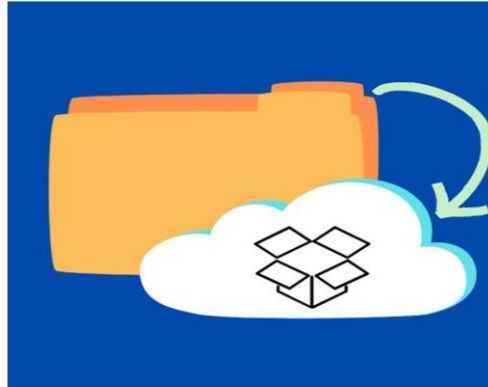




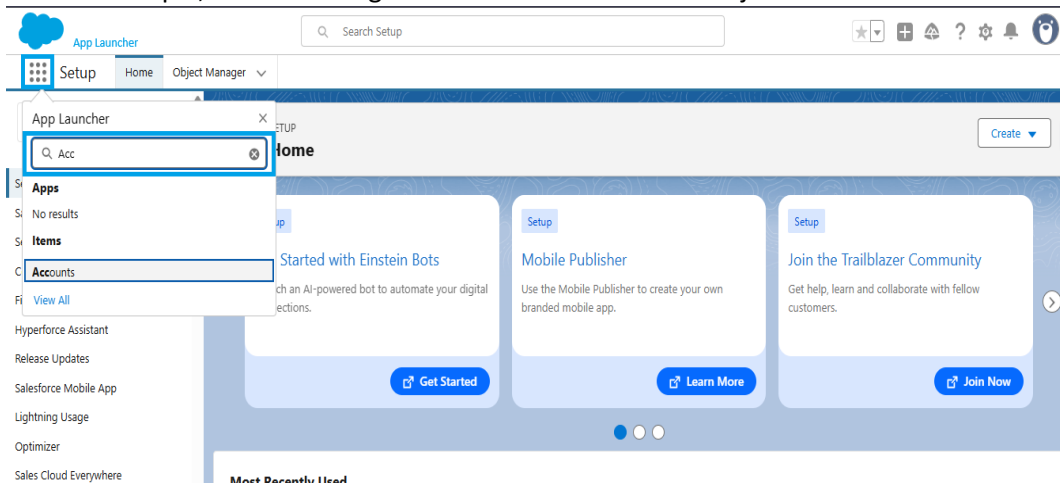
DROPBOX CONNECTOR

USER GUIDE

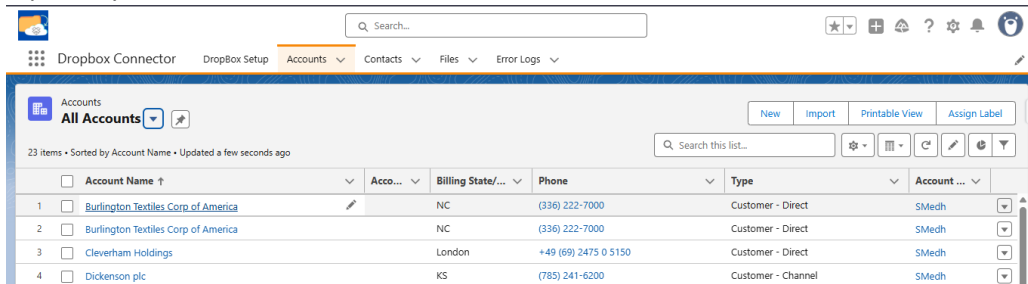
We created a simple app called “**Dropbox Connector**” in Salesforce that allows smooth integration between Dropbox and Salesforce. With this app, users can upload, download, preview, edit, delete, and manage Dropbox files directly within Salesforce. They can also link files to specific Salesforce records like accounts or opportunities for better document tracking. The app offers features like real-time file sharing, one-way syncing from Dropbox to Salesforce, and secure access control, ensuring that only authorized users can view or manage sensitive information.

