

Share Me

User Guide



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Installation

Make sure to choose **Install for Admins Only** and click **Install**.

**Install Share Me**
By


☒ **Install for Admins Only**


☐ **Install for All Users**


☐ **Install for Specific Profiles...**

Configuration

Follow below steps to configure *Share Me* app after package installation.

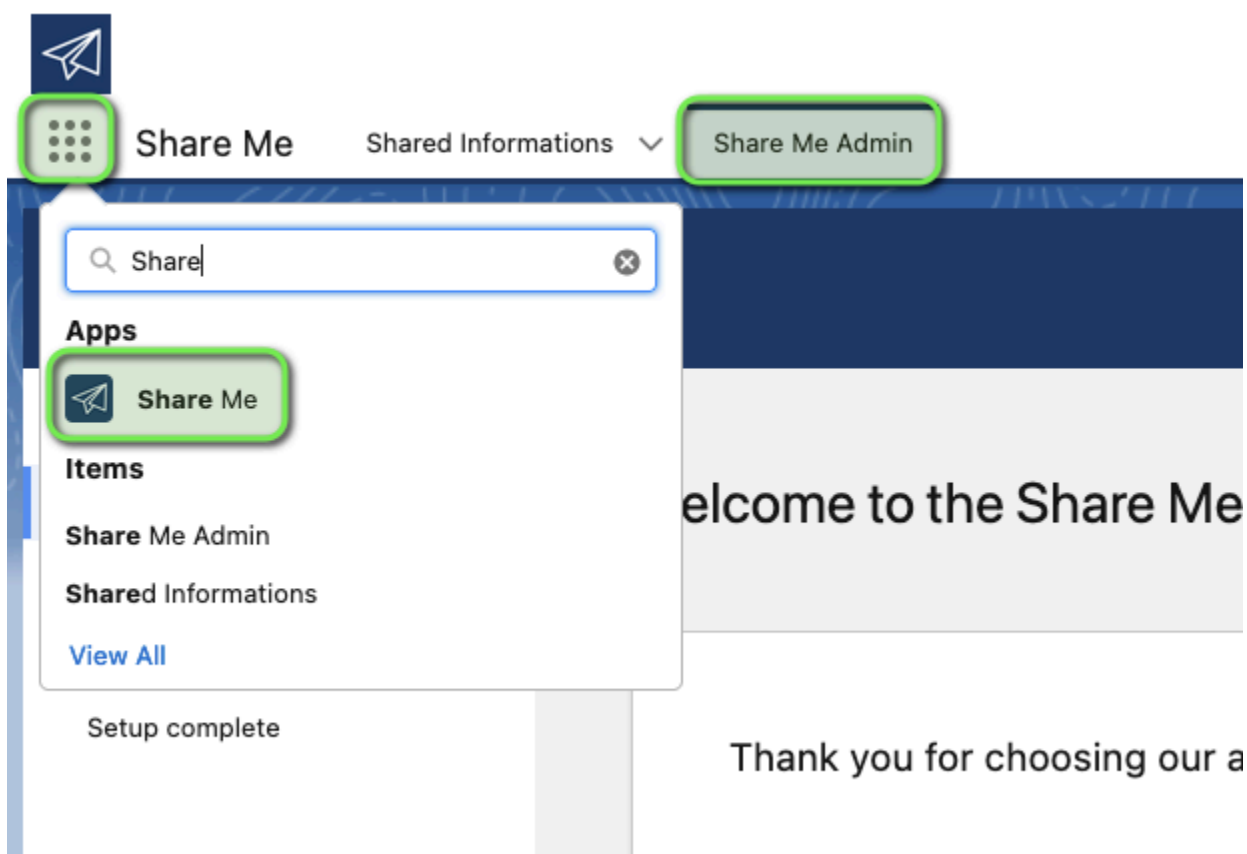
1. Ensure that your user has a **Share Me Admin** Permission Set assigned.

