



Fleekdrive

Installation Guide

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4th Edition
Fleekdrive Co., Ltd.

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1. Introduction

Thank you for using Fleekdrive. Fleekdrive supports Files management, report generation management, and information disclosure protection.

It provides one-stop features for PDF list creation, bulk file distribution, Version Control Setting and access control of Files, sharing and collaboration, and trail management. Moreover, it is possible to deal with Files with PC with Cloud by information leakage prevention function to deal with personal information and confidential information safely on Cloud by automatic encryption and taking out prohibition control of the file from PC.

This manual is a guide for installation, configuration and operation of Fleekdrive. Refer to appendix and Fleekdrive User Guide for the instructions of Fleekdrive.

2. Installation

2.1. Installation

1. Open the AppExchange English website and search for “Fleekdrive” and install.
2. Press the “ Login to the AppExchange” button.

Log In to AppExchange

To continue, log in with your Salesforce credentials.

Log In

By submitting this request, you agree to share your information with Salesforce and the provider of this listing, SOLXYZ Co., Ltd..

Listing: Fleekdrive

Don't have a Salesforce account?

Continue as Guest

Cancel

3. When Login Page is loaded, login with user account that has an authority of “System Administrator” System Authority of Salesforce organization.

salesforce

Username

Password

Log in to Salesforce

☐ Remember Username

[Forgot your password?](#) | [Sign up for free.](#)

[Log in to a custom domain.](#)

salesforce

NOW YOU CAN RUN YOUR BUSINESS FROM YOUR PHONE.

Explore the app >

Need Help?

If you need immediate help, you can call 1800 667 638 or +61 2 9394 7300.

Contact Us

4. Select Salesforce organization information you are going to install.

Where do you want to install this package?

Before you install in a production org, we suggest testing in a sandbox.

Install in a Production Environment

Install where you or your users work, including developer orgs.

Install in Production

Install in a Sandbox

Test in a copy of a production org.

Install in Sandbox

Cancel

5. Read the terms and conditions and tick the checkbox, if you agree with it. Then press the “Confirm and Install” button to start the installation.

Confirm Installation Details

Package	Version
Fleekdrive/Fleekform (V1.2.1 / 6.57.1)	V1.2.1 / 6.57.1
Subscription	Organization
Free Trial	株式会社ソルクシーズ
Duration	Number of Subscribers
30 Days	Site-wide
Username	
yosuwa@180719.com	

☒ I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

[Cancel](#) [Confirm and Install](#)

6. Detailed screen of installed package displayed. Choose the “Install for Specific Profiles...”, and unselect the user’s access authority that are not planned to use. However, as you cannot select the user which doesn’t have authorities(to be set later) there is no problem if you give full-access authorities to all users profile.

⚠ At this step, if you choose “ Install for Admins Only” which is a default setting, and your System Authority is not for system administrator, you may not be able to use Fleekdrive unless you set it manually.

**Install Fleekdrive**
By SOLXYZ Co., Ltd.


☐ Install for Admins Only


☐ Install for All Users


☒ Install for Specific Profiles...

Install

Cancel

Select Specific Profiles

These security settings determine access to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.



Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone your profile to grant access.

Set access level for all profiles to

Full Access

Set

Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
Standard Platform User	No Access

7. Third Party Access recognition screen will be displayed. Verify the Files. Tick the approval checkbox Check and press “Continue” button to continue with the installation.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
api.fleekform.com	☒
appsf.fleekdrive.com	☒
ecm.cloudsharedoffice.com	☒
ecmpresf.cloudsharedoffice.com	☒
ecmsf.cloudsharedoffice.com	☒
webto.salesforce.com	☒
wrapi.cloudsharedoffice.com	☒
wrregister.cloudsharedoffice.com	☒
www.salesforce.com	☒



Yes, grant access to these third-party web sites

Continue

Cancel

8. The screen below will be displayed in a couple of minutes after “Install” button is clicked.

**Install Fleekdrive**
By SOLXYZ Co., Ltd.

 **Installing and granting access to all Users...**

App Name	Publisher	Version Name	Version Number
Fleekdrive	SOLXYZ Co., Ltd.	V1.2.1	6.57.1

Description

Fleekdrive is a file collaboration service that links your operations and files on Salesforce, which is adopted by more than 100 companies across 190 countries around the world.

Additional Details [View Components](#)

It takes around 8-10 minutes to complete the installation.

Users will receive a notification e-mail after the installation is completed.

Title: "Package "Fleekdrive/Fleekform" Install Successful"

Although the screen still "Processing", installation is completed after you received the

mail.

9. Verify “Installed Packages” after the message received.

Menu: Setup>App Setup>Installed Packages.

Leads Accounts Contacts Opportunities Reports Dashboards Products Forecasts +

Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#).

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date
Uninstall	CloudSharedOffice	株式会社ソ ルクシース	2.0.7	SOLXYZCS001	Trial	Unlimited	0	3/9/2013	2/7/2013 8:19 PM

Description

- Salesforce帳票のPDF生成/配信/履歴管理
- セールス業務帳票の作成や管理等の手間と時間を削減します。
- Salesforce連携セキュリティECM
- クラウドのコンテンツをセキュア(暗号化、持ち出し禁止等)にライフサイクル管理します。

Data from Uninstalled Packages

No uninstalled package data archives

Help & Training Sales

- Service
- Marketing
- Community
- Content
- Salesforce Chatter
- Site.com
- Fleekdrive**
- Fleekform**

10. “Fleekdrive” and “Fleekform” are added to “Force.com Application Menu”.

3. Preparation Before Use

This chapter explains necessary initial configuration of installed Fleekdrive.

3.1. Change The Layout Assignment of User Information

Open Salesforce Profiles list screen by selecting the following in the menu.

Setup>Administration Setup>Manage Users >Profiles

1. Select one of the profile to be configured for the user such as a Standard User.

User Profiles

[Help for this Page](#) ?

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Profile New			
Action	Name	User License	Custom
Edit	Chatter External User	Chatter External	☐
Edit	Chatter Free User	Chatter Free	☐
Edit	Chatter Moderator User	Chatter Free	☐
Edit	Chatter Only User	Chatter Only	☐
Edit	Content Only User	Content Only	☐
Edit	Contract Manager	Salesforce	☐
Edit	Customer Portal Manager	Customer Portal Manager	☐
Edit	Customer Portal Manager Custom	Customer Portal Manager Custom	☐
Edit	Customer Portal Manager Standard	Customer Portal Manager Standard	☐
Edit	Customer Portal User	Customer Portal User	☐
Edit	Force.com - One App User	Force.com - One App	☐
Edit	Gold Partner User	Gold Partner	☐
Edit	High Volume Customer Portal User	High Volume Customer Portal	☐
Edit	Knowledge Only User	Knowledge Only	☐
Edit	Marketing User	Salesforce	☐
Edit	Read Only	Salesforce	☐
Edit	Siteforce Only User	Siteforce Only	☐
Edit	Solution Manager	Salesforce	☐
Edit	Standard Platform User	Salesforce Platform	☐
Edit	Standard User	Salesforce	☐
Edit	System Administrator	Salesforce	☐

2. Click "View Assignment" under User Layout of Standard Object Layout field in Page Layout.

Profile Help for this Page ?

Standard User

[« Back to List: Installed Package](#)

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 information.

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 to users with this profile.

[Login IP Ranges \(0\)](#) |
 [Enabled Apex Class Access \(28\)](#) |
 [Enabled Visualforce Page Access \(215\)](#) |
 [Enabled External Data Source Access \(0\)](#)

Profile Detail
[Edit](#) [Clone](#) [View Users](#)

Name	Standard User		
User License	Salesforce	Custom Profile	☐
Created By	森澤 藤田, 8/2/2012 1:58 PM	Modified By	Hiroko Yamabe, 2/7/2013 8:19 PM

Console Settings

Console Layout [\[Edit\]](#)

Page Layouts

Standard Object Layouts

Home Page Layout	Dashboard Home Page Default [View Assignment]	Event	Event Layout [View Assignment]
Account	Account Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Campaign	Campaign Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Campaign Member	Campaign Member Page Layout [View Assignment]	Product	Product Layout [View Assignment]
Case	Case Layout [View Assignment]	Solution	Solution Layout [View Assignment]
Case Close	Close Case Layout [View Assignment]	Task	Task Layout [View Assignment]
Contact	Contact Layout [View Assignment]	User	User Layout [View Assignment]
Contract	Contract Layout [View Assignment]		

Custom Object Layouts

- Click “Edit Assignment” button.

Page Layout Assignment Help for this Page ?

User

The table below shows the page layout assignments for different profiles.

[Edit Assignment](#)

Profiles	Page Layout
Chatter Only User	User Layout
Content Only User	User Layout
Contract Manager	User Layout
Customer Portal Manager	User Layout
Customer Portal Manager Custom	User Layout
Customer Portal Manager Standard	User Layout
Customer Portal User	User Layout
Force.com - One App User	User Layout
Gold Partner User	User Layout
High Volume Customer Portal User	User Layout
Knowledge Only User	User Layout
Marketing User	User Layout
Read Only	User Layout
Siteforce Only User	User Layout
Solution Manager	User Layout
Standard Platform User	User Layout
Standard User	User Layout
System Administrator	User Layout

[Edit Assignment](#)

- Choose all possible profile to use Fleekdrive, select “User Layout CSO” for Page Layout in use.

* There is no restriction depending on Salesforce user license type.

It is possible to choose either some profiles only, or all profiles like below.

Edit Page Layout Assignment Help for this Page ?

User

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

2 Page Layout To Use: -- Select Page Layout -- 18 Selected 0 Changed

-- Select Page Layout --
User Layout

1 Select

Profiles	Page Layout
Chatter Only User	User Layout
Content Only User	User Layout
Contract Manager	User Layout
Customer Portal Manager	User Layout
Customer Portal Manager Custom	User Layout
Customer Portal Manager Standard	User Layout
Customer Portal User	User Layout
Force.com - One App User	User Layout
Gold Partner User	User Layout
High Volume Customer Portal User	User Layout
Knowledge Only User	User Layout
Marketing User	User Layout
Read Only	User Layout
Siteforce Only User	User Layout
Solution Manager	User Layout
Standard Platform User	User Layout
Standard User	User Layout
System Administrator	User Layout

Save Cancel

- Click “Save” after editing page layout assignment has done.

Edit Page Layout Assignment Help for this Page ?

