Attachments.expert Administrator Guide

By Orektic Solutions LLP

Contents

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

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 Installation Steps

V.I.1 Installation Of Pakcage

Users can install the attachments.expert Salesforce package through App Exchange like any other App Exchange product.

In case of beta or preview releases Customers will be provided with a link, using which they can install the Salesforce Package for attachments.expert.

Follow the below-mentioned Steps to install attachments.expert onto your salesforce instance.

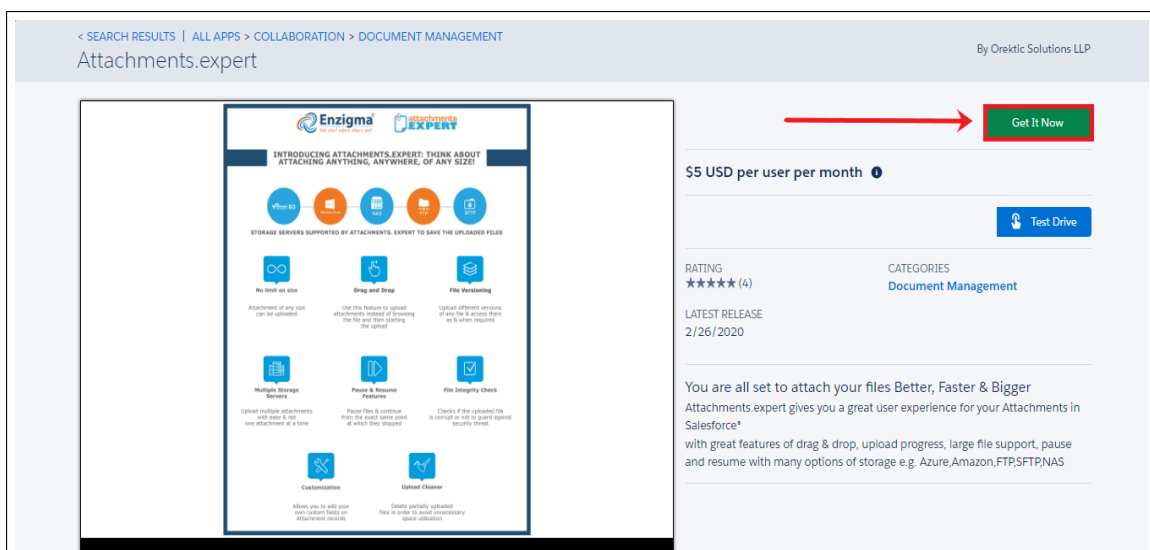1. [Click Here](#) To Install Package From AppExchange

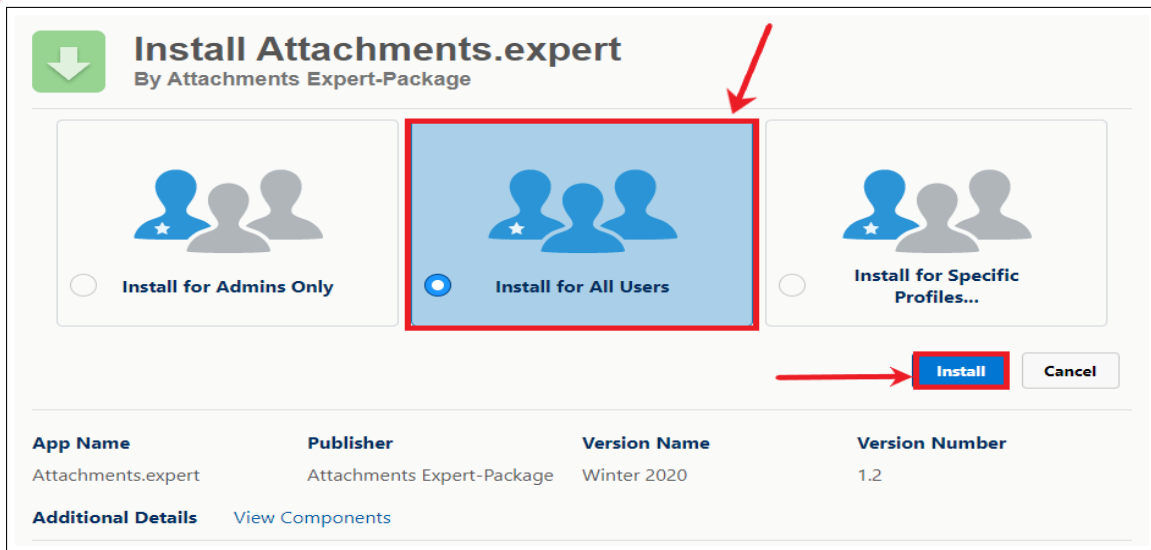**Figure 5.1.1:** Installation Of Package

