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**
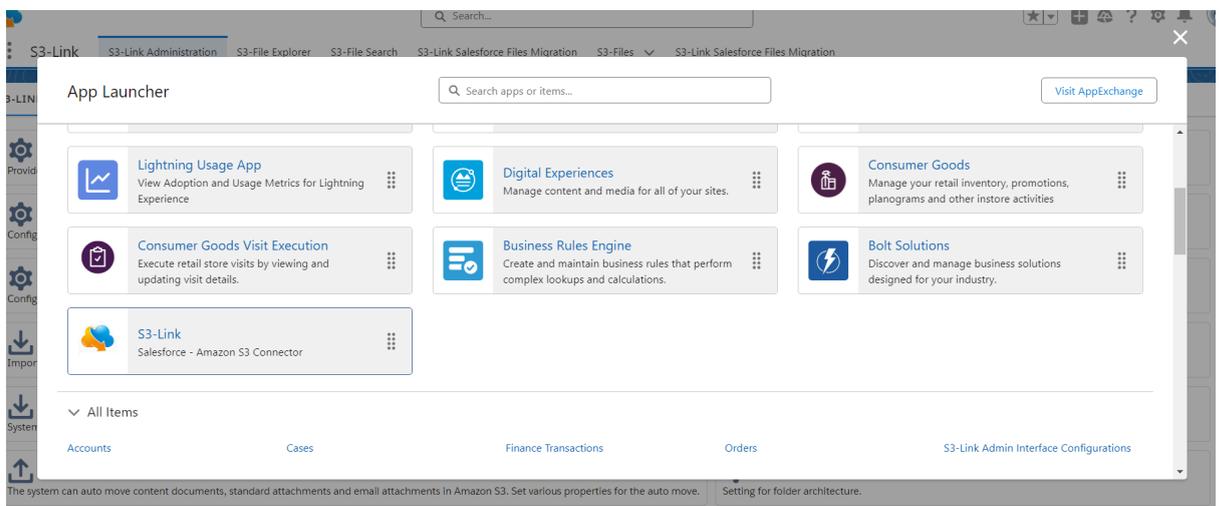
2. Go to the **S3-Link Salesforce Files Migration**
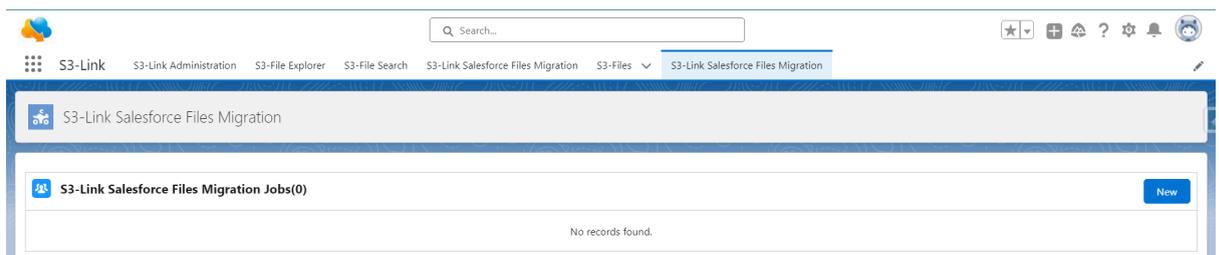
3. Click **New** to start the new migration

4. It will open pop up to set the file migration criteria for the new migration

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).

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

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.

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.

9. 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)**

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**

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.

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.

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.

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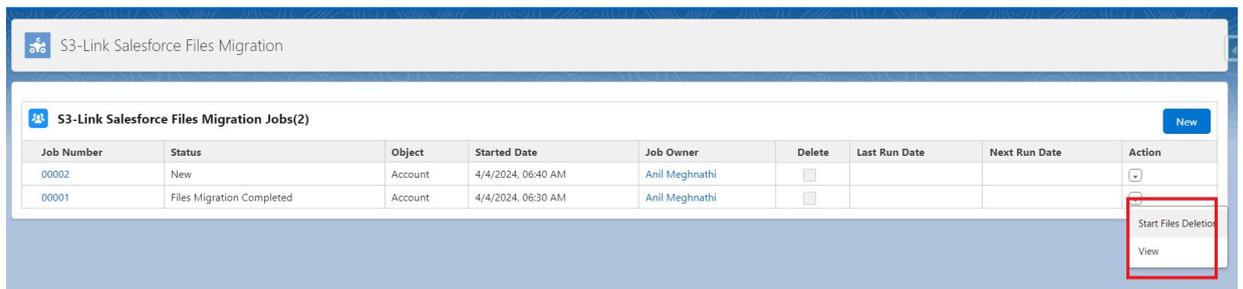
5. It will display the full details of the job along with the progress.
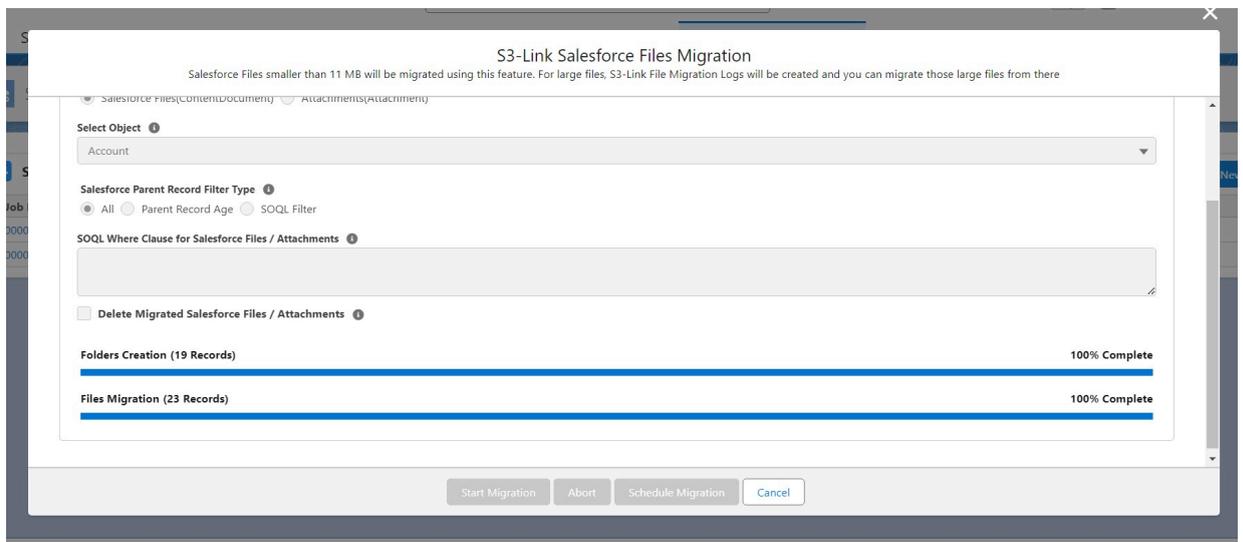
Abort Migration Job

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.

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.

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