User

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

Page Layout To Use: User Layout CSO 18 Selected 18 Changed

Profiles	Page Layout
Chatter Only User	User Layout CSO
Content Only User	User Layout CSO
Contract Manager	User Layout CSO
Customer Portal Manager	User Layout CSO
Customer Portal Manager Custom	User Layout CSO
Customer Portal Manager Standard	User Layout CSO
Customer Portal User	User Layout CSO
Force.com - One App User	User Layout CSO
Gold Partner User	User Layout CSO
High Volume Customer Portal User	User Layout CSO
Knowledge Only User	User Layout CSO
Marketing User	User Layout CSO
Read Only	User Layout CSO
Siteforce Only User	User Layout CSO
Solution Manager	User Layout CSO
Standard Platform User	User Layout CSO
Standard User	User Layout CSO
System Administrator	User Layout CSO

Save Cancel

- You will notice item configuration for Fleekdrive has been added, if you refer personal

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information from Setup>Administration Setup>Manage Users>Users List, or Setup>My Personal Information>Personal Information. All fields are blank as default.

User
suwa@en.com [Edit Layout](#) | [User Profile](#) | [Help for this Page](#) 

[Permission Set Assignments](#)  | [Permission Set License Assignments](#)  | [Personal Groups](#)  | [Public Group Membership](#)  | [Queue Membership](#)  | [Team](#)  | [Managers in the Role Hierarchy](#)  | [OAuth Connected Apps](#)  | [Third-Party Account Links](#)  | [Installed Mobile Apps](#)  | [Authentication Settings for External Systems](#)  | [Login History](#)  | [User Provisioning Accounts](#) 

User Detail

[Edit](#) [Sharing](#) [Change Password](#)

Name	suwa@en.com	Role	
Alias	suwa@	User License	Salesforce
Email	vosuwa@solxyz.co.jp	Profile	System Administrator
Username		Active	☒
Nickname	suwa1.4846564583509773E12 	Marketing User	☐
Title		Offline User	☐
Company		Force.com Flow User	☐
Department		Mobile Push Registrations	View
Division		Accessibility Mode (Classic Only)	☐ 
Address		Color-Blind Palette on Charts	☐ 
Time Zone	(GMT+09:00) Japan Standard Time (Asia/Tokyo)	Send Apex Warning Emails	☐
Locale	Japanese (Japan)	Salesforce1 User	☒ 
Language	English	Salesforce CRM Content User	☐
Delegated Approver		Receive Salesforce CRM Content Email Alerts	☒
Manager		Receive Salesforce CRM Content Alerts as Daily Digest	☒
Receive Approval Request Emails	Only if I am an approver	Make Setup My Default Landing Page	☐
Federation ID		Force.com Quick Access Menu	☒
App Registration: One-Time Password Generator	Connect 	Development Mode	☐
App Registration: Salesforce Authenticator	Connect 	Show View State in Development Mode	☐
Security Key (U2F)		Cache Diagnostics	☐
Lightning Login		Allow Forecasting	☐
Temporary Verification Code (Expires in 1 to 24 Hours)	Generate 	Call Center	
		Phone	
		Extension	
		Fax	
		Mobile	
		Email Encoding	Japanese (JIS)
		Employee Number	
		Start of day	6:00
		End of day	23:00
		Used Data Space	829 KB View
		Used File Space	55 KB View
		Last Login	2017/03/03 11:52
		Last Password Change or Reset	2017/01/18 18:10
Created By	加藤 csotest 2017/01/17 21:34	Modified By	suwa@en.com 2017/03/02 19:47

▼ Fleekdrive/Fleekform

Yomi(Last)	System Authority Name
Yomi(First)	Fleekdrive Active ☒
Birthday	Lock ☐
Fleekdrive Chatter ☐	Fleekdrive New User Interface ☒
Used Disk	Available Disk Space(GB)  -1
Used Delivery	Available Delivery Size(GB)  -1
Activate Disk Space Threshold ☐	Disk Space Threshold
Activate Delivery Size Threshold ☐	Disk Space Threshold Unit GB
	Delivery Size Threshold
	Delivery Size Threshold Unit GB
Activation Start Date	Activation End Date
Activation Start Time	Activation End Time
Fleekform Active ☒	Fleekform New User Interface ☒

Custom Link

[Fleekdrive System Authority](#)

[FleekdriveGroups](#)

[Edit](#) [Sharing](#) [Change Password](#)

3.2. Associated Fleekdrive Related List

If you associate Fleekdrive Files to Salesforce standard object, it necessary to change “Page Layout Assignment” of the Standard Object to “ECM Layout”.

Menu: Setup> App Setup> Customize > Leads > Page Layouts

Lead Page Layout

[Help for this Page](#) ?

This page allows you to create different page layouts to display Lead data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Lead Page Layouts				
		New	Page Layout Assignment	
Action	Page Layout Name	Installed Package	Created By	Modified By
Edit Del	Lead ECM Layout	CloudSharedOffice	Hiroko Yamabe, 2/7/2013 8:16 PM	Hiroko Yamabe, 2/7/2013 8:19 PM
Edit Del	Lead Layout		泰輝 藤田, 8/2/2012 1:58 PM	泰輝 藤田, 8/2/2012 1:58 PM

3.3. Translation Configuration

Japanese, English and Chinese (Simplified) are available in Fleekdrive.

Activate the translation setting by following steps, in order to display Fleekdrive menu in language specified in personal configuration of Salesforce.

1. Select Setup>Administration Setup>Translation Workbench>Translation Settings Menu.
Although English and Chinese (Simplified) are added as default setting, they are not activated yet (Unmark the check box).
2. In case the user configures to use English or Chinese (Simplified), Fleekdrive menu will remain displayed in Japanese as translation is not activated by default.
Activate the setting with following steps.

(1) Select “Edit” of “English”.

Translation Workbench

[Help for this Page](#) ?

Click Add to select the languages your organization supports and the users who are responsible for translating that language.

Supported Languages			
		Add	
Action	Language	Active	Translator(s)
Edit	English	☐	
Edit	Chinese (Simplified)	☐	

 The Translation Workbench is currently enabled for your organization. To disable it, click the Disable button. [Disable](#)

(2) Check “Activate” and save. The translators setting below is unnecessary.

Translation Workbench

Edit Language

[Help for this Page](#) ?

Add translators for this language to the Selected List box and click Save. After translations are completed, check Active to make translated values available to your users.

Language Translation Edit

Language

Language English

Active ☒

Identify Translators for this Language

To make users translators for this language, select them from the Available List and click Add. Make sure you give all translators the "View Setup and Configuration" permission so that they can begin translating.

Search Users

Available List

Austin Johnson
Brianna Smith
Christopher Williams
CustomProfile Yamabe
Emily Brown
Hannah Jones
Hiroko Yamabe
Jessica Miller
Kaitlyn Davis
Michael Willson

Selected List

--None--

Add

Remove

(3) Activate Chinese (Simplified) as well.

3. Activated languages are displayed like below.

If configured languages are one of Japanese, English, or Chinese (Simplified), it will be displayed in selected language.

If other language is specified, it will be displayed in English if English is activated.

Translation Workbench

[Help for this Page](#) ?

Click Add to select the languages your organization supports and the users who are responsible for translating that language.

Supported Languages

Action	Language	Active	Translator(s)
Edit	English	☒	
Edit	Japanese	☒	
Edit	Chinese (Simplified)	☒	

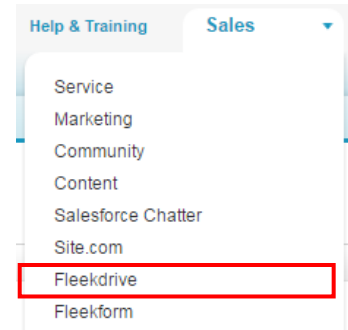
☒ The Translation Workbench is currently enabled for your organization. To disable it, click the Disable button.

4. Setting

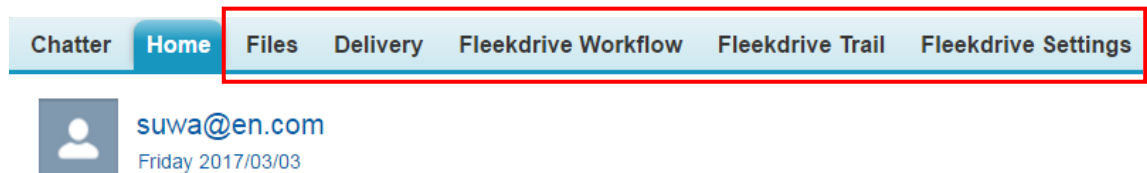
This chapter explains about steps of items that System Administrator of Salesforce has to configure before using the Fleekdrive.

4.1. Fleekdrive System Administrator Configuration

1. Go to Fleekdrive page with selecting "Fleekdrive" in the "Force.com App Menu" with confirming "Fleekdrive" and " Fleekform" are added.



2. Go to "Fleekdrive Settings" tab with choosing either " Files", " Delivery", "Fleekdrive Workflow", "Fleekdrive Trail", or "Fleekdrive Settings". The default setting for Fleekdrive will be launched.



4.1.1. Fill-in Trial User Information

1. The application page for "Free Trial for 30 days" will appear. Enter your information. You will find the link of " terms of use" in the page, please select the check mark if you agree with the terms of use. If you agree, click " Accept the usage of a personal information and confirm" button.



Cloud Shared Office

Free trial for 30 days

This page is for the "Free trial for 30 days." please fill out the form below and click confirmation button.

Organization Information	
Organization Name	CSO
Country	Japan
Postal	000-0000
State	tokyo
County, city	mitaku
Address	shiba
Phone	03-000-000
FAX	
Organization ID	00D10000000ZxVJ

Personal Information	
Last Name	kato
First Name	CSO
Department	
User ID	kkatou@86demo.com
Email Address	kkatou@solxyz.co.jp

Service	
Filter:	☐ Face ☐ Sync
Option	☐ PDF Security ☐ PDF Watermark

Other	
Requirements and problems.	
Introduction and consideration time	-Please select-

☒ please read the "terms of use" and check off the box if you accept our statements.
About the usage of your personal information we have.

Accept the usage of a personal inform

- Application has been completed.



Cloud Shared Office

Free trial for 30 days

Thank you for your trial.

Start

4.1.2. Reset-up using the security application

Please input the security token ,and click "Authentication". Please take note that it's different from the security token of Salesforce user.

Cloud Shared Office
 Initial setting wizard Certification of an initial user

Please ask us(csosupport@solxyz.co.jp) if you have trouble with security token.

Organization Name 86demo.com Authentication

Initial user

Please execute the confirmation of initial users.

User ID kkatou@86demo.com

Security Token

Authentication

5. Other Required Configuration before Using Fleekdrive

This chapter explains about required items to be configured by System Administrator of Salesforce in case of using Fleekdrive after the user creation of Fleekdrive is done.

5.1. Edit of User's Fleekdrive Configuration

Select, Setup>Administration Setup>Manage Users>User to show user list.

Active Users Help for this Page ?

View: Active Users Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

New User Reset Password(s) Add Multiple Users

☐	Action	Full Name ↑	Alias	Username	Last Login	Role	Profile
☐	Edit	Anderson, Nicholas	Anderson	officenv_009@62demo.com		NY Employee	Force.com - One App User
☐	Edit	Brown, Emily	Brown	officenv_004@62demo.com		NY Employee	Force.com - One App User
☐	Edit	Davis, Kaitlyn	Davis	officenv_007@62demo.com		NY Employee	Force.com - One App User

Refer user to check or edit items for Fleekdrive.

