



# Fleekform

## Installation Guide

March 10, 2021  
4<sup>th</sup> Edition  
Fleekdrive Co., Ltd.

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## **1. Introduction**

Thank you for using Fleekform. Fleekform provides not only reporting features which are not fully supported in Salesforce, but it is also able to make various operations efficient, such as printing, PDF publishing, and document management with using Fleekdrive.

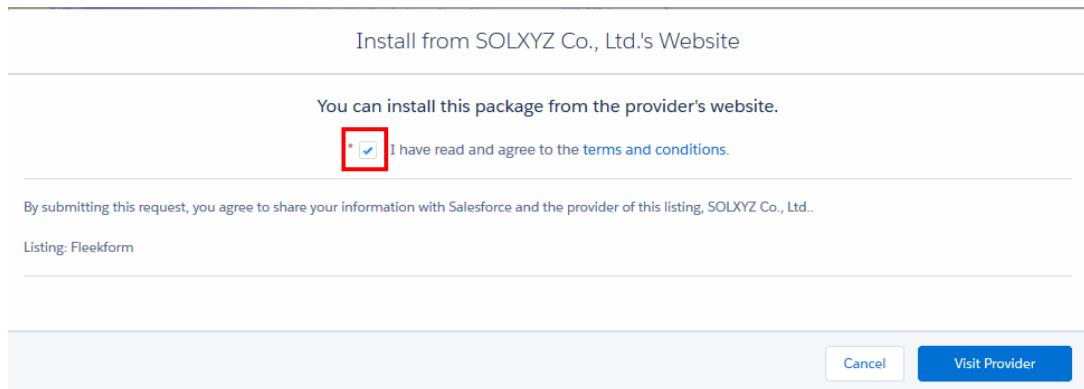
As Fleekform is an AppExchange Application, installing it to Salesforce is straightforward.

This document describes installation, configuration, and operation on Salesforce regarding Fleekform. Please refer to a separate document, Fleekform User Guide, on using Fleekform.

## 2. Installation

### 2.1. Installation

1. Open the AppExchange English website and search for 'Fleekform' and install this application.
2. Read the terms and conditions and select the check box ON, if you agree with it. Then press the "Install from provider's site" button to start the installation.



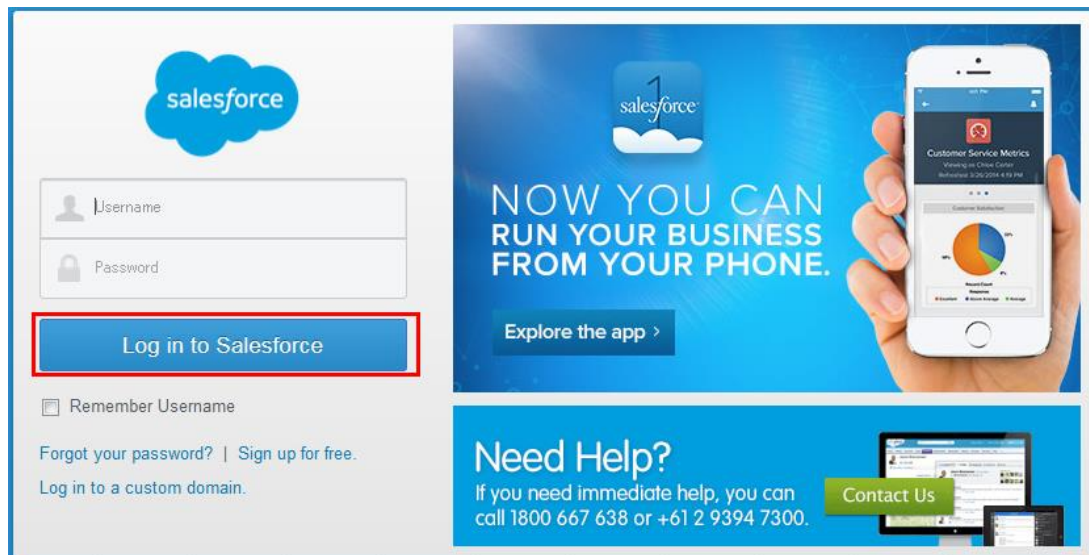
The screenshot shows the 'Install from SOLXYZ Co., Ltd.'s Website' page. It includes a heading 'Install from SOLXYZ Co., Ltd.'s Website', a sub-heading 'You can install this package from the provider's website.', a checkbox labeled 'I have read and agree to the terms and conditions.' (the checkbox is checked and highlighted with a red square), and a link to 'terms and conditions'. Below this is a disclaimer: 'By submitting this request, you agree to share your information with Salesforce and the provider of this listing, SOLXYZ Co., Ltd.. Listing: Fleekform'. At the bottom right are two buttons: 'Cancel' and 'Visit Provider'.

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



The screenshot shows a screen titled 'How would you like to continue ?'. It features two buttons: a green button labeled 'Install in production' with the subtext 'Includes active, trial or developer org', and a grey button labeled 'Install in Sandbox' with the subtext 'Test in a copy of your production org'.

4. The login page will be displayed. Login to Salesforce with user account that has 'System Administrator' profile Salesforce organization profile.



5. Package Installation Details page will be displayed.

Check in the box of 'Install for Specific Profiles' and remove the access authority of users who are not use Fleekform.

However, since Fleekform cannot be used unless licenses are set up in the later steps, there are no problems if you are select 'Install All Users'.

In this steps, if you select 'Install for Admins Only' the users other than the system administrator will have to settings manually.


☐ 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

No Access

Set

| Profile                | Access Level                                                    |
|------------------------|-----------------------------------------------------------------|
| System Administrator   | Full Access (Your profile must have full access to the package) |
| Standard Platform User | <div>No Access</div>                                            |

- Third Party Access approval page will be shown. Confirm its contents. Select 'Yes, grant access to these third-party web sites' and press 'Continue' button to continue 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?](#)

