



<u>CS</u>DRIVE

S-Drive Admin Guide v2.7

Important Note

This admin guide contains advanced information about S-Drive installation and configuration. Refer to the S-Drive Developer Guide for customizing S-Drive with APIs and refer to S-Drive User Guide for more information on how to use S-Drive product.







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Quick Start

1. Installation

Go to "S-Drive Product Page" (https://sdriveapp.com). And click "Get S-Drive" button. Answer the questions, confirm the installation and click on "Install" button. After submitting your Salesforce.com password click Continue/Next until the UI asks you to choose security level. Click on "Grant access to all users" and click "Next" and click "Install". For detailed instructions refer to *S-Drive Installation section*.

Important Note: Upgrading pre-1.24 versions to S-Drive 2.5 requires manual migration steps. You need to contact S-Drive support to migrate your data to the latest version. If you have S-Drive 1.24 or 1.25, you can upgrade to 2.5 by following steps in S-Drive Installation section's "Upgrading S-Drive" section.

2. Displaying S-Drive Tab in Sales App

For Salesforce Classic, go to "Setup" -> "Personal Setup" -> "My Personal Information" -> "Change My Display". Click "Customize My Tabs" button. If you don't find the link, try "My Settings"-> "Display & Layout"-> "Customize My Tabs". Select "Sales" from the "Custom App" drop down box. Move "**S-Drive**" from "Available Tabs" box to "Selected Tabs". Click "Save".

For Salesforce Lightning, go to "App Launcher", there will be a new App Card for "S-Drive", select it. S-Drive App opens in lightning experience with 3 tabs, which are "Home", "S-Drive" for S-Drive folders and "S-Drive Configuration" tab for configuration settings.

3. Activating S-Drive

Click on "S-Drive" tab on Salesforce Classic. If it is not activated yet, page will be redirected to S-Drive Activation page. If Remote Site Settings are configured correctly, you need to complete "Step 2: Configure Amazon S3 Credentials", "Step 3: Configure Amazon S3 Bucket Name" and "Step 4: S-Drive Authorization" sections.

• For Step 2, you must have Amazon S3 Access Key and Secret Key information to use with S-Drive. For Step 4, you need to create a free S-Drive account and authorize S-Drive to connect your organization at <u>https://portal.sdriveapp.com</u>

For detailed instructions refer to "S-Drive Installation " section.

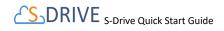
4. Configuring Out of the Box S-Drive Attachments

For **Salesforce Classic**, S-Drive comes with preconfigured Account, Case, Contact, Opportunity attachments as overridden. If you want to use S-Drive Attachments on these objects, you can easilyenable by following these steps:

- After installing and activating S-Drive, go to "Setup" -> "App Setup" -> "Customize" -> "Accounts" (or Cases, Contacts, Opportunities) -> "Button and Links"
- Click "Edit" next to the "View" label.
- Select "Override with" as "Visualforce Page" and select the correct bundled page (AccountFilePage for Accounts, CaseFilePage for Cases, ContactFilePage for Contacts, OpportunityFilePage for Opportunities) from the dropdown and click Save.
- You should see the Account (or Case, Contact, Opportunity) Files section in your individual object pages' bottom section.

For **Salesforce Lightning**, S-Drive comes with global S-Drive component that can be used for any type of objects (Account, Case, or Custom Objects). You can easily add S-Drive Lightning component to any record page by following steps:

- On the any objects record page, (for example Account)
 click settings menu button (¹⁰) on the top right. Select
 "Edit Page" option.
- On the left side, under "Lightning Components" section
 > Custom > there is "SDrive" lightning component.
 Drag and drop the component to the record page wherever you want.
- After component is added to record page on the right side, there will be attributes. Please fill these attributes correctly (Please check S-Drive Advanced User Guide to get detailed information).
 - Parent Object Name: Object name without prefix that own files (i.e. Account, MyCustomObject_c)
 - Object Namespace Prefix: If there is a prefix for parent object, you should put it here. (For Account it should be empty, for Custom object it





should get you org prefix. i.e. for "cg__MyCustomObject__c" it will be "cg__")

- File Object Name: Object name without prefix for files. (i.e. "AccountFile_c", "MyCustomObjectFile_c")
- File Object Namespace Prefix:
- If there is a prefix for parent object, you should put it here. (For Account it should be empty, for Custom object it should get you org prefix. i.e. for "cg_MyCustomObject_c" it will be "cg_")
- Relationship Field Name: For Standart objects it is "[ObjectName]__r" (i.e. Account__r, Case__r). For custom objects it is "Parent__r".
- Default Sort Field Name: It can be object files any sortable field name with prefix. By default, it is "cg__File_Name__c" assuming the usage of a managed package file object (please change this to "File_Name__c" if a custom file object is being used).
- "Save" the record page using Save button on top right, then "Activate as Org Default" by clicking "Activation..." button right of it.

5. Configuring Standard/Custom Object Attachment Upload Feature

S-Drive stores all file information as Salesforce.com records on objects that represent each file on Amazon storage. In order to store file information, you can either use the S-Drive provided file objects for the Case, Contact, Lead, Account and Opportunity objects (see above item) or you can create your own. For Salesforce Classic or Lightning there is no any distinction on Object Files.

Creating Custom Object Files

This section

- Go to "Setup" -> "App Setup" -> "Create" -> "Objects". And click
 "New Custom Object" button. Fill in the required fields to create
 a new custom object (for example, named as "My Example
 Object File"). For "Record Name" field, type "My Example
 Object File Number". Select "Auto Number" as "Data Type".
 Type in "A-{0000}" for "Display Format" and "1" for" Starting
 Number"
- Check if the "Deployment Status" is set to "Deployed". Then click "Save" button to create the custom object file
- After creating custom object, create fields for that object. So, to create fields to "My Example Object File" object, click on "Custom fields & Relationships" and create the following fields: (while creating, make sure that all fields are visible to all users):

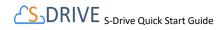
0	Content Type	Type = Text
		Length = 255
0	Description	Type = Text Area(Long)
		Length = 32,000
		Visible Lines = 3
0	File Name	Type = Text
		Length = 255
0	File Size in Bytes	Type = Number
		Length = 18
0	Parent	Type=Master-Detail Relationship
		Related to = My Example Object
0	Parent Folder Id	Type = Text
		Length = 255
0	File Size	Type = Formula
		Formula Return Type = Text

Copy and paste below code to "Simple Formula" field:

IF(File_Size_in_Bytes__c > 1024, IF(File_Size_in_Bytes__c > 1048576, IF(File_Size_in_Bytes__c > 1073741824, TEXT(ROUND((File_Size_in_Bytes__c /1073741824),2)) & "GB", TEXT(ROUND((File_Size_in_Bytes__c /1048576),2)) & "MB"), TEXT(ROUND((File_Size_in_Bytes__c /1024),2)) & "KB"), TEXT(File_Size_in_Bytes__c) & "bytes")

Click "Check Syntax" button to see if you have correctly typed the formula.

0	WIP	Type = Checkbox
		Default Value = Checked
0	Кеу	Type = Text
		Length = 255
0	Version Id	Type = Text
		Length = 255
0	Version Description	Type = Text
		Length = 255
0	Is Latest Version	Type = Checkbox
		Default Value = Checked
0	Preview Key	Type = Text
		Length = 255
0	Thumbnail Key	Type = Text
		Length = 255
0	Preview Version Id	Type = Text
		Length = 255
0	Thumbnail Version Id	Type = Text
		Length = 255
0	Private (This field is op	tional)
		Type = Checkbox
		Default Value = Unchecked



For more information, about usage/setting of this property see "S-Drive Advanced Configuration Guide" (page 25).

Creating Before Delete Trigger for Custom Object (Optional)

You can find detailed information about creating "before delete trigger" in "*S-Drive Advanced Configuration Guide*" (page 17).

Creating Custom Object Files Page For Salesforce Classic

In this step we'll create custom object file's Visualforce page. This page can be used to override the object's view or it also can be used as an inline section for the object's layout. At the end of this section, use cases for both scenarios will be displayed. To create an object file page, follow these steps:

 Go to "Setup" -> "App Setup" -> "Develop"-> "Pages" and click the "New" button at the top of the page. Create a page (For example "MyExample" page). And type following code inside the page (Note that this sample is for *override* option with chatter enabled and inline is set to "true" for this reason. For *inline* option you need to remove "*apex:detail*" tag):

```
<apex:page standardController="My_Example_Object__c"
tabStyle="My_Example_Object__c">
<apex:detail inlineEdit="true"
relatedList="true"
showChatter="true"/>
<cg:AttachmentComponent title="My Example Object Files"
inline="true"
customObjectName="My_Example_Object__c"
customObjectFileName="My_Example_Object__c"
objectId="{!My_Example_Object__c.ld}" />
</apex:page>
```

Remember that this is just an example. You need to set these component attributes based on your configuration. For more information about component attributes refer to "S-Drive Advanced Configuration Guide" (page 20)

 Now set the security for your page on other profiles. Go to "Setup" -> "App Setup" -> "Develop" -> "Pages" and click "Security" link next to your page name. Move all profiles (or select based on your needs) from "Available Profiles" to "Enabled Profiles". Now we have an object (or created our custom object), created our custom object file and custom object file page. At this point, we can override the custom object's view or we can use "S-Drive Attachments" as an inline section in the page layout:

Overriding the View of the Object

Go to "Setup" -> "App Setup" -> "Create"-> "Object" and click the label of your custom object. You'll see "Object Definition Detail" screen. Scroll down and find "Standard Buttons and Links" page block and click "Edit" action next to the "View" label. Then select Visualforce Page for *Override With* section and pick "MyExampleFilePage" (the custom page you created previously for this object) from the drop-down box. Click "Save" button to complete the override. After creating a test object, you should see "My Example Object Files" page block at the end of the object detail page. See "*S-Drive User Guide*" for more information on how to use the buttons and functions in this page block.

Using as Inline Attachment

To use S-Drive Attachments as inline, we need to set "inline" property to "true". That is, in the example page we have created above, *inline = "true"* must be included to use S-Drive Attachments as inline.

Go to "Setup" -> "App Setup" -> "Create"-> "Object" and click the label of your custom object. You'll see "Object Definition Detail" screen. Scroll down and find "Page Layouts" page block and click "Edit" action next to the main layout of the object. Click "Fields" and drag-drop a Section to an appropriate place in the layout.

After dropping the "Section", you'll see the properties screen for the dropped "Section". Type in a section name and select if you want to display section header on detail page and edit page. Also select "1-column" for the layout. Then click "OK" button. You can customize these settings based on your layout needs.

Now, go to Visualforce Pages from the top. Select the "Custom page name" you created (e.g. TestPage) and drag it into the section that you created previously. After dropping the page into the section, click the properties icon for the page on the top-right corner of the page in the section. Keep "Width (in pixels or %)" as "100%", set "Height (in pixels)" to "500". And check "Show scrollbars" option. Click OK button. We are done with the configuration. Save the layout by clicking the "Save" button on the left-top corner of the screen.

Now if you go to your object's tab, you'll see the S-Drive Attachments inline in the page layout.

Tip: You can use "Inline Visualforce Expander" tool from AppExchange to display S-Drive Attachments height dynamically. Refer to the "*S-Drive Advanced Configuration Guide*" page 31 for more information.

Adding S-Drive Lightning component to Custom Object Files Record Page For Salesforce Lightning

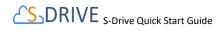
• On the custom objects record page click settings menu

button (🍄) on the top right. Select "Edit Page" option.

On the left side, under "Lightning Components" section
 > Custom > there is "SDrive" lightning component.

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Drag and drop the component to the record page wherever you want.

- After component is added to record page on the right side, there will be attributes. Please fill these attributes correctly (Please check S-Drive Advanced User Guide to get detailed information).
 - Parent Object Name: Object name without prefix that own files (i.e. MyCustomObject__c)
 - Object Namespace Prefix: If there is a prefix for parent object, you should put it here. (i.e. for "cg_MyCustomObject_c" it will be "cg_")
 - File Object Name: Object name without prefix for files. (i.e. "MyCustomObjectFile_c")
 - File Object Namespace Prefix: If there is a prefix for the object, you should put it here. (i.e. for "cg__MyCustomObject__c" it will be "cg_")Relationship Field Name: For custom objects it is "Parent__r".
 - Default Sort Field Name: It can be object files any sortable field name with prefix. By default, it is "cg__File_Name_c" (i.e. "CreateDate", "cg__File_Type_c").
- "Save" the record page using Save button on top right,
 then "Activate as Org Default" by clicking
 "Activation..." button right of it.

6. Allowing Customer Portal Users to Upload Case Files from Customer Portal

Go to "Setup" -> "App Setup" -> "Create" -> "Objects". Click "Edit" next to the "Case File" object. Scroll down to the "Optional Features" in "Edit" page. Check "Available for Customer Portal" and click "Save".

Go to "Setup" -> "Administration Setup" -> "Manage Users" -> "Profiles" and click "Edit" next to your currently installed "Customer Portal Manager" installation. Note that selected profile must be a cloned profile to make changes on it.

Scroll to the "Custom Object Permissions" section. Give Read, Create, Edit and Delete access to the "Case Files" custom object by checking the appropriate checkboxes, then click "Save".

(Optional) To Remove Submit & Add Attachments button from new case creation screen, look at the "*S-Drive Advanced Configuration* section.

7. S-Drive Configuration

Organization administrators can use S-Drive Configuration to set organization-wide configurations and get information about S-

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Drive credentials, usage and billing. There is no any distinction between Salesforce Classic & Salesforce Lightning. Using S-Drive Configuration, it is possible to:

- Enable/Disable Download Manager
- Enable/Disable Checksum Verification
- Enable/Disable Copy URL and Email features in S-Drive Tab
- Embed Thread Id in Case Emails
- Specify Restricted Portal User Profiles
- Specify Case Email Reply-To Address
- Specify Custom Email Footer
- Specify Max File Size in MBs
- Specify Default Email Expiration Time
- Change Default Upload Manager
- Allow users with "Modify All" permissions to create items at the top level and disallow other users
- Change field display settings of S-Drive Attachment objects
- Configure File/Attachment Sync.
- Update Amazon Information
- Enable Versioning
- Update S-Drive Objects
- Enable Amazon S3 Transfer Acceleration
- Configure Preview and Thumbnail

You can refer to "S-Drive Advanced Configuration Guide" (page 35) for detailed information.

8. File/Attachment Sync

You can configure Salesforce Files/Attachments to be synced with S-Drive. Once you add a file/attachment to any configured object, file/attachment will be synced to S-Drive.

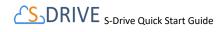
You can refer to "S-Drive Advanced Configuration section for detailed information.

9. S-Drive Reports

You can create "File Activity" reports for the S-Drive files. For Accounts, Cases, Contacts, Opportunities and S3Objects reports are enabled by default. For other standard/custom object files you need to create a lookup relationship under File Activity object:

- Go to "Setup" -> "App Setup" -> "Create" -> "Objects" and click the "File Activity" object name. Scroll to the "Custom Fields & Relationships" for the object and click "New" button. Choose the field type" screen, select "Lookup Relationship" and click "Next" button.
- Choose the related object screen, select "Related To" from the drop-down as your object file (e.g. My Example Object File) and click "Next" button. Keep default values for other steps and click "Save" button.

S-Drive Reports tracks following activities:





- S-Drive OneClick Download
- S-Drive CopyUrl Download
- S-Drive Zip and Download
- S-Drive Email Sent.

To create S-Drive Reports, follow these steps:

- Click "Reports" tab and then click "New Report..." button.
- Select "Other Types" from "Select Report Type" screen and find the correct File Activity for your object (e.g. 'File Activities with Account File' for 'Accounts') and click "Create" button.
- "Activity Type" and "Additional Details" fields are important for S-Drive Reports. Arrange fields for report and run/save report based on your needs.

For more information about S-Drive Reports, refer to "S-Drive Advanced Configuration section.

Sharing Rules and Permissions

For both Salesforce Classic & Lightning, "S-Drive Attachments" support all sharing rules similar to related objects. "S-Drive Folders" support manual sharing and it is also sharing-aware.

For more information about Sharing Rules, refer to *S-Drive* Advanced Configuration section.

You can apply object-based sharing via manual sharing. Profile based permissions are also supported on custom object files. S-Drive supports four different access levels:

- None
- Read
- Read + Create + Edit
- Read + Create + Edit + Delete

To set these profiles based on permissions go to "Setup" -> "Administration Setup" -> "Manage Users" -> "Profiles" menu. Click on the "Edit" link next to the name of the profile you want to edit. Note that you cannot change the standard profiles' permissions. You may need to clone them before you can edit. Inside the "Edit" screen of the selected profile, scroll down to the "Custom Object Permissions" section. You'll see the "Basic Access" selections for your custom object files. You will need to check/uncheck these boxes based on your needs.

For more information and examples about S-Drive Permissions refer to S-Drive Advanced Configuration section.





1. INTRODUCTION

Welcome to S-Drive!

1.1 Layout of this Guide

This INTRODUCTION section explains the various pieces of S-Drive.

In GETTING SET UP, we will talk about setting up the accounts you need as prerequisites to using S-Drive.

INSTALLING S-DRIVE tells you how to find S-Drive from the AppExchange.

ACTIVATING S-DRIVE walks you through setting up your AWS access and bucket, and connecting your Salesforce org though our portal.

S-DRIVE FILE AREA ON ACCOUNTS, CASES, CONTACTS, OPPORTUNITIES, LEADS shows you how to add the S-Drive file area to standard object pages so you can begin uploading and accessing files. **At this point, you are ready to use S-Drive.**

DISPLAYING "S-Drive" AND "S-Drive Configuration" TABS helps you set up these tabs for easy access.

S-DRIVE ADVANCED CONFIGURATION explains how to create an S-Drive File Object for a standard or custom object other than Accounts, Cases, etc.

S-DRIVE CONFIGURATION TAB walks you through all the things an admin can configure for the organization.

ADVANCED FEATURES gives a quick overview of S-Drive's features beyond simply uploading and accessing files. More information can be found in the User's Guide.

PROFILE PERMISSIONS, OWD, AND SHARING RULES talks about how S-Drive works with Salesforce's sharing settings and profile permissions.

S-DRIVE IN SALESFORCE.COM COMMUNITIES explains how to add S-Drive to your community.

S-DRIVE SALESFORCE MOBILE APP CONFIGURATION AND USER GUIDE shows you how to set up S-Drive for Mobile.

Appendix A: S-DRIVE PORTAL gives more detail on the S-Drive portal account, including information about billing.

Appendix B: Upgrading S-Drive is where to go if you're upgrading from an earlier version of S-Drive.



Appendix C: Troubleshooting has some troubleshooting tips.

1.2 AWS and S-Drive Portal

S-Drive provides unlimited, cost-effective file storage using Amazon S3 on Amazon Web Services (AWS). Your files are stored in the cloud and accessible in Salesforce through an easy to use interface. Salesforce organizations are connected to AWS through an S-Drive portal account. This account is also where you'll be billed for your storage use. In order to use S-Drive, you'll need an AWS account and an S-Drive Portal account. See Section 2 GETTING SET UP for more information.

1.3 S-Drive Tab

With S-Drive, you can upload files to any standard or custom object record. In addition, there is an "S-Drive Tab" where you can store files that aren't related to any specific object. This can be used for company-wide documents for example. Files on the S-Drive Tab (not associated with a standard or custom object) are stored in an object called S3Object.

1.4 S-Drive File Objects

Each custom or standard object that you want to use S-Drive with has a corresponding S-Drive File Object where the information about the files is stored. This is a custom object that has a master-detail relationship with the object the files are associated with. For example, Accounts has an associated object called AccountFiles. For Accounts, Cases, Contacts, Opportunities and Leads objects, S-Drive File Objects have already been provided as part of the S-Drive package. For other standard objects, or for your own custom objects, you can create the associated S-Drive file object through the S-Drive Configuration tab. These objects should have permissions enabled in the profiles of users using them.

1.5 **Other S-Drive Objects**

In addition to the S-Drive objects that hold file information, there are other S-Drive objects that relate to various features of S-Drive. These objects should have permissions enabled in the profiles of users using S-Drive.

- AttachmentSyncs
- File Activities
- MyS3Objects
- Previews
- S3Configs
- S3Objects
- SDriveCustomActions
- SQueues
- SURLS





SURL Hits

2 GETTING SET UP

Welcome to S-Drive! S-Drive uses Amazon Web Services (AWS) to store files, and an S-Drive portal account to track usage and billing. Let's get those set up first.

2.1 Create an Amazon Web Services Account

To set up an AWS account, go to https://aws.amazon.com/ or directly to

Note: It's very important to keep track of the login credentials for this account and to make sure they are not lost if the person who created them leaves the organization. They will be needed at times in the future when it may be necessary to update or change your bucket.

https://portal.aws.amazon.com/billing/signup#/start to create an account.

You will create a bucket later on when you configure S-Drive. There is no need to create a bucket directly in AWS and we recommend against it.

2.1.1 Access Key and Secret Key

When creating your account, you will be given an **Access Key** and **Secret Key**, which you will need later in order to activate S-Drive. If you need to find these keys again, you can go to <u>https://aws.amazon.com/</u> and go to Security Credentials.









2.1.2. Identity and Access Management (IAM) Policies and Minimum Policy Example

See <u>What is IAM</u> for information about how to control access to your AWS resources. This is not needed for most S-Drive customers.

To apply a policy to your restricted user:

- 1. Sign in to <u>AWS Management Console</u> and click "IAM" from Services menu.
- 2. Click "Policies" on the dashboard and then click "Create Policy" button.
- 3. Select "Create Your Own Policy" on the screen.
- 4. Type name into "Policy Name" area. Copy contents of the below example and paste into "Policy Document" area on AWS Console. Update *sdrivebucket* bucket name references in policy document and click "Create Policy". The purpose of this policy is to give proper access to your own Salesforce instance to be able to upload/ download files.



```
"Version": "2012-10-17",
    "Statement": [
        {
            "Effect": "Allow",
            "Action": [
                "s3:*"
            ],
            "Resource": [
                "arn:aws:s3:::sdrivebucket/*"
            ]
        },
        {
            "Effect": "Allow",
            "Action": [
                "s3:ListAllMyBuckets"
            1,
            "Resource": [
                "arn:aws:s3:::*"
            ]
        },
        {
            "Effect": "Allow",
            "Action": [
                "s3:PutBucketCORS"
            ],
            "Resource": [
                "arn:aws:s3:::sdrivebucket"
            ]
        },
        {
            "Effect": "Allow",
            "Action": [
                "s3:GetBucketLocation"
            1.
            "Resource": [
                "arn:aws:s3:::sdrivebucket"
            1
       }
   ]
}
```

5. Click "Users" on the dashboard and click on your user name. Then Click "Attach Policy" button on the screen for the user that you use in S-Drive.

Find the policy which you created in #4 and click "Attach Policy" button.

2.2 Create an S-Drive Portal Account

In order to use S-Drive, you need an account on S-Drive portal. Here you will be able to see your Amazon account and payment details. Go <u>https://portal.sdriveapp.com</u>. Register for a free account, or login if you already have an account.





For more information about your Portal account, including how to register a payment method, see payment details, download invoices, connect or reconnect to organizations, change your password and more, see Appendix A: S-DRIVE PORTAL.

3 INSTALLING S-DRIVE

<u>NOTE:</u> If you are upgrading S-Drive from a previous version, see Appendix B: Upgrading S-Drive. Otherwise continue below.

Go to S-Drive Website (sdriveapp.com). Click "Get S-Drive" button

(Figure 3-1). The **S-Drive Product Page** on the AppExchange will be opened. Click **"Get It Now".** Follow the directions to install S-Drive in your sandbox or production org.



Figure 3-1





4 ACTIVATING S-DRIVE

After completing installation, go to S-Drive Configuration in your Salesforce instance:

- In Classic, click on the "+" and click on S-Drive Configuration
- In Lightning, click on the **"App Launcher"** (**!!!**) menu which is on the left corner of the Salesforce page.
 - Then click on "S-Drive: Simple Secure Storage for Salesforce Users" app.

App Launcher		Q Find an app or item		Visit AppExch	nange
 All Apps 					
	ustomer service Ints, cont More	Marketing Best-in-class on-demand marketing automation	Community Salesforce CRM Communities	Salesforce Chatter The Salesforce Chatter so network, incl More	cial
Content Salesforce	CRM Content	Sales Console (Lighthing Experience) Lets sales reps work More	Constant Service Console (Lightning Experience) Lets support agents More	Sales Manage your sales proces with accounts, Ie More	<u>55</u>
S-Drive Simple Se Salesforce	cure Storage for Users.				
 All Items 					
ccounts	App Launcher	Approval Requests	Assets	Calendar	
ampaigns	Cases	Chatter	Contacts	Contracts	
ashboards	Duplicate Record Sets	Files	Forecasts	Groups	

Figure 4-1





• Click on S-Drive Configuration

The S-Drive Configuration tab will take you to a list of instructions as follows:

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Step 1: Configure Remote Sites: If Remote Site Settings are configured correctly, you'll see **"Your remote site settings are configured correctly"** message under the **"Step 1: Configure Remote Sites"** section (Figure 4-3). If you see an error message in Step 1, resolve the issue by following the on-screen instructions.

Get Started				
	1	Valaama t		
	V	Velcome to		
		Thank you for ins	stalling S-Drive	
		Continue Con	figuration	
			5	
Step 1: Confi	igure Remote Sites			
		Your remote site settings are c	onfigured correctly.	
		Eiguro 4 2		
		Figure 4-3		

Step 2: Configure Amazon S3 Credentials: This step is required to connect your Amazon S3 account with S-Drive. You need to enter a valid "Amazon Secret Key" and "Access Key". After providing keys. If you see "Amazon S3 Credentials are configured correctly," continue with "Step 3: Configure Amazon S3 Bucket Name".





Access Key	
Secret Key	parameter and a second s
Step 3: Configure Amazon S3 Bucket Nar	me
Use existing bucket	
Create a new bucket (requires create bucket permission)	
Bucket Name	alperensaylar-test •
	Configure Amazon 53 Bucket Name
Step 4: S-Drive Authorization	
In order to start using S-Drive you need to c	reate a free S-Drive account and authorize S-Drive to access your Salesforce organization on https://portal.sdriveapp.com
Please check S-Drive Portal Guide on the fo	ollowing page Support Documentation
	Figure 4-4

Important Note: IAM users whom assigned individual security credentials, must have some permissions to activate and use S-Drive. The minimum policy example can be seen in section 2.1.2 Identity and Access Management (IAM) Policies and Minimum Policy Example. Please apply this policy if you are planning to use this kind of user for the activation.

Step 3: Configure Amazon S3 Bucket Name: This is the bucket that will be used to store your files in your Amazon S3 account. Bucket name must be unique and must comply with DNS naming conventions. Bucket names cannot have capital letters or underscores. You can select "Use existing bucket" or "Create a new bucket" option. (Figure 4-4) We recommend creating your bucket here in the S-Drive Configuration, rather than directly in AWS.

If you select "*Create a new bucket*" option you need to provide a valid bucket name and select the region name to create the bucket on this endpoint location.

Your bucket access settings will be public by default when it is created. After it is created and you have finished the configuration process, there will be a button on the S-Drive configuration page under Authentication Settings called "**Block Bucket Public Access**" on the configuration page. Simply click the button to make your bucket private. This is recommended.





If you select **"Use existing bucket"** option you must select one of the bucket names from the list (that is retrieved from your Amazon S3 account).

Important Note: If you are planning to use **S-Drive Versioning** feature, we strongly suggest you use a **"versioning never enabled bucket"**. To ensure versioning status of your bucket, sign in to your amazon console, find your bucket from S3 service and check bucket properties. If you selected **"Create a new bucket "** option, you can ignore this note as it will create a "versioning not enabled" bucket by default.

Click "*Configure Amazon S3 Bucket Name*" button). If you see "Amazon S3 Bucket Name is configured correctly" message continue with "Step 4: S-Drive Authorization".

	Access Key AKIA	IK4ZZKW2ITJ7RGFQ		
	Secret Key	*********************		
tep 3: Config	jure Amazon S3 Bucket Name			
Use existing but				
Create a new b	ucket (requires create bucket permission)			
	Bucket Name alper	rensaylar-test		
		Configure Amazon S3 Bucket N	lame	
Step 4: S-Driv	e Authorization			
n order to star	t using S-Drive you need to creat	te a free S-Drive account and authorize S-Driv wing page Support Documentation	ve to access your Salesforce organization on h	https://portal.sdriveapp.com
Please check a	S-Drive Portal Guide on the follow	ang page <u>Support Documentation</u>		



• Step 4: S-Drive Authorization: You need to go to *portal.sdriveapp.com* to complete this step. Go to *portal.sdriveapp.com* and login into the S-Drive portal account you created earlier. Authorize S-Drive to connect to your organization:





 Click Connected Organizations link on the menu (Figure 4-6). Then under "Connect Salesforce.com Organizations", click either "Production Instance" or "Sandbox Instance" based on where you installed S-Drive (Figure 4-7). This redirects the salesforce.com login page. Login, and you'll see your organization on the list of "Connected Salesforce.com Organizations."

	RIVE	Billing	Connected Or	ganizations F	Payment Method			Account	Logout
					Figure 4-6				
Connect Salesfor	ce.com C	rganizati	on						
Production Instance	Sandb	ox Instance							
Connected Sales	force.con	n Organiz	ations						
Action		Organiza	tionId	Туре	User Name	Date Created	Date Updated	Organization Status	s
Reconnect Del	lete	00DA000	00000000001	PRODUCTION	N user@cyangate.com	10/27/2014 <mark>1</mark> 1:18	11/14/2014 15:43	CONNECTED	
		0006000	0000000000		l avangata@avangata.com	10/04/0014 14:59	10/07/0017 17-50	CONNECTED	
					Figure 4-7				

Congratulations! You are now ready to configure S-Drive to suit your needs.

5 S-DRIVE FILE AREA ON ACCOUNTS, CASES, CONTACTS, OPPORTUNITIES, LEADS

In order to start using S-Drive for Accounts, Cases, Contacts, Opportunities, and Leads, you need to have an area on the page to work with S-Drive files. The next section shows you how to set this up for Classic. Or skip to S-Drive File Area for Lightning (Accounts, Cases, Contacts, Opportunities, Leads) for Lightning.

5.1 S-Drive File Area for Classic (Accounts, Cases, Contacts, Opportunities, Leads)

For Account, Case, Contact, Opportunity and **Lead** standard objects, the associated S-Drive file objects and override pages for Salesforce Classic are bundled with the S-Drive installation. If you'll use S-Drive attachments for these standard objects as *override*, you can use bundled objects and/or pages where appropriate. If you are planning to use S-Drive Attachments for other standard/custom objects or as *override/inline*, please refer to the "*S-Drive Advanced Configuration Guide*" document.

"Overriding the view of the object" means that the page will be used as an override to the standard object page. In this case, 'S-Drive Attachments' will be a section at the end of the standard page layout.

In Salesforce Classic view, click Setup button on right top and go to Build-> Customize ->
Accounts (or Cases or Contacts or Opportunities or Leads- the label of the object that you
want to enable S-Drive Attachments for) -> Buttons, Links, and Actions. (Figure 5-1).

In Lightning view, you can click Setup icon (²²) on right top and go to **Object Manager**->Accounts or Cases or Contacts or Opportunities or Leads -> Buttons, Links, and Actions.

It's Better	III LIB							
	ing Experi	ence and give your users	a productivity boost.	heck Readiness				
unt 0 Q	Buttons, Lini	ks, and Actions						Help for this P
Expand All Collapse Al								
nister		ge to manage buttons, links, and action	s. New Action New Button or Link Default Custom Links					
a.com Administration		Links, and Actions						Links, and Actions Hel
Clean	Action	Label Accounts Tab	Name Tab	Description	Туре	Content Source Standard page	loon	Overridden
Clean Info Account Fields	Edit							
Account Platus	Edit	Add to Call List Add to Campaion	CreateCallList AccountAddToCampaign			Standard page Standard page		
	Edit Edit Del	Add to Campaign Billing	Billing		Detail Page Link	URL URL		
	Edit	Check for New Data	XClean		Detail Page Link	Standard page		
lomize	Edit	Clean	ListClean			Standard page		
oads	Edit	Delete	Delete			Standard page		
Linkedin Accounts ccounts	Edit	Discover Companies	DiscoveryGetAccountsAction			Standard page		
Fields	Edit	Edit	Edit			Standard page		
Related Lookup Filters	Edit	Get More Accounts	DeteDotComGetAccountsMultiAddAction			Standard page		
Validation Rules	Edit	List	List			Standard page		
Triggers Partner Roles	Edit	New	New			Standard page		
Contact Roles on	Edit	View	View			Standard page		
Accounts Page Layouts	Edit	View Account Hierarchy	AccountHierarchy			Standard page		

Figure 5-1

Click the Edit action next to the View label (Figure 5-2).





Buttons, Links, and Actions				New Action New Button or Link Default Custom Links			
Action	Label	Name	Description	Туре			
Edit	Accounts Tab	Tab					
Edit Del	Billing	Billing		Detail Page Link			
Edit	Delete	Delete					
Edit	Edit	Edit					
Edit	List	List					
Edit	New	New					
Edit	View 🗡	View					

- Figure 5-2
- Then select Visualforce Page for Override With section and pick related Visualforce page (AccountFilePage for Accounts, CaseFilePage for Cases, ContactFilePage for Contacts, OpportunityFilePage for Opportunities, LeadFilePage for Leads) from the drop-down box. Click Save button to complete the override (Figure 5-3).

Override Properties	Seve Cancel
	1
Label	View
Name	View
Default	Standard page
Salesforce Classic Override	No override (use default)
	Wisuafforce pageNone
Lightning Experience Override	Uptring comport
	Use the Saleston AccountFilePage (og_AccountFilePage) MobileAccountFilePage (og_MobileAccountFilePage)
Mobile Override	Mobile-Accountiner-ge (cgwoldie-Accountiner-age)
	Use the Salesforce Classic override
Comment	
	Save Cancel

Figure 5-3

3. Now it will display View as Overridden in the Buttons, Links, and Actions section (Figure 5-4).

Buttons, L	Links, and Actions		New Ac	tion New Button or Link Default Custom	n Links		Buttons, Links, and Actions Help
Action	Label	Name	Description	Туре	Content Source	lcon	Overridden
Edit	Accounts Tab	Tab			Standard Salesforce.com Page		
Edit Del	Billing	Billing		Detail Page Link	URL		
Edit	Delete	Delete			Standard Salesforce.com Page		
Edit	Edit	Edit			Standard Salesforce.com Page		
Edit	List	List			Standard Salesforce.com Page		
Edit	New	New		×	Standard Salesforce.com Page		
Edit	View	View			AccountFilePage (Visualforce Page)		



4. After creating an account object, you should see "Account Files" (similar screens for Cases, Contacts and Opportunities and Leads once you configure) page block at the end of the object detail page (Figure 5-5). See "S-Drive User Guide" for more information on how to use the buttons and functions in this page block.