Fleekdrive Layout Setting Items:

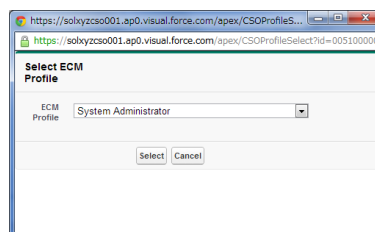
Yomi (Last)	Default is blank. It will be more accurate to sort user name on Fleekdrive if set. Please set as you need.
Yomi (First)	
Home Space	In initial setting account part of user ID is displayed. It will be display name of top space in my space.
Fleekdrive System Authority Name	If the Salesforce Profile is "System Administrator", it will be displayed as "System Administrator" for Fleekdrive, otherwise,

	it will be “Standard User”. Because of user information will not be displayed in edit page, so please click the link part of “Fleekdrive System Authority” of user information preference page, and select “Select Fleekdrive System Authority” in the different window.
Fleekdrive Active	If this is checked, Fleekdrive will be activated. Cannot set by own self.
	User will be created in Fleekdrive when the Fleekdrive Active is checked for the first time.
	If this setting of a user who has already used Fleekdrive is unchecked, Fleekdrive will be deactivated and cannot be used by the user. Files in My Space of deactivated user will be taken over to the My Space of the user that deactivated.
Lock	Unchecked by default. Cannot set by own self.
	Fleekdrive function is no longer available if this is checked. Saved data and setting are retained and will be available if this is unchecked.
Fleekdrive Chatter	Unchecked by default. Check this setting for using Fleekdrive Chatter. Fleekdrive Chatter setting will be available when create/edit space in Collabo Space and Company Space are included in user permissions.
Used Disk	Displays the amount used in user’s My Space. Non-editable.
Available Disk Space(GB)	User maximum My Space size will be 5GB for trial organization, and unlimited (set value of -1) for other organizations.
Used Delivery	Displays the used amount of the Files that was downloaded from the mail which the user delivered. Non-editable.
Available Delivery Size(GB)	Delivery or download’s maximum size will be 5GB for trial organization, and unlimited (set value of 0) for other organizations.
Activate Disk Space Threshold	When checked, it will notify you through mail if threshold is exceeded. When it is unchecked, the threshold and threshold unit will be blank.
Disk Space Threshold, Disk Space Threshold Unit	It can notify you if the used disk space is over the set value. Unit is GB or %. To make unlimited setting, set -1, and for invalid My Space, set 0. For neither of unlimited and invalid, set 1 or any other integer.
Activate Delivery Size Threshold	When checked, it will notify you through mail if threshold is exceeded. When it is unchecked, the threshold and threshold unit will be blank.
Delivery Size Threshold, Delivery Size	It can notify you if the used download amount is over the set value. Unit is GB or %. To make unlimited setting, set -1, and for invalid my space, set 0. For neither of unlimited and invalid, set 1 or any other integer
Fleekform Active	* Not used in Fleekdrive.

Custom Link:

Fleekdrive System Authority	Delete a member and add a new member on a group you belong to.
Fleekdrive Groups	Delete a member and add a new member on a group you belong to.

In case of editing Fleekdrive System Authority, select “Fleekdrive System Authority” in reference page of user information to display the window like the figure shown in the right. Press the “Select” button after selecting the Fleekdrive System Authority.



In case of editing Fleekdrive group, regarign to a group a user belong to, you can manage to delete the user from the group or add him/her as a new member.



Here are the reflected items to user information of Fleekdrive from Salesforce user information besides the [Fleekdrive] section.

Item	Explanation
Name	User's full name. Please enter the full name for Fleekdrive although only last name is required in Salesforce.
Email	Please enter mail address.  It does not reflect in Salesforce user information when mail address is changed and saved. Access the URL in confirmation mail and the edition will be completed. However, for Fleekdrive user information, the change is reflected right after press the save button.
Username	ID for login. It is available to change this later if user has a permission to change, or if the user is system administrator.
Company	It is used in case of writing a company name in a mail text to use Fleekdrive Files distribution function. If it is blank, the address is also blank. (Please adjust with Fleekdrive Delivery's signature.)  Please be careful to not display the company name since there are possibilities that other company user information such as customer portal will be included.
System Authority	Designate user permission in Salesforce. Fleekdrive System Authority will be "System Administrator" if the Salesforce System Authority is "System Administrator" in Fleekdrive user creation, and it will be "Standard User" if it was other Salesforce System Authority.
Active	It is available as Salesforce user if it is checked. Uncheck and invalid it, it will be unavailable as Fleekdrive user at the same time. Invalid user's Files will be taken over to user who set it.
Time Zone	In Fleekdrive, selectable time zone in Salesforce became available at August 2012. In case of selecting unavailable time zone for city addition in the future, this system will handle this as Pacific standard time (America/Los Angeles, Winter Time GMT-8:00)
Language	Japanese, English and Chinese (Simplified) are available in Fleekdrive. Will be displayed in English if it is set other languages.
Delegated Approver	If designated user is validated, it will be "Delegated Approver" also in Fleekdrive.
Manager	If designated user is validated, it will be as "Manager" in Fleekdrive.
Employee Number	Input value will be the "Employee Number" in Fleekdrive.

User

[Edit Layout](#) | [User Profile](#) | [Help for this Page](#) ?

Shirley Anney

[Permission Set Assignments](#) [1] | [Personal Groups](#) [0] | [Public Group Membership](#) [3] | [Queue Membership](#) [0] | [Managers in the Role Hierarchy](#) [3] | [OAuth Connected Apps](#) [1] | [Third-Party Account Links](#) [0] | [Login History](#) [10+]

User Detail

[Edit](#) [Reset Password](#)

Name	Shirley Anney	Role	CSO English Check team
Alias	Anney	User License	Salesforce Platform
Email	kuemura@solvz.co.jp	Profile	Standard Platform User
Username	csotest_en@csotest.com	Active	☒
Nickname	Anney i	Marketing User	☐
Title	英語テストユーザ	Offline User	☐
Company	Corp.EnglishTest	Knowledge User	☐
Department		Force.com Flow User	☐
Division		Service Cloud User	☐
Address	Canada Province Prince Edward Island Green Gables1908	Site.com Contributor User	☐
Time Zone	(GMT-04:00) Eastern Daylight Time (America/Indianapolis)	Site.com Publisher User	☐
Locale	English (United States)	Salesforce Classic User	☐
Language	English	Mobile Configuration	
Delegated Approver	山部 裕子 (csotest)	Accessibility Mode	☐ i
Manager	李 鋒欣	Color-Blind Palette on Charts	☐ i
Receive Approval Request Emails	Only if I am an approver	Touch User	☒ i
Newsletter	☐	Salesforce CRM Content User	☐
Admin Newsletter	☐	Receive Salesforce CRM Content Email Alerts	☐
Federation ID		Receive Salesforce CRM Content Alerts as Daily Digest	☐
		Make Setup My Default Landing Page	☐
		Allow Forecasting	☐
		Call Center	
		Phone	
		Extension	
		Fax	
		Mobile	
		Email Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
		Employee Number	1908
		Used Data Space	12 KB View
		Used File Space	21 KB View
		Last Login	2013/07/05 21:38
		Last Password Change or Reset	2013/04/17 13:35
Created By	山部 裕子 (csotest), 2012/05/30 21:45	Modified By	Shirley Anney, 2013/07/01 15:26

▼ Cloud Shared Office

Yomi(Last)		ECM Profile Name	System Administrator
Yomi(First)		ECM Active	☒
Home Space	Anney Shirley	Lock	☐
ECM Chatter	☒		
Used Disk	940.08 MB	Available Disk Space(GB)	-1 i
Used Delivery	83.36 MB	Available Delivery Size(GB)	-1 i
Activate Disk Space Threshold	☒	Disk Space Threshold	
		Disk Space Threshold Unit	
Activate Delivery Size Threshold	☒	Delivery Size Threshold	
		Delivery Size Threshold Unit	

Custom Link

[ECMProfile](#)[ECMGroups](#)[Edit](#) [Reset Password](#)

In the initial setting wizard, set the account part of your user ID.

If your organization intends to use it in regular basis, "-1," for limitless usage, will be displayed.

5.2. Using Chatter Synchronization Function

In this chapter, items which user should institute in case of using the Fleekdrive Chatter which notifies operations of Fleekdrive Files management.

5.2.1. Chatter Group Configuration

Before using Fleekdrive Chatter in Fleekdrive, please set Chatter to group and member. Although groups for all companies are created in initial status, some times it happens to not be able to use Fleekdrive Chatter from Fleekdrive, if the group members were not registered properly.

Please see the groups for all companies according to your environment.

5.2.2. Configure Chatter Synchronization in Fleekdrive

1. Fleekdrive Chatter setting is for every user.
2. Check mark the “Fleekdrive Chatter” of user information, the user will be able to configure the Fleekdrive Chatter setting in Files management page.
3. Fleekdrive Chatter setting is available only for Collabo Space and Company Space, but unavailable for My Space.
4. Set the Fleekdrive Chatter from “Salesforce Chatter” menu in the space creation page, space property edit page, or current space page.

The screenshot shows the 'New Space' configuration window. The 'Chatter' dropdown menu is open, showing three options: 'No notification with the Chatter' (highlighted in blue), 'Automatic notification with the Chatter', and 'Enter your comments, notification with the Chatter'. The 'Shared Contact Groups' dropdown is also open, showing 'すべてのSOLXYZ Co., Ltd.' (highlighted in blue) and 'Test Team 1'. Red arrows point from the text in the list above to these dropdowns.

5. It notifies the user's operation to the Chatter group member who set the notification setting of Chatter.
6. Notification setting for space has to be done for every user.

⚠ Please refer “Single Sign-On Setting” in 『Fleekdrive User Guide.doc』 for other details.

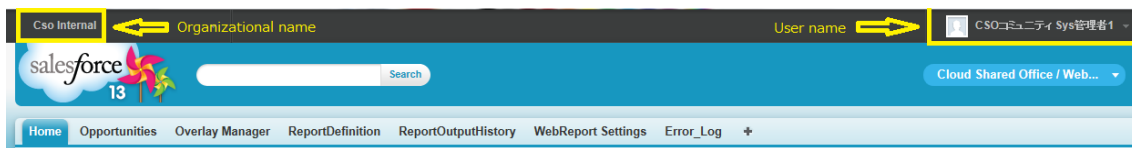
5.3. In a case where a Salesforce community user uses Fleekdrive menu.

For a case when you share Fleekdrive menu with a Salesforce community user, items you need to set are explained below.

5.3.1. Activate Digital Experience (community)

Salesforce Setup > Build > Customize > Digital Experience > All Sites : on the basis that you've already activated sites on the setting menu.