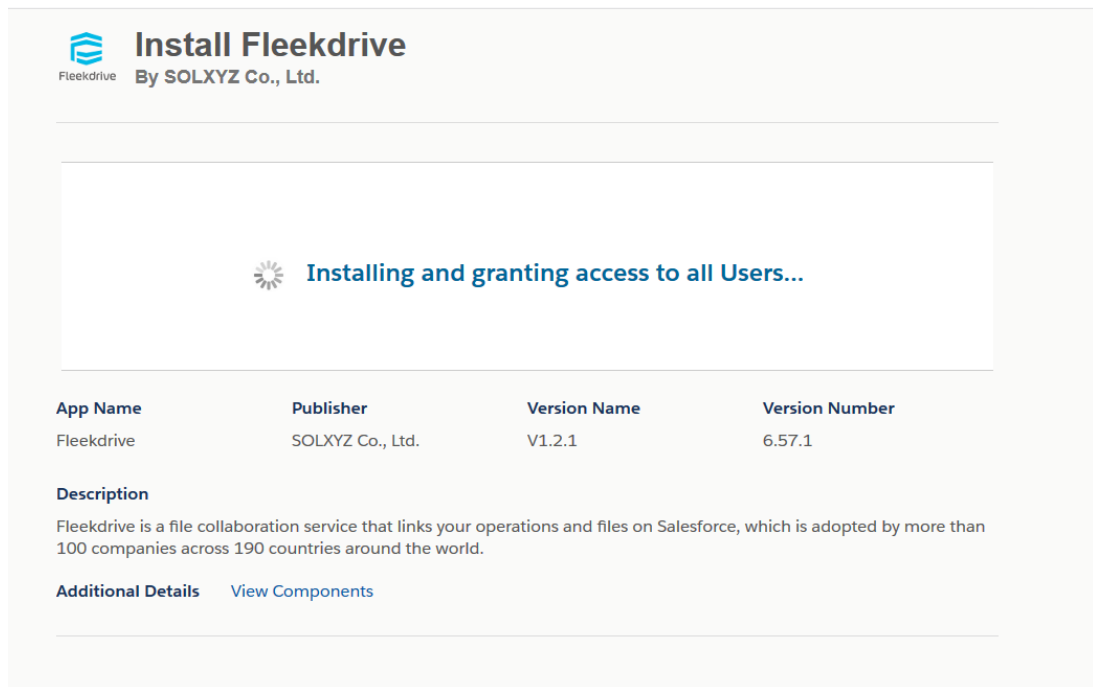
| Website                          | SSL Encrypted                       |
|----------------------------------|-------------------------------------|
| api.fleekform.com                | <input checked="" type="checkbox"/> |
| apps.fleekdrive.com              | <input checked="" type="checkbox"/> |
| ecm.cloudsharedoffice.com        | <input checked="" type="checkbox"/> |
| ecmpresf.cloudsharedoffice.com   | <input checked="" type="checkbox"/> |
| ecmsf.cloudsharedoffice.com      | <input checked="" type="checkbox"/> |
| webto.salesforce.com             | <input checked="" type="checkbox"/> |
| wrapi.cloudsharedoffice.com      | <input checked="" type="checkbox"/> |
| wrregister.cloudsharedoffice.com | <input checked="" type="checkbox"/> |
| www.salesforce.com               | <input checked="" type="checkbox"/> |

☒ Yes, grant access to these third-party web sites

Continue

Cancel

7. The processing screen will be displayed.



Installation will be completed about 8 to 10 minutes.

Users who have executed the installation will receive a notification message after the installation is completed.

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

Although the page will not be changed from 'In Progress', installation is already completed after the message described above is received.

8. Confirm 'Installed Packages' after receiving the message.

Menu: Setup > App Setup > Installed Packages

## 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**.

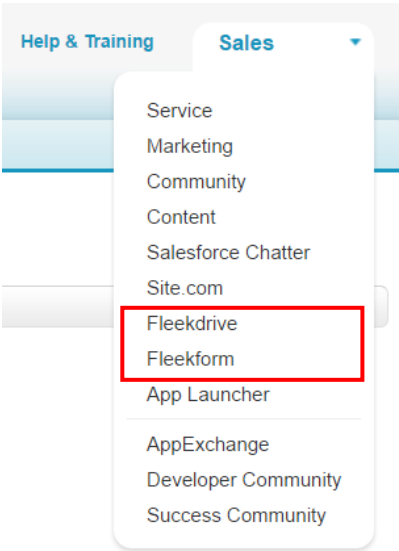
[Help for this Page](#)



| Installed Packages                                                                                                                                       |                      |           |                |                  |        |                  |               |                 |                  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|-----------|----------------|------------------|--------|------------------|---------------|-----------------|------------------|
| Action                                                                                                                                                   | Package Name         | Publisher | Version Number | Namespace Prefix | Status | Allowed Licenses | Used Licenses | Expiration Date | Install Date     |
| <a href="#">Uninstall</a>                                                                                                                                | Fleekdrive/Fleekform | 株式会社ソルグンズ | 2.0.10         | SOLXYZCS001      | Active | Unlimited        | 0             | Does not Expire | 2/7/2013 3:19 AM |
| <b>Description</b><br>・Salesforce帳票のPDF生成・送信履歴管理<br>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。<br>・Salesforce連携セキュリティECM<br>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                                                                                                                     |                      |           |                |                  |        |                  |               |                 |                  |

9. 'Fleekdrive' and

'Fleekform' will be added on 'Force.com application menu'.



### 3. Preparation Before Use

This chapter explains necessary initial configuration of installed Fleekform.

#### 3.1. Change the Layout Assignment of User Information

Open Salesforce profile list page by selecting Setup > Administration Setup > Manage Users > Profiles.

1. Select one of the profiles to be configured for the user to be able to use Fleekform 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 <span>New</span> |                                                  |                                  |                          |
|--------------------------|--------------------------------------------------|----------------------------------|--------------------------|
| Action                   | Name                                             | User License                     | Custom                   |
| <a href="#">Edit</a>     | <a href="#">Chatter External User</a>            | Chatter External                 | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Chatter Free User</a>                | Chatter Free                     | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Chatter Moderator User</a>           | Chatter Free                     | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Chatter Only User</a>                | Chatter Only                     | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Content Only User</a>                | Content Only                     | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Contract Manager</a>                 | Salesforce                       | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Customer Portal Manager</a>          | Customer Portal Manager          | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Customer Portal Manager Custom</a>   | Customer Portal Manager Custom   | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Customer Portal Manager Standard</a> | Customer Portal Manager Standard | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Customer Portal User</a>             | Customer Portal User             | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Force.com - One App User</a>         | Force.com - One App              | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Gold Partner User</a>                | Gold Partner                     | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">High Volume Customer Portal User</a> | High Volume Customer Portal      | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Knowledge Only User</a>              | Knowledge Only                   | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Marketing User</a>                   | Salesforce                       | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Read Only</a>                        | Salesforce                       | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Siteforce Only User</a>              | Siteforce Only                   | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Solution Manager</a>                 | Salesforce                       | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Standard Platform User</a>           | Salesforce Platform              | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">Standard User</a>                    | Salesforce                       | <input type="checkbox"/> |
| <a href="#">Edit</a>     | <a href="#">System Administrator</a>             | Salesforce                       | <input type="checkbox"/> |

