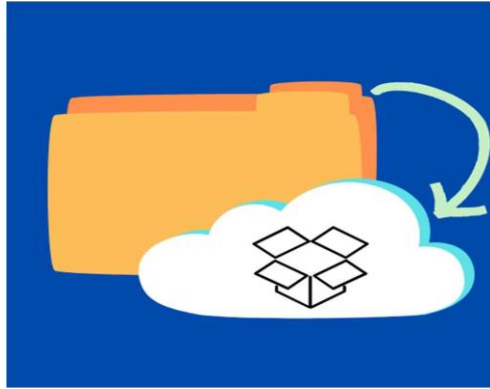




DROPBOX CONNECTOR

ADMIN GUIDE

Connecting Dropbox with Salesforce allows users to manage, upload, and access documents directly within Salesforce records. This integration streamlines file handling by storing documents in Dropbox while keeping them linked to Salesforce data, reducing storage limits and improving collaboration. Users can preview files, organize folders, and share documents securely without switching between platforms.

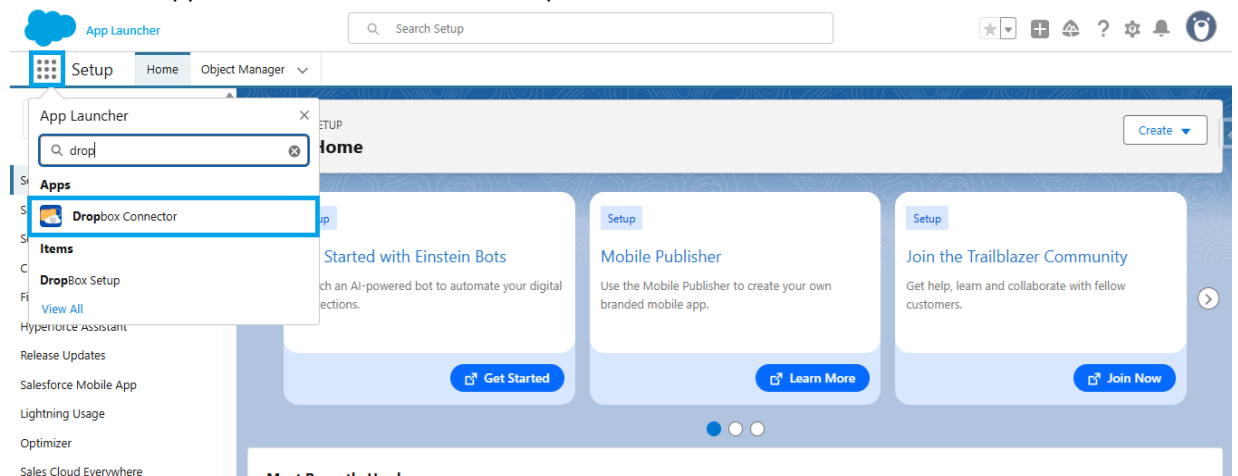
Pre-Installation Requirements for Dropbox Connector:

Before installing the Dropbox Connector, please verify the following preconditions:

- Your Production or Sandbox organization is licensed as Professional, Enterprise, Unlimited, Force.com, Developer, or Essentials.
- You have an active Dropbox account with the necessary permissions to connect and access files. Ensure appropriate access levels are granted for the required files and folders.
- Install the Dropbox Connector application from the Salesforce AppExchange into your Salesforce organization.

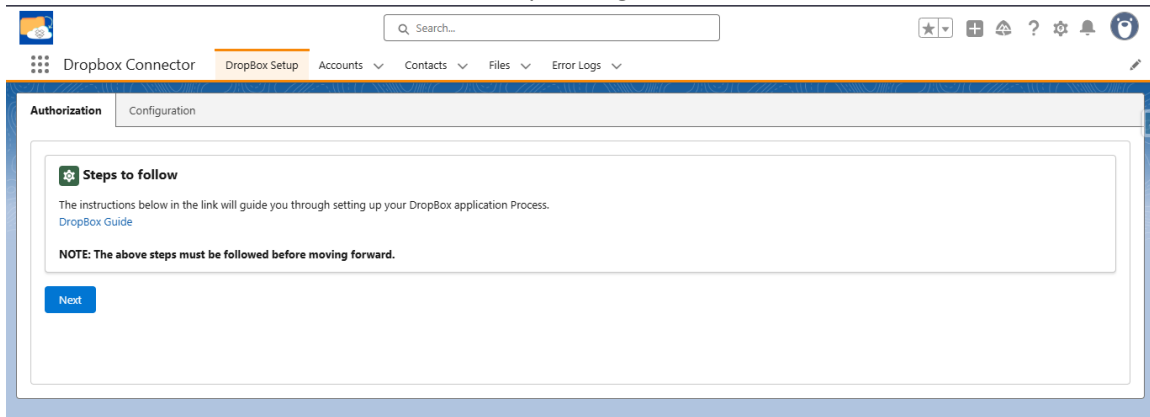
Configuration in the Dropbox Connector Console:

- Click on the App Launcher and search for Dropbox Connector.