Steps to Upload Files:

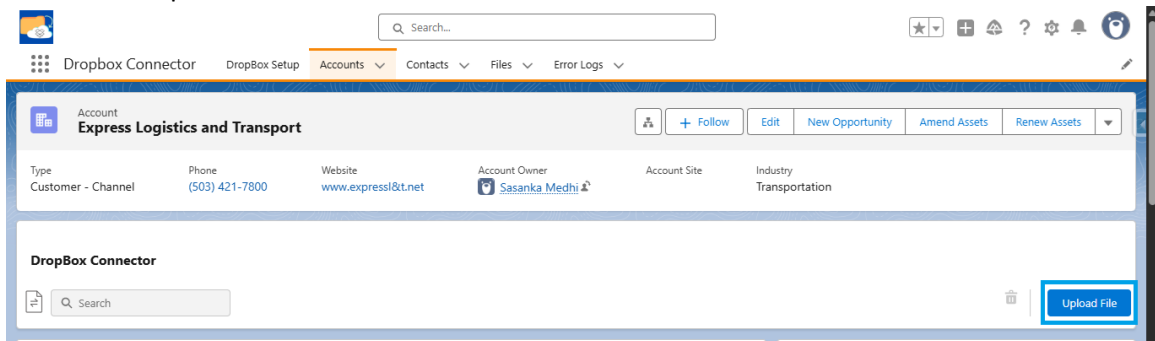
- Go to the **App Launcher** in Salesforce.
- In the search bar, type the name of the object where you want to store your document.
- For this example, we are storing documents in the **Account** object.



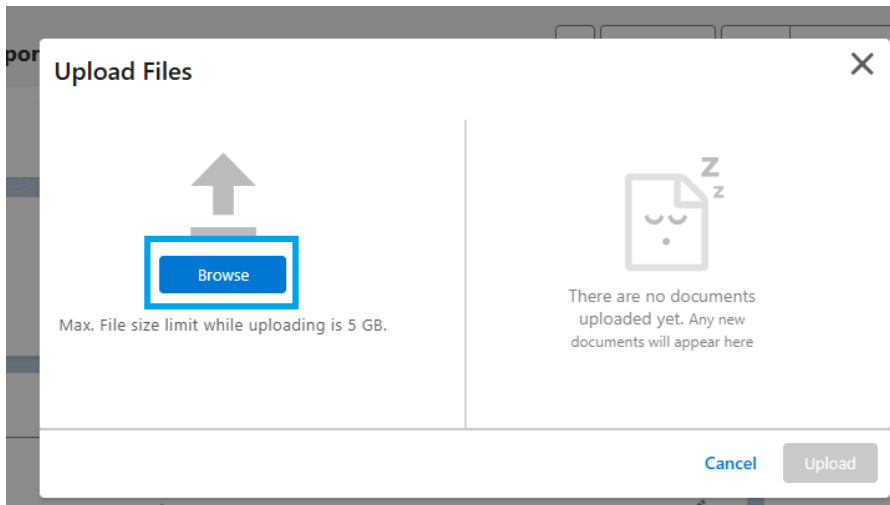
- Open any Account record.



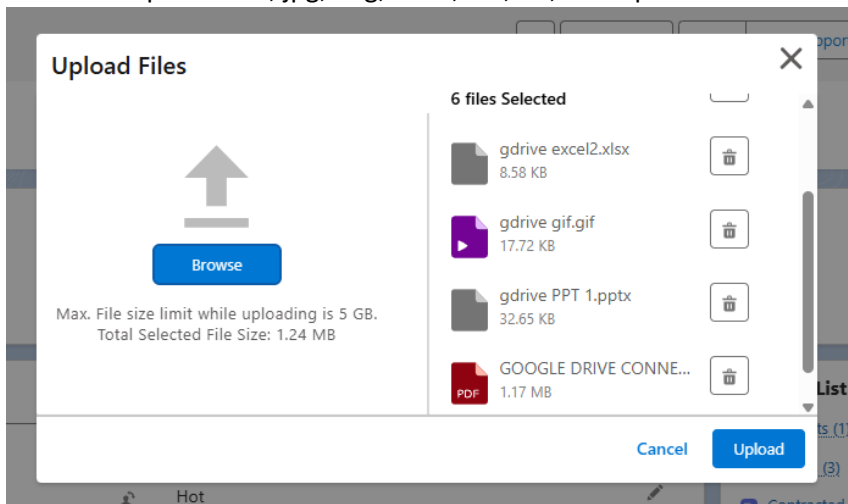
- Then, scroll down and you will see the Dropbox connector component.
- Click on the upload file button.