2. Click 'View Assignment' under User Layout in the Standard Object Layouts field in Page Layouts.

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   | <input type="checkbox"/>                    |
| Created By   | 森田 雅彦         | 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<br><a href="#">[ View Assignment ]</a>                 | Event               | <a href="#">Event Layout</a><br><a href="#">[ View Assignment ]</a>               |
| Account          | <a href="#">Account Layout</a><br><a href="#">[ View Assignment ]</a>              | Lead                | <a href="#">Lead Layout</a><br><a href="#">[ View Assignment ]</a>                |
| Asset            | <a href="#">Asset Layout</a><br><a href="#">[ View Assignment ]</a>                | Opportunity         | <a href="#">Opportunity Layout</a><br><a href="#">[ View Assignment ]</a>         |
| Campaign         | <a href="#">Campaign Layout</a><br><a href="#">[ View Assignment ]</a>             | Opportunity Product | <a href="#">Opportunity Product Layout</a><br><a href="#">[ View Assignment ]</a> |
| Campaign Member  | <a href="#">Campaign Member Page Layout</a><br><a href="#">[ View Assignment ]</a> | Product             | <a href="#">Product Layout</a><br><a href="#">[ View Assignment ]</a>             |
| Case             | <a href="#">Case Layout</a><br><a href="#">[ View Assignment ]</a>                 | Solution            | <a href="#">Solution Layout</a><br><a href="#">[ View Assignment ]</a>            |
| Case Close       | <a href="#">Close Case Layout</a><br><a href="#">[ View Assignment ]</a>           | Task                | <a href="#">Task Layout</a><br><a href="#">[ View Assignment ]</a>                |
| Contact          | <a href="#">Contact Layout</a><br><a href="#">[ View Assignment ]</a>              | User                | <a href="#">User Layout</a><br><a href="#">[ View Assignment ]</a>                |
| Contract         | <a href="#">Contract Layout</a><br><a href="#">[ View Assignment ]</a>             |                     |                                                                                   |

#### Custom Object Layouts

### 3. Click 'Edit Assignment' button.

Page Layout Assignment

[Help for this Page](#)

## User

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

| <a href="#">Edit Assignment</a>  |                             |
|----------------------------------|-----------------------------|
| Profiles                         | Page Layout                 |
| Chatter Only User                | <a href="#">User Layout</a> |
| Content Only User                | <a href="#">User Layout</a> |
| Contract Manager                 | <a href="#">User Layout</a> |
| Customer Portal Manager          | <a href="#">User Layout</a> |
| Customer Portal Manager Custom   | <a href="#">User Layout</a> |
| Customer Portal Manager Standard | <a href="#">User Layout</a> |
| Customer Portal User             | <a href="#">User Layout</a> |
| Force.com - One App User         | <a href="#">User Layout</a> |
| Gold Partner User                | <a href="#">User Layout</a> |
| High Volume Customer Portal User | <a href="#">User Layout</a> |
| Knowledge Only User              | <a href="#">User Layout</a> |
| Marketing User                   | <a href="#">User Layout</a> |
| Read Only                        | <a href="#">User Layout</a> |
| Siteforce Only User              | <a href="#">User Layout</a> |
| Solution Manager                 | <a href="#">User Layout</a> |
| Standard Platform User           | <a href="#">User Layout</a> |
| Standard User                    | <a href="#">User Layout</a> |
| System Administrator             | <a href="#">User Layout</a> |
| <a href="#">Edit Assignment</a>  |                             |

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

5. Click “Save” after editing page layout assignment.

- You will notice that the item configuration for Fleekform has been added, if you check the personal information through selecting Setup > Administration Setup > Manage Users > Users in the list, or Setup > Personal Setup > My Personal Information > Personal Information menu. Notice that all fields are blank as default.

User: **Anney Shirley** [Edit Layout](#) | [User Profile](#) | [Help for this Page](#)

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

### User Detail

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

|                                 |                                                    |                                                       |                                     |
|---------------------------------|----------------------------------------------------|-------------------------------------------------------|-------------------------------------|
| Name                            | Anney Shirley                                      | Role                                                  | Salesforce                          |
| Alias                           | Anne                                               | User License                                          | Salesforce                          |
| Email                           | hyamabe@sof3.splinx.co.jp                          | Profile                                               | System Administrator                |
| Username                        | anney.shirley@pack-dev.com                         | Active                                                | <input checked="" type="checkbox"/> |
| Nickname                        | Anney Shirley (3)                                  | Marketing User                                        | <input type="checkbox"/>            |
| Title                           |                                                    | Offline User                                          | <input type="checkbox"/>            |
| Company                         |                                                    | Knowledge User                                        | <input type="checkbox"/>            |
| Department                      |                                                    | Force.com Flow User                                   | <input type="checkbox"/>            |
| Division                        |                                                    | Service Cloud User                                    | <input type="checkbox"/>            |
| Address                         |                                                    | Site.com Contributor User                             | <input type="checkbox"/>            |
| Time Zone                       | (GMT-05:00) Eastern Standard Time (America/Panama) | Site.com Publisher User                               | <input type="checkbox"/>            |
| Locale                          | English (United States)                            | Salesforce Classic User                               | <input type="checkbox"/>            |
| Language                        | English                                            | Mobile Configuration                                  |                                     |
| Delegated Approver              |                                                    | Accessibility Mode                                    | <input type="checkbox"/>            |
| Manager                         |                                                    | Color-Blind Palette on Charts                         | <input type="checkbox"/>            |
| Receive Approval Request Emails | Only if I am an approver                           | Send Apex Warning Emails                              | <input type="checkbox"/>            |
| Newsletter                      | <input type="checkbox"/>                           | Salesforce CRM Content User                           | <input checked="" type="checkbox"/> |
| Admin Newsletter                | <input checked="" type="checkbox"/>                | Receive Salesforce CRM Content Email Alerts           | <input checked="" type="checkbox"/> |
| Federation ID                   |                                                    | Receive Salesforce CRM Content Alerts as Daily Digest | <input checked="" type="checkbox"/> |
|                                 |                                                    | Make Setup My Default Landing Page                    | <input type="checkbox"/>            |
|                                 |                                                    | Force.com Quick Access Menu                           | <input checked="" type="checkbox"/> |
|                                 |                                                    | Development Mode                                      | <input type="checkbox"/>            |
|                                 |                                                    | Show View State in Development Mode                   | <input type="checkbox"/>            |
|                                 |                                                    | Allow Forecasting                                     | <input type="checkbox"/>            |
|                                 |                                                    | Call Center                                           |                                     |
|                                 |                                                    | Phone                                                 |                                     |
|                                 |                                                    | Extension                                             |                                     |
|                                 |                                                    | Fax                                                   |                                     |
|                                 |                                                    | Mobile                                                |                                     |
|                                 |                                                    | Email Encoding                                        | Japanese (JIS)                      |
|                                 |                                                    | Employee Number                                       |                                     |
|                                 |                                                    | Used Data Space                                       | 0 B <a href="#">View</a>            |
|                                 |                                                    | Used File Space                                       | 0 B <a href="#">View</a>            |
|                                 |                                                    | Last Login                                            |                                     |
|                                 |                                                    | Last Password Change or Reset                         | 7/17/2013 5:20 PM                   |
| Created By                      | Hiroko Yamabe, 7/17/2013 5:20 PM                   | Modified By                                           | Hiroko Yamabe, 7/17/2013 5:20 PM    |

