



S-Drive

Customer Portal Guide

v1.23

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.



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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):

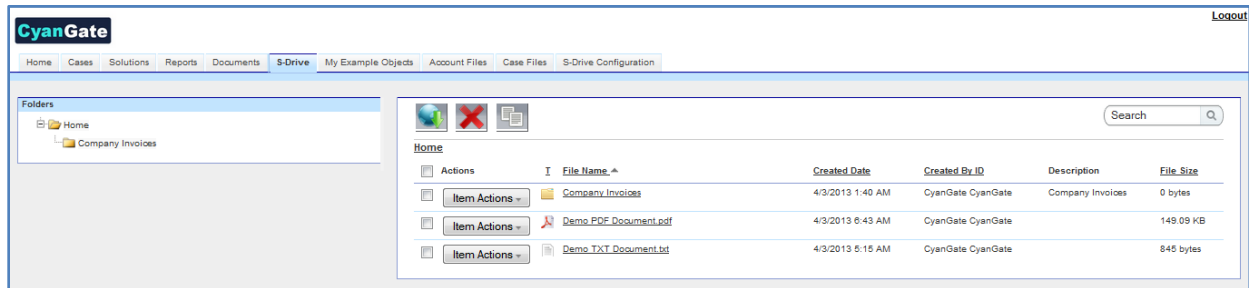


Figure 1

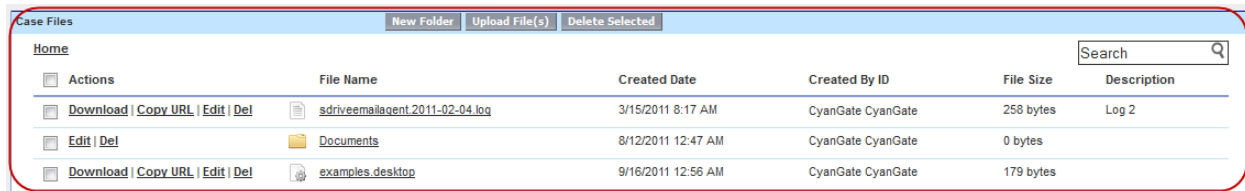


Figure 2

Note: Customer Portal is currently enabled for Enterprise and Unlimited versions of Salesforce.com.

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).

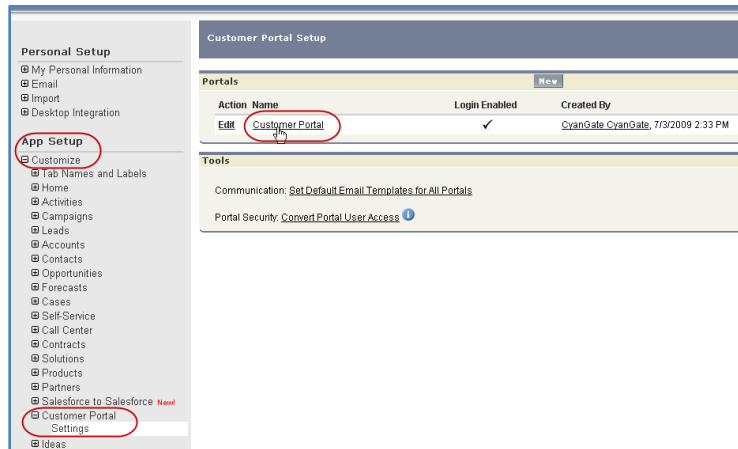


Figure 3

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)

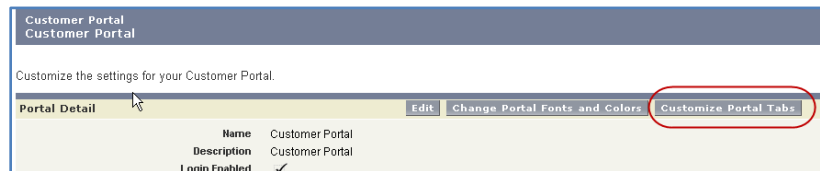


Figure 4

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”**.

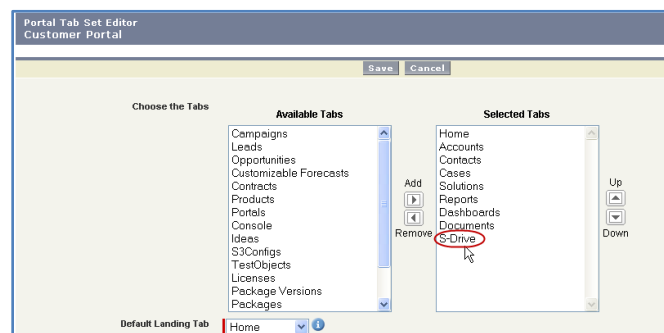


Figure 5

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
Edit	Account File	SDrive	Account	✓	
Edit	Case File	SDrive	Case	✓	
Edit	Contact File	SDrive	Contact	✓	
Edit	Opportunity File	SDrive	Opportunity	✓	
Edit	S3Config	SDrive		✓	This is holding the S3 configuration parameters
Edit	S3Object	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).