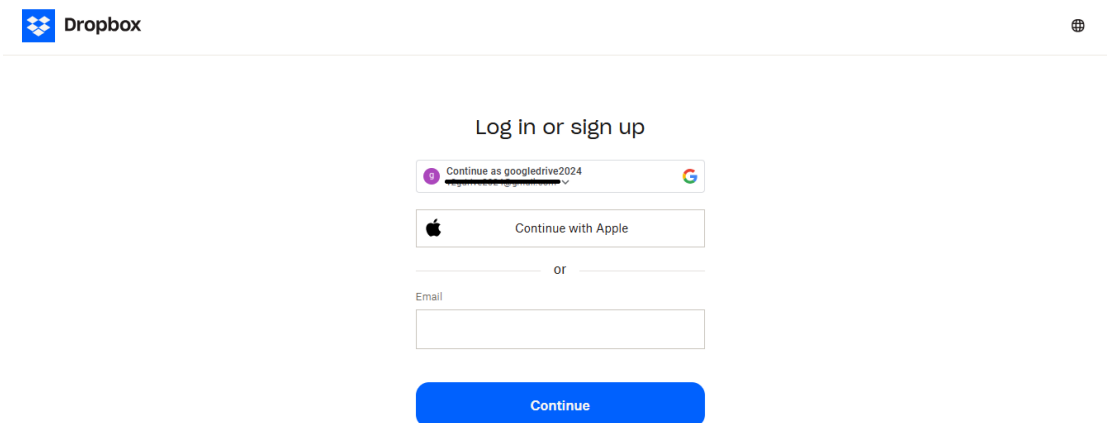


- On the Authorization tab, click on Dropbox Guide.

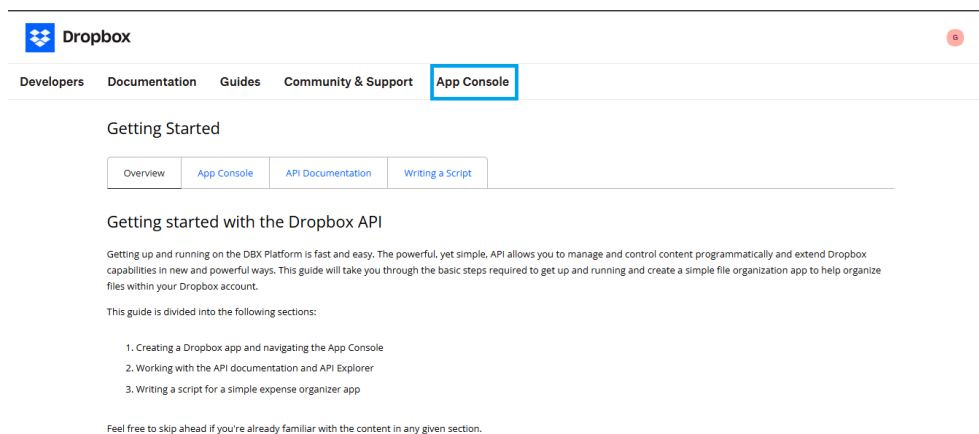
- The admin user will be redirected to the Dropbox login screen.



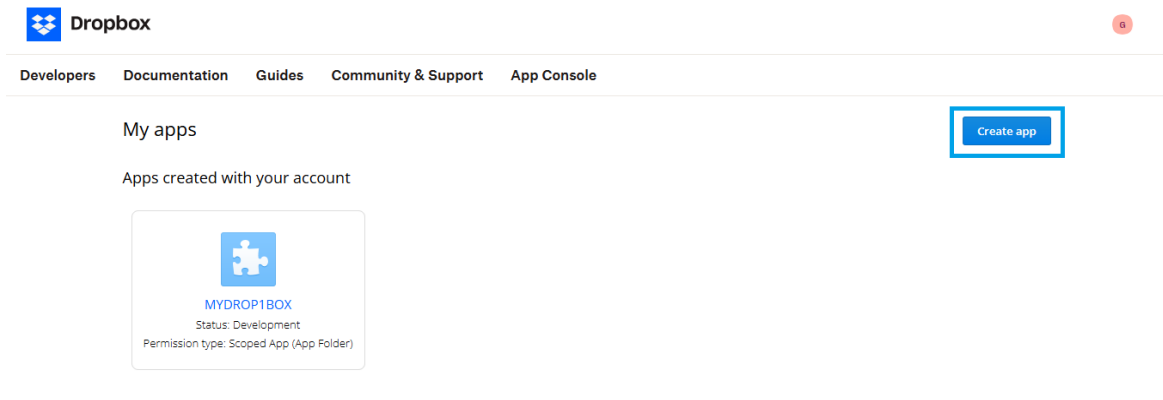
- Fill in your name, email address, and create a strong password. Then click “Continue.”
- Review the terms and conditions, then click “Agree and Sign up” to proceed.



