



# **S-Drive**

## **Customer Portal Guide**

### **v2.0**

#### ***Important Note***

This guide contains information about S-Drive Customer Portal usage. Refer to the *S-Drive Installation Guide*, *S-Drive Advanced Configuration Guide* and *S-Drive User Guide* for more information about installing/ configuring S-Drive product.



[www.cyangate.com](http://www.cyangate.com)

## Contents

A.	S-Drive Customer Portal Screen.....	2
B.	Enabling S-Drive Tab for Customer Portal Users .....	3
C.	Enabling Custom Objects for Customer Portal .....	4
D.	Editing Customer Portal Profiles .....	5
1.	Example 1: Just Read Permission Enabled .....	6
2.	Example 2: Read, Create and Edit Permissions Enabled .....	7
3.	Example 3: Read, Create, Edit and Delete Permissions Enabled .....	8
4.	Permission Combinations That Are Not Supported for S3Objects .....	9
E.	S-Drive Support .....	10

## A. S-Drive Customer Portal Screen

Customer Portal users can access S-Drive Folders and S-Drive Attachment screens if the Salesforce.com account's system administrator enables S-Drive for the Customer Portal users (Figure 1, Figure 2):

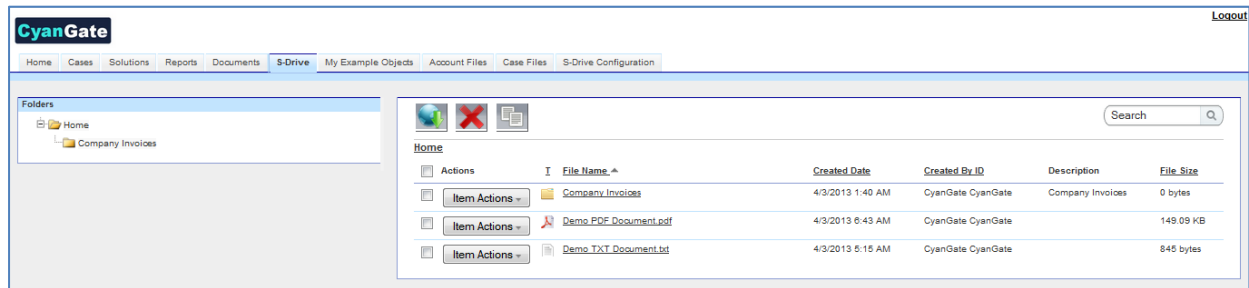


Figure 1

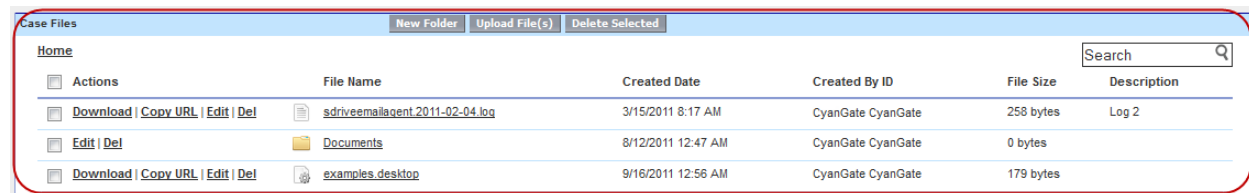


Figure 2

Note: Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities. Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities.

## B. Enabling S-Drive Tab for Customer Portal Users

Go to **Setup -> App Setup -> Customize -> Customer Portal -> Settings** to access Customer Portal settings. Click on your Customer Portal name that you want to edit (Figure 3).

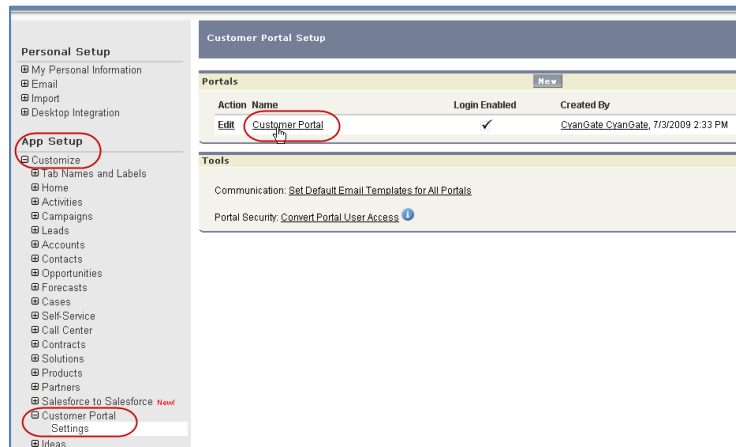


Figure 3

In the new page you can see the details of the portal. Click **“Customize Portal Tabs”** button at the top right of the **“Portal Detail”** section. (Figure 4)

