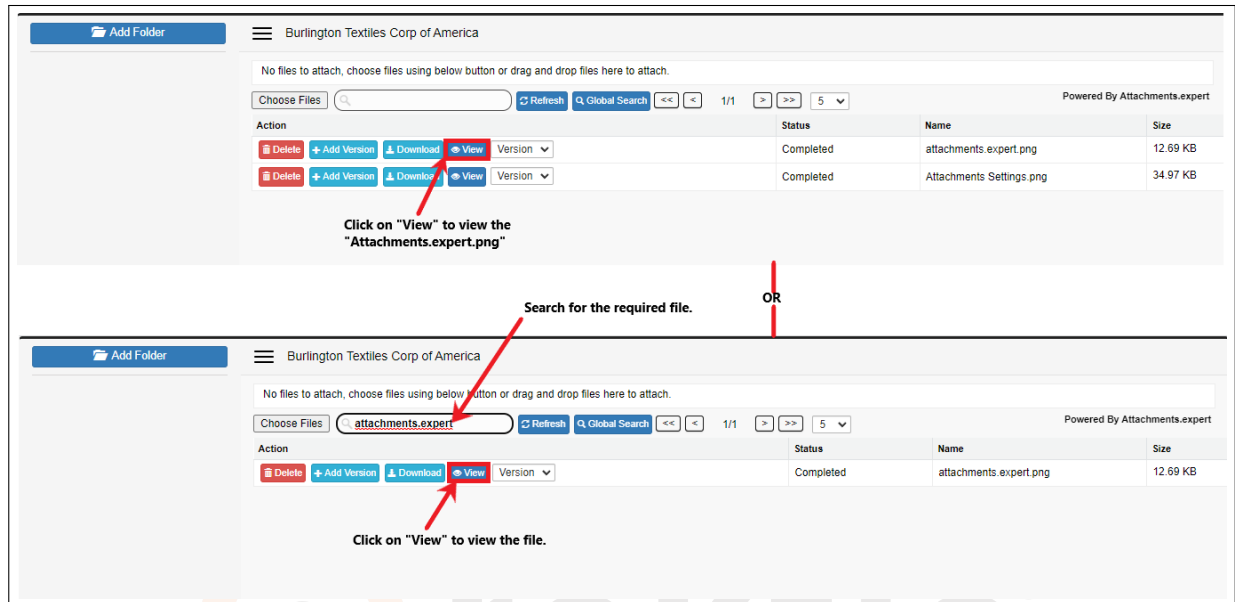


Figure 5.1.13: View File

V.I.3.2 Scenario 2: To view files with different versions

- Search for the object to which you attached the file
- Navigate to the record where the attachment is stored
- Click on the “Version” dropdown button present in the related list of the respective attachment to view the version present for the attachment
- Click on the desired version number from the drop-down to view that version of the file
- If it is an image file the specific version of the file will get displayed in a new tab or all other types of files will get downloaded.