▼ Fleekdrive/Fleekform

|                                                           |                                                  |
|-----------------------------------------------------------|--------------------------------------------------|
| Yomi(Last)                                                | Fleekdrive System Authority                      |
| Yomi(First)                                               | Fleekdrive Active <input type="checkbox"/>       |
| Home Space                                                | Lock <input type="checkbox"/>                    |
| Fleekdrive Chatter <input type="checkbox"/>               |                                                  |
| Used Disk                                                 | Available Disk Space(GB) <a href="#">View</a>    |
| Used Delivery                                             | Available Delivery Size(GB) <a href="#">View</a> |
| Activate Disk Space Threshold <input type="checkbox"/>    | Disk Space Threshold                             |
|                                                           | Disk Space Threshold Unit                        |
| Activate Delivery Size Threshold <input type="checkbox"/> | Delivery Size Threshold                          |
|                                                           | Delivery Size Threshold Unit                     |
| Activate Fleekform <input type="checkbox"/>               |                                                  |

Custom Link

[Fleekdrive System Authority](#) [Fleekdrive Groups](#)

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

### 3.2. Translation Configuration

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

Activate the translation setting by following the steps enumerated below in order to display CSO menu in the language specified by Salesforce personal configuration.

1. Select Setup > Administration Setup > Translation Workbench > Translation Settings.  
Although English and Chinese (Simplified Chinese) are added as default setting, they are

not activated yet (check box is still unchecked).

## 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  |                      | <a href="#">Add</a>                 |               |
|----------------------|----------------------|-------------------------------------|---------------|
| Action               | Language             | Active                              | Translator(s) |
| <a href="#">Edit</a> | English              | <input type="checkbox"/>            |               |
| <a href="#">Edit</a> | Japanese             | <input checked="" type="checkbox"/> |               |
| <a href="#">Edit</a> | Chinese (Simplified) | <input type="checkbox"/>            |               |

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

2. In case the user configures to use English or Chinese (Simplified Chinese), CSO menu will still be displayed in Japanese since translation is not activated by default.  
Activate the setting by following the steps.

(1) Select 'Edit' for '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  |                      | <a href="#">Add</a>                 |               |
|----------------------|----------------------|-------------------------------------|---------------|
| Action               | Language             | Active                              | Translator(s) |
| <a href="#">Edit</a> | English              | <input type="checkbox"/>            |               |
| <a href="#">Edit</a> | Japanese             | <input checked="" type="checkbox"/> |               |
| <a href="#">Edit</a> | Chinese (Simplified) | <input type="checkbox"/>            |               |

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

(2)Tick 'Active' and save. It is not necessary to check the translators setting below.

Translation Workbench [Help for this Page](#)

### Edit Language

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: 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  
Chris Niven Meneses  
Christine Bandalan  
Christopher Williams  
CustomProfile Yamabe  
Emily Brown  
Franco Sioquim  
Hannah Jones  
Hiroko Yamabe

Add

Remove

**Selected List**  
--None--

Save

Cancel

(3)Activate Chinese (Simplified Chinese) as well.

3. Activated languages are displayed like shown below.

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

If another 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) |
|----------------------|----------------------|-------------------------------------|---------------|
| <a href="#">Edit</a> | English              | <input checked="" type="checkbox"/> |               |
| <a href="#">Edit</a> | Japanese             | <input checked="" type="checkbox"/> |               |
| <a href="#">Edit</a> | Chinese (Simplified) | <input checked="" type="checkbox"/> |               |

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

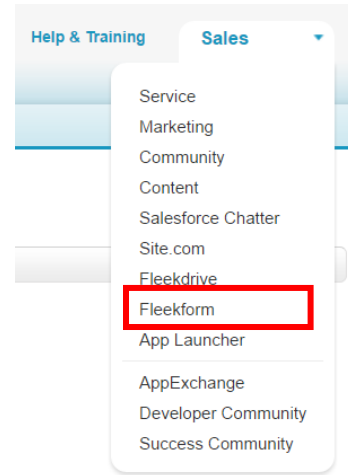
\* Added languages will not be possible to delete. Uncheck the check box of unnecessary language in edit page.

## 4. Setting

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

### 4.1. Fleekform System Administrator Configuration

1. Go to Fleekform page by selecting 'Fleekform' from drop-down menu of 'force.com Application Menu'.



2. Initial configuration for Fleekform will be started by selecting either 'Form Manager' tab or 'Fleekform Settings' tab.



#### 4.1.1. Method of setup selection

Please refer to the selection for new application or reset-up using security token

 Free trial for 30 days



#### 4.1.2. Fill-in Trial User Information

1. You will find the link of "Privacy Policy" on the lower left corner of the screen, please select the check mark if you agree with the terms and conditions. If you agree, click "Accept the usage of a personal information and confirm" button.



