



User Guide

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Introduction

DocuVault, a Salesforce App by Tvarana allows you to expand and reduce your file storage space on Salesforce as per your needs. Standard Salesforce Document storage limits the file size. DocuVault allows you to store more than the limits without increasing your spend on storage.

DocuVault is a seamless integration between Salesforce and Amazon Simple Storage Service (S3). It allows you to access the benefits of Amazon file storage using pseudo Salesforce file storage. DocuVault is a created for users to upload many huge documents and files using their Salesforce user interface without paying bulky bills to Salesforce.

Use Cases for DocuVault:

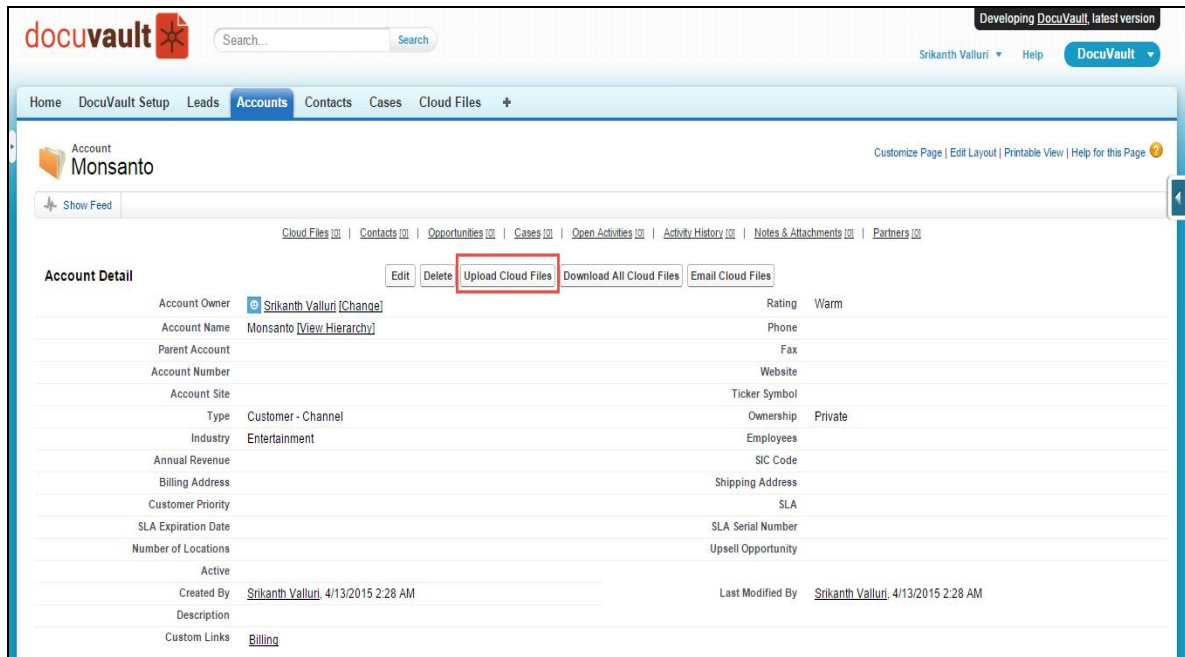
- Document Management & Collaboration
- Archive and Digitize your transaction documents
- Customer and Partner Communities/Portals
- Share large files securely
- Web to Case and Web to Lead attachments
- Salesforce Attachments backup and Archiving
- Distributing Software or other large Files
- Upload large Media Files (Audio & Video)
- Upload Pictures and Videos from Mobile (Field Service Agents, Customers, etc.)

Upload

Upload Document

You can upload documents for all records on any Custom objects or Standard objects like Leads, Accounts, etc.

To upload a document:



- Go to any object (standard or custom).
- Select any Record from the Records list.
- On the Record Detail View page, click **Upload Cloud Files** to upload any files/documents.

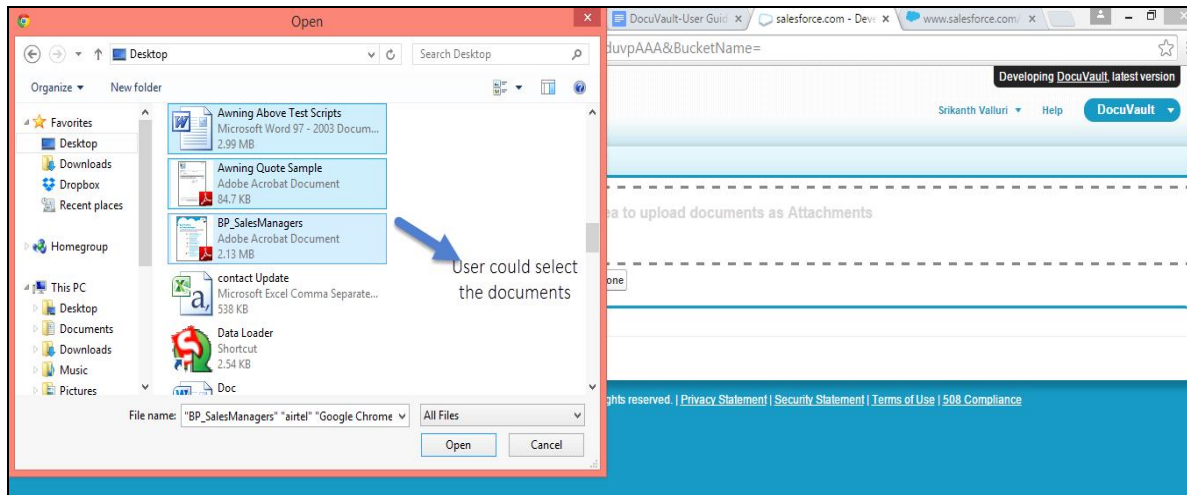
In order to upload, you can select or drag-and-drop the files to file upload section.



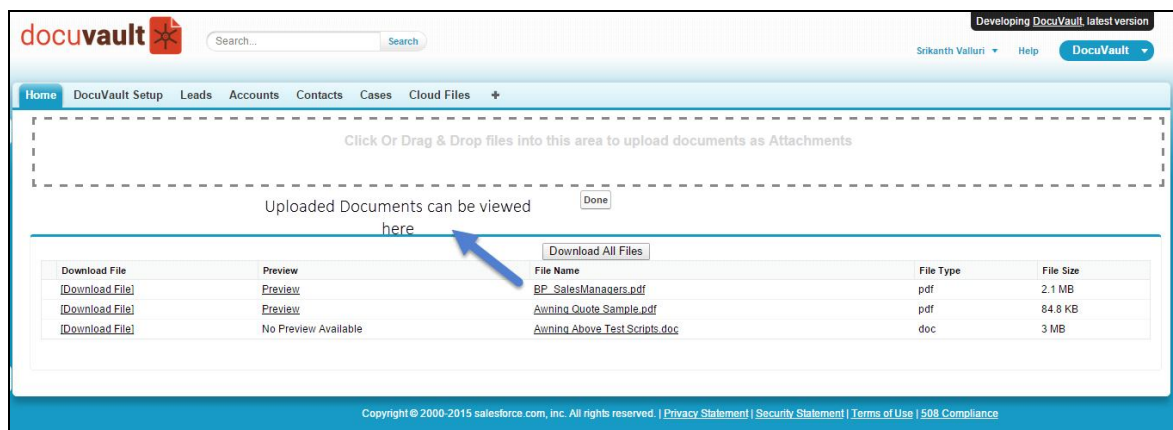
You can add files to file upload section in two ways.

- **Select Method**

You need to select the documents from your system to upload on that particular Record.

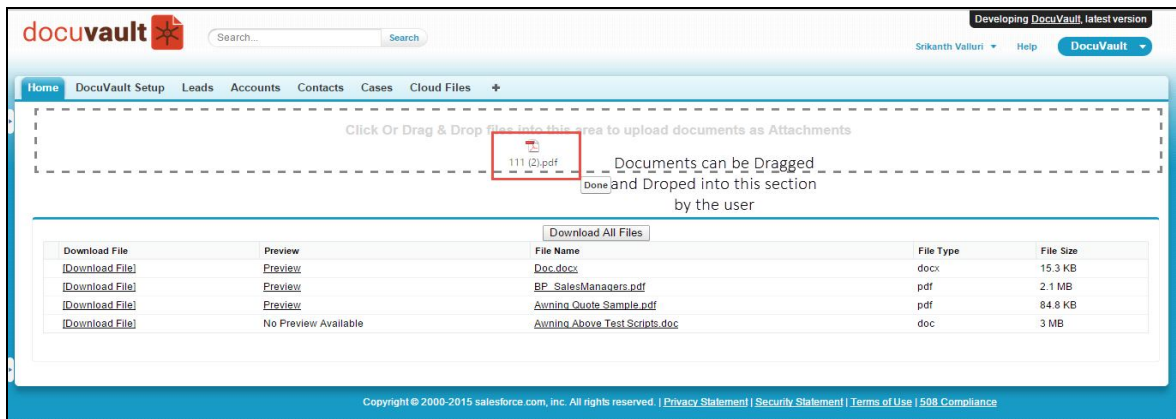


Once the documents are uploaded, you can view the list of uploaded files below the section.