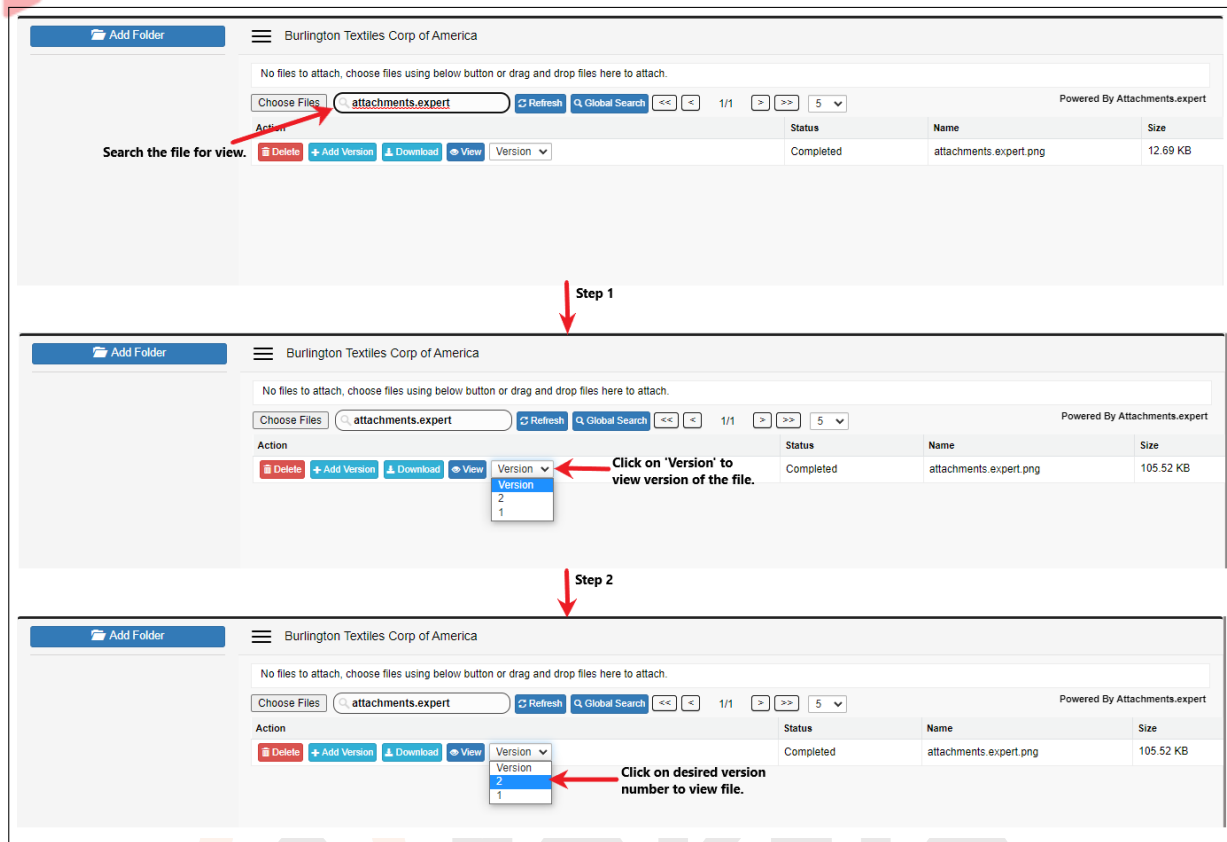


Figure 5.1.14: View File

V.I.4 Delete a file

Attachments.expert comes with a button called “Delete” in the related list of attachment which is used to delete the file in the attachments.expert. It is illustrated with example given below:

- Search for the object to which you attached the file
- Navigate to the record where the attachment is stored
- Click on the “Delete” button present in the related list of the respective attachment to delete the attachment.
- It will ask for confirmation to delete the attachment.
- When clicked on OK, the file will get deleted for the salesforce instance as well as the Storage Server, and a delete confirmation message will pop up on the page

Note: When a user clicks on the ‘Delete’ button in attachments.expert for a particular file, all versions of that file will be deleted from the Storage server as well as from the salesforce instance.