Confirmation of applying for WebReport

## 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                  | United States ▼ |
| Zip/Postal Code          | 000-0000        |
| State/Province           | tokyo           |
| City                     | minatoku        |
| Street                   | mita            |
| Phone                    | 03-000-000      |
| FAX                      |                 |
| Organization ID          | 00D10000000ZxVJ |

| Personal Information |                   |
|----------------------|-------------------|
| Family Name          | CSO               |
| First Name           | kato              |
| Department           | CSO               |
| User ID              | kkatou@86demo.com |
| Email                |                   |

| Service     |                                                                                |
|-------------|--------------------------------------------------------------------------------|
| File format | <input type="checkbox"/> PDF <input checked="" type="checkbox"/> EXCEL (.xlsx) |

| Other                                  |                   |
|----------------------------------------|-------------------|
| Requirements, problems or inspections. |                   |
| Introduction and consideration time    | -Please select- ▼ |

☒ Please check if you regard to the Agreements.  
About the usage of your personal information we have.

Accept the usage of a personal infor

- Application has been completed.



Confirmation of applying for WebReport

## Free trial for 30 days



Thank you for your trial.

Start

### 4.1.3. 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.

 **Free trial for 30 days**

Organization Name **86demo.com** Authentication

Please execute the confirmation of initial users.

User ID **kkatou@86demo.com**

Security Token

Authentication

## 4.2. Other Required Configuration before Using Fleekform

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

### 4.2.1. Edit of User's Fleekform Configuration

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

ECM and WR isActive

Help for this Page ?

View: **ECM and WR isActive** Edit | Create New View

<Previous Page | Next Page>

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                          | Full Name                  | Username                           | Last Login | Role          | Active | Profile                  | ECM Active | ECM Profile Name     | Activate WebReport       |
|---------------------------------|----------------------------|------------------------------------|------------|---------------|--------|--------------------------|------------|----------------------|--------------------------|
| <input type="checkbox"/>   Edit | Anderson, Nicholas         | officenv_009@62demo.com            |            | NY Employee   | ✓      | Force.com - One App User |            |                      |                          |
| <input type="checkbox"/>   Edit | <b>Bandalan, Christine</b> | bandalan.cd_cso.man@sprasia.com.ph |            | Alfa Co. Ltd. | ✓      | System Administrator     | ✓          | System Administrator | ✓                        |
| <input type="checkbox"/>   Edit | Brown, Emily               | officenv_004@62demo.com            |            | NY Employee   | ✓      | Force.com - One App User |            |                      |                          |
| <input type="checkbox"/>   Edit | Davis, Kaitlyn             | officenv_007@62demo.com            |            | NY Employee   | ✓      | Force.com - One App User |            |                      |                          |
| <input type="checkbox"/>   Edit | Force.com_OneApp01         | oneapp01@62demo.com                |            |               | ✓      | Force.com - One App User | ✓          | 標準ユーザ                | <input type="checkbox"/> |
| <input type="checkbox"/>   Edit | Force.com_OneApp02         | oneapp02@62demo.com                |            |               | ✓      | Force.com - One App User |            |                      |                          |
| <input type="checkbox"/>   Edit | Force.com_OneApp03         | oneapp03@solxyz.co.jp              |            |               | ✓      | Force.com - One App User |            |                      |                          |
| <input type="checkbox"/>   Edit | Force.com_OneApp04         | oneapp04@solxyz.co.jp              |            |               | ✓      | Force.com - One App User |            |                      |                          |
| <input type="checkbox"/>   Edit | Force.com_OneApp05         | oneapp05@solxyz.co.jp              |            |               | ✓      | Force.com - One App User |            |                      |                          |
| <input type="checkbox"/>   Edit | Force.com_OneApp06         | oneapp06@62demo.com                |            |               | ✓      | Force.com - One App User |            |                      |                          |

Show me **more** records per list page

New User Reset Password(s) Add Multiple Users

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**

<Previous Page | Next Page>

View user to check or edit items for Fleekform.

### CSO Layout Setting Items:

|                                  |                                                                 |
|----------------------------------|-----------------------------------------------------------------|
| Yomi(Last)                       | Default is blank. It will be more accurate to sort user name on |
| Yomi(First)                      | CSO if set. Please set as you need.                             |
| Fleekdrive system authority Name | * Not used for Fleekform.                                       |

|                               |                                                                                                                                                                                                                                                                                                                        |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fleekdrive Active             | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Fleekdrive Chatter            | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Home Space                    | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Lock                          | Unticked as default setting. You cannot change your own lock setting.                                                                                                                                                                                                                                                  |
|                               | If ticked, the user can no longer use the Fleekform. Unlike CSO lock behavior, stored data and configuration in Fleekform will remain. It will be active if unticked.                                                                                                                                                  |
| Available Disk Space(GB)      | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Activate Disk Space Threshold | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Used Disk                     | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Disk Size                     | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Used Delivery                 | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Delivery Size                 | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Activate Disk Space Threshold | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Available Disk Space(GB)      | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Activate Disk Space Unit      | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Delivery Size Threshold       | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Delivery Size Threshold Unit  | * Not used for Fleekform.                                                                                                                                                                                                                                                                                              |
| Fleekform Active              | If ticked, Fleekform is activated.<br>You cannot change your own setting.                                                                                                                                                                                                                                              |
|                               | The user is created in Fleekform the first time Fleekform is activated.<br><u>* Ensure that the user logged-in using Salesforce to create a user has Fleekform enabled.</u><br><u>(If the user logged-in to create a user does not have Fleekform enabled, the created user also does not have Fleekform enabled.)</u> |
|                               | If unticked, Fleekform will be deactivated for the user already using it and will not be able to use it.                                                                                                                                                                                                               |

Custom Link:

|                             |                           |
|-----------------------------|---------------------------|
| Fleekdrive System Authority | *Unusable on Fleekform    |
| Fleekdrive Groups           | * Not used for Fleekform. |

User: **Anney Shirley** [Edit Layout](#) [User Profile](#) [Help for this Page](#)

[Permissions Set Assignments \(2\)](#) | [Personal Groups \(2\)](#) | [Public Group Membership \(2\)](#) | [Queue Membership \(2\)](#) | [Managers in the Role Hierarchy \(2\)](#) | [OAuth Connected Apps \(2\)](#) | [Third-Party Account Links \(2\)](#) | [Login History \(2\)](#)