Permission Set Assignments		Edit Assignments
Action	Permission Set Label	
Del	Share Me Admin	

2. Assign **Share Me Standard** Permission Set to any user who will be using the application.

Permission Set Assignments		Edit Assignments
Action	Permission Set Label	
Del	Share Me Standard	

3. Open **Share Me** App and go to **Share Me Admin** Tab.



4. Proceed with [Installation Wizard](#).
5. [Set component](#).

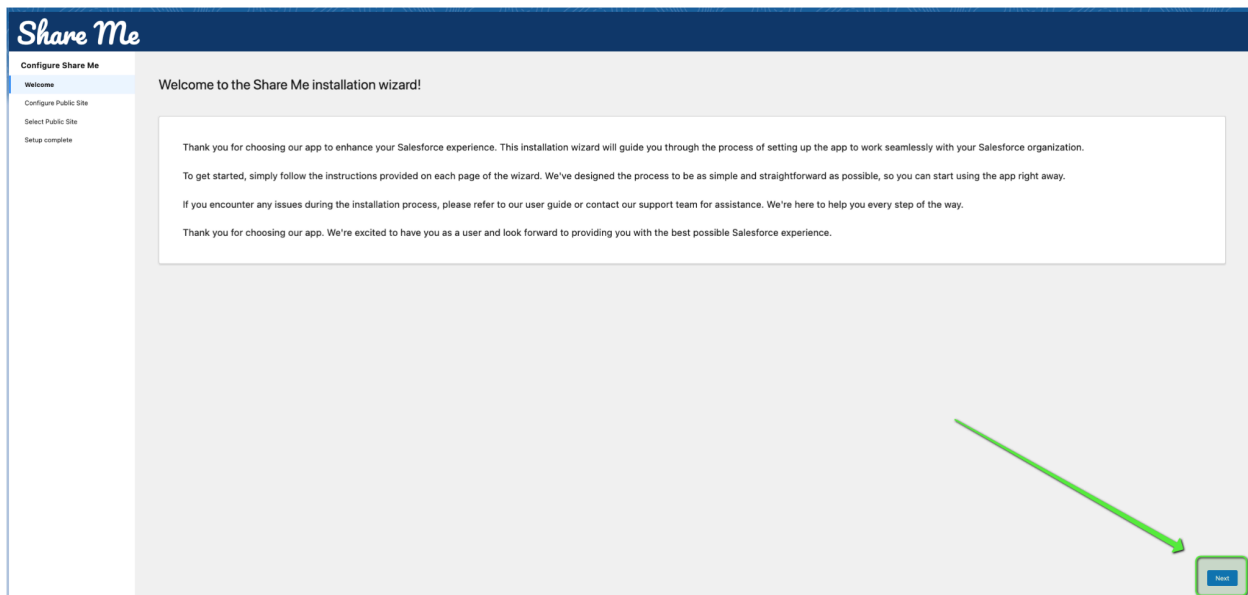


Installation Wizard

Following instructions explain the installation wizard process.

Welcome Screen

Click **Next** on Welcome Screen.



Configure Public Site

A Public Site is required to allow public access to information you would like to share.



1. Go to **Setup > Sites**

The screenshot shows the Salesforce Setup interface. At the top, the 'Setup' gear icon is highlighted with a green box. Below it, a dropdown menu shows 'Setup' and 'Developer Console', with 'Setup' also highlighted. The main navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'site'. The left sidebar lists categories: 'Feature Settings', 'User Interface', and 'Security'. Under 'User Interface', 'Sites and Domains' is expanded, showing 'Custom URLs', 'Domains', and 'Sites'. The 'Sites' item is highlighted with a green box. The right sidebar shows a 'Sites' section with a 'What is a Site?' card and a 'Your Salesforce' card.



2. Click **New** button

Sites

What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring us registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation is automatic.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for its customers and another for its prospects.

Your Salesforce site domain name is **power-customer-4683-dev-ed.scratch.my.salesforce-sites.com**

[Salesforce Sites Terms and Conditions](#)

Settings

These settings affect all Salesforce sites.

