S-Drive Customer Portal Guide

v1.11

Important Note

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

CyanGate

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A. S-Drive Customer Portal Screen

Customer Portal users can access S-Drive screen if the Salesforce.com account’s system administrator enables S-Drive tab to the Customer Portal users (Figure 1):

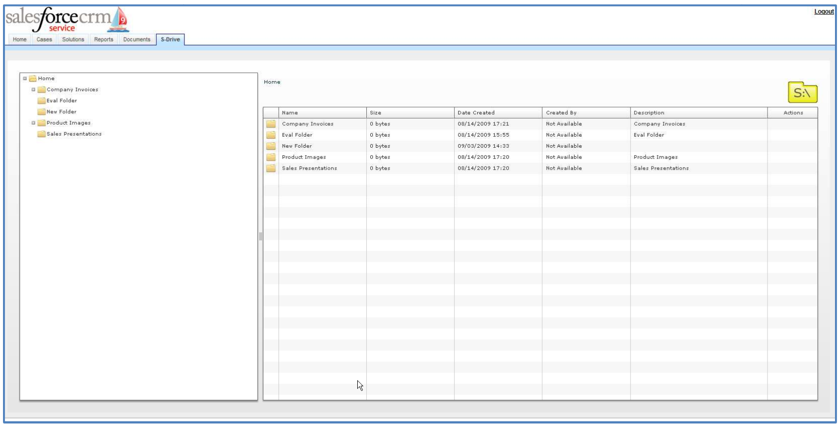


Figure 1

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 2).

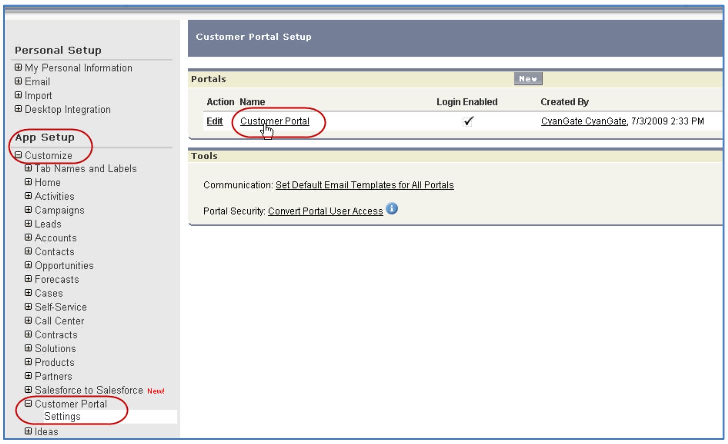


Figure 2

In the new page you can see the details of the portal. Click "**Customize Portal Tabs**" button at top right of the "**Portal Detail**" section. (Figure 3)

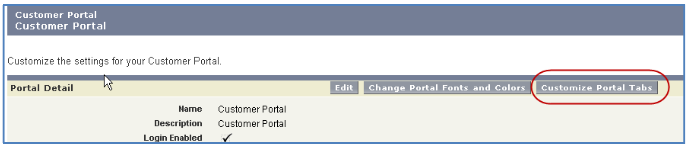


Figure 3

After clicking the button, you'll see the "**Portal Tab Set Editor**" screen (Figure **4**). Select S-Drive from "**Available Tabs**" and click "**Add**" button to add it to the "**Selected Tabs**". Click "**Save**".

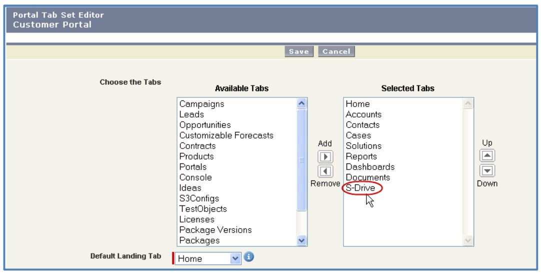


Figure 4

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**. These are the custom objects that you must edit to use your S-Drive tab in your Customer Portal: **S3Config, S3Object**. Also if you want to use **Case File**s or other custom objects for your customer portal you need to enable for them also (Figure 5).

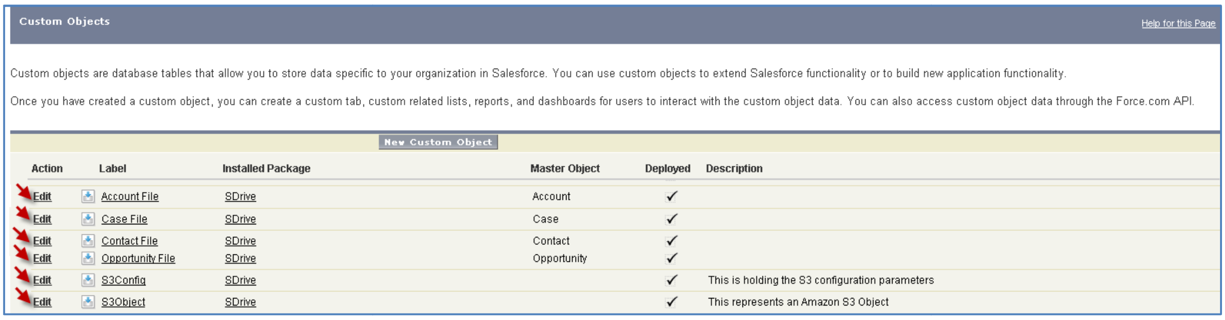


Figure 5

2- Click "**Edit**" link next to the S3Config. Scroll to the "**Optional Features**" section in the opening page. Select "**Available for Customer Portal**" checkbox and click "**Save**" button (Figure 6).