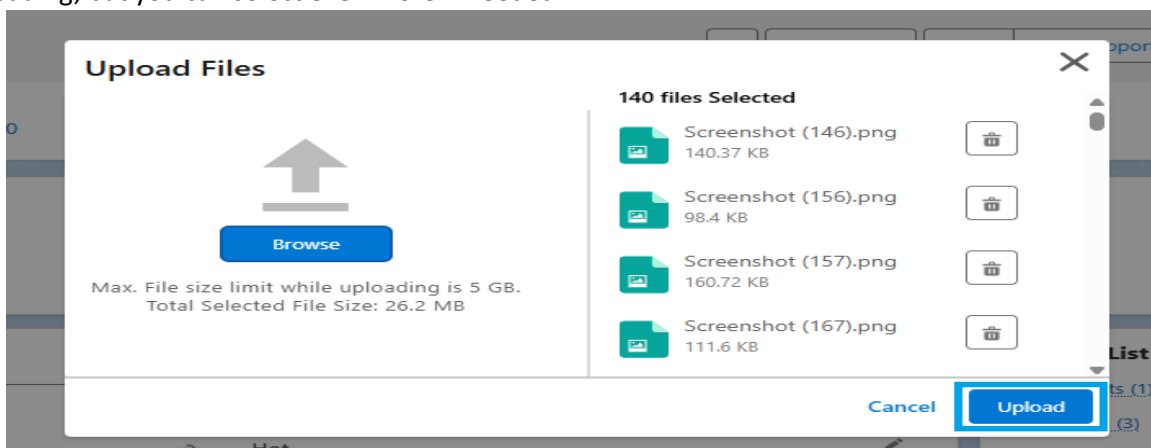
- Click on the browse button and files from Pc.



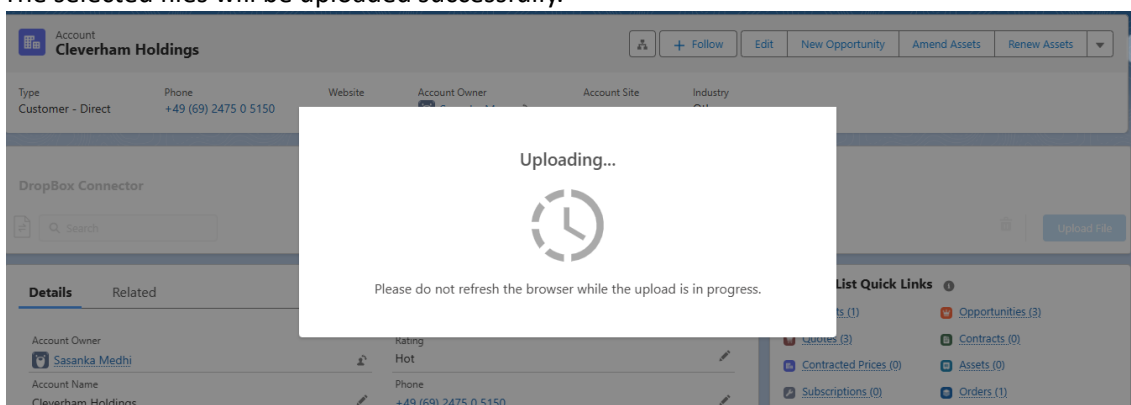
- Users can upload Pdfs, jpg, Png, excel, Csv, txt, and zip etc.



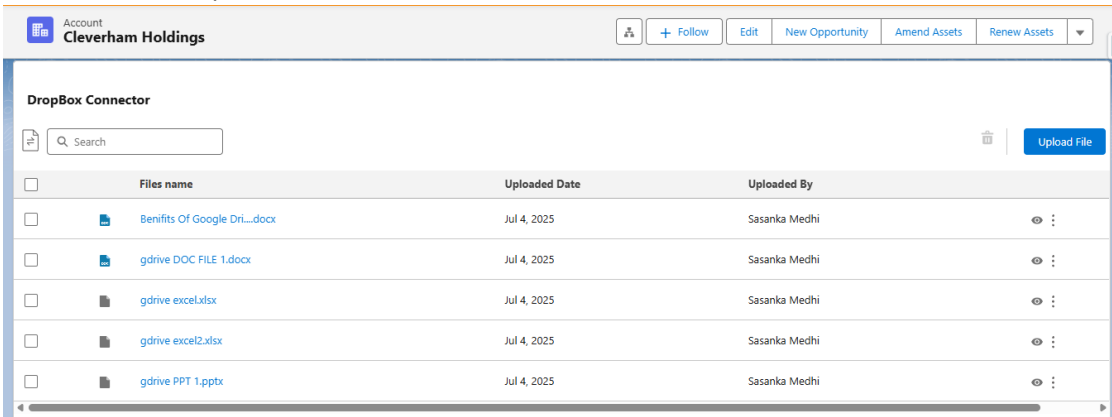
Note: There is no limit to the number of files you can upload. In this example, I selected **140 files** for uploading, but you can select even more if needed.