### User Detail

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

|                                  |                                                                            |                                                       |                                            |
|----------------------------------|----------------------------------------------------------------------------|-------------------------------------------------------|--------------------------------------------|
| Name                             | Anney Shirley                                                              | Role                                                  |                                            |
| Alias                            | Anne                                                                       | User License                                          | Salesforce                                 |
| Email                            | <a href="mailto:nyamabe@accl3.solvit.co.jp">nyamabe@accl3.solvit.co.jp</a> | Profile                                               | <a href="#">System Administrator</a>       |
| Username                         | anney.shirley@paci-dev.com                                                 | Active                                                | <input checked="" type="checkbox"/>        |
| Nickname                         | Anney Shirley <a href="#">i</a>                                            | Marketing User                                        | <input type="checkbox"/>                   |
| Title                            |                                                                            | Offline User                                          | <input type="checkbox"/>                   |
| Company                          |                                                                            | Knowledge User                                        | <input type="checkbox"/>                   |
| Department                       |                                                                            | Force.com Flow User                                   | <input type="checkbox"/>                   |
| Division                         |                                                                            | Service Cloud User                                    | <input type="checkbox"/>                   |
| Address                          |                                                                            | Site.com Contributor User                             | <input type="checkbox"/>                   |
| Time Zone                        | (GMT-05:00) Eastern Standard Time (America/Panama)                         | Site.com Publisher User                               | <input type="checkbox"/>                   |
| Locale                           | English (United States)                                                    | Salesforce Classic User                               | <input type="checkbox"/>                   |
| Language                         | English                                                                    | Mobile Configuration                                  |                                            |
| Delegated Approver               |                                                                            | Accessibility Mode                                    | <input type="checkbox"/> <a href="#">i</a> |
| Manager                          |                                                                            | Color-Blind Palette on Charts                         | <input type="checkbox"/> <a href="#">i</a> |
| Receive Approval Request Emails  | Only if I am an approver                                                   | Send Apex Warning Emails                              | <input type="checkbox"/>                   |
| Newsletter                       | <input type="checkbox"/>                                                   | Salesforce CRM Content User                           | <input checked="" type="checkbox"/>        |
| Admin Newsletter                 | <input checked="" type="checkbox"/>                                        | Receive Salesforce CRM Content Email Alerts           | <input checked="" type="checkbox"/>        |
| Federation ID                    |                                                                            | Receive Salesforce CRM Content Alerts as Daily Digest | <input checked="" type="checkbox"/>        |
|                                  |                                                                            | Make Setup My Default Landing Page                    | <input type="checkbox"/>                   |
|                                  |                                                                            | Force.com Quick Access Menu                           | <input checked="" type="checkbox"/>        |
|                                  |                                                                            | Development Mode                                      | <input type="checkbox"/>                   |
|                                  |                                                                            | Show View State in Development Mode                   | <input type="checkbox"/>                   |
|                                  |                                                                            | Allow Forecasting                                     | <input type="checkbox"/>                   |
|                                  |                                                                            | Call Center                                           |                                            |
|                                  |                                                                            | Phone                                                 |                                            |
|                                  |                                                                            | Extension                                             |                                            |
|                                  |                                                                            | Fax                                                   |                                            |
|                                  |                                                                            | Mobile                                                |                                            |
|                                  |                                                                            | Email Encoding                                        | Japanese (JIS)                             |
|                                  |                                                                            | Employee Number                                       |                                            |
|                                  |                                                                            | Used Data Space                                       | 0 B <a href="#">View</a>                   |
|                                  |                                                                            | Used File Space                                       | 0 B <a href="#">View</a>                   |
|                                  |                                                                            | Last Login                                            |                                            |
|                                  |                                                                            | Last Password Change or Reset                         | 7/17/2013 5:20 PM                          |
| Created By                       | <a href="#">Hiroko Yamabe</a> , 7/17/2013 5:20 PM                          |                                                       |                                            |
| Modified By                      | <a href="#">Hiroko Yamabe</a> , 7/17/2013 5:20 PM                          |                                                       |                                            |
| Yomi(Last)                       | Fleekdrive System Authority                                                |                                                       |                                            |
| Yomi(First)                      | Fleekdrive Active                                                          |                                                       |                                            |
| Home Space                       | Lock                                                                       |                                                       |                                            |
| Fleekdrive Chatter               | <input type="checkbox"/>                                                   |                                                       |                                            |
| Used Disk                        | Available Disk Space(GB) <a href="#">i</a>                                 |                                                       |                                            |
| Used Delivery                    | Available Delivery Size(GB) <a href="#">i</a>                              |                                                       |                                            |
| Activate Disk Space Threshold    | Disk Space Threshold                                                       |                                                       |                                            |
| Activate Delivery Size Threshold | Disk Space Threshold Unit                                                  |                                                       |                                            |
|                                  | Delivery Size Threshold                                                    |                                                       |                                            |
|                                  | Delivery Size Threshold Unit                                               |                                                       |                                            |
| Activate Fleekform               | <input checked="" type="checkbox"/>                                        |                                                       |                                            |

#### 4.2.2. Assigning Fleekform Administrator Authority

This section shall describe how to assign necessary Fleekform administrator authority to the system administrator.

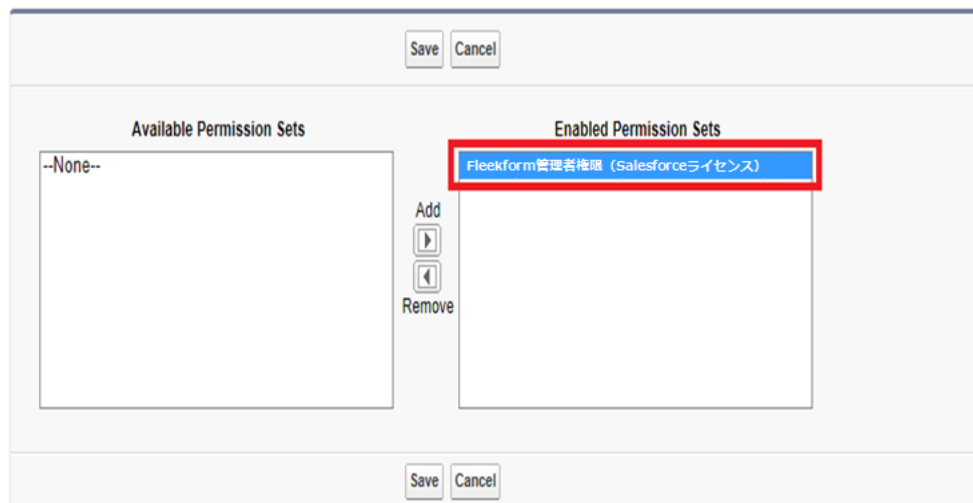
1. Select user from Setup > Administration Setup > Manage Users > Users, open the 'User

Detail' screen, then click the [Edit Assignments] button under 'Permission Set Assignments'.