By activating sites, the user interface of all users within an organization will be modified as the below image.



5.3.2. Tab display settings of Fleekdrive

1. Salesforce Setup > Build > Customize > Digital Experience > All Sites, click Workspaces for existing sites.

Digital Experiences

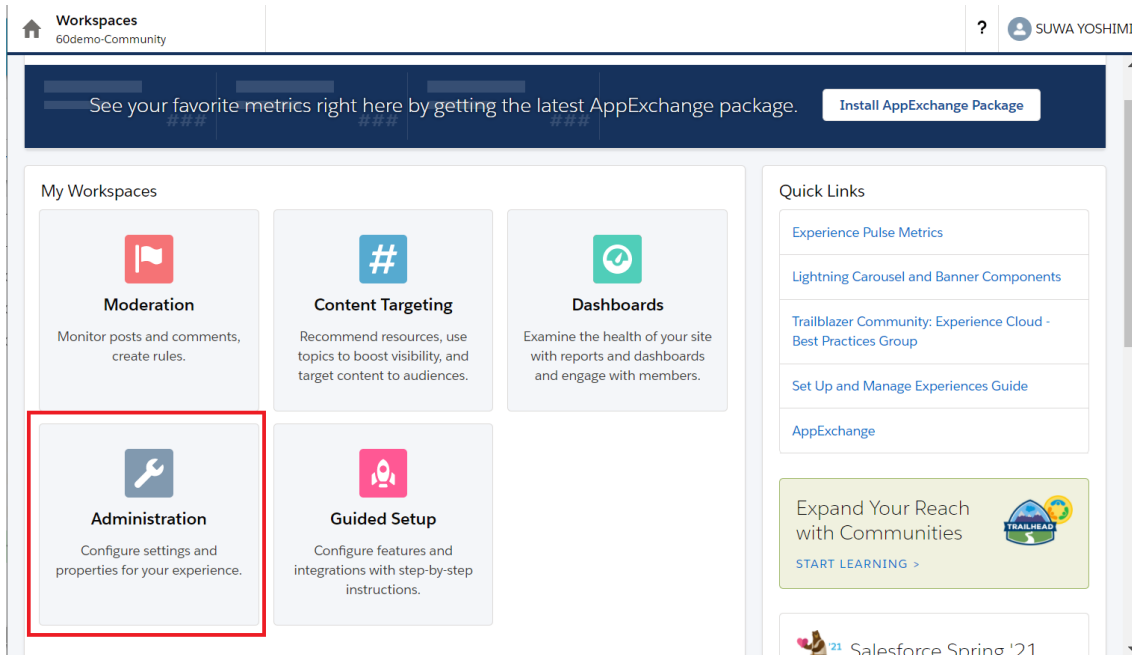
[Visit our Trailblazer Community](#) | [Help for this Page](#) ?

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a member, the URL isn't linked.

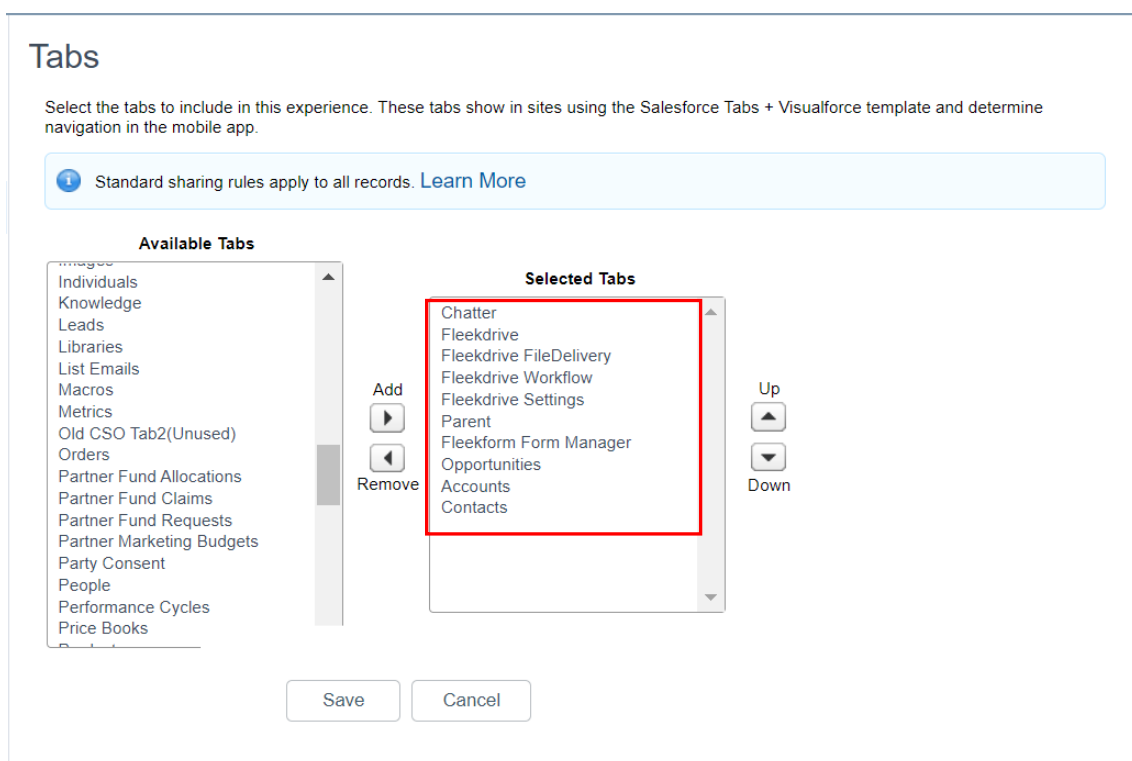
Maximum number of sites (including active, inactive, and preview): 100

All Sites New				
Action	Name	Description	URL	Status
Workspaces	60demo-Community		https://solxyz60demo.force.com/customers	Active
Workspaces Builder	AccountCommunity		https://solxyz60demo.force.com/ac	Active
Workspaces Builder	Koa		https://solxyz60demo.force.com/Koa	Active

2. Click on the "Administration" menu in My workspaces.



3. Add the Fleekdrive tab used on the Experience sites to the "Selected Tabs".



4. Similarly, click "Members" on the left side and add a profile that uses the experience sites.

Members

All users with the selected profiles **OR** permission sets are members.

 When you add a profile or permission set, new site members receive a welcome email message. If you want to prevent those site members from receiving welcome email messages, deselect the Send welcome email option.

Select Profiles

Search: for:

Available Profiles

- ☒ COPY_SYSAD
- ☐ Company Communities User カスタム
- ☐ Custom_One APP
- ☐ Custom_標準ユーザ
- ☐ custom_システム管理者_
- ☐ カスタマーポータルマネージャ
- ☐ カスタマーポータルユーザ

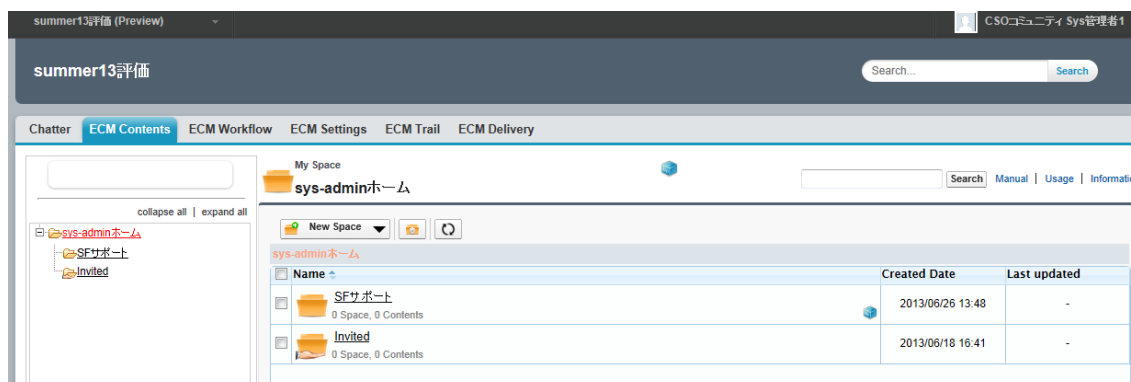
Add


Remove


Selected Profiles

- custom_CO
- test_oneapp
- custom_システム管理者
- Company Communities User
- Community_c
- System Administrator
- Customer Portal Manager
- Standard User
- Read Only
- Solution Manager
- Marketing User
- Contract Manager
- Standard Platform User
- Customer Portal User

- When the user to whom this setting applies logs in, the selected tab is displayed and the operation according to the privilege of the Fleekdrive system authority is possible.



5.4. About Activated Profile after the Package Installation

Portal user such as customer portal user is not available unless validated manually if it was not validated before package installation is completed.

5.4.1. For Activated Profile after the Installation.

- Select profile which was added after through Setup>Administration Setup> Manage Users> Profile.
* e.g.) Customer Portal Manager Custom

User Profiles

[Help for this Page](#) ?

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Profile New			
Action	Name	User License	Custom
Edit	Chatter External User	Chatter External	☐
Edit	Chatter Free User	Chatter Free	☐
Edit	Chatter Moderator User	Chatter Free	☐
Edit	Chatter Only User	Chatter Only	☐
Edit	Content Only User	Content Only	☐
Edit	Contract Manager	Salesforce	☐
Edit	Customer Portal Manager	Customer Portal Manager	☐
Edit	Customer Portal Manager Custom	Customer Portal Manager Custom	☐
Edit	Customer Portal Manager Standard	Customer Portal Manager Standard	☐
Edit	Customer Portal User	Customer Portal User	☐
Edit	Force.com - One App User	Force.com - One App	☐
Edit	Gold Partner User	Gold Partner	☐
Edit	High Volume Customer Portal User	High Volume Customer Portal	☐
Edit	Knowledge Only User	Knowledge Only	☐
Edit	Marketing User	Salesforce	☐
Edit	Read Only	Salesforce	☐
Edit	Siteforce Only User	Siteforce Only	☐
Edit	Solution Manager	Salesforce	☐
Edit	Standard Platform User	Salesforce Platform	☐
Edit	Standard User	Salesforce	☐
Edit	System Administrator	Salesforce	☐

2. Confirm the [Enabled Apex Class Access], [Enabled Visualforce Page Access] in the bottom of System Authority page.

Following steps are not necessary in case of Apex Class name and Visualforce Page name are displayed like below.

Profile Help for this Page ?

Customer Portal Manager Custom

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 information.

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 to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[28\]](#) | [Enabled Visualforce Page Access \[215\]](#) | [Enabled External Data Source Access \[0\]](#)

Profile Detail Edit Clone View Users

Enabled Apex Class Access Edit Enabled Apex Class Access Help ?

Apex Class Name	AppExchange Package Name
SOLXYZCSO001.BeforeDeliveryController	CloudSharedOffice
SOLXYZCSO001.CSOPostService	CloudSharedOffice

Enabled Visualforce Page Access Edit Enabled Visualforce Page Access Help ?