☐ Allow using standard external profiles for self-registration, user creation, and login

SaveCancel

Sites (power-customer-4683-dev-ed.scratch.my.salesforce-sites.com)

New

Action	Site Label ↑	Site URL
--------	--------------	----------

3. Fill fields as described below:
 1. Site Label: (Any Allowed Name)
 2. Site Name: (AnyAllowedName)
 3. Default Web Address: shareme (But can be any other available name)
 4. Active: Selected
 5. Active Site Home Page: Search and select ShareMePage



- Click the **Save** button.

Site Edit

New Site Save Cancel

Site Label [i](#)

Site Name [i](#)

Site type

Site Description

Site Contact [i](#)

Default Record Owner [i](#)

Default Web Address [i](#)

Active ☒ [i](#)

Active Site Home Page [i](#)

Inactive Site Home Page [i](#) [\[Preview\]](#)

Site Template [i](#)

Site Robots.txt [i](#)

Site Favorite Icon [i](#)

Analytics Tracking Code [i](#)

URL Rewriter Class [i](#)

Enable Feeds ☐

Clickjack Protection Level [i](#)

Lightning Features for Guest Users ☒ [i](#)

Enable Content Sniffing Protection ☒ [i](#)

Enable Browser Cross Site Scripting Protection ☒ [i](#)

Referrer URL Protection ☒ [i](#)

Allow only required cookies for this site ☐ [i](#) [More Details](#)

Redirect to custom domain ☒ [i](#)

Cache public Visualforce pages ☒ [i](#) [\[More Info\]](#)

Guest Access to the Payments API ☐ [i](#)

Guest Access to the Support API ☐ [i](#)

Save Cancel

- In newly created Site Details:



1. Click **Edit** button in Site Visualforce Pages section

 **SETUP**
Sites

Site Details

Share Me

[« Back to List: Sites](#)

Site Detail

Edit

Public Access Settings

Site Label	Share Me
Site Type	Guest User License
Site Contact	User User
Login	Not Allowed
Site Favorite Icon	
Site Robots.txt	
Enable Feeds	☐
URL Rewriter Class	
Lightning Features for Guest Users	☒ i
Enable Browser Cross Site Scripting Protection	☒ i
Allow only required cookies for this site	☐ i More Details
Guest Access to the Support API	☐ i
Redirect to custom domain	☒ i

Last Modified By [User User](#), 15.03.2023 23:03

Edit

Public Access Settings

Custom URLs

Action	Domain Name
Edit Del View Preview as Admin	power-customer-4683-dev-ed.scratch.my.salesforce-sites.com

Trusted Domains for Inline Frames

Add Domain

No records to display

Site Visualforce Pages

Edit

Visualforce Page Name
shareme.BandwidthExceeded
shareme.Exception
shareme.FileNotFound
shareme.ForgotPassword
shareme.ForgotPasswordConfirm
shareme.InMaintenance
shareme.ShareMePage
shareme.ShareMePageStyling
shareme.SiteLogin
shareme.SiteRegister
shareme.SiteRegisterConfirm
shareme.SiteTemplate



- Move **shareme.ShareMePageStyling** from Available Visualforce Pages to Enabled Visualforce Pages
- Click the **Save** button.

Enable Visualforce Page Access

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

Available Visualforce Pages

- shareme.AnswersHome
- shareme.ChangePassword
- shareme.IdeasHome
- shareme.MyProfilePage
- shareme.StdExceptionTemplate
- shareme.UnderConstruction

Enabled Visualforce Pages

- shareme.BandwidthExceeded
- shareme.Exception
- shareme.FileNotFound
- shareme.ForgotPassword
- shareme.ForgotPasswordConfirm
- shareme.InMaintenance
- shareme.ShareMePage**
- shareme.ShareMePageStyling**
- shareme.SiteLogin
- shareme.SiteRegister
- shareme.SiteRegisterConfirm
- shareme.SiteTemplate
- shareme.Unauthorized