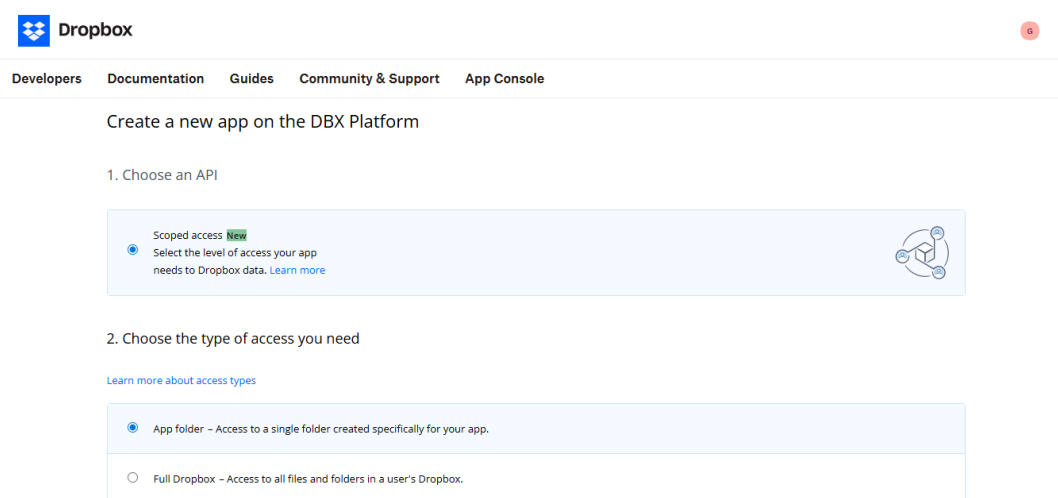
- Go to the App Console tab (highlighted in the screenshot) and click on it.



- Click on the Create app button (as shown in the screenshot).



- After clicking the Create app button, you'll be redirected to the "Create a new app" page.
- Under Choose an API, select Scoped access (New).
- Under Choose the type of access you need, select the App folder.



- Enter a name for your app in the **Name in your app** field, check the box to agree to the Dropbox API Terms and Conditions, and then click the **Create app** button.

Dropbox

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[Learn more about access types](#)

☒ App folder – Access to a single folder created specifically for your app.

☐ Full Dropbox – Access to all files and folders in a user's Dropbox.

3. Name your app

Dropbox

☒ I agree to [Dropbox API Terms and Conditions](#)

Create app

- Go to the Permissions tab (as highlighted in the screenshot).

Dropbox

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MYDROP1BOX

Settings **Permissions** Branding Analytics

Creating a Dropbox app

1 **Configure app settings**
Name your app and choose initial settings.

2 **Select access scopes**
Choose the access scopes, or specific permissions, that your app needs to interact with Dropbox. We recommend starting small and adding more permissions later if you need them. [Get started](#)

3 **Add branding**
Give your users important information about your Dropbox app. Should comply with the Dropbox developer branding guide. [Get started](#)

Status [Development](#) [Apply for production](#)

- In the Account Info section, check the box for **account_info.write**.
- In the Files and folders section, check the boxes for **files.metadata.write**, **files.content.write** and **files.content.read**.

Dropbox

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Account info
Permissions that allow your app to view and manage Dropbox account info

☒ **account_info.write** View and edit basic information about your Dropbox account such as your profile photo

☐ **account_info.read** View basic information about your Dropbox account such as your username, email, and country

Files and folders
Permissions that allow your app to view and manage files and folders

☒ **files.metadata.write** View and edit information about your Dropbox files and folders

☐ **files.metadata.read** View information about your Dropbox files and folders

☒ **files.content.write** Edit content of your Dropbox files and folders

☒ **files.content.read** View content of your Dropbox files and folders

Click Submit when you are done making changes. (Existing access tokens will not be affected) [Undo](#) [Submit](#)

- In the Collaboration section, check the boxes for **sharing.write**, **file_requests.write** and **contacts.write**.
- Click the Submit button to apply for your selected permissions.

Dropbox

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☒ files.content.read View content of your Dropbox files and folders

Collaboration
Permissions that allow your app to view and manage sharing and collaboration settings

☒ sharing.write View and manage your Dropbox sharing settings and collaborators

☐ sharing.read View your Dropbox sharing settings and collaborators

☒ file_requests.write View and manage your Dropbox file requests

☐ file_requests.read View your Dropbox file requests

☒ contacts.write View and manage your manually added Dropbox contacts

☐ contacts.read View your manually added Dropbox contacts

OpenID Scopes

Scopes used for OpenID Connect.

Click Submit when you are done making changes. (Existing access tokens will not be affected) Undo Submit

Dropbox Account Authorization:

- After reviewing the Dropbox setup instructions, click the Next button to proceed.

Dropbox Connector DropBox Setup Accounts Contacts Files Error Logs

Authorization Configuration

Steps to follow

The instructions below in the link will guide you through setting up your DropBox application Process.
[DropBox Guide](#)

NOTE: The above steps must be followed before moving forward.

Next

- After clicking the Next button, you'll see two fields: App key and App secret.
- Enter the App key and App secret that you got from your Dropbox app.
- These are needed to connect Dropbox with Salesforce.

Dropbox Connector DropBox Setup Accounts Contacts Files Error Logs

Authorization Configuration

* App key
type App key here...
Complete this field.

* App secret
type App secret here...
Complete this field.