Account Files	Recycle Bin New Folder Upload Download Attach from S-Drive Folders Email Delete Cut Copy Paste	
Home	Search	Q
1 No records to display		

Figure 5-5





5.2 S-Drive File Area for Lightning (Accounts, Cases, Contacts, Opportunities, Leads)

To display the S-Drive file area on Lightning pages for Account, Case, Contact, Opportunity and Lead standard objects, you need to edit each of these objects' pages. We'll use the Account object as an example, but the process is the same for Case, Contact, Opportunity, and Lead.

 To edit the Lightning page for a standard object, first choose a record for that object. For Accounts, if you don't already have an Account record, you'll need to create one (App Launcher -> Accounts > New). If you already have an Account, you need to open that account's record page by clicking on its name.

F	Accounts Recently Viewed 🔻			Ne	w Import
3 item	s • Updated a few seconds ago			\$\$• Ⅲ• C'	/ 0 T
	ACCOUNT NAME	✓ ACCOUNT SITE	V PHONE	✓ ACCOUNT OWNER ALIAS	~
1	Goat Wranglers R Us			YDoga	•
2	Smith Enterprises			YDoga	-
3	Burlington Textiles Corp of America		(336) 222-7000	YDoga	•

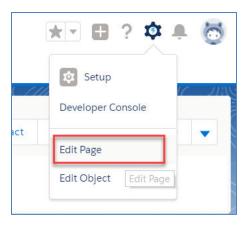


2. After clicking on the account in this page (Figure 5-6), which is "Smith Enterprises" in this

example, Smith Enterprises' page will be opened. You need to click on the **"Setup"** icon (^(C)) on the top right corner and choose **"Edit Page"** option. If you haven't used Lightning Experience at all, click on "Create Lightning Page" instead of "Edit Page".





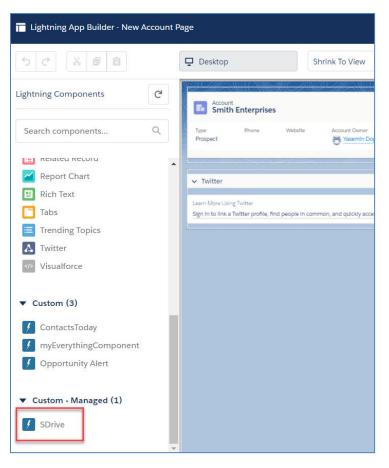




 After clicking on "Edit Page" or "Create Lightning Page" "Lightning App Builder – New Account Page" screen will be shown. You will see "Lightning Components" section on the left-hand side. You need to scroll down to see the "SDrive" component, under "Custom".









Grab the SDrive component and drag it to the right side where you see the components of the account page. Drop wherever you want the S-Drive component to be placed. <u>Note:</u> if you do not see the S-Drive component, you need to implement My Domain on your Salesforce Org. My Domain is required to use this and other Salesforce features. See <u>Salesforce Help: My Domain</u> for more information.



S_DRIVE

2 ぐ ※ 単 自	🖵 Desktop Shrink To View 💌 🥂 Refresh	Save Activ
thtning Components	Account Smith Enterprises	4+ Fotow New Contact. Yee Care New Note V
Search components Q,	Type Phone Website Account Owner Account Site Industry Prospect Phone Account Site Energy	Label
E Related Record		New Account Page
Report Chart	✓ Twitter	RELATED DETAILS ACTIVITY *Developer Name
Tabs	sign in to link a rwitter prome, this people in common, and quicky access recent tweets.	Sign in with Tentse New Task Log a Call New Event Email
Trending Topics	SDrive	Page Type
Visualforce	and the second se	Courte a tax And Activity Timeline V C Equent Al
Custom (3)	and the second se	Next Steps Mine Steps Object
f ContactsToday	1	No next steps. To get things moving, add a task or set up a meeting. Past Activity
myEverythingComponent Opportunity Alert		No pest activity. Past meetings and tasis manual as done show up New Man Test Anthr.
		Header and Right Sidebar
Custom - Managor (1)		Description

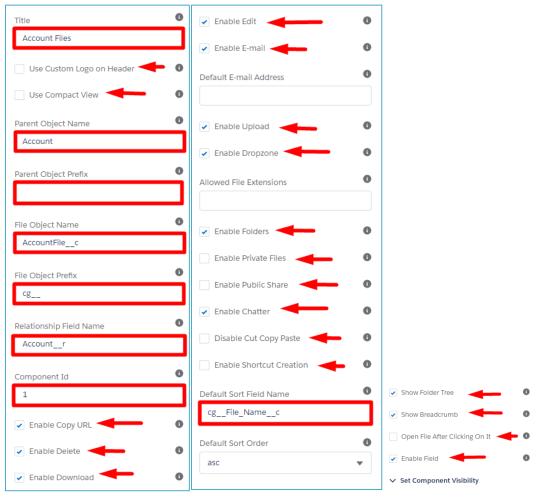


- 5. Edit the following required fields correctly to create the S-Drive area for Account Files (or Contacts, Cases, Opportunities, Leads) (Figure 5-10). You can also change the settings for a selection of checkboxes which include: Enable copy URL, Enable delete, Enable download, Enable edit, Enable e-mail, Enable upload, Enable folders, Enable private files, Enable Chatter, Disable Cut Copy Paste. You can scroll down to see more settings for the S-Drive Lightning component, such as showing folder tree component and breadcrumbs, which can be changed by using the toolbar menu afterwards.
- 6. After clicking on "Save" button, you need to activate the page in order to use the S-Drive component. You can click on "Activation" and choose "Assign as Org Default" or "Assign as App Default" from the pop-up screen, in order to view the S-Drive component. Now, you



should see "Account Files" page block at the end of the account object record page.

yanGat





The component attributes shown in Figure 5-10 are discussed in this section in detail:

1. Title

This is the title of the page block inside the object page. You can set it to "Account Files" (or Case Files, Contact Files, etc.) This field is optional and if you don't provide a value for this field, it will be set to "S-Drive Files".

2. Use Custom Logo on Header

Checking this box will enable inserting a custom logo. In order to enable this checkbox, add your logo image to Static Resource with the name 'SCustomLogo' first. Note that Static Resource should be public.





3. Use Compact View

Checking this box will enable a compact view of S-Drive which will help users to fit S-Drive into narrow spaces. In compact view, toolbar operations will be limited to the following: navigate to Home, upload files, download files and folders, create folders, navigate to recycle bin.

4. Parent object name

This is the name of the object that the files will be attached to. For Account object, it will be "Account". For the other standard objects use Case, Contact, Opportunity or Lead.

5. Parent object prefix

This is the object's namespace prefix that your Salesforce.com organization uses. For Account and other standard objects, you do not need to add an object namespace prefix so leave this field blank.

6. File object name

This is the name of the custom object S-Drive uses to hold the information regarding the attached files. S-Drive comes with the custom File object associated with Account, Case, Contact, Opportunity, and Lead. The object name is "AccountFile__c" (CaseFile__c, ContactFile__c, OpportunityFile__c, or Lead_File__c)

7. File object prefix

This is the file object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you created this custom object file inside this organization, your file namespace prefix is the same as your organization namespace prefix. If this file object belongs to a managed package, you need to use that managed package's namespace prefix. For Account, Case, Contact, Opportunity, or Lead set it to "cg_".

8. Relationship field name

Master-detail relation used for selected standard object. You need to fill it in as "Account_r" (Case_r, Contact_r, Opportunity_r, Lead_r)

9. Component Id

If multiple S-Drive components are used in a page, this attribute should be set to a unique key for each component. For example: '1', 'a', etc.



10. Enable copy URL

This option is used to enable/disable "Copy URL" link in the page. If the checkbox is checked, you will be able to see the "Copy URL" link for each asset. The default value for this checkbox is checked.

11. Enable delete

This option is used to enable/disable "Delete" option for all attachments in the page. If the checkbox is checked, you will be able to see the "Delete" link for each asset. The default value for this checkbox is checked.

12. Enable download

This option is used to enable/disable "Download" option for all attachments in the page. If the checkbox is checked, you will be able to see the "Download" link for each asset. The default value for this checkbox is checked.

13. Enable edit

This option is used to enable/disable "Edit" option for all attachments in the page. If the checkbox is checked, you will be able to see the "Edit" link for each asset. The default value for this checkbox is checked.

14. Enable e-mail

This option is used to enable/disable "E-Mail" option for all attachments in the page. If the checkbox is checked, you will be able to see the "E-Mail" link for each asset. The default value for this checkbox is checked.

15. Default email address

You can use this option, if you want to set a default "Additional To" email address for sending emails from your S-Drive Attachments. For example, if you select an Account S-Drive Attachment for an account and click "Email" button, "Email Files" screen will be opened and "Additional To" field will be filled with the email address you have provided here.

16. Enable upload

This option is used to enable/disable "Upload" option for all attachments in the page. If the checkbox is checked, you will be able to see the "Upload File(s)" link for each asset. The default value for this checkbox is checked.





17. Enable Drop Zone

This option is used to configure drop zone in S-Drive components. Select/deselect the checkbox to enable or disable the drop zone.

18. Allowed file extensions

You can use this option if you want to limit the file types to be uploaded into selected object's S-Drive attachments. Semicolon separated list of file extensions that are allowed to be uploaded can be written here. This attribute is optional and leaving this empty will allow all kind of files to be uploaded. For example, "*.jpg, *.txt" will limit the files to be uploaded to jpg and txt files.

19. Enable folders

This option is used to enable/disable folder support for S-Drive attachments in the page. If the checkbox is checked, you will be able to see the "New Folder" button. The default value for this checkbox is checked. If the box is not checked, the "New Folder" button will be removed from the toolbar section.

20. Enable private files

This option is used for enabling public/private file access to the S-Drive attachments and commonly used to limit the customer portal users' access to individual files. The ability for users to configure this is determined by the main configuration settings in S-Drive Configuration Tab. If the checkbox is checked, you will see the public/private flag. Set this attribute to true by checking the checkbox, if you want to enable private/public flag. Setting the private flag on a file hides the file from customer portal users. The default value for this checkbox is unchecked.

21. Enable Public Share

This option is used to configure public share in S-Drive components. Select the checkbox to see Public Share option in Actions Menu. Deselect the checkbox to disable Public Share in Actions Menu.

22. Enable Chatter

This option is used for enabling/disabling Chatter for Account files. If you enable this option, you will be able to use functions such as 'Post to Chatter' and will be able to view the Chatter feed of each Account file.





23. Disable Cut Copy Paste

This option is used for enabling/disabling cut/copy-paste options. Set this attribute to true by checking the checkbox if you want to disable cut/copy-paste operations.

24. Enable Shortcut Creation

This option is used to configure Shortcut Creation in S-Drive components. Select the checkbox to see Create Shortcut button on toolbar. Deselect the checkbox to disable Create Shortcut button on toolbar.

25. Default sort field name

This option is used to order/sort S-Drive documents based on a field. You need to set the name of the field that should be used to order the list of files. For this example, it should be filled in as "cg__File_Name__c". You can change this option from the settings button located at the toolbar of S-Drive attachments anytime. *See "S-Drive Lightning User Guide" for more information about using the S-Drive attachments.*

26. Default sort order

This option is used to set the sort order direction of the S-Drive documents. There are two possible values for this attribute: "asc" or "desc". The default value is "asc" which stands for ascending. You can change this option from the settings button located at the toolbar of S-Drive attachments anytime. See "S-Drive Lightning User Guide" for more information about using the S-Drive attachments.

27. Files Count for A Page

This option is to set the number of files to be shown in an attachment page. The default value for this section is set to 100. If this value is set to '30' and object has 91 total items, the files will be displayed in 4 pages. You can change this option from the pagination setting located under the toolbar of S-Drive attachments. *See "S-Drive Lightning User Guide" for more information about using the S-Drive attachments.*

28. Default view type

This option is to set the default view type of the file list table. There are 3 options you can choose: List, Thumbnail and Grid. You can change this option from the toolbar of S-Drive attachments and set it as default by using the settings button. *See "S-Drive Lightning User Guide" for more information about using the S-Drive attachments.*





29. Show Folder Tree

This option sets the default behavior of the folder tree component located on the left-hand side of the S-Drive attachments page. You can choose to hide or show the Folder Tree component by using the settings button on the toolbar of S-Drive attachments. *See "S-Drive Lightning User Guide" for more information about using the S-Drive attachments.*

30. Show Breadcrumb

This option sets the default behavior of the breadcrumbs located on the left-hand side of the S-Drive attachments page, above the folder tree component. You can choose to hide or show the breadcrumbs by using the settings button on the toolbar of S-Drive attachments. See "S-Drive Lightning User Guide" for more information about using the S-Drive attachments.

31. Open File After Clicking on It

This option is used to configure the behavior when a file is clicked on. Select the checkbox to open the file when it is clicked on. Deselect the checkbox to go to the Details view of the file.

32. Enable Field

This option is used to configure Fields button on toolbar which is used to select and display fields. Select the checkbox to enable the button on toolbar and deselect the checkbox to hide.





5.3 S-Drive Compact View Configuration

In order to use S-Drive in narrow spaces in Lightning Experience, you can use the configuration option, "Use Compact View" checkbox.

Title	0
Account Files	
Use Custom Logo on Header	0
✓ Use Compact View	0
Parent Object Name	0
Account	



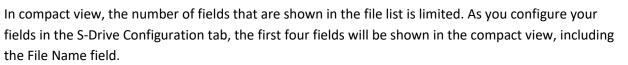
The compact view enabled S-Drive component will look like the following:

Account Files									
	†	🗄 🗘 🖿 T	Ď						
		HOME							
Drag and drop file(s)									
THUMBNAIL	THUMBNAIL VFILE NAME DESCRIPTI FILE SIZE CREATED								
_	CyanGate.pptx		37.64 KB	Yasemin D					
- 📙 🔻	Documents		0 bytes	Yasemin D					
-	Fresh.jpg		1.2 MB	Yasemin D					



Note that the search bar is not available in compact view.





vanGate

STEP 1:	STEP 2: Available Fields of Selected Object					
	Hidden Fields			Displayed Fields		
Account File	Account Account File Name Deleted Last Modified By ID Last Modified Date Page Count Private Record ID Sync Id System Modstamp	•		File Name Description File Size Created By ID Tags Created Date	*	



In a configuration like the figure above for Account Files, the following fields will be shown in the component: File Name, Description, File Size and Created By ID.

5.4 S-Drive Email (Beta)

The Email Lightning component allows users to write emails with attachments of files from S-Drive. You can place the email component to any lightning page with the Lightning App builder and attach files of any file object type from any record. If you have **Enhanced Emails** enabled in your org, emails sent from S-Drive email component will show up in your email Activity History.

Enabling S-Drive Email

Open the Lightning App Builder by clicking on the cog wheel at the top right corner of your Object record page and click on "Edit Page".





	*• • • ? *	* 🔺 🐻
	Setup for current app	0 111111100
+ Follow New Cont	Developer Console	:e 🔻
- MEAN-2 (11) - 21 (C) \\$6 MEAN-2	Edit Page	See 31/2
Search	Edit Object	Q



Drag and drop the S-Drive E-Mail (Beta) component from the lightning components panel to your desired location in the Lightning page editor.

~ 0	Custom (8)
4	Create Case With Attachments
4	EmailComponent
4	EmailConversation
4	LookupForRecords
ý	LookupForRecordsResult
F	S-Drive E-Mail (Beta)
¥	S-Drive for File Objects
ý	SDrive



6 DISPLAYING "S-Drive" AND "S-Drive Configuration" TABS

Display the S-Drive Tab and S-Drive Configuration tab for easy access.

6.1 Classic Tabs

To display "S-Drive" and "S-Drive Configuration" tabs in your custom app (e.g. "Sales" app) in Classic

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1. Go to User Menu on the top right corner and choose "My Settings" (Figure 6-1).



2. Under "Display & Layout" tab, click on "Customize My Tabs" button.

Quick Find	Customize My Tabs
My Settings	Choose the tabs that will display in each of your apps.
L Personal	Custom App: Site.com
🔳 Display & Layout	Available Tabs Selected Tabs
Customize My Tabs	App Launcher Assets Accounts
Customize My Pages My Social Accounts and Contacts Accessibility	Campaigns Add Cantads Up Chatter Console Contracts Cases Contracts Contracts Contracts Remove My Example Objects My Example Object Files
🖂 Email	Dashboards Data.com
C Chatter	Save Cancel
Calendar & Reminders	
🕂 Desktop Add-Ons	
📩 Import	

- Figure 6-2
- 3. Select your custom app from the "**Custom App**" drop down menu (e.g. "**Sales**" app). Move "**S-Drive**" and "**S-Drive Configuration**" tabs from "**Available Tabs**" box to "**Selected Tabs**" box by selecting and clicking the right arrow as shown below. Click "**Save**" (Figure 6-3).



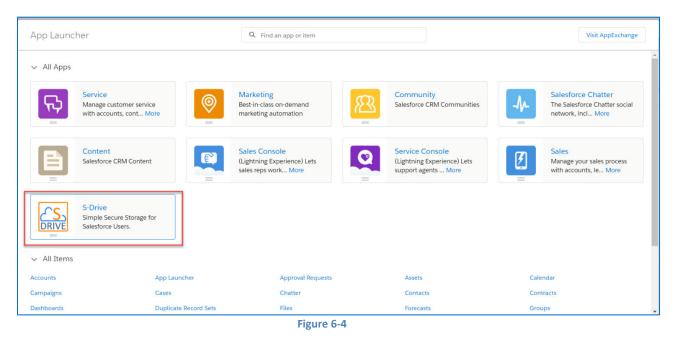


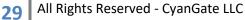
Custom App:			
Sales	~		
Available Tabs		Selected Tabs	
Leads Macros Media Assets Positions Price Books Products Reports S-Drive Mobile Site.com Solutions Streaming Channels	Add Remov	Home (default) Contacts Campaigns Accounts Opportunities Media Assets Media Assets PertoDjects S-Drive S-Drive Configuration	Up V Down

6.2 Lightning Tabs

To display "S-Drive", "S-Drive Configuration" and "S-Drive Advanced Search" tabs in Salesforce Lightning,

- 1. Click on **"App Launcher"** (**!!!**) menu which is on the left corner of the Salesforce page.
- 2. Click on "S-Drive: Simple Secure Storage for Salesforce Users" app (Figure 6-4).









3. After clicking, you will return to your Home page in Salesforce, and you will be able to view the S-Drive related tabs on top of the page.



7 S-DRIVE ADVANCED CONFIGURATION

7.1 **Configuring S-Drive on Standard/Custom Objects**

S-Drive can be used for uploading files to standard and/or custom object without any restriction. You need to create objects and configure several settings manually to use these features.

Note that for Account, Case, Contact, Opportunity and Lead standard objects, the associated S-Drive file objects and override pages are bundled with the S-Drive installation. If you'll use S-Drive attachments for these standard objects as override, you can use bundled objects and/or pages where appropriate.

This section will guide you through how to create an S-Drive file object to go with the object you want to use S-Drive with, and a how to display the S-Drive area on your object page.

7.1.1 **Creating S-Drive File Objects**

Every object you want to use S-Drive with must have an associated S-Drive File object with a masterdetail relationship where the file object is the detail. S-Drive can create this object for you.

Note: For Accounts, Cases, Contacts, Opportunities and Leads objects, S-Drive File Objects have already been provided as part of the S-Drive package. For those, you can skip to section 4: Creating Custom Object File Pages.

For this feature to be available, you must configure remote site settings. Go to **Setup -> Security -> Remote Site Settings** and create a new remote site named anything let's say "SDriveMeta" and copy your organization domain for example as: "https://cgsdrive-dev-ed.my.salesforce.com".

To create an S-Drive file object for your custom object, go to S-Drive Configuration -> Customization Settings section.





Custom Object S-Drive Config

Custom File ObjectName: User is supposed to input	ustom file objects are listed in the list. one on will be displayed related objects table, If there were no related object the table will be shown empty.
Object List	
Mail Merge Template My Example Object Name Network Network Member Network Member Group Note Note and Attachment Object Permissions Open Activity	
cg_My_Example_Object_File_c	Related Objects
	Custom File ObjectName My Example Object File

Figure 7-1

Scroll down to the Custom Object S-Drive Config part of the page and follow the steps below:

(1) "Object List": Objects of the organization except for S-Drive file objects are listed in the dropdown menu.

(2) "Related Objects": Any related object to the selected one on (1) will be displayed here.

(3) "Custom File ObjectName": Choose a name for the new file object that is being created.

(4) "Generate File Object": Click here to create a custom file object which is related to the object selected in (1).

After creating the object, the user can now configure SDrive attachment with the object thanks to automatically created file object.





7.1.2 (Optional) Creating Before Delete Trigger for Custom Object

For Accounts, Cases, Contacts and Opportunities objects, these triggers have already been provided as part of the S-Drive package. You can skip "Creating Before Delete Trigger for Custom Object" section for these four standard objects and go to step 4: Creating Custom Object File Pages.

In this step we'll create a *before delete* trigger for our custom object. This trigger is used to prevent deletion of the object if it has custom object files in it. This step is an optional step, but we strongly recommend creating this trigger. The following steps will explain the creation of the trigger:

 Go to Setup -> App Setup -> Create -> Objects and click the label of your custom object (Figure 7-2). (To create triggers on standard objects, go to Setup -> App Setup -> Customize -> Standard Object Name (e.g. Solutions) -> Triggers.)

×	<u>App</u>		successfully installs a
Edit Del	My Example Object	X	
Edit I Dal	Mu Example Object	Mu Example	
		Figure 7-2	

2. Find "Triggers" page block in the opening page. Click **New** button to create a new trigger. (Figure 7-3).

Triggers 0 Items, Sorted by Label			Q Quick Find	New
LABEL	API VERSION	SIZE WITHOUT COMMENTS	MODIFIED BY	

Figure 7-3





Apex Trigger	\mathbf{X}
Apex Trigger Edit	Save Quick Save Cancel
Apex Trigger Version Settings	
Is Active 🖉	
🤍 🔿 🏟 🏟 A A	
1 trigger <name> on cg_My_Ex 2 3 }</name>	ample_Objectc (<events>) {</events>



3. Make sure "Is Active" is checked in the "Apex Trigger Edit" screen (Figure 7-4). Type the trigger codes defined below, inside the code block (Figure 7-4). Make sure you changed the bold sections with your object name, object file name and namespace prefix. For our example object *YourObjectName* will be "My_Example_Object",

YourObjectNameContainingNamespacePrefix will be "cg__My_Example_Object__c", NamespacePrefix will be "cg__" and YourObjectFileNameContainingNamespacePrefix will be "cg__My_Example_Object_File__c (Figure 7-5). Click **Save** button to create the trigger (Figure 7-4).

```
🔍 🔶 🦔 🍖 🗛 A
   trigger My_Example_ObjectBeforeDelete on cg__My_Example_Object__c (before delete)
 3
       List<Id> ids = new List<Id>();
 4
 5
       for(cg My Example Object c obj : Trigger.old)
 6
       {
           ids.add(obj.Id);
 8
       }
 9
       Integer tempCount =
           [Select count() from cg_My_Example_Object_File_c
               where cg_My_Example_Object_File_c.cg_WIP_c = false and
               cg_My_Example_Object_File_c.cg_Parent_c in :ids];
 14
       if(tempCount > 0)
16
       {
 17
           Trigger.old[0].addError('There are files attached to this object.' +
               ' You need to first delete object files manually and' +
               ' then delete the object!');
       }
```







```
trigger YourObjectNameBeforeDelete on
YourObjectNameContainingNamespacePrefix (before delete)
{
    List<Id> ids = new List<Id>();
    for(YourObjectNameContainingNamespacePrefix obj :
Trigger.old)
    {
        ids.add(obj.Id);
    }
    Integer tempCount = [Select count() from
YourObjectFileNameContainingNamespacePrefix where
YourObjectFileNameContainingNamespacePrefix.NamespacePrefixWIP
c = false and
YourObjectFileNameContainingNamespacePrefix.NamespacePrefixParen
t c in:ids];
    if(tempCount > 0)
    {
         Trigger.old[0].addError('There are files attached to
object. You need to first delete files manually and then delete
the object!');
    }
}
```

Notes

If you have a sandbox environment, and if you must create a test case in order to deploy the trigger to your production organization, below is an example test class for My_Example_Object custom object.





```
0isTest
private class My_Example_Object_Test {
   static testMethod void triggerTestl()
        test.starttest();
       cg_My_Example_Object_c obj = new cg_My_Example_Object_c();
       obj.Name = 'Test My Example Object';
        insert obi:
       cg_My_Example_Object_File_c aFile = new cg_My_Example_Object_File_c();
        aFile.cg File Name c = 'Test File';
       aFile.cg_WIP_c = false;
        aFile.cg_Parent_c = obj.Id;
        insert aFile;
        try
        {
            delete obj;
            system.assert(false); //should never happen
        -}
        catch(Exception e)
        {
            system.assert(true); //should fail
        -),
        test.stoptest();
   }
3
```

After creating above test class and enabling the trigger, if you try to delete a My Example Object which contains My Example Object Files, you'll get this warning message: "There are object files attached to this object. You need to first delete object files manually and then delete the object!"

7.1.3 Creating Custom Object Files Page for Classic

In this fourth step we'll create custom object file's Visualforce page. This page can be used to override the object's view, or it also can be used as an inline section for the object's layout. At the end of this section, use cases for both scenarios will be displayed.

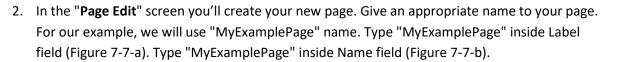
To create an object file page, follow these steps:

 Go to Setup -> App Setup -> Develop-> Pages and click the New button at the top of the page (Figure 7-6).

Visualforce Pages

```
Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing a
View: AII 
Create New View
A | B | C | D | E | F | G | H | I | J | K
Developer Console New
Figure 7-6
```





	(d)
Page Edit	Save Quick Save Cancel Whare is this used? Component Reference
Page Information Label MyExamp Name MyExamp Description	lePage b
Visualforce Markup Version Settings	
Q → ⊕ ┍ A A	
<pre></pre>	

Figure 7-7

You need to set the "Salesforce.com API" version to 22.0 or above to use S-Drive 2.0 features. To set the version number click the "Version Settings" tab next to the "Visualforce Markup" tab and change the version number from drop-down (Figure 7-8).

Visualforce Markup Version Settings			
Name	Version	Namespace	Туре
Salesforce.com API	22.0 -		Salesforce.com API
	Figure 7-8		

Now we need to create our page content. We will be using custom components in our page. Basically, our page skeleton will be as follows:

```
<apex:page standardController="My Example Object c"</pre>
   tabStyle="My Example Object c">
  <cg:AttachmentComponent
   title="My Example Object Files"
   customObjectName="My Example Object c"
   customObjectFileName="My Example Object File c"
                 objectId="{!Id}"
   objectNamespacePrefix="mynamespaceprefix
   fileNamespacePrefix="mynamespaceprefix
   enableCopyURL="true/false"
   enableDelete="true/false"
   enableDownload="true/false"
```





```
enableEdit="true/false"
   enableEmail="true/false"
   enableUpload="true/false"
   enableChatter="true/false"
   inline="true/false"
   inlineEdit="true/false"
   legacyIdSupport="true/false"
   privateEnabled="true/false"
   orderBy="File Name c"
   allowedFileExtensions="*.avi;*.txt"
   defaultEmailAddress="user@company.com"
   enableAttachFromSDriveFolders="true/false"
   enableFolders="true/false"
   relationshipName="Parent r"
   pageSize="100"
   useUploadAsPopup="true/false" />
</apex:page>
```

As an example, the following will be a typical *custom override Visualforce page with inline edits and chatter enabled*:

```
<apex:page standardController="My_Example_Object__c"
    tabStyle="My_Example_Object__c">
    <apex:detail inlineEdit="true" relatedList="true"
showChatter="true"/>
    <cg:AttachmentComponent
    title="My Example Object Files"
    inline="true"
    customObjectName="My_Example_Object__c"
    customObjectFileName="My_Example_Object_File__c"
    objectId="{!My_Example_Object__c.Id}" />
</apex:page>
```

You need to set these component attributes based on your configuration. Let's discuss these component attributes:

a) standardController

You need to set this standard controller to the object that you want to use with. For our example this is the custom object name that we created: "My_Example_Object__c". As you can see from the example we appended "__c" to the end of the name. This means this object is a custom object. You can use standard objects also. For standard objects you will not append "__c" at the end of the object name (e.g. Solution). Also, do not prepend your account's namespace prefix.





b) tabStyle

This is the tab style of the page. Normally you can set it same with standardController. That means tab style will be derived from the standard controller you chose.

c) title (optional)

This is the title of the page block inside the object page. You can set it to "Custom Object Name" Files. For our example it will be "My Example Object Files". This field is optional and if you don't provide a value for this field, it will be set as "Attached Files".

d) customObjectName

This is the name of the custom or standard object that will be the object that the files will be attached to. For our example, it is "My_Example_Object__c". If this is a custom object you need to append "__c" to the end of the name. If this is a standard object you won't append "__c" at the end of the object name (eg. Solution). Also do not prepend your account's namespace prefix.

e) customObjectFileName

This is the name of the S-Drive file object that we created in previous sections. This object holds the information regarding the attached files. For our example, it is "My_Example_Object_File__c".

f) objectId

You need to pass in the "**{!Id}**" value for this attribute. This attribute is required to retrieve object id.

g) objectNamespacePrefix (optional)

This is the object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you created this custom object inside your organization, your object namespace prefix is same as your organization namespace prefix. If this object belongs to a managed package, you need to use that managed package's namespace prefix. If your object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is "exampleprefix" you need to set objectNamespacePrefix as "exampleprefix_".

h) fileNamespacePrefix (optional)



This is the file object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you created this custom object file inside this organization, your file namespace prefix is same with your organization namespace prefix. If this file object belongs to a managed package, you need to use that managed package's namespace prefix. If your file object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is "exampleprefix" you need to set fileNamespacePrefix as "exampleprefix_".

i) enableCopyURL (optional)

This option is used to enable/disable "Copy URL" link in the page. There are two possible values for this attribute: **"true", "false"**. If "false" is set "Copy URL" links won't be displayed in this page. This field is optional and if you don't provide a value for this field, it will be set as "true", therefore "Copy URL" link will be visible for each asset. Note that security and permission settings override this option.

j) enableDelete (optional)

This option is used to enable/disable "Del" links for all attachments in the page and "Delete Selected" button for the whole page. There are two possible values for this attribute: **"true", "false"**. If "false" is set "Del" links and "Delete Selected" button won't be displayed in this page. This field is optional and if you don't provide a value for this field, it will be set as "true" therefore, "Del" links and "Delete Selected" button will be visible. Note that security and permission settings override this option.

k) enableDownload (optional)

This option is used to enable/disable "Download", "Open" and "Zip & Download" for all attachments in the page. There are two possible values for this attribute: **"true", "false"**. If "false" is set "Download", "Open" and "Zip & Download" won't be displayed in this page. This field is optional and if you don't provide a value for this field, it will be set as "true" therefore, "Download", "Open" and "Zip & Download" links will be visible for each asset. Note that security and permission settings override this option.

I) enableEdit (optional)

This option is used to enable/disable "Edit" link for all attachments in the page. There are two possible values for this attribute: **"true", "false"**. If "false" is set "Edit" links won't be displayed in this page. This field is optional and if you don't provide a value for this field, it will be set as "true" therefore, "Edit" links will be visible for each asset. Note that security and permission settings override this option.



m) enableEmail (optional)

This option is used to enable/disable "Email Selected" button in the page. There are two possible values for this attribute: **"true", "false"**. If "false" is set "Email Selected" button won't be displayed in this page. This field is optional and if you don't provide a value for this field, it will be set as "true", therefore "Email Selected" button will be visible for each asset. Note that security and permission settings override this option.

n) enableUpload (optional)

This option is used to enable/disable "Upload File(s)" button in the page. There are two possible values for this attribute: **"true", "false"**. If "false" is set "Upload File(s)" button won't be displayed in this page. This field is optional and if you don't provide a value for this field, it will be set as "true", therefore "Upload File(s)" button will be visible for each asset. Note that security and permission settings override this option.

o) enableChatter (optional)

This option is used to enable/disable Chatter related activities for files. There are two possible values for this attribute: **"true", "false"**. If "false" is set, "Post to Chatter" and Chatter Feed won't be displayed in the page. This field is optional and if you don't provide a value for this field, it will be set as "true", therefore the "Post to Chatter" button and Chatter Feed in the details page will be displayed for each asset. Note that security and permission settings override this option.

p) inline (optional)

This option is used to decide if the page is used with override for the view or as a section in the page layout. There are two possible values for this attribute: **"true"**, **"false"**. Set this attribute to "true" to use this component inside an inline Visualforce page. The default for this attribute is false. One important note about "inline" is it needs to be set to true for "*typical custom override Visualforce page with inline edits and chatter enabled*" example because of a bug related to Salesforce.com.

q) inlineEdit (optional)

This option is used to decide if the inline edit feature will be available for the other parts of the page or not. If inline option is set to true, inlineEdit option is ignored, meaning that inlineEdit feature can only be used when the view of the object is overridden. So, you cannot use this option with the use as inline attachment feature. There are two possible





values for this attribute: **"true", "false"**. Set this attribute to "true" to enable the inlineEdit feature for the Visualforce page. Also note that this feature is supported for the pages with version 21.0 and above (Spring 2011). The default for this attribute is false.

There are three possible scenarios for the usage of the inlineEdit:

- 1- If *inline is set to true* (using inline attachment feature), *inlineEdit's value does not have any meaning* (it is ignored).
- 2- If *inline is set to false* (default is false, using with the override for the view of the object), and we set *inlineEdit to true*, it means *inline editing for the page elements is enabled*.
- 3- If *inline is set to false* (default is false, using with the override for the view of the object), and we set *inlineEdit to false*, it means *inline editing for the page elements is disabled*.

r) legacyIdSupport (optional)

This option is used for legacy id support. There are two possible values for this attribute: "true", "false". Set this attribute to true to use 18-character ids. The default for this attribute is false.

s) privateEnabled (optional)

This option is used for enabling public/private file access to the S-Drive attachments and commonly used to limit the customer portal users' access to individual files. Before setting this property, you need to add a new field to your custom object file named 'Private' (See 'Creating Custom Object Files' section for more information). Set this attribute to true if you want to enable private/public flag. Setting the private flag on a file hides the file from customer portal users. There are two possible values for this attribute: **"true", "false"**. The

default for this attribute is "false" except for the Case Files custom page (Figure 7-9).





