Alfresco Enterprise

Alfresco for Salesforce

Contents

Alfresco for Salesforce....................3
Installing and configuring Alfresco for Salesforce....................3
Installing the Alfresco for Salesforce application....................3
Configuring the Alfresco for Salesforce application....................4
Using Alfresco for Salesforce....................6
Attaching files to a content item....................6
Editing attachments....................6
Deleting attachments....................7
Viewing attachments....................7

Alfresco for Salesforce

This topic provides an overview of the Alfresco for Salesforce application.

The Alfresco for Salesforce application offers document management capabilities to Salesforce CRM users and is accessible directly from within Salesforce. It allows sales teams to manage content from within the Salesforce application, while storing that content in Alfresco in the cloud. Alfresco in the cloud enables review and approval processes, passing the content to other employees or third parties as soon as it is uploaded to Salesforce. The Alfresco for Salesforce application provides the following additional features.

- Full document management support
    - Using the Alfresco for Salesforce application you can upload, share, edit and delete files. It also provides version history and tagging capability.
    - Metadata is carried through from Salesforce to Alfresco.
    - The huge storage capacity offered by Alfresco allows you to save on storage costs.
- Access for non-Salesforce users
    - Using the Alfresco for Salesforce application you can synchronize relevant Salesforce content (for example, RFPs, RFIs, invoices, contracts and all the associated metadata) into Alfresco in the cloud. This allows non-Salesforce users access to the synchronized content, thereby reducing overhead costs and facilitating secure online collaboration with people outside the organization.
- Capability to automate business processes
    - Using the Alfresco for Salesforce application you can configure folder rules to automatically kick off business processes. For example, you could set up rules so that your documents are sent straight to the right people for approval as soon as they are saved in Alfresco (this is based on document type and metadata). You can then track the progress and completion of the approval using your browser or your mobile device.

Installing and configuring Alfresco for Salesforce

The following topics provide instructions on installing Alfresco for Salesforce.

Installing the Alfresco for Salesforce application

This section provides instructions on installing the Alfresco for Salesforce application.

1. Log in to Salesforce.
2. Navigate to **Appexchange**.
3. Choose the **Alfresco for Salesforce** application.
4. Click the **Get it Now** button.
5. Choose the installation location. You can install Alfresco for Salesforce in the production environment or in the sandbox.
6. Accept the terms and conditions.
7. Click **Confirm and Install**.

The **Package Installation Details** window displays. This window contains some of the details for the Alfresco for Salesforce application. These details include the package name, version name, version number, the publisher name and the description of the application.

8. Click **Continue**.

   The **Approve Third-Party Access** dialog box displays.
9. Notice that the **api.alfresco.com** and the **my.alfresco.com** websites are SSL encrypted. Select **Yes, grant access to these third-party web sites**.
10. Click **Continue**.

    The **Approve Package API Access** screen displays. This screen provides details of the custom objects, extended object permissions, general user permissions and administrative permissions.
11. Click **Next**.

    The **Choose security level** screen displays.
12. Select the **Grant access to admins only** radio button.
13. Click **Next**.

    The **Install Package** screen displays.
14. Click **Install**.

    The **Install Complete** screen displays (this may take a while). You have now installed the Alfresco for Salesforce application.

Configuring the Alfresco for Salesforce application

This topic describes how to configure the Alfresco for Salesforce application.

1. Assign Permissions.

   The Alfresco for Salesforce application comes with two sets of permissions:

   - **Alfresco Cloud Document Management Admin**. Users with this set of permissions can access the **Alfresco Administration** tab to connect to an organization or to a specific Alfresco site.

     To be able to configure Alfresco for Salesforce, a user needs to have this set of permissions.
   - **Alfresco Cloud Document Management User**. Users with this set of permissions can attach documents to Salesforce objects like opportunities and accounts and have these documents stored in Alfresco.

     To assign permissions to users:

   a. Navigate to **Manage Users**.

   b. Select **User(s).**

   c. Click **Permission set Assignments**.

   d. Select the permission set you want to assign.

   e. Move the permission to the right by clicking the right arrow.

   f. Click **Save**.

   You have now assigned a particular permission set to a particular user.
2. Authenticate your Alfresco in the cloud account.

   a. Choose **Alfresco for Salesforce** from the **Force.com App** drop down menu.

   The **Alfresco Admin Console** displays.

b. Click **Authenticate**.

The **Alfresco** screen displays.

c. Type your Alfresco cloud account credentials.

The Alfresco for Salesforce application now has access to your Alfresco in the cloud account. The **Alfresco Admin Console** displays.

You need to have an account for Alfresco in the cloud before you can access the Alfresco for Salesforce application.

