S3-Link Mass Salesforce Files Migration

Introduction

This user guide simplifies the process of how you can migrate Salesforce files related to multiple Salesforce objects. Also it displays a list of all previous migration jobs which helps you to understand how much migration is completd. This also allows you to start multiple migrations at the same time.

Functionality Overview

If you want to mass migrate tSalesforce files into the Amazon S3, you can follow the below steps to start the migration. You can also schedule the recursive auto migration of your Salesforce Files.

Start New Migration

You can start multiple files migration jobs. Follow below steps to start a new files migration job.

1. Click on App Launcher and open S3-Link

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Config Config		Consumer Goods Visit Execution Execute retail store visits by viewing and updating visit details.	**	=	Business Rules Engine Create and maintain business rules that perform complex lookups and calculations.		Ø	Bolt Solutions Discover and manage business solutions designed for your industry.	
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<u>,</u> ↑,	Accounts	Cases			Finance Transactions C	Irders		S3-Link Admin Interface Configurations	
The syst	em can auto move	content documents, standard attachments and ema	lattachment	ts in Amazon	S3. Set various properties for the auto move. Set	etting for fold	der architecture.		

2. Go to the S3-Link Salesforce Files Migration

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	S3-Link Salesforce Files Migration Jobs(0)											
	No records found.											

- 3. Click New to start the new migration
- 4. It will open pop up to set the file migration criteria for the new migration

	S3-Link Salesforce Files Migration
	Salesforce Files smaller than 11 MB will be migrated using this feature. For large files, S3-Link File Migration Logs will be created and you can migrate those large files from there
Salesforce File Ol	ject 🕦
 Salesforce Fi 	es(ContentDocument) 🔿 Attachments(Attachment)
Select Object	
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Select Object	· · · · · · · · · · · · · · · · · · ·
Salesforce Parent	Record Filter Type
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SOQL Where Clau	e for Salestorce Hies / Attachments
Delete Migra	ted Salesforce Files / Attachments 🕚

5. Select **Salesforce File Object**. If you want to migrate lightning Salesforce Files then select Salesforce Files(ContentDocument). If you want to migrate classic Notes & Attachments select Attachments(Attachment).

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6. **Select Object** whose related Salesforce Files you want to migrate from Salesforce to Amazon S3.

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Delete Migrated	alesforce Files / Attachments 🌘					
		Start Migration	Abort Schedule Migration	Cancel		

7. If you want to migrate Salesforce Files related to all records of the selected object then select **All** in Salesforce Parent Record Filter Type.

	S3-Link Salesforce Files Migration Salesforce Files smaller than 11 MB will be migrated using this feature. For large files, S3-Link File Migration Logs will be created and you can migrate those large files from there
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Select Object	
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Delete Migrate	d Salesforce Files / Attachments

8. If you want to migrate Salesforce Files related to records older than specific days then select **Parent Record Age** in Salesforce Parent Record Filter Type and give the age(in days) in the **Parent Record Age** field.

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 If you want to migrate Salesforce Files related by records returned by a SOQL then select SOQL Filter in Salesforce Parent Record Filter Type and give the SOQL Where Condition in the SOQL Where Clause(for Parent Records)

Salesforce File Object		
Salesforce Files(ContentDocument)	Attachments(Attachment)	
Select Object 🕕		
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SOQL Where Clause(for Parent Records)	0	
isClosed = true		
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SOQL Where Clause for Salesforce Files /	ittachments 🕖	
Delete Migrated Salesforce Files /	Attachments 🕦	
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10. If you want to add filters for the Salesforce Files or Attachments then give the where condition in the **SOQL Where Clause for Salesforce Files / Attachments**

S3-Link Salesforce Files Migration Salesforce Files smaller than 11 MB will be migrated using this feature. For large files, S3-Link File Migration Logs will be created and you can migrate those large files from t	here		
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Select Object		-	
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SOQL Where Clause(for Parent Records)			П
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Delete Migrated Salesforce Files / Attachments 🔘			8

11. If you just want to upload the Salesforce Files into Amazon S3 and also want to delete them from Salesforce then check the **Delete Migrated Salesforce Files / Attachments** checkbox. You can keep this false initially and later once the job is completed, you can verify if all files are uploaded properly in Amazon S3 or not and then if everything is good, you can start the deletion of those migrated files using the **Start Files Deletion** action for the job.