] Actions	File Name	File Size	Created By	Created Date	Private	Description
Download Copy URL Edit Del	Radyo.m3u	11.95 KB	CyanGate CyanGate	Thu Sep 30 12:12:00 GMT 2010		Another Example
Download Copy URL Edit Del	Problems for the Upgrade to 1.11.bt	828 bytes	CyanGate CyanGate	Thu Sep 30 12:12:49 GMT 2010		Test
Download Copy URL Edit Del	TOD0.txt	1.26 KB	Umut Dogan	Fri Oct 01 11:48:11 GMT 2010	1	Example Descripti
Description: Example Description	Upload Files		×	×))		
	File		Description	Private Status		
Private:	File SDriveTools.txt	Size 5.40 KB	Description	Private Status		
Private:	SDriveTools.txt		Description			

Figure 7-9

t) orderBy (optional)

This option is used to order/sort S-Drive attachments based on a field. You need to set the name of the field that should be used to order the list of files with namespace prefix. This attribute is optional and leaving this empty will not order the results in any specific order. For example: "cg___File_Name__c". With S-Drive 1.18, dynamic ordering is possible, so you can set this value to set out-of-the-box ordering and users can order items on-the-fly.

Note that Salesforce does not allow Long Text Area fields to be ordered/sorted. So, if you want to order/sort by a long text are field (e.g. Description_____c), you need to change its type from 'Long Text Area' to 'Text Area'. This will limit your description to be 255 characters long.

u) allowedFileExtensions (optional)

You can use this option if you want to limit the file types to be uploaded into selected object's S-Drive attachments. Semicolon separated list of file extensions that are allowed to upload. This attribute is optional and leaving this empty will allow all kind of files to be uploaded. For example: "*.jpg;*.txt" will limit the files to be uploaded to jpg and txt files (Figure 7-10).



<mark>८ऽ</mark>DRIVE

Select file(s) to	upload by s3.amazonaws.com		? 🔀
Look in:	C S-Drive Project	🚽 O 🛊 🖻 🖬-	
My Recent Documents Desktop	Step3.3PG Beta6.txt RoadMap.txt Migration Tool.txt		
My Documents			
My Computer	File name:	and a second	Dpen Cancel

Figure 7-10

v) defaultEmailAddress (optional)

You can use this option, if you want to set a default "TO" email address for sending emails from your S-Drive Attachments. This option is automatically set for out of the box Contact, Opportunity, Case and Account S-Drive Attachments.

For example, if you select a Contact S-Drive Attachment for a contact and click "Email Selected" button, "Email Files" screen will be opened and "To..." field will be filled with the contact name as shown below:



If default email address is not found in your Salesforce Contacts, that email will be set to the "Additional To..." section of the "Email Files" page. These "To..." or "Additional To..." fields are auto-filled when "Email Files" page is loaded. You can clear them and/or select other contacts as you wish.

w) enableAttachFromSDriveFolders (optional)

This option is used to enable/disable "Attach from S-Drive Folders" button in the page. There are two possible values for this attribute: **"true", "false"**. If "false" is set "Attach from S-Drive Folders" button won't be displayed in this page. This field is optional and if





you don't provide a value for this field, it will be set as "true"; therefore "Attach from S-Drive Folders" button will be visible for each asset. Note that security and permission settings override this option. Also note that "Attach from S-Drive Folders" button is not visible for customer portal users, no matter what the *enableAttachFromSDriveFolders* value is.





x) enableDownloadManager (optional)

Download Manager has been deprecated. Zip & Download can be used instead of download manager. You can control it using enableDownload flag.

y) enableFolders (optional)

This option is used to enable/disable folders support for S-Drive Attachments. Set this attribute to false to disable folders. If you disable folders for S-Drive Attachments, "New Folder" button and breadcrumb will be removed from the buttons section. This configuration won't hide/delete currently created folders. The default for this attribute is true.

z) relationshipName (optional)

Master-detail relation used for selected standard/custom object. This attribute is optional and default value is 'Parent_r'.

aa) pageSize (optional)

Page size for pagination. Attachment items will be paginated based on this value. So, if this value is set to '30', and object has 91 total items, 4 page will be displayed. This attribute is optional and default value is 100.

Home		Total Items: 91 Pag	e: 1 2 3 4 Sear	ch Q	
Actions	T File Name A	Created By ID	Created Date	Description	File Size
Edit Del	Documents	Umut Dogan	8/12/2011 3:48 AM		0 bytes

bb) enableJavaUpload (optional)

Java upload has been deprecated.



This setting will not work if HTML is selected for Default Upload Manager in S-Drive Configuration tab. We strongly suggest using HTML upload.

cc) useUploadAsPopup (optional)

Set this attribute to true to enable drag and drop functionality and upload widget as a popup window for selected S-Drive Attachment object. The default for this attribute is false. This value overrides the "Default Upload Manager" configuration in "S-Drive Configuration".





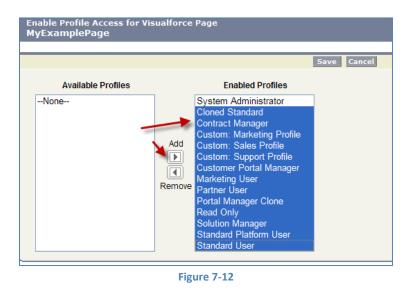
If you want to get more information about component attributes, you can click "**Component References**" button and find **cg:attachmentcomponent** reference from the list. (Figure 7-7-d).

After setting the page based on above component attributes, click "Save" button.

3. Lastly set the security for your page on other profiles. Go to **Setup -> App Setup -> Develop -> Pages** and click **Security** link next to your page name (Figure 7-11).

Earl Der Security	myCustomPage	MyCustomPage	cg	17.0
Edit Det Security	MyExamplePage	MyExamplePage	cg	17.0
Edit Security 🧖 🖉	OpportunityFilePage	OpportunityFilePage	cq	17.0
		Figure 7-11		

Move all profiles (or select based on your needs) from "Available Profiles" to "Enabled Profiles" as shown in Figure 7-12. If you skip this step, your users that belong to the disabled profiles will see an error page similar to Figure 7-13.





4. Now we have an object (or created our custom object), created our custom object file and custom object file page.

CSDRIVE



At this point, we can override the custom object's view or we can use S-Drive Attachments as an inline section in the page layout.

Overriding the View of the Object

"Overriding the view of the object" means that the page will be used as an override to the standard object page. In this case, the S-Drive Attachments section will be a section at the end of the standard page layout.

5. Go to Setup -> App Setup -> Create-> Object and click the label of your custom object. You'll see "Object Definition Detail" screen. Scroll down and find "Standard Buttons and Links" page block and click Edit action next to the View label (Figure 7-14-a). Then select Visualforce Page for Override With section and pick MyExampleFilePage (the custom page you created previously for this object) from the drop-down box. Click Save button to complete the override (Figure 7-14-b).

Standard Buttons and Links				Override Properties	Save Cancel	
Action	Label		Name	Overridden		
Edit	My Example Objects Tab		Tab		Label	View
Edit	List		List		Name	View
Edit	View		View		Default	Standard Salesforce.com Page
Ealt	view		view		Override With	No Override (use default)
Edit	Edit		Edit			Custom S-ControlNone
Edit	Delete	_	Delete			Visualforce Page MyExamplePage [cg_MyExamplePage]
Edit	Clone	a	Clone		Comment	b

Figure 7-14

6. Now it will display **View** as **Overridden** in the *Standard Buttons and Links* section (Figure 7-15).

Standard Buttons and Links							
Action	Label	Name	Overridden	Display			
Edit	My Example Objects Tab	Tab		Standard Salesforce.com Page			
Edit	List	List		Standard Salesforce.com Page			
Edit	View	View	 	MyExamplePage (Visualforce Page)			
	E 49	T 404	1999 S.	Clandard Calcoferee com Dage			

Figure 7-15

7. After creating a test object, you should see "My Example Object Files" page block at the end of the object detail page (Figure 7-16). See "User Guide" for more information on how to use the buttons and functions in this page block.

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My Example Object Files	New Folder	Upload File(s)	Attach from S-Drive Folders	Email Selected	Delete Selected	Download Manager
No records to display						

Figure 7-16

• Using as Inline Attachment

"Using as inline Attachment" means that the attachment component will be used as a section in the object's page layout. So, your customizations to the page layout won't be affected and you can append S-Drive Attachments in the page layout anywhere you would like. *Please note that "inline" component attribute for the custom page must be set to* **"true"** to use the S-Drive Attachments as inline.

 Go to Setup -> App Setup -> Create-> Object and click the label of your custom object. You'll see "Object Definition Detail" screen. Scroll down and find "Page Layouts" page block and click Edit action next to the main layout of the object (Figure 7-17).





2. Click Fields and drag-drop a **Section** to an appropriate place in the layout (Figure 7-18).



 After dropping the "section", you'll see the properties screen for the dropped "section". Type in a section name and select if you want to display section header on "Detail Page" and "Edit Page". Also select "1-Column" for the layout. Then click OK button. You can customize these settings based on your layout needs (Figure 7-19).





Section Properties	×
Section Name S-Drive Attachments	
Display Section Header On 🗌 Detail Page	
Edit Page	
Layout	
I-Column O 2-Column	
OK Cancel	



4. Now, go to **Visualforce Pages** from the top. Select the "custom page name" you created (e.g. TestPage) and drag it into the section that you created previously (Figure 7-20).

Save 🔻 Quick Save Previe	ew As 🔻 Cancel 🛛 🛷 Undo 🐟 Red	lo 🛛 🔳 Layout
Fields	Quick Find Page Name	8
Buttons	*■ Blank Space	
Visualforce Pages 🛛 🔪	Section	
Custom S-Controls	Test Page	
Related Lists		
Test Object Sample Test Object Detail		E
		L.
Information (Header		
🚊 Test Object Numbe	er GEN-2004-001234	
System Information	(Head ar visible on edit only)	
🚊 Created B	By <mark>Sample User</mark>	
Custom Links (Heade	er vis ble on edit only)	
	(Heider not visible)	

- 5. After dropping the page into the section, click the properties icon for the page on the top-right corner of the page in the section (Figure 7-21).





S Drive Attachments (rieader not visible)	* < 1
Figure 7-21	

 Keep "Width (in pixels or %)" as "100%", set "Height (in pixels)" to "500". And check "Show scrollbars" option. You can optionally check "Show label". Click OK button (Figure 7-22).

ies 💌
100%
500
Cancel



7. You can use "Inline Visualforce Expander" tool to automatically resize inline S-Drive page based on the size. So if you apply this tool to inline S-Drive Attachments page, page's height will be dynamic based on the number of items in the list. For this type of a configuration we suggest you to set the "useUploadAsPopup" attachment component property to set "true". You can install the "Inline Visualforce Expander" from AppExchange:

http://appexchange.salesforce.com/listingDetail?listingId=a0N3000004cEEyEAM And you can download the installation/configuration document here: http://appexchange.salesforce.com/servlet/servlet.FileDownload?file=00P3000007K casEAC

Final result will be like below screen:



ccount Detail		Edit Delete	Include Offline	Work with Portal V			
Account Owner	John Resig [Change	2]			Rating		
Account Name	Test [View Hierarchy]				Phone		
Parent Account					Fax		
Account Number					Website		
Account Site				Ticke	Symbol		
Туре				Ov	vnership		
Industry					ployees		
Annual Revenue					SIC Code		
Billing Address				Shipping			
Customer Priority					SLA		
SLA Expiration Date				SLA Serial			
Number of Locations				Upsell Op	portunity		
Active							
Account Files		New Folder	Upload File(s)	Attach from S-Drive Folders	Email Selected Dele	ete Selected	
Home					Total	Items: 5 Page: 1 2	Search Q
Actions	T File Name	*		Created Date	Created By ID	Description	File Size
Download Copy URL Ed	lit Del 🏼 👸 index-all.!	<u>itml</u>		10/9/2012 7:00 AM	John Resig		61.64 KB
Download Copy URL Ed	lit Del 📧 kcell 1.jpg			10/8/2012 4:58 AM	John Resig		114.23 KB
Download Copy URL Ed	lit Del 🍯 overview-	frame.html		10/9/2012 7:01 AM	John Resig		1.49 KB
						Tota	I Items: 5 Page: 1 2

- 8. We are done with the configuration. Save the layout by clicking the "Save" button on the left-top corner of the screen (Figure 7-18).
- 9. Now if you go to your object's tab (page), you'll see the S-Drive Attachments inline in the page layout (Figure 7-23).

Test Object Files	Upload File(s) Attach from S-Drive Folders Email Selected Delete Selected
	Figure 7-23

7.2 Creating Lightning Page

With 2.0 release, S-Drive is available for Lightning Experience. In this section, you can learn about creating lightning page for custom objects. To create a lightning page. This is the same process used in section 5.2 S-Drive File Area for Lightning (Accounts, Cases, Contacts, Opportunities, Leads)

1. You need to switch to Lightning Experience and open Lightning App Builder. To open it, you should open a record from your custom object (My_Example_Object__c) and





click on "Create Lightning Page" link under **Setup"** icon (🍄). If you already have a

Lightning Page, you should click on "Edit Page" link under c **Setup**" icon ([‡]). See the figure below.

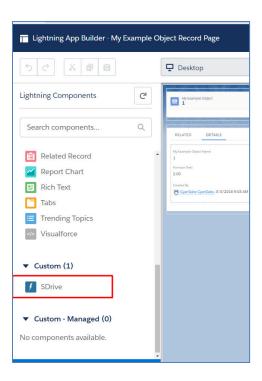
Q Search	Salesforce	2.1 5 133.05 KB 👷 🕇	? 🏚 🌲 👌
S-Drive Home S-Drive	S-Drive Configuration S-Drive Advanced Search	🔯 Setup	
My Example Object	DAGEN (1997-SAGET (SAMOMMY - DAGE)	Developer	
1		+ Follow E	
		Edit Object	
RELATED DETAILS		ACTIVITY CHATTER	
My Example Object Name			
1		Activity Timeline	C ^d Expand All
Formula Testt 2.00		Next Steps	
Created By	Last Modified By	No next steps. To get things moving, a meeting.	add a task or set up a
La CuanCata CuanCata	Le CuanCata CuanCata	Theeting.	

Figure 7-24

2. After clicking on "Edit Page" or "Create Page" option, "Lightning App Builder" will be shown. You will see **"Lightning Components"** section on the left-hand side. You need to scroll down to see the **"SDrive"** component, under **"Custom**".

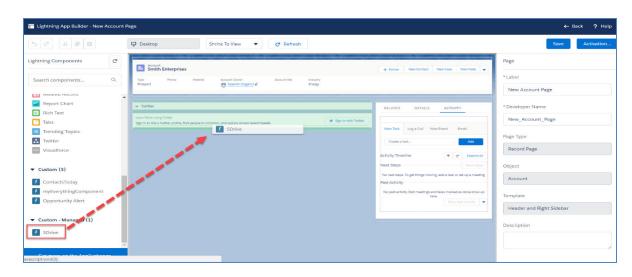








3. Grab the **S-Drive** component and drag it to the right side where you see the components of the account page. Drop wherever you want the S-Drive component to be placed.







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- 4. You need to edit the following required fields correctly, to configure S-Drive for your custom object in Lightning Experience (Figure 48). You can also change the settings from a selection of checkboxes which include: Enable copy URL, Enable delete, Enable download, Enable edit, Enable e-mail, Enable upload, Enable folders, Enable private files. You can scroll down to see more settings about the S-Drive Attachment component, such as showing folder tree component and breadcrumbs, which can be changed by using the toolbar menu afterwards.
- 5. After clicking on "Save" button, you need to activate the page to use the S-Drive component. You can click on "Activation" and choose "Assign as Org Default" or "Assign as App Default" from the pop-up screen, to view the attachment component. Now, you should see "My Example Object Files" block at the end of my example object record page. See "Lightning User Guide" for more information on how to use the buttons and functions in this block.





Note: If you want to enable multiple S-Drive components in one, single Lightning page, just repeat steps 3-5. But fill your "Component Id" section with another unique number. "Component Id" section is described in point (h), in the section below.

Place another S-Drive component from the Lightning Components section.

5 C X B B	Desitop Strink To View C Refresh	Save Activation
Lightning Components Cf		age > SDrive
Search components Q	Tostali Group A + Follow Edit Change Cleaner Delete ▼ T	itie O
	Type Prone Website Account Owner Account Site Industry	Account Files
Recommendations		Use Custom Logo on Header
Record Detail Related List - Single	C5. Account Files	arent Object Name 0
Related List Quick Links Related Lists		Account
 Related Record Report Chart 	Recycle Bin HOME Show 100 ; per page.	arent Object Prefix
E Rich Text	THUMBNAIL ACTIONS TYPE V FILE NAME ACCOUNT FILE NAME CREATED DATE FILE SIZE	
Tabs	C 🔂 🕯 🔻 💂 SDrive Installation Guide 2 201805-93609 2018-05-25 08-42-55 3.05 M8	ile Object Name
Visualforce		AccountFilec
▼ Custom (6)		ile Object Prefix
CaseCommunityStaticForm	CS. SDrive Files in Account	cg
CaseSdriveDeneme		elationship Field Name
CutCopyPasteLightningTrial	HOME	Account_r
SDrive	Broycle Bin Show 100 \$ per page.	omponent Id
SDrive (cg)	No records found	1 Enable Copy URL
No components available.		Enable Copy URL 0
		Enable Delete

Figure 7-27

The component attributes shown in Figure 7-28 are discussed in this section below in detail:





Title	0			Disable Cut Copy Paste	0
My Example Object Files		Enable Copy URL	0	Default Sort Field Name	
Use Custom Logo on Header	0	C Enable Delete	0	File_Namec	
Parent Object Name	0	Enable Download	0	Default Sort Order	0
My_Example_Objectc		Enable Edit	0	asc	*
Parent Object Prefix	0	Enable E-mall	0	Files Count For A Page	0
		Default E-mail Address	0	100	
File Object Name	0			Default View Type	0
My_Example_Object_Filec		Enable Upload		list	٠
File Object Prefix	0			Show Folder Tree	0
		Allowed File Extensions	0	Show Breadcrumb	0
Relationship Field Name	0			Open File After Clicking On It	0
Parentr		Enable Folders	0		Ŭ
Component Id	0	Enable Private Files	0	 Set Component Visibility Filters 	
		Enable Chatter	0	+ Add Filter	

Figure 7-28

a) Title (optional)

This is the title of the page block inside the object page. You can set it to "My Example Object Files". This field is optional and if you don't provide a value for this field, it will be set as "S-Drive Files".

b) Use Custom Logo on Header

Checking this box will enable inserting a custom logo. In order to enable this checkbox, add your logo image to Static Resource with the name 'SCustomLogo' first. Note that Static Resource should be public.

c) Parent object name

This is the name of the custom or standard object that will be the object that the files will be attached to. For our example, it is "My_Example_Object__c". If this is a custom object you need to append "__c" to the end of the name. If this is a standard object you won't append



"___c" at the end of the object name (eg. Solution). Also, do not prepend your account's namespace prefix.

d) Parent object prefix (optional)

This is the object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you created this custom object inside your organization, your object namespace prefix is same with your organization namespace prefix. If this object belongs to a managed package, you need to use that managed package's namespace prefix. If your object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is "exampleprefix" you need to set objectNamespacePrefix as "exampleprefix_".

e) File object name

This is the name of the S-Drive file object that we created in previous sections. This object holds the information regarding the attached files. For our example, it is "My_Example_Object_File__c". Do not prepend your account's namespace prefix.

f) File object prefix (optional)

This is the file object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you created this custom object file inside this organization, your file namespace prefix is same with your organization namespace prefix. If this file object belongs to a managed package, you need to use that managed package's namespace prefix. If your file object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is "exampleprefix" you need to set File object namespace prefix as "exampleprefix_".

g) Relationship field name

Master-detail relation used for selected standard/custom object. This attribute is optional and default value is 'Parent__r'.

h) Component Id

If multiple S-Drive components are used in a page, this attribute should be set to a unique key for each component. For example: '1', 'a', etc.

i) Enable copy URL (optional)

This option is used to enable/disable "Copy URL" link in the page. If the checkbox is checked, you will be able to see the "Copy URL" link for each asset. The default value for this checkbox is





checked.

j) Enable delete (optional)

This option is used to enable/disable "Delete" option for all attachments in the page. If the checkbox is checked, you will be able to see the "Delete" link for each asset. The default value for this checkbox is checked.

k) Enable download (optional)

This option is used to enable/disable "Download", "Open" and "Zip & Download" options for all attachments in the page. If the checkbox is checked, you will be able to see the "Download" link for each asset. The default value for this checkbox is checked.

I) Enable edit (optional)

This option is used to enable/disable "Edit" option for all attachments in the pageIf the checkbox is checked, you will be able to see the "Edit" link for each asset. The default value for this checkbox is checked.

m) Enable e-mail (optional)

This option is used to enable/disable "E-Mail" option for all attachments in the page. If the checkbox is checked, you will be able to see the "E-Mail" link for each asset. The default value for this checkbox is checked.

n) Default email address (optional)

You can use this option, if you want to set a default "Additional To" email address for sending emails from your S-Drive Attachments. For example, if you select an Account S-Drive Attachment for an account and click "Email" button, "Email Files" screen will be opened and "Additional To" field will be filled with the email address you have provided here.

o) Enable upload (optional)

This option is used to enable/disable "Upload" option for all attachments in the page. If the checkbox is checked, you will be able to see the "Upload File(s)" link for each asset. The default value for this checkbox is checked.

p) Allowed file extensions (optional)

You can use this option, if you want to limit the file types to be uploaded into selected object's S-Drive attachments. Semicolon separated list of file extensions that are allowed to upload can be written here. This attribute is optional and leaving this empty will allow all kind of files to be



uploaded. For example, "*.jpg, *.txt" will limit the files to be uploaded to jpg and txt files.

q) Enable folders (optional)

This option is used to enable/disable folder support for S-Drive attachments in the page. If the checkbox is checked, you will be able to see the "New Folder" button. The default value for this checkbox is checked. If the box is not checked, the "New Folder" button will be removed from the toolbar section.

r) Enable private files (optional)

This option is used for enabling public/private file access to the S-Drive files and commonly used to limit the customer portal users' access to individual files. Set this attribute to true by checking the checkbox, if you want to enable private/public flag. Setting the private flag on a file hides the file from customer portal users. The default value for this checkbox is unchecked.

s) Enable Chatter

This option is used for enabling/disabling Chatter for Case files. If you enable this option, you will be able to use functions such as 'Post to Chatter' and will be able to view the Chatter feed of each Case file.

t) Default sort field name (optional)

This option is used to order/sort S-Drive attachments based on a field. You need to set the name of the field that should be used to order the list of files. For this example, it should be filled in as "cg___File_Name__c". You can change this option from the settings button located at the toolbar of S-Drive attachments anytime. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

u) Default sort order (optional)

This option is used to set the sort order direction of the S-Drive attachments. There are two possible values for this attribute: "asc" or "desc". The default value is "asc" which stands for ascending. You can change this option from the settings button located at the toolbar of S-Drive attachments anytime. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments*.

v) File count in a page (optional)

This option is to set the number of files to be shown in an attachment page. The default value for this section is set to 100. If this value is set to '30' and object has 91 total items, the files will be displayed in 4 pages. You can change this option from the pagination setting located under



the toolbar of S-Drive attachments. See S-Drive Lightning User Guide for more information about using the S-Drive attachments.

w) Default view type (optional)

This option is to set the default view type of the file list table. There are 3 options you can choose: List, Thumbnail and Grid. You can change this option from the toolbar of S-Drive attachments, and set it as default by using the settings button. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

x) Show Folder Tree (optional)

This option sets the default behavior of the folder tree component located on the left-hand side of the S-Drive attachments page. You can choose to hide or show the Folder Tree component by using the settings button on the toolbar of S-Drive attachments. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

y) Show breadcrumb (optional)

This option sets the default behavior of the breadcrumbs located on the left-hand side of the S-Drive attachments page, above the folder tree component. You can choose to hide or show the breadcrumbs by using the settings button on the toolbar of S-Drive attachments. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

z) Open File After Clicking on It

This option sets the file behavior when it is clicked on. If you want to open a file when it is clicked on, mark this checkbox as checked. If you want to preview a file when it is clicked on, mark this checkbox as unchecked.

7.2.1 Configuring *S-Drive for File Objects* Component for Object File Record Page

Every object that uses S-Drive, whether standard or custom, has a File Object associated with it. Accounts has AccountFiles. Cases has CaseFiles, etc. When you use S-Drive on a custom object, you create a custom file object. The tab for the file object shows a list view of documents uploaded to S-Drive for that object. If you click on a record in the list view, it will show information about the document, but there's no access to the document itself. In order to be able to get to the document from the list view record, you need to edit the Lightning page to add the *S-Drive for File Objects* component. This component provides easier access to any S-Drive file or folder through



the record page of the file, with **"Open in S-Drive"** button. This button redirects the user to S-Drive and opens the file or folder's detail page.

To configure your Object File Record Page with the *S*-*Drive for File Objects* component, go to any file object tab (Account Files, etc) and select a record.

Folder 0 bytes	1	Open in S-Drive
🔛 File Details	Account	
	Expand	File Name Folder 1 Created Date 2018-05-25 07:19:46 Created By Yasemin Doganci Description File Size O bytes
		Figure 7-29



C X 8 8	Desktop Shrink To View	C Refresh	Save Act
thing Components C*			Page > S-Drive for File Objects
earch componentsQ,	Account File 201805-0	+ Follow Edit New Contact New C	Parent Object's S-Drive Component Id
			1
ContactsToday Days on Market Estimator	Folder 1		Open in S-Drive Parent Object Title
Days on the Market			
Days on the Market Chart	Ele Details Account		Account
EinsteinVisionDashboard			Parent Object Name
Image-Based Search		File Nome	
Map		Folder 1 Created Date	Account
Mortgage Amortization Chart		2018-05-25 07:19:46	Parent Object Prefix
Mortgage Calculator		Created By	
Mortgage Calculator Card		Yasamin Doganci	
myEverythingComponent		Description	File Object Title
Opportunity Alert		File Sze	Flie Details
Picture Gallery		0 bytes	File Details
PriceRange	50 Expand		File Object Name
Property Summary			
Property Tile List			AccountFilec
Smart Home Smart Price Calculator	RELATED DETAILS	• + X CHATTER	File Object Prefix
Custom - Managed (3)	Account File Name		
Create Case With Attachments	201805-0 Account	Post Poil Question	Relationship Field Name
5-Drive for File Objects	Bon Apart Hotel	Share an update	Share Accountr
SDrive	Content Type Folder	share an uppane.	
2000 B	Polder Description	12 Q. Search this feed	♥ Set Component Visibility

Click on "Edit Page" setting to see the Lightning App Builder for the Object File Record Page.

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The required fields to be filled in are:

- Parent Object's S-Drive Component Id: If S-Drive component on parent object's record page has an Id, it should be defined here for S-Drive Component to recognize. For example: If S-Drive on Account has '1' as component id, S-Drive File component should have '1' in this field.
- 2. Parent Object Title: Title for parent object detail tab. For example: 'Account'.
- Parent Object Name: API Name of the custom object that the files will belong to. This object can also be one of the standard objects such as Solutions or Products. For example: 'MyObject_c' or 'Solution'.
- **4.** Parent Object Prefix: Namespace prefix for the parent object for the attachments. This attribute is required if the object has a namespace. For example: 'cg__'
- 5. File Object Title: Title for file detail tab. For example: 'Account File'.
- 6. File Object Name: API Name of the custom object that will represent the file. This custom file object is required to include fields indicated in the installation guide of S-Drive. For example: 'MyFile__c'.
- **7.** File Object Prefix: Namespace prefix for the file object. This attribute is required if the object has a namespace. For example: 'cg__'
- Relationship Field Name: Master-detail relation used for selected standard/custom object. For standard objects, this is Account_r, Case_r, Contact_r, etc. For custom objects, it is 'Parent_r'.

After configuring these fields, you can use your *S*-*Drive For File Object's* component to reach your S-Drive files and folders with one click of a button.

7.3 Creating Custom HTML Upload Page

You can create S-Drive HTML Upload Widget Page for custom object files (cg_S3Object_c, cg_CaseFile_c, MyExampleObject_c, etc.). This page can be used to add the S-Drive HTML





upload widget to the place wherever you want. So, you can upload your files to "S-Drive Folders" or "S-Drive Attachments" easily without opening object's page and clicking "Upload file(s)" button. To create a custom HTML upload page, follow these steps:

 Go to Setup -> App Setup -> Develop-> Pages and click the New button at the top of the page (Figure 7-31).

Visualforce	Pages					
Visualforce Pages pro	vide a robust and easy to use	mechanism to create new and exci	ting user experiences for y	our applicat	ion or to enha	nce exis
View: All Create	New View			A	B C D E	F G H
			Developer Console	New		
Action	Label	Name	Namespace Prefix	Api Version	Description	Create
Edit Security 🛃	SDrive	SDrive	cg	27.0	SDrive	<u>CBrov</u>
Edit Security	SDrive Activation	SDriveActivation	cg	27.0	SDrive Activation	<u>CBrov</u>
		Figure 7-31				

In the "Page Edit" screen you'll create your new page. Give an appropriate name to your page.
 For our example, we will use "MyCaseHtmlUploadPage" name. Type

"MyCaseHtmlUploadPage" inside Label field (Figure 7-32-a). Type "MyCaseHtmlUploadPage" inside Name field (Figure 7-32-b).

Page Edit	Save Quick Save Cancel Where is this used? Component Reference Preview
Page Information	
•	aseHtmlUploadPage a seHtmlUploadPage b
Visualforce Markup Version Settings	
1 <apex:page> 2 <!-- Begin Default Cont</th--><th>ent REMOVE THIS></th></apex:page>	ent REMOVE THIS>

Figure 7-32





You need to set the "Salesforce.com API" version to 22.0 or above to use S-Drive 2.0 features. To set the version number click the "Version Settings" tab next to the "Visualforce Markup" tab and change the version number from drop-down (See Figure 7-8).

Now we need to create our page content. We will be using custom components in our page. Basically, our page skeleton will be as follows:

```
<apex:page standardController="Case" tabStyle="Case">
        <cg:HtmlUploadComponent
            objectId="{!Case.Id}"
            customObjectFileName="CaseFile_c"
            fileNamespacePrefix="cg_"
            relationshipName="Case_r"
            privateEnabled="true"
                allowedFileExtensions="="*.avi;*.txt""
            isUsePopup="true/false"
        returnUrl="https://na6.salesforce.com/home/home.jsp"
            debug="true/false"
            currentFolderId = " a06800000xgAAEAA2"
            />
        </apex:page>
```

As an example, the following will be a typical *Visualforce page*:

```
<apex:page standardController="Case"</pre>
                                      tabStyle="Case"
  showHeader="false" sidebar="false"
  standardStylesheets="false" applyHtmlTag="true"
  applyBodyTag="true" docType="html">
<html>
    <head>
        <meta charset="utf-8" />
        <title>
            Case Files Html Upload Page
        </title>
    </head>
<body>
    <cg:HtmlUploadComponent
           objectId="{!Case.Id}"
           customObjectFileName="CaseFile c"
           fileNamespacePrefix="cg "
           relationshipName="Case r"
          privateEnabled="true"
           isUsePopup="true"
          debug="true"
```





/>
</body>
</html>
</apex:page>

You need to set these component attributes based on your configuration. Let's discuss these component attributes:

1. standardController

You need to set this standard controller to the object that you want to use with. For our example this is the custom object name: "Case". As you can see from the example we do not appended "__c" to the end of the name. This means this object is a not custom object. You can use custom objects also. For custom objects you will append "__c" at the end of the object name (e.g. ExampleObject__c). Also, do not prepend your account's namespace prefix.

2. tabStyle

This is the tab style of the page. Normally you can set it same with standardController. That means tab style will be derived from the standard controller you chose.

3. customObjectFileName

This is the name of the custom object file that existing, or we have created in previous sections or. This object will be holding the information regarding the attached files. For our example, it is "CaseFile__c". If this is a custom object you need to append "__c" to the end of the name. Also, do not prepend your account's namespace prefix.

4. objectId

You need to pass in the "**{!Id}**" value or hardcoded value for this attribute. This attribute is required to retrieve object id.

5. fileNamespacePrefix (optional)

This is the file object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you created this custom object file inside this organization, your file namespace prefix is same with your organization namespace prefix. If this file object belongs to a managed package, you need to use that managed package's namespace prefix. If your file object does not belong to any namespace you do



not need to set this attribute. If your namespace prefix is "exampleprefix" you need to set fileNamespacePrefix as "exampleprefix__".

6. privateEnabled (optional)

This option is used for enabling public/private file access to the S-Drive attachments and commonly used to limit the customer portal users' access to individual files. Before setting this property, you need to add a new field to your custom object file named 'Private' (See 'Creating Custom Object Files' section for more information). Set this attribute to true if you want to enable private/public flag. Setting the private flag on a file hides the file from customer portal users. There are two possible values for this attribute: **"true", "false"**. The default for this attribute is "false" except for the Case Files custom page.

7. allowedFileExtensions (optional)

You can use this option, if you want to limit the file types to be uploaded into selected object's S-Drive attachments and folders. Semicolon separated list of file extensions that are allowed to upload. This attribute is optional and leaving this empty will allow all kind of files to be uploaded. For example: "*.jpg;*.txt" will limit the files to be uploaded to jpg and txt files.





8. relationshipName (optional)

Master-detail relation used for selected standard/custom object. This attribute is optional and default value is "Parent__r".

9. currentFolderId (optional)

Id of the parent folder for the files to be uploaded. It is not provided by default.

10. isUsePopup (optional)

Set this attribute to true if you defined useUploadAsPopup attribute to true on the AttachmentComponent. The default for this attribute is false. This value overrides the "Default Upload Manager" configuration in "S-Drive Configuration".

11. returnUrl (optional)

Set this attribute to a url to be directed this return page after closing upload screen.

12. debug (optional)

Set this attribute to true to enable logs debugging on bottom of upload screen. The default for this attribute is false.



You can add & *debug=true query* parameter on the URL of upload page to enable log debugging.

If you want to get more information about component attributes, you can click "**Component References**" button and find **cg:HtmlUploadComponent** reference from the list (Figure 7-32-d).

After setting the page based on above component attributes, click "Save" button.

Lastly set the security for your page on other profiles. Go to **Setup -> App Setup -> Develop -> Pages** and click **Security** link next to your page name (Figure 7-33).