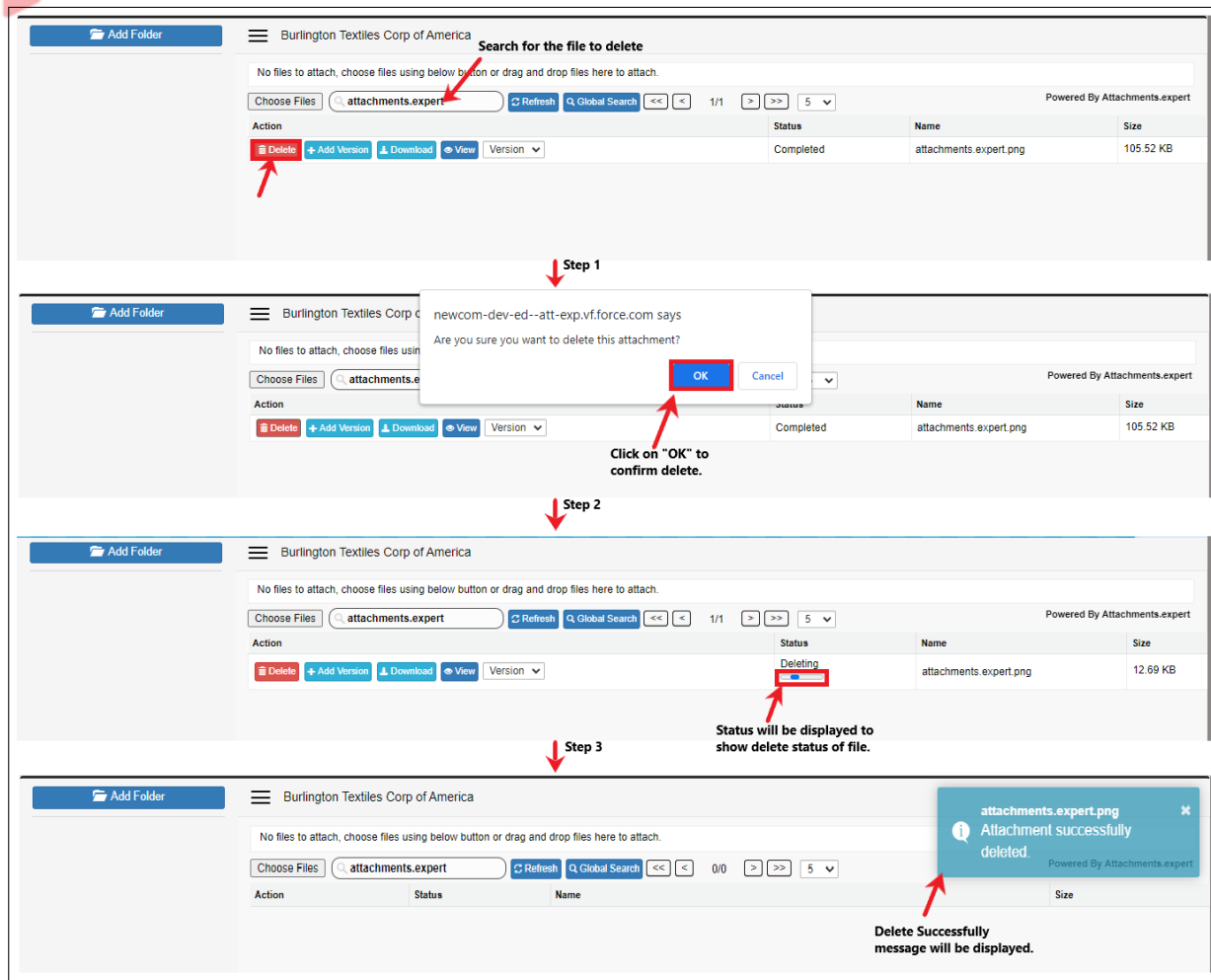


Figure 5.1.15: Delete a File

V.I.5 Attachments.expert LWC Component

We can add the 'Attachments.expert' component to the record page. Follow these steps by editing the Lightning Record Page for the desired object:

- Navigate to the Lightning Record Page of the desired object (e.g., 'Account').
- Scroll down on the left pane to locate the 'Attachments.expert' component in the Custom-Managed section.