- Click on the **Upload** button.
- The selected files will be uploaded successfully.



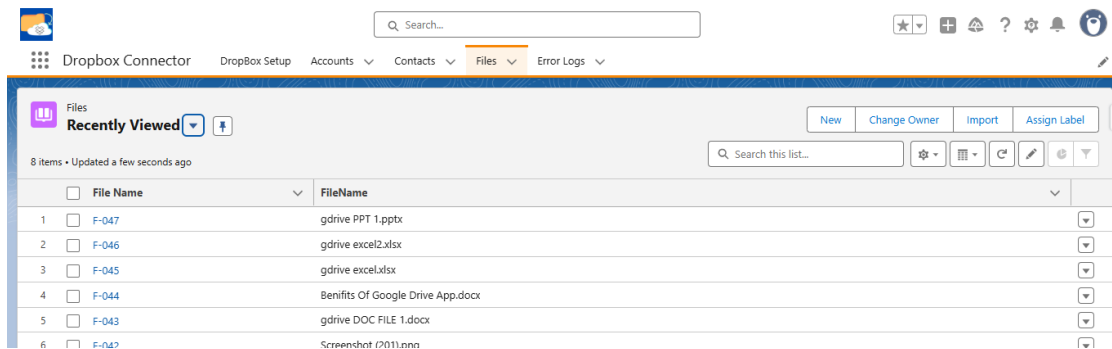
- Here are all the uploaded files.



The screenshot shows the 'DropBox Connector' interface for 'Cleverham Holdings'. It features a search bar, an 'Upload File' button, and a table of uploaded files.

☐	Files name	Uploaded Date	Uploaded By	
☐	Benifits Of Google Dri...docx	Jul 4, 2025	Sasanka Medhi	👁 ⋮
☐	gdrive DOC FILE 1.docx	Jul 4, 2025	Sasanka Medhi	👁 ⋮
☐	gdrive excel.xlsx	Jul 4, 2025	Sasanka Medhi	👁 ⋮
☐	gdrive excel2.xlsx	Jul 4, 2025	Sasanka Medhi	👁 ⋮
☐	gdrive PPT 1.pptx	Jul 4, 2025	Sasanka Medhi	👁 ⋮

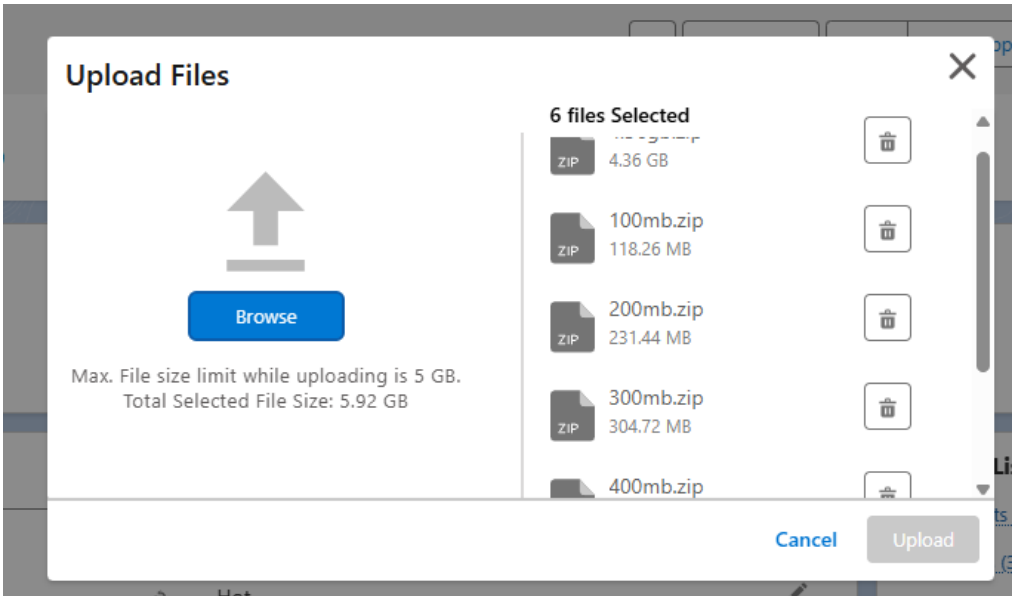
- All uploaded files will be visible in the **Files object**.