 Action
 Label
 Name
 Namespace Prefix
 Api Version
 Description

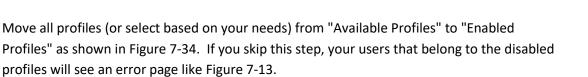
 Edit
 Del Security IP
 MyCaseHtmlUploadPage
 MyCaseHtmlUploadPage
 cg
 33.0

 Figure 7-33



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Enable Profile Access for Visualforce Page MyCaseHtmlUploadPage Save Cancel Available Profiles Enabled Profiles Vone-Add Contract Manager Cloned Standard Platform User Cloned System Administrator Cloned System Administrator Cloned System Administrator Cloned System Administrator Cloned Standard Platform User Cloned System Administrator Cloned Standard Platform User Cloned Standard Platform User Cloned Standard Platform User Cloned Standard Platform User Custom: Support Profile Custom: Support Profile Customer Community Login User Customer Portal Manager Marketing User Partner Community Login User

Figure 7-34

Now we have a custom HTML upload page. At this point, you can use this HTML upload page wherever you want like below figure (Figure 7-35) if you give appropriate parameters.

© 00002034					Customize Page Printable View Help for this
		Case Files [21] Solutions [0]	Emails [18] Attachments [0] Open Activities [0] Activity Histor	<u>([19] Ca</u>	se History [1]
Case Detail		Edit Delete	Close Case Clone Case Files Case Html Upload		
Cas	e Owner	CyanGate CyanGate [Change]	Stat	is New	
Case	Number	00002034	Prior	ty Mediu	um
Conta	ct Name		Contact Pho	ne	
Accourt	nt Name		Contact Em	ail	
	Туре		Case Orig	in Email	l
Case	Reason				
Date/Time	Opened	12/20/2013 4:37 AM	Date/Time Clos	ed	
	Product		Engineering Req Numb	er	
Potential	Liability		SLA Violatio	n	
Cre	eated By	CyanGate CyanGate, 12/20/2013 4:37 A	M Last Modified	By <u>Cyan</u>	Gate CyanGate, 12/20/2013 4:37 AM
	Subject	Test			
Dee	orintion				

Figure 7-35



8 S-DRIVE CONFIGURATION TAB

Organization administrators can use S-Drive Configuration tab to set organization-wide configurations and get information about S-Drive credentials, usage and billing.

You can refer to "*B. Displaying "S-Drive" and "S-Drive Configuration" Tabs*" section of "S-Drive Installation Guide" to display "S-Drive Configuration" tab in your custom app.

S-Drive Configuration is separated into six sections: S-DriveAuthentication Settings, General Settings, Customization Settings, Micro Services, S-Drive Documentation and Video Tutorials (Figure 8-1).

ome Chatter	r Files	Accounts	S-Drive	S-Drive Configur	ation \$30t	ects Cas	es Contacts	Opportunities	Campaigns	Reports	Leads	My Example Object	s S-Drive Mobi	le 🔸	•	
S-Drive Config	guration				Save	Cancel										
S-Drive Auth	entication	Settings	G	eneral Settings	0	ustomizatio	n Settings	Micro	Services	Y	S-Drive D	Documentation	Video 1	utorials		
Amazon S	S3 Crede	entials														
		Bucket Na	ame 🥥 mys	driveawsbucket		11										
Update Am Key, Se	azon S3 Cre ecret Key) a	edentials(Acc and Bucket Na	ess <u>Click</u> ame <mark>()</mark>	here to update												
S-Drive P	ortal Cre	edentials														
S-Drive	Account, l	Jsage and Bil Informa		here to access S-Drive	Portal											
					Save	Cancel										

Figure 8-1

8.1 S-Drive Authentication Settings

8.1.1 Amazon S3 Credentials





Amazon S3 Credentials Bucket Name Update Amazon S3 Credentials(Access Key, Secret Key) and Bucket Name Block Bucket Public Access Block Bucket Public Access



8.1.1.1 Bucket Name

Amazon bucket name used for S-Drive is displayed here.

8.1.1.2 Update Amazon S3 Credentials (Access Key, Secret Key) and Bucket Name

Users can display and update their Amazon S3 credentials and bucket name. See section **2.1.1** Access Key and Secret Key for more details.

8.1.1.3 Block Bucket Public Access

If users created new a new S3 bucket during the first S-Drive configuration, their buckets are public by default. To change the S3 bucket access settings to private, click on this button.

8.1.2 S-Drive Portal Credentials

8.1.2.1 S-Drive Account, Usage and Billing Information

Users can access their S-Drive portal account for account, usage and billing information.

8.2 General Settings

This section allows a system administrator to change several system wide configuration options.





-Drive Configuration	Sove Cancel
S-Drive Authentication Settings General	Settings Customization Settings Micro Services Subrive Documentation Video Tutorials
S-Drive Tab Settings	
Enable Download	2.8
Enable Chatter) e
Disable Copy URL on S-Drive Tab	
Enable Email on S-Drive Tab 🗭	disable for portal users
Mail Settings	
Custom Email Footer	Default Email Footer
Default Email Expiration Time	Unlimited minute(s) *
Embed Thread Id In Case Emails	
Case Email Reply-To Address	
Object Field Settings	
Update S-Drive objects to set new fields	Click here to update S-Drive objects
Sync File Object Fields	Sync.
File Settings	
Max File Size in MBs (Uncheck to remove file size limit)	Unlimited File Size
Enable File Activities	
Select page size for S-Drive tab	
11	
User Settings	
	Check this option for opening a file after clicking on it, and uncheck for preview.
Restricted Portal User Profiles	
Only Allow Users with Modify All Permissions to Create Items at the Top Level	
Restrict Sharing Categories for Community users	Customer Portal Users.Porta
Url Settings	
Copy Url expiration date	20 year(s)
Upload Settings	
- The part of the second	Mark this checkbox if you want the upload process to start automatically.
	Mark this checkbox in order to enable dropzone.
Enable Version Upload	
Default Upload Manager	V Html •
Tag Settings	
Banned Tags	Enfer banned tags here and seperate them with comma: e.g. bannedtag1, bannedtag2
	ame denote any new with experime and it must be used and grave and any set of the set of
Other Settings	
Daily batch jobs execution time	04:48 AH
Converting Leads to	Contacts 🗟 Accounts 🕅 Opportunities 🗟
	Seve

Figure 8-3

8.2.1 S-Drive Tab Settings

8.2.1.1 Enable Download

This configuration enables "Download", "Open" and "Zip & Download" for S-Drive Folders.

8.2.1.2 Enable Chatter

This configuration enables Chatter feature for S-Drive folders.





8.2.1.3 Disable Copy URL on S-Drive Tab

This configuration is used to disable Copy URL item menu action for S-Drive tab ("S-Drive Folders"). Default is enabled (unchecked).

8.2.1.4 Enable Email on S-Drive Tab

This configuration is used to enable Email feature for S-Drive tab ("S-Drive Folders"). Default is enabled (checked).

8.2.1.5 Disable for portal users

This configuration is used to disable email feature only for portal users if it is enabled for internal users. So, if it is disabled for all users ("Enable Email on S-Drive Tab" is checked), it cannot be checked/unchecked.

8.2.2 Mail Settings

8.2.2.1 Custom Email Footer

This configuration will allow a system administrator to change the system wide S-Drive Email footer. The default email footer that is added to your email messages is "Attachment is stored online at S-Drive. To open this file, just click the link above."

8.2.2.2 Default Email Expiration Time

This configuration will allow a system administrator to change the system wide S-Drive Default Email Expiration Time. If you do not set this value "Never Expires" is selected by default in the email screen. If you set a value, it will be displayed to all users that are using email screen (Figure 8-4). Users can always modify the email expiration time while sending the emails.





	Clear
Additional To	
сс	
BCC	
Attachment Expirat	tion: Never Expires 30 minute(s) V
1 attachment 🕨	minute(s)
	hour(s)
	day(s)
Subject:	month(s)
Message Body:	year(s)
	Figure 8-4

8.2.2.3 Embed Thread Id in Case Emails

By setting this configuration, it adds thread id into the email of the case file. So, replies to that e-mail message are recorded in the Activity History of the same case and attachments in the replies are saved in the same case. This configuration is useful for the organizations that are using S-Drive Email Agent.

8.2.2.4 Case Email Reply-To Address

Reply-to address for case related emails sent out via S-Drive. Usually this email address is the general support email address. This configuration is useful for the organizations that are using S-Drive Email Agent.

8.2.3 Object Field Settings

8.2.3.1 Sync File Object Fields

This button is for syncing Salesforce File Object fields for S-Drive version upgrades. Instead of creating each field on S-Drive upgrades, this button creates the missing fields for your file objects you use for S-Drive.

When upgrading to new version of SDrive, sometimes there are fields added to file objects for new feature of SDrive platforms. Instead of adding these fields manually, SDrive supports this process automatically. When upgrading to 2.x from any version,





custom file objects will have the missing fields added for you just after clicking the sync button.

For this feature to be available, you must configure remote site settings.

Go to Setup -> Security -> Remote Site Settings and create a new remote site named anything let's say "SDriveMeta" and copy your organization domain for example as: "https://cgsdrive-dev-ed.my.salesforce.com".

8.2.4 **Orphaned Files Settings**

When a file is uploaded to S-Drive, the file is stored in your AWS S3 bucket, and a corresponding S-Drive record is created in Salesforce that contains information about that file. Sometimes the S-Drive record is accidentally deleted (such as from a list view), but the file still exists in S3. These files don't show up in S-Drive.

The **Sync Orphaned Files** feature corrects this problem by creating an S-Drive file for all files in your AWS S3 bucket that don't have a record in S-Drive.

When the button is clicked, all orphaned files are restored to the parent record at the root level.

If the parent object record Id of a file isn't found (i.e. An account of an account file), the file will be restored to S-Drive Tab.

Warning: If you have multiple orgs that share a bucket, files that belong in one org will be considered orphans in the second org and will be "restored."

8.2.5 File Settings/File Activities

8.2.5.1 Max File Size in MBs

This configuration will allow a system administrator to change the system wide behavior of max file size limit for uploads. File size limit is actually 5TB per file; however, due to Flash plug-in and browser limitations, the practical limit for file upload size via the browser is 2GBs. With this option, the user will be limited to a file size for each file. So, if you set maximum file size to "10". Users won't be able to upload files greater than 10 MBs.





You need to set this option in megabytes (MB). So if you want to limit the size to 12 MB, Max File Size option must be 12. If you want to set it to 1 gigabyte (GB), you need to set it to 1024, if you want it to be 0 byte, you need to set it to 0 etc. If you don't want to specify a file size limit, uncheck the checkbox.

If users try to upload a file greater than the limit, they will see an error message like below saying "Files greater than XYZ cannot be uploaded! (File name, File size) (Figure 8-5):

Er	ror
	Files greater than 2.00 MB cannot be uploaded. Please contact your system administrator for the file size limits! (Open Text Media Management 7.0.3 Installation Guide.pdf, 6.54 MB)
	ОК
	Figure 8-5

Note that this option is account-wide. So, this setting will be applied to all S-Drive Attachments and S-Drive Folders. Users won't be able to upload files greater than allowed file size limit. Also note that this won't affect previously uploaded files.

8.2.5.2 Enable File Activities

File Activities feature is a way to track the user activities on all file records in S-Drive. Actions such as Download, Open, Copy URL are stored in File Activities objects and can be easily tracked inside S-Drive or with Salesforce Reports. They can be configured for different types of activities separately for your S-Drive file objects. The user and activity time are also recorded as well as the activity type and additional details if there are any.

Note: Enabling File Activities will consume data storage on your Salesforce organization.

In "File Settings" section, see "Enable File Activities" picklists.





Max File Size in M	IBs (Uncheck to remove file size limit) 🔲 🥝	nlimited File Size		
	Enable File Activities 🤌	Account File	Available Activities Download Generate SUrl Open Preview-Expand Preview-Detail New Version Email Sent Share	Selected Activities Copy URL Zip and Download Download SUrl File Lock Service Upload

Figure 8-6

The dropdown list shows all object files for objects using S-Drive. (See Note below if your file object is not on the list.) Choose the object file to configure from the dropdown list. Then select the activities you want recorded by moving them from Available Activities to Selected Activities. Click Save at the top or bottom of the page, then repeat for other object files you wish to use File Activities on.

The list of available file activities are as follows:

- Download
- Download SUrl
- Generate SUrl
- Open
- Copy URL
- Zip and Download
- Preview-Expand
- Preview-Detail
- Upload
- New Version
- Email Sent
- File Lock Service
- Share

Note that for Custom Objects, if the file object is not present in the above picklist, please create a lookup relationship in **File Activity** object with that the desired S-Drive file object. You can create the relationship from Setup > Objects > File Activity > Scrolling to "Custom Fields & Relationships" section > Clicking on "New" button >





Select "Lookup Relationship" and select your desired file object as "Related To" from the picklist provided.

	Activity ard Fields (4) Custom Fields & Re	lationships (12) Validat		Field Sets [0] Compact Layouts [1] bex Sharing Recalculation [0] Object L
Custo	om Object Definition Detail		Edit Delete	
	Singular Label	File Activity		
	Plural Label	File Activities		
	Object Name	File_Activity		
	Namespace Prefix	cg		
	API Name	cg_File_Activity_c		
Standa	Created By	<u>User User</u> , 1/6/2020,	2:30 AM	
		<u>User User</u> , 1/6/2020,	2:30 AM Field Name	Data Type
	ard Fields	<u>User User</u> , 1/6/2020,		Data Type Lookup(User)
Action	ard Fields Field Label	<u>User User</u> , 1/6/2020,	Field Name	
	Fields Field Label Created By	<u>User User</u> , 1/6/2020,	Field Name CreatedBy	Lookup(User)
Action	ard Fields Field Label Created By File Tracking Number	<u>User User</u> , 1/6/2020,	Field Name CreatedBy Name	Lookup(User) Auto Number
Action Edit Edit	Ard Fields Field Label Created By Eile Tracking Number Last Modified By	<u>User User</u> , 1/6/2020,	Field Name CreatedBy Name LastModifiedBy	Lookup(User) Auto Number Lookup(User) Lookup(User,Group)
Action Edit Edit	ard Fields Field Label Created By File Tracking Number Last Modified By Owner	<u>User User</u> , 1/6/2020,	Field Name CreatedBy Name LastModifiedBy Owner Field Dependen	Lookup(User) Auto Number Lookup(User) Lookup(User,Group)
Action Edit Edit	ard Fields Field Label Created By File Tracking Number Last Modified By Owner m Fields & Relationships Field Label		Field Name CreatedBy Name LastModifiedBy Owner Field Dependen Da	Lookup(User) Auto Number Lookup(User) Lookup(User,Group)
Action Edit Edit Custor Action	ard Fields Field Label Created By File Tracking Number Last Modified By Owner Fields & Relationships Field Label Field Label Cel Account File	API Name	Field Name CreatedBy Name LastModifiedBy Owner Field Dependen Da C Lo	Lookup(User) Auto Number Lookup(User) Lookup(User,Group) cies ta Type

Figure 8-7

8.2.6 User Settings

8.2.6.1 Change File Click Behavior

This configuration is used to enable users to choose the action after a file is clicked on. Check the checkbox to open a file after it is clicked on, uncheck it to preview a file after it is clicked on.

8.2.6.2 Restricted Portal User Profiles

These are Salesforce.com user profiles that are specifically for portal users. User profiles can be "Standard", "Partner", "High Volume Portal", "Customer Portal User",





"Customer Portal Manager" and must be separated by comma. By specifying a profile in this configuration, you can prevent access to "private" content for these profiles.

8.2.6.3 Only Allow Users with Modify All Permissions to Create Items at the Top Level

This configuration is used to only allow users with "Modify All" permissions (mostly system administrators) to create items at the top level (Home). If this is unchecked all users can create files/folder at the top-level if they have enough permissions. If this is checked standard users won't be able to see "Create Folder" and "Upload File(s)" buttons in the "Home" page of "S-Drive Folders".

8.2.6.4 Restrict Sharing Categories for Community User

You can modify the sharing rule categories that are displayed in the Share Page, for Community Users. Types can be "Customer Portal Users", "Portal Roles", "Portal Roles and Subordinates", "Public Groups", "Roles", "Roles and Internal Subordinates", "Roles, Internal and Portal Subordinates", "Users" and must be separated by semicolon. An example input is: Customer Portal Users;Portal Roles

8.2.7 URL Settings

8.2.7.1 Copy URL Expiration Date

This configuration is for setting the expiration date of created URL of file. You can give static date (i. e. 3 years) or you can select 7 years document retention rule that is accessible for 7 years from the file created date.

8.2.8 Upload Settings

8.2.8.1 Enable Auto Upload

This configuration is used to enable Auto Upload files without clicking Upload button in file upload window. Check the checkbox to enable this feature.



If there is a required field in one of your objects, auto upload will be disabled. For this setting to work properly, you must refresh all displayed fields and add the required fields to Displayed Fields from Customization Settings.





8.2.8.2 Enable Version Upload

This configuration is used to activate versioning. After enabling versioning, S-Drive will allow you to upload different versions of files. You will be able to see and manage the versions of your files. *Please note that once versioning is enabled, you can't disable.*

8.2.8.3 Default Upload Manager

This configuration is used to set the default upload manager for the whole organization. Possible values are "**Html**", "**Html with Popup**" (Figure 8-6). Default value is "Html".



Flash and Java upload has been deprecated in S-Drive with 2.0.

Default Upload Manager 🥝 Html 🗸 🗸	
Disable Copy URL on S-Drive Tab 🥑 Html with Popup	
Copy Url expiration date 🥝 20 year(s) 🗸	
Enable Version Upload 🥝 Version Enabled	

Figure 8-8

8.2.9 Tag Settings

8.2.9.1 Moving Tags from Hidden to Displayed Fields: Go to S-Drive Configuration>Customization Settings.





Prive Configuration		Save Cancel				
Drive Authentication Settings	General Settings	Customization Settings	Micro Services	S-Drive Documentation	Video Tutorials	1
isplay Object Fields						
his section allows a system administrator to ou can add several custom fields to the ob or more information please check <u>S- Drive</u>	iect file and customize your attach	ments screen columns based on you	rs objects. custom fields.			
STEP 1:	STEP 2: Availab	le Fields of Selected Obj	ect			
	Hidden Fields	Displayed Fields				
		File Name Created Date				
	Last Modified By ID	Created By ID				
Account File	Last Modified Date Page Count	Description File Size				
	Private	•				
	Record ID Sync Id					
	System Modstamp	•				
	inda	· ·				
ustom Object S-Drive Config						
Understein Content Obland C. Daine Confer		an de the deflections				
Under the Custom Object S-Drive Config Object List: Objects of the organization e	scent for custom file objects are list	sted in the list				
Related Objects: Any related object to th Custom File ObjectName: User is suppo Generate File Object: Used to create a c	sed to input the name of the file of	biect.	o related object the table will be show	n empty.		
	ustom file object which is related to	o the object selected in object list .				
Object List						
Search for Object	Search					

Figure 8-9

On Display Object Fields section, choose the Account File object. (or the object that you want to use Tags feature)

Move *Tags* field from Hidden Fields to Displayed Fields.

rive Configuration		Save				
Drive Authentication Settings	General Settings	Customization Settings	Micro Services	S-Drive Documentation	Video Tutorials	
splay Object Fields						
u can add several custom fields to th	ator to change field display settings of S- ne object file and customize your attachm Drive Advanced Configuration Document	ents screen columns based on your	s objects. custom fields.			
STEP 1:	STEP 2: Available	Fields of Selected Obje	st			
	Hidden Fields	Displayed Fields				
	Account Account File Name Deleted Last Modified By ID	File Name Created Date Created By ID Description				
Account File •	Last Modified Date Page Count Private Record ID Sync Id System Modstamp	File Size				
tom Object S-Drive Confid	1					
bject List: Objects of the organizat elated Objects: Any related object istom File ObjectName: User is s enerate File Object: Used to creat	nfig part of the page, user is expected to ion except for custom file objects are list to the selected one on will be displayed i upposed to input the name of the file obj e a custom file object which is related to i	d in the list. elated objects table, if there were no sct.	related object the table will be sho	own empty.		
Object List						
Search for Object	Search					
Account						
Account Contact Role Account Feed						
Account History						

Figure 8-10

Click Save button, and you are ready to use Tags feature. See the <u>S-Drive User's Guide</u> for more information on using the Tags feature.





Activity History	Albert Einstein.jpg						××			
Action Subject	Details	Chatter						Last Modified Date/Time		
Edit Del Email: asdasd								05.08.2019 19:22		
Edit Del Email: denemee			A REAL	6	File Name:	Albert Einstein.jpg		05.08.2019 18:27		
Notes & Attachments					File Type:	image/jpg				
Action Tyj		and the second	and the second		Created Date:	06.08.2019 11:35		Created By		
Preview Download Del File		and the second sec	The second	100	Created By ID:	Kadir Gültekin		Kadir Gültekin		
Preview Download Del File		10000		ALC: ST		radin outotan		Kadir Gültekin		
Preview Download Del File		1498 C	1-12-0	20000	Description:			Kadir Gültekin		
Preview Download Del File		State of the second	200	500 NG2	File Size:	47.07 KB		Kadir Gültekin		
Partners		Sel 1			Tags:	modern physics				
No records to display		22/00/7/1			Tayo.					
~ Back To Top		Sala /-		Com						
Account Files		and the	A STORE	5						
7				2						
		-10 M (2)		1.000						
Home	19	Designation of the	Later ward and	ALC REAL				1 items in 1	page (Search	Q)
	100		A AND A	*					=	
Actions								File Size	Tags	,
				Spen	🛓 Download 🛛 🗹	Copy URL I 🖉 Edit 🕼 Rename	il] Delete	47.07 KB	modern physic	:S
1	L								1 item	ns in 1 page

Figure 8-11

8.2.9.2 Banned Tags:

Enter tags here to ban them from being used to tag files and folders on S-Drive. Separate banned tags with commas as you enter them, as shown below.

Tag Settings	
Bannec	fags 🕗 bannedtag1.bannedtag2
	Ø bannedtag1 Ø bannedtag2

Figure 8-12

After specifying the banned tags, if a user tries to enter a banned tag they will get see a message that the tag has been banned by the system administrator as shown below.





25 S-Drive		Warning Following tags could not be added tince they are banned by your administrator: bannedtag1	Search	Q
A D				myDrive
> 📴 Folder Test	HOME > SCIENTISTS > ALBERT EINSTEIN.JPC			
> Scientists	Albert Einstein.jpg		ਿ	💾 Save 🗲 Back
	Outer (a) Aust	Fie Azne Azera Enstein (g Decreption ■ Enter a new tag and press return ■ There y of general matching @		

Figure 8-13

8.2.10 Other Settings

8.2.10.1 Select SQueue - Daily Batch Jobs - Execution Time

SQueue is a an S-Drive service that executes batch jobs at 00:00 automatically if there are any. You can change execution time of batch jobs in this section. Check your Salesforce system time to set this value. You can check your default system time from **Setup > Company Settings > Company Information > Default Time Zone**. Daily batch jobs execute both the deletion of previews of the files having multiple pages, and the copying of files during the lead conversion process.

Daily batch jobs execution time 00:00

Figure 8-14

Note: If files have **shortcuts**, they will be put in the SQueue until the batch job execution time and shortcuts belonging to deleted files will be deleted when the batch job runs. However, this only occurs when the shortcuts are on file objects that have the "Allow Search" box checked. If "Allow Search" is not checked, the shortcuts will not be automatically deleted and they will no longer work. To find the "Allow Search" checkbox, go to Setup \rightarrow Object Manager, find your file object and click Edit. It is at the bottom of the page under Search Status.





8.2.10.2 Enable Copying S-Drive Files and Folders When Converting Leads To

This configuration is used to enable users to choose where to copy S-Drive files in Leads when a lead is converted. Available options are Accounts, Contacts and Opportunities. See Section 9.3 Lead Conversion for details.

Enable copying S-Drive Contacts 🗹 Accounts 🗹 Opportunities 🗐 files and folders when Converting Leads to 📀

Figure 8-15

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8.3 **Customization Settings**

In this section, you can configure your field display settings and create custom S-Drive file objects.

Prive Configuration	Sav	Cancel	
-Drive Authentication Settings	General Settings	Customization Settings	Micro Services
ou can add several custom fields to the	object file and customize your att	of S-Drive Attachment and S-Drive Folde achments screen columns based on your	
STEP 1: Account File		oved didate npted y ID late	ject
Ustom Object S-Drive Config Object List: Objects of the organizati Related Objects: Any related object t Custom File ObjectName: User is su Generate File Object: Used to create Object List Account Account Contact Role Account Feed Account History Account Partner Account Share Activity History Additional Directory Number Aggregate Result Apex Class	o the selected one on will be displa pposed to input the name of the fil	ayed related objects table, If there were n e object.	o related object the table will
		Related	Objects
		Custom File ObjectName(Generate F	ile Object

Figure 8-16





8.3.1 **Display Object Fields**

This section allows a system administrator to change field display settings of S-Drive Files and S-Drive Tab objects. By default, the S-Drive file areas of all objects have these columns: "File Name", "Created Date", "Created By ID", File Size", "Description" (Figure 8-15).

/ly E	xample Object Files	New Folde	Upload File(s)	Attach from S-Drive Folders	Email Selected Delete Sel	lected Download M	anager
ome	1						Search
	Actions	File Name		Created Date	Created By ID	File Size	Description
	Download Copy URL Edit Del	My Test File.txt		8/9/2011 8:11 AM	CyanGate CyanGate	21 bytes	

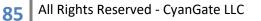


To set the field display settings for an object, select the object from drop-down. Select the fields from "Available Fields" and click right arrow button to move these fields to the "Displayed Fields" section. You can also change the order of the fields by using Up-Down arrows. Click "Save" button to save changes. (Figure 8-16). Note that you cannot change the first column of the file list, it is fixed as the "File Name" field.

Note: If you allow users to set files to Private, you must display the Private field here.

S-Drive Configuration		Save	
S-Drive Authentication Settings	General Settings	Customization Settings	
	the object file and customize y	ettings of S-Drive Attachment and S-Dri our attachments screen columns based <u>1 Documentation.</u>	
STEP 1:	STEP 2: Availabl	e Fields of Selected Objec Displayed Fields	t
Account File	Account Account File Name Deleted Is Archive Approved Is Archive Candidate Is Archived Is Archive Exempted Last Modified By ID Last Modified Date Page Count	File Name Created Date Created By ID Description File Size	
	Figure 8-18		

Note that you can configure custom fields for S-Drive Folders (S3Object) after v2.0.







You should see the "You have successfully saved configuration changes!!!" message at the top of the S-Drive Configuration page (Figure 8-17).

S-Drive Configuration	Save Cancel	
You have successfully saved configuration	n changes!!!	
S-Drive System Information		
		Figure 8-19

Now if you go to your custom object's page, you should see the displayed fields are changed (Figure 8-18).

My Example Object Files		New Folder	Upload File(s)	Attach from S-Drive	FoldersEma	il Selected	elete Selected	Download Manager	
Home	1.2							Search	Q
Actions	File Name			TestDate	TestURL	Test	Checkbox	TestCurrency	
Download Copy URL Edit Del	My Test File.b	₫				0			

Figure 8-20

Widgets will be displayed based on your selection in the upload screen (Figure 8-19):

ile	TestDate	Tes	tURL					TestCheckbox	TestCurrency	Status
esting.txt	08/09/2011	•	Aug	ust	2	011	►	\checkmark	34	
		s	и т	w	т	F	s			
			1 2	з	4	5	6			
		7	3 9	10	11	12	13			
		14 1	5 16	17	18	19	20			
		21 2	2 23	24	25	26	27			
		28 2	9 30	31						

Figure 8-21

And if you edit the files, you will also see the correct widgets based on the types of the fields (Figure 8-20):

86





My Example Object Detail		Edit Delete Clone			_		
	Edit						
My Example Object Name	-						
Account	TestDate	8/9/2011 [<u>8/9/2011</u>]					
ExampleEmail	TestURL						
Created By	TESTORE	www.cyangate.com			odified By <u>CyanGate Cya</u>	anGate, 11/24/2010 6:57	7 AM
	TestCheckbox						
	TestCurrency	34.00					
			Save (Cancel			
My Example Object Files					Email Selected Delete Se	elected Download Ma	nager
Home							
Actions	File Name		TestDate	TestURL		TestCheckbox	TestCurrency
Download Copy URL Edit Del	My Test File.	xt					
Download Copy URL Edit Del	Testing.txt		8/9/2011	http://ww	w.cvangate.com	✓	\$34.00

Figure 8-22

8.3.2 **Custom Object S-Drive Config**

This is used to generate an S-Drive file object for an object other than Account, Case, Contact, Opportunity or Lead. Those come standard with S-Drive. To use S-Drive with any other standard or custom object, you must create a corresponding S-Drive file object. This can be done here with one click.





8.4 Micro Services

S-Drive Authentication Set	ings	General Settings	Y	Customization Settings	M	cro Services	S-Drive Doo
Amazon S3 Transfer	Accelerat	tion (Free on S-Drive)				
Enabling Amazon S3 Trans acceleration.html	fer Accelera	tion is free from the S-Drive	e side but the	ere is a pricing plan on the Ama	azon side. Pleas	se visit the site fo	r the pricing. <u>https://docs.a</u>
Enable Amazon S Ac	3 Transfer celeration	Ø					
Zip and Download (F	ree)						
This configuration is enable	d for "Downl	oad", "Open" and "ZipDow	nload" for S-I	Drive Folders.			
Attachment Sync (Fre	ee)						
This configuration is for syn	cing Salesfo	rce Attachments of any sta	indard/custor	m object with S-Drive. After en	abling Attachme	ent Sync, new att	achment will be uploaded t
Sync Salesforce Attachmen	ts with \$- Drive	Configure AttachmentSync					
S-URL(Free)							
	d by Amazo	e 62 conviore are teo long					
			eature on Ś-E	oblems in some mail programs Drive. In order to use Sharing S D			
Enable S-Action(Free) You can create and add you	RL section fo	r enabling the short URL fe Base URL http://sdrive-dev	eature on Ś-E /eloper-editio	Drive. In order to use Sharing S	S-Drive files in F		
Enable S-Action(Free)	RL section fo	r enabling the short URL fe Base URL http://sdrive-dev	eature on Ś-E /eloper-editio	Drive. In order to use Sharing S	S-Drive files in F		
Enable S-Action(Free) You can create and add you Add S-Action Add S-Action	RL section fo	r enabling the short URL fe Base URL [http://sdrive-dev tions to S-Drive, Please se	eature on Ś-E /eloper-editio	Drive. In order to use Sharing S	S-Drive files in F	ublic Site feature	e, you need to enable Sho
Enable S-Action(Free) You can create and add you Add S-Action Add S-Action	RL section fo	r enabling the short URL fit Base URL http://sdrive-dev tions to S-Drive. Please se Name	eature on Ś-E /eloper-editio	Drive. In order to use Sharing S	S-Drive files in F	ublic Site feature	e, you need to enable Shor Display
Enable S-Action(Free) You can create and add you Add S-Action Add S-Action	RL section fo S-URL 🗭 Ir custom ac Delete Edit	r enabling the short URL fit Base URL [http://sdrive-dev tions to S-Drive. Please se Name selectAll	eature on Ś-[veloper-editions of the second s	Drive. In order to use Sharing S ation to get details: <u>http://www.s</u> Label Select All Fields	S-Drive files in F	Multiple	e, you need to enable Shor Display Hidden
Enable S-Action(Free) You can create and add you Add S-Action Add S-Action (((((((((((((((((((RL section fo S-URL I r custom ac Delete Edit Delete Edit Delete Edit	r enabling the short URL fit Base URL [http://sdrive-dev tions to S-Drive. Please se Name selectAll lightning	eature on Ś-[veloper-editions of the second s	Drive. In order to use Sharing S ation to get details: <u>http://www.s</u> Label Select All Fields lightning	S-Drive files in F	Multiple	e, you need to enable Shor Display Hidden Lightning Component
Enable S-Action(Free) You can create and add you Add S-Action Add S-Action	L section fo S-URL ♥ Ir custom ac Delete Edit Delete Edit Delete Edit Delete Edit all (Paid) , click on "Cr eview and th sview and th sview and th so that so	r enabling the short URL fit Base URL http://sdrive-dev tions to S-Drive. Please se Name selectAll lightning classic displa classic displa	e documente veloper-editio e documente v v nbnail' buttor ject. e type.	Drive. In order to use Sharing S ation to get details: <u>http://www.s</u> Label Select All Fields lightning classic n. Using this configuration;	S-Drive files in F	Multiple	e, you need to enable Shor Display Hidden Lightning Component
Enable S-Action(Free) You can create and add you Add S-Action Add S-Action ((Preview and Thumbn To enable this configuration * You can enable/disable pr * You can enabl	L section fo S-URL ♥ Ir custom ac Delete Edit Delete Edit Delete Edit Delete Edit ail (Paid) c click on "Cr eview and th version and thumbr	r enabling the short URL fit Base URL http://sdrive-dev tions to S-Drive. Please se Name selectAll lightning classic displa classic displa	e documente e documente v nbnail" buttor oject. e type. Attachments	Drive. In order to use Sharing S ation to get details: <u>http://www.s</u> Label Select All Fields lightning classic n. Using this configuration;	S-Drive files in F	Multiple	e, you need to enable Shor Display Hidden Lightning Component
Enable S-Action(Free) You can create and add you Add S-Action Add S-Action Preview and Thumbon To enable this configuration You can enable/disable pr You can enable/disable pr You can generate preview You can generate preview	L section fo S-URL ♥ Ir custom ac Delete Edit Delete Edit Delete Edit Delete Edit ail (Paid) c click on "Cr eview and th version and thumbr	r enabling the short URL fit Base URL http://sdrive-dev tions to S-Drive. Please se Name selectAll lightning classic display onfigure Preview and Thum numbnail conversion per ob umbnail conversion per fil fortery failed conversions. ail of pre-existing S-Drive /	e documente e documente v nbnail" buttor oject. e type. Attachments	Drive. In order to use Sharing S ation to get details: <u>http://www.s</u> Label Select All Fields lightning classic n. Using this configuration;	S-Drive files in F	Multiple	p, you need to enable Shor Display Hidden Lightning Component



8.4.1 Enable Amazon S3 Transfer Acceleration

This configuration is used to enable/disable S3 Transfer Acceleration feature. Amazon S3 Transfer Acceleration is a faster way to move data into your Amazon S3 bucket over the internet. It is designed to maximize transfer speeds when you need to move data over long





distances, for instance, across countries, or continents to your Amazon S3 Bucket. Transfer Acceleration takes advantage of Amazon CloudFront's globally distributed edge locations. As the data arrives at an edge location, data is routed to Amazon S3 over an optimized network path.

Enable Amazon \$3 Transfer Acceleration 🥥 📝
Figure 8-24

You might want to use Transfer Acceleration on a bucket for various reasons, including the following:

- You have customers that upload to a centralized bucket from all over the world.
- You transfer gigabytes to terabytes of data on a regular basis across continents.
- You underutilize the available bandwidth over the Internet when uploading to Amazon S3.