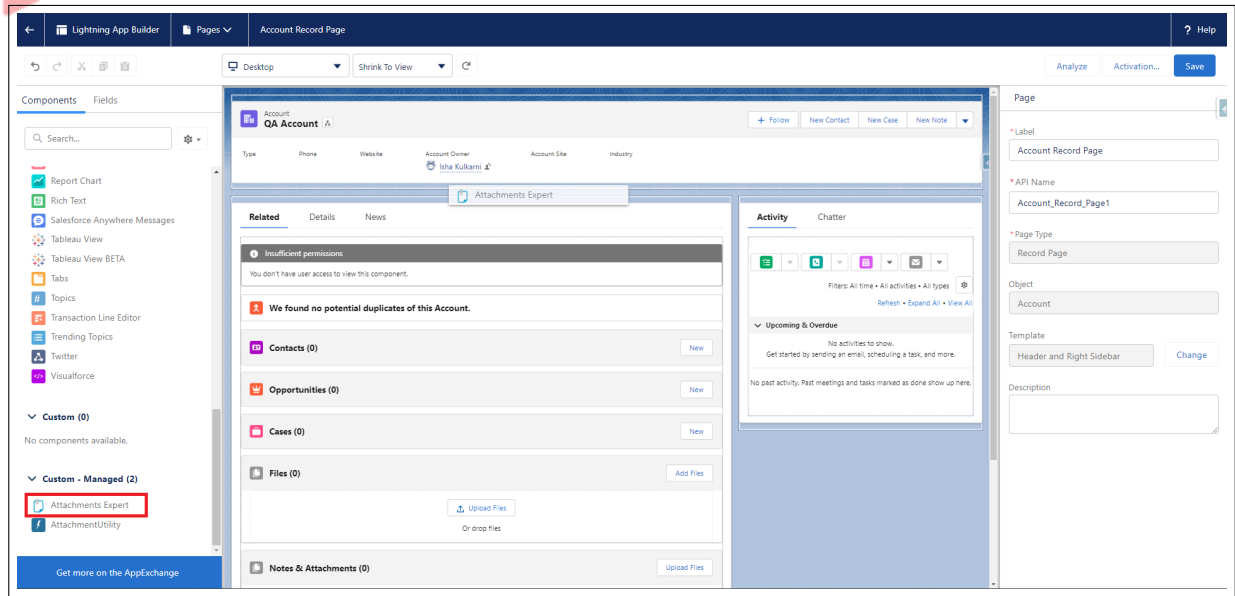


Figure 5.1.16: Attachments.expert LWC Component

- Drag and drop the component to the desired location.

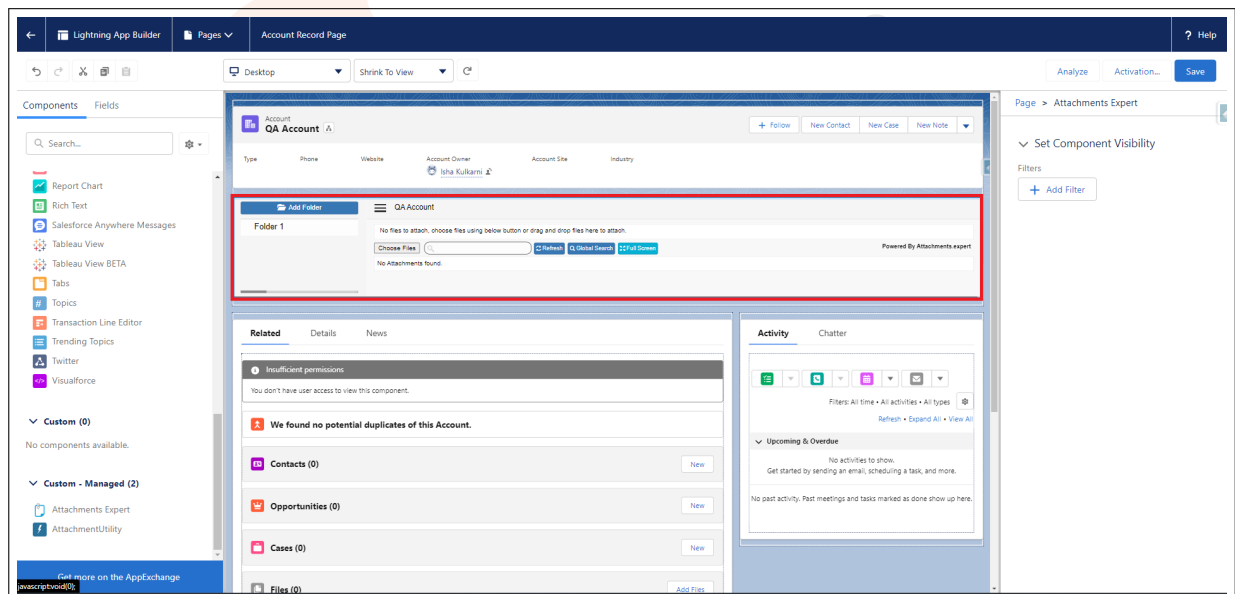


Figure 5.1.17: Attachments.expert LWC Component

- Click on 'Save' and activate the changes.

V.I.6 Folder Creation

User can create folders in any of the record and save attachments in different folders as required.

- Go to attachments.expert layout.



- Click on “Add Folder”.
- Enter the name for the new folder to be created
- Click on “Add Folder” or press the “Enter” key.
- Folder created successfully message will be displayed
- The new folder will get added to the folder tree view at the left corner of the layout.