2. Step 2

Figure 5.1.2: Installation Of Package
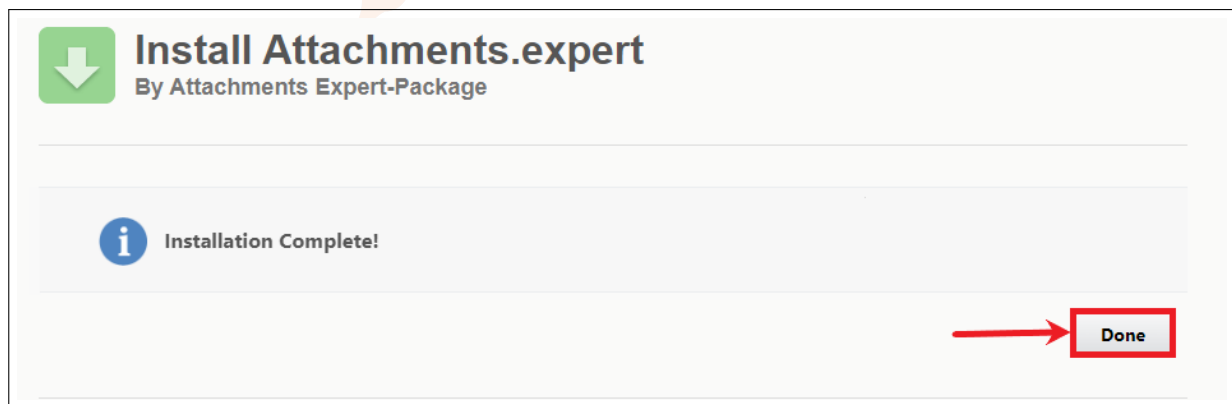
3. Step 3

Figure 5.1.3: Installation Of Package

V.II   Pre- requisites

V.II.1   Hosting Attachments.expert on your Application Server

1. **Hardware Requirement:**

   • 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:**

   • 2GB recommended for > 20 Concurrent Users
   • 4GB recommended for > 40 Concurrent Users

4. **Minimum Hard Disk Space:**

   • 100 GB of free disk space

5. **Operating System:**

   • Windows 7 or above

6. **Web Application Server:**

   • IIS 7.5 or above
   • .NET Framework 4.5
   • SQL Server 2012 (Express or Full)

7. **Environment:**

   • 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 configured to run on your IIS server.

1. Extract the attachments.expert Build from this link to your local machine

2. Go to ''Turn Windows features on or off' on your local machine and enable the following features in your IIS Windows Features Settings:

   (a) FTP Server
   (b) Web Management Tool
   (c) World Wide Web Services
       i. Application Development Feature
          A. Enable all features under it.
       ii. Common HTTP Features
          A. Enable all features under it except WebDav Publishing

3. Run IIS as administrator

    (a) Right Click on Sites

        i. Select Add Website

        ii. Specify your respective Site name to be used for using Attachments Expert on browser in the Site name

        iii. Select ASP .net v4.0 in Application pool

        iv. Browse to the physical path where the Attachments Expert build is saved in the Physical path

        v. Select 'HTTPS' Type in Binding section

        vi. Enter the website name in the Host name

        vii. Select the SSL Certificate for your site

        viii. Check the 'Start Web site immediately' Option

        ix. Click on 'Ok'. A website will be created in IIS with the specified name

    (b) Go to the newly created website

        i. To bind the Application with SQL: Goto Connection Strings

          A. Select the SettingsContext

            • Select Custom Option

            • In custom enter physical path of SQL server and username and password for the SQL

          B. Go to Application Settings

            • Right click on "valid Organizations" and enter Org id for the salesforce instance on which you have to install Attachments Expert(for multiple org id use comma)

          C. Go to HTTPS Response Header

            • Enter all the default values as mentioned in the screenshot below

4. Restart IIS and run the application on your own browser with the newly created website(Eg: https/web.attachments.expert)

Note : Before you create your website please make sure you have added host name with IP your address in your host file.

For Adding your host name with IP please follow the below steps.

1. Open Notepad As "Administrator".

2. Click On "File".

3. Click On "Open".

4. Go to this path -> "C:\Windows\System32\drivers\etc."

5. Open the "hosts" File

6. Add your website name along with IP as shown in below figure.

7. Click On "Save".

Figure 5.2.4: Installation On Application Server

Figure 5.2.5: Installation On Application Server

11

HTTP Response Headers		
Name	**Value**	**Entry Type**
Access-Control-Allow-Credentials	True	Local
Access-Control-Allow-Headers	x-signature-date,content-type,x-content-md5,range,author	Local
Access-Control-Allow-Methods	GET, PUT, POST, DELETE	Local
Access-Control-Allow-Origin	*	Local
Access-Control-Expose-Headers	ETag	Local
Access-Control-Max-Age	6000	Local
X-Powered-By	ASP.NET	Inherited

Table 1: HTTP Response Headers

Note: If you are using IIS Version 10 Please Make Sure You have to enable TLS. To Enable TLS Please Download and Run the Registry file. Click Here to download the Registry file.