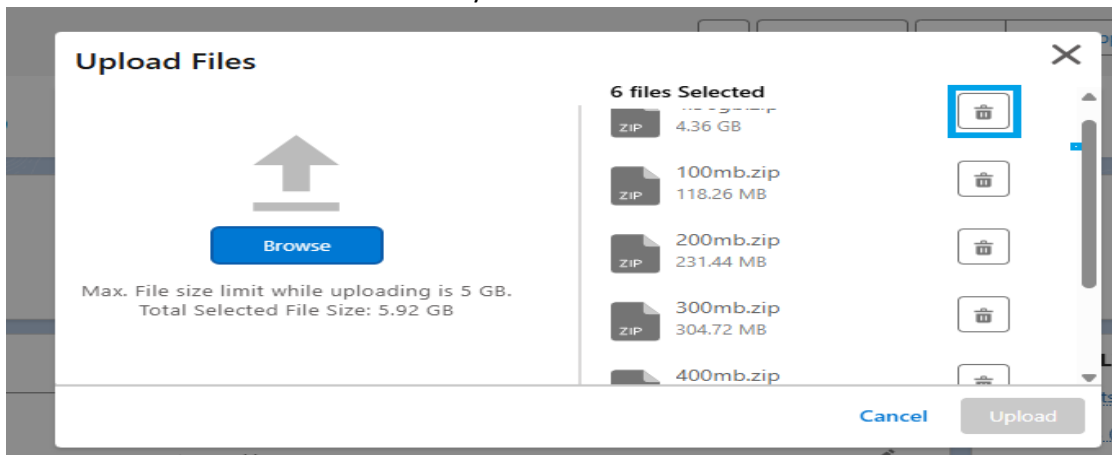
The screenshot shows the 'Files' section of the interface, displaying a list of 'Recently Viewed' files. The table lists 8 items, including various document and presentation files.

☐	File Name	FileName	
☐	F-047	gdrive PPT 1.pptx	⌵
☐	F-046	gdrive excel2.xlsx	⌵
☐	F-045	gdrive excel.xlsx	⌵
☐	F-044	Benifits Of Google Drive App.docx	⌵
☐	F-043	gdrive DOC FILE 1.docx	⌵
☐	F-042	Screenshot (2011).png	⌵

- If the user selects files totaling more than **5GB**, the **Upload** button will be automatically disabled.