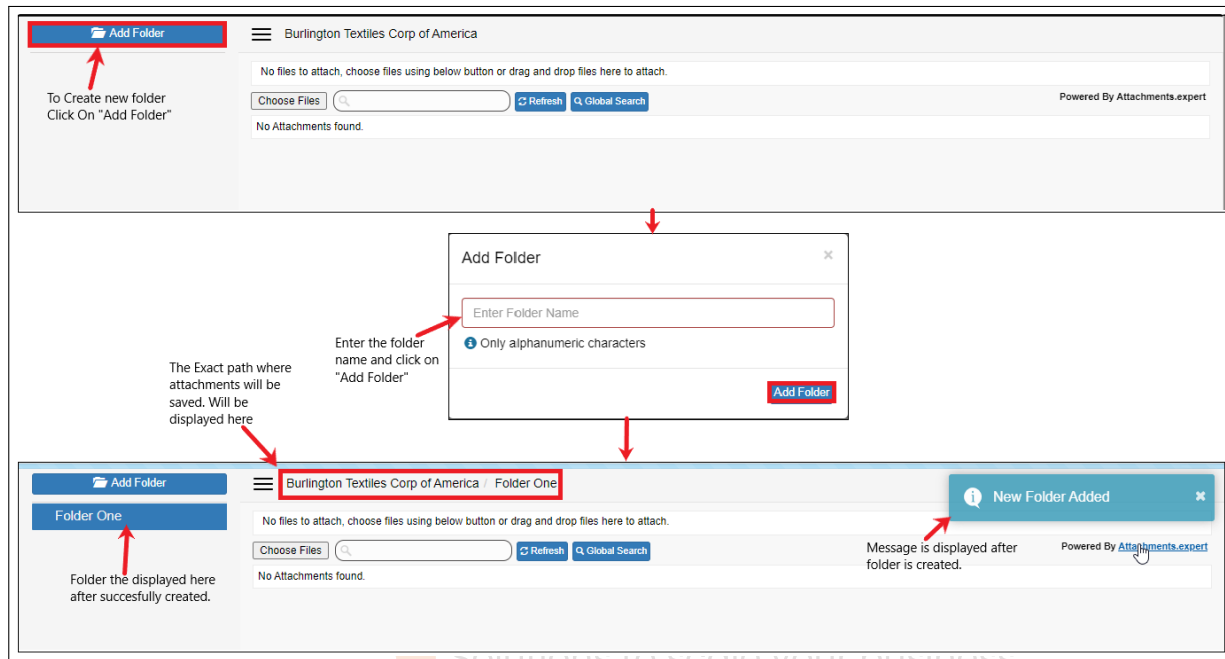


Figure 5.1.18: Folder Creation

Similarly, user can create any number of sub-folders in the newly created folder. The path displayed at the top, shows the actual path where the attachments will be saved. By clicking on any of the folder name or record name, user can move to the required folder to save the attachments.

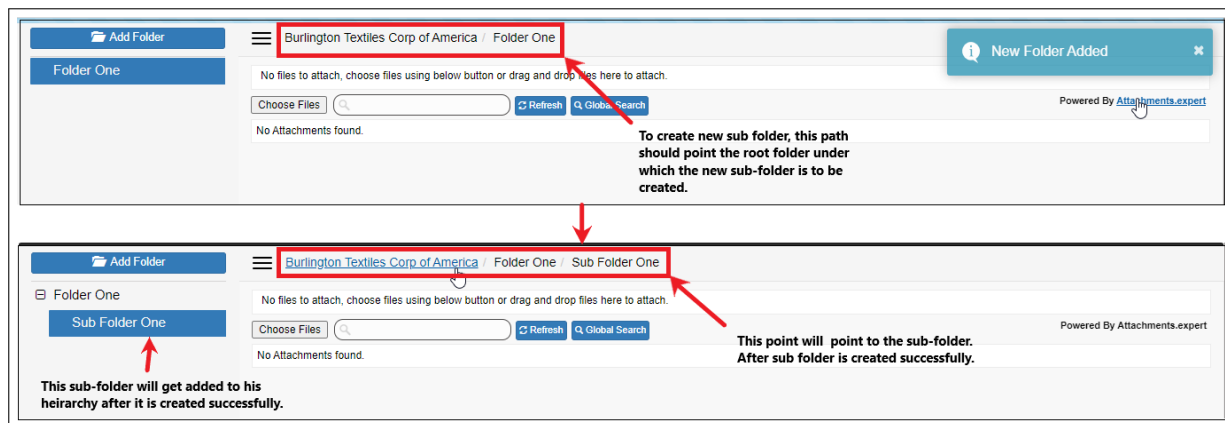


Figure 5.1.19: Folder Creation



Also, to create a second new folder, user needs to click on the record name of the folder path shown at the top and click on “Add Folder” to create a “New Folder” at the record level.