V.II.2   Multiple Server Storage Setting

To configure multiple storage server settings Salesforce Administrators can either set the default Storage Profile to the required storage server or create a new profile for each of the servers to be used

V.II.2.1   Default Storage Profile: Salesforce Administrators can set up a default storage server for Attachments Expert as per their requirements through the following guidelines.Default Storage Profile will be provided to save the default server settings. All the files uploaded using Attachments Expert will by default get stored under Default storage unless it is changed while configuring Attachments Expert. This storage profile will be created automatically during installation, the Standard Administrators only need to configure it, as per their requirements. Standard Administrators can make any server as Default Storage. Eg:- If a user want to make Amazon S3 as the Default Storage then the user need to mention Amazon S3 as the Storage Type and its credential in the Secret Key in Default Storage Setting, then AmazonS3 will be configured as a Default Storage

Setup->Install Packages-> Configure->Default

Figure 5.2.6: Default Storage Setting

V.II.2.2   Creating New Profile: Creating a new profile will allow users to attach their files and store them in storage servers of their own choice. Users need to create Profiles for specific servers such as Amazon S3, Azure Blob, or Local Disk using the New Profile Button and further integrate it with the specific server.

Setup->Install Packages-> Configure->New Profile
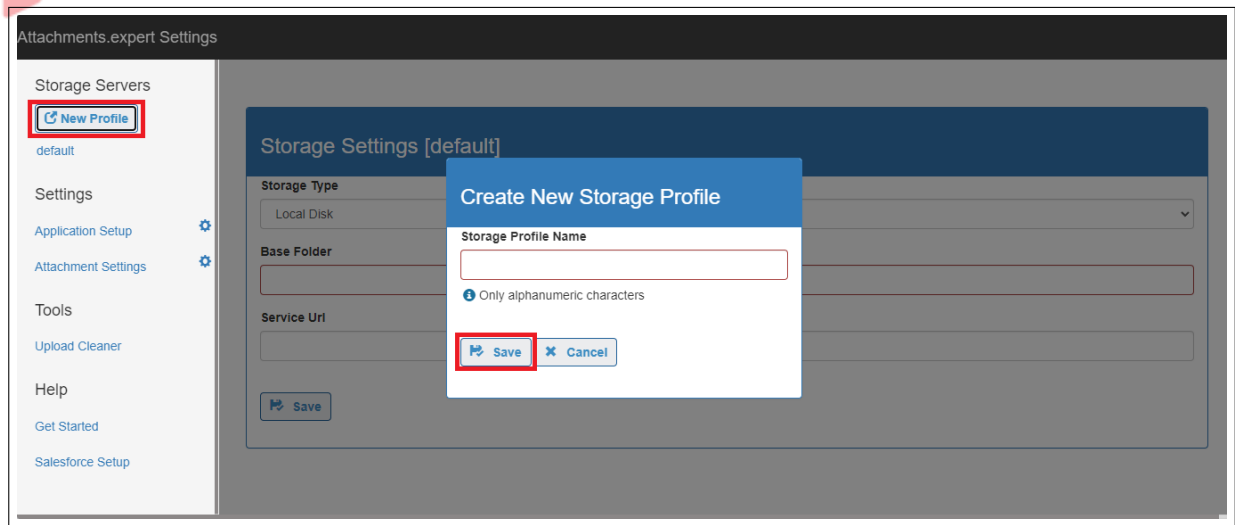
Figure 5.2.7: Creating New Profile

Salesforce administrators can also create multiple storage profiles for the same type of storage server if required. E.g. say your organization is using 2 different buckets for storage of files based on country. You can create two profiles for each country pointing to a respective bucket of Amazon S3. So this way both profiles will be of type Amazon S3 but pointing to 2 different buckets.

Example: Suppose, your organization stores attachments in two different buckets, as per the billing country name on Account record.

Profile 1: AmazonS3_India

Profile 2: AmazonS3_United_States

For satisfying these criteria, you can create two different Storage Profiles as mentioned above with the same type of Storage Server (AmazonS3 in this case) with different bucket names (say India and United States).

In the Visualforce page created for Attachments Expert, you will have to can enter this criteria either by formula field or directly place the condition in the Visualforce page as follows:

The below example shows how to update the Visualforce page for Account object so as to save attachments in the required bucket

Option 1: Formula Field

In the Account object create a new formula field. Eg. Account_StorageProfile and enter the following formula in this field.

Formula : IF(BillingCountry == 'India','AmazonS3_India','AmazonS3_United_States')

Now enter the following code to the Visualforce page for Account object:

Option 2: Visualforce Page Code Changes

Create a new Visualforce page for Attachments Expert on Account object eg. Accounts_Attachments and enter the following code in it:

After making the above change in the Visualforce page, attachments with the respective country

will be saved in the bucket as required by your organization.

Supported Servers:

Currently the supported Servers are:-

V.II.2.2.1   Amazon-S3

Users can save their files on Amazon Server by Creating a New Profile for Amazon S3 or by selecting Amazon S3 in the default server settings and integrate it with their respective Amazon S3 server.

Setup->Install Packages-> Configure> Amazon S3

Instance Storage Server Setting-

Follow the below steps to create a Storage Profile for Amazon S3:

• Click on the New Profile or default Storage Profile for creating Amazon S3 Profile

• Select the Storage Type as Amazon S3.