Visualforce Page Name	AppExchange Package Name
SOLXYZCSO001.AddContent	CloudSharedOffice
SOLXYZCSO001.AddContentResult	CloudSharedOffice

However, please validate them with following steps in case of showing “No Apex Classes enabled” or “No Visualforce Page enabled”.

Enabled Apex Class Access Edit [Enabled Apex Class Access Help](#)

No Apex Classes enabled

Enabled Visualforce Page Access Edit [Enabled Visualforce Page Access Help](#)

No Visualforce Pages enabled

- Press the “Edit” button to display the validation page.
- Select all Apex Class in the left “Enable Apex Class Access” and press the “Add” button in the middle.

Enable Apex Class Access

Save Cancel

1. Select All Available Apex Classes

Enabled Apex Classes

--None--

Add

Remove

SOLXYZCSO001.BeforeDeliveryController
SOLXYZCSO001.CSOPostService
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl

- Confirmed the selected Apex Class move to the right “Enabled Apex Classes”, and press the “Save” button.

Enable Apex Class Access

Save Cancel

Available Apex Classes

Enabled Apex Classes

--None--

Add

Remove

SOLXYZCSO001.BeforeDeliveryController
SOLXYZCSO001.CSOPostService
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
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SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl
SOLXYZCSO001.CSOPostHttpCalloutMockImpl

- Press the “Edit” button in Enabled Visualforce Page Access to display validation page.

Enabled Visualforce Page Access Edit [Enabled Visualforce Page Access Help](#)

No Visualforce Pages enabled

- Select all Visualforce page in the left “Available Visualforce Pages” and press the “Add” button in the middle.

Enable Visualforce Page Access

8. Confirm if selected Visualforce page moved to the right in “Enabled Visualforce Pages”, and press the “Save” button.

Enable Visualforce Page Access

9. It is complete if it is confirmed that the activated Apex Class and Visualforce page are displayed as a list.

Enabled Apex Class Access		Edit	Enabled Apex Class Access Help ?
Apex Class Name	AppExchange Package Name		
SOLXYZCSO001.BeforeDeliveryController	CloudSharedOffice		
SOLXYZCSO001.CSOPostService	CloudSharedOffice		
:			
Enabled Visualforce Page Access		Edit	Enabled Visualforce Page Access Help ?
Visualforce Page Name	AppExchange Package Name		
SOLXYZCSO001.AddContent	CloudSharedOffice		
SOLXYZCSO001.AddContentResult	CloudSharedOffice		

⚠ Please set with same way if there are several profiles which were added after the installation.

5.5. About Profiles which Need Manual Configuration after Installation

It happens some times to not be able to use Fleekdrive menu with only package installation

depending on Salesforce license or profiles type which were set by user.

5.5.1. Manual Configuration for Each Profile

In case of profiles which were installed but cannot use Fleekdrive because of license limitation, please validate Apex Class and Visualforce by following Step 1-9 in “5.3

5.6. Place “Fleekdrive Delivery” Button

In Fleekdrive in the Salesforce, it can place “Fleekdrive Delivery” button in the Lead, Account, Contact, and Opportunity tab in sales menu.

It will be available to send to all mail addresses which were registered in sampled view with using Salesforce function.

5.6.1. Place and Activate “Fleekdrive Delivery” Button

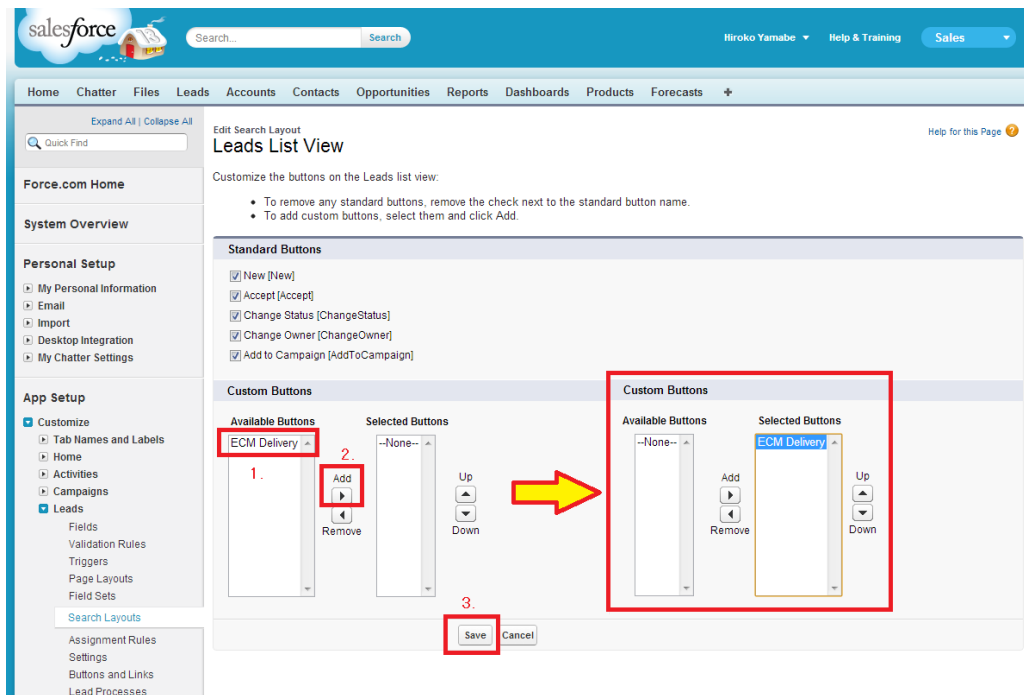
Please add “Fleekdrive Delivery” button with following steps for Lead or Account. In this paragraph, it explains about the Lead.

Display the tree menu Setup>App Setup>Customize>Leads>Search Layouts..

Press edit button of “Leads List View” in “Search Layouts”.

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Name, Title, Phone, Company, Email, Lead Status, Owner Alias		森田 隆雄, 8/2/2012 1:58 PM
Edit	Lookup Dialogs	Name, Company	N/A	森田 隆雄, 8/2/2012 1:58 PM
Edit	Lookup Phone Dialogs	Name, Company, Phone, Mobile	N/A	森田 隆雄, 8/2/2012 1:58 PM
Edit	Leads Tab	Name, Company, Phone	N/A	森田 隆雄, 8/2/2012 1:58 PM
Edit	Leads List View	N/A	New, Accept, Change Status, Change Owner, Add to Campaign	Hiroko Yamabe, 2/7/2013 4:39 PM
Edit	Search Filter Fields		N/A	森田 隆雄, 8/2/2012 1:58 PM

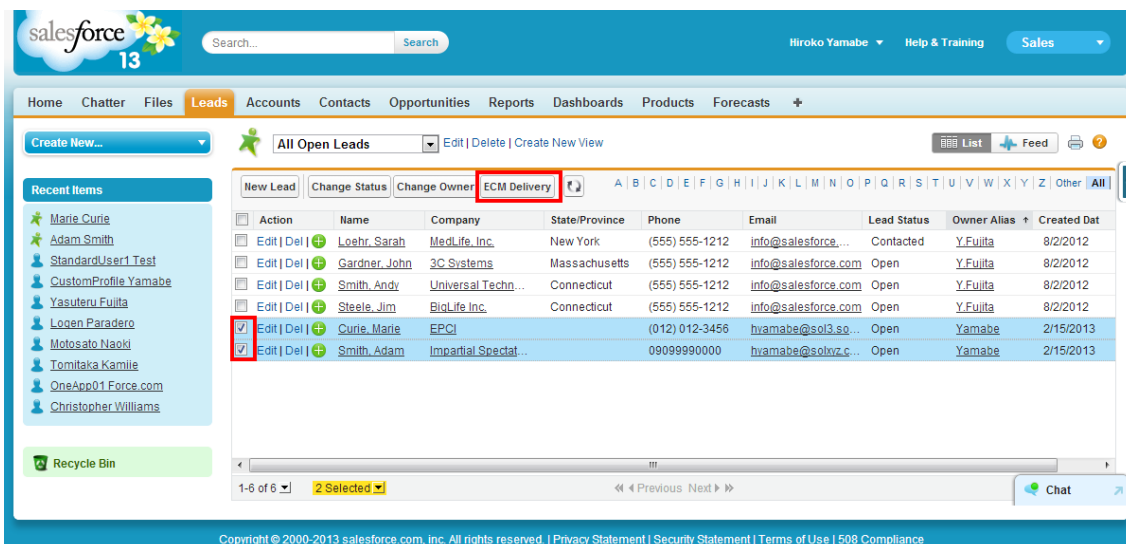
Left side of “Custom Buttons”: Select “Fleekdrive Delivery”, then press the “Add” button to move the selected button to the right side, and press “Save” button.



5.6.2. Lead Distribution Procedure

Display View with sampling conditions in the Lead tab in sales menu.

Select all items or partial items to deliver and press “Fleekdrive Delivery” button.



The distribution page will be displayed as same as selecting “Fleekdrive Delivery” in one click menu of Files management page.

 Please refer the other chapter for Files distribution's detailed explanations.

Cloud Shared Office
Delivery

Send Cancel

Subject

512 characters remaining

Message

Create Merge Field

2 addresses have been selected.

Delete Direct input Address Book

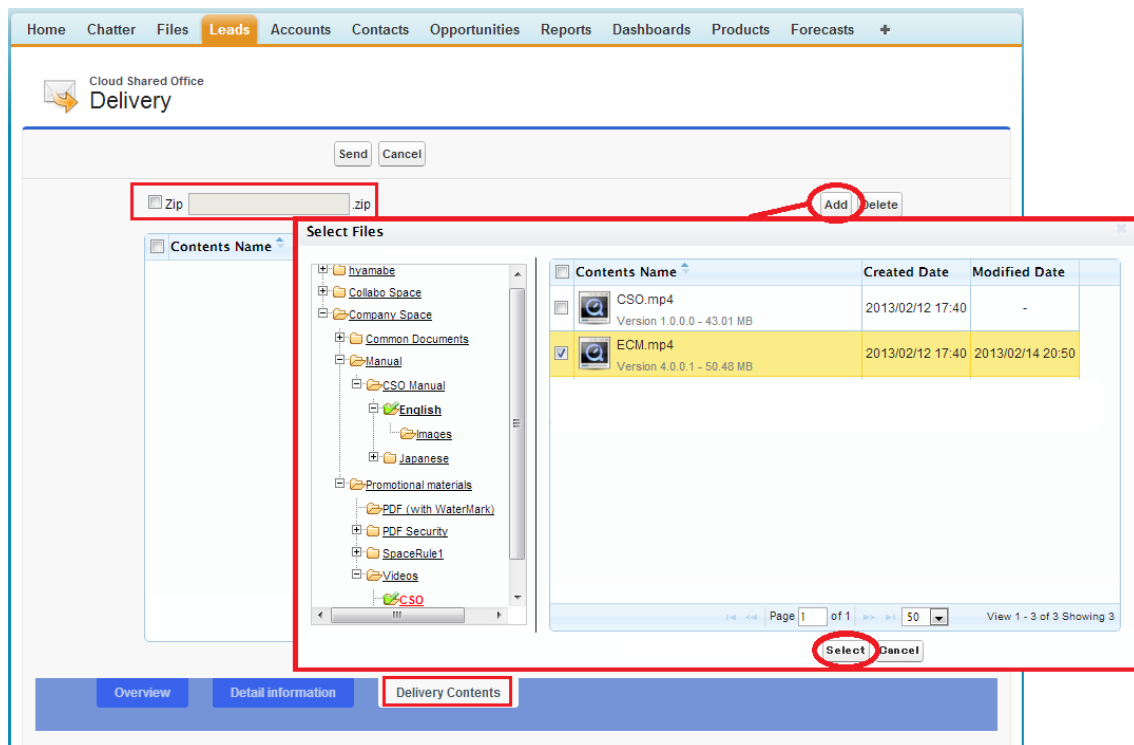
Name	Company name	Type of entry
Adam Smith hyamabe@sobkyz.co.jp	Impartial Spectator Co. Ltd.	Lead
Marie Curie hyamabe@sol3.sobkyz.co.jp	EPCI	Lead

Delivery Contents Delivery contents not found.