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isClosed = true				
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12. Click Start Migration

13. Once migration is started, a success message will be displayed and you will see your job in the list from there you can track the progress of the job.

s3-Link Salesford	Ce Succ	ess ackground job has	been started to migrate Salesforce files. You	will be notified when the job will b	pe completed. You	an close the screen and conti	nue with your tasks.	
🗴 S3-Link Salesforce	Files Migratio	n Jobs(1)						New
Job Number	Status	Object	Started Date	Job Owner	Delete	Last Run Date	Next Run Date	Action
00001	New	Case	4/5/2024, 03:11 AM	Anil Meghnathi				•

Note: The time to complete the migration will depend on the number of parent records and files returned by the criteria you provided.

Check Migration Job Progress

- 1. Click on App Launcher and open S3-Link
- 2. Go to the S3-Link Salesforce Files Migration
- 3. It will display a list of all migration jobs which have been started in the past with Status of each job.

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S3-Link Salesforce Files Migration Jobs(2)													
Job Number	Status	Object	Started Date	Job Owner	Delete	Last Run Date	Next Run Date	Action					
00002	Files Migration Completed	Account	4/4/2024, 06:40 AM	Anil Meghnathi				v					
00001	Files Migration Completed	Account	4/4/2024, 06:30 AM	Anil Meghnathi				•					

4. If you want to see full details of the migration job along with progress then click on the Job Number link or click the **View** in Action menu for the job.

🚼 S3-Link Sal	esforce Files Migration							
S3-Link Sales	sforce Files Migration Jobs(2)		Start of Data		2.14			New
Job Number	Status	Object	Started Date	Job Owner	Delete	Last Run Date	Next Run Date	Action
00002	New	Account	4/4/2024, 06:40 AM	Anil Meghnathi				•
00001	Files Migration Completed	Account	4/4/2024, 06:30 AM	Anil Meghnathi				0
								Start Files Del View

5. It will display the full details of the job along with the progress.

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Salesforce Parent Record Filter Type	
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SOQL Where Clause for Salesforce Files / Attachments	
Delete Migrated Salesforce Files / Attachments	
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	100% Comple
Files Migration (23 Records)	100% Comple
Files Migration (23 Records)	
Files Migration (23 Records)	

Abort Migration Job

You can abort any migration job which is In Progress. Follow below steps for that.

- 1. Click on App Launcher and open S3-Link
- 2. Go to the S3-Link Salesforce Files Migration
- 3. If the job is still running and if you want to abort the salesforce files migration job then click **Abort** in the Action menu for that job. As shown in Image below. Note: Abort button will not be available if the job is completed or it is a scheduled migration job.

S3-Link Sal	esforce Files Migration							
S3-Link Sale	sforce Files Migration Jobs(2)		ner of the second					
b Number	Status	Object	Started Date	Job Owner	Delete	Last Run Date	Next Run Date	Action
b Number 002	Status New	Object Account	Started Date 4/4/2024, 06:40 AM	Job Owner Anil Meghnathi	Delete	Last Run Date	Next Run Date	Action
b Number 002 001	Status New Files Migration Completed	Object Account Account	Started Date 4/4/2024, 06:40 AM 4/4/2024, 06:30 AM	Job Owner Anil Meghnathi Anil Meghnathi	Delete	Last Run Date	Next Run Date	Action Action

4. This will stop the migration job

Start Files Deletion Job

If **Delete Migrated Salesforce Files / Attachments** was disabled at the time of starting the migration and you want to start the deletion of Salesforce Files which are uploaded in Amazon S3 via that job, follow below steps.

- 1. Click on App Launcher and open S3-Link
- 2. Go to the S3-Link Salesforce Files Migration
- 3. Click **Start Files Deletion** from the Action menu for the job which is completed and you want to start the deletion of migrated files by that job. Note : The **Start Files Deletion** button will be displayed only for those migration jobs which are completed and Delete Migrated Salesforce Files / Attachments is disabled.

S3-Link Sales	force Files Migration Jobs(2)							
ob Number	Status	Object	Started Date	Job Owner	Delete	Last Run Date	Next Run Date	Action
0002	New	Account	4/4/2024, 06:40 AM	Anil Meghnathi				
0001	Files Migration Completed	Account	4/4/2024, 06:30 AM	Anil Meghnathi				0

4. This will start the background job to delete all Salesforce files migrated using this job