• Provide the Access Key and Secret Key for your Amazon S3 server.

• Provide the bucket name used by your organization for Amazon S3(For detail settings on bucket name please refer Remote Site and CORS Settings for Amazon S3 explained below)

• Click on Save in order to save the Amazon S3 Storage Settings.

Figure 5.2.8: Amazon S3

Remote Site Settings-

While saving attachments on Amazon S3, user needs to specify the bucket name in which the attachment needs to be saved at the server side.

While saving this setting, user might get the following error while saving the profile settings for Amazon S3

Figure 5.2.9: Remote Site Setting

To avoid this error user will have to add the following remote site settings to their salesforce instance:

The below example will show how to add 'multipart' bucket settings to salesforce:

Go to Setup -> Security Controls -> Remote Site Settings

Create a new page with the following specification:

- Remote Site Name: Multipart (Bucket Name as specified in your server)

- Remote Site URL: https://multipart.s3.amazonaws.com

- Check the Active box

- Save the settings

Note: In the above example, Remote Site Name can consist any name which the user prefer. The Remote Site URL should consist of the specified URL only with the respective bucket name in place of 'multipart'.

CORS Settings -

When you save your settings a CORS setting will be done on your bucket so that this application can access that bucket. If you like to restrict the permissions to the bucket in anyways through CORS please go to your amazon account, and change the CORS configuration.

An example setting is given below which is likely be set by this application. This setting gives access to your bucket from any salesforce instance and application.

```
<?xml version="1.0" encoding="UTF-8" ?>
<corsconfiguration xmlns="http://s3.amazonaws.com/doc/2006-03-01/">
<corsrule>
    <id>attachment.expert</id>
    <allowedorigin>https://*.salesforce.com</allowedorigin>
    <allowedorigin>https://*.force.com</allowedorigin>
    <allowedmethod>GET</allowedmethod>
    <allowedmethod>PUT</allowedmethod>
    <allowedmethod>POST</allowedmethod>
    <allowedmethod>DELETE</allowedmethod>
    <exposeheader>ETag</exposeheader>
    <allowedheader>*</allowedheader>
    <maxageseconds>6000</maxageseconds>
</corsrule>
</corsconfiguration>
```

V.II.2.2.2   Azure   User can save their files on Azure Server by Creating a New Profile or for Azure or by selecting Azure Blob in the default storage server settings and integrate it with their own Azure Blob Server.

Instance Storage Server Setting-

• Click on the New Profile for creating Azure Profile

• Select the Storage Type as Azure.

• Provide the Account Name and Account Key.

• Click on Save in order to save the Azure Storage Server Setting in the Instance.

• Container name will be the name of the folder on Azure server which your organization uses to save the attachment.

Setup->Install Packages-> Configure-> Azure

Figure 5.2.10: Azure Blob

Remote Site Settings -

While saving attachments on Azure Blob, user needs to specify the account name in which the attachment needs to be saved at the server side.

For this it is possible that the user gets the following error while saving the profile settings for Azure Blob.

Figure 5.2.11: Remote Site Setting

To avoid this error user will have to add the following remote site settings to their salesforce instance:

The below example will show how to add 'attachments expert' account settings to salesforce:

Go to Setup -> Security Controls -> Remote Site Settings

Create a new page with the following specification:

• Remote Site Name: Azure Blob Service (Account Name as specified in your server)

- Remote Site URL: https://attachmentsexpert.blob.core.windows.net

- Check the Active box

- Save the settings

CORS Settings -

When you save your settings a CORS setting will be done on your Account, so that this application can access that account. If you like to restrict the permissions to account in anyways through CORS please go to your azure account, and change the CORS configuration.

V.II.2.2.3   Local Disk   User can save their files on their Local machine where IIS has been configured for Attachments Expert by Creating a New Profile for Local Disk and integrate it with the Local Disk. Select the "Storage Profile" as "Local Disk" while uploading the file.

Prerequisites for saving the files on Local Disk:-

-> IIS should be configured for Attachments Expert.

Instance Storage Server Setting

- Click on the New Profile for creating Local Disk Profile

- Select the Storage Type as Local Disk

- Enter the path from the local machine where the attachment needs to be stored in the Base folder

- Enter the host website created in IIS server in the Service URL

- Click on Save in order to save the Local Disk Storage Server Setting in the Instance.

Note: The base folder path mentioned in the above settings should have Read/Write access rights

Figure 5.2.12: Local Disk

V.II.2.2.4   FTP Server   User can save their files on their FTP server through Attachments Expert by Creating a New Profile for FTP Server and integrate it with the corresponding FTP Server. Select the "Storage Profile" as "FTP Server" while uploading the file.

Prerequisites for saving the files on Local Disk:-

-> FTP Server should be configured on your local server and should be accessible outside the local server.

Instance Storage Server Setting-

• Click on the New Profile for creating FTP Server Profile

• Select the Storage Type as FTP Server

• Enter the address/IP of your FTP Server (Please note you can add address and port number of your FTP server by using ":".