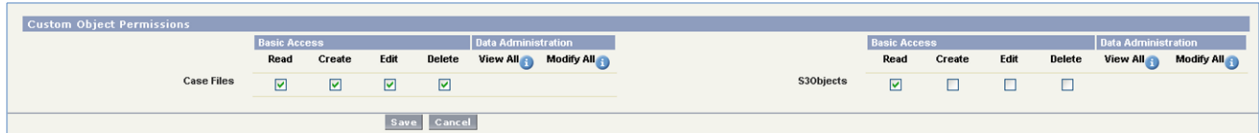


Figure 8

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).

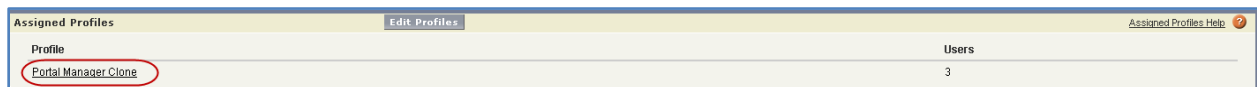


Figure 9

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

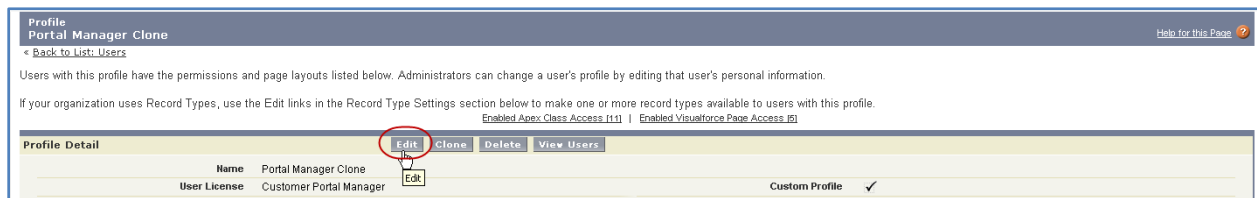


Figure 10

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).

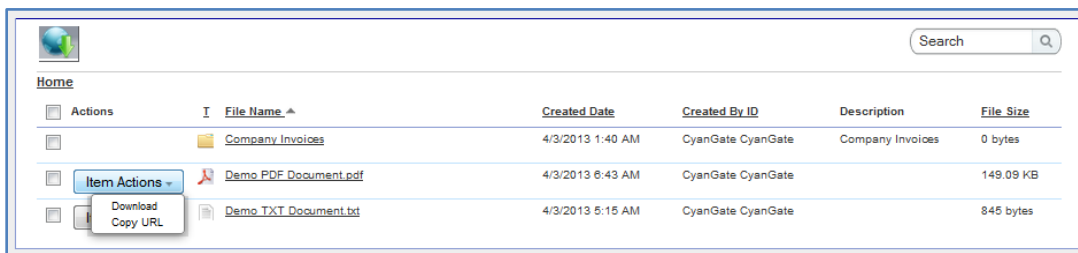


Figure 12

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.

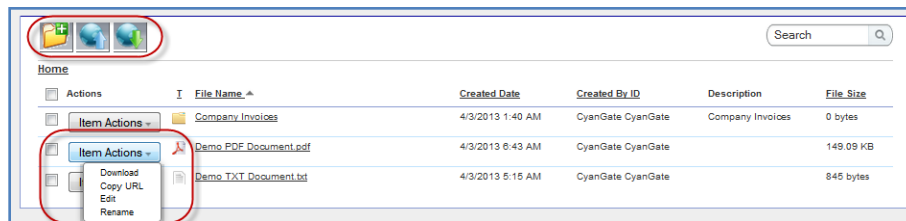


Figure 14

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:



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.

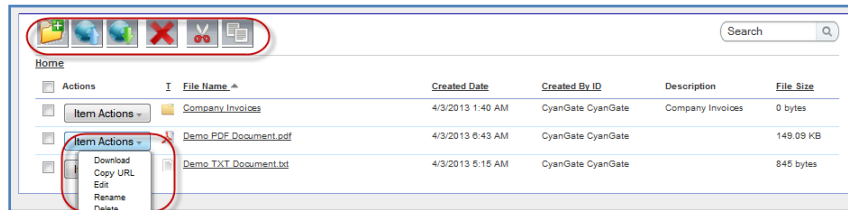


Figure 16

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: <http://sdrive.cyangate.com/support/>
2. Email: sdrive@cyangate.com

You can find up-to-date product information, documents, tutorial videos, tools in our web page: <http://www.cyangate.com/products/s-drive-for-salesforce-com/>