Add

Remove

Save

Cancel

2. Click **Public Access Settings** button

SETUP

Sites

Site Details

Share Me

[« Back to List: Sites](#)

Site Detail

Site Label

Share Me

Site Type

Guest User License

Site Contact

[User User](#)

Login

Not Allowed

Site Favorite Icon

Site Robots.txt

Enable Feeds

☐

URL Rewriter Class

Lightning Features for Guest Users

☒ [i](#)

Enable Browser Cross Site Scripting Protection

☒ [i](#)

Edit

Public Access Settings

Login Settings

URL Redirects

Deactivate



- Click the **Edit** button in Enabled Apex Class Access section

Profile

Share Me Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal

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

[Login IP Ranges \[0\]](#)[Enabled Apex Class Access \[0\]](#)[Enabled Visualforce Page Access \[13\]](#)

Enabled Apex Class Access

[Edit](#)

No Apex Classes enabled

[User License](#)[Guest User License](#)[Record Types](#)

- Move **shareme.ShareMeExternalCtrl** from Available Apex Classes to Enabled Apex Classes

Enable Apex Class Access

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

[Save](#)[Cancel](#)

Available Apex Classes

shareme.ChangePasswordController
shareme.CustomNotificationSvc
shareme.EncryptionDetails
shareme.ForgotPasswordController
shareme.Mb
shareme.MbAccessLevel
shareme.MbCombobox
shareme.MbDml
shareme.MbDomain
shareme.MbDomainBuilder
shareme.MbEnum
shareme.MbEnv
shareme.MbException
shareme.MbField

Add



Remove

Enabled Apex Classes

shareme.ShareMeExternalCtrl

- Click the **Save** button.



5. After performing the above steps, check below confirmation and go to the next step.

The screenshot shows the 'Configure Public Site' step in the Share Me setup process. The left sidebar contains the 'Configure Share Me' menu with options: 'Welcome', 'Configure Public Site' (selected), 'Select Public Site', and 'Setup complete'. The main content area is titled 'Configure Public Site' and contains a list of instructions for configuring the public site. A green box highlights the 'I have configured Public Site' checkbox, which is checked. A green arrow points to this checkbox. Another green arrow points to the 'Save and Next' button at the bottom right. The 'Discard and Previous' button is at the bottom left.

Share Me

Configure Share Me

Welcome

Configure Public Site

Select Public Site

Setup complete

Configure Public Site

In this step you will need to configure Public Site in Salesforce to allow public links to work from external users. To configure app please follow below instructions.

1. Go to [Sites in Setup](#).
2. Click New button
3. Fill fields as described below:
 - Site Label: (Any Allowed Name)
 - Site Name: (AnyAllowedName)
 - Default Web Address: shareme (But can be any other available name)
 - Active: Selected
 - Active Site Home Page: Search and select ShareMePage
 - Click Save button.
4. In Site Details:
 1. Click Edit button in Site Visualforce Pages section
 - Move shareme.ShareMePage from Available Visualforce Pages to Enabled Visualforce Pages
 - Move shareme.ShareMePageStyling from Available Visualforce Pages to Enabled Visualforce Pages
 - Click Save button.
 2. Click Public Access Settings button
 - Click Edit button in Enabled Apex Class Access section
 - Move shareme.ShareMeExternalCtrl from Available Apex Classes to Enabled Apex Classes
 - Click Save button.

After performing above steps, check below confirmation and go to the next step.

☒ I have configured Public Site

Discard and Previous

Save and Next

Select Public Site

In this step select a newly created public site and go to the next page.

The screenshot shows the 'Select Public Site' step in the Share Me setup process. The left sidebar contains the 'Configure Share Me' menu with options: 'Welcome', 'Configure Public Site', 'Select Public Site' (selected), and 'Setup complete'. The main content area is titled 'Select Public Site' and contains a text box with a dropdown menu. The dropdown menu shows 'Share Me' as the selected option. A green arrow points to this dropdown menu. Another green arrow points to the 'Save and Next' button at the bottom right. The 'Discard and Previous' button is at the bottom left.