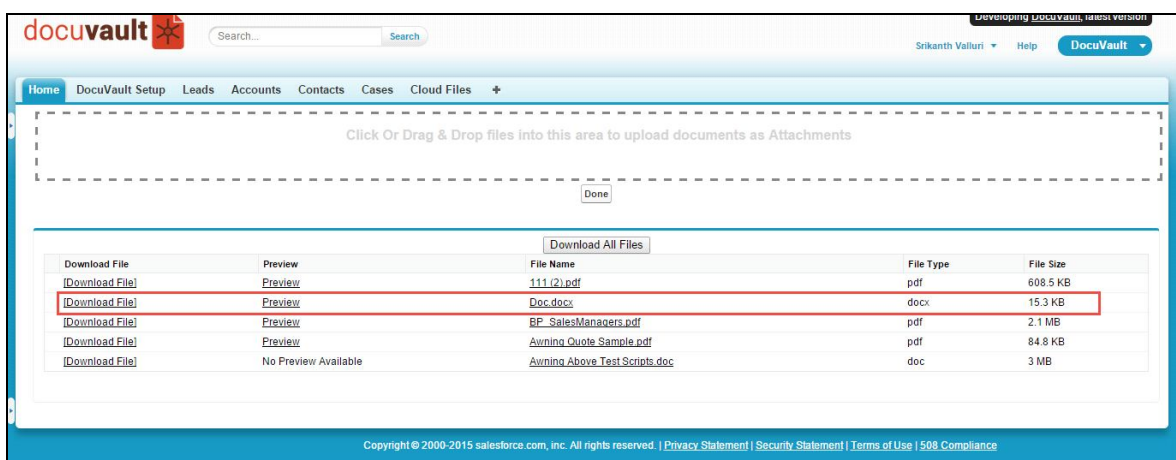


- **Drag & Drop Method**

The files on the system can be easily dragged and dropped to this section. The file uploading initiates after the files are added onto this section.

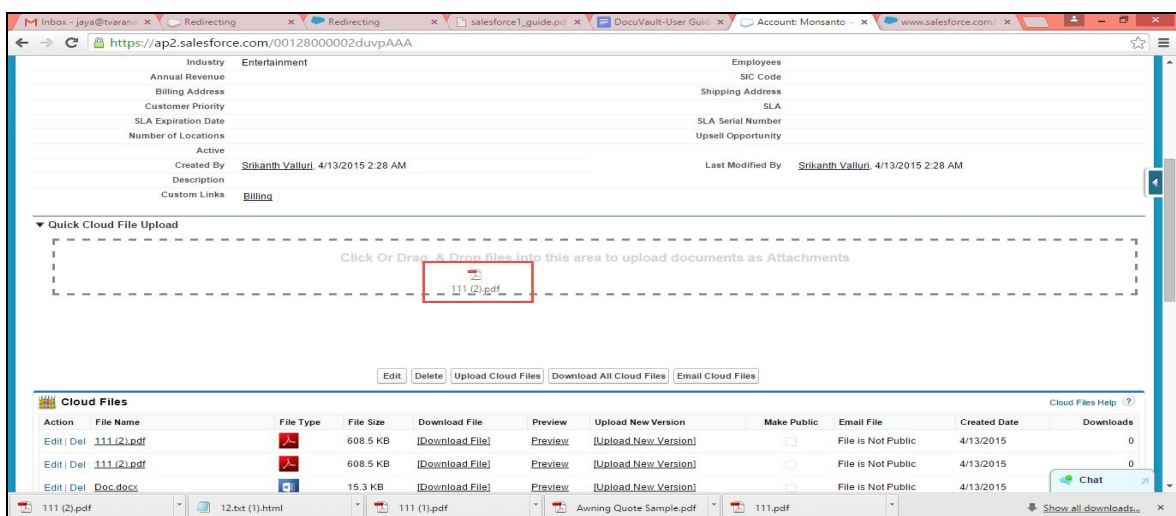


Upon successful uploading, the uploaded files can be viewed below the section.

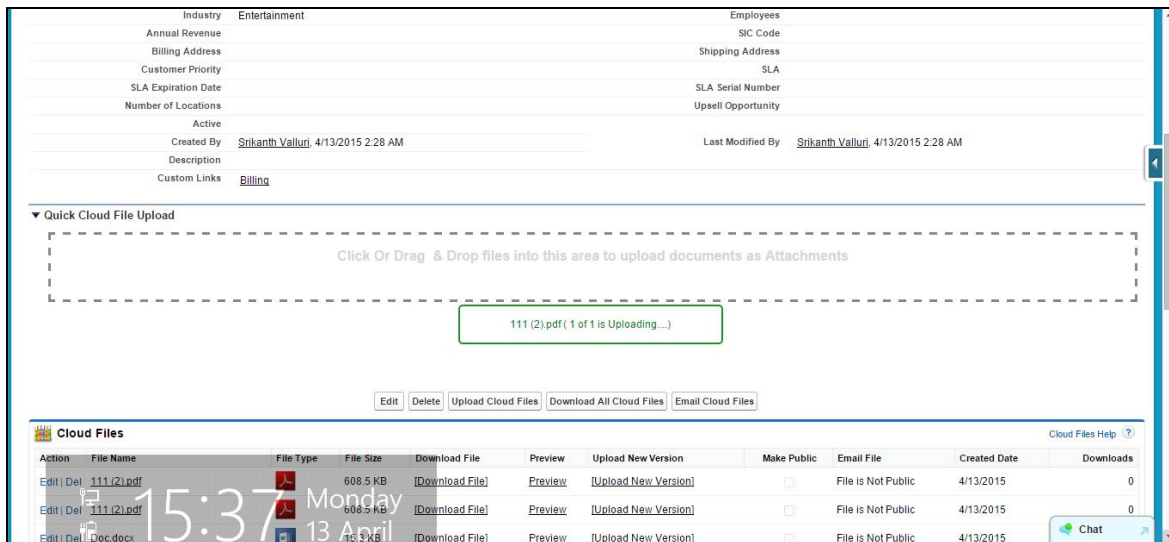


Quick Upload

You can easily upload documents on the Record Detail View by dragging and dropping the documents to **Quick Cloud File Upload** section.

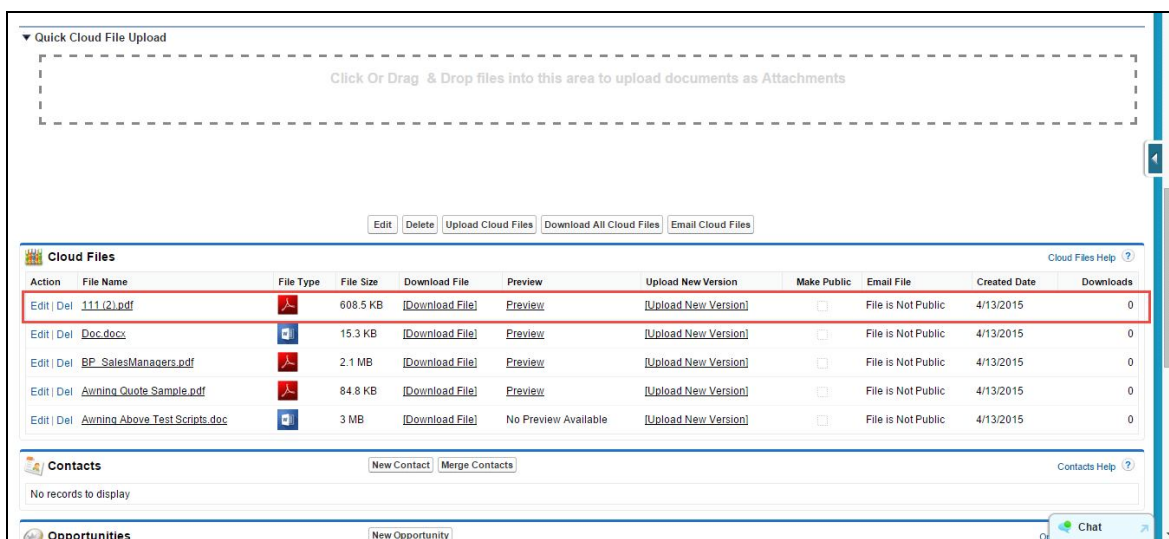


File upload is in process.



- Once the file has been uploaded successfully, click **Done** to conclude file uploads.

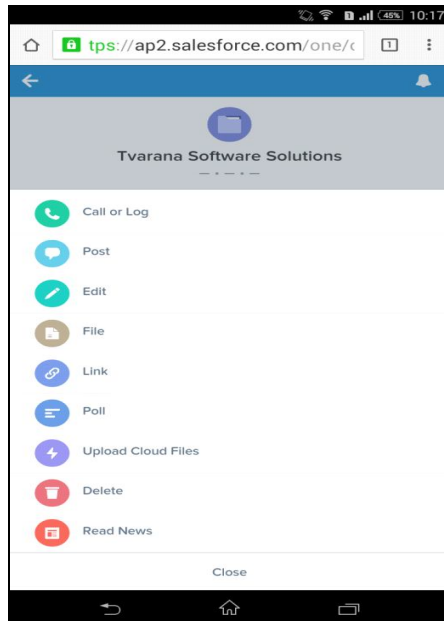
The newly uploaded files can be viewed under Cloud Files section.