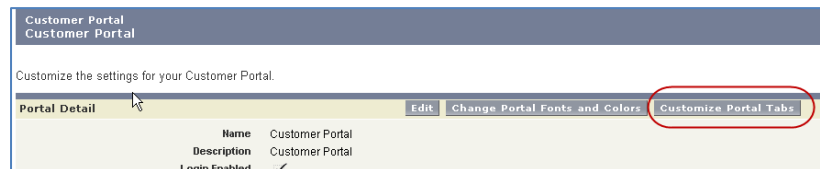


Figure 4

After clicking the button, you’ll see the **“Portal Tab Set Editor”** screen (Figure 5). Select S-Drive from **“Available Tabs”** and click **“Add”** button to add it to the **“Selected Tabs”**. Click **“Save”**.

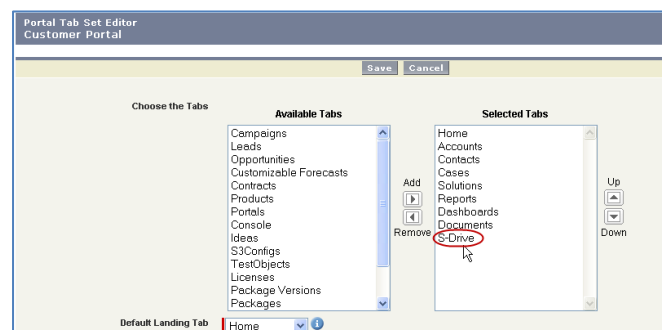
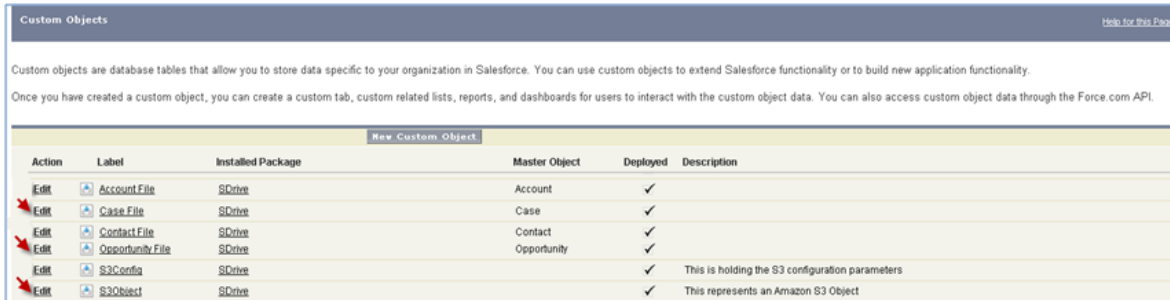


Figure 5

## C. Enabling Custom Objects for Customer Portal

To use S-Drive in Customer Portal, you must enable customer portal access for new custom objects that came with S-Drive package.

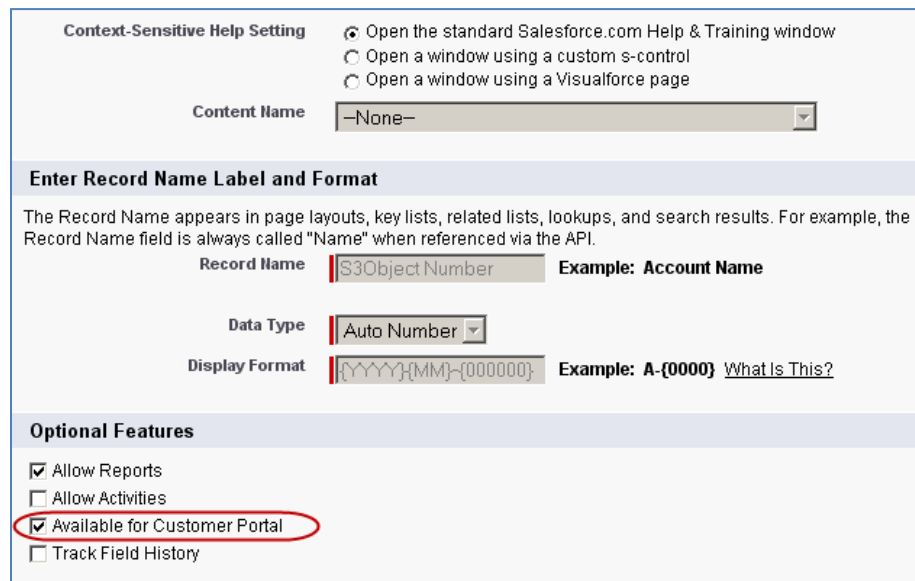
- 1- Go to **Setup -> App Setup -> Create -> Objects**. You need to edit some options for **S3Object** custom object to use S-Drive tab in your Customer Portal. Also if you want to use **Case Files** or other custom objects for your customer portal you need to enable for them also (Figure 6).