3. Configure Document Types.

a. Enter a pipe separated list of document types, for example:

```
Agreement|Audio|Consent|Invoice|Note|Order|Photo|
PO|Presentation|Proposal|
Reference|Request|Resume|RFI|RFP|Video
```

b. Click on the **Site** drop down list.

A list of all the Alfresco sites to which you have access displays.

c. Choose the site where you want to store all your documents.

d. Click **Save**.

You have configured the document types.

A default list of document types is available.

4. Modify the Page Layouts to include the Alfresco Documents Object.

The Alfresco for Salesforce application contains four example out-of-the-box page layouts.

- Alfresco for Salesforce Account example
- Alfresco for Salesforce Contract example
- Alfresco for Salesforce Case example
- Alfresco for Salesforce Opportunity example

Using the following steps, you can modify the standard page layouts to use any of these examples.

a. Navigate to the **Page Layouts** section for the type of example you want to use.

For example go to **Setup > Opportunities > Page Layouts**.

b. Click **Page Layout Assignment**.

The **Opportunity Page Layout** window displays.

c. Click **Edit Assignment**. Using this page you can associate a page layout to use as a default for a user of a particular profile.

For example, you can associate the **Alfresco for Salesforce Opportunity Example** page layout with the system administrator profile.

d. Click **Save**.

The Alfresco sample page layout is set as the default page for a system administrator when they are working with an opportunity. You have configured the Alfresco for Salesforce application. You can now create a Salesforce object like an **Opportunity**. Notice that the new **Alfresco Documents** component appears in the object. This component allows you to attach documents that Alfresco manages.

If you choose to add the Alfresco for Documents Visualforce Pages to your own layouts (for example, **OpportunityAlfrescoDocuments**), it is recommended that you choose a width of 100%, a height of 300px and also choose to use scrollbars in your settings.

Using Alfresco for Salesforce

The following topics provide instructions on using the Alfresco for Salesforce application.

You can work on documents attached to Salesforce content items (accounts, cases contracts, and opportunities) within Alfreso using the Alfresco for Salesforce application.

Accounts store information such as name, address, and phone numbers related to an organization's customers, competitors, and partners. Cases document feedback and can be used to track and solve issues. Contracts are written agreements between parties and are used to define the terms for business. Opportunities are business deals that need to be tracked.

Attaching files to a content item

This topic provides instructions on attaching files to a content item (opportunity, account, case or contract).

1. Navigate to the content item you want to attach a file to and scroll down to the **Alfresco** section.
2. Click **Attach file**.

   The **New Document** window displays.
3. Click **Choose File** to select the file you want to attach to the content item.
4. Type the name you want to give to this document in the **Document Name** field or accept the default name (which is the same as the name of the file you want to attach).
5. From the **Document Type** drop down list, select the document type you want to associate with this attachment.
6. Click **Save**.

   Notice that the progress of the file upload is shown as a green progress bar. Your document is now uploaded to Alfresco in the cloud and is attached to the content item. You can now edit, view or delete the attached document within Alfresco. You can also edit the properties of the attachment within Salesforce.

   - A single content item can support no more than 100 attachments.
   - When an Alfresco document is created from within Salesforce, the version number of the document is set to 1.1.

Editing attachments

This topic provides instructions on how to edit the an attachment to a content item (opportunity, account, case or contract).

To edit the attachment to a content item:

1. Navigate to the content item in the **Alfresco** section.
2. Click **Edit** in the **Actions** column next to the attachment you want to edit.

   The **Version Document** window displays.
3. Click **Choose File** and select the document you want to attach to the content item.
4. Type the name you want to give to this document in the **Document Name** field.
5. From the **Document Type** drop down list, select the document type you want to associate with this attachment.

6. Click **Save**.

   You have now edited the attachment.

Deleting attachments

This topic provides instructions on how to delete an attachment from a content item (opportunity, account, case or contract).

To delete an attachment from a content item:

1. Navigate to the content item you want to delete an attachment from and scroll down to the **Alfresco** section.
2. Click **Del** in the **Actions** column next to the attachment you want to delete.

   A message prompts you to confirm the deletion of the attachment.
3. Click **OK** to confirm the deletion.

   The attachment is now deleted from Alfresco in the cloud.

Viewing attachments

This topic provides instructions on how to view an attachment from a content item (opportunity, account, case or contract).

To view an attachment from a content item:

1. Navigate to the content item you want to view an attachment from and scroll down to the **Alfresco** section.
2. Click **View** in the **Actions** column next to the attachment you want to view.

   The **Alfresco-Document Details** opens where you can see the details of the attached document.

   If you have not already authenticated to Alfresco Share, a login page may be displayed.