When you enable Amazon S3 Transfer Acceleration using S-Drive Configuration Tab, it will also be enabled in Amazon Web Services and you will have a new S3 bucket endpoint in the form "BUCKET_NAME.s3-accelerate.amazonaws.com". Afterwards, S-Drive starts using this endpoint for uploads and downloads. You can see the transfer acceleration at bucket properties, and you can enable/suspend S3 Transfer acceleration using AWS Management Console. But whatever the status is your acceleration endpoint in your bucket, it must be the same in S-Drive. We recommend you, enable/suspend acceleration endpoint only using S-Drive. To see this bucket property, click on S3 service and then click on your bucket name from AWS Console and click on "Properties" tab at top right corner (Figure 8-23).





	Q Search by prefix	None	Properties	Transfers
Bucket: mysdriveawsbucket				
 Permissions 				
 Static Website Hosting 				
▹ Logging				
▹ Events				
▹ Versioning				
▶ Lifecycle				
 Cross-Region Replication 				
▶ Tags				
▶ Requester Pays				
 Transfer Acceleration 				
Enabling Amazon S3 Transfer Acceleration on this bucket will from and to Amazon S3. Unlike data transfers using regional endpoint will incur an additional fee.				
Endpoint: mysdriveawsbucket.s3-accelerate.amazonaws.com				
Suspend				
Want to compare your data transfer speed by region?				

Figure 8-25



When using Transfer Acceleration, additional charges may apply for transfer where Transfer Acceleration can potentially improve performance. For more information about pricing, see <u>Amazon S3 Pricing</u>. S-Drive won't charge you for this service.

Only HTML Upload Manager supports Amazon S3 Transfer Acceleration. When you enable acceleration endpoint, it will be used for both downloads and uploads in S-Drive. To learn more about S3 Transfer Acceleration, please visit <u>here.</u>

8.4.2 **Zip and Download**

This configuration is enabled to Download and Open files. Multiple files can be selected and downloaded by Zip Download functionality.





8.4.3 **File/Attachment Sync**

File/Attachment Sync takes files that are uploaded to Salesforce Files or Salesforce Attachments and syncs them with S-Drive for the selected object. Sync is processed based on a queue, so new items will appear in S-Drive in a few seconds/minutes.

After configuring File/Attachment Sync, new file/attachment will be uploaded to S-Drive automatically. You can also configure deleting the Salesforce files/attachments after successful configuration.

To sync file/attachments to S-Drive, click the "configure sync" button. You will see a message that it is processing objects. This is processing that is done in order to display next configuration screen shown below.





Synced Objects				
Object 🚺	Object File	Object File Relationship 3	Attachment	File
Account	cgAccountFilec ~	cg_Account_c	Ø	
Case	cgCaseFilec ~			
Contact	cgContactFilec ~			
Lead	cg_Lead_File_c ~			
Opportunity	cgOpportunityFilec ~			
Project	Project_File2c ~			
Student	Student_Filec ~			
Enable To De es/Attachments A				
Enable To De les/Attachments A Upl Sync Status	lete 7 fter oad 9 Save Cancel			
Enable To De les/Attachments A Upl Sync Status	lete 7 oad 0 8 3	Retry 11		
Enable To De les/Attachments A Upl Sync Status Failed S	lete 7 fter oad 9 Save Cancel	Retry 11		
Enable To De les/Attachments A Upl Sync Status Failed S	lete fter oad	Retry 11 Refresh Sync Status 13		
Enable To De les/Attachments A Upl Sync Status Failed S In Progress S	lete fter oad			
Enable To De les/Attachments A Upl Sync Status Failed S In Progress S Configure File Sy If you alread	lete fter oad 3 Save Cancel ync Failed sync count: 1 10 ync In progress sync count: 0 12 ync of Pre-existing Files	Refresh Sync Status ¹³ n also configure File Sync of these. First enal	ole File Sync on your obje	ect.



For each Object (1) for which you want to sync files or attachments, select the S-Drive file object you want to use for syncing from the dropdown list (2). There will usually only be one choice.

In the Object File Relationship field **(3)**, enter the API name of the field that relates to the parent object. For the S-Drive File Objects that come bundled with S-Drive, these will be cg__Account__c, cg__Case__c, cg__Contact__c, cg__Lead__c, cg__Opportunity_c. For S-Drive file objects created through S-Drive Configuration Customization Settings (those that didn't come standard with S-Drive), it will be Parent__c.

Check the checkboxes (4) and/or (5) to indicate whether you want to sync files, attachments, or both.





Click Save.

In "General Settings" section you can enable handling files/attachments in email messages by checking "Enable to Handle Email Files/Attachments" **(6)**. You can check "Enable to Delete Files/Attachments After Upload" configuration, if you want to delete the Salesforce Files/Attachments after successfully syncing to S-Drive**(7)**. If you uncheck this option, both Salesforce Files/Attachments and S-Drive will be available after syncing.

Click Save (8).

In "Sync Status" section, you can see failed sync job (10) and progressing sync job (12) counts and can click to retry failed jobs (11). After clicking this button, you can see updated sync status You can refresh the failed and progressing file/attachment sync count status by clicking "Refresh Sync Status" (13) button.

In "Configure File Sync of Pre-existing Files" section, you can sync older Salesforce Files with SDrive. If you want to enable pre-existing Salesforce file sync for an object, you just need to select the "Object File", fill the "Object File Relationship" field and check the related "File" checkbox. You can go to the configuration page by clicking "Go" button **(14).** This takes you to the screen below.

	Cenerate File Sync Cancel		
File Sync Enabled Objects Related S-Drive			
To create File Sync o button.	of existing Salesforce files of an object, select Create checkbox next to	an object and click on Generate File Sync	
Object 1	Object File	Create 3	
Account	cgAccountFilec ~		
Case	cgCaseFilec ~		
Contact	cgContactFilec ~		
Lead	cg_Lead_File_c ~		
Opportunity	cgOpportunityFilec ~		
Project	Project_Filec ~		
Student	Student_Filec ~		
	4 5		
	Generate File Sync Cancel		

If you want to sync pre-existing Salesforce Files for an object, Look for the desired object in the Object section (1) and select the "Object File"(2) to be used for syncing. Check "Create" (3) checkbox. Click "Generate File Sync" button (4).



You can inspect individual "AttachmentSync" objects to see more details and see "File/Attachment Sync" section of this document for more details about the sync process.

8.4.4 S- URL (Short URL)

File URLs generated by Amazon S3 services are too long. They cause problems in some mail programs such as MS Outlook, and are not easy to share. These long URL links also expire in 7 days. To use a shortened URL, which can last 20 years (or be configured to expire sooner) you can use the **S-URL feature** of S-Drive. Once configured, using the "copy URL" action on a file will generate a short URL.

S-URL is also needed to use the Public Share feature (available in Lightning only), which can be used to share files with users outside of Salesforce.

Public Share & S-URL features can be used separately but they have the same configuration. They use **force.com Sites** to create short URLs with your brand name. You may need to buy *force.com Sites license* to use this feature. (To get more information please visit <u>https://developer.salesforce.com/page/Sites</u>)

To set up S-URL and use Sharing S-Drive files in Public Site feature (configured from the S-Drive Lightning component), see section 9.1 How to Activate Public Share Link & S-URL in Your Organization for instructions on setting up your public share site. Once enabled, check the checkbox on to enable S-URL and copy the url of your site into the box as shown in section 9.1.3.

For doing a custom branding on your public share site, please see S-Drive Developer Guide.

See section 9.1 How to Activate Public Share Link & S-URL in Your Organization for instructions on setting up your public share site.

8.4.5 **S-Action**

This configuration enables users to create and add custom actions to S-Drive. Please refer to S-Actions (Custom Actions) for detailed configuration.

8.4.6 **Preview and Thumbnail**

You can find this configuration under General Settings section in S-Drive Configuration Tab. To open this configuration, click on "Configure Preview & Thumbnail" button (Figure 174). Using this configuration;

• You can enable/disable preview and thumbnail conversion per object.





- You can enable/disable preview and thumbnail conversion per file type.
- You can monitor conversion status and retry failed conversions.
- You can generate preview and thumbnail of pre-existing S-Drive Attachments.

Preview and Thumbnail (Paid)
To enable this configuration, click on "Configure Preview and Thumbnail" button. Using this configuration; * You can enable/disable preview and thumbnail conversion per object. * You can enable/disable preview and thumbnail conversion per file type. * You can monitor conversion status and retry failed conversions. * You can generate preview and thumbnail of pre-existing S-Drive Attachments
Preview & Thumbnail Configure Preview & Thumbnail
Figure 8-27

Enable Preview and Thumbnail Per Object Related S-Drive

After a successful file upload, S-Drive can generate preview and thumbnail of your file, if this feature is enabled on your object and file types are configured. To enable preview and thumbnail on your object, you should click on the enabled checkbox next to the object and save it (Figure 8-26). To disable it, you should uncheck the enabled checkbox and save it. Preview and Thumbnail conversion will not be performed, and your file types configuration will be ignored, if object is not preview and thumbnail enabled.





	Save	
Objects Related S-Drive		
	/disable Preview and Thumbnail conversion for your objects related S-Drive. To enable on. To disable it, uncheck the enabled checkbox and save the configuration.	it, click on the enabled checkbox next to the
Object	Object File	Enabled
Account	cg_AccountFile_c ▼	
Case	cg_CaseFile_c ▼	
Contact	cg_ContactFile_c ▼	
Contract	cg_Contract_File_c ▼	
Lead	cg_Lead_File_c ▼	
My Example Object	cg_My_Example_Object_Filec ▼	
Opportunity	cgOpportunityFilec ▼	Ø
Package	cg_Package_File_c ▼	
S3Object	cg_S3Object_c ▼	Ø
Upload Request	cg_MyCustomFile_c ▼	

Additional S3 storage will be consumed by the previews and thumbnails.

Figure 8-28





Enable Preview and Thumbnail Per File Type

You can choose which file types will be allowed for preview and thumbnail conversion on your objects related S-Drive. To enable a file type, select your object from **"Object Types"** select list and move desired file type from **"Conversion Available File Types"** box to **"Conversion Allowed File Types"**. Then save configuration before changing the object type. To disable a file type, move desired file type from **"Conversion Allowed File Types"** box to **"Conversion Available File Types"**. Then save configuration (Figure 8-27).

example, If you enable Accour will be generated after a 'jpg' o ignored and conversion will no	ure which one of the file types should be considered for Preview and Thumbnail conversion on your preview enabled objects. For nt File object above and if you allow conversion of a 'jpg' and 'mp4' file for Account File Object in this section, a preview and a thumbnail or 'mp4' file upload to Account File Object and you will be able to display or stream them in your page. File types configuration will be to be performed if the object is disabled above. To configure file types, select an object from the selectlist below and move desired file to wed list. Then save the configuration. S-Drive has already configured some common file types for you!
Dbject Types	
Case File	Y
Conversion Available File Types 3fr 3g2 3gp 3gpp abw ai arw bmp cavs cdr	Conversion Allowed File Types avi doc doc docx gif jpeg jpg mov mp4 mpeg mpg
Prease save the current configura	tion before changing the object type.



"Conversion Available File Type" is a file type that S-Drive can generate its preview and thumbnail but needs your permission to perform conversion. That is why you should allow the file type by adding it to **"Conversion Allowed File Types"** box. S-Drive has already pre-configured some common file types for you. If you preview and thumbnail enable an object and do not configure a file type for it (accept the defaults), "avi, doc, docx, gif, jpeg, jpg, mov, mp4, mpeg, mpg, pdf, png, ppt, pptx, psd, wmv, xls, xlsx" types will be auto enabled. You can allow more file types or disallow some of them.

Let's say you have enabled "Case File" object for preview and thumbnail conversion and also enabled "jpg" and "mp4" types for Case File. If you upload a "jpg" file to Case File object, you will be able to display it's preview and thumbnail. If you upload an "mp4" file to Case File, you will be





able to stream it. In this case, no conversion will be performed for any other (not allowed) file type even if your object is preview and thumbnail enabled.

Monitor Conversion Status

In this section, you can monitor status of your preview and thumbnail conversions and retry failed ones (Figure 8-28). For more information, you can create "Preview" object tab and check related records.

Conversion Status	
 In this section, you can i 	monitor status of your conversions and retry failed ones. To see more details about failed previews, you should check Preview object.
Failed Preview :	Failed preview count: 7
	Retry
In Progress Preview :	In progress preview count: 51
	Refresh Preview Status

Figure 8-30

Generate Preview and Thumbnail of Pre-existing S-Drive Attachment

If you already have attachments in S-Drive before preview and thumbnail feature released, then you can bulk generate preview and thumbnail of your pre-existing attachments. First, you must preview and thumbnail enable your object and configure file types for it, then you should click on the "Go" button in "Generate Preview and Thumbnail of Pre-existing Attachment" section (Figure 8-29).

Generate Preview and Thumbnail of Pre-existing Attachments
If you already attached some files to your object, you can also generate Preview and Thumbnail of these. First enable Preview and Thumbnail conversion on your object and configure file types if needed. Then click on 'Go' button to generate Preview & Thumbnail of pre-existing attachments.
Generate Preview and Thumbnail of Pre-existing Attachments Go

Figure 8-31





Then a visual force page will be loaded. In this page, you should select "Create" checkbox next your object and then you should click on "Generate P&T" button (Figure 8-30). This will invoke a batch job and S-Drive's preview and thumbnail service will start conversion.

	Generate P&T Cancel Refresh Job Status	
Preview Enabled Objects Re	lated S-Drive	
To create Preview & Thu	umbnail of existing files of an object, select Create checkbox next to an object and click or	n Generate P&T button.
Object	Object File	Create
Account	cg_AccountFile_c ▼	
Case	cg_CaseFile_c ▼	
Contact	cg_ContactFile_c ▼	
Opportunity	cgOpportunityFilec ▼	
S3Object	cg_S3Object_c ▼	Ø
Additional S3 storage will be	consumed by the previews and thumbnails.	
	Generate P&T Cancel Refresh Job Status	

Figure 8-32

There two main requirements to generate preview and thumbnail of a file.

- Object must be preview and thumbnail enabled.
- Type of attached file must be allowed for conversion on your object.

Important Note: Additional AWS S3 storage will be consumed by the previews and thumbnails. Also, you can check conversion pricing at <u>https://www.sdriveapp.com/pricing/</u>. Once S-Drive 2.0 installed into your organization, S-Drive Folders (S3Object) will be auto enabled for preview and thumbnail conversion of upcoming "avi, doc, docx, gif, jpeg, jpg, mov, mp4, mpeg, mpg, pdf, png, ppt, pptx, psd, wmv, xls, xlsx" file types. You can change this configuration if you want to.

8.4.7 Records Management

Records Management (RM) is a micro service offered by S-Drive at \$500/month. The usage is prorated and rounded up to the nearest hour. With RM, you can apply retention policies to your files, have file check-in & check-out functionality, and put your files under legal hold.





To enable Records Management, check "Enable Records Management" and click OK on the pop-up message.

	S-Drive	Home	S-Drive	S-Drive Cor	nfiguration	S-Drive Advanced	Search S-Drive	SQueues	retention policy can be determined to datomate disposition of mes	
	e Configura ive Authentio		igs	General S	Settings	Customi	Save C	ancel	"files can be checked in and checked out explicitly "legal hold or freeze can be placed on files The total cost of this solution is \$500/ month. The cost will be added to your monthly invoice. By clicking 'Ok', you agree to the monthly cost.	Video Tutori
	cords Mar enabling reco			on policy can b	be determine	d to automate disposi	ion of files, files ca	an be checked	We will enable versioning on your S-Drive bucket unless versioning is enabled.	total cost of thi
		Enal	ble Records	Management						
			Ret	ention Policy	Configure F	Retention Policy				
		Enat	ole Check-In	& Check-Out						
	E	nable Auto-D	ownload Afte	er Check-Out						
	Ena	ble Check-In	Redirect To	Upload Page						
			Enabl	e Legal Hold						

Figure 8-33

This will enable the checkboxes for Check-in & Check-Out and Legal Hold.

Records Management (PAID)	
By enabling records management, retention policy can b	e determined to automate disposition of files, files can be checked in and checked out explicitly, legal hold or freeze can be placed on files.
Enable Records Management	Remove Locks From All File Objects
Retention Policy	Configure Retention Policy
Enable Check-In & Check-Out	Remove Locks From All Checked Out Files
Enable Auto-Download After Check-Out	
Enable Check-In Redirect To Upload Page	
Enable Legal Hold	Remove Locks From All Files Under Legal Hold
Available File Objects For Legal Hold Case File Contact File Lead File MyS3Object Opportunity File Student File Student File Student File Student File Test File Test File	Selected File Objects For Legal Hold Account File S30bject

Figure 8-34

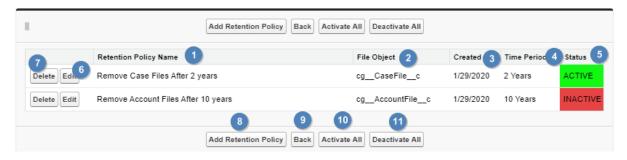
If you would like to disable RM after enabling it, and have files locked either through Check-Out or Legal Hold, you can click "Remove Locks From All File Objects" button. As the name suggests, clicking

this button removes locks of any kind (whether checked out or on legal hold) from all file objects. After that, you can uncheck the "Enable Records Management" checkbox and click "Save" to disable the feature. Please note that if you try to save this configuration while having checked-out files, or files under legal hold, you'll see an error message.

van Gat

8.4.7.1 Retention Policy

Retention Policy is a feature under the Records Management micro service. Retention policies cause files that meet the configured criteria to be deleted from S-Drive storage at the specified time. Retention policies delete all existing versions of files covered in the policy. "Configure Retention Policy" button is clicked to manage retention polices. That will bring you to this screen.





Here, you can manage your retention policies. Retention Policy Name (1), related file object (2), policy created date (3), time period (4) and policy status (5) are listed on the page. You can edit (6), delete (7) or create a new retention policy (8). If you want to go back to the S-Drive Configuration page, click Back (9) button. You can active all your retention policies (10) or deactivate them (11). To activate or inactivate a single policy, click "edit" next to the policy and change the status at the bottom of the edit window.

You can create new retention policy by clicking "Add Retention Policy" button (8).





	Save Cancel	
Retention Policy Name	1	
Time Period	Days 🔻 2	
Objects	Account V Account File V	
	3 4	
Rule Criteria	criteria are met 🔹 5	
	Field Operator Value	
	1None V	
9	Add Row 6 7 8	
1	Add Filler Levis	
Email Notification	Name Time Actions	
1	Add Email Notification	
	12 13	

Figure 8-36

In "Retention Policy Panel" section, you can enter a name for retention policy (1), specify the amount of time in days, months, or years you need to retain the file, beginning from the file created date (2). You should select your standard or custom object (3) and S-Drive file object (4). You can pick "criteria are met" or "formula evaluated to true" options (5). If "criteria are met" option is picked, you should select S-Drive file object fields (6), select any of operator such as: equals, not equals, starts with, contains, less than, etc. (7) and populate criteria value (8). (Note: if you go to the list view of the file object, such as AccountFiles, and display the field you want to use for criteria, you will see exactly what to put in the Value field. For example, for content type, you'll see image/png, application/pdf, etc.) You can add more criteria by clicking "Add Row" (9) and change filter logic by clicking "Add Filter Logic" (10). Default logic is AND, but you can change filter logic to include AND and OR combinations, such as (1 AND 2) OR 3. If "formula evaluated to true" option is picked, you should define a formula, for example; cg__File_Size_In_Bytes__c > 7000. You can send email notification by clicking "Add Email Notification" button (11). Click "Save" button (12) to create the new retention policy or "Cancel" (13) to leave without saving.





Retention Policy Ema	ail Notification Panel	20 🗙
	Save	
Email Notification Name Time Period Email Notification	Days 2 File owners 3 Specified users 4 Additional Email adresses: 5 6 7 Save Cancel	

Figure 8-37

In "Retention Policy Email Notification Panel" (if you've clicked Add Email Notification on the Retention Policy Panel), you can enter a name for email notification (1), specify the amount of time before deletion you want the notification sent, (2). You can send email notification to file owners (3), specified user by selecting user list (which displays once the Specified users checkbox is checked (4)) or custom email address (5). You can create new retention policy email notification by clicking "Save" button (6). You can cancel email notification or go back to "Retention Policy Panel" section (7).

8.4.7.2 Check-In & Check-Out

Check-In & Check-Out is a feature under the Records Management micro service. Using this feature, you can "check-out" a file, effectively preventing others from deleting or modifying the file, and when you're finished with the document, "check-in" the file. This feature can be enabled/disabled from the S-Drive Configuration page.

Check-In & Check-Out comes with 2 sub configurations:

- If you would like to have your browser auto-download the file once "Check-Out" button is clicked, "Enable Auto-Download After Check-Out" as well.
- If you would like to have a pop-up window that asks "Would you like to upload a new version to this file" once "Check-In" button is clicked, "Enable Check-In Redirect To Upload Page" as well.





If you would like to disable Check-In & Check-Out after enabling it, and currently have files checked out (locked), you can click "Remove Locks From All Checked Out Files" button. As the name suggests, clicking this button checks in (unlocks) every checked-out file. After that, you can uncheck the "Enable Check-In & Check-Out" checkbox and click "Save" to disable the feature. Please note that if you try to save this configuration while having checked-out files, you'll see an error message.

-Drive Configuration	Save	
S-Drive Authentication Settings General Set	ttings Customization Settings	Micro Services
Records Management (PAID)		
By enabling records management, retention policy can be	e determined to automate disposition of files, files can be o	checked in and checked out explicitly
Enable Records Management		
Retention Policy	Configure Retention Policy	
Enable Legal Hold		
Enable Check-In & Check-Out	Remove Locks From All File Objects	
Enable Auto-Download After Check-Out	•	
Enable Check-In Redirect To Upload Page		



Please note that in order to enable Check-In & Check-Out, "Records Management" needs to be enabled beforehand. Records Management solution costs \$500/month but it is prorated.

Once Check-in and Check-out is enabled, you will see options for check-in/check-out in the action menu for your files. See the S-Drive User's Guide for more information.





8.4.7.3 Remove Lock Permission

Check-In & Check-Out feature incorporates a custom permission called "RemoveLockPermission" that must be created as follow:

- Go to Setup→Custom Permissions and click new
- Fill in the fields as shown and click Save

Custom Permise	sions			
^{Custom Permission} Remove Lock Permissio	on			Give Us FeedbackHelp for this Page 🤣
Custom Permission Edit	Save & New Cancel			
Information				Required Information
Label	Remove Lock Permission	Connected App	S-Drive	N
Name Description	RemoveLockPermission	Protected Component		
	Save Save & New Cancel			



You can either add this permission to a permission set of your organization (which is then assigned to users/profiles) or enable it for a specific profile.

If a user has this permission, or if user is a System Administrator, locks can be removed by the user, independent of who put the lock in the first place. Otherwise, only the person who checked-out a file can check-in. Additionally, Legal Hold functionality is only available to holders of this custom permission and System Administrators.

8.4.7.4 Legal Hold

Legal Hold functionality allows users with Remove Lock Permission (see above) to put files under legal hold, preventing others from deleting or modifying the file. Legal Hold is like check-in & check-out, the differences being

• Only certain users with the specified permission can put files under legal hold, or remove files from legal hold





- File objects available for legal hold must be explicitly selected from the configuration menu (see Figure 8-32)
- Legal Hold is hierarchically above Check-In & Check-Out, i.e., a file under legal hold can't be checked-out but a checked-out file can be put under legal hold.
- Files that are on Legal Hold will NOT be deleted at the end of a retention period unless criteria (Lock State equals legalHold) is set to include them in deletion.

If you would like to disable Legal Hold after enabling it, and currently have files on Legal Hold, you can click "Remove Locks From All Files Under Legal Hold" button. As the name suggests, clicking this button removes all files from legal hold. After that, you can uncheck the "Enable Legal Hold" checkbox and click "Save" to disable the feature. Please note that if you try to save this configuration while having files under legal hold, you'll see an error message.

Please note that in order to enable Legal Hold, "Records Management" needs to be enabled beforehand. Records Management solution costs \$500/month but it is prorated.

Once Legal Hold is enabled, you will see options for Put Legal Hold/Remove Legal Hold in the action menu for your files. See the S-Drive User's Guide for more information.

8.5 S-Drive Documentation

This section includes a set of detailed user documentation for S-Drive configuration and usage. Each document has different focus; therefore one might need to select carefully to look for detailed information.

8.6 Video Tutorials

This section includes a set of videos related to S-Drive configuration with Amazon, Salesforce and setting up the features of S-Drive. Users can benefit these videos when they need help to activate and use S-Drive on their Salesforce organizations.

9 ADVANCED FEATURES

9.1 How to Activate Public Share Link & S-URL in Your Organization



Public Share & S-URL features can be used separately but they have the same configuration.

S-URL: File URLs generated by Amazon S3 services are too long. It causes problems in some mail programs such as MS Outlook, and it is not easy to share. In order to use a shortened URL, you can use **S-URL feature** of S-Drive.

Public Share: You can share your files & folders to public users. You can set password, IP Range, Expire dates and so on. This feature is available in Lightning only.

Public Share & S-URL uses **force.com Sites** to create short URL with your brand name. You may need to buy *force.com Sites license* to use this feature. (To get more information please visit <u>https://developer.salesforce.com/page/Sites</u>)

9.1.1 Create A Force.com Site

In order to create a Force.com site, you need to navigate to **Setup > User Interface > Sites and Domains > Sites**. In this page, you can create a new site using the **New** button.





ite Edit	21/ 21/ 2	Save	2
		Save	
Site Label	sUrlRedirect	1	
Site Name	sUrlRedirect	1 2	
Site Description			
Site Contact	Erhan FIRAT	R 1 3	
Default Web Address	http://efirat-developer-ed	tion.eu6.force.com/ surl	
Active	I		
Active Site Home Page	SUrlRedirect	(Preview) 5	
Inactive Site Home Page			
Site Template		R 1	
Site Robots.txt		9	
Site Favorite Icon		9	
Analytics Tracking Code		i	
URL Rewriter Class	sUrlRewriter	S 1	
Enable Feeds			
Clickjack Protection Level	Allow framing by any	r page (no protection) 🔹 🚺 👩	
Require Secure Connections (HTTPS)	🔲 🚺		
Upgrade all requests to HTTPS	i		
Enable Content Sniffing Protection	i		
Enable Browser Cross Site Scripting Protection	i		
Referrer URL Protection	i		
Guest Access to the Support API	i		

Figure 9-1

- 1. Site Label: This is the label of your site. You can name it any way you want.
- 2. Site Name: This is the name of your site. You can name it any way you want.
- 3. Site Contact: This is the name of the site contact. You can choose any user from the lookup.
- 4. Default Web Address: This is the default web address that you will be using for your S-URLs. You can fill in the input box the way you want.
- 5. Active Site Home Page: Click on lookup and search for SUrlRedirect. Click on SUrlRedirect to choose and close the lookup page.





- **6.** URL Rewrite Class: Click on lookup and search for SURLRewriter (Figure 9-1-6). Click on SURLRewriter to choose and close the lookup page.
- 7. Clickjack Protection Level: You can choose any protection level from this option.

Once you configure these fields, click on **"Save"** button at the bottom of the page.

9.1.2 **Configuring the Public Access Settings of your Site**

Once you create your site you should also make some configurations. From **Setup** go to the **Sites** section again and find your site. Click on the site name to open the site detail page. Click on **Public Access Settings** in this page.

Site Details SUrl		
« Back to List: Sites		
Site Detail		Edit Public Access Settings Login Settings URL Redirects Deactivate
Site Label	SUrl	
Site Description		
Active		
		Figure 9-2



There are 3 important sections in the Public Access Settings Page.

 Enabled Apex Class Access: Click on Edit button when you navigate to this section by scrolling down. A new page will be opened. In this page choose all classes with prefix "cg" and add them to Enabled Apex Classes.





ect the Visualforce pages that you want to mak	e a	ccessible	at this Salesforce site.	
			Save Cancel	
Available Apex Classes			Enabled Apex Classes	
ChangePasswordController ChangePasswordControllerTest CommunitiesLandingControllerTest CommunitiesLandingControllerTest CommunitiesLoginController CommunitiesSelfRegConfirmController CommunitiesSelfRegConfirmControllerTest CommunitiesSelfRegController CommunitiesSelfRegController ForgotPasswordController ForgotPasswordControllerTest LightningForgotPasswordController	*	Add Add Remove	cg.SDriveConfigUtil cg.SDriveController cg.SDriveControllerExtension cg.SDriveInstallHandler cg.SDriveTools cg.SDriveWebServiceUtils cg.SQueueBatch cg.SQueueBatch cg.SQueueScheduler cg.ShareController cg.ShareUtil cg.UpdateSDriveObjectBatch cg.UploadRequestInfo cg.SUrlController	



Once you add them to the enabled apex classes list, click Save button.

2. Enabled Visualforce Page Access: Click on Edit button when you navigate to this section by scrolling down. A new page will be opened. In this page choose cg.EmailPage, cg.HtmlUploadPage, cg.SDrive, cg.SUrlRedirect, cg.UploadPage visualforce pages and add it to the Enabled Visualforce Pages list.





Enable Visualforce Page Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

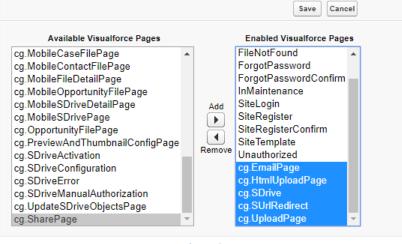


Figure 9-4

Once you add the Visualforce page to the enabled list, click Save button.

3. Custom Object Permissions: For editing the Custom Object Permissions, click on the "**Edit**" button at the top of the page.

SUrl Profile	
Users with this profile have the permissions and page layo	its listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links	the Record Type Settings section below to make one or more record types available to users with this profile.
	Login IP Ranges [0] Enabled Apex Class Access [2] Enabled Visualforce Page Access [12] Enabled External Da
Profile Detail	Edit View Users
Name	SUrl Profile
User License	Guest
Description	

Figure 9-5

Scroll down to the Standard Object Permissions section and enable Basic Access for SUrls and SUrl Hits objects.





Standard Object Permissions

	Basic Acce	:55			Data Admin			Basic Acce	35			Data Admini	istration
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify Al
Accounts		1					Goal Links						
Assets							Ideas						
Campaigns							Leads						
Cases							Metrics						
Coaching							Metric Data Links						
Contacts							Opportunities						
Contracts							Orders						
Documents							Performance Cycles						
Feedback							Price Books						
Feedback Questions							Products						
Feedback Question Sets							Quick Text						
Feedback Requests							Solutions						
Goals	-												

If you want to share an object's files, please first give permission for its parent object. For example, if you want to share Account Files, you should also give permission to Account object.

Choose objects you want to share publicly.

Scroll down to the Custom Object Permissions section and enable Basic Access for SUrls and Surl Hits objects.

	Basic A	ccess			Data Adn	ninistration		Basic A	ccess			Data Adn	ninistration
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Account Files	~	~	1	~			My \$30 bjects	~	~	~	~	~	~
ATrials							Opportunity Files	~	~	~	~		
ATrial Files							Previews	~	~	~	1	~	~
AttachmentSyncs							S3Configs	~	✓	~	1	✓	~
Case Files	~	~	~	~			\$3Objects	~	~	1	1	1	~
Contact Files	~	~	~	~			SDriveCustomActions	~	~	~	1	1	~
ExternalFileMessages							SQueues	~	~	~	1	1	~
File Activities							SUrls	~	~	~	1	~	~
Lead Files	1	1	1	1			SUrl Hits	1	1	1	1	1	~

Figure 9-6



In the Figure 9-6, red lined objects must be selected. Yellow lined objects are selectable file objects. You should choose object that you plan to share publicly. Don't forgot that, if you plan to share Account Files, permissions should be set Account Files and Account object.

If you would like to track file activities, such as downloads, also choose permissions for the File Activities object.

S3Object refers to files on Sdrive Tab, MyS3Object refers to files on MyDrive.

Once you give the access, click on "Save" button at the top of the page.

9.1.3 Sharing Settings

With Salesforce Summer '20, there were changes to Guest User security, which affected our Public Share feature. Changes need to be made in profiles and sharing rules to make Public Share work.

- In Setup \rightarrow Sharing Settings, make sure the box for Secure Guest User Access is checked.
- For a file object with a master-detail relationship to the parent (i.e. AccountFile and Account)
 - In Setup, go to the file object you want to use Public Share with (for example AccountFile.) Edit the Account field (or whatever field is the master-detail field) and change the sharing setting radio button to read only.

This Custom Field Definition is managed, r	reaning that you may only edit certain attributes. Display More Information	
Custom Field Definition Edit	Save	
Field Information		
Field Label	Account Data Type Maste	er-Detail
Field Name	Account	
Namespace Prefix	og	
Description		
	/h	
Help Text		
Data Owner	User 🗸	
Field Usage	None 🗸	
Data Sensitivity Level	None 🗸	
Compliance Categorization	Available 🔺 Chosen 🔺	
	PII D	
	GDPR	
	PCI -	
Master-Detail Options		
Related To	Account Child Relationship Name Acco	ount_Files
Related List Label	Account Files	
Sharing Setting	Select the minimum access level required on the Master record to create ledit, or delete related Detail records	
	Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.	
	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.	
Allow reparenting	Child records can be reparented to other parent records after they are created	

Setup \rightarrow Sharing Settings, go to the sharing rules section.



- For the parent object (ex: Account), create a sharing rule to share all Accounts (in this example) with Guest User (only Read access is allowed.) Use criteria that is always true, such as CreatedById is not equal to null.
- For the surl object, create a sharing rule to share all sUrls with Guest User. Use criteria that is always true, such as CreatedById is not equal to null.
- If the file object has a lookup relationship to the parent, then on the file object, create a sharing rule to share all with the Guest User. Use criteria that is always true, such as CreatedById is not equal to null.
- In the Guest User Profile (Go to Setup→Sites, click on Site Label for your public share site, click on Public Access Settings button).
 - \circ $\;$ Make sure there is read access on the parent object (ex: Account)
 - Make sure there is read access on surl.
 - Make sure the file object (ex: AccountFile) has the permissions you want—read for read/download access or read/create/edit for uploading or editing metadata.
 - In order for Guest Users to upload, you must share a folder for them to upload into.
- On the public share Site page (Setup→Sites), make sure the box for Assign new records created by Salesforce Sites guest users to a default owner in the org is **unchecked**. This box may not appear at all in your org, depending on when your org was created.