Action	Label	Installed Package	Master Object	Deployed	Description
<a href="#">Edit</a>	<a href="#">Account File</a>	SDrive	Account	✓	
<a href="#">Edit</a>	<a href="#">Case File</a>	SDrive	Case	✓	
<a href="#">Edit</a>	<a href="#">Contact File</a>	SDrive	Contact	✓	
<a href="#">Edit</a>	<a href="#">Opportunity File</a>	SDrive	Opportunity	✓	
<a href="#">Edit</a>	<a href="#">S3Config</a>	SDrive		✓	This is holding the S3 configuration parameters
<a href="#">Edit</a>	<a href="#">S3Object</a>	SDrive		✓	This represents an Amazon S3 Object

Figure 6

- 2- Click **"Edit"** link next to the S3Object. Scroll to the **"Optional Features"** section in the opening page. Select **"Available for Customer Portal"** checkbox and click **"Save"** button (Figure 7).



**Context-Sensitive Help Setting**

- ☒ Open the standard Salesforce.com Help & Training window
- ☐ Open a window using a custom s-control
- ☐ Open a window using a Visualforce page

**Content Name**

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name field is always called "Name" when referenced via the API.

**Record Name**  **Example: Account Name**

**Data Type**

**Display Format**  **Example: A-{0000} What Is This?**

**Optional Features**

- ☒ Allow Reports
- ☐ Allow Activities
- ☒ Available for Customer Portal
- ☐ Track Field History

Figure 7

- 3- Click **"Edit"** link next to the Case File. Scroll to the **"Optional Features"** section in the opening page. Select **"Available for Customer Portal"** checkbox and click **"Save"** button.

Go to your Customer Portal Profile and edit custom object permissions for **S3Objects** and **Case Files** custom objects (Figure 8).

Custom Object Permissions														
	Basic Access				Data Administration			Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All	
Case Files	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		S3Objects	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>														

Figure 8

Case File custom object permissions are used for Case Files. You can also use other standard/custom objects inside Customer Portal using above same method described for Case Files. If you enable all access levels (Read, Create, Edit, Delete) your customers can create, edit, delete case files created using "Cases" tab in your customer portal. You can decide which access levels to use based on your needs. See "S-Drive Installation Guide" and "S-Drive User Guide" for more information about Case Files and other standard/custom object files usage in Customer Portal.

S3Objects custom object is used for keeping file information. We'll learn more about its configuration in "Editing Customer Portal Profiles" section. But for now set only "Read" access for S3Objects access level.



### Notes

1. If you are getting "**bad field names on insert/update call**" error inside Customer Portal while uploading a file for a standard/custom object, check **Security Controls -> Field Accessibility** over setup menu for that profile. From that menu make "**Hidden**" fields "**Visible**". This will solve the "**bad field names on insert/update call**" error and make the required fields accessible within customer portal.
2. You can hide individual standard/custom object S-Drive attachments from customer portal users by setting a component property in the attachment component of the custom page. See S-Drive Installation Guide – Creating Custom Object File Pages section for more information.
3. "**Attach from S-Drive Folders**" button is not visible for Customer Portal users.

## D. Editing Customer Portal Profiles

Based on the profile of the customer portal user, users can have different permissions in S-Drive. For example, if you just enable "read" feature, customer portal users will just be able to download uploaded files by internal users. They won't be able to upload a file, delete a file, email a file, create a folder or edit an item's description.

To set these permissions go to the "**Assigned Profiles**" section of the "**Customer Portal Configuration**" screen. Click on the name of the profile you want to edit (Figure 9).

Assigned Profiles		<input type="button" value="Edit Profiles"/>	<a href="#">Assigned Profiles Help</a>
Profile	Users		
Portal Manager Clone	3		

Figure 9

In the new window click Edit button to edit the user permissions (Figure 10).

