

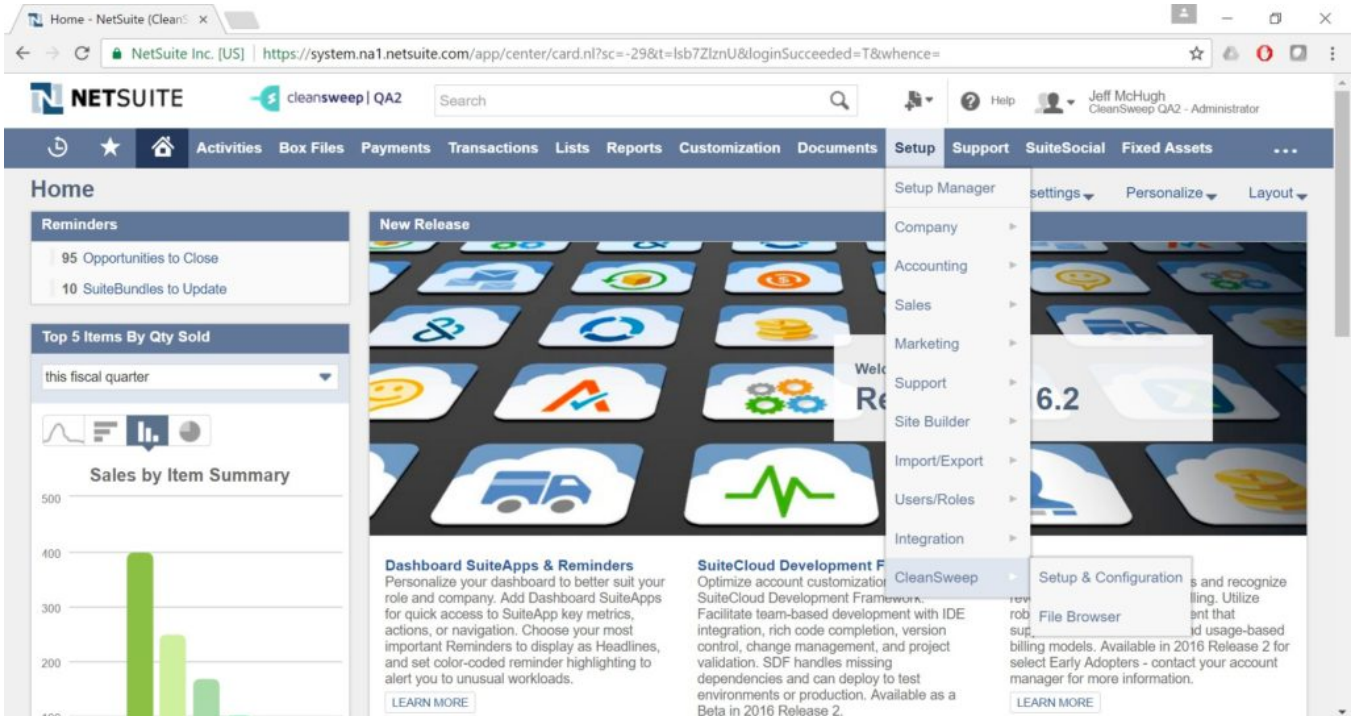
HELP

by Techfino

1. QUICK START GUIDE 3
2. FAQ 14

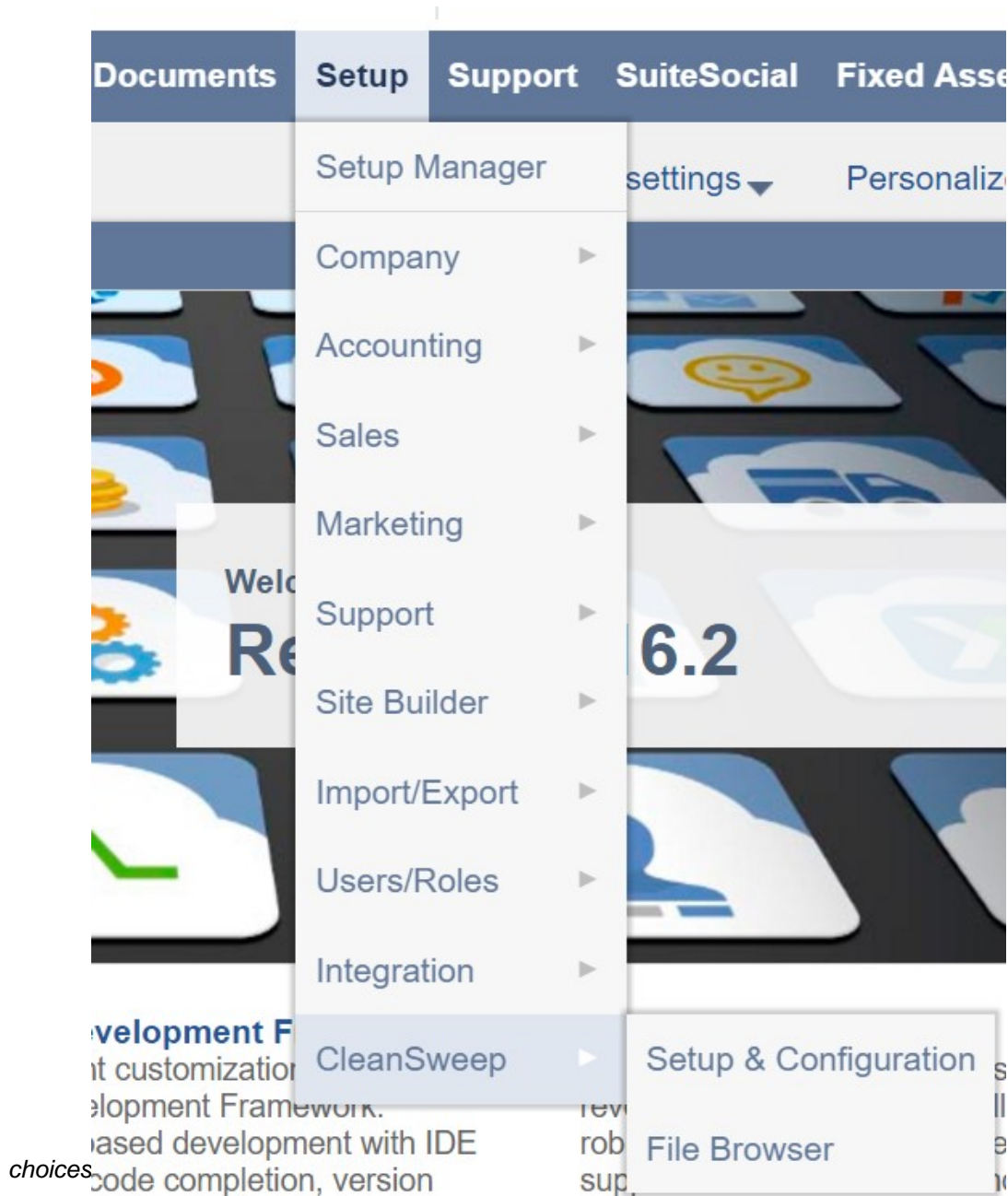
1. CLEANSWEEP FILE MANAGER – QUICK START GUIDE

Upon installation of the software, you will see the CleanSweep selection under the Setup menu. Choose “Setup & Configuration” in the sub menu to configure your settings.



(<http://techfino.com/wp-content/uploads/2017/06/fig1.jpg>)

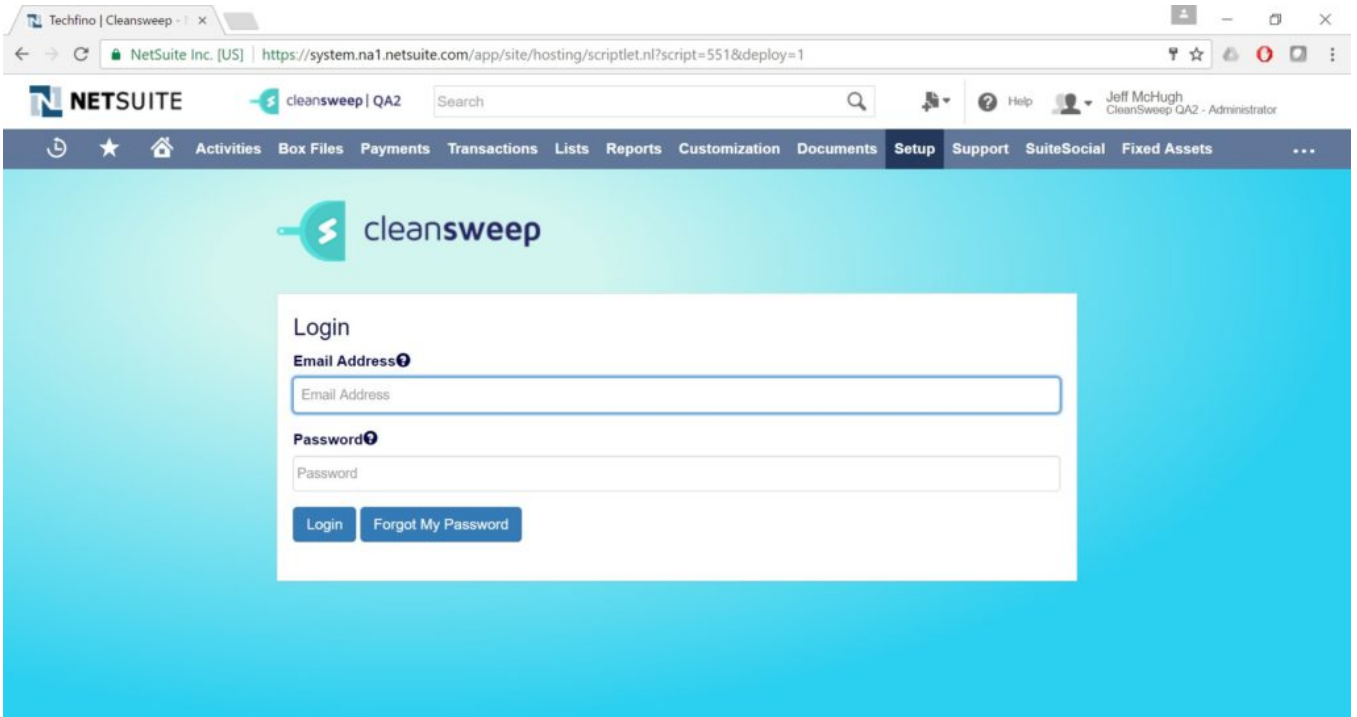
Fig. 1 – CleanSweep selection under the Setup menu in NetSuite reveals Setup & Configuration and File Browser