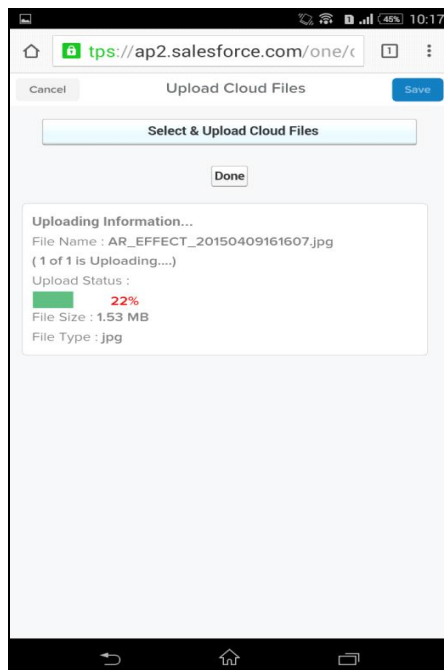
Salesforce 1 Upload

You need to log in to Salesforce1 app in order to access Salesforce on your mobile device.

- Click on any record, and click Public Actions button (⋮).

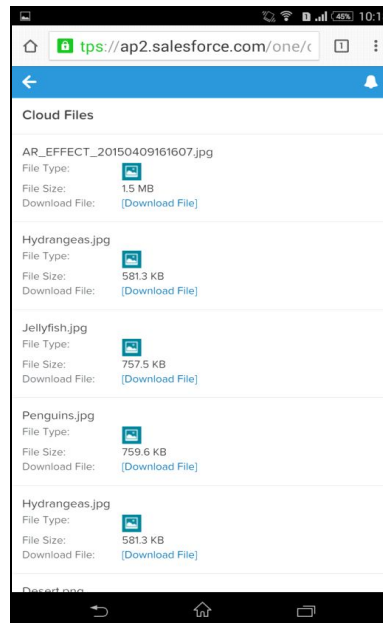


On clicking **Upload Cloud Files** button, you will be directed to Upload Cloud Files page.



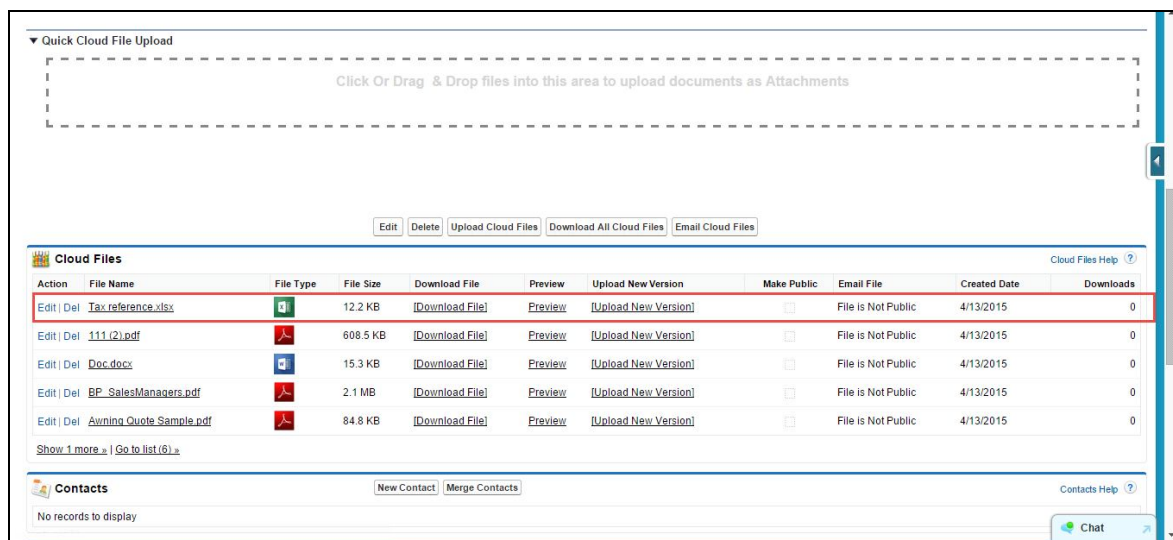
- Click **Select & Upload Cloud Files** to upload the documents.
- Click **Done** upon successful uploading of the documents.

You can navigate to Related tab and select **Cloud Files** folder to view the uploaded documents.



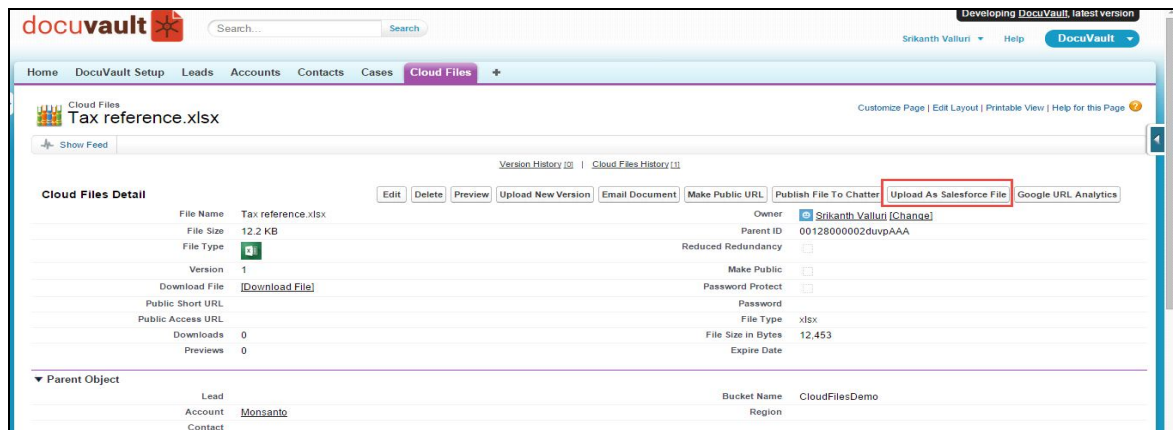
Salesforce File Upload

This option enables you to upload any Cloud File as a Salesforce File.



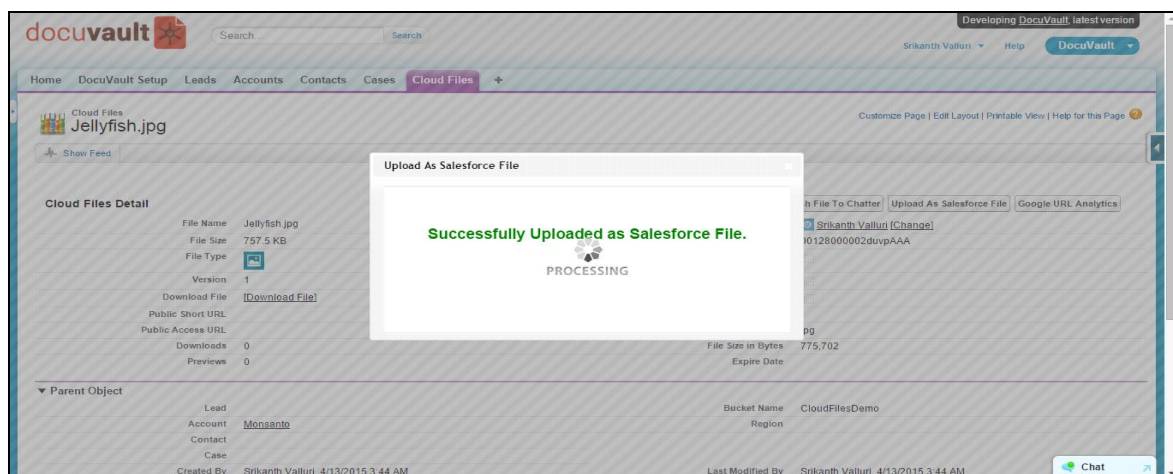
- Go to **Cloud Files** section, and click on the file.

You will be directed to a page displaying attributes of the file.



- By clicking **Upload as Salesforce File**, the document can be uploaded as a Salesforce file.