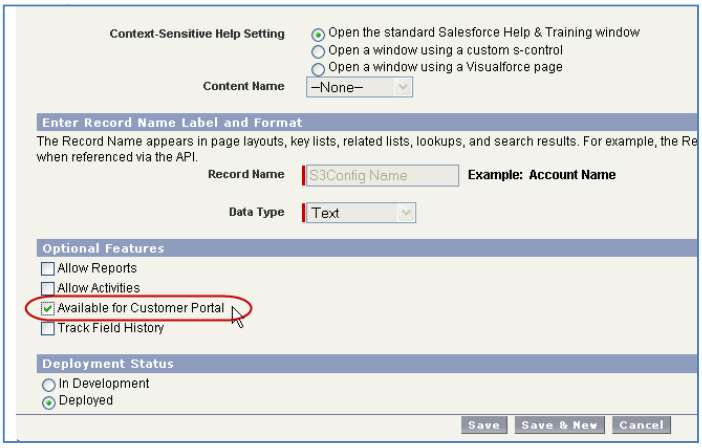


Figure 6

3- 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.

4- 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 **S3Configs**, **S3Objects** and **Case Files** custom objects (Figure 7). See "

5- Editing Customer Portal Profiles" section to learn how to access this settings.

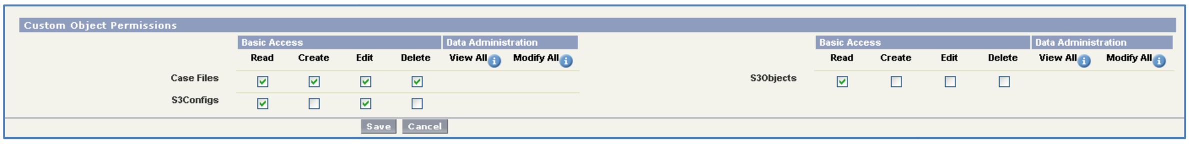


Figure 7

Case File custom object permissions is 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.

S3Configs custom object is used for retrieving S-Drive specific configuration settings. **Set "Read" and "Edit" access for S3Configs** acccess level.

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.

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 8).

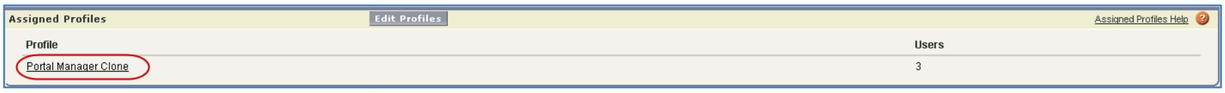


Figure 8

In the new window click Edit button to edit the user permissions (Figure 9).

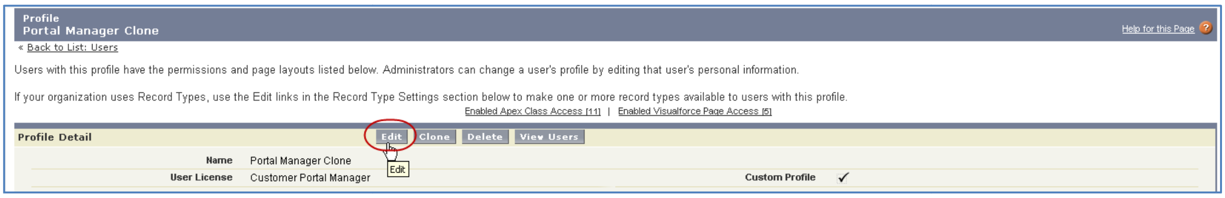


Figure 9

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 10). 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, Delete**. We’ll see examples of these access level combinations in the sub sections.

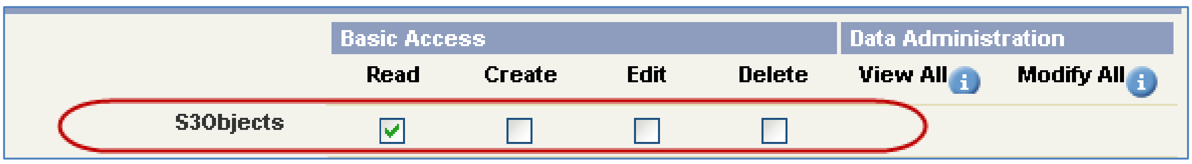


Figure 10

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 10), 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
- email files [Email feature is not supported in Customer Portal by Salesforce.com].