(<http://techfino.com/wp-content/uploads/2017/06/fig1a.jpg>)

Fig. 1a – CleanSweep selection under the Setup menu in NetSuite reveals Setup & Configuration and File Browser choices

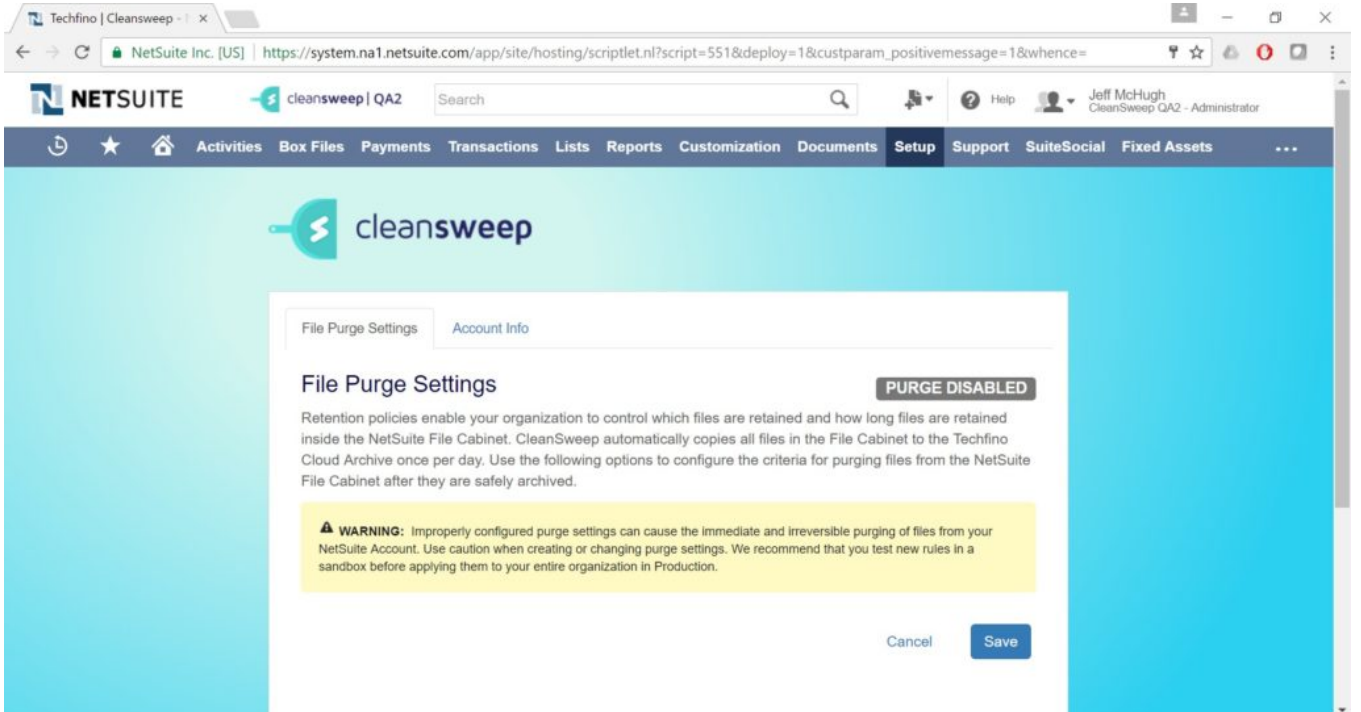
The first time you use the software, you will be prompted to login. Consult the email you received from sales@techfino.com to retrieve your credentials, and enter them. Please check your spam filter if you don't see it in your inbox.



(<http://techfino.com/wp-content/uploads/2017/06/fig2.jpg>)