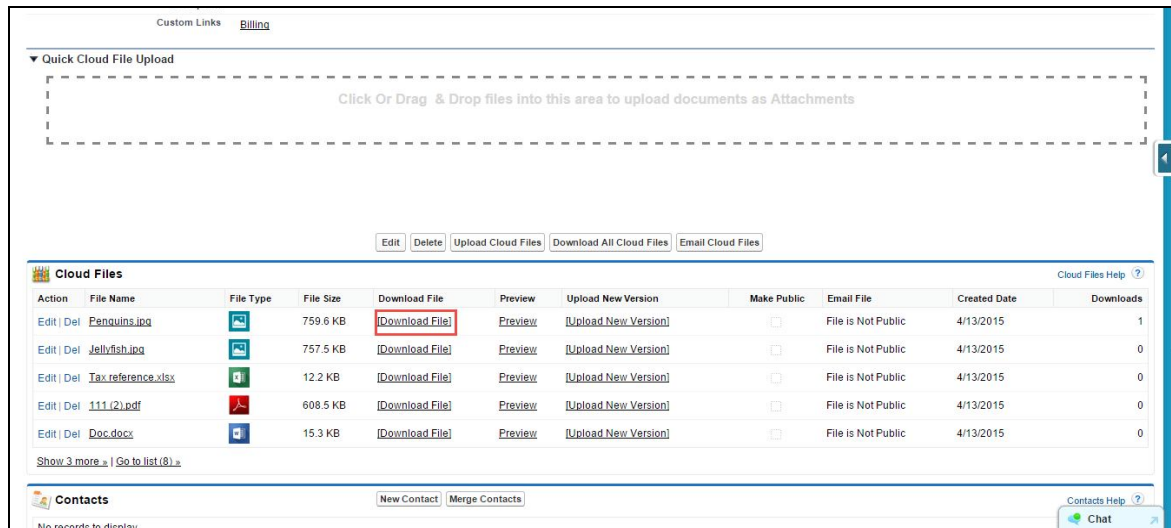
The Document is uploaded as a Salesforce File.



Download

Single File

You can download a single file by clicking **Download File**.

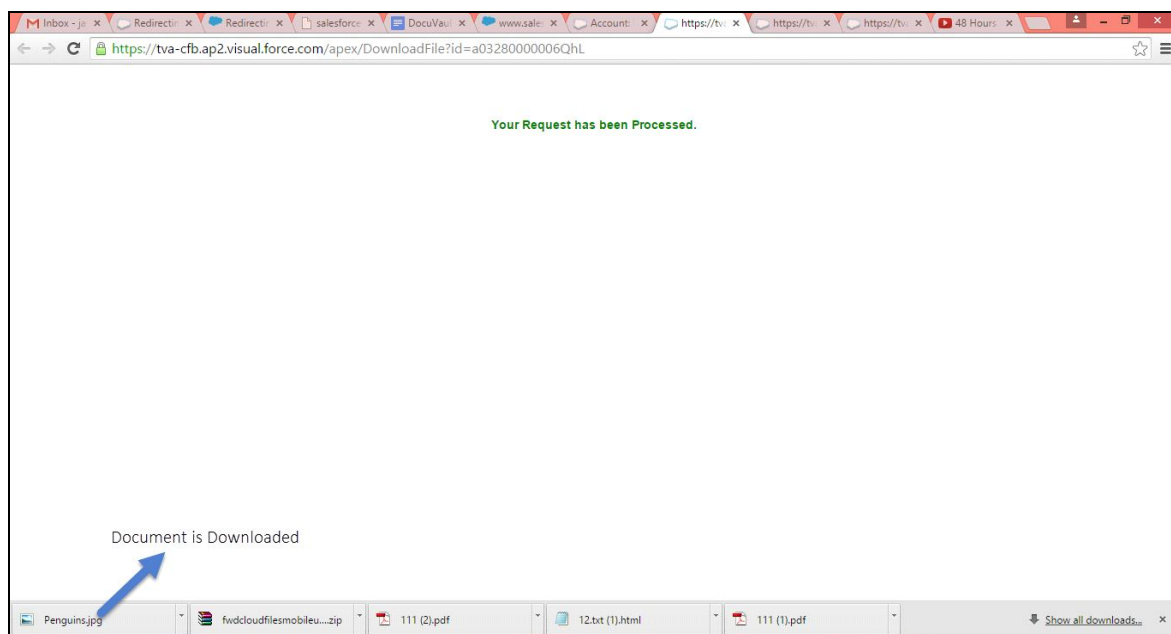


The screenshot shows the Salesforce Cloud Files interface. At the top, there are tabs for 'Custom Links' and 'Billing'. Below this is a 'Quick Cloud File Upload' section with a dashed box for dragging files. A toolbar contains buttons for 'Edit', 'Delete', 'Upload Cloud Files', 'Download All Cloud Files', and 'Email Cloud Files'. The main section is titled 'Cloud Files' and contains a table of files. The 'Download File' button for the first file, 'Penguins.jpg', is highlighted with a red box.

Action	File Name	File Type	File Size	Download File	Preview	Upload New Version	Make Public	Email File	Created Date	Downloads
Edit Del	Penguins.jpg		759.6 KB	Download File	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	1
Edit Del	Jellyfish.jpg		757.5 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	0
Edit Del	Tax reference.xlsx		12.2 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	0
Edit Del	111 (2).pdf		608.5 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	0
Edit Del	Doc.docx		15.3 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	0

Below the table, there is a 'Show 3 more' link and a 'Go to list (8)' link. At the bottom, there is a 'Contacts' section with 'New Contact' and 'Merge Contacts' buttons, and a 'Chat' button.

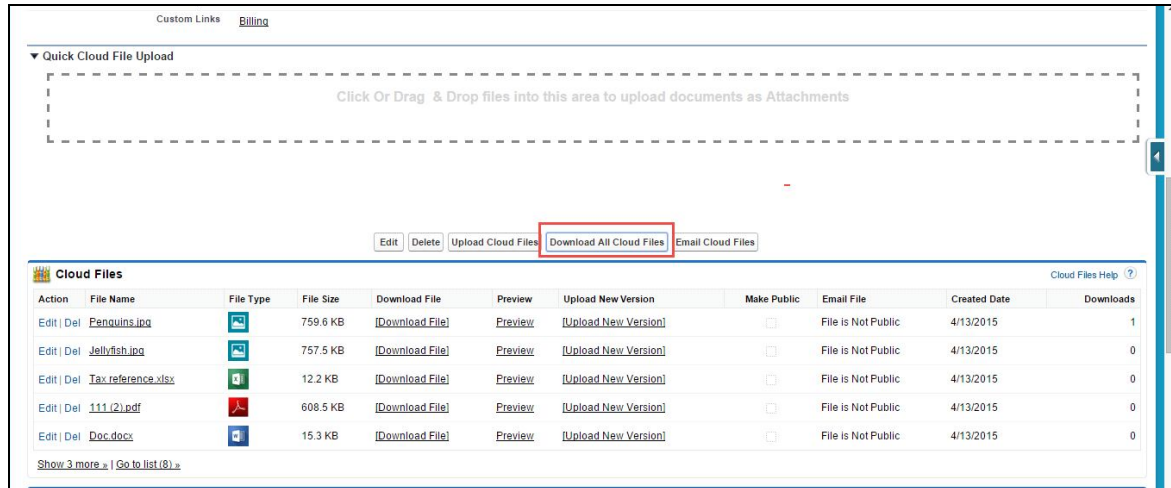
The file will be downloaded on your system.



The screenshot shows a web browser window with the URL <https://tva-cfb.ap2.visual.force.com/apex/DownloadFile?id=a032800000006QhL>. The main content area displays the message 'Your Request has been Processed.' in green. Below this, a blue arrow points to the text 'Document is Downloaded'. At the bottom, a download bar shows a list of files: 'Penguins.jpg', 'fwdcloudfilesmobileu...zip', '111 (2).pdf', '12.txt (1).html', and '111 (1).pdf'. A 'Show all downloads' link is also visible.

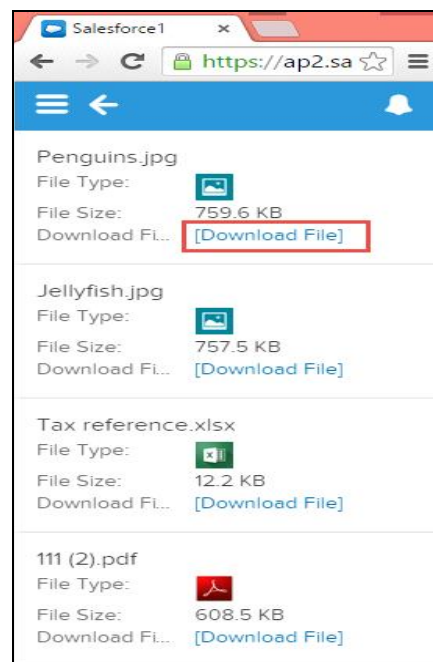
All Files

You can download all the files by clicking **Download All Files** and all the files get downloaded in one go.



Salesforce 1 Download

In order to download the files on salesforce1, you need to switch to Related tab on an object and select **Cloud Files** folder.



- Click **Download File** to download the file.

Delete

Delete option enables you to delete documents uploaded onto the application. You can delete a document by clicking **Del** option next to each document.

Created By [Srikanth Valluri](#), 4/13/2015 2:28 AM

Last Modified By [Srikanth Valluri](#), 4/13/2015 2:28 AM

Description

Custom Links [Billing](#)

▼ Quick Cloud File Upload

Click Or Drag & Drop files into this area to upload documents as Attachments

EditDeleteUpload Cloud FilesDownload All Cloud FilesEmail Cloud Files

Cloud Files

Cloud Files Help ?