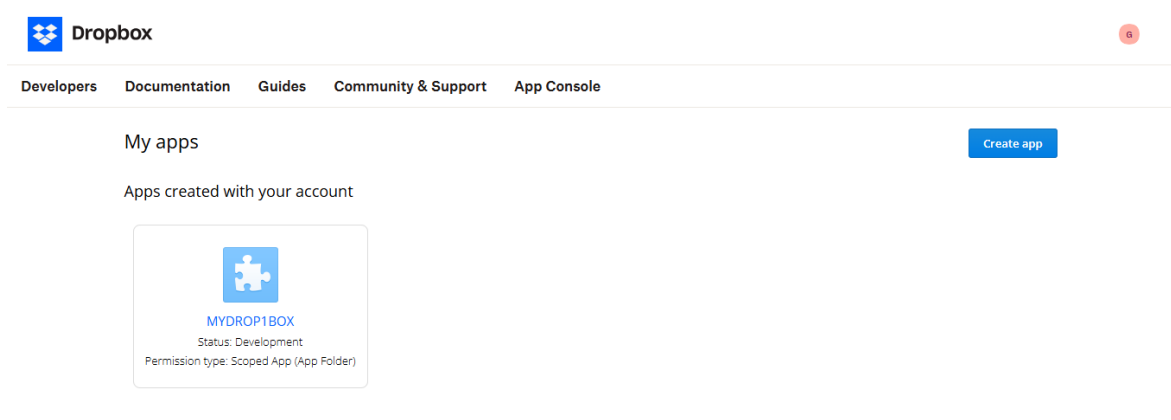
Back Validate

Information

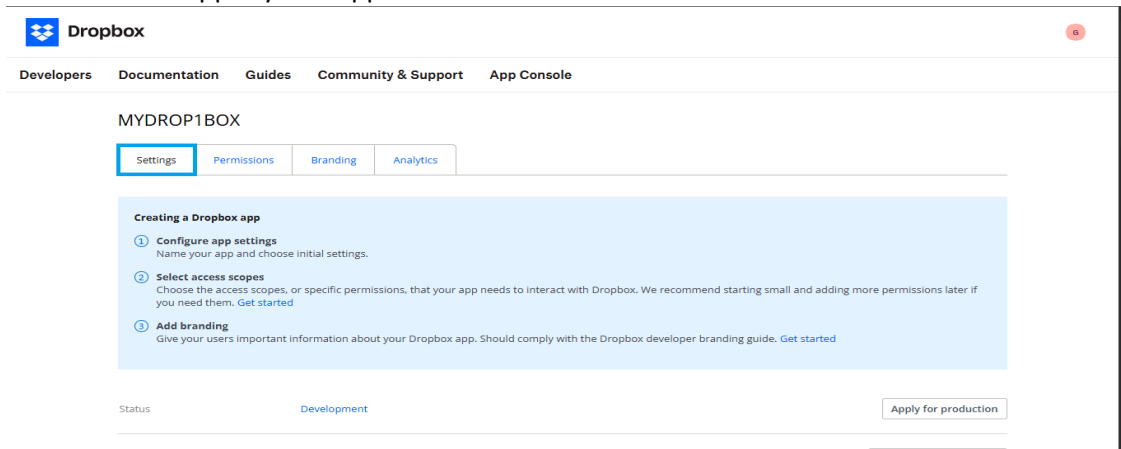
--> **App key** and **App Secret** are credentials used for secure communication between the **DropBox** and the **Salesforce**.

--> After creating the app as mentioned in the previous slide, you can click on the app name and then click on the **"Settings"** tab to view the app key and app secret.

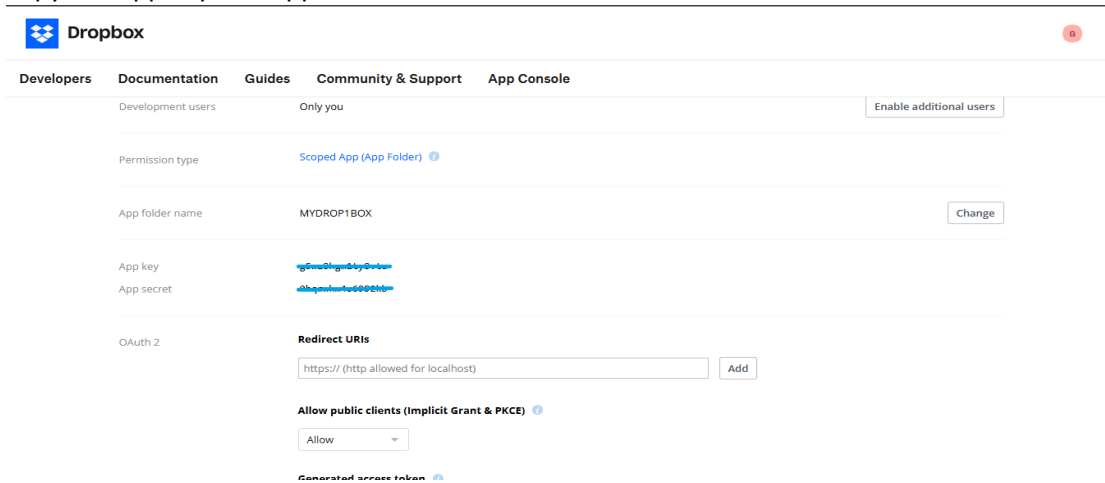
- Go back to your Dropbox account.
- Click on the App Console tab at the top.
- Find the app you created earlier and click on its name to open it.