2. Select and add 'Fleekform 管理者権限(Salesforce ライセンス)' from 'Available Permission Sets' to 'Enabled Permission Sets', then press the.

\* The display label for Fleekform will be different by license agreement.

Permission Set Assignments  
Christine Bandalan



#### 4.3. Granting Customer Portal Users Usage of Fleekform Menu

This section describes the required items to configure in case of sharing Fleekform menu with users of Salesforce customer portal.

##### 4.3.1. Customer Portal Settings

Customer settings need to be created beforehand through Salesforce Setup > App Setup > Customize > Customer Portal > Settings menu.

Create a 'Portal' corresponding to your environment.

##### 4.3.2. Fleekform Tab Display Settings

1. Check the existing portal setting through Salesforce Setup > App Setup > Customize > Customer Portal > Settings menu.

Customer Portal Setup

[Help for this Page](#)

| Portals                      |                     |               |                                                    |                                                    |
|------------------------------|---------------------|---------------|----------------------------------------------------|----------------------------------------------------|
| <a href="#">New</a>          |                     |               |                                                    |                                                    |
| <a href="#">Portals Help</a> |                     |               |                                                    |                                                    |
| Action                       | Name                | Login Enabled | Created By                                         | Modified By                                        |
| <a href="#">Edit</a>         | カスタマーポータル           | ✓             | <a href="#">Yasuteru Fujita</a> , 9/4/2012 2:43 PM | <a href="#">Yasuteru Fujita</a> , 9/4/2012 2:43 PM |
| <a href="#">Edit</a>         | ECM Customer Portal | ✓             | <a href="#">Hiroko Yamabe</a> , 2/8/2013 4:37 PM   | <a href="#">Hiroko Yamabe</a> , 2/8/2013 4:37 PM   |

2. Click 'Customize Portal Tabs' on top right of the page.

Customer Portal  
ECM Customer Portal Help for this Page

Customize the settings for your Customer Portal.

Portal Settings **Share Group Settings**

---

**Portal Detail** Edit Change Portal Fonts and Colors **Customize Portal Tabs**

|               |                                     |                  |                                                            |
|---------------|-------------------------------------|------------------|------------------------------------------------------------|
| Name          | ECM Customer Portal                 |                  |                                                            |
| Description   | Customer Portal for CSO/ECM         |                  |                                                            |
| Login Enabled | <input checked="" type="checkbox"/> |                  |                                                            |
| Administrator | <a href="#">Hiroko Yamabe</a>       |                  |                                                            |
| Portal ID     | 0601000000HQES                      |                  |                                                            |
| Created By    | <a href="#">Hiroko Yamabe</a>       | 2/8/2013 4:37 PM | Modified By <a href="#">Hiroko Yamabe</a> 2/8/2013 4:37 PM |

---

**Portal Default Settings**

Login URL [https://ap.salesforce.com/secur/login\\_portal.jsp?orgid=00D10000000KDUE&portalid=06010000000HQES](https://ap.salesforce.com/secur/login_portal.jsp?orgid=00D10000000KDUE&portalid=06010000000HQES)

Logout URL

Enable Self-Close Case from Suggested Solutions ☐

Show Action Confirmation ☐

HTML Messages Default Language English

3. Add tab by selecting tab to be added in custom portal page.

Portal Tab Set Editor  
ECM Customer Portal

Save Cancel

Choose the Tabs

**Available Tabs**

- Documents
- Reports
- Solutions
- Libraries
- Content
- Subscriptions
- Ideas
- Data.com
- Old CSO Tab1(Unused)
- Settings
- Old CSO Tab2(Unused)
- ReportDefinition**
- ReportOutputHistory

1 - Select

**Selected Tabs**

- Home
- ECM Contents
- ECM Delivery
- ECM Workflow
- ECM Trail
- ECM Settings

2

Add Remove

Up ▲ ▼ Down

Default Landing Tab Home

3

Save Cancel

4. Open the custom object edit page by selecting 'Edit' for 'Report Definition' and the other Custom Object used in customer portal from Setup > App Setup > Create > Objects.

|                         |            |                               |   |                              |
|-------------------------|------------|-------------------------------|---|------------------------------|
| Edit                    | 型定義        | CloudSharedOffice             | ✓ | SFDCオブジェクトとオーバーレイの型のマッピングを管理 |
| Edit                    | 外部ユーザ      | CloudSharedOffice             | ✓ | 外部サービスユーザ                    |
| Edit                    | 帳票クラウド設定   | CloudSharedOffice             | ✓ | リストで保持する必要のない設定              |
| Edit                    | 帳票作成履歴     | CloudSharedOffice Opportunity | ✓ | 帳票作成履歴                       |
| Edit                    | 帳票出力オブジェクト | CloudSharedOffice             | ✓ | 帳票出力の対象オブジェクト                |
| Edit                    | 帳票出力レコード履歴 | CloudSharedOffice             | ✓ | 帳票の出力履歴を管理                   |
| Edit                    | 帳票出力履歴     | CloudSharedOffice             | ✓ |                              |
| Edit                    | 帳票定義       | CloudSharedOffice             | ✓ | 帳票出力の対象オブジェクト                |
| Edit - Record 23 - 帳票定義 | 帳票定義       | CloudSharedOffice 帳票定義        | ✓ | 帳票定義の項目変更履歴を管理               |
| Edit                    | 振込先        | CloudSharedOffice             | ✓ | 振込先の口座情報                     |
| Edit                    | 消費税体系      | CloudSharedOffice             | ✓ | 消費税                          |

Check 'Available for Customer Portal' under 'Optional Features' and save.

Edit Custom Object  
帳票定義 (Managed) [Help for this Page](#)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

### Custom Object Definition Edit

Save Save & New Cancel

#### Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

#### Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Data Type

#### Optional Features

☐ Allow Reports

☐ Allow Activities

☒ Available for Customer Portal

☒ Track Field History

#### Deployment Status

[What is this?](#)

☐ In Development

☒ Deployed

Save Save & New Cancel

5. Activate Custom Object authorities of Custom Object used in 'Report Definition' of profile assignment of Customer Portal Manager user and other customer portal, by selecting Setup > Administration Setup > Manage Users > Profiles menu.

|      |                                  |                                  |                          |
|------|----------------------------------|----------------------------------|--------------------------|
| Edit | Chatter Only User                | Chatter Only                     | <input type="checkbox"/> |
| Edit | Content Only User                | Content Only                     | <input type="checkbox"/> |
| Edit | Contract Manager                 | Salesforce                       | <input type="checkbox"/> |
| Edit | Customer Portal Manager          | Customer Portal Manager          | <input type="checkbox"/> |
| Edit | Customer Portal Manager Custom   | Customer Portal Manager Custom   | <input type="checkbox"/> |
| Edit | Customer Portal Manager Standard | Customer Portal Manager Standard | <input type="checkbox"/> |
| Edit | Customer Portal User             | Customer Portal User             | <input type="checkbox"/> |
| Edit | Force.com - One App User         | Force.com - One App              | <input type="checkbox"/> |
| Edit | Gold Partner User                | Gold Partner                     | <input type="checkbox"/> |
| Edit | High Volume Customer Portal User | High Volume Customer Portal      | <input type="checkbox"/> |

Open configuration page for profile assignment of customer portal user.