Overview Detail information Delivery Contents

If a detailed setup is not needed, only the following basic information in Overview tab needs to be set up in order for delivery to be possible. The items in basic information which can be set up is as follows.

Item Name	Explanation
Subject	Subject of distribution items. It also for mail subject.
Message	Enter the message with file distribution. It can also be blank.
Create Merge Field	It will be displayed in case of displaying distribution page with selecting "Fleekdrive Delivery" button from Salesforce view. Display parameter that makes it settable, with using values witch was registered in Lead. It will be work with selecting "Select Field" and copy parameter in "Merge Field Value" and paste it to message.
Direct input	It can enter e-mail address.
Address book	It can select address from contact list. It can search and select registered name and mail address in Lead if it is "Lead" in case of displaying from "Fleekdrive Delivery" button.



Delivery Files tab, you can add or delete Files.

Items Name	Explanation
Add	Press the “Add” button to open the “Select Files” modal page for selecting items. It will be possible to deliver Files from different spaces by pressing the “Select” button for each space.
Zip	Check the “Zip”, It will be available to send as one compressed file. Also rename the file name.

In case of detailed setting is needed, press “Detail information” tab section to widen the menu.

Items Name	Explanation
Open Period	Period duration that you will be able to receive distributed Files. If set to blank, it will be for a week from date when data was sent.
Number of Downloads	The download's limitation value for each distributed Files by address and Files can be set. Count 1 for each Files download. It will still be counted even download is cancelled since it will be counted when the link is clicked.
Password	Set a password to access the download site for receiver. Password notification message will be sent. The entered password will be displayed with checked "Show Password".
Signature	The signature which was applied [Signature Settings] in [Fleekdrive Delivery Tab]>[Delivery settings] will be displayed as default setting. It can still be sent even if Signature is edited or set to blank. Selecting the blank field at the top will mean that no signature will be used.

Example of Inserting Text to Message and Editing it

An object can be inserted into the message field of Salesforce.

1. Press "Create Merge Field", then the field of object in Salesforce will be displayed, and copy the "Merge Field Value".
2. Paste the "Merge Field Value" in Message.

Home Chatter Files **Leads** Accounts Contacts Opportunities Reports Data

Cloud Shared Office
Delivery

Send Cancel

Subject Contact has been completed.

Message

Thank you inquire about Cloud Shared Office / ECM.
Contact us from [Lead.Name] We have received with this application.

I am writing to update you about Cloud Shared Office / ECM for salesforce.
As of this email, you can by using the CSO/ECM, easily send large files such as manuals and promotional videos.
Since manual also sent, please utilize the CSO also like [Lead.Company] means.

2 addresses have been selected.

Destination

Name	Company name	Type of entry
Adam Smith hyamabe@solxyz.co.jp	Impartial Spectator Co. Ltd.	Lead
Marie Curie hyamabe@sol3.solxyz.co.jp	EPCI	Lead

Delivery Contents (Eng)_CloudSharedOffice_ECM_for Salesforce User_Guide_V2.0.1.doc2 other contents.

Overview Detail information Delivery Contents

Create Merge Field

Select Field
Lead Name

Copy Merge Field Value
[Lead.Name] 1.Copy

Copy and paste the merge field value into your message below.

2.Paste

Create Merge Field

Delete Direct input Address Book

If there are no problems, click "Send" and you're done.

Example of Sent Mail with Inserted Text in Message

[CSO File delivery]Contact has been completed. [oGeYEXLNBU] - Mozilla Thunderbird

差出人 info@cloudsharedoffice.com

件名 [CSO File delivery]Contact has been completed. [oGeYEXLNBU]

宛先 Adam Smith

11:44

Dear Adam Smith. <-- Lead.Name

Thank you inquire about Cloud Shared Office / ECM.
Contact us from Adam Smith. We have received with this application. input Message

I am writing to update you about Cloud Shared Office / ECM for salesforce.
As of this email, you can by using the CSO/ECM, easily send large files such as manuals and promotional videos.
Since manual also sent, please utilize the CSO also like Impartial Spectator Co. Ltd. means. <--Lead,Company

Hiroko Yamabe
Solxyz Co., Ltd. -- Cloud Shared Office
E-mail: hyamabe@solxyz.co.jp
Phone: 03-6722-5015

<-- your signature

We have addressed our customers to check your file.
Please download the file from the following URL.
<https://ecm.cloudsharedoffice.com/dlpotal?key=13tdC4D5cankdvkBEE00>

Delivery ID : oGeYEXLNBU
The sender : Yamabe Hiroko
E-mail of the sender : hyamabe@solxyz.co.jp
Sent time : 2013/02/15 11:44:30 JST +0900
Validity period : 2013/02/15 to 2013/03/31
Subject : Contact has been completed.

Files that are deposited

(Eng)_CloudSharedOffice_for_salesforce_ECM_Installation_Guide.doc
ECM.mp4
(Eng)_CloudSharedOffice_ECM_for Salesforce User_Guide_V2.0.1.doc

<-- Select Contents Name

This email has been sent to you automatically by the system.
Therefore, even if you reply to this email contact us, we are not able to answer.
Please do not reply to this email.

"Cloud Shared Office" : Content management services with the ability to prevent information leaks on Cloud.
<https://ecm.cloudsharedoffice.com>

ダウンロードされたメッセージはありません

6. Uninstall

In this chapter, it explains about uninstallation of Fleekdrive.

6.1. For Fleekdrive

It explains how to uninstall the Fleekdrive.

6.1.1. Confirmation for Uninstallation

Setup>App Setup>Installed Packages will display Fleekdrive/Fleekform.

Installed Packages

Help for this Page ?

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.



Installed Packages					
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date
Uninstall	CloudSharedOffice	株式会社ソルクシーズ	2.0 (Beta 8)	SOLXYZCS0001	12/16/2012 8:44 PM
Description					
・Salesforce帳票のPDF生成/配信/履歴管理					
セールス業務帳票の作成や管理等の手間と時間を削減します。					
・Salesforce連携セキュアECM					
クラウドのコンテンツをセキュア(暗号化、持ち出し禁止等)にライフサイクル管理します。					
Data from Uninstalled Packages					
No uninstalled package data archives					

Even if "Uninstall" button is clicked and the list of package components that are configured are installed, it still cannot be uninstalled.

Hiroko Yamabe
Help & Training
Cloud Shared Office / ECM

[Home](#)
[Chatter](#)
[Contents](#)
[ECM Delivery](#)
[ECM Workflow](#)
[ECM Trail](#)
[ECM Settings](#)

Expand All | Collapse All
 Quick Find

[Force.com Home](#)

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
- Deploy
 - Schema Builder
 - Installed Packages
- AppExchange Marketplace
- Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

Uninstalling a Package

Unable to uninstall package

Component Type	Name	Problem
Visualforce Page	RelatedContentsListAccount	The object is in use by another object and cannot be deleted. Account ECM Layout2
Visualforce Page	RelatedContentsListContact	The object is in use by another object and cannot be deleted. Contact ECM Layout2
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: Standard User
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: Standard Platform User
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: Read Only
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: Solution Manager
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: Marketing User
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: Contract Manager
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Page Layout	User.User Layout CSO	This installed component is referenced by a locally created component: System Administrator
Apex Class	CSORest	The Apex class "CSORest" is currently in use by a scheduled job and cannot be deleted.
Apex Class	WRScheduledCSOUserBatch	The Apex class "WRScheduledCSOUserBatch" is currently in use by a scheduled job and cannot be deleted.
Apex Class	WRRest	The Apex class "WRRest" is currently in use by a scheduled job and cannot be deleted.
Apex Class	WRUserBatch	The Apex class "WRUserBatch" is currently in use by a scheduled job and cannot be deleted.
Apex Class	CSOUserInfo	The Apex class "CSOUserInfo" is currently in use by a scheduled job and cannot be deleted.
Apex Class	CSOUserBatch	The Apex class "CSOUserBatch" is currently in use by a scheduled job and cannot be deleted.
Apex Class	JSONUtil	The Apex class "JSONUtil" is currently in use by a scheduled job and cannot be deleted.
Apex Class	ProcessorControl	The Apex class "ProcessorControl" is currently in use by a scheduled job and cannot be deleted.
Apex Class	ScheduledCSOUserBatch	The Apex class "ScheduledCSOUserBatch" is currently in use by a scheduled job and cannot be deleted.
Apex Class	WRCSOUserInfo	The Apex class "WRCSOUserInfo" is currently in use by a scheduled job and cannot be deleted.
Apex Class	WRRest	The Apex class "WRRest" is currently in use by a scheduled job and cannot be deleted.
Button or Link	ECM_RelatedContents	The object is in use by another object and cannot be deleted. Account ECM Layout2
Button or Link	ECM_RelatedContents	The object is in use by another object and cannot be deleted. Contact ECM Layout2

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Please perform following steps to uninstall.

6.1.2. Change Page Layout Assignment

1. Fleekdrive Page layout is used for User Information.

Setup>Administration Setup>Manage Users>Profiles will display Profile list.

User Profiles

[Help for this Page](#) ?