- Click on the Settings tab at the top of the page (highlighted in the screenshot) to view your app details like the App key and App secret.



- Scroll down to the Settings page.
- Copy the App key and App secret from this section.



- Go back to the Authorization screen in Salesforce.
- Paste the App key and App secret into their respective fields.

The screenshot shows the 'Dropbox Connector' interface in Salesforce. The 'Authorization' tab is selected, displaying input fields for 'App key' and 'App secret'. A 'Validate' button is present at the bottom of the form. To the right, an 'Information' panel provides context: it states that the App key and App secret are credentials for secure communication between Dropbox and Salesforce, and instructs the user to click on the app name in the previous slide and then on the 'Settings' tab to view these credentials.

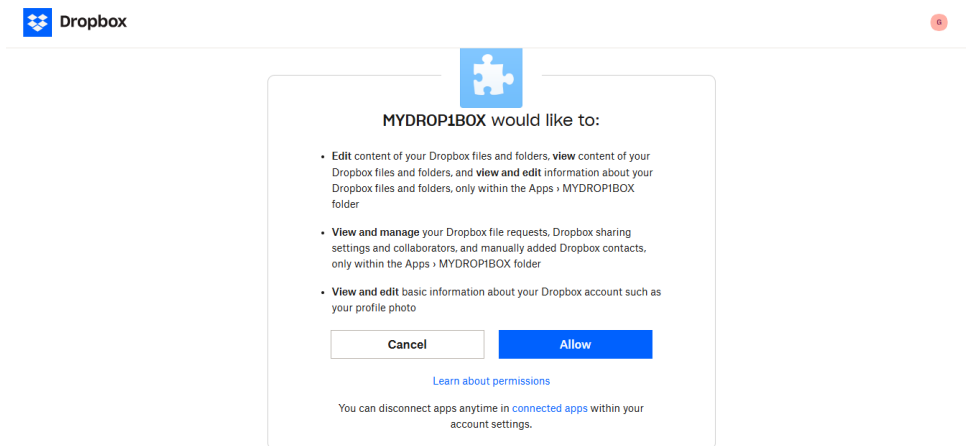
- Click the "Validate" button.
- If the information is correct, the system will show a success message.
- A Dropbox Authorization pop-up will appear. Click the OK button to continue.

This screenshot shows the same 'Dropbox Connector' interface, but now with a green success message at the top: 'Success Validation Successful.' A 'Dropbox Authorization' pop-up window is centered on the screen. The pop-up text reads: 'To complete the Authorization we have to redirect you to a new page where you will be provided by a code, please paste the code into the next popup screen. Click Ok to Continue...'. It includes 'Cancel' and 'Ok' buttons.

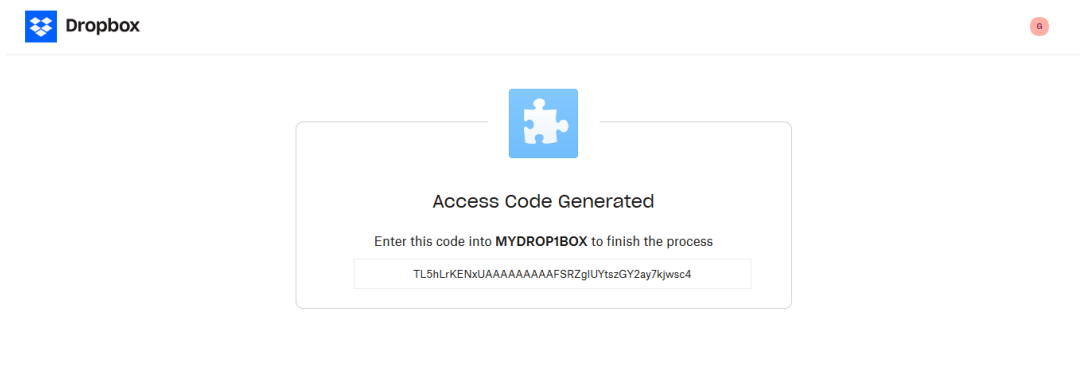
- You'll see a warning message.
- Click the Continue button to move forward with the connection.

The screenshot shows a warning dialog from Dropbox. At the top, it says 'Before you connect this app...'. Below this, it advises: 'Make sure that you know and trust this developer. Allowing apps from developers you don't know may put your data at risk.' A text box explains: 'Why am I seeing this warning? This app only has a small number of users and may not be the app you were intending to link.' At the bottom, there are 'Cancel' and 'Continue' buttons. A final note at the very bottom says: 'Click Cancel if you are unsure whether you should be connecting an app to your Dropbox account. You can also learn more about [what to look for when connecting an app](#).'