Fig. 2 – Login screen

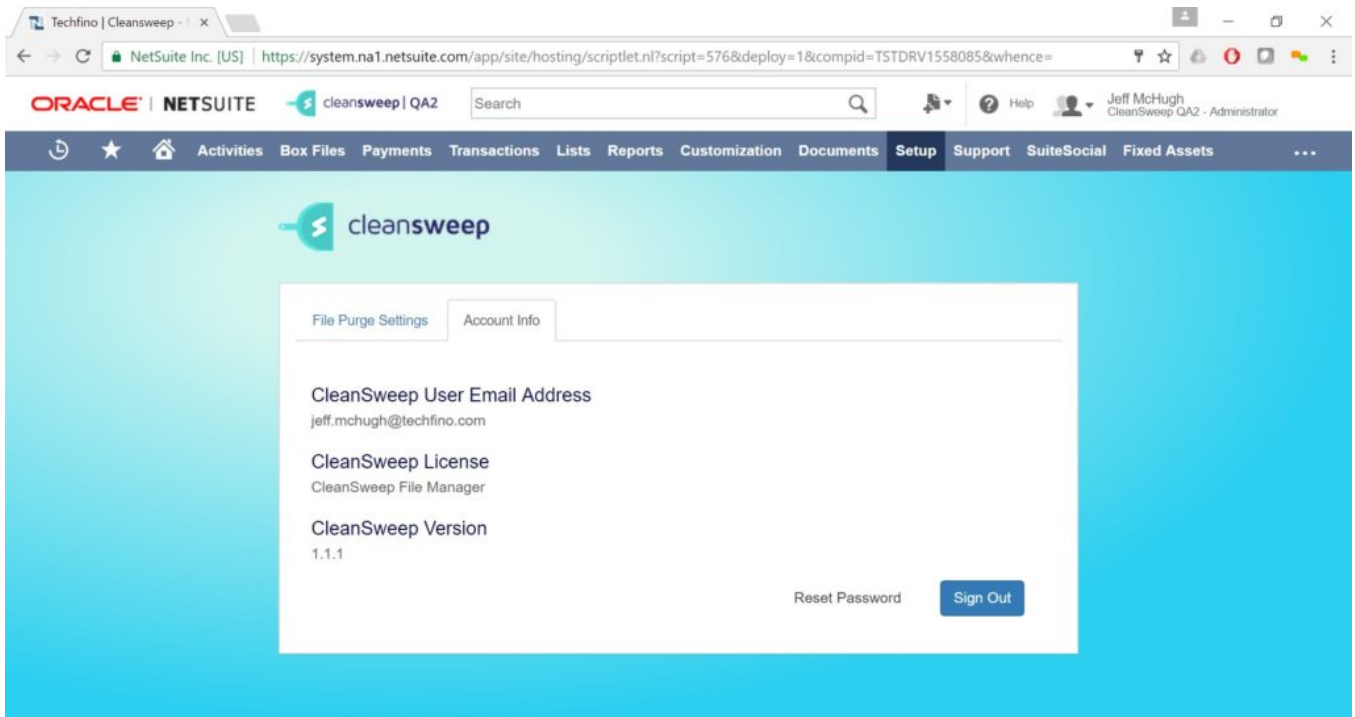
Upon login, you will see the File Purge Settings screen, where you can make your archive/purge selections.



(<http://techfino.com/wp-content/uploads/2017/06/fig3.jpg>)

Fig. 3 – File Purge Settings tab of Setup & Configuration screen

Choosing the Account Info tab will allow you to see your licensing information, and reset your password if needed.



(<http://techfino.com/wp-content/uploads/2017/06/fig4.jpg>)

Fig. 4 – Account Info tab of Setup & Configuration screen

The File Purge Settings screen is where you will setup a retention policy, select the types of files you wish to purge, flag any file or files that you wish to preserve in NetSuite, and find other customizable settings. Also, it is here where you will set a schedule for the purge process, which will also drive the file archive process. The purge process occurs daily or weekly, depending on your choice. (see Fig. 5).

File Purge Settings

PURGE ENABLED

Retention policies enable your organization to control which files are retained and how long files are retained inside the NetSuite File Cabinet. CleanSweep automatically copies all files in the File Cabinet to the Techfino Cloud Archive once per day. Use the following options to configure the criteria for purging files from the NetSuite File Cabinet after they are safely archived.

WARNING: Improperly configured purge settings can cause the immediate and irreversible purging of files from your NetSuite Account. Use caution when creating or changing purge settings. We recommend that you test new rules in a sandbox before applying them to your entire organization in Production.

Retention Policy

Configure how long to retain files in the NetSuite File Cabinet before they are purged.

Do Not Retain - Purge All Files ▼

File Types To Purge

Configure which file types to purge.

BMP Image ✕

File Size

Configure purge of files larger or smaller than a specified size.

- Purge files regardless of size.
- Purge only files larger than a specified size.
- Purge only files smaller than a specified size.

Purge only files **smaller** than:

20

KBs

Select Specific Files To Preserve

Keep the following files inside NetSuite indefinitely. [Click here](#) to add/remove files from this list.

-- No Files Selected To Preserve --

Purge Schedule

When would you want the purge process to run?

- Daily
- Weekly

2:00 pm ▼

(<http://techfino.com/wp-content/uploads/2017/06/fig5.jpg>)

Fig. 5 – File Purge Settings

File Purge Settings

PURGE ENABLED

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Retention Policy

Configure how long to retain files in the NetSuite File Cabinet before they are purged.

Do Not Retain - Purge All Files ▼

- Do Not Retain - Purge All Files
- Retain 1 Year, Using Create Date
- Retain 1 Year, Using Modified Date
- Retain 2 Years, Using Create Date
- Retain 2 Years, Using Modified Date
- Retain 3 Years, Using Create Date
- Retain 3 Years, Using Modified Date
- Retain 4 Years, Using Create Date
- Retain 4 Years, Using Modified Date
- Retain 5 Years, Using Create Date
- Retain 5 Years, Using Modified Date
- Retain 6 Years, Using Create Date
- Retain 6 Years, Using Modified Date
- Retain 7 Years, Using Create Date
- Retain 7 Years, Using Modified Date

an a specified size.

Purge only files **smaller** than:

ize. KBs

size.

Keep the following files inside NetSuite indefinitely. [Click here](#) to add/remove files from this list.

-- No Files Selected To Preserve --

Purge Schedule

When would you want the purge process to run?

Daily Weekly

(<http://techfino.com/wp-content/uploads/2017/06/fig6.jpg>)

Fig. 6 – Retention Policy choices

On the File Purge Settings tab, you will see a variety of Retention Policy choices. Please make your selections carefully, as once files are purged, they cannot be retrieved.

File Cabinet after they are safely archived.

WARNING: Improperly configured purge settings can cause the immediate and irreversible purging of files from your NetSuite Account. Use caution when creating or changing purge settings. We recommend that you test new rules in a sandbox before applying them to your entire organization in Production.