Sites		
markeling.	Your Force.com Domain	MyCo
		MyCo Crea
Your Salesforce site domain name is claire5-public-share-develop Salesforce Sites Terms and Conditions	per-edition.na139.force.com	
Settings These settings affect all Salesforce sites.		
Assign new records created by Salesforce Sites guest users to a		
Allow using standard external profiles for self-registration and use	er creation 1	

9.1.4 S-Drive Configuration

When you create the force.com site with these configurations, navigate to S-Drive Configuration page. Check the "Enable Short URL" checkbox and write the URL of your site to the "Base URL" input box.

Update Amazon S3 Credentials and Bucket Name	Click here to update
Enable Checksum Verification	
Restricted Portal User Profiles	
	Default Email Footer
Custom Email Footer (Uncheck to use default email footer)	
Default Email Expiration Time	Unlimited minute(s) •
Only Allow Users with Modify All Permissions to Create Items at the Top Level	
Enable Email on S-Drive Tab 🖉	disable for portal users
Sync Salesforce Attachments with S-Drive	Configure AttachmentSync
Enable Amazon S3 Transfer Acceleration	
Preview & Thumbnail	Configure Preview & Thumbnail
Enable S-URL 🗹	Base URL http://sdrive-developer-editio







9.1.5 Checking File Audits

After these configurations, you will be able to use short URLs and also the "Audit" tab in "Details" page of files and folders will be available. In this page there are different fields of information such as Short URL, Created Date, Expiration Date, Hit and Download counts, and Total Hit Count.

FOT	2016年カレンダ- (山梨1.pdf 29:08:K8		8 3 9 7 8 2 5 5	···• I ← I
Det	talis 💣 Chatter 🛛 🖪 Audit			
	SHORT URL	CREATED DATE	EXPIRATION DATE	ITS DOWNLOAD
	www.asd.coma0W8000000UpiGMEAZ	Jan 15, 2018 6:09:40 AM	Nov 23, 2037 1:05:26 AM 0	
	www.asd.com/a0W8000000UpIJ6EAJ	Jan 17, 2018 3:18:06 AM	Jan 12, 2038 3:18:06 AM 0	
	www.asd.com/a0W8000000UpIJVEAZ	Jan 17, 2018 5:22:21 AM	Jan 12, 2038 5:22:21 AM 0	
	www.asd.com/a0W8000000UpIJREAZ	Jan 17, 2018 5:22:51 AM	Jan 12, 2038 5:22:51 AM 0	
	www.asd.com/a0W8000000UpiJSEAZ	Jan 17, 2018 5:23:16 AM	Jan 12, 2038 5:23:16 AM 4	
	www.asd.com/a0W800000UpIJfEAJ	Jan 17, 2018 7:38:05 AM	Jan 12, 2038 7:38:05 AM 0	
	nulla0W800000UplLWEAZ	Jan 18, 2018 3:42:49 AM	Jan 13, 2038 3:42:49 AM 0	
	www.asd.com/a0W900000Uq3GSEAZ	Jan 29, 2018 7:21:12 AM	Jan 29, 2018 7:31:12 AM 0	
•	http://sdrive-developer-edition.na6.force.com/uploadrequest/a0W8000000Uq3HuEAJ	Jan 30, 2018 9:08:03 AM	Jan 26, 2033 9:08:03 AM 2	
	http://sdrive-developer-edition.na6.force.com/uploadrequest/1jrcyj	Jan 31, 2018 7:48:50 AM	Jan 31, 2018 7:58:50 AM 1	
	http://sdrive-developer-edition.na6.force.com/uploadrequest/0]ib72	Jan 31, 2018 3:02:37 PM	Jan 31, 2018 3:12:37 PM 0	
	http://sdrive-developer-edition.na6.force.com/uploadrequest/wj8jsu	Jan 31, 2018 3:08:29 PM	Jan 31, 2018 3:18:29 PM 0	
	http://sdrive-developer-edition.na6.force.com/uploadrequest/wSzgof	Jan 31, 2018 3:08:41 PM	Jan 31, 2018 3:18:41 PM 1	
	http://sdrive-developer-edition.na6.force.com/uploadrequest/jgpf0f	Jan 31, 2018 3:08:49 PM	Jan 31, 2018 3:18:49 PM 1	
•	http://sdrive-developer-edition.na6.force.com/uploadrequest/j3cc9z	Jan 31, 2018 3:08:55 PM	Jan 26, 2038 3:08:55 PM 2	
	http://sdrive-developer-edition.na6.force.com/uploadrequest/kudk9p	Feb 1, 2018 6:14:21 PM	Jan 27, 2038 6:14:20 PM 0	
	sdrivefans.com/uploadrequest/cqdb13	Feb 1, 2018 6:16:14 PM	Jan 27, 2038 6:16:14 PM 0	
	sdrivefans.com/upload/kjxt9v	Feb 5, 2018 7:20:54 AM	Jan 31, 2038 7:20:54 AM 0	
0	http://sdrive-developer-edition.na6.force.com/uploadreguest/c0yu3b	Feb 5, 2018 7:53:32 AM	Jan 31, 2038 7:53:32 AM 1	

Figure 9-9

9.2 S-Actions (Custom Actions)

S-Actions is the exciting new S-Drive feature released on version 2.1. Customers can develop their custom codes on VF Pages, Lightning Components or Static Resources Scripts and these code blocks can be embedded to S-Drive component as S-Action.





S-Drive identifies your VF Pages, Static Resource Scripts or Lightning Component via S-Action definitions. S-Drive can import your custom action code blocks to S-Drive component in 4 different types which are *Hidden, Display, Redirect* or *Lightning Component*.

According to your S-Action definition, it is added on related objects Action Menus (

🛓 💼 🔽 🔝 1110531... 20:) and Toolbar S-Actions button (🗵 🗉 🛄 🛄 📰) as an option.

When a custom action is selected from menu, S-Drive runs your code blocks sending selected files id list with action name as parameters. After action is done, S-Drive inform users about action status.

Let's add a new S-Action by clicking Add S-Action button on Figure 9-10-1

dd S-A	ction	1							
		n add you custom actions to S	-Drive. Please see documentation to	det details: ht	to://www.edu	iveapp.com			
d can t	siculo uu	Name	Label	Active	Multiple	Display	Interface	Objects	FileTypes
Delete	Edit	displayFrame	Display Frame: Resource	✓	~	Display	Both	All	All
Delete	Edit	DisplayFrameVFPage	Display Frame: VF Page	✓	✓	Display	Both	All	All
Delete	Edit	lightning	Lightning Component	✓	✓	Lightning Component	Lightning	All	All
Delete	Edit	demoActionResource	Hidden Frame: Resource	✓	✓	Hidden	Both	All	All
Delete	Edit	demoAction	Hidden Frame: VF Page	✓	✓	Hidden	Both	All	All
Delete	Edit	redirectSample	Redirect Sample	✓	~	Redirect	Both	All	AIL

Figure 9-10





	Save					
Name	(1		Label	T	2	
Is Active?	3		Multiple 6		_	
Url	5		Display	None	, 6	
Interface TypeNo	ne 🔻 🕜		File Types 6	2	8	
X-LTr						
OBJECTS * No selection means all obj	ects are available		USERS* No selection means	all users are available		
Available Objects	Selected Objects	9	All Users	Se	lected Users	10
Account File		*	User: CyanGate CyanGate			*
Case File Contact File			User: Erhan FIRAT User: SDrive Dev			
Contract File			User: Chris Brown			
Lead File			User: Gabby Dogan			
MyCustomFile						
My Example Object File						
MyS3Object Opportunity File		-				
Package File				-		
	1					



1. Name

Your custom action name should be action definition without space and special characters (i.e. "deployToWebsite"). This will be sent to the Action code blocks as a URL parameter.

2. Label

Label will be listed on "Action Menu" and Toolbar S-Actions menu button. (i.e. "Deploy To Website")

3. Is Active

This Boolean field holds S-Action is currently active or not. If it is set to unchecked, it won't be listed on Actions menu.

4. Multiple

This Boolean flag determines whether the action is for multiple files or not. If it is just for single files, it will not be listed in Toolbar S-Actions menu button.

5. URL

This field holds URL information of you VF pages, Static Resource Scripts, Lightning Component name or URL to Redirect. For;



- VF Pages: "/apex/[YourPrefix_YourVFPageName]" i.e. "/apex/cg_CustomActionSampleVF". If your organization does not have any prefix, please write "c_" prefix on it i.e. "/apex/c_CustomActionSampleVF".
- Static Resource Scripts: "/resource/[ResourceName]/[ScriptFile]". i.e. "/resource/cg_caDeployFrame/caDeployFrame.html" If your organization does not have any prefix, please write "c_" prefix on it i.e. "/resource/c_caDeployFrame/caDeployFrame.html".
- Lightning Component: "[YourOrganizationPrefix]:[YourComponentName]" i.e. "cg:MyCustomActionComponent".
 If your organization does not have any prefix, please write "c" prefix on it i.e. "c:MyCustomActionComponent".
- **URL to Redirect**: It is simple web URL of your service. i.e. "https://cgsdrive-dev-ed.lightning.force.com/one/one.app"

NOTE! For VF Pages, Static Resource Scripts and URL Redirect options, selected file Ids and action name are sent as URL parameters. For example, if you have *deploy* action on VF page, and URL is set to *"/apex/cg__deployPage"*. On action fire, URL will be similar to this example: *"/apex/cg__deployPage"*. On action fire, URL will be similar to this example: *"/apex/cg__deployPage"*. On action fire, URL will be similar to this example: *"/apex/cg__deployPage"*.

6. Display

There are four display types bond to script type and behavior of S-Action. You can set an action work on background with nothing to display except for informational toaster message, or you can embed your custom action scripts within Iframe.

a) Hidden Frame

On this type of S-Actions, your VF Pages or Static Resources can be embedded to S-Drive Component as a hidden Iframe. This type of S-Actions is suit for running on background process without any feedback of users. For example, you want to upload selected files to your personal website by one click. After you write your apex code and VF page, just select files on the list and click your custom action on the toolbar. And it will work on background to complete process, after completed it will inform user by a toaster message.

S-ACTION URL: When a hidden type action is clicked this URL will be created: [YOUR_S-ACTION_URL] + ?actionName=[S-ActionName]&componentId=1&119ields=[selectedFile1Id,

selectedFile2Id]

"/apex/uploadToServer?actionName=uploadToServer&componentId=1&119ields=0018000001UeY2TAAV,00 18000001UeR44EEY"





b) Displayed Frame

For this one VF Page is shown on the component main screen within Iframe (Figure 9-12 – 1). After S-Action is done, you can give information to users by postmessage method (Figure 9-12 – 2). You can close Iframe by using Back button (Figure 9-12 – 3).

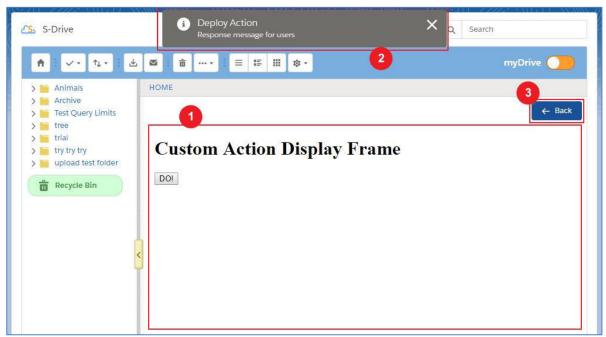


Figure 9-11

S-ACTION URL: When a hidden type action is clicked this URL will be created: [YOUR_S-ACTION_URL] + ?fileIds=[selectedFile1Id, selectedFile2Id]&actionName=[S-ActionName] "/apex/uploadToServer?fileIds=0018000001UeY2TAAV,0018000001UeR44EEY&actionName=upload ToServer"





VISUALFORCE PAGE SAMPLE:

```
<apex:page controller="CustomActionSampleController" >
    <apex:form >
        <apex:actionFunction name="updateFilesAF"
action="{!updateFiles}" rerender="actionResults"
oncomplete="updateFilesFinished();" />
    </apex:form>
   <apex:outputPanel id="actionResults">
        <script>
        function updateFilesFinished() {
            var result = {
                process: 'S-Action', // Required field to show
toaster
                actionName: '{!actionName}',
                componentId: '{!componentId}',
                type: '{!actionResult}', // ['error', 'warning',
'success', 'info']
                title: 'Select All Action',
                message: '{!actionMessage}',
                refresh: true // refresh file list on S-Drive
            };
            var resultStr = JSON.stringify(result);
            parent.postMessage(resultStr, "*");
        }
        </script>
    </apex:outputPanel>
    <apex:outputPanel rendered="{!actionName == 'updateFiles'}">
        <script>
        updateFilesAF();
        </script>
    </apex:outputPanel>
</apex:page>
```





CONTROLLER:

```
public class CustomActionSampleController {
    public String actionName {get;set;}
    public List<String> fileIds {get;set;}
    public String componentId {get;set;}
    public String actionResult {get;set;}
    public String actionMessage {get;set;}
    public CustomActionSampleController() {
        actionName =
ApexPages.currentPage().getParameters().get('actionName');
        componentId =
ApexPages.currentPage().getParameters().get('componentId');
        fileIds = new List<String>();
        String fileIdsStr =
ApexPages.currentPage().getParameters().get('fileIds');
        if (!String.isEmpty(fileIdsStr))
            fileIds = fileIdsStr.split(',');
    }
    public PageReference updateFiles() {
        actionMessage = '';
        if (fileIds.size() >= 1 ) {
            String queryStr = 'SELECT id, cg File Name c,
cg Description c FROM cg AccountFile c WHERE id = :fileIds';
            List<cg AccountFile c> files =
Database.query(queryStr);
            for (cg_AccountFile_c file: files)
                file.cg Description c = 'S-Action';
            try {
                update files;
                actionResult = 'Success';
                actionMessage = 'Files are updated
successfully!';
            }
            catch (Exception e) {
                actionResult = 'Error';
                actionMessage = e.getMessage();
            }
        }
        return null;
    }
}
```





As you can see, after CustomActionSampleController instantiated, we get parameters from page URL. On VF Page output panel renders if action name is right, and it executes the Action Function named "updateFilesAF". After action is completed, "actionResults" panel is re-rendered to inform S-Drive component on parent page via parent.postMessage(). S-Drive component catches message and do necessary reaction.

c) Redirect

In this option, you can redirect users to given URL in a new tab with parameters *123ields* and *actionName*. URL will be: [YOUR_S-ACTION_URL] + ?fileIds=[selectedFile1Id, selectedFile2Id]&actionName=[S-ActionName] i.e. <u>https://cgsdrive-dev-ed--</u> cg.na6.visual.force.com/apex/TestSActionPage?actionName=redirectSample&fileIds=a03800000mqyR 6AAI,a038000000sx1QDAAY,a038000000sx1iEAAQ

d) Lightning Component

You can also embed your custom Lightning Component into S-Drive by S-Actions. Please be sure you map your S-Action URL correctly for Lightning Component (Please see URL Section).

For lightning component FileIds and ActionName parameters are sent to component as component attribute. Here is an S-Action Lightning Component sample:

```
<aura:component access="global" >
        <aura:attribute name="fileIds" type="String[]"
access="global" />
        <aura:attribute name="actionName" type="String"
access="global" />
```

NOTE! Make sure your Lightning component and *123ields* & *actionName* attributes are set to **access="global".**

7. Interface Type

You can select your custom action interface type here. It can be just for *Salesforce Classic*, it can be just for *Lightning* or it can be for *both* interface types of Salesforce. Note that on 2.2.8 release all S-



Action types are available in Lightning. Additionally, hidden type action is available in Classic Attachment Component.

8. File Types

You can limit your S-Action to work defined file types only. If leave this field empty, it means action is available for all file types and Folders. If you write file extensions comma separated, it will be shown only these file types. i.e. if you put "jpg,png,gif,folder", the action will be listed only these file types' action menu. As you can see on the example, you can define folders as "folder" text.

9. Objects

You can limit your S-Action to work with only selected file object types. If you leave this field empty, it will mean the action is available for all object types.

On the left box, named *Available Object*, you can see all file objects that is related to S-Drive component. For example, if you got an action which is only for Case File, you should move Case File option to the right box named *Selected Objects*. Please see Figure 9-13.

		Save	ancel		
Name	lightning	1			
Is Active?					
Url	cg:Custome	rComponentSarr			
Interface Type	Lightning V				
		2		_	
OBJECTS * No selection mea	ns all objects are				1000 E 1000
Available Objects	ns all objects are	Selected Objects	1		U SEF All U
Available Objects Account File	* <u>~</u>		6	*	All U
Available Objects Account File Contact File	ns all objects are	Selected Objects	6	*	All U User User
Available Objects Account File		Selected Objects	6	*	AII U
Available Objects Account File Contact File Contract File Lead File	* <u>~</u>	Selected Objects	6	*	All U User User User User
Available Objects Account File Contact File Contract File Lead File MyCustomFile		Selected Objects	6	*	All U Usei Usei Usei
Available Objects Account File Contact File Contract File Lead File		Selected Objects	р <u></u>	*	All U User User User User
Available Objects Account File Contact File Contract File Lead File MyCustomFile My Example Object File		Selected Objects	<u>e</u>	*	All U User User User User
Available Objects Account File Contact File Contract File Lead File MyCustomFile My Example Object File MyS3Object		Selected Objects	F	*	All U User User User User

Figure 9-13





10. Users

You can limit your S-Action to work for only some users. Empty list means action is available for all users. For example, if you got a Web site manager, and you want to give deploy action permission only for her/him. Then, you should select the user on the *All Users* list and you should move User to the *Selected Users* list. Please see Figure 9-14.

	USERS* No selection means all All Users	users are a	Selected Users	
*	User: CyanGate CyanGate User: SDrive Dev User: Chris Brown User: Gabby Dogan		User: Erhan FIRAT	
-		-		

Figure 9-14

9.3 Lead Conversion

This section explains how to enable/disable copying files that are attached to a Lead, to Accounts / Contacts / Opportunities.

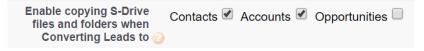


Figure 9-15

If you want to copy the files in one of your leads to converted contact, account or opportunity, all you have to do is to check the required checkboxes in S-Drive Configuration page, shown in Figure 9-15. (Also refer to section 8.2.9.2 Enable Copying S-Drive Files and Folders When Converting Leads To). Checking these boxes will activate a trigger called ConvertLead on Lead object.



ConvertLead trigger works for copying files from cg_Lead_File_c object to cg_AccountFile_c, cg_ContactFile_c, and cg_OpportunityFile_c based on your selection. If you enabled S-Drive for Leads, Accounts, Contacts or Opportunities by using your own custom file objects, this trigger will not be able to move your files from the lead to converted contact / account / opportunity.

You will be able to see your folders immediately after the conversion process, but for being able to see the files, you need to execute batch-jobs. *For more information on daily batch-jobs and SQueue, please see 'Select SQueue – daily batch jobs – execute time' section.* The conversion of lead files is handled with SQueue, and when the queue is executed, the files will be copied to the converted contact / account / opportunity, and you will be able to display your files.

9.4 Hidden Custom Settings

9.4.1 SDriveConfig

This section explains the hidden custom settings that are not exposed to the end users via "S-Drive Configuration" page. You can manage these configuration objects via **Setup -> App Setup -> Develop -> Custom Settings** menu. Then you can click **"Manage"** next to the **"SDriveConfig"** label and add these custom settings with appropriate values.

MultipartUploadThresholdSize: This configuration is used for HTML Upload and Java Upload Widget to decide normal upload or multipart upload based on the file size. Default is 5 MB. So, files above 5 MB (or configured value) will be uploaded via multipart upload mechanism, below 5 MB (or configured value) will be uploaded via normal upload mechanism that is used same way in Flash Upload Widget.

MultipartUploadPartSize: This configuration is used for HTML Upload and Java Upload Widget to split the file to be uploaded into parts for multipart upload. Default is 5 MB. This value can be between 5 MB and 5120 MB. So, if you'll upload a 50 MB file while this configuration is set to 5 MB, it'll split the uploaded file into 10 parts while uploading.

CustomPopupMessage: This configuration is used for HTML Upload to customize the default message in it. If you do not add this configuration, "*Drag files here or click Add (+) button to select files for upload.*" message is displayed by default.

9.4.2 ViewSettings

Custom Settings can be used to show different views of the S-Drive component to different users.

By default, the columns shown in S-Drive for both Classic and Lightning come from the S-Drive Configuration page/Customization Settings tab as shown here.



S-Drive Authentication Settings Gener	ral Settings	Custom	ization Settings	Mic
Display Object Fields This section allows a system administrator to change a You can add several custom fields to the object file an For more information please check <u>S- Drive Advanced</u>	d customize your attachmen	ts screen		
STEP 1:	STEP 2: Availab Hidden Fields Contact Contact File Name Deleted Last Modified By ID Last Modified Date Page Count Private Record ID Sync Id System Modstamp	le Fiel	ds of Select Displayed Fields File Name Created Date Created By ID Description File Size	
Custom Object S-Drive Config				

If the system admin changes these fields from the original default, S-Drive stores those in Custom Settings \rightarrow SDriveConfig, click manage and look for FS_cg_ContactFile_c or whichever object you want to check.

If a **user** changes the fields shown using the **Fields button** on the S-Drive Lightning Component, and clicks "save" (rather than "apply") then a new **ViewSettings** (Custom Settings → ViewSettings |Manage) will be created for that User. To go back to the defaults, delete the custom setting for the user.

^{Custom Setting} ViewSettin	gs		Help for this Page 🕑
If the custom sett	ing is a list, click New to add a new set o	f data. For example, if your application had a setting for country co	des, each set might include the country's name and dialing code.
If the custom sett general user.	ing is a hierarchy, you can add data for tl	he user, profile, or organization level. For example, you may want	different values to display depending on whether a specific user is running the app, a specific profile, or just a
		New	
 Default Organ 	nization Level Value		
View: All 🗸	Create New View		A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other A
		New	
Action	Setup Owner +		Location
View Edit Del	Claire SanNicolas		User
View Edit Del	Inne Doe		User









Different views for different users or profiles can also manually be created here by the system admin by clicking New.

vide values for the fields you created. This	data is cached with the application.
dit ViewSettings	Save
ViewSettings Information	
Location Object Selected Fields1 Object Selected Fields2 Object Selected Fields3 Object Sort Field1 Object Sort Field2 Object View Types1 Object View Types2 Object View Types3	

The format for these fields is Object1:field1;field2;field3,Object2:field1;field2,Object3:etc

Note:

- there is a colon (:) after an object
- semi-colons (;) separate fields
- a comma (,) separates the first object field group from the next object.
- If you run out of room to type in the first box, continue in the second box and so on
- Object Selected Fields is for setting which fields/columns are displayed in the component
 - cg_S3Object_c:cg_File_Name_c;CreatedDate;CreatedById;cg_Description_c;cg
 _Tags_c,cg_AccountFile_c:cg_File_Name_c;cg_Tags_c;
 cg_Content_Type_c
- Object Sort Field is for setting which field to sort on. The format is as follows:
 - cg_S3Object_c:CreatedDate:asc,cg_AccountFile_c:CreatedDate:desc
- Object View Type is for setting the view—list, thumbnail or grid. The format is as follows:
 - o cg__AccountFile__c:grid,cg__S3Object__c:thumbnail,cg__CaseFile__c:thumbnail





9.5 External Files

First, enable Files Connect, and let users access related external data sources Let Users and Administrators Access Files Connect Data Sources. For cloud-based data sources, create an authentication provider, and then define the source. Now users can access and share external files via the Files tab and feed, and search for them right alongside their Salesforce content.

Auth.	Provider

Auth. Provider Edit	Save & New Cancel	
Auth. Provider ID Provider Type	0SO8000000GmdX Open ID Connect	
Name	Mert'sGoogleDrive	
URL Suffix	Mert_sGoogleDrive	
Consumer Key	7	
Consumer Secret	4	
Authorize Endpoint URL	https://accounts.google.com/o/oauth2/auth?access_type=offline&approval_prompt=force	
Token Endpoint URL	https://accounts.googie.com/o/oauth2/token	
User Info Endpoint URL		
Token Issuer		
Default Scopes	https://www.googleapis	
Send access token in header		Send client credentials in header
Custom Error URL		
Custom Logout URL		1
Registration Handler	Q	
	Automatically create a registration handler template	
Execute Registration As	9	
Portal	None 🗘	
Icon URL		
Created Date	Choose one of our sample icons 2/23/2018 1:57 AM	
Created Date	2/23/2018 1:57 AM	
	Save Save & New Cancel	

Figure 9-16

Detailed explanation on how to configure files connect with external storage platforms and synchronize with salesforce is given in the following link;

https://help.salesforce.com/articleView?id=admin_files_connect_overview.htm&type=5

After configuring the data sources and objects, user is expected to create a new workflow rule for external outbound message trigger. That is, go to setup-> workflow rules, and select new button. And select object as ExternalFileMessage given the figure below. (Figure 9-17).





New Workflow Rule

Step 1: Select object		
Select the object to which this workflow r	rule applies.	
	Object ExternalFileMessage	
	51	

Figure 9-17

When save is clicked, user is now able to configure workflow, and supposed to fill the fields as given in the following figure. (Figure 9-18)

p 2: Configure Workflow Rule					
er the name, description, and criteria to trigger y	our workflow rule. In the	next step, associate	e workflow actions with	this workflow rule.	
it Rule		а			
Object	ExternalFileMessage	a			
Rule Name	xDriveMessageRule				
Description					٦
aluation Criteria					
Evaluate the rule when a record is:	 created created, and every till created, and any time 		quently meet criteria 👔		
b	Created, and every til		uently meet criteria 👔		
	 created, and every time created, and any time 		quently meet criteria 👔		
le Criteria Run this rule if the <u>criteria are met</u>	 created, and every time created, and any time 	e it's edited to subset			
te Griteria Run this rule if the <u>criteria are met</u>	created, and every til created, and any tim How do I choose?	e it's edited to subsect	Value	AND	
le Criteria Run this rule if the <u>criteria are met</u>	created, and every til created, and any tim How do I choose?	Operator not equal to	Value ©	AND AND	
le Criteria Run this rule if the criteria are met in Find ExternofFieldessage: Created Date (++None	Created, and every til Created, and any tim How do I choose?	Operator not equal to None	Value	AND AND	
In Criteria Run this rule if the criteria are met Field FortenalFile/Message: Created DateNoneNoneNoneNoneNoneNoneNoneNone	created, and every til created, and any tim created, and any tim How do I choose?	Operator not equal to None None	Value Columnation	AND	
In Criteria Run this rule if the criteria are met Finid ExternalFileMessage: Created Date None None None None	Created, and every til Created, and any tim How do I choose?	Operator not equal to None None	Value C C C	AND AND	
In Criteria Run this rule if the criteria are met Field FortenalFile/Message: Created DateNoneNoneNoneNoneNoneNoneNoneNone	Centedd, and every til Centedd, and any tim How do I choose?	Operator not equal to None None None	Value Columnation	AND AND	

- (a) "RuleName" : can be chosen anything but unique name for this defining rule.
- (b) "Evaluation Criteria": expected to be chosen as created.





(c) "Run the rule if the" : criteria are met

(d) "Field – Operator - Value": field is chosen as Created Date, and operator is 'not equal to' and value is set to blank.

In the next page user is expected to add workflow action to this rule.

Edit Rule xDriveMessageRule				
Step 3: Specify Workflow Actions				
Specify the workflow actions that will be triggered when the rule criteria are met. See an example				
Rule Criteria External FileMessage: Created Date NOT EQUAL TO null				
Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria				
Immediate Workflow Actions				
No workflow actions have been added				
Add Workflow Action				
Time-Dependent Workflow Actions See an example				
No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.				
Add Time Trigger				

Figure 9-19

(a) "Immediate Workflow Actions": Add workflow action is chosen as new outbound message

The new Outbound message should be configured as in the following figure.





New Outbound Message

Configure Outbound Message	
nter the details of your outbound message and sel	ct the fields you want included in this message. Note that the fields available depend on the type of record previously selected.
dit Outbound Message: ExternalFileMessage	а
Name Unique Name	xDriveMessage
Description	xDriveMessage
Endpoint URL User to send as	https://portal.sdriveapp.com/externalfiles/download
User to send as Protected Component	Demo SDrive 🔄 🥸 🧲
Send Session ID ExternalFileMessage fields to send	∞ <u>d</u>
	Available Fields Selected Fields CreatedByld Id
	IsDeleted LastModifiedByld LastModifiedDate Name Owmerld SystemModstamp C
	Remove cg_sDriveFolderId_c



- (a) "Name": Unique name for the outbound message
- (b) "Endpoint URL": should be given as https://portal.sdriveapp.com/externalfiles/download
- (c) "User to send as": should be chosen as system admin
- (d) "Send Session Id": should be checked
- (e) "Fields to Send": Created Date, and all the fields start with prefix cg__ should be chosen

And finally, user is expected to activate this workflow rule as given in the following figure. (Figure 9-21)





DriveMessageRule			
Workflow Rule Detail	Edit Delete Clone Activate		
Rule Name	xDriveMessageRule	Object	ExternalFileMessage
Active	° 🗆 👌	Evaluation Criteria	Evaluate the rule when a record is creat
Description	n 💆		
Rule Criteria			
Created By	y Demo SDrive, 6/7/2018 12:14 AM	Modified By	Demo SDrive, 6/7/2018 12:14 AM
Workflow Actions	P (0)		
Workflow Actions	Edk		
	Em		
Immediate Workflow Actions	East Description		
Immediate Workflow Actions			
Workflow Actions Immediate Workflow Actions Type Outbound Message Time-Dependent Workflow Actions See	Description		
Immediate Workflow Actions Type Dutbound Message Time-Dependent Workflow Actions See	Description aDrivetNessage		



By clicking the button Activate as given in (a), user should observe the Active checkbox to be checked in given (b).

After configuration, before starting the process, user is expected to go to FILES tab and activate files connect by clicking on according cloud storage platform and authenticating.

9.6 File /Attachment Sync

File/Attachment Sync takes files that are uploaded to Salesforce Files or Salesforce Attachments and syncs them with S-Drive for the selected object. Sync is processed based on a queue, so new items will appear in S-Drive in a few seconds/minutes.

Once you configure File/Attachment Sync with S-Drive, you can start using File/Attachment Sync features. See section 8.4.3 File/Attachment Sync to configure this feature.

Below is an example screenshot after user uploads an attachment to the Attachments section of the Cases. Attachment is uploaded into the S-Drive immediately.

		Atta	ch File View All
Action	File Name	Size	Last Modified Created By
Edit View Del	notes.png	143KB	1/13/2014 4:12 AM Demo CvanGate
No records to di Case Files Home		New	Folder] Upload File(s)] [Attach from 5-Drive Folders] [Email Selected] [Delete Selected] Total Items: 1 (Search
Actions	T File Name 📥 🔌		Created Date Created By ID Description File Size Case Case File Name Deleted Last Modified By ID Last Modified Date Record ID System Modstamp







Below is an example screenshot after user uploads a File to the Files section of the Accounts. It creates into the S-Drive.

Action Title		Last Modified		Created By			
Preview Download Del sample		26.07.2019 15:01		<u>Mustafa Aşçı</u>			
Back To Top		Always show me fe	ver 🔺 / 🔻 more records per related list	t			
Account Files		New Folder Upload Download Attach from S-Dri					
	$\langle \rangle$	Drag a	nd drop file(s)				
Home						ems in 1 page (Search	Q
□ ▼ ↓2 ▼ i ✿ View ▼	\sim						88 (B)
Actions T File Nam	ie*	Created Date	Created By ID	Description	File Size	Tags	
🗆 🕹 🗭 💌 👗 sample.	00	26.07.2019 15:01	Mustafa Aşçı		21.64 KB	>	
						1 items	s in 1 pag



You should also note that sync operation only happens once the file is uploaded to the Salesforce Files/Attachments section. Deletion or updates to the Salesforce File/Attachment do not delete or update the synced item in S-Drive section. Sync is triggered only with addition of a new Salesforce File/Attachment. Sync is only one way, so any changes to the S-Drive are not reflected to Salesforce File/Attachment. After sync'ing, those files/attachments are two distinct objects.

This process also does not sync the previously created Salesforce Files/Attachments before the sync configuration. You can sync those files with S-Drive navigating to "S-Drive Configuration - > Micro Services -> Sync Salesforce Files/Attachments with S-Drive -> Configure File Sync of Preexisting Files" section. See section 8.4.3 File/Attachment Sync for details.

Be sure to configure the outbound message user correctly:

Check Setup>outbound Messages for the following 3 items and check the "User to send as"

- AttachmentSync
- FileSync Callout
- **Preview Callout**

The "user to send as" profile must have Customize Application permission and Send Outbound Messages permission.

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9.7 S-Drive Reports

You can create File Activity reports for the S-Drive files. For Accounts, Cases, Contacts, Opportunities and S3Objects reports are enabled by default. For other standard/custom object files you need to create a lookup relationship under File Activity object:

Go to Setup -> App Setup -> Create -> Objects and click the "File Activity" object name. Scroll to the "Custom Fields & Relationships" for the object and click "New" button. In "Step 1. Choose the field type" screen, select "Lookup Relationship" and click "Next" button. In "Step 2. Choose the related object" screen, select "Related To" from the drop-down as your object file (e.g. My Example Object File) and click "Next" button. Keep default values for other steps and click "Save" button in the last step.

The following file activities are recorded by S-Drive and can be displayed in standard Salesforce.com reports:

1) S-Drive OneClick Download: When user clicks the file name or **"Download"** link in the S-Drive, the activity is saved with "S-Drive OneClick Download" type. This activity does not necessarily mean that the file has been completely downloaded to a user's desktop, instead user has clicked on the "Download" link and the download has been initiated. Since the "One-Click" downloads are handled by the browser, completion of the downloads cannot be tracked.

2) S-Drive CopyUrl Download: When user clicks "Copy URL" link in the S-Drive, the activity is saved with "S-Drive CopyUrl Download" type. This activity does not necessarily mean that the URL has been used to download a file, instead a URL has been created by a user.

3) S-Drive Zip & Download: When user starts a download using "Zip & Download", this type of activity is created.

4) S-Drive Email Sent: When user sent an email with attachments using S-Drive, this type of activity is created for each attachment. The comma separated recipients of the email are also stored in the "Additional Details" field of the File Activity.