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Profile New			
Action	Name	User License	Custom
Edit	Chatter External User	Chatter External	☐
Edit	Chatter Free User	Chatter Free	☐
Edit	Chatter Moderator User	Chatter Free	☐
Edit	Chatter Only User	Chatter Only	☐
Edit	Content Only User	Content Only	☐
Edit	Contract Manager	Salesforce	☐
Edit	Customer Portal Manager	Customer Portal Manager	☐
Edit	Customer Portal Manager Custom	Customer Portal Manager Custom	☐
Edit	Customer Portal Manager Standard	Customer Portal Manager Standard	☐
Edit	Customer Portal User	Customer Portal User	☐
Edit	Force.com - One App User	Force.com - One App	☐
Edit	Gold Partner User	Gold Partner	☐
Edit	High Volume Customer Portal User	High Volume Customer Portal	☐
Edit	Knowledge Only User	Knowledge Only	☐
Edit	Marketing User	Salesforce	☐
Edit	Read Only	Salesforce	☐
Edit	Siteforce Only User	Siteforce Only	☐
Edit	Solution Manager	Salesforce	☐
Edit	Standard Platform User	Salesforce Platform	☐
Edit	Standard User	Salesforce	☐
Edit	System Administrator	Salesforce	☐

2. Select and refer to one of the profiles which could not be uninstalled.
 - * If the profile is not needed, you may delete it. But if the user such as “System Administrator” which configured profile exists, it cannot be deleted.

Profile

Standard User

[Help for this Page](#)

[« Back to List: Users](#)

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 information.

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 to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[26\]](#) | [Enabled Visualforce Page Access \[210\]](#) | [Enabled External Data Source Access \[0\]](#)

Profile Detail

[Edit](#) [Clone](#) [View Users](#)

Name	Standard User		
User License	Salesforce	Custom Profile	☐
Created By	秦輝 藤田 8/2/2012 1:58 PM	Modified By	植(62demo) 高橋 12/16/2012 10:34 PM

Console Settings

Console Layout [\[Edit \]](#)

Page Layouts

Standard Object Layouts

Home Page Layout	Dashboard Home Page Default [View Assignment]	Event	Event Layout [View Assignment]
Account	Account ECM Layout2 [View Assignment]	Lead	Lead Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Campaign	Campaign Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Campaign Member	Campaign Member Page Layout [View Assignment]	Product	Product Layout [View Assignment]
Case	Case Layout [View Assignment]	Solution	Solution Layout [View Assignment]
Case Close	Close Case Layout [View Assignment]	Task	Task Layout [View Assignment]
Contact	Contact Layout [View Assignment]	User	User Layout CSO [View Assignment]
Contract	Contract Layout [View Assignment]		

Custom Object Layouts

- Click "View Assignment" of User in standard object layout of screen layout in Profile details.

Page Layout Assignment

User

[Help for this Page](#)

The table below shows the page layout assignments for different profiles.

Profiles		Page Layout
Chatter Only User		User Layout CSO
Content Only User		User Layout CSO
Contract Manager		User Layout CSO
Customer Portal Manager		User Layout CSO
Customer Portal Manager Custom		User Layout CSO
Customer Portal Manager Standard		User Layout CSO
Customer Portal User		User Layout CSO
Force.com - One App User		User Layout CSO
Gold Partner User		User Layout CSO
High Volume Customer Portal User		User Layout CSO
Knowledge Only User		User Layout CSO
Marketing User		User Layout CSO
Read Only		User Layout CSO
Siteforce Only User		User Layout CSO
Solution Manager		User Layout CSO
Standard Platform User		User Layout CSO
Standard User		User Layout CSO
System Administrator		User Layout CSO

4. Click “Edit Assignment” button.
5. Select a profile which “User Layout CSO” is set and change the page layout to “User Layout”. Click “Save” button after the change is completed.

Edit Page Layout Assignment

[Help for this Page](#) ?

User

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

3. **Save** **Cancel**

Page Layout To Use: -- Select Page Layout -- 18 Selected 0 Changed

2. -- Select Page Layout --
User Layout
User Layout CSO

1. Select All

Profiles	Page Layout
Chatter Only User	User Layout CSO
Content Only User	User Layout CSO
Contract Manager	User Layout CSO
Customer Portal Manager	User Layout CSO
Customer Portal Manager Custom	User Layout CSO
Customer Portal Manager Standard	User Layout CSO
Customer Portal User	User Layout CSO
Force.com - One App User	User Layout CSO
Gold Partner User	User Layout CSO
High Volume Customer Portal User	User Layout CSO
Knowledge Only User	User Layout CSO
Marketing User	User Layout CSO
Read Only	User Layout CSO
Siteforce Only User	User Layout CSO
Solution Manager	User Layout CSO
Standard Platform User	User Layout CSO
Standard User	User Layout CSO
System Administrator	User Layout CSO

Save **Cancel**

6. If “CSO Layout” for “Fleekdrive Related List” is added in Page Layout of a sales menu, it is necessary to delete it.
(Leads, Accounts, Contacts, Opportunities, Cases, Contracts)

6.1 For the Leads, press the edit of Setup>App Setup>Customize>Leads> Page Layouts.

6.2 Click “Page Layout Assignment” in “Page Layouts”.

Lead Page Layout

[Help for this Page](#) ?

This page allows you to create different page layouts to display Lead data.

After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Lead Page Layouts				
		New	Page Layout Assignment	
Action	Page Layout Name	Installed Package	Created By	Modified By
Edit Del	Lead ECM Layout	CloudSharedOffice	Hiroko Yamabe, 2/7/2013 3:16 AM	Hiroko Yamabe, 2/7/2013 3:19 AM
Edit Del	Lead Layout		Yasuteru Fujita, 8/1/2012 9:58 PM	Yasuteru Fujita, 8/1/2012 9:58 PM

- 6.3 Click “Edit Assignment” button.

The table below shows the page layout assignments for different profiles.

Edit Assignment	
Profiles	Page Layout
Contract Manager	Lead Layout
Gold Partner User	Lead Layout
Marketing User	Lead Layout
Read Only	Lead Layout
Solution Manager	Lead Layout
Standard User	Lead Layout
System Administrator	Lead Layout
Edit Assignment	

- 6.4 Select a profile which “Lead CSO Layout” is set and change the page layout to “Lead Layout”. Click “Save” button after the change is completed.

6.1.3. Delete Scheduled Jobs

7. Setup>Administration Setup>Monitoring>Scheduled Jobs to display the list of scheduled jobs.

All Scheduled Jobs [Help for this Page](#)

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: [All Scheduled Jobs](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

Action	Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage Del	CSOUserScheduled	藤田 泰輝	12/16/2012 9:06 PM	2/7/2013 3:00 AM	2/8/2013 3:00 AM	Scheduled Apex
Manage Del	WRCSOUserScheduled	藤田 泰輝	12/16/2012 9:16 PM	2/7/2013 4:00 AM	2/8/2013 4:00 AM	Scheduled Apex

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

8. Click “Del” of “CSOUserScheduled” and “WRCSOUserScheduled”. Confirmation message of deletion will be popped up, click “OK” to complete the deletion.

All Scheduled Jobs

[Help for this Page](#)

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: [All Scheduled Jobs](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run	Type
No records to display.					

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

6.1.4. Delete “Fleekdrive Delivery” Button

If “Fleekdrive Delivery” button is added in search layout of a sales menu (configured in 5.6), it is

necessary to delete it.

- For the Leads, press the edit of Setup>App Setup>Customize>Leads> Search Layouts. Click edit link of “Leads List View” in “Search Layouts”.

Lead Search Layouts

Search layouts allow you to select the standard and custom fields that are displayed in the following search features:

- Search Results Columns for search and tagging. [View example](#)
- Lookup Dialogs that pop up when you click the magnifying glass on Lookup fields. [View example](#)
- Lookup Phone Dialogs that pop up when you click the magnifying glass on a SoftPhone dial pad. [View example](#)
- Recently viewed, modified, and created records lists displayed on tab home page. [View example](#)
- Search Results Filter Fields for search. [View example](#)

Search layouts also allow you to select the standard and custom buttons that are displayed in the following search features:

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Name, Title, Phone, Company, Email, Lead Status, Owner Alias		森澤 藤田, 8/2/2012 1:58 PM
Edit	Lookup Dialogs	Name, Company	N/A	森澤 藤田, 8/2/2012 1:58 PM
Edit	Lookup Phone Dialogs	Name, Company, Phone, Mobile	N/A	森澤 藤田, 8/2/2012 1:58 PM
Edit	Leads Tab	Name, Company, Phone	N/A	森澤 藤田, 8/2/2012 1:58 PM
Edit	Leads List View	N/A	New, Accept, Change Status, Change Owner, Add to Campaign, ECM Delivery	Hiroko Yamabe, 2/7/2013 4:27 PM
Edit	Search Filter Fields		N/A	森澤 藤田, 8/2/2012 1:58 PM

- Select “Fleekdrive Delivery” in the right “Selected Buttons” and delete it like below, and save it.

Please delete the “Fleekdrive Delivery” button for the other sales menu as well.

Edit Search Layout

Leads List View

Customize the buttons on the Leads list view:

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Standard Buttons

- ☒ New [New]
- ☒ Accept [Accept]
- ☒ Change Status [ChangeStatus]
- ☒ Change Owner [ChangeOwner]
- ☒ Add to Campaign [AddToCampaign]

Custom Buttons

Available Buttons: ECM Delivery

Selected Buttons: --None--

Add Remove Up Down

Save Cancel

6.1.5. Uninstall Execution

11. Execute Uninstall of Fleekdrive

Setup>App Setup>Installed Packages will display “Fleekdrive/Fleekform”.

Installed Packages

[Help for this Page](#)

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as “In Development” and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.



Installed Packages					
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date
Uninstall	CloudSharedOffice	株式会社ソルクシーズ	2.0 (Beta 8)	SOLXYZCSO001	12/16/2012 8:44 PM
Description ・Salesforce帳票のPDF生成配信履歴管理 セールス業務帳票の作成や管理等の手間と時間を削減します。 ・Salesforce連携セキュアECM クラウドのコンテンツをセキュア(暗号化、持ち出し禁止等)にライフサイクル管理します。					
Data from Uninstalled Packages					
No uninstalled package data archives					

12. Click “Uninstall”, package component warning message and components list to delete will be displayed.

Uninstalling a Package

[Help for this Page](#)

**Uninstalling this package will:**

- Permanently delete all components in this package (listed below)
- Permanently delete all customizations you have made to these components
- Permanently delete all data that you have created for all custom objects in this package (listed below)
- Permanently delete any reports, views, and custom tabs based on the custom objects in this package
- Permanently delete any relationships and related lists associated with the custom objects in this package

During an uninstall, salesforce.com automatically generates an export file containing the package data as well as related notes and attachments. This file is available for 48 hours if you need to retrieve the data. Note that re-importing your export data is not automatic. Reload your data manually and recreate any relationships between objects. Some components can not be recreated and others require special treatment. [Tell me more](#)

Package Components			
Action	Name	Parent Object	Type
	Account ECM Layout	Account	Page Layout
	AddContent		Visualforce Page
	AddContentController		Apex Class
	AddContentControllerTest		Apex Class
	AddContentResult		Visualforce Page
	AddSpace		Visualforce Page
	AppConfig		Visualforce Page
	AppConfigController		Apex Class
	BeforeDelivery		Visualforce Page

13. Check “Yes” as shown below and click “Uninstall”.

WRUserRoleSynchronizationWork	9
WRUserRoleSynchronizationManage	1
WRSetting	9

☒ Yes, I want to uninstall this package and permanently delete all associated components

Uninstall

14. Installed package will display and show “In Progress” of uninstalled package.

Installed Packages

Help for this Page ?