• Enter the username and password for your FTP Server

• Enter the Base Folder where you want to save your attachments (e.g. FTP. So attachments will get saved in the FTP folder created in the physical path provided in the FTP server standalone build. E.g. If "D:/Attachments" is the physical path provided in the FTP Server, then attachments will get saved in "D:/Attachments/FTP".)

• Enter the website url created in IIS server in the Service URL field

• Click on Save in order to save the FTP Storage Server Setting in the Instance.

Note: The base folder path mentioned in the above settings should have Read/Write access rights.

Figure 5.2.13: FTP Server

V.II.2.2.5   SFTP Server   User can save their files on their SFTP server through Attachments Expert by Creating a New Profile for SFTP Server and integrate it with the corresponding SFTP Server. Select the "Storage Profile" as "SFTP Server" while uploading the file.

Prerequisites for saving the files on Local Disk:-

-> SFTP Server should be configured on your local server and should be accessible outside the local server.

Instance Storage Server Setting-

- Click on the New Profile for creating SFTP Server Profile

- Select the Storage Type as SFTP Server

- Enter the address/IP of your SFTP Server (Please note you can add address and port number of your SFTP server by using ":".

- Enter the username and password for your SFTP Server.

- Enter the Base Folder where you want to save your attachments (e.g. SFTP. So attachments will get saved in the SFTP folder created in the physical path provided in the SFTP server standalone build. E.g. If "E:/attachments.expert" is the physical path provided in the SFTP Server, then attachments will get saved in "E:/attachments.expert/SFTP".)

- Enter the website url created in IIS server in the Service URL field

- Click on Save in order to save the SFTP Storage Server Setting in the Instance.

Note: The base folder path mentioned in the above settings should have Read/Write access rights

Figure 5.2.14: SFTP Server

V.II.2.3   Field Settings   To use multiple storage servers, user will have to add 'Storage Profile' to 'Fields: On Create' in the attachments.expert Setting. Please review documentation for Attachments Settings for more details.

V.II.3   Attachments.expert Settings

Attachments Settings allow the User to Setup their Attachments Package and other Settings like File Size, Extensions to be Excluded/Included, File name Append/Prepend, Field Related List and Field on Create etc.

The Fields Name Settings description is as mentioned below:

1. **File: Max File Size (MB)**- User can select the Max Size Attachment to be allowed.

2. **Extensions: Exclude? (default: checked)**- User can select the Exclude/Include specific extensions.

   • If 'Exclude' selected, Attachments Expert will allow all extension files excluding the ones provided in field "Ex tensions : To Exclude/Include". E.g. If 'Exclude' selected and "Extensions: To Exclude/Include" field contains value "exe,dll,js", All files can be attached whose extension is not exe or dll or js.

   • If 'Include' selected, Attachments Expert will only allow files with extensions specified in field "Extensions: To Exclude/Include" to be attached. E.g. If 'Include' selected and "Extensions: To Exclude/Include" field contains value "jpg,png", Only files with extension jpg or png can be attached.

3. **Extensions: To Exclude/Include**- This field specifies which extensions are allowed or not allowed. Please review documentation for "Extensions: Exclude?"

4. **Filename: Append?**- User can select Append/Prepend to attach a field to the name of the attachment

   • If 'Append' selected, Attachments Expert will attach a field selected in 'File Name: Field To Append', after the file name. E.g. If 'Append' selected and 'File Name: Field To Append' field contains value "Created Date", attach file name will be "2015-02-10 File1"where 'File1' is the attached file name

   • If 'Prepend' selected, Attachments Expert will attach a field selected in 'File Name: Field To Append', before the file name.

     E.g. If 'Prepend' selected and 'File Name: Field To Append' field contains value "Storage Profile", attach file name will be "File2 default" where 'File2' is the attached file name and 'default' is the storage profile where the file gets stored.

5. **File Name: Field To Append**- This field specifies the name to be attached to the file name. Please review documentation for "File Name: Append?" By default for the first time while using Attachments expert, Record Id will be appended to any file been uploaded.

6. **Check File Integrity?** - File Integrity is maintained by calculating the MD and checksum of the file. This ensures that there is no serious impact on the attachment being uploaded. The calculation of checksum and MD requires some time depending on the size of the attachment, CPU performance, and RAM memory.

7. **Folder: Hierarchy Enable?** – If "Yes" is selected, a section of the folder hierarchy is displayed to the user in a related list of attachments, using which the user can organize attachments in the folder hierarchy within the selected record. This folder hierarchy will also be used to store the attachments on the storage server

8. **Is Debug On? (Internal Use Only)**- If selected as ON allows the Attachments Expert Support/Developers to debug. It is for internal use only and this should strictly be used by our Developers/Support of Attachments Expert

Setup->Install Packages->Configure->Attachment Settings

Figure 5.2.15: Attachments Settings

Package and Field Settings description is as mentioned below : -

1. **Fields: Related List**- Fields to be displayed on the page layout of Attachments expert. If Storage Profile field is added to this field, then this field will be displayed on the record page of attachments.expert and also in Global Search.