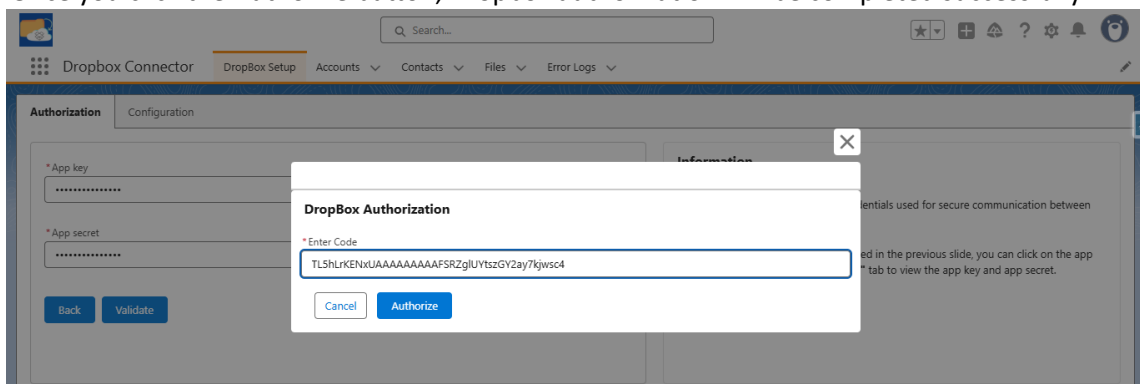
- Click the Allow button.



- After clicking the Allow button, Dropbox will generate an access code.

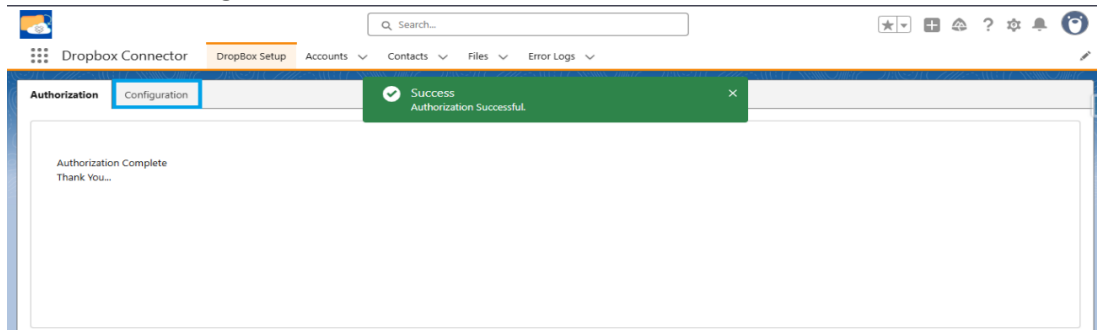


- Copy the access code that Dropbox provides.
- Go back to the Dropbox Authorization page in Salesforce.
- A pop-up box will appear asking for the access code.
- Paste the copied access code into the field provided.
- Once you click the Authorize button, Dropbox authorization will be completed successfully.



Configuration Page Setup Steps:

- Click on the **Configuration** tab.



- On the **Configuration** tab, you'll see that all fields are already filled in by default, such as: File Preview Options, Root Folder, Max. Delete Count, Days to Delete Error Logs.
- You can review these values and make changes if needed based on your requirements.

File Preview Options:

In this field, you can choose how you want to view uploaded files. There are two options:

- Within Salesforce - The file will open on the same page inside Salesforce.
- New Browser Tab - The file will open in a separate browser tab.

Max. Delete Count:

This field allows you to set the number of uploaded files that can be deleted at once.

- You can enter a value between 0 to 50.
- This helps control bulk deletion and prevents accidental mass removal of files.

Days to Delete Error Logs:

In this field, you enter the number of days you want to keep error logs

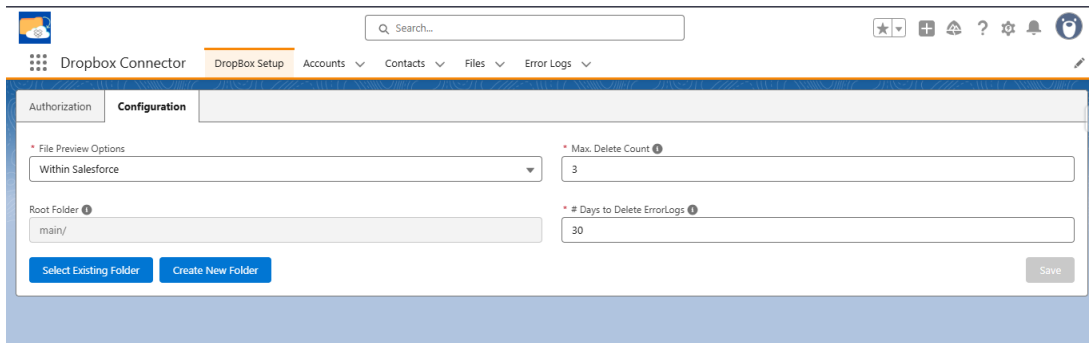
- The system generates an error log in the backend whenever an issue occurs during any step.
- These logs help identify the exact cause of the issue.