To create S-Drive Reports, follow these instructions:

1. Click "Reports" tab and click "New Report..." button in the tab (Figure 9-24).



Home Chatter Files Can	npaigns L	eads Accounts	Contacts	Opportunities	Contracts	Cases	Solutions	Products	Reports
Reports & Dashbo	ards 🔤	ew Report New Das	shboard						
Folders	All Folders	;							
🔍 Find a folder	C Find roy	ports and dashboards							
All Folders		ports and dashboards							
🗀 Unfiled Public Reports	Action	Name						0	Fo
My Personal Custom R	•	🔟 Cases Report							My
🗎 My Personal Dashboards									
Account and Contact R									
Dpportunity Reports									

Figure 9-24

2. In the "Create New Report" screen, "Select Report Type" needs to be selected as "Other Reports". Scroll to the "File Activities" section of the "Select Report Type" and select the report type that you want to create. For example, if you want to get the report for Account Files you need to select "File Activities with Account File" from the list and click "Create" button. (Figure 9-25).

Select Report Type		
Q Quick Find	Preview	
Te Accounts & Contacts	No preview available.	
🕀 🧰 Opportunities		
🕀 🧰 Customer Support Reports		
🗄 🧰 Leads		
🕀 🦰 Campaigns		
🗄 🦲 Activities		
Contract Reports		
Price Books, Products and Assets		
🕀 🧰 Administrative Reports	=	
😑 🚘 Other Reports		
File Activities		
File Activities with Account File		
File Activities with Case File		
File Activities with Contact File		
File Activities with Opportunity File		
File Activities with S3Object		

Figure 9-25

3. After clicking "Create" button, report creation screen will be displayed (Figure 9-26). You can drag and drop the fields that you want in your report. For example, in the below screenshot it is displaying Account File Name, Account File Size, Activity Type, Additional Details and Created Date



columns. You can filter the results using the "Filters" section. To run the report using the actual data, you can click "Run Report" button or you can save the report for future use by clicking "Save" button. Please refer to the Salesforce.com documents about "Reports" for detailed information related to report creation.

Se onsaved Report	
Save As Close	eport Properties C Run Report
Fields All # Image: Comparison of the second	Filters Add ▼ Show My file activities Date Field File Activity: Created ▼ Range All Time ▼ From Image
a File Activity: Last Modified Alias ☐ Fie Activity: Last Modified Date ⊖ Account File: General a Account File: Account File Name	To add filters, click Add.
Account File: Account Account file: Content Type	Preview Tabular Format Show Remove All Columns
A Account File: Description	Account File: File Name Account File: File Size Activity Type Additional Details Account File: Created Date
Account File: File Name # Account File: File Size in Bytes Account File: File Size # Account File: File Size # Account File: Private Account File: Parent Folder Id	Grand Totals (0 records) No data was returned. Check report filters.

Figure 9-26

In "S-Drive Reports", two fields are important: "Activity Type" and "Additional Details". Activity types are explained at the beginning of this section. "Additional Details" field is important for the "S-Drive Email Sent" activity type and it stores the recipients of the email sent. You can get the details of the email by checking the contact's (or object's) Activity History.

Here is an example report for the Account Files (Figure 9-27).

Report Options:					
			Time Frame		
Summarize information by:	Show		Date Field	Range	
None	 My file ad 	ctivities 👻	File Activity: Created Date		•
Run Report 🔻 Hide Deta	ils Customize	Save As Printab	Die View Export Details	From	То
Run Report Hide Deta Account File: File Name				nal Details Account Fil	
		Size Activity Ty			
Account File: File Name	Account File: File	Size Activity Ty S-Drive On	ype Addition		e: Created Date
Account File: File Name My Test File.bxt	Account File: File 21 bytes	Size Activity Ty S-Drive On S-Drive Co	ype Addition eClick Download -		e: Created Date 8/11/2011

Figure 9-27









1. S-Drive Reports can only be run only for the actual files on the system. Deleted files are not included in the reports. Also changes to the files are reflected to the files. This is because objects are kept as references in the system and if that reference is updated/deleted, reference changes.

9.8 Email "S-Drive Folder" Files from an Object using a Custom Button

Note: This feature can be enabled by using "Attach from S-Drive Folders" button on any S-Drive object. Refer to "Emailing Files" section of S-Drive User Guide.

Instructions for Case Files are provided below, but you can follow the same instructions for Accounts, Contacts, Opportunities or other standard/custom objects:

- .1. Navigate to Setup -> Customize -> Cases -> Buttons, Links and Actions. Click New Button or Link button.
- .2. Fill in Label and Name fields, select Display Type, Behavior and Content Source areas as in the figure below then type window.open('apex/cg_Sdrive?objectId={!Case.Id}') into the formula area. If you would like to open S-Drive page as inline and without header, type window.open('apex/cg_Sdrive?objectId={!Case.Id}&inline=1') instead (Figure 9-28).

Custom Button or Li	and Long				Save	Quick Save	Preview	Cance
		Label	Email S-Drive Fil	e				
		Name	Email_S_Drive_F	ile	i			
	Na	mespace Prefix	cg					
		Description						
		Display Type	Detail Page Li	ink <u>View exam</u>	ple			
			Detail Page B	utton View exa	ample			
			List Button <u>Vi</u>	ew example				
		Behavior	Execute JavaSc	ript			• 1	/iew Be
	(Content Source	OnClick JavaSc	ript ▼				
Select Field Type		Insert Field						
Case	•	- Insert Merge	e Field 🔻	Insert Opera	ator 🔻			
window.open('apex	/Sdrive	?objectId={	!Case.Id}')					

Figure 9-28

- .3. Click Save button.
- .4. Make sure that you have added the custom button into Case page layout. You can't see the "Email S-Drive File" custom button on Case page, if you do not add to the Case object's page layout.
- .5. Open a case record and click on the custom button (Figure 9-29).





© 00001209						
Hide Feed Click to add topics						
🗭 Post 🎽 File 🔗 Link 📊 Poll			+ Follow			
Write something		Share	Followers			
Q, ∣ Show All Updates <i>→</i>			No followers.			
There are no updates.						
Case Detail Case Owner	Admin User [Change]	Edit	Close Case	Clone	Email S-Drive File	
Case Number	00001209					
Contact Name						
Account Name						
Туре						
Case Reason						
Date/Time Opened	12/17/2015 3:42 AM					
Created By	Admin User, 12/17/2015 3:42 AM					
Subject						
Description						
		Edit	close Case	Clone	Email S-Drive File	
	Figure 9)-29				

.6. Select files to send as an email and click Email button (Figure 9-30).

			Drag and dro	o file(s)
ome		4		
□ ▼ 1 [*] ₂ ▼ i	* 0		🗈 i 🌣 View 🕶	
Actions	т	File Name 🔺	Created Date	
10 a -	GIF	PurpGuy.gif	9/4/2019 8:20	AM
±Q 🗊 💌		sdrive tab folder	9/19/2019 7:16	AM
10 a -	JPG	Shandy, jpg	9/4/2019 8:20	MA



.7. You can see that "Related to" field is populated with related Case (Figure 9-31). Fill in the other fields and click **Send** button.





	Send Select Template Close
Email Format	Text-Only [Switch to HTML]
То	Test Contact
Related To	Case: 00001209
Additional To	
cc	
BCC	
Subject	About the Case
	Never Expires
Attachment Expiration	
Expiration	Details-
Attachment Expiration 2 attachment(s)	Details~

100	~.		_	0	2	4
- E I,	g١	ur	e	9	-5	ь.

.8. You can follow the same instructions for other objects. If you would like to create a custom button on Account, apply all the instructions for Account object and type "objectId={!Account.Id}" into formula area, instead of "objectId={!Case.Id}" while creating a custom button on Account. For any object, type "objectId={!ApiNameOfAnyObject.Id}" into formula area.

10 PROFILE PERMISSIONS, OWD, AND SHARING RULES

S-Drive is sharing-aware, meaning that it will respect the organization-wide default (OWD) sharing settings and sharing rules applied on S3Objects (files uploaded to the S-Drive Tab) and other S-Drive file objects. Account Files, Case Files, Contact Files and Opportunity Files are set to "Controlled by Parent" in the OWD and cannot be changed. S3Ojbects and Lead Files can be set to Private, Public Read Only, or Public Read/Write.

Additionally, for S3Objects (files on the S-Drive Tab), you can manually share files and folders using the "share option" on the dropdown action menu.



S-Drive does not remove the buttons and menus from the user interface based on restrictions. This is due to the limitations of Salesforce.com APIs. All restrictions are enforced while users are attempting different operations. For example, if a user tries to delete a file where the user has read only access, the user will be able to click on the "Delete" button for that file, however user will not be able to delete the file and a warning message will indicate that the user does not have sufficient privileges to delete that file.

10.1 Profile settings for S-Drive Objects

You can apply profile-based permissions on S-Drive custom object files. S-Drive supports four different access levels:

- None
- Read
- Read + Create + Edit and
- Read + Create + Edit + Delete

To set these profile-based permissions go to **Setup** and find **Profile**s, and edit the profile you want to change.

Note that you cannot change the standard profiles' permissions. You may need to clone them before you can edit.

Inside the Edit screen of the selected profile, scroll down to the "**Custom Object Permissions**" section. You'll see the "**Basic Access**" selections for your custom object files. You will need to check/uncheck these boxes based on your needs (Figure 10-1). Note that again you can edit "Custom Object Permissions" for just "Custom Profiles". You may need to *clone* your standard







profile to be able to edit a profile. Refer to the Salesforce.com documentation for more information.

	Basic Acc	ess			Data Adminis	tration
	Read	Create	Edit	Delete	View All	Modify All
Account Files	V	V	~	V		
Case Files	✓	V	✓	✓		
Contact Files	~		~			
Contract Files	✓	V	✓	✓		
My Example Objects	V		✓	V		
My Example Object Files			✓			
Opportunity Files	 Image: A set of the set of the		 Image: A set of the set of the	V		

There are four access levels: **Read**, **Create**, **Edit**, and **Delete**.

10.1.1 S-Drive File Object Permissions

10.1.1.1 No Permissions Enabled

If you uncheck all boxes for your standard/custom object file, your users belonging to this profile won't be able to see the S-Drive file area at all, so they won't be able to do anything with custom object files.

Note: "No Permission Enabled" is not supported for S3Objects custom object.

10.1.1.2 Just Read Permission Enabled

Allows users to

- Email files
- Download files
- copy URL of file to clipboard

Does not allow users to

- upload files
- delete files
- edit description of files

10.1.1.3 Read, Create and Edit Permissions Enabled

Allows users to

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- Email files
- Download files
- copy URL of file to clipboard
- upload files
- edit descriptions of files

Does not allow users to

• delete files

10.1.1.4 Read, Create, Edit and Delete Permissions Enabled

Allows users to

- Email files
- Download files
- copy URL of file to clipboard
- upload files
- edit descriptions of files
- delete files

10.1.1.5 Permission Combinations That Are Not Supported for Attachment Files

Permission combinations other than above examples are not supported by S-Drive and we strongly recommend you not to use unsupported permission combinations.

10.1.2 Other S-Drive Object Permissions

In order to access all of S-Drive's features, enable permissions for the following objects:

- AttachmentSyncs
- File Activities
- MyS3Objects
- Previews
- S3Configs
- S3Objects





- SDriveCustomActions
- SQueues
- SURLS
- SURL Hits

10.2 **Organization-Wide Default Sharing Settings**

To set Organization-Wide Defaults, go to Sharing Settings in Setup.

Organization-wide defaults and "Grant Access using Hierarchies" work for S-Drive objects the same as for any other object. If Grant Access Using Hierarchies is enabled, users have full access to files and folders owned by users in roles below them in the hierarchy, including the ability to upload files to folders of users below them and create sub-folders for users below them.

The following table shows what users can do with other users' files and folders in S-Drive, not considering role hierarchies. If hierarchies is enabled, users can access files and folders of users in roles below them in the hierarchy as if they owned the files/folders themselves.

Permission	See	Download	Edit	Delete	Cut	Сору	Upload	Create Folders
Private	х							
Public Read	х	х						
Only								
Public	х	х	х	х	х	х	х	х
Read/Write								

10.3 Sharing Rules Settings

You can give Read Only or Read/Write access levels to S3Objects by creating Sharing Rules. S-Drive file objects are controlled by parent with the exception of Lead Files.

Go to **Sharing Settings** in **Setup** and scroll down to the "S3Object Sharing Rules" to create a new rule.

Note that sharing rules can only be used to grant wider access to data, not to restrict access.

Sharing Rules for S3Object or other standard/custom objects are not supported for "Public Read/Write and Hierarchy Enabled", because this is the widest access option to the data.

Setting data access to the widest and trying to restrict is not supported by Salesforce.com.





So, first you need to restrict data access using "organization-wide default sharing settings". Then, you can apply sharing rules to S3Objects or other standard/custom objects.

10.4 Manual Sharing with Action Menu Share option

Manual sharing is supported for files uploaded to the S-Drive Tab only—those files not associated with a standard or custom object. If the OWD for S3Objects (representing the S-Drive Tab files) is set to Private, then the "Share" action menu time will be available for a selected file or folder. (Figure 10-2)

↑	1 T	ð •		e	lii	â	X	ø	Ē	5	
🧧 sdrive tab folder	ног	ME									
	Show	100	🕻 pe	r page.							
		ACTI	ONS	TYPE			v				
	<	₹	â	•	G	F	Purp	Guy.g	çif		
		₹	â	•]	sdriv	e tab	folde	r	
		*	â	•	JPG		Shandy.jpg				
				Oper							
				Сору	URL						
				Deta	ils						
				Dele							
				Shar	e ic Shar						
				Publ	c Shar	6					

Figure 10-2



11 S-DRIVE IN SALESFORCE.COM COMMUNITIES

11.1. Enabling Communities for Your Organization

Click Setup -> App Setup -> Customize -> Communities -> Settings (Figure 11-1).

App Setup
Customize
Tab Names and Labels
▶ Home
Activities
Chatter
Communities New!
Settings
Figure 11-1

In the "Communities" page, first check "Enable Communities" checkbox. Then type a unique domain name that will be used in all your communities. Note that this name can't be changed after you save it. Click "Check Availability" button and if "Success" message is shown click "Save" button (Figure 11-2).





Communities					
Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. Learn more					
To get started with communities, you must first enable it and select a domain.					
Save					
Enable communities					
Important: Once you enable communities, it cannot be disabled. Enabling communities also permanently turns on the new user interface theme and the universal header. Learn more 🕼 Enable communities					
Select a domain name					
Important: The domain name will be used in all of your communities and can't be changed after you save it Sample Domain Name MyCompany.force.com MyCompany.force.com/developers MyCompany.force.com/partners Opmain name Cyangate-test October-edition.na7.force.com Check Availability					
Success! Domain name available					
Save					

Figure 11-2





11.2. Creating a New Community

Once you enable Communities for your organization, you can create new communities (Figure 11-3). You can click "New Community" button to create a new community.

Manage Communities							
Success! You can now create new communities.	Success! You can now create new communities.						
The list shows all communities in your organization. Clicking on the Community Name link	takes you directly to the Community. If you're not a member, the Community Name is not a link.						
All Communities New Community							
No Communities							

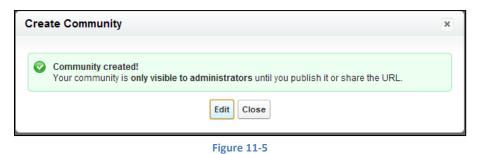
Figure 11-3

Type in the details of the new community and click "Create" button (Figure 11-4).

Create Community		×
* Name	Test Community	
Description	Testing S-Drive features in <u>Salesforce</u> Communities	
URL	cyangate-test-developer-edition.na7.force.com / test	
After creating a commun publish it or share the U	ity, you can continue to customize it. It is visible only to administra RL.	tors until you
	Create	

Figure 11-4

Once you click the "Create" button community will be created in a few seconds (Figure 11-5).







11.3. Configuring S-Drive for Community

After creating the community click the "Builder" link to configure the newly created community (Figure 11-6).

Communities	6			Visit our Trailblazer Community Help for this Page			
	he list shows all communities in your organization. Clicking on the URL takes you directly to the Community. If you're not a member, the URL isn't linked. aximum number of communities: 100 🕕						
All Communities		New Commu	unity				
Action	Community Name	Description	URL	Status			
Workspaces Builde	sdrivefansLightning		https://sdrivefans-developer-edition.na70.force.com/sdrivelightning	Active			
Workspaces	lder - Record 1 - sdrivefansLightning		https://sdrivefans-developer-edition.na70.force.com/sdriveclassic	Preview			

Figure 11-6

Click "Tabs"

11.4. Configuring S-Drive Lightning Component for Lightning Communities

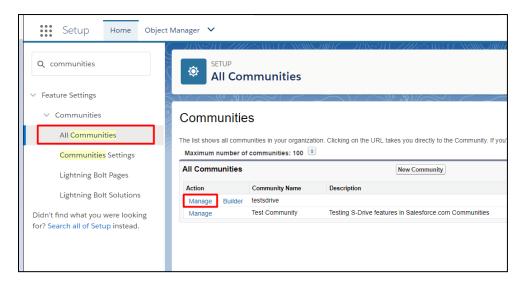
Salesforce offers a Community Builder comes with rich, responsive templates (E.g Napili) for communities targeted at customer support scenarios. You can follow the steps below configure S-Drive Lightning Component for Lightning based communities.

1- Navigate to Setup \rightarrow All Communities \rightarrow Manage.

150









2- You can select your lightning compatible template from Administration \rightarrow Settings.

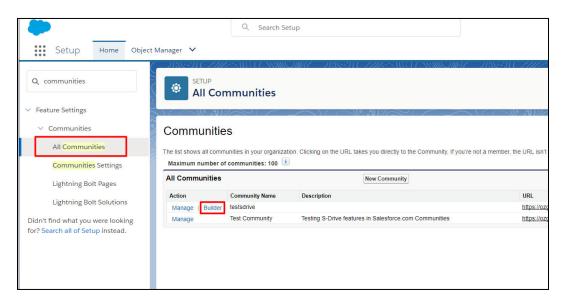
ashboards	testsdrive 🖉
Engagement	https://ozgurdemo-developer-edition.eu5.force.com/serhatdemo
Moderation	Status Active Deactivate
* Topics	Template Customer Service (Napili) Change Template
Recommendations	
X Administration	
Members	
Login & Registration	
Emails	
Preferences	
Pages	
Settings	







3- Navigate to Setup \rightarrow All Communities \rightarrow Builder.





4- Select a page to add S-Drive component.

Community Builder 🔻	Case Detail	\$ ·	Case Detail	•	C
	Pages	×			
	Q Case	٥			Search
≡ 0	OBJECT PAGES Case Detail	•••			
÷	Case List Case Related List		номе	٦	FOPICS v

Figure 11-10





5- Open Components menu, scroll down and locate S-Drive Lightning Component. (Figure 11-11)

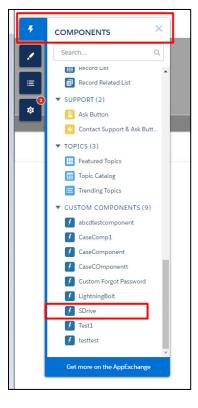


Figure 11-11





6- Drag & Drop S-Drive Lightning Component to your page.

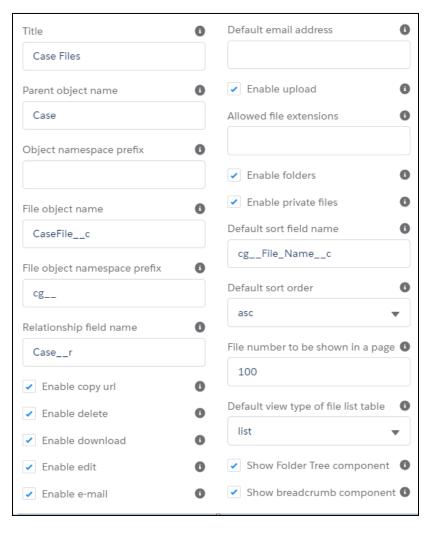
SUMPORTING Image: Sum of the sum of	unity Builder + Case Detail 10 + Case Detail + C ⁴			
Cark back We Know Know Know Ki From Know Ki From Know Ki From Know Ki From Know Know K	COMPONENTS	Туре		Ozgūr Yeşilbaş created this case.
VEXCES ATTORNET[01] VEX.0000 Vex.00000 Vex.0000000000 Vex.000000000000000000000000000000000000		Case Reason		00001028
Image: Image				View more details
I case stards stards I mode stards <td></td> <td>Web Email</td> <td>Web Company</td> <td>🖞 Like 🍈 Comment</td>		Web Email	Web Company	🖞 Like 🍈 Comment
Busch storer Busch storer <td></td> <td>Web Name</td> <td>Web Phone</td> <td>Write a comment</td>		Web Name	Web Phone	Write a comment
Hends Monada Ball Hends Monada Hends Hends Monada Hends Monada Hend	Record Banner	Date/Time Opened	Date/Time Closed	
Montanie		07/01/2016 07:25		
SAMedian A shadian Council by Council by Council by		Product	Potential Liability	
Contact layout 3 As Ast. Contact layout 3 As Ast. Contact layout 3 As Ast. Contact layout 3 Ast Ast. Contact Ast Ast. Contac		SLA Violation		
torics Di	S Ask Button			
Address A	Contact Support & Ask Butt			
Source Sourc	▼ TOPICS (3)	Cagür Yeşilbeş, 07/01/2016 07:25	Ozgür Yeşilbeş, 07/01/2016 07:25	
	E Featured Topics	Subject		
	Tople Catalog			
	Trending Topics	Description		
Conscience C	▼ CUSTOM COMPONENTS (9)			
Cauch Inspects Cauch In				
			4 Shim	
C Datah hoga Pasavor C Datah hoga Pasavor C generative S Series C Datah hoga Pasavor C Datah hoga Pasavor			, control	+ ×
C Springering C Sprin	-	S-Drive Files		O, Search
Continue on the Application Official	-			
C text worker cet nove onthe Agekontung: Cet nove onth				
Cat nove on the Appendix	Test1			
Get more on the Applicituation	Testtest	Show	100 🗘 per page.	0 file(s).
Official	Get more on the Applochange		No	records found.
		4		O file(s).

Figure 11-12





7- Click on the component in the page and then start filling component attributes.





The component attributes are explained below;

1. Title (optional)

This is the title of the page block inside the object page. You can set it to "My Example Object Files". This field is optional and if you don't provide a value for this field, it will be set as "S-Drive Files".





2. Parent object name

This is the name of the custom or standard object that will be the object that the files will be attached to.

For Case Files: Parent Object name = Case.

For Account Files: Parent object name = Account.

For Contact Files: Parent Object name = Contact.

For Opportunity Files: Parent object name = Opportunity.

For Other Standard Object Files: Parent object name = Name of your standard object (E.g. Lead)

For Custom Object Files: Parent object name = API Name of your custom object (E.g. My_Example_Object__c)

If you are adding S-Drive Tab (S3Object) to the communities, Parent object name will be empty.

3. Object namespace prefix (optional)

This is the object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you have a custom object inside your organization, your object namespace prefix is same with your organization namespace prefix. If this object belongs to a managed package, you need to use that managed package's namespace prefix. If your object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is "exampleprefix" you need to manually set objectNamespacePrefix as "exampleprefix_".

For Case, Account, Opportunity, Contact and other standard objects this attribute will be empty.

For Custom Objects, this attribute will be set as your organization prefix.

4. File object name

This is the name of your object file. This object will be holding the information regarding the attached files. For our example, it is "My_Example_Object_File__c" or "CaseFile__c".

For Case: File object name = CaseFile__c.
For Account: File object name = AccountFile__c.
For Contact: File object name = ContactFile__c.
For Opportunity: File object name = OpportunityFile__c.
For Custom Object: File object name is your custom object file API Name (E.g.
My_Example_Object_File__c).





If you are adding S-Drive tab (S3Object) to the communities, file object name will be "S3Object__c"

5. File object namespace prefix (optional)

This is the file object's namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you have a custom object file inside this organization, your file namespace prefix is same with your organization namespace prefix. If this file object belongs to a managed package, you need to use that managed package's namespace prefix. If your file object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is "exampleprefix" you need to set File object namespace prefix as "exampleprefix_".

For Case Files, Account Files, Opportunity Files, Contact Files and S3Object (S-Drive Tab) this attribute will be set as "cg___" For Custom Object Files, this attribute will be the name of your organization prefix.

6. Relationship field name

Master-detail relation used for selected standard/custom object. This attribute is optional and default value is 'Parent__r'.

7. Enable copy URL (optional)

This option is used to enable/disable "Copy URL" link in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "Copy URL" link for each asset. The default value for this checkbox is checked.

8. Enable delete (optional)

This option is used to enable/disable "Delete" option for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "Delete" link for each asset. The default value for this checkbox is checked. Note: Deleted files are put in the recycle bin. The recycle bin is not automatically emptied.

9. Enable download (optional)

This option is used to enable/disable "Download", "Open" and "Zip & Download" options for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see





the "Download" link for each asset. The default value for this checkbox is checked.

10. Enable edit (optional)

This option is used to enable/disable "Edit" option for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "Edit" link for each asset. The default value for this checkbox is checked.

11. Enable e-mail (optional)

This option is used to enable/disable "E-Mail" option for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "E-Mail" link for each asset. The default value for this checkbox is checked.

12. Default email address (optional)

You can use this option, if you want to set a default "Additional To" email address for sending emails from your S-Drive Attachments. For example, if you select an Account S-Drive Attachment for an account and click "Email" button, "Email Files" screen will be opened and "Additional To" field will be filled with the email address you have provided here.

13. Enable upload (optional)

This option is used to enable/disable "Upload" option for all attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "Upload File(s)" link for each asset. The default value for this checkbox is checked.

14. Allowed file extensions (optional)

You can use this option, if you want to limit the file types to be uploaded into selected object's S-Drive attachments. Semicolon separated list of file extensions that are allowed to upload can be written here. This attribute is optional and leaving this empty will allow all kind of files to be uploaded. For example, "*.jpg, *.txt" will limit the files to be uploaded to jpg and txt files.

15. Enable folders (optional)

This option is used to enable/disable folder support for S-Drive attachments in the page. There are two possible values for this attribute: "true" or "false". If the checkbox is checked, this means that the value is set to true, and you will be able to see the "New Folder" button. The default value for this checkbox is checked. If the box is not checked, the "New Folder" button





will be removed from the toolbar section.

16. Enable private files (optional)

This option is used for enabling public/private file access to the S-Drive attachments and commonly used to limit the customer portal users' access to individual files. Set this attribute to true by checking the checkbox, if you want to enable private/public flag. Setting the private flag on a file hides the file from customer portal users. The default value for this checkbox is unchecked.

17. Default sort field name (optional)

This option is used to order/sort S-Drive attachments based on a field. You need to set the name of the field that should be used to order the list of files. For this example, it should be filled in as "cg___File_Name__c". You can change this option from the settings button located at the toolbar of S-Drive attachments anytime. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

18. Default sort order (optional)

This option is used to set the sort order direction of the S-Drive attachments. There are two possible values for this attribute: "asc" or "desc". The default value is "asc" which stands for ascending. You can change this option from the settings button located at the toolbar of S-Drive attachments anytime. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments*.

19. File number to be shown in a page (optional)

This option is to set the number of files to be shown in an attachment page. The default value for this section is set to 100. If this value is set to '30' and object has 91 total items, the files will be displayed in 4 pages. You can change this option from the pagination setting located under the toolbar of S-Drive attachments. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

20. Default view type of file list table (optional)

This option is to set the default view type of the file list table. There are 3 options you can choose: List, Thumbnail and Grid. You can change this option from the toolbar of S-Drive attachments, and set it as default by using the settings button. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*





21. Show Folder Tree component (optional)

This option sets the default behavior of the folder tree component located on the left-hand side of the S-Drive attachments page. You can choose to hide or show the Folder Tree component by using the settings button on the toolbar of S-Drive attachments. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments.*

22. Show breadcrumb component (optional)

This option sets the default behavior of the breadcrumbs located on the left-hand side of the S-Drive attachments page, above the folder tree component. You can choose to hide or show the breadcrumbs by using the settings button on the toolbar of S-Drive attachments. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments*

23. Enable Chatter (optional)

This option helps users to collaborate with each other using the native Chatter app. Once enabled, in order to leverage Chatter, on the Actions menu of a file, a user can click on Post to Chatter. Alternatively, on the Details page of a file, there is Chatter tab. *See S-Drive Lightning User Guide for more information about using the S-Drive attachments*

8- Once configuration is complete, you can publish your changes from top right corner. (Figure 11-14)

Community Builder - Case Detail	☆・ Case Detail ・ C		5	∂ ₽	0	Publish	Previe
۶ ✓ ≅	SLA Violation Created By Created By Created By Creater Yegilbay, 07/01/2016 07:25 Subject Description			SDRIVE Title Case File Parent obj Case Object nar File object CaseFile	ect name nespace p name	refix	
	Case Files		×	File object	namespac	e prefix	0
	★ ↓ ✓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓			Relationsh		me	0
	Show 100 + per page.	0 file(s) 0 file(s)		 Enable Enable Enable Enable 	e copy url e delete e downloac		0 0 0

Figure 11-14

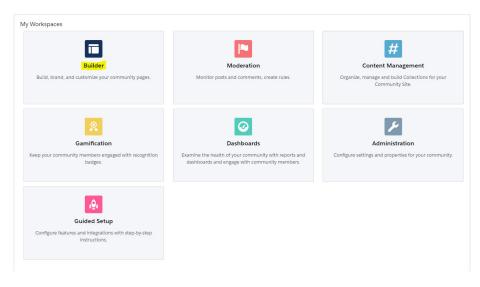




11.5. S-Drive Toolbar Color Configuration for Lightning

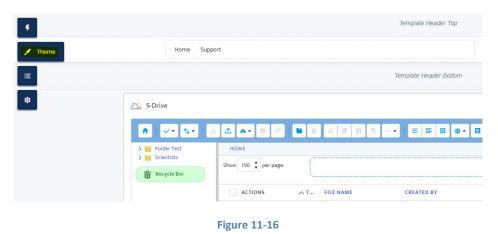
You can configure the toolbar color of S-Drive in *Salesforce Communities*. In order to reach communities, you should go to *Setup/Communities/All Communities* and select the community where you want to change the toolbar color of S-Drive.

From community page, you should go to *Builder* section.





From *Builder*, you should click to *Theme* button.







After clicking the Theme button, you should click the arrow button at the top right and click Edit CSS there.

Theme	▼×	
Customer Account Portal	Manage Branding Sets C() Edit CSS C() + ++++++++++++++++++++++++++++++++++	
Colors	> der Test entists > cycle Bin	HOME Show 100 🗘 per page.
A Fonts	>	ACTIONS AT FILE NAME

Figure 11-17

Then you should come into this page.

Edit CSS Use custom CSS to override the default template and Branding panel styles. We recommend that you use custom CSS sparingly, because future releases of template components might not support all CSS customizations. Tips: - Press CTRL • SPACE to see more CSS properties Save a backup copy of your custom CSS code.		
	Cancel	Save

Figure 11-18

In this section, you can change the S-Drive toolbar color as you wish. You can use *Color Name*, *Hex Color Code*, or *RGB Color Code* to change the toolbar color. For instance, if you want to add *Color Name* to change the toolbar color as light coral, you should write:

.slds-grid.community-toolbar {background: lightcoral}





1	_slds-grid.community-toolbar {background: lightcoral}		
		Cancel	Save

Figure 11-19

After clicking the save button at bottom right, you should see the change immediately.

<u>∠S</u> S-Drive				Se	arch	Q
↑ ✓• 1↓• ⊴ ₫ 8	• 🔤 🧷 I 🖿 💼	X 8 8 7	= = = = ∞ • ■			
> 🧮 Folder Test HOME	> SCIENTISTS					
Scientists Show 10	D0 🗘 per page.			Drag and drop file(s))
A(CTIONS ^ T	FILE NAME	CREATED BY	FILE SIZE	DESCRIPTION	TAGS
	* * *	Albert Einstein.jpg	CyanGate CyanGate	47.07 KB		theory of general relativit
	1 a 🔹 💦	Nikola Tesla.jpg	CyanGate CyanGate	16.6 KB		alternating current

Figure 11-20

Secondly, if you want to change the toolbar color by using a *Hex Color Code* that is a green like color, you should write it as:

.slds-grid.community-toolbar {background: #0C9F27}

1	_slds-grid.community-toolbar {background: #0C9F27}		
		Cancel	Save
	Figure 11-21		

After clicking the save button at bottom right, you should see the change in the toolbar.



↑	L L A	∃ 5	8		
Folder Test	HOME > SCIENTISTS				
Scientists	Show 100 🗘 per page.		Drag and drop file(s)	
	ACTIONS A T FILE NAME	CREATED BY	FILE SIZE	DESCRIPTION	TAGS
	Albert Einstei	n.jpg CyanGate CyanGate	47.07 KB		theory of general relativit
	🗌 🛃 💼 💌 💦 Nikola Tesla.ju	g CyanGate CyanGate	16.6 KB		alternating current

Figure 11-22

Finally, if you want to change the toolbar color by using the *RGB Color Code* that is a purple like color, you should write it as:

.slds-grid.community-toolbar {background: rgb(79, 18, 140)}

<u>∔</u> 1	1 "slds-grid.community-toolbar {background: rgb(79, 18, 140)}								
		Cancel	Save						



<u>CS</u> S-Drive				Search	Q
≜ i v • tu • i		····• : = = = = = •			
Folder Test Scientists	HOME > SCIENTISTS				
Recycle Bin	Show 100 🗘 per page.		Drag and drop file(s		
	ACTIONS A T FILE NAME	CREATED BY	FILE SIZE	DESCRIPTION	TAGS
	Albert Einstein.jpg	CyanGate CyanGate	47.07 KB		theory of general relativit
	🗆 🛃 💌 💏 Nikola Tesla.jpg	CyanGate CyanGate	16.6 KB		alternating current

Figure 11-24





11.6. Security Settings

To enable profiles for selected community, use the "Members" section in the "Community Settings" page.

Based on the profile of the community user, users can have different permissions in S-Drive.

If you try to access the community with no permissions, you'll see "You do not have permissions to access S-Drive data!" error when you click the "S-Drive" tab (Figure 11-25).

Test Community
Cases S-Drive
You do not have permissions to access S-Drive data!



If you just enable "read" feature, community users will just be able to download or email uploaded files by internal users. They won't be able to upload a file, delete a file, create a folder or edit an item's description. Also note that visibility of the files list, buttons and menu items are affected via sharing and S-Drive Configuration.

To set these permissions edit the selected profile using the Administration Setup -> Manage Users -> Profiles menu. Click on the name of the profile you want to edit (Figure 11-26).

Assigned Profiles	Edit Profiles	Assigned Profiles Help 🥝
Profile		Users
Portal Manager Clone		3

Figure 11-26

In the new window click Edit button to edit the user permissions (Figure 11-27).