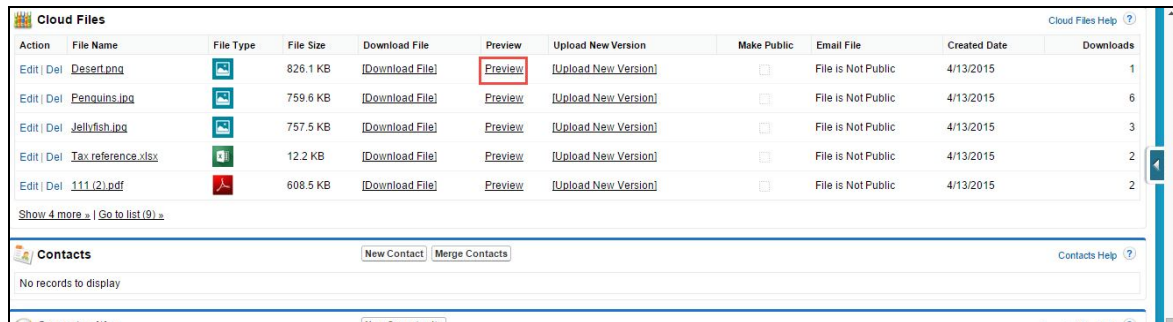
Action	File Name	File Type	File Size	Download File	Preview	Upload New Version	Make Public	Email File	Created Date	Downloads
Edit Del	Desert.png		826.1 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	1
Edit Del	Penguins.jpg		759.6 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	6
Edit Del	Jellyfish.jpg		757.5 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	3
Edit Del	Tax reference.xlsx		12.2 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	2
Edit Del	111 (2).pdf		608.5 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	2

Show 4 more » | Go to list (0) »

Preview

Preview option provides a look of the document you have uploaded onto the application.

You can preview file by clicking **Preview** option.



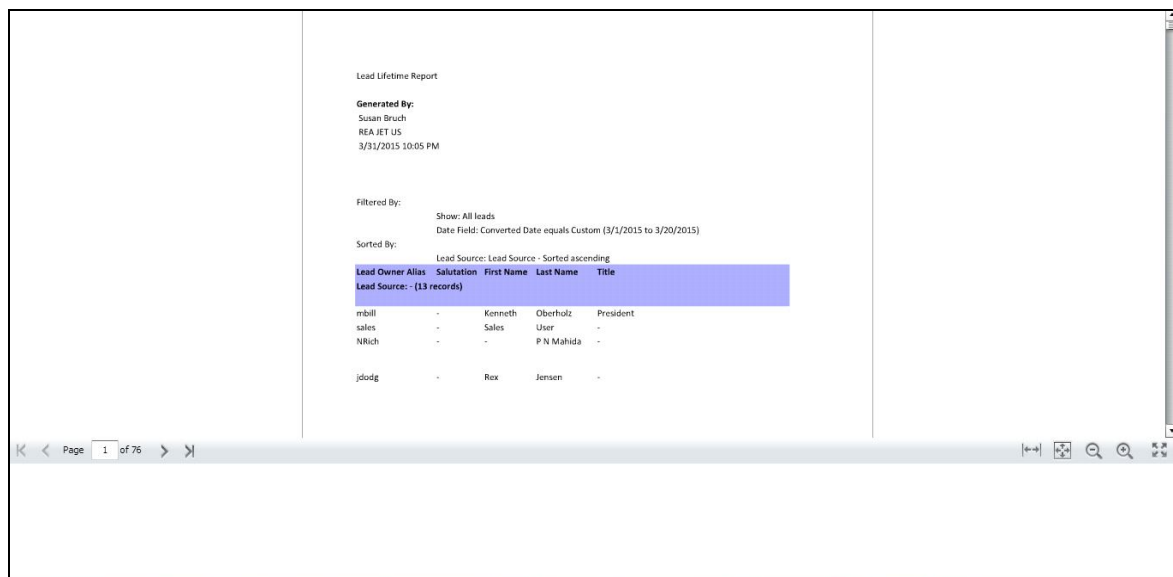
Action	File Name	File Type	File Size	Download File	Preview	Upload New Version	Make Public	Email File	Created Date	Downloads
Edit Del	Desert.png		826.1 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	1
Edit Del	Penguins.jpg		759.6 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	6
Edit Del	Jellyfish.jpg		757.5 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	3
Edit Del	Tax reference.xlsx		12.2 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	2
Edit Del	111 (2).pdf		608.5 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	2

[Show 4 more »](#) | [Go to list \(9\) »](#)

Contacts [New Contact](#) [Merge Contacts](#) [Contacts Help](#)

No records to display

The selected file preview will open in another tab.



Lead Lifetime Report

Generated By:
Susan Bruch
REA JET US
3/31/2015 10:05 PM

Filtered By: Show: All leads
Date Field: Converted Date equals Custom (3/1/2015 to 3/20/2015)

Sorted By: Lead Source: Lead Source - Sorted ascending

Lead Owner Alias	Salutation	First Name	Last Name	Title
Lead Source: - (13 records)				
mbill	-	Kenneth	Oberholz	President
sales	-	Sales	User	-
NRich	-	-	P N Mahida	-
jdodg	-	Rex	Jensen	-

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File Versioning

DocuVault has the capability to track revisions of documents for all the cloud files. It reduces duplication and extra effort required for the existing documents. This feature allows you to view different versions of a file uploaded with the same name. The files with same name are saved as latest versions.

- Click **Upload New Version** to upload a new version of the existing file.

A new Version of a file can be uploaded in 2 ways:

■ From Cloud Files List view

Action	File Name ↑	File Type	File Size	Download File	Preview	Upload New Version	Make Public	Email File	Created Date	Downloads
Edit Del	111_121.pdf		608.5 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	2
Edit Del	Awning Above Test Scripts.doc		3 MB	[Download File]	No Preview Available	[Upload New Version]	☐	File is Not Public	4/13/2015	2
Edit Del	Awning Quote Sample.pdf		84.8 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	2
Edit Del	BP_SalesManagers.pdf		2.1 MB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	2
Edit Del	Desert- Copy.png		826.1 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	0
Edit Del	Desert.png		826.1 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	1
Edit Del	Desert.png		826.1 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	0
Edit Del	Doc.docx		15.3 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	2
Edit Del	Hydrangeas.jpg		581.3 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	0
Edit Del	Jellyfish.jpg		757.5 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	3
Edit Del	Jellyfish.jpg		757.5 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	0
Edit Del	Penguins.jpg		759.6 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	6
Edit Del	Tax reference.xlsx		12.2 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	2
Edit Del	Tulips.jpg		606.3 KB	[Download File]	Preview	[Upload New Version]	☐	File is Not Public	4/13/2015	0

Show me fewer ▲ records per list page

- Go to Cloud Files List View page.
- Select the file, and click **Upload New Version**.

■ From Cloud File Detail Page

The screenshot shows the 'Cloud Files Detail' page for a file named 'Tax reference.xlsx'. The page includes a header with the DocuVault logo and navigation tabs. Below the file name, there are buttons for 'Post', 'File', 'Link', and 'More'. A 'Share' button is also visible. The 'Cloud Files Detail' section displays various file attributes: File Name (Tax reference.xlsx), File Size (12.2 KB), File Type (xlsx), Version (1), Download File (with a link), Public Short URL, Public Access URL, Downloads (2), and Previews (0). On the right side, there are buttons for 'Edit', 'Delete', 'Preview', 'Upload New Version' (highlighted with a red box), 'Email Document', 'Make Public URL', 'Publish File To Chatter', 'Upload As Salesforce File', and 'Google URL Analytics'. The 'Upload New Version' button is the primary action for updating the file.

- Go to Cloud File Detail Page.
- Select the file, and click **Upload New Version**.

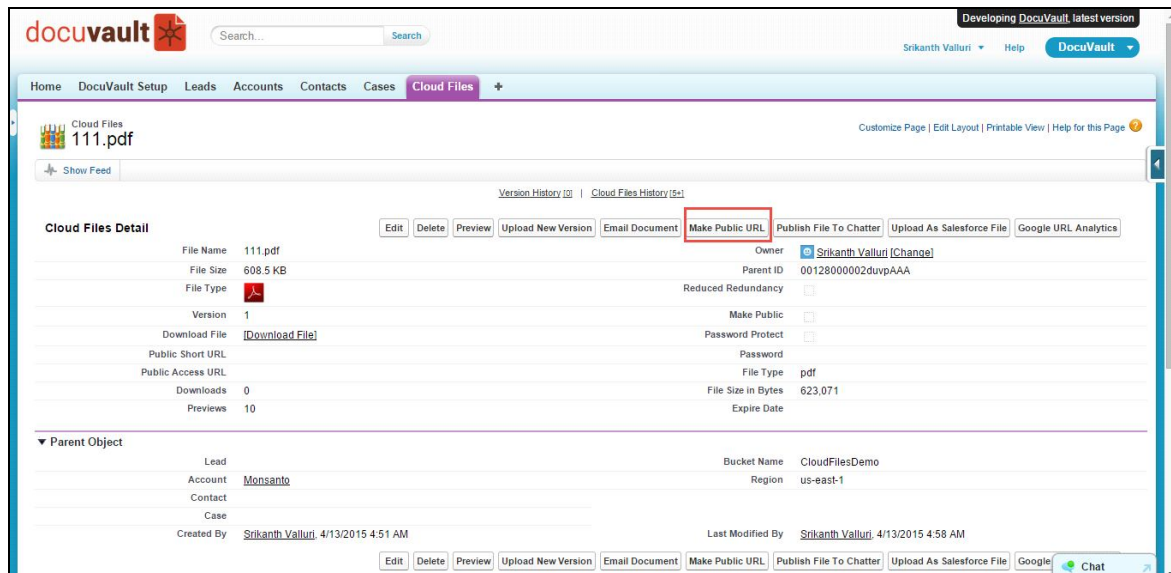
Note: Versioning of the Bucket must be enabled in order to upload a new version of the file.