They will be able to:

- browse folders
- download files
- copy the URL of the file to the clipboard.

In the S-Drive screen, none of the toolbar buttons will be displayed for Customer Portal users and for each file “Download File” and “Copy URL to Clipboard” buttons will be visible (Figure 11).

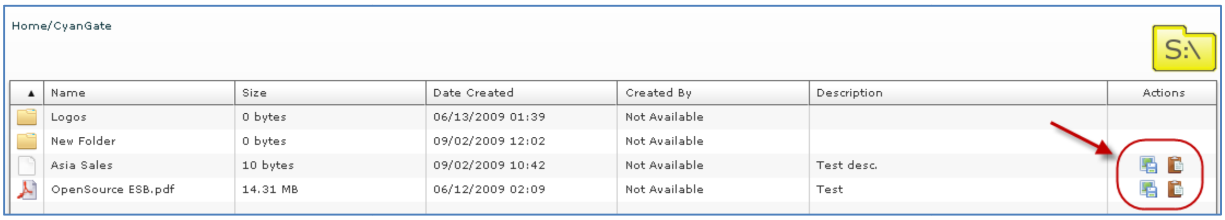


Figure 11

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

If you set Read, Create, Edit permissions and unset Delete permission for S3Objects (Figure 12), your customer portal users won’t be able to:

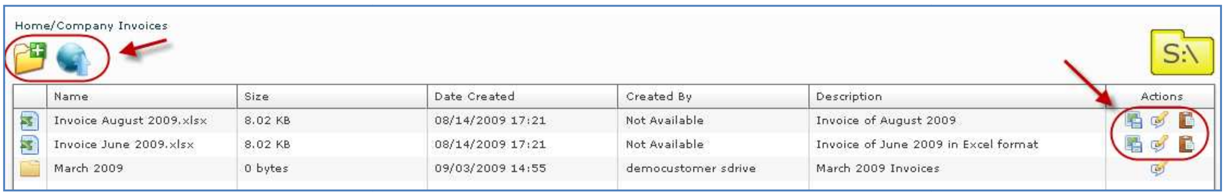
- delete files/folders
- cut/copy files
- email files [Email feature is not supported in Customer Portal by Salesforce.com].

Figure 12

They will be able to:

- upload files
- create folders
- browse folders
- download files
- rename files/folders
- edit descriptions of files/folders
- copy the URL of the file to the clipboard.

In the S-Drive screen, New Folder and Upload File(s) buttons will be displayed for Customer Portal users and for each file “Download File”, “Edit Description” and “Copy URL to Clipboard” buttons will be visible. Also users can rename their files/folders by right clicking them and selecting “Rename” from the list. (Figure 13).



Name	Size	Date Created	Created By	Description	Actions
Invoice August 2009.xlsx	8.02 KB	08/14/2009 17:21	Not Available	Invoice of August 2009	
Invoice June 2009.xlsx	8.02 KB	08/14/2009 17:21	Not Available	Invoice of June 2009 in Excel format	
March 2009	0 bytes	09/03/2009 14:55	democustomer sdrive	March 2009 Invoices	

Figure 13

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

If you set Read, Create, Edit, Delete permissions for S3Objects (Figure 14), your customer portal users will be able to:

Figure 14

- upload files
- create folders
- browse folders
- download files
- delete files/folders
- edit descriptions of files/folders
- cut/copy files
- rename files/folders
- copy the URL of the file to the clipboard.

They won’t be able to:

- email files [Email feature is not supported in Customer Portal by Salesforce.com].

In the S-Drive screen, New Folder, Upload File(s) and Delete File(s) buttons will be displayed for Customer Portal users and for each file “Download File”, “Edit Description”, “Copy URL to Clipboard” and “Delete File/Folder” buttons will be visible. Also users can rename their files/folders by right clicking them and selecting “Rename” from the list, cut/copy/paste by right clicking them and selecting “Cut”, “Copy”, “Paste” from the list. (Figure 15).

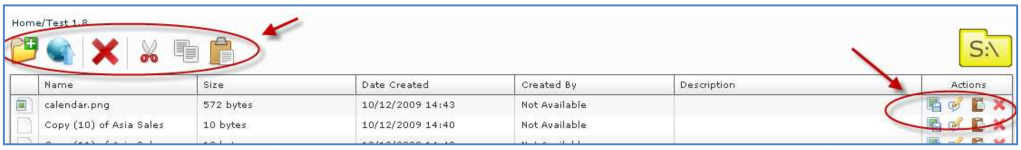


Figure 15

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 with S-Drive Support Team for any issues and questions regarding the use and administration of S-Drive that you cannot solve using "S-Drive Installation Guide","S-Drive User Guide" and “S-Drive Customer Portal Guide”. These guides can be downloaded from the AppExchange listing page for S-Drive (http://sdrive.cyangate.com).

You can send your questions using these ways:

1. Open a Ticket at Support Site: http://sdrive.cyangate.com/support/
2. Email: sdrive@cyangate.com