Profile Portal Manager Clone		Help for this Pooe 🤇						
« <u>Back to List: Users</u>								
Users with this profile have the permissions and page I	ayouts listed below. Administrators can change a user's prot	file by editing that user's personal information.						
If your organization uses Record Types, use the Edit li	If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.							
Profile Detail	Edit Clone Delete View Users							
Name Portal	Manager Clone							
User License Custor	ner Portal Manager	Custom Profile 🖌						



Scroll down to the "**Custom Object Permissions**" section. You'll see the "**Basic Access**" selections for "**S3Objects**" custom object (or if you're working on S-Drive Attachments like Cases, Accounts, custom

165	All Rights Reserved - CyanGate LLC



objects etc. you need to edit the custom object file's permissions). You will need to check/uncheck these boxes based on your needs (Figure 11-28). Note that you can edit "Custom Object Permissions" for just "Custom Profiles". You may need to *clone* your standard profile to be able to edit a community profile. Refer to the Salesforce.com documentation for more information.

There are four access levels: **Read, Create, Edit, and Delete**. We'll see examples of these access level combinations in the subsections.

	Basic Access		Data Administration			
	Read	Create	Edit	Delete	View All	Modify All
\$30bjects						
Case Files	V					

Figure 11-28

You can set access levels for customers using communities. We strongly suggest you to just set the "Read" access to the community users for data security.

A. Example 1: Just Read Permission Enabled

If you just set "Read" and unset other permissions for selected custom object (here S3Object) (Figure 11-28), your community users won't be able to:

- upload files
- create folders
- delete files/folders
- edit descriptions of files/folders
- cut/copy files
- rename files/folders.

They will be able to:

- browse folders
- download files
- email files
- copy the URL of the file to the clipboard.



In the S-Drive screen, "Email" and "Download File(s)" buttons will be displayed (if Download Manager is enabled) for community users and for each file "Download" and "Copy URL" item menu actions will be visible. "Item Actions" menu will be hidden for folders (Figure 11-29).

	iger-205027-dev	-edcguna35.visual.t	orce.com/apex/SDrive?sfdc.tabName	=01r41000001Bn2q&vfRetURLInSFX	=%2Fhome%2Fhome.jsp		☆ 🚺 🛛	6 0
force						Logged in as Jac	x Rogers (blenercioglu	@cyangat
e Ceses Solutions Reports S-Drive								
Folders	Home						Search	٩.)
				I OView -				
	Actions	I File Name		Created Date	Created By ID	Description	File Size	
		Open	ld pro	1/31/2018 7:09 PM	Jack Rogers			
	0 4 .	Download	ek-kisa-sac-modelleri-2016.jpg	1/31/2018 7:10 PM	Jack Rogers			
		Copy URL					2 items in	in 1 pages
		Details						
		Eoit Rename		Home Cases Solutions Reports S-D	nve			
		Delete						
		Upload New Version	1					
		Previous Versions						
S-Drive Salesforcdocx ^ Bi image1.	png	^					S	Show all

B. Example 2: Read, Create and Edit Permissions Enabled

If you set Read, Create, Edit permissions and unset Delete permission for selected custom object (here S3Object) (Figure 11-30), your community users won't be able to:

- delete files/folders
- cut/copy files.

	Basic Access		Data Administration			
	Read	Create	Edit	Delete	View All	Modify All
\$30bjects						
Case Files		V				

Figure 11-30

They will be able to:

- upload files
- create folders
- browse folders





- download files
- rename files/folders
- edit descriptions of files/folders
- email files
- copy the URL of the file to the clipboard.

In the S-Drive screen, "New Folder", "Upload File(s)", "Email" and "Download File(s)" (if Download Manager is enabled) buttons will be displayed for community users and for each file "Download", "Edit", "Rename" and "Copy URL" action menu items will be visible. "Edit" and "Rename" action menu items will be visible for folders (Figure 11-31). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.

M Inbox (297) - bfenerciog × M (no subject) - burakt	f@gr ×	2.1 Document Update G	× Customer Portal	× 😌 Open S-Drive Configurat 🗙			Burak - O
← → C △ ● Secure https://curious-badger	r-205027-dev	-edcg.na35.visual.for	e.com/apex/SDrive?sfdc.tab	Name=01r41000001Bn2q&vfRetURLInSFX	=%2Fhome%2Fhome.jsp		🛧 🗖 🗉 📴 💋
solesforce 13 Home Cases Solutions Reports S-Drive						Logged in as Jac	Log
☆ Folders	Home						(Search Q)
			🔤 ! 🖿 🗙 ! 🛪 d	2 E I OView			
	Actions	<u>I</u> <u>File Name</u> ▲		Created Date	Created By ID	Description	File Size
	A ×	- Alanmedonald g	ng	1/31/2018 7:09 PM	Jack Rogers		
	A ×	Open	-k-kisa-sac-modelleri-2016 ipg	1/31/2018 7:10 PM	Jack Rogers		
		Copy URL					2 items in 1 pages
L		Details					
		Edit		Home Cases Solutions Reports S-D	rive		
		Rename Delete					
		1418					
		Upload New Version Previous Versions					
🕼 S-Drive Salesforcdocx \land 💁 image1.png		^					Show all

Figure 11-31

C. Example 3: Read, Create, Edit and Delete Permissions Enabled

If you set Read, Create, Edit, Delete permissions for selected custom object (here S3Object) (Figure 11-32), your community users will be able to:





	Basic Access				Data Administration			
	Read	Create	Edit	Delete	View All	Modify All		
\$30bjects	V		V					
Case Files			V					

Figure 11-32

- upload files
- create folders
- browse folders
- download files
- delete files/folders
- edit descriptions of files/folders
- cut/copy files
- rename files/folders
- email files
- copy the URL of the file to the clipboard.

In the S-Drive screen, "New Folder", "Upload File(s)", "Email", "Download File(s)" (if Download Manager is enabled), "Cut", "Copy", "Paste" and "Delete File(s)" buttons will be displayed for community users and for each file "Download", "Edit", "Copy URL", "Rename" and "Delete" item menu actions will be visible. "Edit", "Rename" and "Delete" action menu items will be visible for folders (Figure 11-33). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.





M Inbox (297) - bfenerciog: × M (no subject) - burakf@g:: ×	21 Document Update G 🗙 🗭 Customer Portal 🛛 🗙	Upen S-Drive Configurat X		-	- C - X
← → C ☆ 🔒 Secure https://curious-badger-205027-dev	-edcg.na35.visual.force.com/apex/SDrive?sfdc.tabNam	=01r41000001Bn2q&vfRetURLInSFX=	%2Fhome%2Fhome.jsp		☆ 🚺 🔍 🖪 🥥 🗄
Soliesforce 411 Home Cases Solutions Reports S-Drive				Logged in as Jac	Logeut k Rogers (blenercioglu@cyangate.com
# Folders Home					(Search Q)
	1 + 0 0 = 1 5 × 1 × 2 1	I OView			
Actions	I File Name.*	Created Date	Created By ID	Description	File Size
	💌 🎆 🛌	1/31/2018 7:09 PM	Jack Rogers		
	Open bownload	1/31/2018 7:10 PM	Jack Rogers		
	Copy URL				2 items in 1 pages
	Details				
	Edit Rename Delete	Home Cases Solutions Reports S-Ori	ve		
	Upload New Version Previous Versions				
S-Drive Salesforcdocx ^ 🕒 image1.png	<u>^</u>				Show all X

Figure 11-33

D. Permission Combinations That Are Not Supported

Permission combinations other than above examples are not supported by S-Drive and we strongly recommend you not to use unsupported permission combinations.

E. Other Issues

If you get an "INVALID FIELD" error message like below while uploading a file after giving required permissions, you may need to check the "Field Accessibility" settings for the selected profile under Administration Setup -> Security Controls -> Field Accessibility menu:

Operation Failed
INVALID_FIELD: Select s.Id, s.cg_WIP_c, s.CreatedById, s.CreatedDate ^
ERROR at Row:1:Column:14 No such column 'cg_WIP_c' on entity 'cg_S3Object_c'. If you are attempting to use a custom field, be sure to append the '_c' after the custom field name. Please reference your WSDL or the describe call for the appropriate names. [object Object]
ОК



"Hidden" fields for the selected custom object (here S3Object) needs to be set as "Visible" from this menu.

12. S-DRIVE SALESFORCE MOBILE APP CONFIGURATION AND USER GUIDE

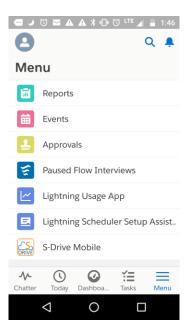
You can configure the Salesforce Mobile app to show the S-Drive tab as well as showing files on Accounts and other objects.

12.1 For S-Drive Tab (S3Object)

In order to display S-Drive Tab on Salesforce Mobile App Navigation Menu, add the S-Drive Mobile Tab to Salesforce Mobile App Navigation Menu.

- Go to Setup and type "Salesforce Navigation" in the quick find box and click on it
- Add S-Drive Mobile Tab from the Available section to the Selected section.
- Click Save

You can now see S-Drive Mobile on Salesforce Mobile App navigation menu



Tap on S-Drive Mobile to see your S-Drive Tab files.





12.2 For S-Drive on objects

To view S-Drive in the mobile app on objects such as Accounts, Cases, etc, you'll need to edit the object's Lightning page, add the S-Drive Lightning component and configure its form factor for phone. The steps are as follows and are done from within Salesforce on your desktop (not from the Mobile app.)

- Edit the Lightning page for the object where you want to configure S-Drive for mobile. •
 - Either go to the Object through Setup and go to Lightning Record pages and edit the page
 - Or go to a record for the object (for example, go to an Account) and click the gear wheel and Edit Page.
- From the list of components on the left side, drag the S-Drive Lightning component and drop it on the page.
- Configure the component as you would normally do, but check the box for "Use Compact View". (For how to configure the component, see section 5.2 S-Drive File Area for Lightning (Accounts, Cases, Contacts, Opportunities, Leads) or section 7.2 Creating Lightning Page for custom objects.)
- Under "Set Component Visibility" at the bottom of the configuration, choose "Add Filter."
- Under Filter Type, choose Device.
- Configure it for Form Factor Equals Phone
- Click Save

Note:

- You probably already have an S-Drive component on your page. Set the form factor for ٠ that one to Form Factor Equals Desktop.
- If you'd like S-Drive to show in Compact View on your Desktop, you can configure just one S-Drive component. The component will show in both Desktop and Phone by default.





13. S-DRIVE SUPPORT

You can contact S-Drive Support team for any questions or problems that you couldn't solve using S-Drive documents:

- 1. Open a Ticket at Support Site: sdriveapp.com/support
- 2. Send an Email: sdrive@sdriveapp.com

You can find up-to-date product information, documents, tutorial videos, tools in our web page: <u>www.sdriveapp.com</u>



A Appendix A: S-DRIVE PORTAL

A.1. S-Drive Account

In order to use S-Drive, you should create a free S-Drive account on S-Drive portal. Here you will be able to see your Amazon account and payment details.

A.1.1. Login or Register

• Go <u>https://portal.sdriveapp.com</u>. Register for a free account, or login if you already have an account.

2	<mark>S</mark> _DRIV	Έ
Logir	1	
Email		
Passwo	rd	
	Login to S-Drive	
Forgot	Password? Register for	r Free

Figure A-1

- A.1.2. Update S-Drive Account Information or Password
 - Click *Account* link on menu (Figure A-2) to update your account information (Figure A-3) or change your password (Figure A-4).







Edit Account Change Password	
Name *	
CyanGate	
Email *	
user@cyangate.com	
Email Confirmation *	
user@cyangate.com	
Company Name CyanGate LLC	
Phone Number	
18333269778	
Address	
8593 Concord Hills Circle Cincinnati, OH 4	
PO Number	
4LPH4 NUM3R1C4L	
Update	
Figure A-3	
Edit Account Change Password	
Current Password *	
lew Password *	
assword Confirmation *	
••••••	
Change	
Figure A-4	





A.2. Connected Organizations

In order to use S-Drive, you must connect your Salesforce.com organization to S-Drive.



* You can connect your organization if you use 1.24 or higher version of S-Drive and if you have enough privileges to make OAuth authorization.

A.2.1. Connect Salesforce.com Organization

 Click Connected Organizations link on the menu (Figure A-5). You see "Connect Salesforce.com Organizations" and "Connected Salesforce.com Organizations" sections (Figure A-6).



 To connect an organization, click "Production Instance" button if your organization will be leveraging S-Drive in production environment. Alternatively, click "Sandbox Instance" button if your organization is leveraging S-Drive in sandbox environment (Figure A-7). It redirects the salesforce.com login page. You should login with your organization's account.





- Click 'Allow' button for S-Drive to have permission to connect the app
- You should now see your organization(s) on "Connected Salesforce.com Organizations " section (Figure A-7).

Connected Salesforce.co	m Organizations					
Action	OrganizationId	Туре	User Name	Date Created	Date Updated	Organization Status
Reconnect Delete	00DA00000000000000001	PRODUCTION	user@cyangate.com	10/27/2014 11:18	11/14/2014 15:43	CONNECTED
Reconnect Delete	00Db00000000000002	PRODUCTION	cyangate@cyangate.com	10/24/2014 14:53	10/24/2014 14:53	CONNECTED
Reconnect Delete	00DL0000000000003	SANDBOX	testuser@cyangate.com	11/02/2014 11:32	11/13/2014 17:38	CONNECTED
			·• A 7			



If you see your organization in *DISCONNECTED status* (Figure A-8), you should connect your organization again by clicking "Connect" button OR to reconnect, click on "Production Instance"/ "Sandbox Instance" button (Figure A-6). You can also reconnect your *CONNECTED status* organization by clicking "Reconnect" button (Figure A-7).







A.2.2. Remove Salesforce.com Organization from S-Drive Account

• Click "Delete" button (Figure A-8). But, beware that you are responsible with deleted organization's usage costs until different account is connected from this organization.

A.3. Amazon Payment

Add an Amazon payment method if your S-Drive trial has expired. S-Drive is always free in Sandboxes.

A.3.1. Register Payment Method

• Click *Payment Method* link on menu (Figure A-9).



• It opens *Amazon.com Sign-in* page (Figure A-11). You should login with your Amazon account.



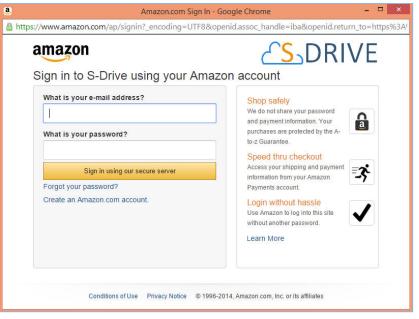


Figure A-11

After login, select a *Payment Method*, then check the consent box and click the "Approve" button (Figure A-12).





VISA Visa1111			
✔ Visa1111	VISA	MasterCard4444	-
American Expr00	05	Discover9424	DISCOVER
1-4 of 5		Amazo	n Paymer Priva
a Pay with Amaz	zon		

- Figure A-12
- After you complete the payment method registration, you see billing details related to Amazon account on "Billing Details" section (Figure A-13).

This account is registered to be payed via Amazon Payments using the Amazon account amazonuser@cyangate.com . If you would like to make any changes to your payments, use the Login button below to make changes.				
Billing Details	Date Created	Date Updated	Payment Method Status	
amazonuser@cyangate.com	11/08/2014 13:14	11/08/2014 13:14	OPEN	
Amazon Payment 3 , Login with Amazon				

Figure A-13





If you see CLOSED payment method status (Figure A-14), you should • update your payment method again by clicking "Login with Amazon" button. You can also change or update your method by clicking "Login with Amazon" button.

There is a problem with Amazon account amazonuser@cyangate.com. You can update your payment details by clicking the Login button.					
Billing Details					
Amazon Email	Date Created	Date Updated	Payment Method Status		
amazonuser@cyangate.com	11/08/2014 13:14	11/08/2014 13:14	CLOSED		
Amazon Payment					

Figure A-14

A.4. Billing

You can see payment details and your organizations' usages and cost for the current month on "Billing" tab.

A.4.1. Payment Details

Click Billing link on menu (Figure A-15). You see "Current Usage" (Figure A-16) and "Payment History" sections (Figure A-17).





<mark>८ऽ</mark>DRIVE

Current Usage								
OrganizationId	Туре	Organization Status	Current Total Usage	Current Timed Usage*	Current Month Cost	Preview Generation Count	Preview Cost	Total
00D8000000000g5qEAA	PRODUCTION	CONNECTED	2.216800 GB	1.000647 GB-Month	\$0.01	0	\$0.0	\$0.01
00D0Y000001KFkcUAG	PRODUCTION	CONNECTED	1.030524 GB	0.465170 GB-Month	\$0.00	0	\$0.0	\$0.0
00D0Y000001iwkJUAQ	PRODUCTION	CONNECTED	0.000000 GB	0.000000 GB-Month	\$0.00	0	\$0.0	\$0.0
00D0Y000001dQRhUAM	PRODUCTION	CONNECTED	0.029071 GB	0.013123 GB-Month	\$0.00	0	\$0.0	\$0.0
00D80000000ThiTEAS	PRODUCTION	CONNECTED	0.001045 GB	0.000468 GB-Month	\$0.00	0	\$0.0	\$0.0
00D0Y000002FEpDUAW	PRODUCTION	CONNECTED	0.000185 GB	0.000083 GB-Month	\$0.00	0	\$0.0	\$0.0
00D58000000JXjnEAG	PRODUCTION	CONNECTED	0.000655 GB	0.000296 GB-Month	\$0.00	0	\$0.0	\$0.0
00D800000012avGEAQ	PRODUCTION	CONNECTED	4.480871 GB	2.022624 GB-Month	\$10.23	0	\$0.0	\$10.23



- Under "Current Usage", you can see your organization's usage and cost for the current month.
- The "Preview Generation Count" column shows your organization's Preview Generation Count for the current month.
- The "Preview Generation Cost" column shows your organization's Preview Generation Cost for the current month.

To see payment details for previous months, select a month from "Payment History" select list (Figure A-17).

Payment History	
August 2018	*
Select	
August 2018	
July 2018	
June 2018	
May 2018	
April 2018	

Figure A-17

 You can see the details of your payments on "Payment Details" section (Figure A-18). You can see billing cycle, payment status, your organizations' billable usages and usage amounts. You can also download PDF invoices using the "Download Invoice" button (see section A.4.2 Downloading Invoices for details.)





Payme	ent History	
Augus	t 2018 🔻	
ayme	ent Details	
Charg	es billed on August 1, 2018	Download Invoice
Billing	Cycle : July 1 - July 31, 2018	
ltem	Description	Amount
1	00D00000000qhCWUAY PRODUCTION ORG USED 2.5371	35 GB, BILLABLE USAGE 2.537135 GB \$15.37
2	00D00000000qhCWUAY PRODUCTION ORG PREVIEW SE	RVICE PAYMENT: \$ 0.0, CONVERSION MINUTE COUNT: 2 \$0.0
3	00D1r000002FANWEA4 PRODUCTION ORG USED 0.0 GB	BILLABLE USAGE 0.0 GB \$0.00
4	00D1r000002b37rEAA PRODUCTION ORG USED 0.008109	GB, BILLABLE USAGE 0.008109 GB \$0.00
	Total Amount:	\$15.37
Charge	es Due on August 1, 2018	

Figure A-18

If there are active organizations and the total amount is not zero, if your organization has been charged, a "Payment received" message is displayed (Figure A-18). If your organization has not been charged yet, "Payment processing" message is displayed (Figure A-19).

Charges Due on December 1, 2014		
- Payment processing Thank you!		
	E'	

Figure A-19

• If there are no active organizations on the billing cycle, there will be no payment cost and you see "No payment required" message (Figure A-20).





Payment Det	tails	
Charges billed	d on December 1, 2014	Download Invoice
Billing Cycle :	November 1 - November 30, 2014	
Item	Description	Amount
1	There are no active organizations.	\$0.00
	Total Amount:	\$0.00
Charges Due o	on December 1, 2014	
- No payment re	required - Thank you!	

Figure A-20

A.4.2. Downloading Invoices

You can download invoices using the "Download Invoice" button which is displayed in the top row of "Payment Details" page (Figure A-20), every time you select a new month from the "Payment History" menu.

For example, if you've selected "August 2018" from the "Payment History" menu and click the "Download Invoice" button, an invoice for your usages in the billing cycle July 1-July 31, 2018 will be downloaded automatically by your browser.





Your billing information (*name, company, address, PO number*) will be the same as your account information, which you can change using the "Edit Account" tab (see A.1.2 Update S-Drive Account Information or Password).

If you download an invoice for an already-closed payment, your invoice will come with a "PAID" stamp on the top-right corner.

CyanGate LLC 8593 Concord Hills Cir Cincinnati, OH 45243 US (703) 485-3884 sales@cyangate.com http://www.cyangate.com		PA	
Invoice			
BILL TO		INVOID	E # b50e5f8-20180801
CyanGate		DA	ATE 08/01/2018
CyanGate LLC		DUE DA	ATE 08/01/2018
8593 Concord Hills Circle Cincinnati, OH 45243		TER	MS Due Upon Receipt
PO NUMBER			
4LPH4 NUM3R1C4L			
ACTIVITY	QTY	RATE	AMOUNT
S-Drive Service	1	15.37	15.37
00D0000000000hCWUAY PRODUCTION ORG USED 2.537135 GB, BILLABLE USAGE 2.537135 GB			
S-Drive Service	1	0.00	0.00
00D00000000000000000000000000000000000			
S-Drive Service	1	0.00	0.00
00D1r000002FANWEA4 PRODUCTION ORG USED 0.0 GB, BILLABLE USAGE 0.0 GB			
S-Drive Service	1	0.00	0.00
00D1r000002b37rEAA PRODUCTION ORG USED 0.008109 GB, BILLABLE USAGE 0.008109 GB			
		TOTAL CHARGES	USD 15.37
		AMOUNT PAID	USD 15.37
		BALANCE DUE	USD 0.00

Figure A-21





A.4.3. Pricing

S-Drive pricing is based on usage and preview generation count (Figure A-23) and it is calculated by Cyangate at the beginning of the next month and charged from your payment method. S-Drive pricing is tiered and as your usage increases, the cost per usage will decrease significantly (Figure A-22).

Price of S-Drive Usage	Pricing Tiers
\$10.00 per GB-Month	First 5 GB-Month
\$5.00 per GB-Month	Greater than 5 GB-Month through 25 GB-Month
\$2.50 per GB-Month	Greater than 25 GB-Month through 100 GB-Month
\$1.25 per GB-Month	Greater than 100 GB-Month through 1000 GB- Month
\$0.50 per GB-Month	Greater than 1000 GB-Month

Figure A-22

	8, thumbnails a humbnail and p		generated. Calculation is done ba	sed on the number of conversions used while	
100 conversions are free for each month! Preview & Thumbnail Sample Pricing Table *					
Preview & Thun	nbnail Sample P	Pricing Table *			
Preview & Thun File Count	nbnail Sample P Conversion (Total Price		
			Total Price \$0.00		
File Count	Conversion (Count Price			
File Count	Conversion C	Count Price \$0.00	\$0.00		
File Count	Conversion (100 1000	Count Price \$0.00 \$0.05	\$0.00 \$45.00		
File Count 50 500 2500	Conversion (100 1000 5000	Count Price \$0.00 \$0.05 \$0.04	\$0.00 \$45.00 \$205.00		



- First 1 GB storage and bandwidth usage is FREE every month.
- After creating an S-Drive account, you can use S-Drive on Salesforce.com organizations free of charge for 15 days.





• You can use S-Drive on Sandbox Salesforce.com organizations free of charge.

A.5. Troubleshooting Tips

- Could not login because of locked S-Drive account.
 - Your S-Drive account has been locked because of too many invalid attempts. You can reactivate your account by resetting your password.
- Could not login because of inactive S-Drive account.
 - > Check your email address to activate your S-Drive account.
- Forgot S-Drive account password.
 - Reset your S-Drive account password.
- 15 day trial has expired for S-Drive usage.
 - Add your Amazon payment details. See "Register Payment Method" section of this document.
- See DISCONNECTED *status* on "Connected Organizations" or "Billing" page.
 - You may revoke the S-Drive connected app or uninstall the S-Drive package. You can connect this organization. See "Connect Salesforce.com Organization" section of this document.
- See CONNECTED status organization on "Connected Organizations" or "Billing" page, although uninstall the S-Drive package or revoke the S-Drive connected app.
 - Your organization status will be DISCONNECTED, after next time we try to connect your Salesforce.com organization to calculate hourly S-Drive usage.
- Could not see DELETED organization on "Connected Organizations" or "Billing" page.
 - You could not see DELETED organization. But this organization belongs your S-Drive account until another S-Drive organization connect this. Also, you can reconnect this organization. See "Connect Salesforce.com Organization" section of this document.
- Could not use S-Drive, although there is a *CONNECTED* status organization.
 - > You may uninstall the S-Drive package or revoke the S-Drive connected app.





- Can use S-Drive, although there is a *DISCONNECTED* status organization.
 - > You can continue to use S-Drive max more 6 hours, after revoke the S-Drive connected app. After this, you could not use S-Drive.
- Non-admin user could not make "OAuth Authorization-Connect Organization".
 - Only administrator user who has modify all data permission can make "OAuth Authorization-Connect Organization".
- Could not complete "OAuth Authorization-Connect Organization" because of necessity for installing latest version (1.24 or later) of S-Drive package.
 - > You must install 1.24 or later versioned S-Drive package.
- Could not complete "OAuth Authorization-Connect Organization" because of there is an organization which already authorized with different S-Drive account.
 - > You could not connect other S-Drive account' organization until this account delete the organization.
- Could not see *Connect Salesforce.com Organization* section and *Connect-Reconnect-Delete* buttons on "Connected Organizations" page.
 - If your Amazon payment detail is CLOSED status, you could not connect your organization. Update your Amazon payment details to continue use S-Drive. See "Register Payment Method" section of this document.
- Could not make "OAuth Authorization-Connect Organization" for other organization shortly after authorizing one organization.
 - Clear your browser cookies and session, then retry make "OAuth Authorization-Connect Organization".
- Get an email from us related AMAZON ACCOUNT issue.
 - We could not charge you for S-Drive usage because of you did not add your Amazon payment detail. Add your Amazon payment details. See "Register Payment Method" section of this document.
- 15 days' trial has expired for S-Drive usage.
 - Add your Amazon payment details. See "Register Payment Method" section of this document.





- Get an email from us related *INVALID PAY MENT METHOD* issue.
 - We could not charge you for S-Drive usage because of Invalid Payment Method issue. Update your Amazon payment details to continue use S-Drive. See "Register Payment Method" section of this document.
- Get an email from us related CLOSED AMAZON PAYMENT issue.
 - We could not charge you for S-Drive usage because of *CLOSED* status Amazon payment method related Invalid Payment Method issue. Update your Amazon payment details to continue use S-Drive. See "**Register Payment Method**" section of this document.
- See CLOSED *status* Amazon payment detail on "Payment Method" page.
 - The Amazon billing detail turned to CLOSED because of INVALID PAYMENT METHOD issue. Update your Amazon payment details to continue use S-Drive. See "Register Payment Method" section of this document.
- Could not use S-Drive, although update Amazon payment details for Payment Method and see *OPEN status*.
 - Because of there is uncompleted payment charge due to INVALID PAYMENT METHOD issue, you can continue to use S-Drive after payment charge is completed.
- See "Payment processing..." message on Billing Details section of "Billing" page.
 - > We have not charge you yet for S-Drive usage.
- See "Session Expired" message on portal.sdriveapp.com page.
 - > Because of your session has expired, you should login again.
- See error messages on Login, Reset Password, Register, Connected Organizations, Payment Method, Account pages.
 - > Try your operation. If you got error message again, please contact to us.
- See "You did not register a S-Drive account. Please register for free, then configure S-Drive connectivity for this organization at https://portal.sdriveapp.com" message on Salesforce.com account.
 - Create a free S-Drive account or use your existing S-Drive account, then connect your organization to S-Drive. See "Register" and "Connect Salesforce.com" sections of this document.



- See "You did not configure S-Drive connectivity for this organization. Please configure S-Drive connectivity for this organization at https://portal.sdriveapp.com" message on Salesforce.com account.
 - Connect your organization to S-Drive. See "Connect Salesforce.com" section of this document.

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• See "There is a problem with your S-Drive connectivity with this organization. Please check your account, organization status and reconnect this organization at http://portal.sdriveapp.com"

message on Salesforce.com account.

- Reconnect your organization to S-Drive. See "Connect Salesforce.com" section of this document.
- See "Your trial has expired. Please add your payment details at https://portal.sdriveapp.com " message on Salesforce.com account.
 - Add your Amazon payment details. See "Register Payment Method" section of this document.
- See "There is a problem with your payment method. Please update your payment details at https://portal.sdriveapp.com" message on Salesforce.com account.
 - Update your Amazon payment details to continue use S-Drive. See "Register Payment Method" section of this document.





B Appendix B: Upgrading S-Drive

Follow these instructions to upgrade to the latest version of S-Drive

- 1. Install the latest version of S-Drive
- 2. If you have custom objects from your previous S-Drive version, there are fields that must be added to the associated S-Drive File Objects. (For example, if you have a custom object called Software that is using S-Drive, there's related object called SoftwareFile that must be updated.) S-Drive can do this automatically:
 - Open S-Drive Configuration tab.
 - On the General Settings tab, scroll down to Object Field Settings.
 - Click on the Sync button. This will add fields to your S-Drive File Objects that are needed in the upgraded version.

S-Drive Authentication Settings	General Settings	Customization Settings
S-Drive Tab Settings		
Enable Download	•	
Enable Chatter	•	
Disable Copy URL on S-Drive Tab		
Enable Email on S-Drive Tab 🗹	disable for portal users	
Select page size for S-Drive tab	100 •	
1.1.0.00		
Mail Settings		
Mail Settings Custom Email Footer	Default Email Footer	
0	Default Email Footer Unlimited minute(s)	
Custom Email Footer		
Custom Email Footer	Unlimited minute(s) •	
Custom Email Footer	Unlimited minute(s) •	

Figure B-1



3. Once the Object sync is done, go to each of your custom file objects and check that all the fields have been added correctly. If any are missing, add them manually as described in the table below. You can ignore these steps for CaseFiles, AccountFiles, ContactFiles, **OpportunityFiles and S3Object):**

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- Go to Setup and navigate to your S-Drive File Object's fields and relationships. Be sure to • check the S-drive File Object, not your custom object. (Staying with the example above, check the SoftwareFile object, not the Software object.)
- If any of the following fields are missing, create them manually. ٠ Note: In each step you should check Visible checkbox for all Field-Level Security for Profile fields.

Field Label	Field Name	Data Type
Text(255)	Content Type	cgContent_Typec
Long Text Area(32000)	Description	cgDescriptionc
Text(255)	File Name	cgFile_Namec
Formula (Text)	File Size	cgFile_Sizec
Number(18, 0)	File Size in Bytes	cgFile_Size_in_Bytesc
Checkbox	Is Deleted	cg_ls_Deletedc
Checkbox	Is Latest Version	cg_ls_Latest_Version_c
Checkbox	Is Parent Deleted	cg_ls_Parent_Deletedc
Text(255)	Key	cgKeyc
Number(18, 0)	Page Count	cgPage_Countc
Master-Detail(CustomObjectName)	Parent	cgParentc
Text(255)	Parent Folder Id	cgParent_Folder_Idc
Text(255)	Preview Key	cg_Preview_Key_c
Text(255)	Preview Version Id	cgPreview_Version_Idc
Checkbox	Private	cgPrivatec
Text(255)	Shortcut	cgShortcutc
Text(255)	Sync Id	cgSync_Idc
Long Text Area(4096)	Tags	cgTagsc
Text(255)	Thumbnail Key	cgThumbnail_Keyc
Text(255)	Thumbnail Version Id	cgThumbnail_Version_Idc
Text(255)	Version Description	cgVersion_Descriptionc
Text(255)	Version Id	cgVersion_Idc
Checkbox	WIP	cgWIPc



If you would like to use S-Drive Versioning feature, open S-Drive Configuration tab and click Enable Versioning button to activate version upload feature. Important Note: If you enable versioning you can't disable it later.

Note that Preview & Thumbnail feature will be auto enabled for S-Drive Folders (S3Object), and Preview & Thumbnail will be generated for your future uploads to S-Drive Folders in 2.1. You can disable this feature from S-Drive Configuration Tab. You can also check Preview & Thumbnail conversion pricing <u>here</u>.

Amazon Region and Remote Site Settings

After switching to Signature Version 4, your AWS S3 bucket region is now required information for S-Drive to work. If you are upgrading to any S-Drive version after 2.5.1 for the first time, it is highly advised to configure your Amazon Credentials and your S3 bucket again. If this is not done it is likely you will get an error when using S-Drive.

Enhanced Email and Lightning Email Component

If you cannot install S-Drive and the message from Salesforce regards to Enhanced Email being disabled, please go to Setup > EnhancedEmail > Enable from Salesforce Lightning Experience.





C Appendix C: Troubleshooting

- [Problem] I'm getting "Failed: Unauthorized endpoint, please check Setup->Security->Remote site settings. endpoint = https://s3.amazonaws.com/?......" error.
 [Solution] You forgot to set or deleted Remote Site Settings. Go to Setup -> Security -> Remote Site Settings and add this site: https://s3.amazonaws.com
- [Problem] My mail message contains "????" for some language-specific characters in email clients (Outlook, Thunderbird etc.).
 [Solution] Go to Setup -> Personal Setup -> My Personal Information -> Personal Information. Edit User Detail and set Email Encoding to Unicode (UTF-8).
- [Problem] Salesforce sharing is not working.
 [Solution] Sharing is only supported for S-Drive Folders. Both, S-Drive Folders and S-Drive Attachments are sharing-aware that means they will respect the sharing rules applied on S-Drive objects.
- [Problem] Percent character (%) is replaced with an underscore character (_) while downloading.
 [Solution] This is a technical limitation.
- [Problem] Some special characters (e.g. ğ, ş, ı) can't be typed into text fields on Apple Macintosh.

[Solution] This is a limitation related to Flash Player's Macintosh version. This issue will be addressed in later releases.

- [Problem] Special characters in file names are URL encoded for Firefox browser. [Solution] This is a limitation of Firefox.
- [Problem] If a sub folder is deleted parent folder's (+) sign stays there until clicked Home and refreshed.
 [Solution] You need to refresh the S-Drive tab.
- [Problem] If folder has no sub folders, tree's folder icon is closed whether we click on it or not. [Solution] This is only a visual problem and it will not affect the operation of the application.





- [Problem] S-Drive tab for Lightning Experience is not visible after installation.
 - [Solution] Go to Setup->Profiles->Edit Your Profile->Tab Settings and then set S-Drive Tab to "Default On". This issue occurs if you install S-Drive 2.5 before deploying my domain. This is a known issue of Salesforce. You can visit this <u>link</u> for further information.