Retention Policy

Configure how long to retain files in the NetSuite File Cabinet before they are purged.

Do Not Retain - Purge All Files ▼

File Types To Purge

Configure which file types to purge.

|

- All Files
- AutoCad
- BMP Image
- CFF File
- Compressed Tar File
- Configuration File
- CSS File
- CSV File
- EOT File
- Excel File

is smaller than: [] KBs

Remove files from this list.

Purge Schedule

When would you want the purge process to run?

Daily Weekly

2:00 pm ▼

Cancel

Save

(<http://techfino.com/wp-content/uploads/2017/06/fig7a.jpg>)

Fig. 7a – File types to purge

The File Types to Purge dropdown allows you to select any combination of file types, including All Files.

cloud provider once per day. Use the following options to configure the criteria for purging files from the NetSuite File Cabinet after they are safely archived.

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Retention Policy

Configure how long to retain files in the NetSuite File Cabinet before they are purged.

Do Not Retain - Purge All Files ▼

File Types To Purge

Configure which file types to purge.

BMP Image x EOT File x AutoCad x

- All Files
- AutoCad
- BMP Image
- CFF File
- Compressed Tar File
- Configuration File
- CSS File
- CSV File
- EOT File
- Excel File

is smaller than: KBs

Remove files from this list.

Purge Schedule

When would you want the purge process to run?

Daily Weekly

2:00 pm ▼

Cancel

Save

(<http://techfino.com/wp-content/uploads/2017/06/fig7b.jpg>)

Fig. 7b – File types to purge

You can also specify purge settings by file size.

File Size

Configure purge of files larger or smaller than a specified size.

- Purge files regardless of size.
- Purge only files larger than a specified size.
- Purge only files smaller than a specified size.

Purge only files **larger** than:

 KBs

Select Specific Files To Preserve

Keep the following files inside NetSuite indefinitely. [Click here](#) to add/remove files from this list.

-- No Files Selected To Preserve --

Purge Schedule

When would you want the purge process to run?

- Daily
- Weekly

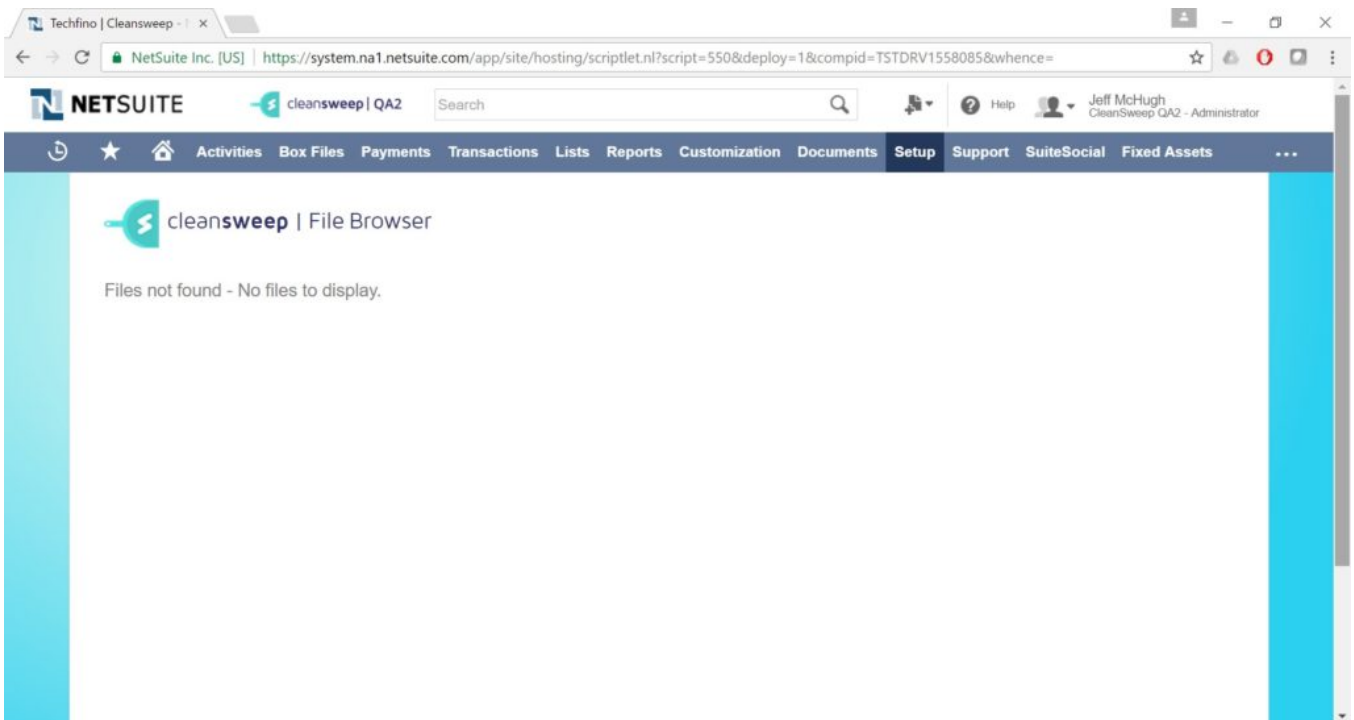
Cancel

Save

(<http://techfino.com/wp-content/uploads/2017/06/fig8.jpg>)