2. **Fields: On Create**- Fields to be displayed while uploading the new attachment, which will prompt the user to enter values for given fields and will start upload only after "Start" button is clicked. If Storage Profile field is added to this field and is changed before starting the upload of attachment, the attachment will be uploaded to chosen storage_profile instead of storage_profile provided as Attachments component parameter.

3. **Fields: Prompt on Update** - This field if enabled, will show the above mentioned "Fields: on Create" while updating an existing attachment (creating new version of existing attachment). Changing the storage_profile while adding a new version (updating an attachment) will have no effect on the existing attachment, and irrespective of storage_profile chosen while updating, the file will be uploaded to the original storage server where the existing attachment was stored.

Setup ->Install Packages ->Configure ->Attachments Settings
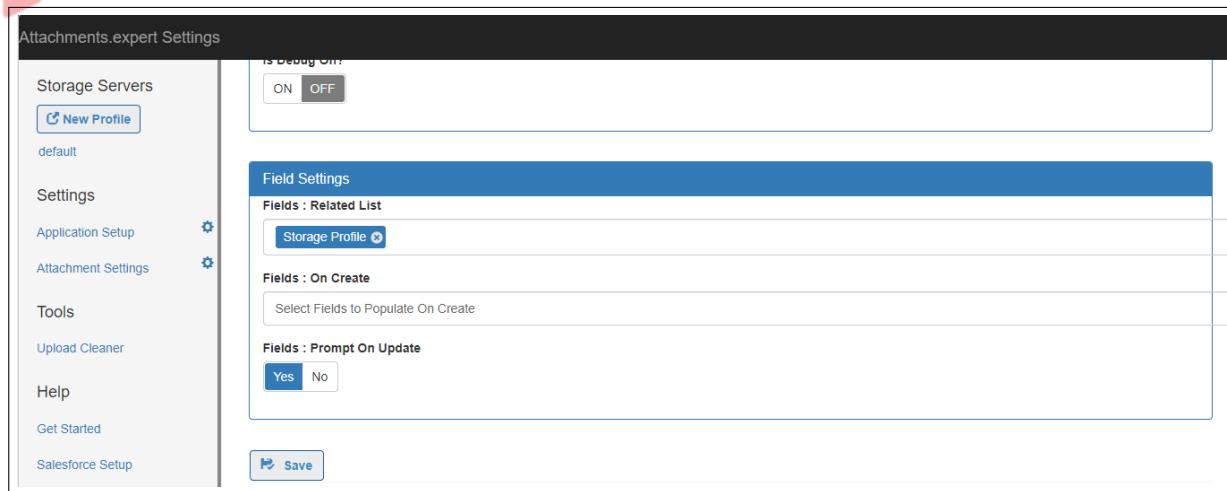
Figure 5.2.16: Attachments Settings

Working of Attachments Setting:-

Setup->Install Packages->Configure->Attachment Settings.

1. **File : Max File Size (MB)**- If the max file limit in Attachment Settings is specified to 20MB, then the user will be able to upload attachments with a max limit as 20MB only. Files with size greater than 20MB will not get uploaded and an error message will be displayed for the same
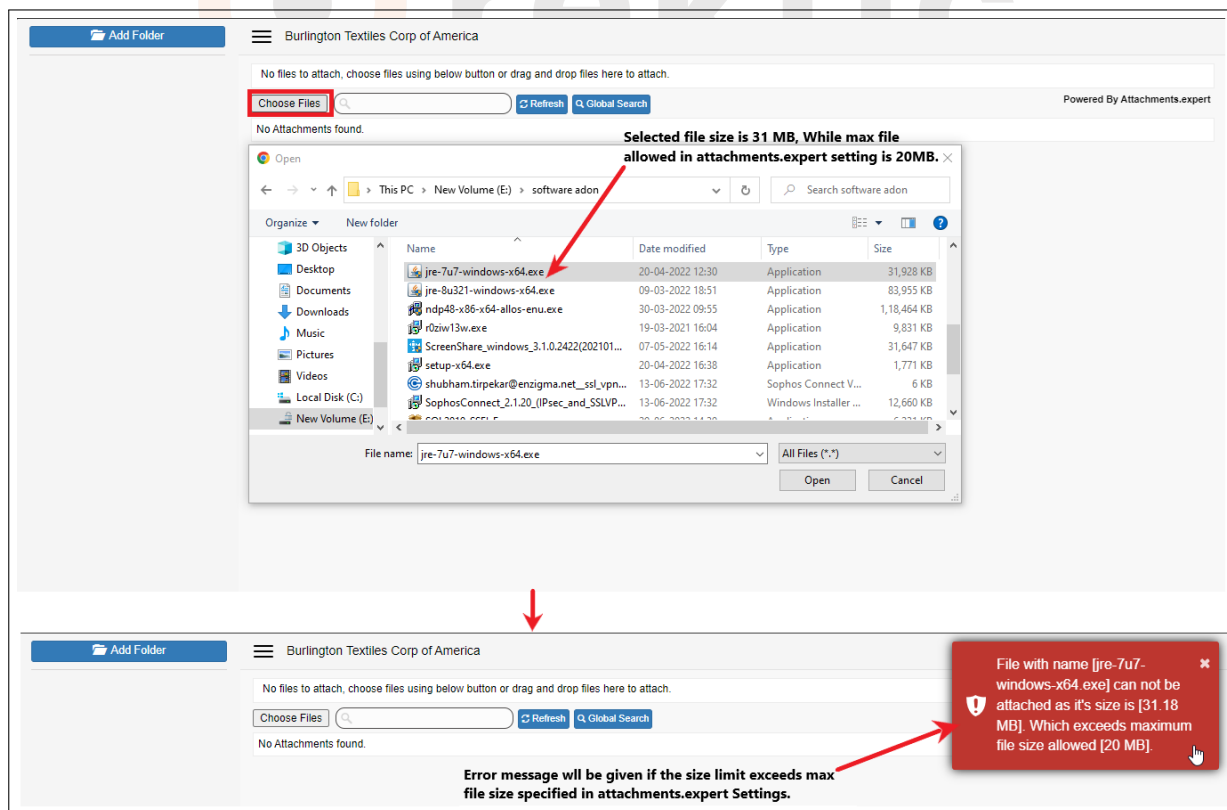