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as “In Development” and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages					
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date
	CloudSharedOffice	株式会社ソルクシーズ	2.0 (Beta 8)	SOLXYZCS0001	12/16/2012 8:44 PM
Description ・Salesforce帳票のPDF生成/配信/履歴管理 セールス業務帳票の作成や管理等の手間と時間を削減します。 ・Salesforce連携セキュアECM クラウドのコンテンツをセキュア(暗号化、持ち出し禁止等)にライフサイクル管理します。					

Data from Uninstalled Packages					
Action	Package Name	Namespace	Expiration Date	Uninstall Status	Uninstall Date
	CloudSharedOffice (Version Name 2.0)	SOLXYZCS0001	2/9/2013 5:12 PM	In Progress	2/7/2013 5:12 PM

15. After the uninstallation is completed, notification message will be sent to user.

Title: Successful Uninstallation of “Fleekdrive/Fleekform” Package

16. If you need to save the uninstalled data, you need to “Download” within 48 hours the export data included in the uninstalled package from access package screen which the link access is included in the message.

Installed Packages

Help for this Page ?

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as “In Development” and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages					
No packages installed					

Data from Uninstalled Packages					
Action	Package Name	Namespace	Expiration Date	Uninstall Status	Uninstall Date
Download Del	CloudSharedOffice (Version Name 2.0)	SOLXYZCS0001	2/9/2013 5:12 PM	Uninstall Complete	2/7/2013 5:12 PM

17. Lastly, delete unnecessary package data and it is completed.

7. Note

7.1. Using Fleekdrive Function from Salesforce

In Setup> My Personal Information>Personal Information menu of Salesforce while Fleekdrive menu is selected and confirmation error occurs after changing information, please contact system administrator.

--> Since error is outputted to "Fleekdrive Trail", please reset based on Files.

Please do not check in the box the following items in (Salesforce) Setup> Administer > Security Controls > Session Settings.

If checked, an authentication error will occur and Fleekdrive cannot be used.

- Lock sessions to the IP address from which they originated
- Enforce login IP ranges on every request

Please do not check in the box the following item in (Salesforce) Setup> Administer > Manage Users > Profiles.

If checked, an authentication error will occur and Fleekdrive cannot be used.

- IP Restrict Requests

7.2. Using Fleekdrive Function for both Salesforce and Fleekdrive.

- For Fleekdrive User with Salesforce License, the system treats Files set in Salesforce screen as main. Settings such as User information which was edited in Fleekdrive screen are not reflected in Salesforce.

About User Information

- Please do not create System Authority which does not have an authority to modify in Salesforce such as edit authority for Username in Fleekdrive Custom System Authority.
-->It happens that edited Username is saved in Salesforce and not be saved in Fleekdrive for the System Authority authority error.
- If the Username is different between Salesforce and Fleekdrive, certification error will occur and Fleekdrive function of Salesforce will not be able to use.
-->In this case, please edit user information in Fleekdrive System Authority by user with access such as "System Administrator". It will become useable after Username is matched.
- Password for Salesforce and Fleekdrive are different.
-->To login from Fleekdrive, system administrator should reset password from Fleekdrive user management screen and notify the user.
- Please do not reset Fleekdrive security token while using Salesforce.
It controls by security token, not by password. Certification error will occur if the security token is different from Salesforce.

About the Display of Menu Screen

- The access right control of "Files", "Delivery", "Fleekdrive Trail", and "Fleekdrive Settings" menu tabs are set in Fleekdrive System Authority. Please adjust the menu tab display in Salesforce by Salesforce function.
- In Fleekdrive, it is possible to set Display/Undisplay in "Custom Tab Settings" through

Setup>Administration Setup>Manage Users>Profiles.

- Permission setting for displaying menu tab can be adjusted in [Fleekdrive Setting] tab >User Management>Fleekdrive System Authority Management, of Salesforce.

7.3. Using Safari

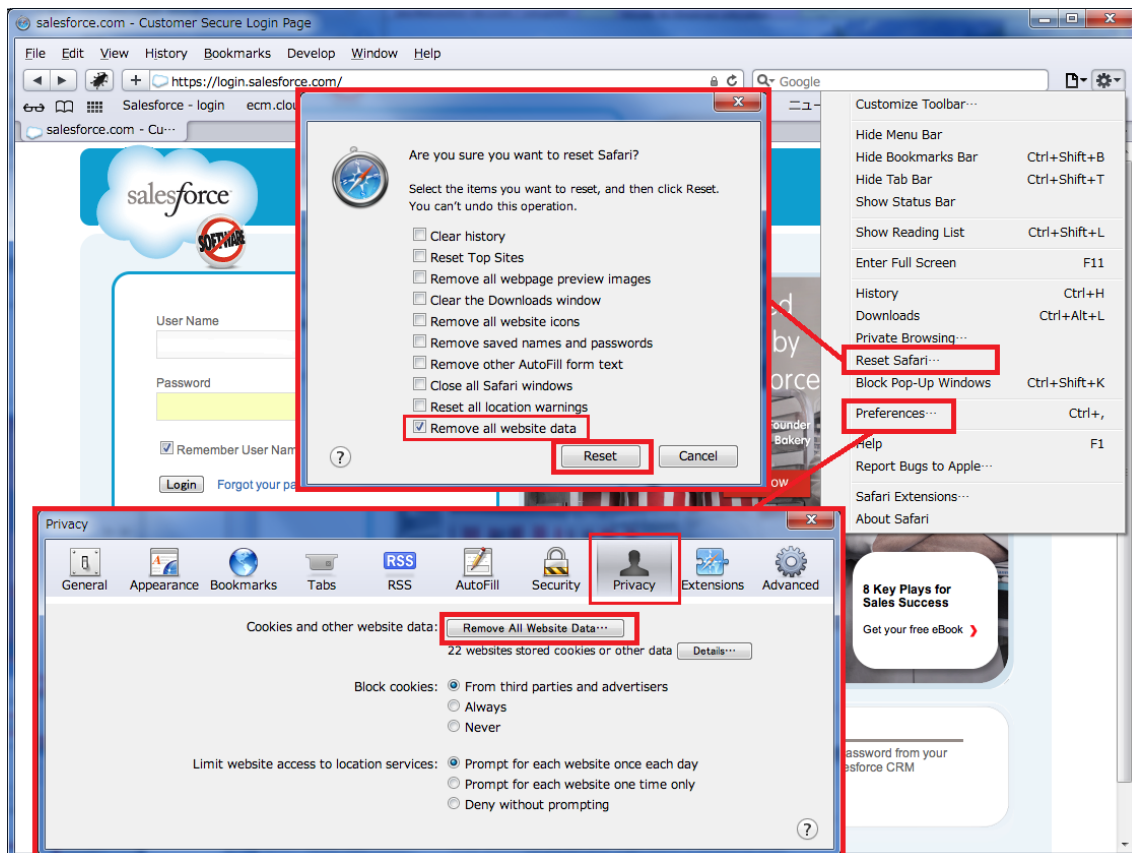
There's a case when Files management screen keeps on reloading in Safari.

In that case, please delete browser cache and Cookie.

- From "Reset Safari" of setting menu, verify and check "Remove All Website Data" and reset.

Otherwise,

- Press "Remove All Website Data" in privacy tab.



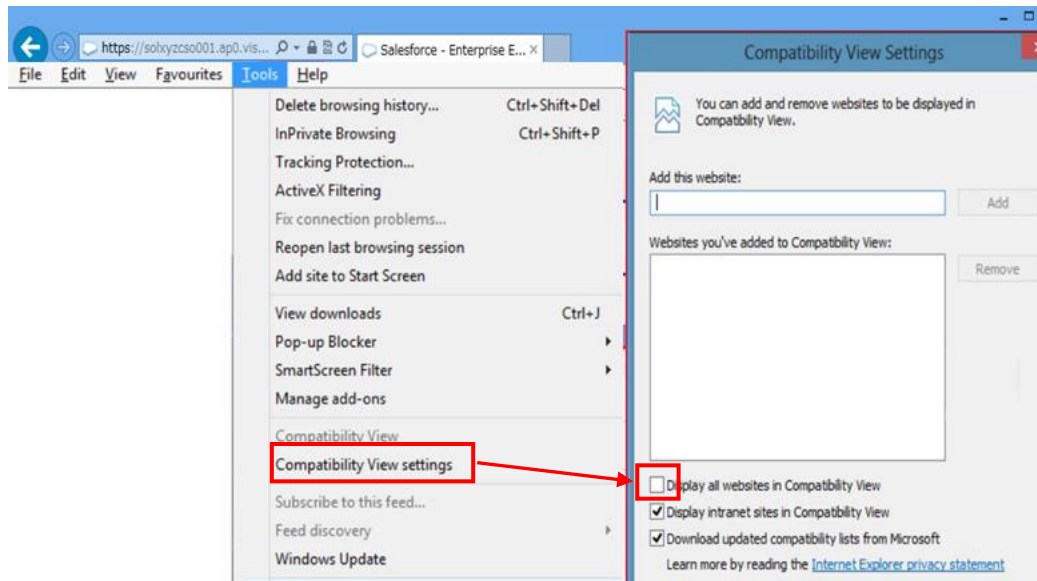
7.4. In case of using Internet Explorer

When using Fleekdrive functions of Salesforce with Internet Explorer, set the browser as follows to avoid the compatibility view.

- Menu bar: tool>Compatible view settings
- Uncheck "Display all webswites in Compatibility view".

When using Fleekdrive functions of Salesforce with Internet Explorer , set the browser as follows to avoid the compatibility view.

- Menu bar: tool > Compatible view settings
- Unlock "Display ass websites in Compatibility view".



7.5. About customization

Applications do not support calling and customizing other than provided by Fleekdrive's standard functions or APIs.

Revision History

Revision Date	Version Number	Revised Files	Reason for Revision
2017/3/4	1 st Edition	New Creation	New Creation •Created Fleekdrive installation and setting manual.
2017/7/22	2 nd Edition	Delete	Deleted the following description due to specification change of V1.0.5 release. •Method of setup selection (4.1.1.)
2017/12/29	3 rd Edition	Change	Changed the installation procedure due to renewal for App Exchange (2.1) Deleted the description of Customer Portal.
2021/3/10	4 th Edition	Change	Changed Community notation to Digital Experience due to name change in Salesforce (5.3.1)

Fleekdrive Installation Guide
4th Edition, March 10, 2021
Fleekdrive Co., Ltd.
<http://app.fleekdrive.com>

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