Share Me

Configure Share Me

Welcome

Configure Public Site

Select Public Site

Setup complete

Select Public Site

In this step you need to select created in previous step public site. In help box you can check public's site API name.

Public Site

Share Me

Discard and Previous

Save and Next

INFO: In case of multiple sites with the same name, you can check the hint icon to see the API name.



In this step you need to select created in previous step public site. In help box you can check public's site API name.

Public Site

Share Me



Setup Completed

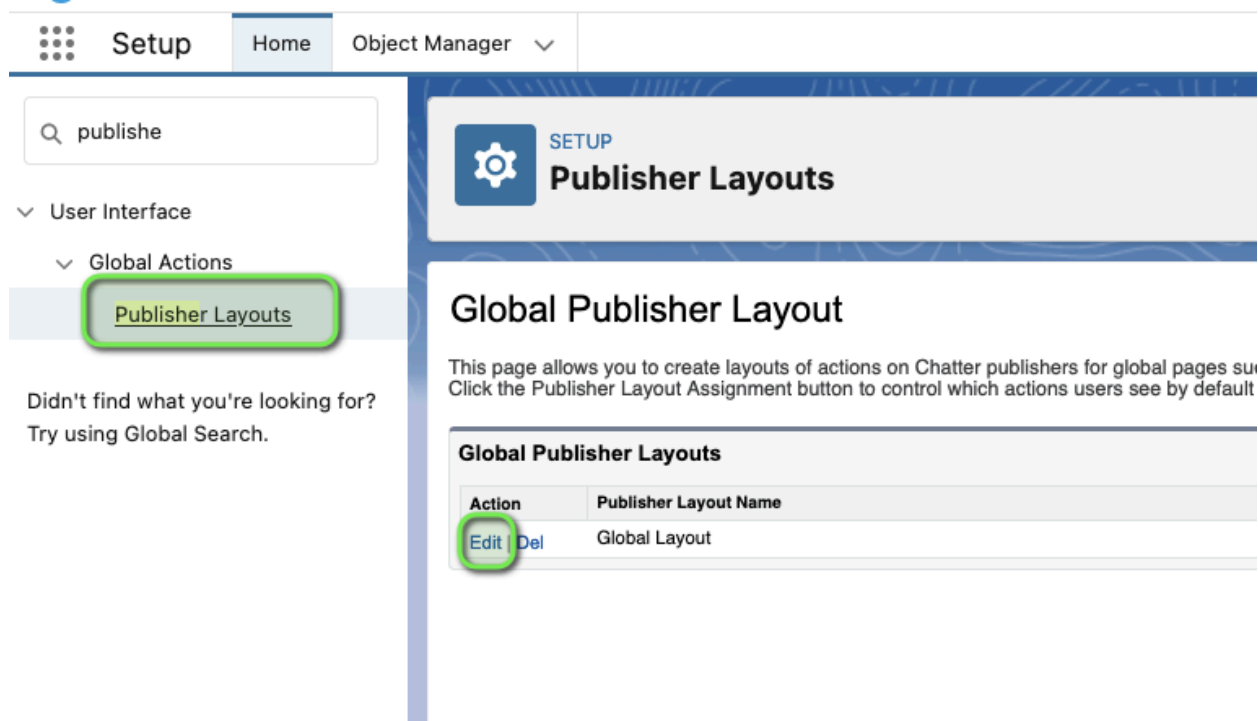
App is ready to use.

Set Components

Global Quick Action

To allow global quick action follow below steps:

1. Go to **Setup > Publisher Layout** and click **Edit** next to Global Layout



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "publishe" entered. Under "Global Actions", the "Publisher Layouts" link is highlighted with a green box. The main content area is titled "SETUP Publisher Layouts". Below this, the "Global Publisher Layout" section contains a table with one row: "Global Layout". The "Edit" link for this row is circled in green.