Fig. 8 – File size parameters

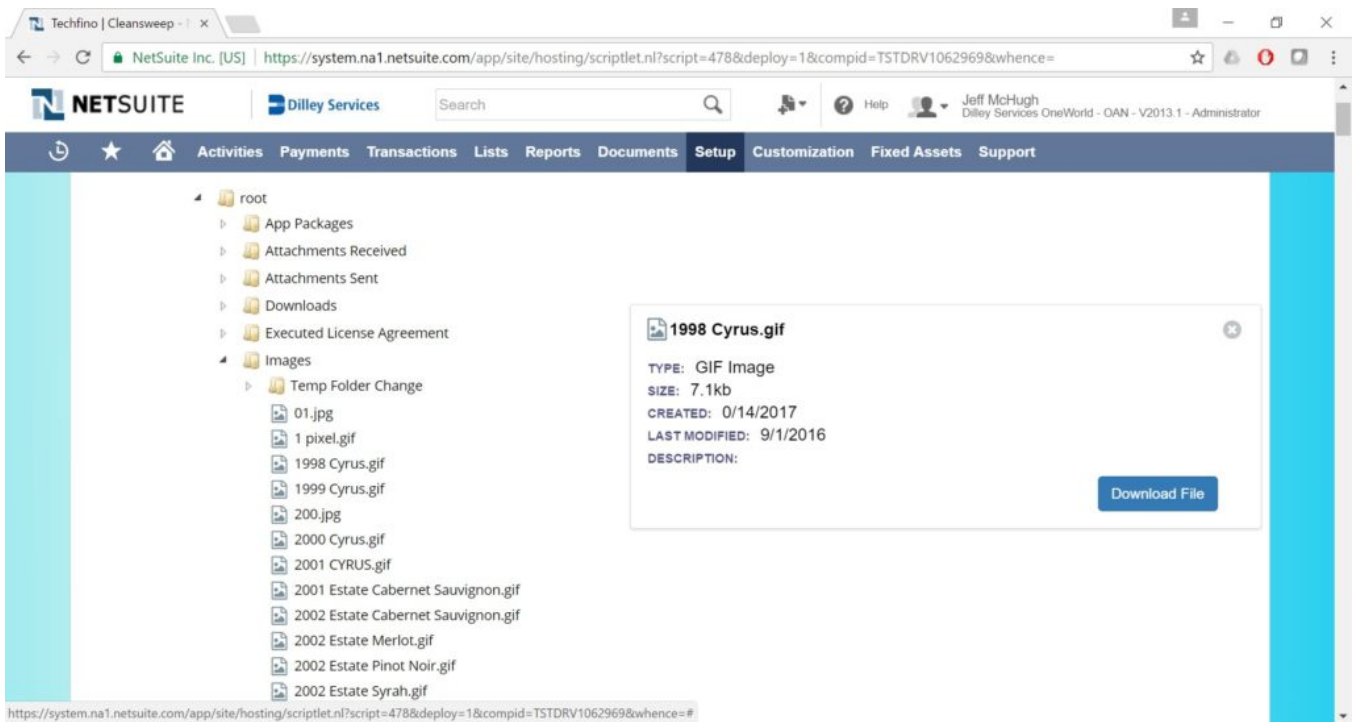
Choosing the File Browser selection in the CleanSweep menu will launch the File Browser window. Until an archive has run, there will be no files to display.



(<http://techfino.com/wp-content/uploads/2017/06/fig9.jpg>)

Fig. 9 – File Browser – no files to display

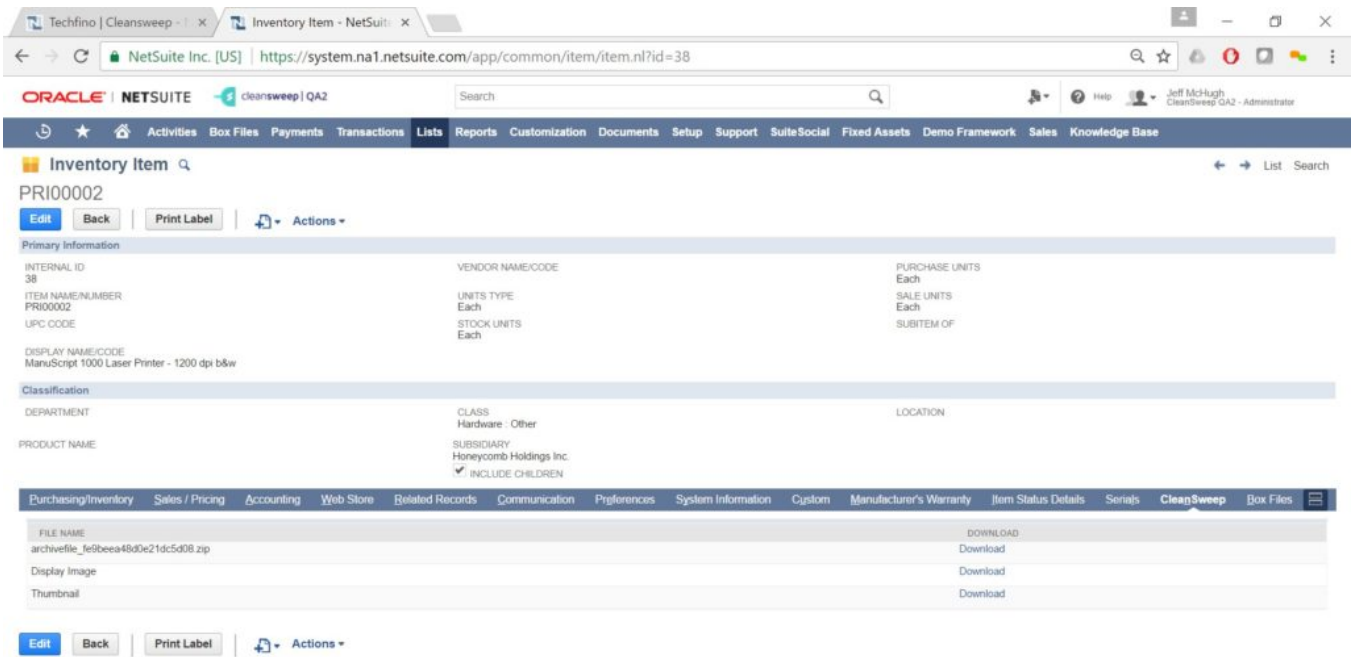
Once an archive has been run, the File Browser screen will show the folders and files structure of your archive. This file/folder layout will mimic exactly what the layout was in NetSuite, providing a seamless transition to your files stored in CleanSweep File Manager.