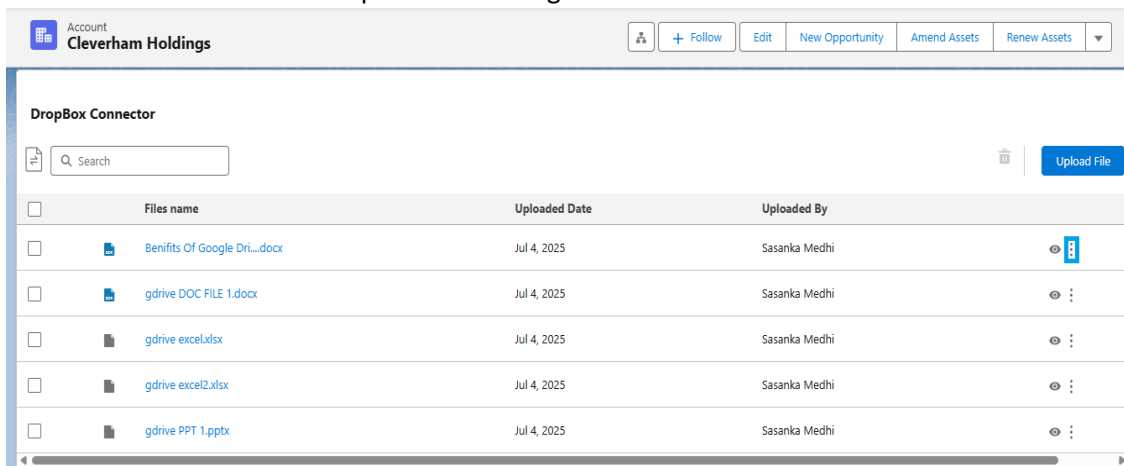


- A **Delete** icon is available to remove any file from this screen.

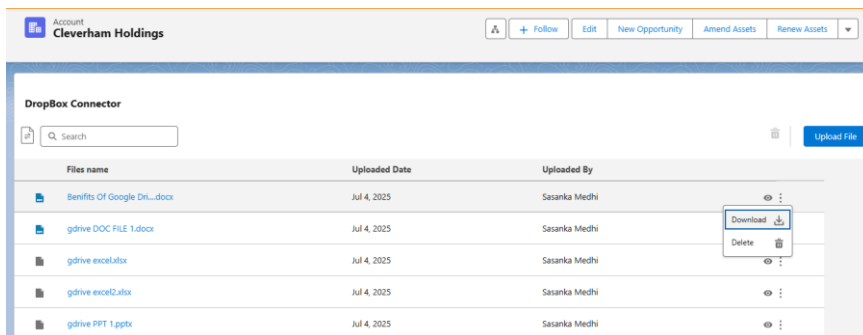


Steps for File Download:

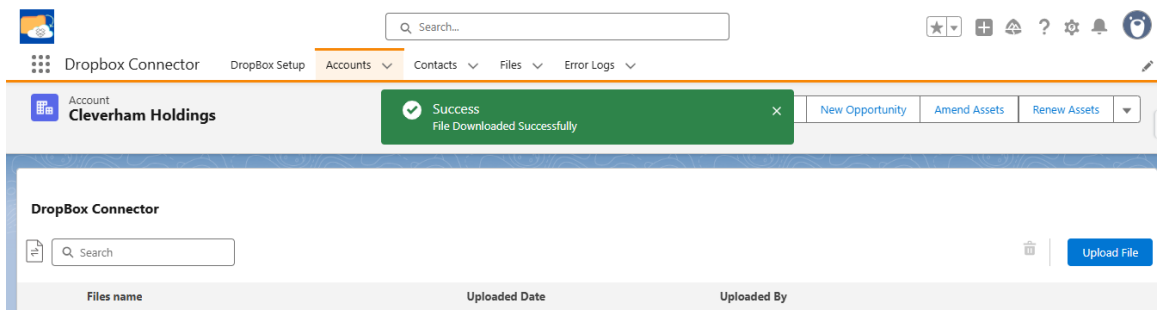
- Go to Application Launcher, select Account.
- Open any Account record.
- Then, scroll down and you will see the Dropbox connector component.
- User will see the list of Uploaded Files on Dropbox connector page.
- Click on three dots which are placed on the right side of view icon.



- Click on the download icon button.