Root Folder:

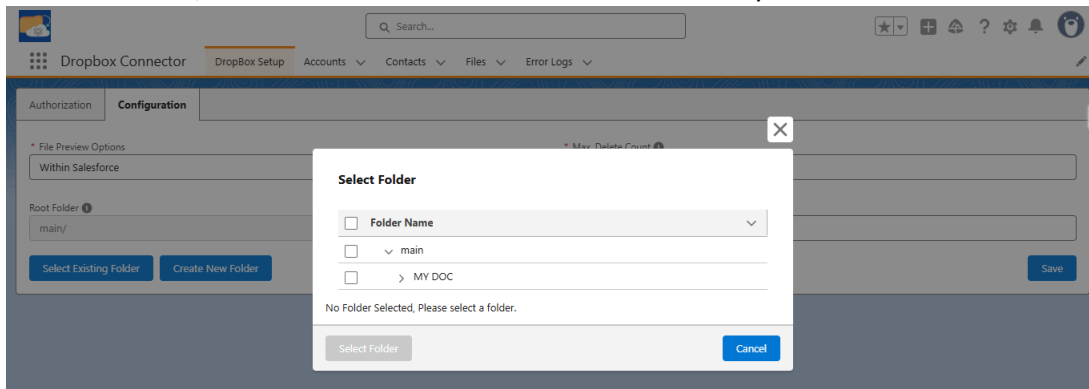
This setting determines where your uploaded files will be stored in Dropbox.

You have two options Select Existing Folder and Create New Folder.

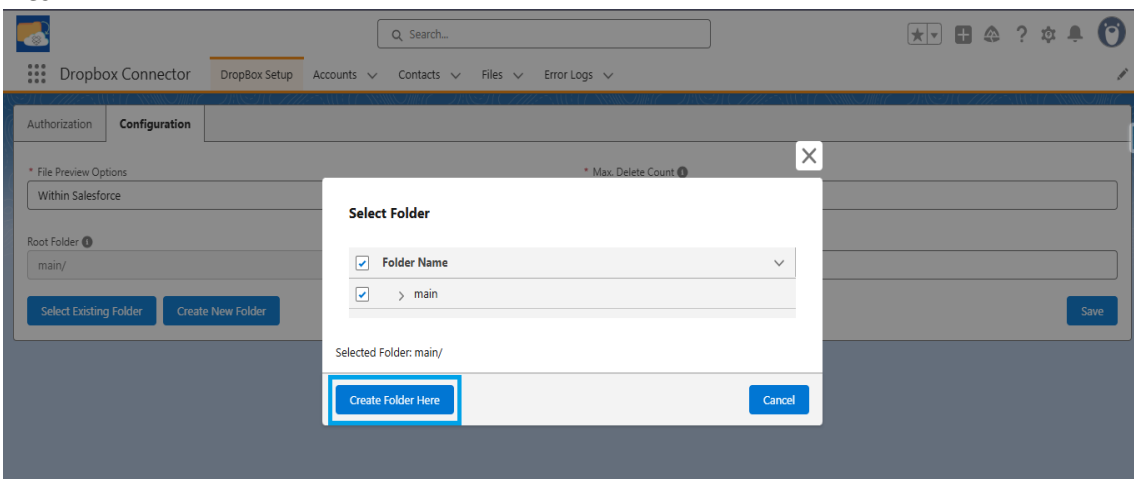
- Select Existing Folder - Use this option if a folder already exists in your Dropbox account and You can choose that folder to store the uploaded files.
- Create New Folder - Use this option to create a brand-new folder in Dropbox and the new folder will be used to store all uploaded files.



- Click the Select Existing Folder button.
- A list of folders from your Dropbox account will appear.
- Since I have only one existing folder, that folder will be shown automatically.
- Select the folder, then click the Select Folder button to confirm your choice.

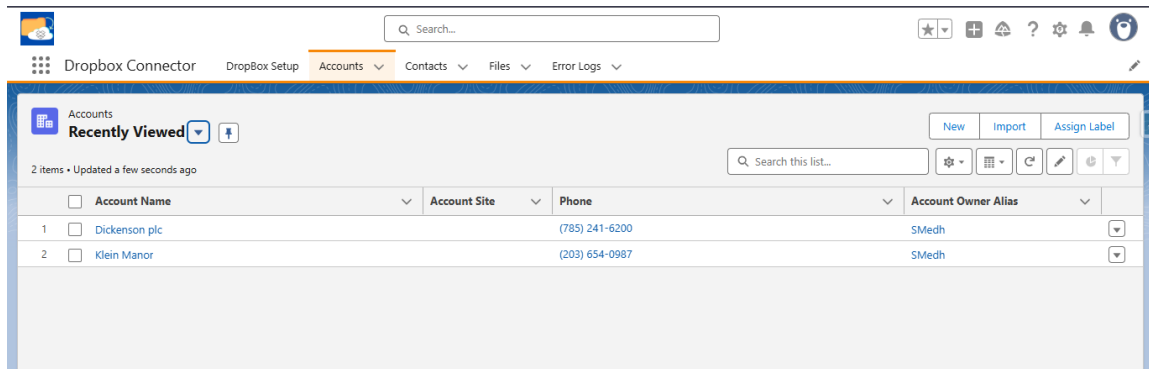


- Click on the Create New Folder option.
- A screen will appear asking you to select the main folder, and this main folder is automatically created in Dropbox when you first create your app.
- Select the main folder.
- Then click the Create Folder Here button to create a new folder inside it for storing uploaded files.