(<http://techfino.com/wp-content/uploads/2017/06/fig10.jpg>)

Fig. 10 – File Browser screen.

Selecting a file in the File Browser will launch a popup window with file metadata, and a button to download the file. Depending on your browser settings, the Download File button will either open the file in a new tab, or simply download it to your browser's default download folder. Please note that certain file types may not open and may issue a warning, depending on your browser's security settings.

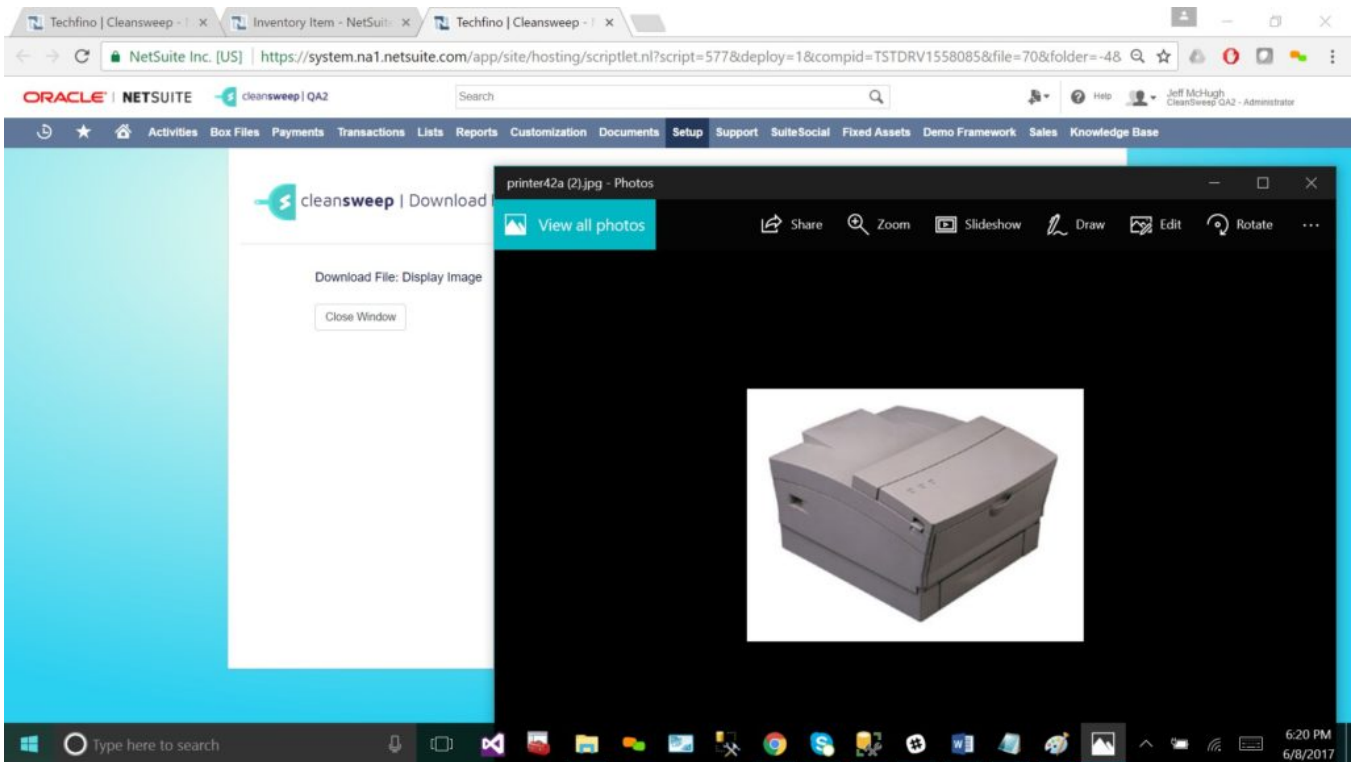


(<http://techfino.com/wp-content/uploads/2017/06/fig11.jpg>)

Fig. 11 – Inventory Item with CleanSweep Archived Files and the links to those files.