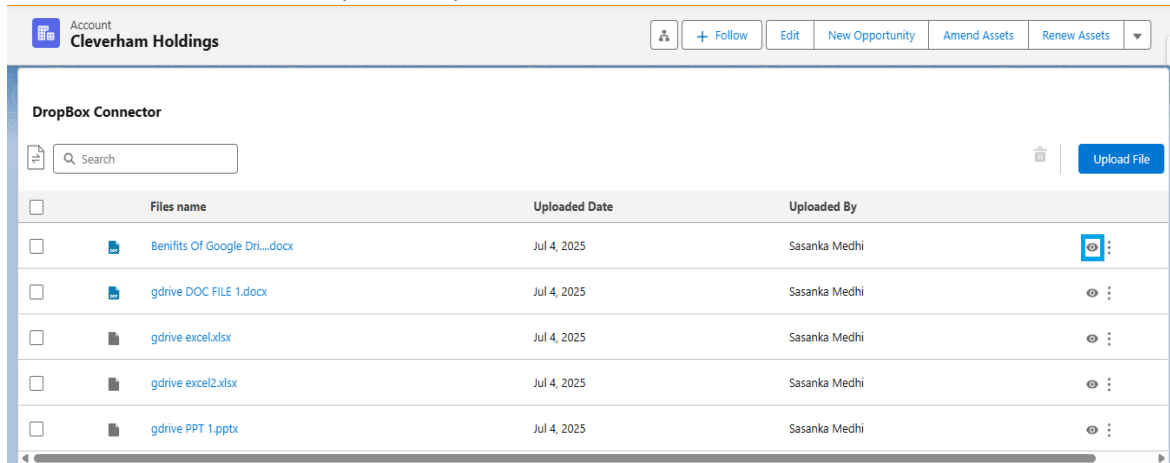


- We can download one file at a time.

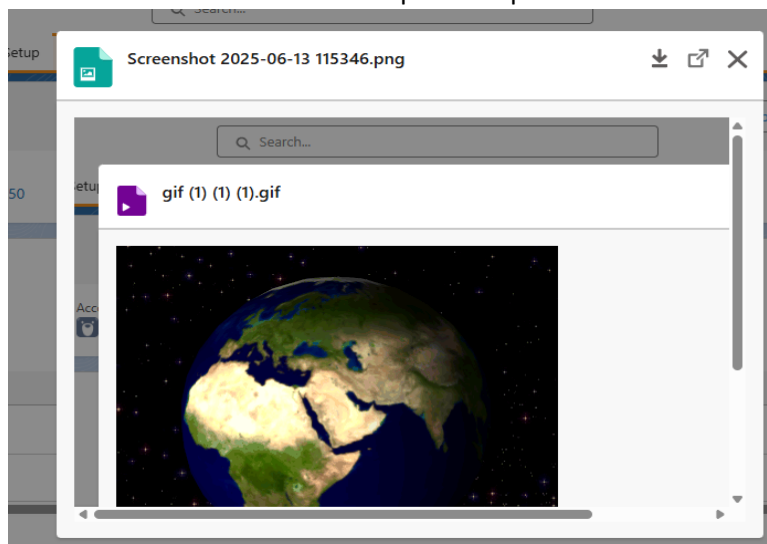


Steps for File Preview:

- Go to Application Launcher, select Account.
- Open any Account record.
- Then, scroll down and you will see the Dropbox connector component.
- User will see the list of Uploaded Files on Dropbox connector page.
- Click on the view icon for any of the uploaded files.



- When we choose the salesforce option for preview then it's shown like this.

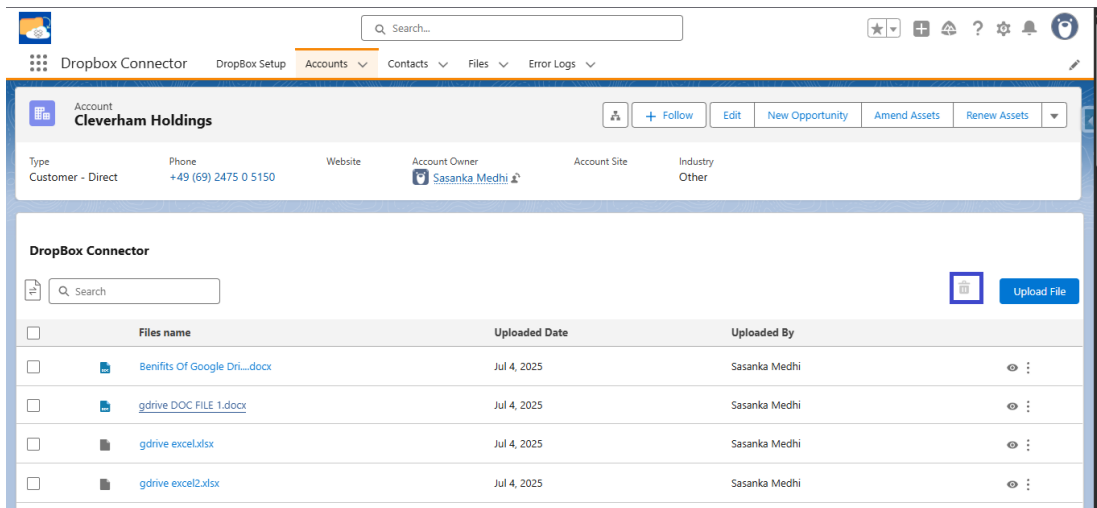


- When we choose the browser option for preview then it's shown like this.