Warning: Only files of similar type can be uploaded; else an error will be displayed: “File Type not matched”.

- If a new file is uploaded, the previous version of that file gets listed under Version History Section and new version of the file is displayed.
- On enabling ‘Reduced Redundancy’ same file is generated with lesser file storage space.
- If versioning is enabled a new version of that file is created in Amazon S3.

Generate Public Links

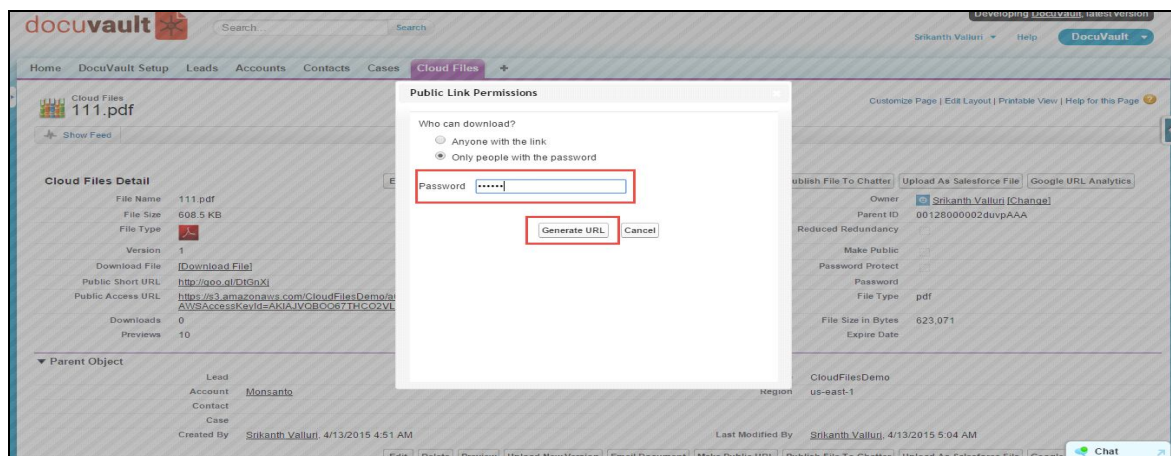
DocuVault facilitates an option to create public links to share files among public or groups. You can select to share the link with anyone or only people with password.



- Click **Make Public URL** on the Cloud File.

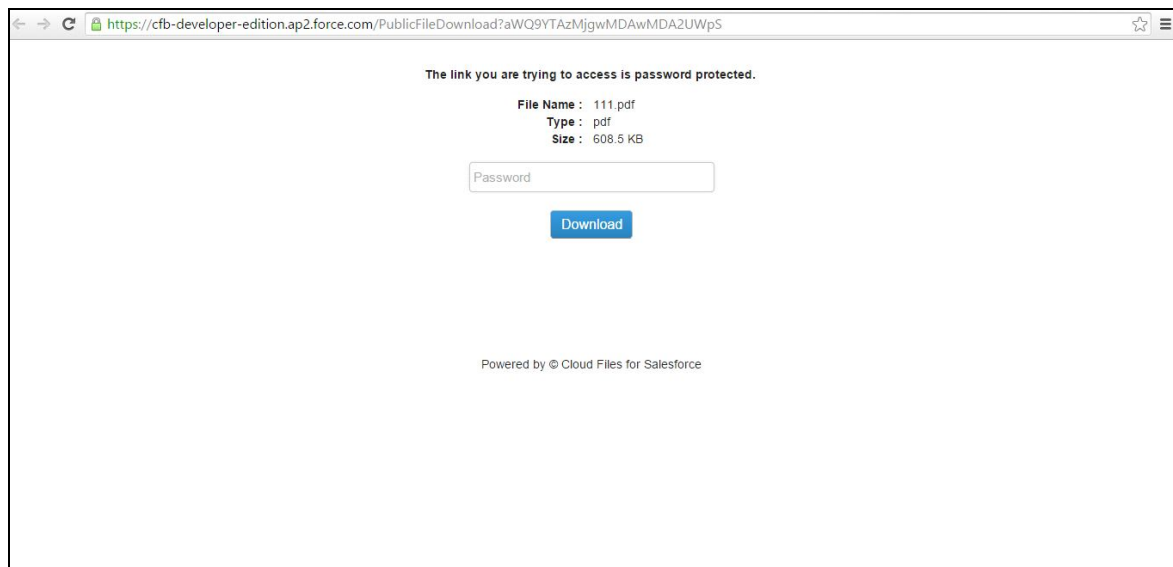
Password Protected Links

Here, you can set passwords for the links in order to access them. So, the people with password can only gain access to these links.



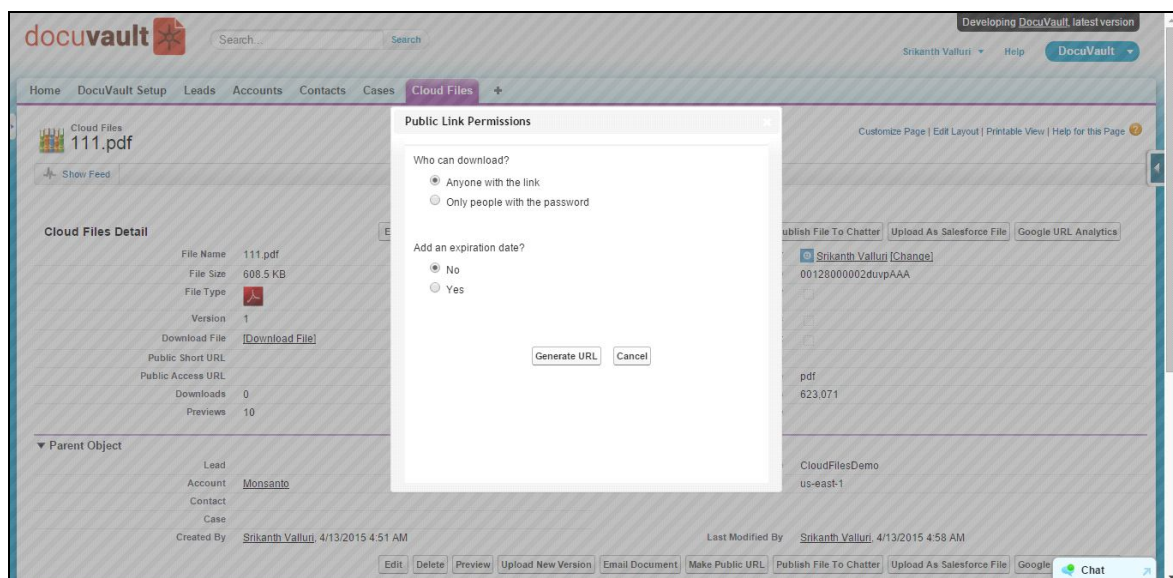
- For Password Protected Link, select the option button next to **Only People with the Password**.
- Enter the password and click **Generate URL**.

When the file is password protected, the user would be asked to enter password in order to view the file.



Public Link

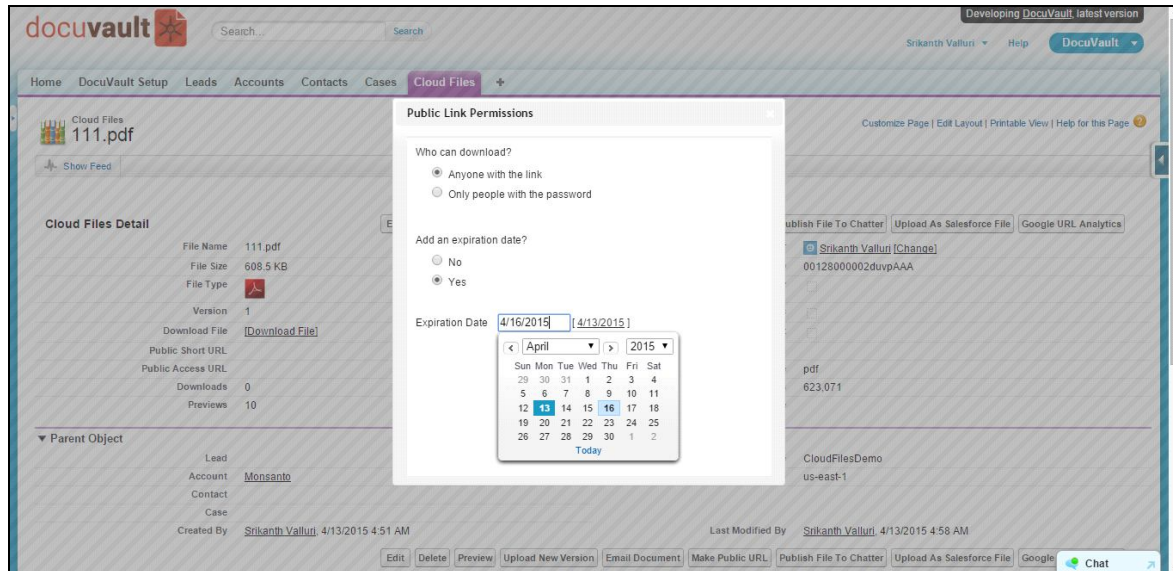
The public link option enables complete access to the documents you want to share to the group.