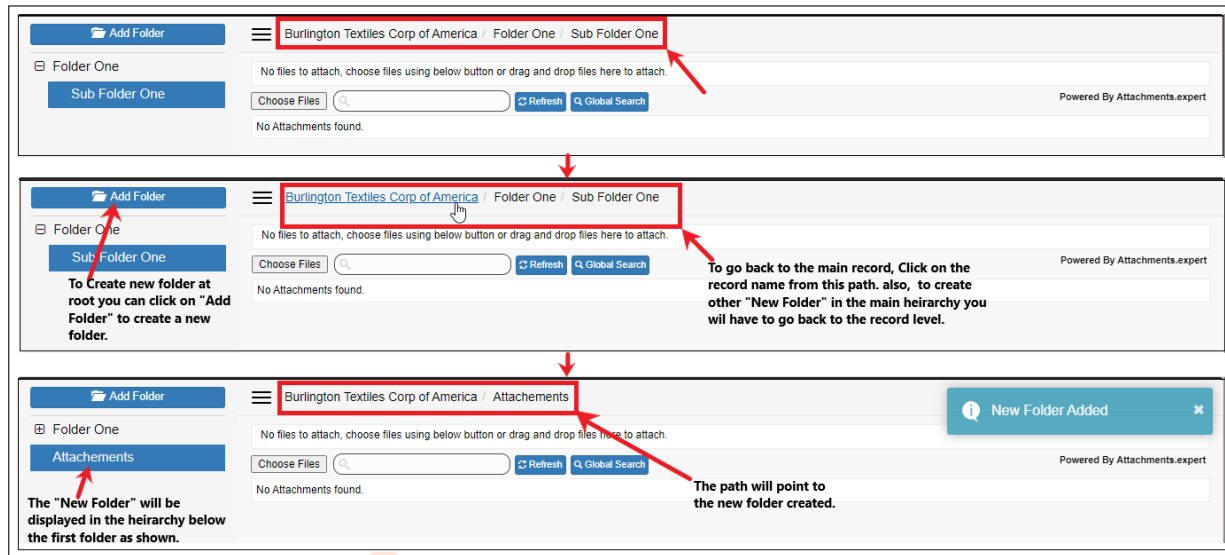


Figure 5.1.20: Folder Creation

In this way, user can create as many folders and sub folders to save the attachments in folder structure order.

Note: Attachments will get saved in the Storage Servers in the same way as they are stored in the Salesforce instance. Similar Folder hierarchy will be created in the Storage Servers. (Except for Azure Blob, where the name of attachment will contain the actual folder names and no folders will be created).

V.I.7 Global Search

Attachments.expert comes with a new feature “Global Search” which will search all attachments uploaded through attachments.expert on any record or object.

Global Search button is provided in the page layout of attachments.expert. Global Search searches for attachments with the help of a keyword that is to be entered in the Search bar of the Global Search window. The keyword can be any of the following:

- Name of attachment
- Storage profile of attachment
- Record name in which the attachment is uploaded
- Folder name in which the attachment is uploaded

Related list table of attachment details provided in the Global Search can be customized through the “Fields: Related List” field provided in attachments.expert Settings page. For details on the related list settings please review the “attachments.expert Administrator Guide”.



Add Folder

Folder One

Sub Folder One

Attachments

Burlington Textiles Corp of America / Folder One / Sub Folder One

No files to attach, choose files using below button or drag and drop files here to attach.

Choose Files

Refresh

Global Search

Powered By Attachments.expert

Attachments.expert Global Search

Total Searched Records: 0

Search

<<

<

1/1

>

>>

5

Action	Parent Record	Name	Size	Status
No record found.				

Attachments.expert Global Search

Total Searched Records: 1

attachments.expert

<<

<

1/1

>

>>

40

Action	Parent Record	Name	Size	Status
<div><div>Delete</div><div>View</div><div>Version</div></div>	Burlington Textiles Corp of America	attachments.expert.png	12.69 KB	Completed

Figure 5.1.21: Global Search



VI Contact Us

For more information visit www.orektic.com

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

If you have any concerns or queries then please contact us on support@orektic.com