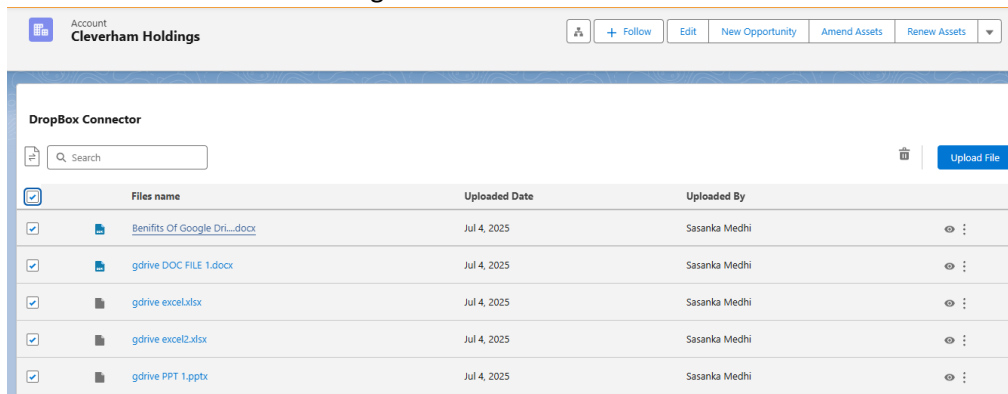


Steps for Multiple Files Delete:

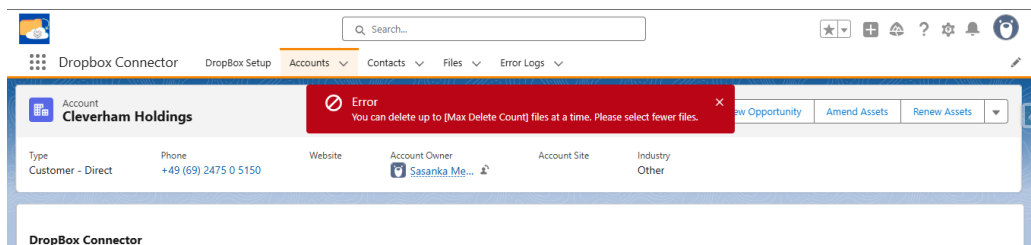
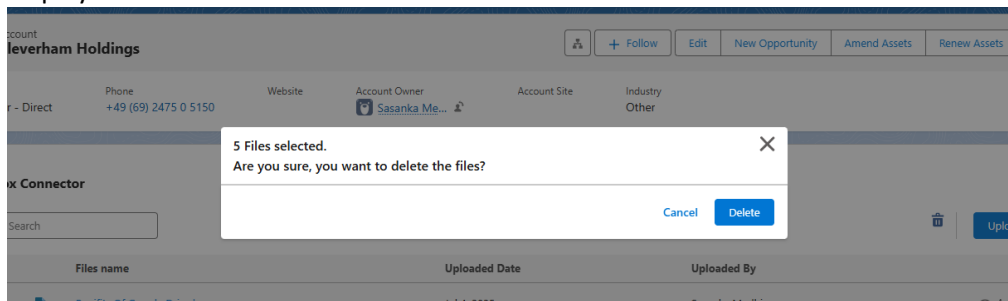
- Go to Application Launcher, select Account.
- Open any Account record.
- Then, scroll down and you will see the Dropbox connector component.
- User will see the list of Uploaded Files on Dropbox connector page.
- The button is disable.



- Then we select files for deleting and the delete icon is enabled.



- Click on the delete icon.
- A Pop-up message is displayed on screen.
- Click the delete button.
- Your Files Will be deleted.
- In the Configuration tab, there is a field called 'Max. Delete Count'. The value is set by the admin. Currently; it is set to 3. If a user tries to delete more than three files, an error message is displayed.



Note: The admin can change this value, and it must be set between **0** and **50**.