Figure 5.2.17: Maximum File Size

2. **Filename: Append**- If the user selects the Append option then the field selected from the dropdown gets Appended with the File after Uploading. eg: Selected Append with Create Date then Create Date get Appended with the file (File -24) – Fig-4 (d). In the example below: Uploaded File Name: 24 File name stored on the server: 24 2015-01-30 07:15:30 (Created Date with a time of upload gets Appended to the original file name)

3. **File Name: Prepend**- If the user selects the Prepend option then the field selected from the dropdown gets Prepended with the File after Uploading. e.g.: Select Prepend with Create Date then, Create Date get Prepended with the file (File -23) – Fig-4 (e) In the example below: Uploaded File Name: 23 File name stored on the server: 2015-01-30 07:18:09 23 (Created Date with a time of upload gets Prepended to the original file name)

4. **Fields: Related List**- The Field selected in the Related List dropdown of the Attachment Settings page will be reflected in the related list of the Object Record after uploading the File. eg:- Storage Profile will be reflected after uploading the File in this case.
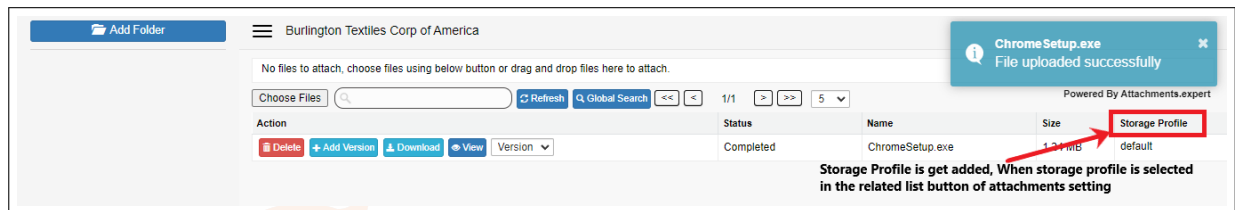

Figure 5.2.18: Related List

5. **Fields: On Create**- The Field selected in On Create dropdown of the Attachment Settings page will be reflected at the time of uploading the File on the Object Record. e.g.:- Storage Profile and comment will be reflected while uploading the File in this case.
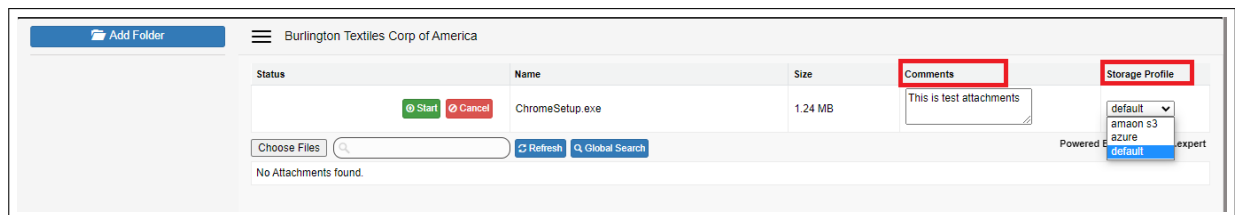

Figure 5.2.19: On Create

V.II.4   Salesforce Configuration

User can enable attachments.expert on most standard or all custom object of his choice if lookup of that object can be created on Attachment object of Attachments Expert

Enable Attachments Expert on standard object:

Please follow the steps below to setup attachments.expert on a Standard Object (eg. We will enable attachments.expert for Account object) -

1. Create a lookup field called 'Account' on Object 'Attachment'

   Setup ->Create-> Objects ->Attachment ->New Custom Field ->Lookup

2. Create a lookup field called 'Account' on Object 'Folder'

   Setup ->Create-> Objects ->Folder ->New Custom Field ->Lookup

3. Now create a Visualforce page called Account_Attachments and Add following code to the Visualforce page.

   Setup-> Develop ->Pages ->New

   <apex:page showheader="false" docType="html-5.0" standardController="Account" > <c:AttachmentsExpert RecordId="!account.Id" FolderPath="!account.Name" LookupFieldName="ATT_EXP_Account_c"/></apex:page>

   RecordId: RecordId parameter passes parent record id to the Attachments, under which attachments will be created. E.g. Account's Id in this case.