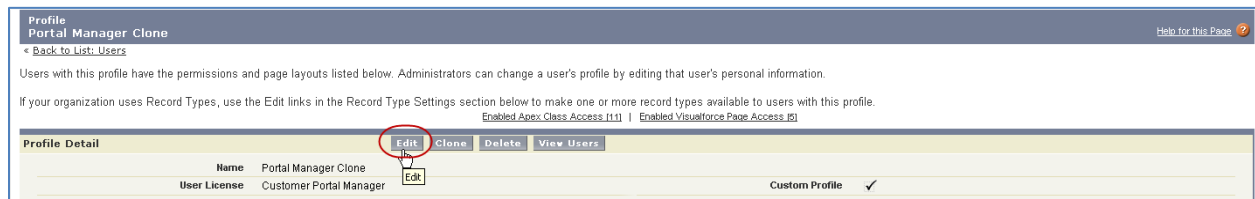


Figure 10

Scroll down to the “**Custom Object Permissions**” section. You’ll see the “**Basic Access**” selections for “**S3Objects**” custom object. You will need to check/uncheck these boxes based on your needs (Figure 11). 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 customer portal 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.



Figure 11

You can set access levels for customers using customer portal. *We strongly suggest you to just set the “Read” access to the customer portal users for data security.*

### 1. Example 1: Just Read Permission Enabled

If you just set “Read” and unset other permissions for S3Objects (Figure 11), your customer portal 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 Customer Portal users and for each file "Download" and "Copy URL" item menu actions will be visible. "Item Actions" menu will be hidden for folders (Figure 12).

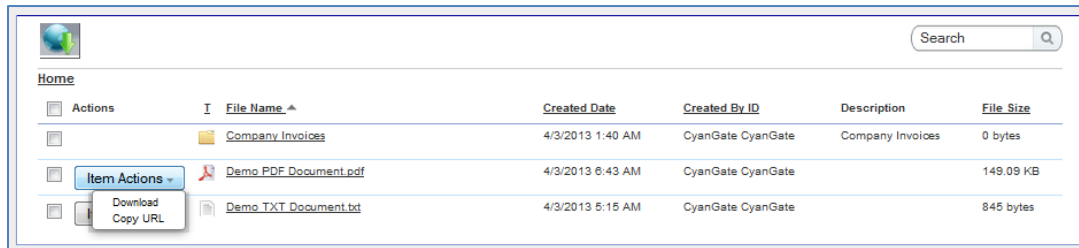


Figure 12

## 2. Example 2: Read, Create and Edit Permissions Enabled

If you set Read, Create, Edit permissions and unset Delete permission for S3Objects (Figure 13), your customer portal users won't be able to:

- delete files/folders
- cut/copy files.



Figure 13

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 Customer Portal 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 14). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.

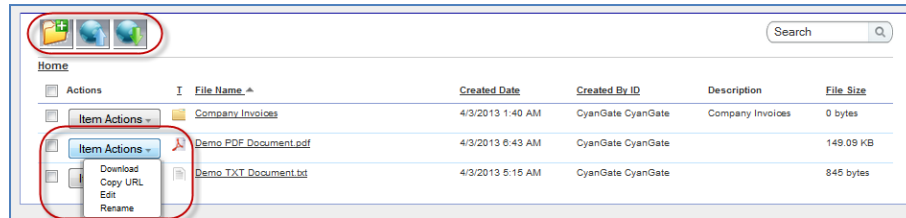


Figure 14

### 3. Example 3: Read, Create, Edit and Delete Permissions Enabled

If you set Read, Create, Edit, Delete permissions for S3Objects (Figure 15), your customer portal users will be able to:

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All <i>i</i>	Modify All <i>i</i>
S3Objects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Figure 15

- 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 Customer Portal 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 16). Also note that visibility of the buttons and menu items are affected via sharing and S-Drive Configuration.

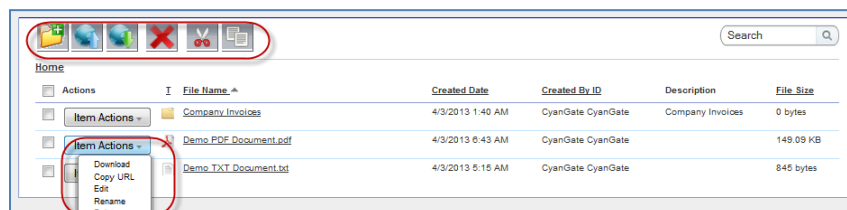


Figure 16

#### 4. **Permission Combinations That Are Not Supported for S3Objects**

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

## E. 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](https://sdriveapp.com/support)
2. Email: [sdrive@sdriveapp.com](mailto:sdrive@sdriveapp.com)

You can find up-to-date product information, documents, tutorial videos, tools in our web page:  
[www.sdriveapp.com](https://www.sdriveapp.com)