Action	Publisher Layout Name
Edit Del	Global Layout



2. Move **Share Me** action from palette to **Salesforce Mobile and Lightning Experience Actions**

SETUP Publisher Layouts

Global Layout ▾

Save Quick Save Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name ✕

Email	Mobile Smart Actions	New Document	New Note	Post
File	New Account	New Event	New Opportunity	Question
Link	New Case	New Group	New Task	Share Me
Log a Call	New Contact	New Lead	Poll	Thanks

Global Publisher

Quick Actions in the Salesforce Classic Publisher

Post File New Event New Task New Contact Log a Call New Opportunity New Case New Lead Thanks Lin

Salesforce Mobile and Lightning Experience Actions 1

Share Me Post File New Event New Task New Contact Log a Call New Opportunity New Case New Lead 1

3. Click the **Save** button.



To use it, go to any Lightning Record Page and click **+** button to use the **Share Me** component.

Shared Information	External URL	Is Expired	Expiration	Is One Time	Is Viewed
SI-00002	Go to Information	☐	31.03.2023, 22:34 CET	☐	☐
SI-00003	Go to Information	☒	20.03.2023, 22:29 CET	☐	☐
SI-00001	Go to Information	☒	16.03.2023, 22:29 CET	☐	☐
SI-00000	Go to Information	☒	16.03.2023, 22:28 CET	☐	☐

It will open component in box at the bottom:

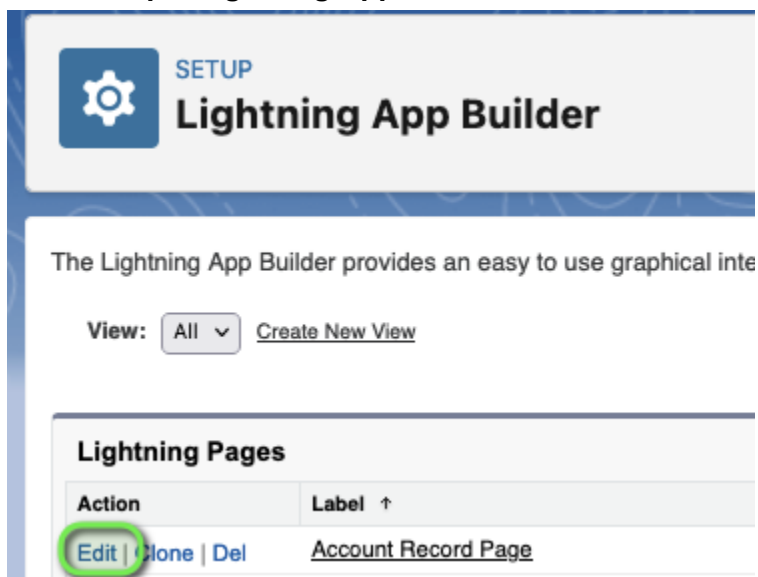
Shared Information	External URL	Is Expired
SI-00002	Go to Information	☐
SI-00003	Go to Information	☒
SI-00001	Go to Information	☒
SI-00000	Go to Information	☒