   FolderPath: FolderPath will specify in which folder on storage server the file should be saved. This is configurable and you can also use any formula field to specify path of your choice based on the record.

   LookupFieldName: LookupFieldName should be the API name of the lookup field on Attachment and Folder using which Attachment and Folder are related to the parent record, for which the Record Id is provided above

4. Now add this page to the layout of the Account object.

   Steps to Add Attachments Expert VisualForce Page to Account object layout:

   - In your Salesforce account, Click on the 'Setup' link and then select the Salesforce object page layout for which you want to use Attachments Expert. Refer the mentioned example on Account object.
   - Go to the Visualforce pages section and add Attachments Expert page to the Account layout.
   - Save the page layout. Now you are ready to use the Attachments Expert for that object.
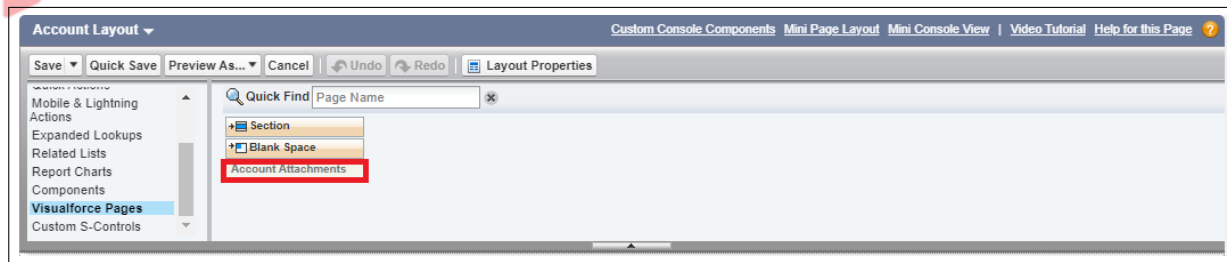
Figure 5.2.20: Salesforce Configuration

Now you can go to any account which has the above layout displayed and start using attachments.expert

When the user installs the Package then by default Attachment Section get enabled on Account object of their instance. It can be enabled on other Standard or Custom Object following the above example.

Enable Attachments.expert on custom object:

Please follow the steps below to setup attachments.expert on a Standard Object (eg. We will enable attachments.expert for Review object) -

1. Create a lookup field called 'Review' on Object 'Attachment'

   Setup ->Create -> Objects ->Attachment ->New Custom Field ->Lookup

2. Create a lookup field called 'Review' on Object 'Folder'

   Setup ->Create-> Objects ->Folder ->New Custom Field ->Lookup

3. Now create a Visualforce page called Review_Attachments and Add following code to the Visualforce page

   <apex:page showheader="false" docType="html-5.0"
   standardController="Review_c" > <ATT_EXP:AttachmentsExpert
   RecordId="!Review_c.Id" FolderPath="!Review_c.Name"
   LookupFieldName="Review_c" /> </apex:page>

   In the above example parameters are described as follows

   RecordId: RecordId parameter passes parent record id to the Attachments, under which attachments will be created. E.g. Review Id in this case

   FolderPath: Folderpath will specify in which folder on storage server the file should be saved. This is configurable and you can also use any formula field to specify path of your choice based on the record.

   Lookup Field Name: Lookup Field Name should be the API name of the lookup field on Attachment and Folder using which Attachment and Folder is related to the parent record, for which the Record Id is provided above.

27

4. Now add this page to the layout of the Review object.

Steps to Add Attachments Expert Visual Force Page to Review object layout:

- In your Salesforce account, Click on the 'Setup' link and then select the object for which Attachments expert is to be enabled.
- Go to the page layout of this custom object. Refer the mentioned example on Review object
- Go to the Visualforce pages section and add Attachments Expert page to the Review layout
- Save the page layout. Now you are ready to use the Attachments Expert for that object

V.II.5   Working of Attachment section

User can upload the desired file on any Custom or most of the Standard Object after creating the Attachments Expert on particular Object.

V.II.6   Upload Cleaner - (Cleaner for partially uploaded files)

While uploading attachments on any of the servers, if the uploading process is aborted in between then such files occupy some space in the server but are not visible on the attachments expert page.

So Upload Cleaner is used to delete such partially uploaded files.

Upload Cleaner can be used through the option provided under 'Tools' in attachments.expert Settings Page

Figure 5.2.21: Upload Cleaner

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