If a file attached to an entry in NetSuite was archived, a link to the CleanSweep archived version of the file appears. Choosing the “CleanSweep” menu will show the file names, and a download link to these files.

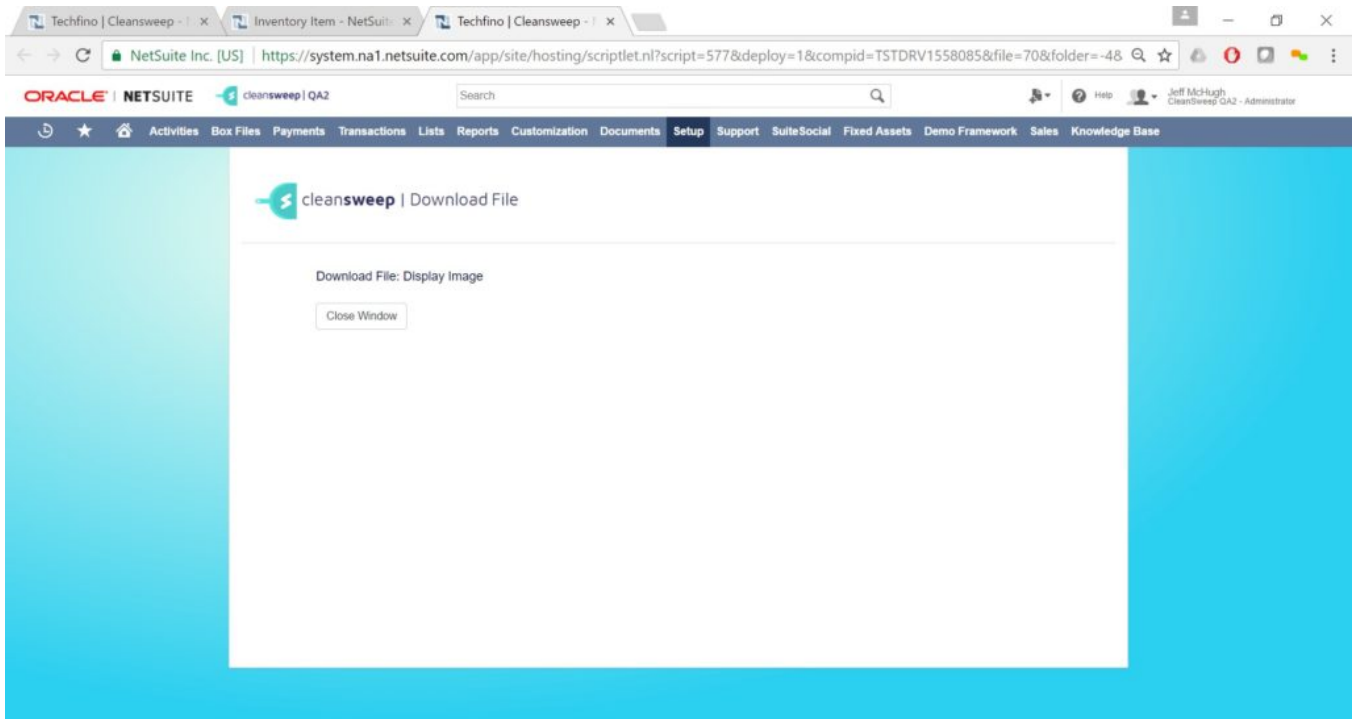
Clicking on the “Download” link will launch the archived version of the file.



(<http://techfino.com/wp-content/uploads/2017/06/fig12.jpg>)

Fig. 12 – Clicking on the download link will load the link from the secure CleanSweep Archive.

Clicking on the download link will load the file from the secure CleanSweep archive (see Fig. 12). The user is able to print, or locally save, that file. Upon closing the file, the user can close the browser window by clicking the “Close Window” button (see Fig. 13).



(<http://techfino.com/wp-content/uploads/2017/06/fig13.jpg>)

Fig. 13 – Clicking on the “Close Window” button will close the download window.

2. FAQ

- Is CleanSweep File Manager secure?
ANSWER: All CleanSweep File Manager passwords are encrypted at rest. All CleanSweep files are accessed securely. When the download file button is clicked, the system issues a secure link to the file with a signature that must be matched by the browser, or else access fails. This link only remains intact for a few minutes and is only viable for that browser on that machine
- If someone sees the URL of one of my files stored, can they simply type it in and access it?
ANSWER: All File Manager files are accessed securely. When the download file button is clicked, the system issues a secure link to the file with a signature that must be matched by the browser, or else access fails. This link only remains intact for a few minutes and it is only viable for that browser on that machine.
- How long does it take to archive the contents of my file cabinet?
ANSWER: The first archive can take up to several hours depending on the amount of data stored in your sandbox. Subsequent archive updates are much faster as only new or updated files since the previous day are updated.
- How often does the file purge and archive occur?
ANSWER: Archive runs once daily and you choose the day and time when the purge runs on the Setup screen. The archive runs at the same time as the purge. You can purge files once per day or once per week.
- Can I access my files outside of NetSuite?

ANSWER: No, you cannot currently access your files outside of NetSuite. This will change in a future version of CleanSweep File Manager.

- Does File Manager provide visibility of relative documents from a NS record as well, similar to how the NS File Cabinet shows related files on the Communication tab?

ANSWER: Yes, a CleanSweep tab is visible on all transactions and standard records to list the files stored in CleanSweep File Manager.