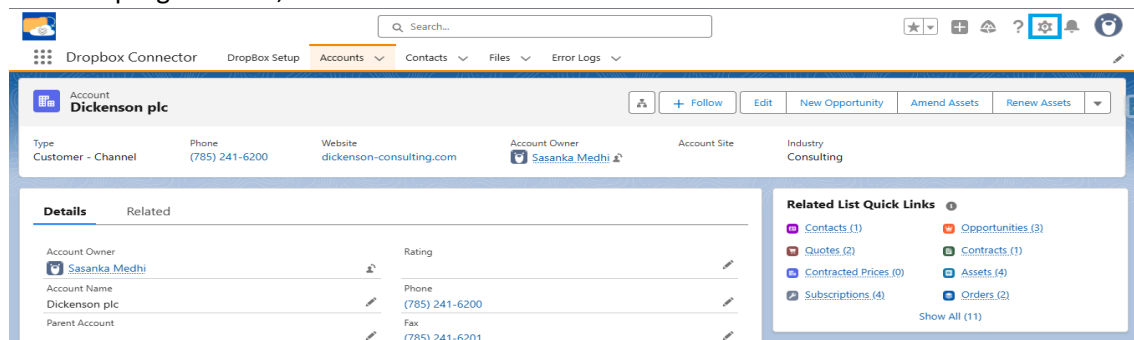


Steps to Add the Dropbox Component on a Record Page:

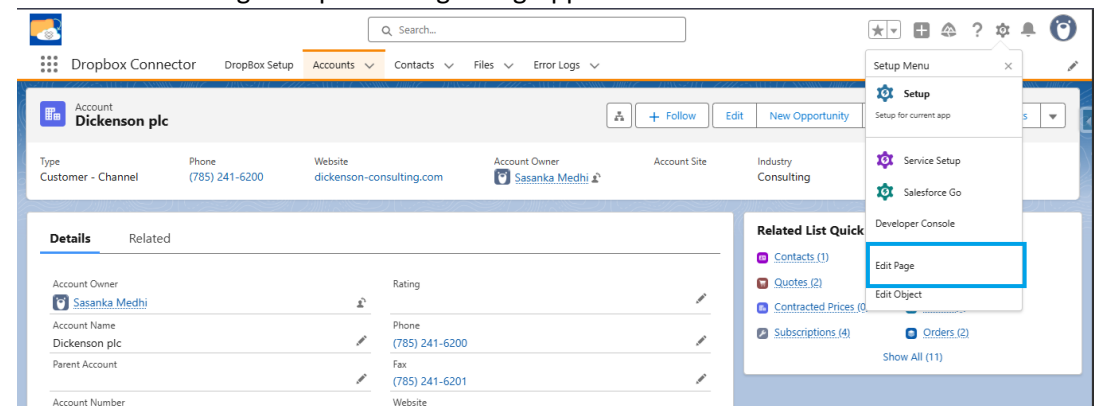
- Open the object where you want to upload your documents.
- In this example, we are using the Account object to store documents.
- So, we will add the Upload Document component to the Account record page.



- Open any Account record in Salesforce.
- At the top-right corner, click on the Gear icon.

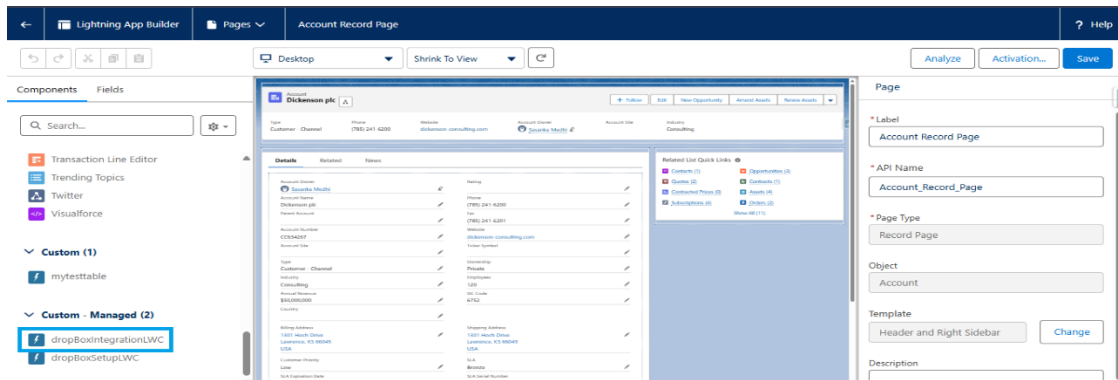


- Click on the Edit Page to open the Lightning App Builder.



- On the Lightning App Builder Page On the left-hand side, scroll down through the list of components.
- Find the Dropbox Integration (LWC) component under the Custom – Managed section.

- Drag the Dropbox Integration component and drop it onto the desired section of the Account page layout.
- Once placed, click the Save button at the top right corner.



- Now, go back to the Account record page.
- You will see the Dropbox Integration component displayed on the page.