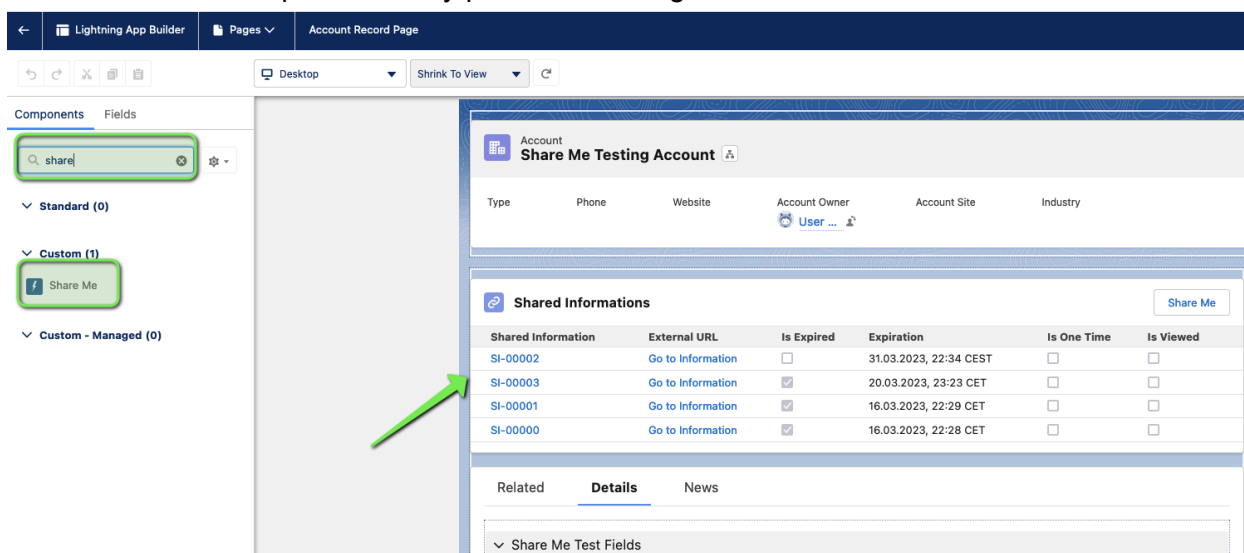
Lightning Component on Lightning Record Page

You can place a Share Me component on any Lightning Record Page. To do so follow below steps.

1. Go to **Setup > Lightning App Builder** and select **Edit** near the Lightning Record Page.



2. Place Share Me Component in any place on the Page.



3. Click the **Save** button.

Use Share Me Component

 Shared Informations Share Me					
Shared Information	External URL	Is Expired	Expiration	Is One Time	Is Viewed
SI-00002	Go to Information	☐	31.03.2023, 22:34 CEST	☐	☐
SI-00003	Go to Information	☒	20.03.2023, 23:23 CET	☐	☐
SI-00001	Go to Information	☒	16.03.2023, 22:29 CET	☐	☐
SI-00000	Go to Information	☒	16.03.2023, 22:28 CET	☐	☐

To create new Shared Information click the **Share Me** button.

It will open a modal where you can specify which fields should be shared, expiration date/time and if information can be viewed only one time.

Get a link to share

☐ Share All Fields

Select fields ⓘ

Available

1 Auto Number

10 Number

11 Percent

12 Phone

13 Picklist

14 Multi Picklist

Selected

Link expires after

1 day ▼

☐ Can be viewed only 1 time

Cancel

Get Link to Share

After selecting fields click **Get Link to Share**, to create shared information.



After that screen with a public url to the shared information appears. This url can be shared with external users to get access to shared information.

Get a link to share

https://[redacted].my.salesforce-sites.com/shar...
Copy Link

Done

After closing the modal, the Shared Information record will be visible on the Lightning Component list.

Shared Informations Share Me					
Shared Information	External URL	Is Expired	Expiration	Is One Time	Is Viewed
SI-00002	Go to Information	☐	31.03.2023, 22:34 CEST	☐	☐
SI-00004	Go to Information	☐	22.03.2023, 23:22 CET	☐	☐
SI-00003	Go to Information	☒	20.03.2023, 23:23 CET	☐	☐
SI-00001	Go to Information	☒	16.03.2023, 22:29 CET	☐	☐
SI-00000	Go to Information	☒	16.03.2023, 22:28 CET	☐	☐

Selecting Shared Information Number (SI-00004) will redirect to Shared Information Record. Selecting Go to Information will redirect to a shared information public link.

Shared Information

Shared Information is the custom object that holds all shared information.