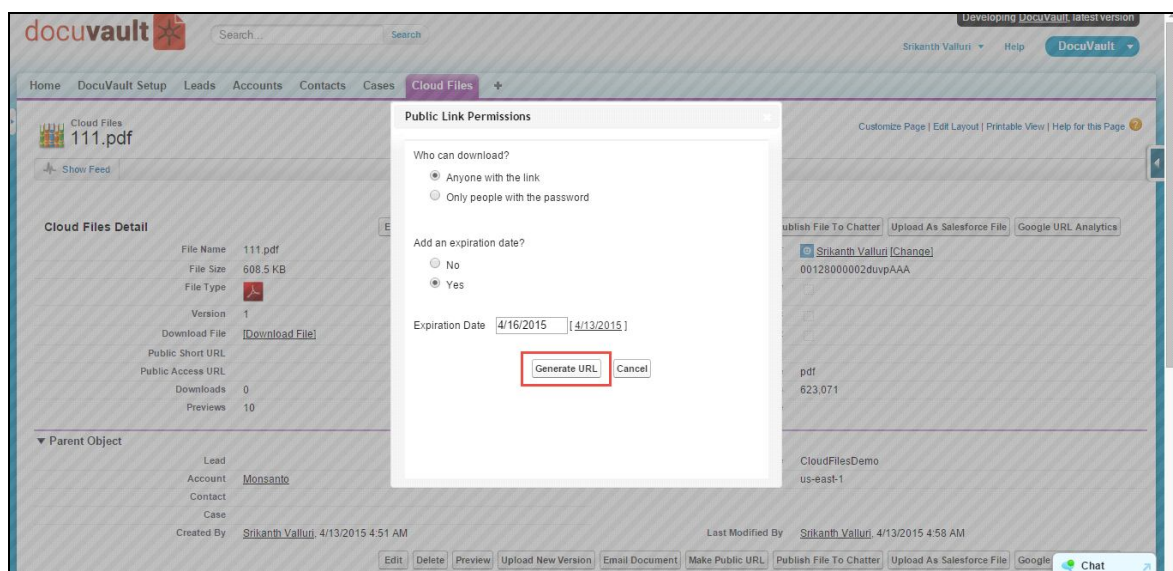
- Select **Anyone with the Link** if you would like to make the document public.

Public Link with Expiration Date

Here is an option to set expiration for the documents you wish to share among the group. This enables in providing temporary access to the documents you would like to share.



- To add an expiration date to your Link, select **Yes** in Add an Expiration Date section.



- Enter a date and click **Generate URL**.

A URL is generated and displayed in the field Public Access URL. You can paste this URL in an email to provide access to other users.

A short URL is generated if Google Short URL is added under Cloud Setup Tab.

The screenshot displays the DocuVault web application interface. At the top, there's a navigation bar with tabs: Home, DocuVault Setup, Leads, Accounts, Contacts, Cases, and Cloud Files (which is active). A search bar is located next to the DocuVault logo. Below the navigation bar, the main content area shows the details for a file named '111.pdf'. The file is a PDF, 608.5 KB in size, and has a version of 1. The 'Public Short URL' is highlighted with a red box and is 'http://goo.gl/DtGnXi'. The 'Public Access URL' is also highlighted with a red box and is 'https://s3.amazonaws.com/CloudFilesDemo/032800000006QIR.pdf?AWSAccessKeyId=AKIAJVOROO67THCOZVL&Signature=b2T4UJaiEaRQYJ8LvMqulqVhZl%3D&Expires=1429228800'. The 'Parent Object' section shows the file is associated with the 'Monsanto' account, created by 'Srikanth Valluri' on 4/13/2015 at 4:51 AM. The interface includes various action buttons like 'Edit', 'Delete', 'Preview', 'Upload New Version', 'Email Document', 'Make Public URL', 'Publish File To Chatter', 'Upload As Salesforce File', and 'Google URL Analytics'. A 'Chat' button is visible in the bottom right corner.

DocuVault

Search...

Developing DocuVault: latest version

Srikanth Valluri Help DocuVault

Home DocuVault Setup Leads Accounts Contacts Cases Cloud Files +

Cloud Files 111.pdf Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Version History | Cloud Files History

Cloud Files Detail

Edit Delete Preview Upload New Version Email Document Make Public URL Publish File To Chatter Upload As Salesforce File Google URL Analytics

File Name 111.pdf Owner Srikanth Valluri [Change]

File Size 608.5 KB Parent ID 00128000002duvpAAA

File Type PDF Reduced Redundancy

Version 1 Make Public

Download File [Download File] Password Protect

Public Short URL http://goo.gl/DtGnXi Password

Public Access URL https://s3.amazonaws.com/CloudFilesDemo/032800000006QIR.pdf?AWSAccessKeyId=AKIAJVOROO67THCOZVL&Signature=b2T4UJaiEaRQYJ8LvMqulqVhZl%3D&Expires=1429228800 File Type pdf

Downloads 0 File Size in Bytes 623,071

Previews 10 Expire Date

Parent Object

Lead Bucket Name CloudFilesDemo

Account Monsanto Region us-east-1

Contact

Case

Created By Srikanth Valluri, 4/13/2015 4:51 AM Last Modified By Srikanth Valluri, 4/13/2015 5:04 AM

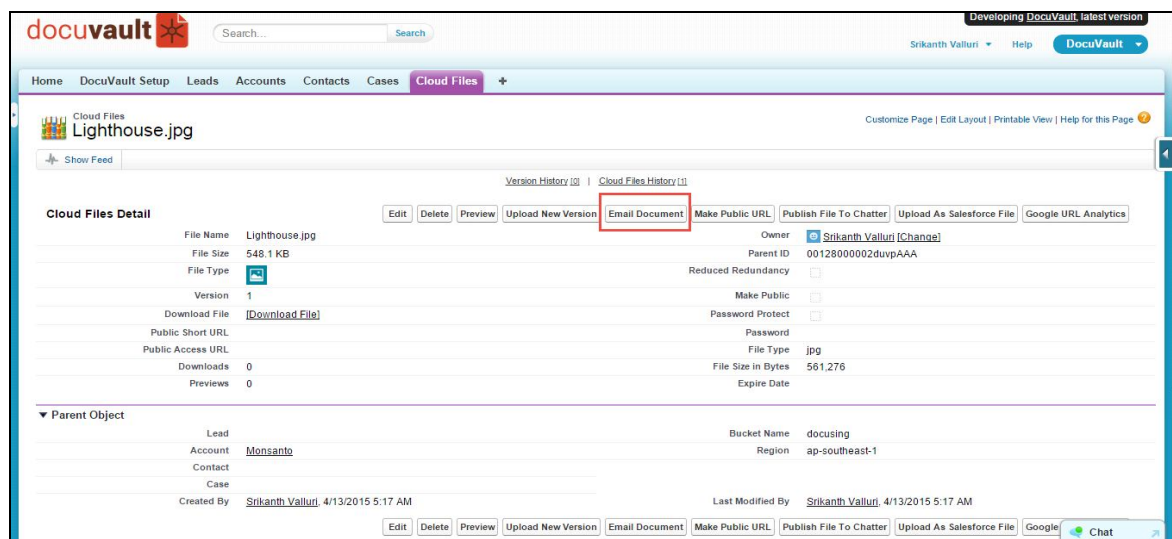
Edit Delete Preview Upload New Version Email Document Make Public URL Publish File To Chatter Upload As Salesforce File Google Chat

Share Files

DocuVault supports a feature of sharing updated versions of the documents among the people or groups. The updated documents can be viewed only by the people it is shared with.

Email

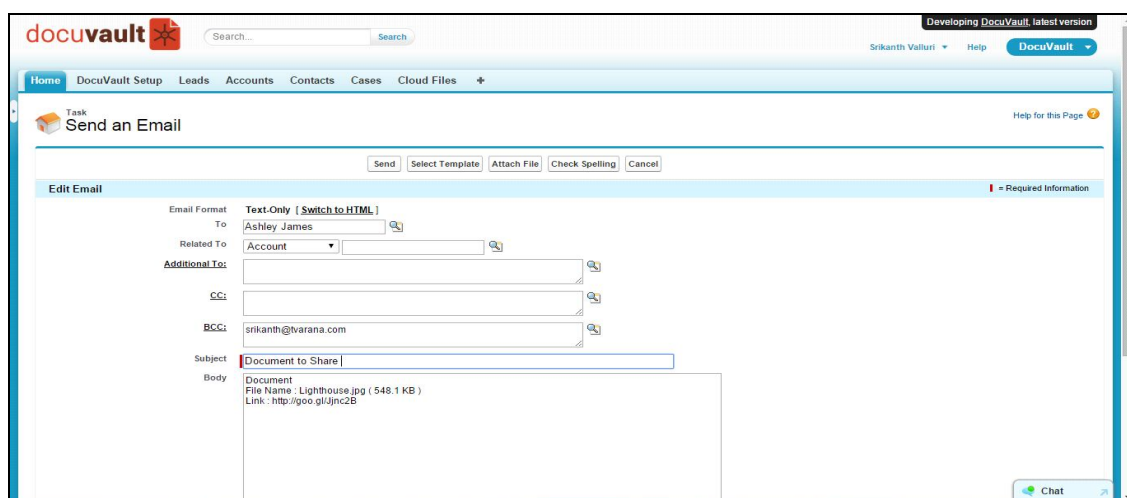
This option enables you to Email the files to people or groups.



- Click **Email Document**.

Note: URLs must be made Public before sharing.

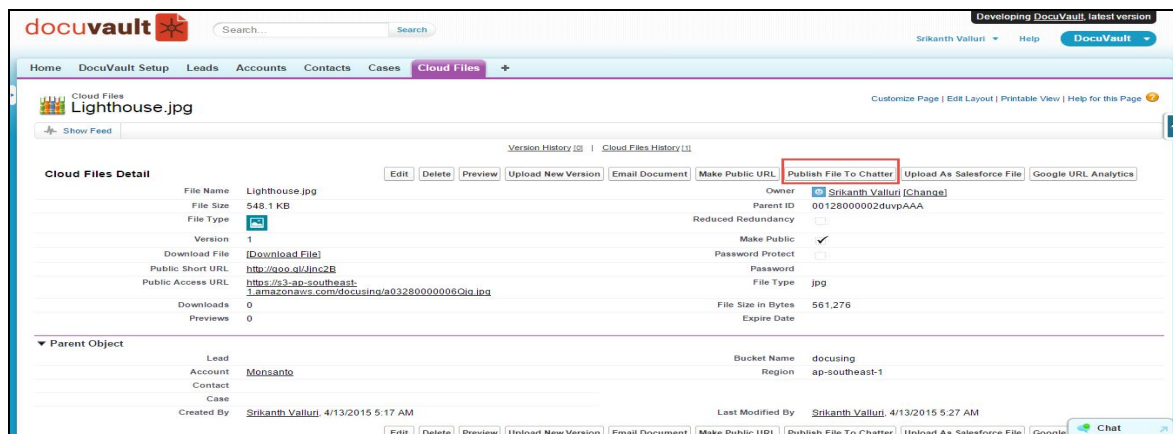
You will be directed to Send an Email page displaying file details and Short URL populated in Body of the email.



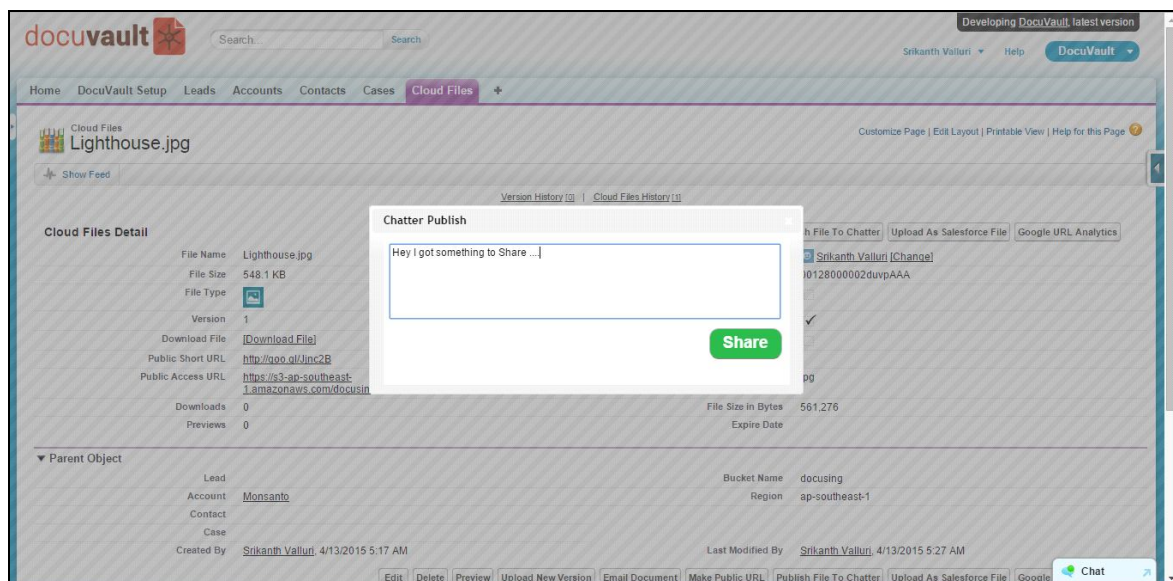
- Enter the details of To, CC, BCC and Subject.
- Click **Send**.

Chatter

Publishing the files or documents on Chatter enables you to collaborate with other groups easily.

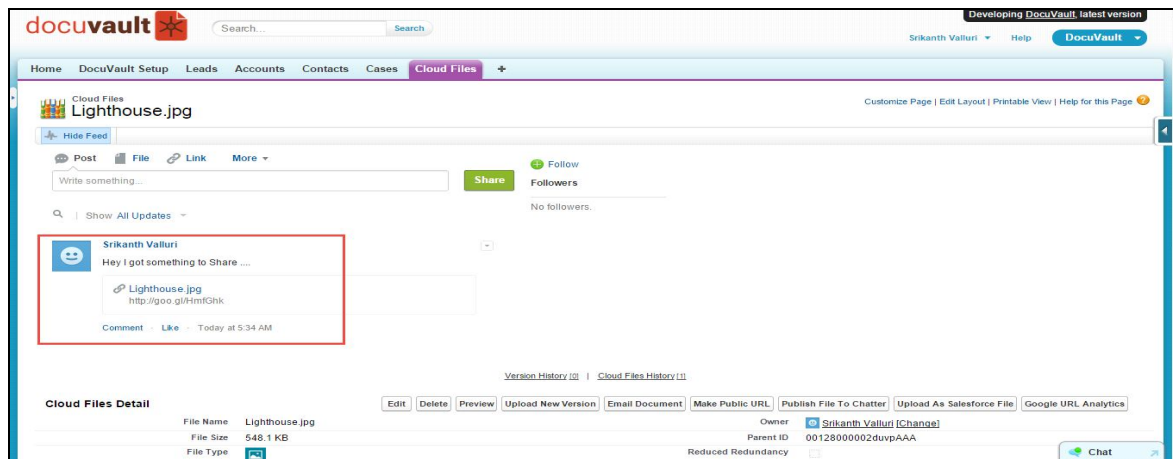


- Click **Publish File to Chatter** to publish the file on Chatter.



- Enter the message and click **Share**.

The file is shared on Chatter with the message.



Note: DocuVault supports the Standard Chatter Preview Functionality. Also, you can view file size up to 3 MB.

Short URL and Analytics

Regular lengthy links may be aesthetically unpleasing. Many web developers pass descriptive attributes in the URL to represent data hierarchies, command structures, transaction paths or session information. This can result in URLs that are hundreds of characters long and that contain complex character patterns. Thus, short URLs may be more convenient to be shared in an email or Chatter.

Google analytics provides statistics and analytical tools for marketing purposes. Its major features include the charts and statistical information that display changes in the data over time. The feature in this application enables you to gauge the count and the location of the users visited the link over time.

- Go to a Cloud File Detail page and click **Google URL Analytics**.
- A new tab is opened with the Google Short URL.
- Also, you could view stats like number of clicks on the File Link (Google Short URL), number of visits over a period of time, country from where you are getting the number of clicks. These stats can help you to understand whether your file is resonating with your visitors and make appropriate changes.

The screenshot shows the 'Cloud Files Detail' page for a file named 'BP_SalesManagers.pdf'. The page includes a header with file name, size (2.1 MB), and type (pdf). Below this, there are several action buttons: Edit, Delete, Preview, Upload New Version, Email Document, Make Public URL, Publish File To Chatter, Upload As Salesforce File, and Google URL Analytics. The 'Google URL Analytics' button is highlighted with a red rectangle. The page also displays a 'Public Short URL' and a 'Public Access URL'.

Cloud Files Detail	
File Name	BP_SalesManagers.pdf
File Size	2.1 MB
File Type	pdf
Version	1
Download File	[Download File]
Public Short URL	http://goo.gl/im5MZ
Public Access URL	https://s3-ap-southeast-1.amazonaws.com/docusign/a03280000006Rhz.pdf
Downloads	0
Previews	0
Owner	Srikanth Valluri [Change]
Parent ID	000280000010RdTEAU
Reduced Redundancy	☐
Make Public	☒
Password Protect	☐
Password	
File Type	pdf
File Size in Bytes	2,235,150
Expire Date	