Shared Information

SI-00004

[Go to record](#)
[Go to Information](#)

Is Expired

Created By

Owner

21.03.2023, 23:24

User User

User User

Details

Shared Information Number

SI-00004

External URL

[Go to Information](#)

Shared Record

[Go to record](#)

Information Status

Is Expired

Is Active

Expiration

Created By

Is One Time

Is Viewed

22.03.2023, 23:22

User User

Account Shared Fields

Label

API Name

1 Auto Number

17



In the details section it has a link to public link (**External URL**) and to record that was shared (**Shared Record**).

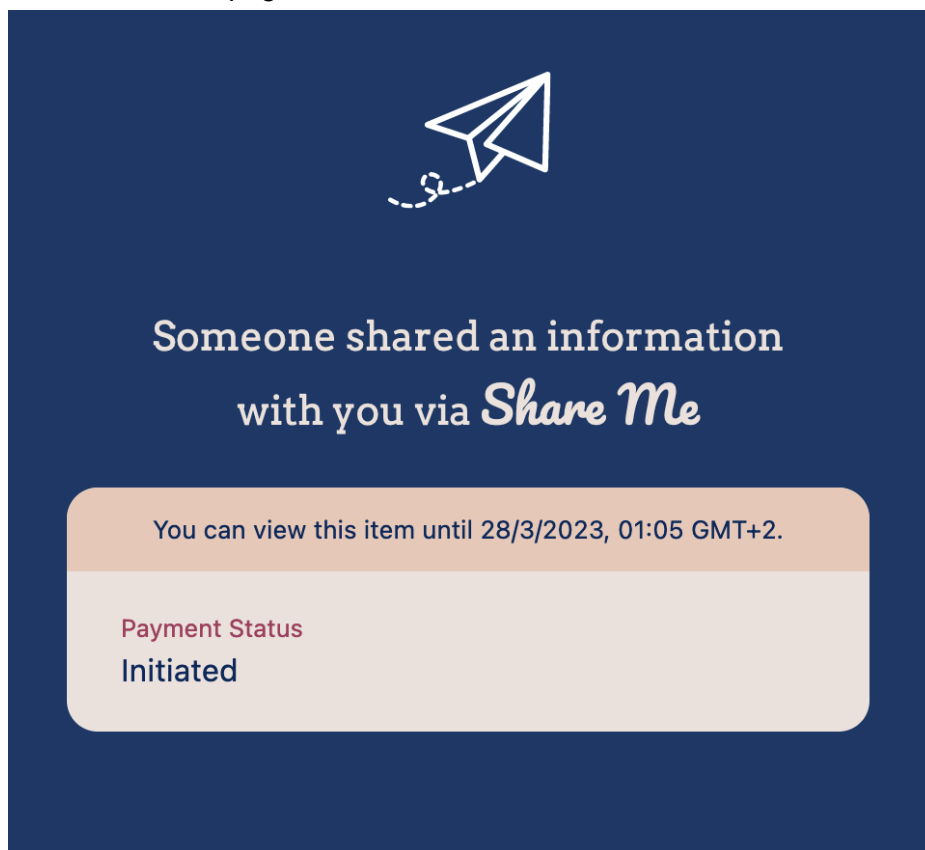
In the **Information Status** section, there are details regarding if Shared Information is expired. Fields meaning:

1. **Is Expired** - formula that indicates if Shared Information is expired or not.
2. **Is Active** - checkbox field, if set to false, Shared Information is expired.
3. **Is One Time** - indicates if Shared Information is available to be viewed only one time
4. **Is Viewed** - indicates if Shared Information was already viewed. If yes Shared Information is expired regardless of **Expiration** date value. (Applies only when Is One Time is selected)
5. **Expiration** - indicates time after which Shared Information is expired.

On the right there is the Account **Shared Fields** section. **Update Fields** field can be used to change shared fields.

External Link

External Link redirects to the page that contains shared information.





Limitations

Share Me App is subject to Salesforce Governor Limits.

It means that the maximum number of Public Site Page Views and other limitations applies.

Click [here](#) for more information.