**Standard Object Permissions**

|           | Basic Access                        |                                     |                                     |        | Data Administration |            |
|-----------|-------------------------------------|-------------------------------------|-------------------------------------|--------|---------------------|------------|
|           | Read                                | Create                              | Edit                                | Delete | View All            | Modify All |
| Accounts  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |        |                     |            |
| Assets    | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |        |                     |            |
| Cases     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |        |                     |            |
| Contacts  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |        |                     |            |
| Documents | <input checked="" type="checkbox"/> |                                     |                                     |        |                     |            |

**Custom Object Permissions**

|                  | Basic Access             |                          |                          |                          | Data Administration |            |
|------------------|--------------------------|--------------------------|--------------------------|--------------------------|---------------------|------------|
|                  | Read                     | Create                   | Edit                     | Delete                   | View All            | Modify All |
| ReportDefinition | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                     |            |

Configure authorities for customer portal user to access.

6. Depending on profiles, there are times when reference authority of item of object is not granted.
- Click 'View' beside object name to use for 'Custom Field-Level Security' of customer portal from Setup>Administrator Setup>Manage Users>Profiles and select check mark 'Visible' on detail page.

ReportDefinition Field-Level Security for profile  
High Volume Customer Portal User

[Edit](#) [Back to Profile](#)

| Field Name                | Field Type     | Visible                             | Read-Only                           |
|---------------------------|----------------|-------------------------------------|-------------------------------------|
| Created By                | Lookup         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Error/Means               | Long Text Area | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Last Modified By          | Lookup         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| OverlayVersion            | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| OverlayVersionMismatchFlg | Checkbox       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Owner                     | Lookup         | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| ReportDefinition Name     | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| アクセスビリティ許可                | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| アセンブリ許可                   | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| オブジェクト                    | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| オブジェクトID                  | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| オーバーレイ                    | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| オーバーレイID                  | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| コピー許可                     | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| セキュリティレベル                 | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| パスワード                     | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| フォームフィールド入力許可             | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| ページ抽出許可                   | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| マスターパスワード                 | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 印刷許可                      | Text           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 最終更新日時                    | Date/Time      | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 有効                        | Checkbox       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 権限 (グループ)                 | Long Text Area | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

Do not forget to mark items referred on outputting report.

7. Please set 'Default On' for tab displaying for adding on customer portal page which was set at step 3 through Profile Detail>Tab Settings.

## Tab Settings

### Standard Tab Settings

|            |             |               |             |
|------------|-------------|---------------|-------------|
| Home       | Default On  | Libraries     | Default On  |
| Cases      | Default On  | Products      | Default On  |
| Content    | Default On  | Reports       | Default Off |
| Dashboards | Default Off | Site.com      | Default On  |
| Data.com   | Default Off | Solutions     | Default On  |
| Documents  | Default On  | Subscriptions | Default On  |
| Ideas      | Default On  |               |             |

### Custom Tab Settings

|                      |            |                      |            |
|----------------------|------------|----------------------|------------|
| ECM Contents         | Default On | Old CSO Tab2(Unused) | Default On |
| ECM Delivery         | Default On | Overlay Manager      | Default On |
| ECM Settings         | Default On | ReportDefinition     | Default On |
| ECM Trail            | Default On | ReportOutputHistory  | Default On |
| ECM Workflow         | Default On | Settings             | Default On |
| Old CSO Tab1(Unused) | Default On |                      |            |

- From 'ReportDefinition' list of tab, open the report definition which custom portal user is going to use, and click 'Share' button, then click 'Add' button to add and make 'All Customer Portal User' from Available field to Share with field.

※In case of making "View All" of 'Report Definition' as checked when custom object's authority setting in 5, all report definitions registered in report definition object will be displayed.

Report Properties  
sample

Property of Report Definitions

Edit

Delete

Share

Basic Information

Name

sample

Explanation

Authority

User:Naoki Iguchi

Mapping Infos

Overlay

(Dynamic) Construction Estimate (Version 1.0)

Object

Apex Test Result

New Sharing

SaveCancel

Sharing Information

Search: Public Groups

for:

Find

Available

Share With

All Internal Users  
Group: Group Alfa  
Group: Group Beta  
Group: Partners  
Group: Reference partners  
Group: Test Group 2 of YF  
Group: Test Group of YF

Add  
Remove

All Customer Portal Users

Access Level
Read Only

SaveCancel

- In the Login page of the user by which this custom portal setting is applied, the tab selected is displayed, and it will be able to operate according to Fleekform profile authorities.

Fleekform

Search...

Search

suwa@en.com

Help & Training

Fleekform

Home Opportunities Form Manager Fleekform Report Definition ReportHistory Fleekform Settings MyNumber +

Fleekform

Report Definition Name

Object

Form

Final Updator

Date Modified

0Items

1 2 3 4 5 > >|

+

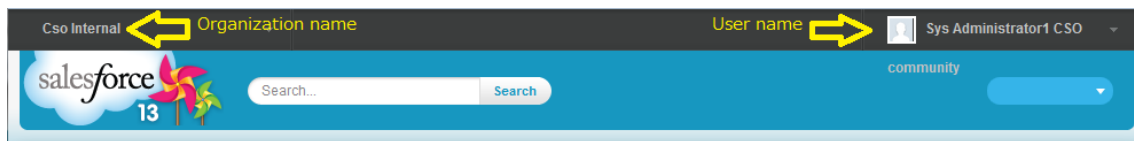
#### 4.4. In a case where a Salesforce community user uses Fleekform menu.

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

##### 4.4.1. 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.



##### 4.4.2. Tab display settings of Fleekform

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

## Digital Experiences

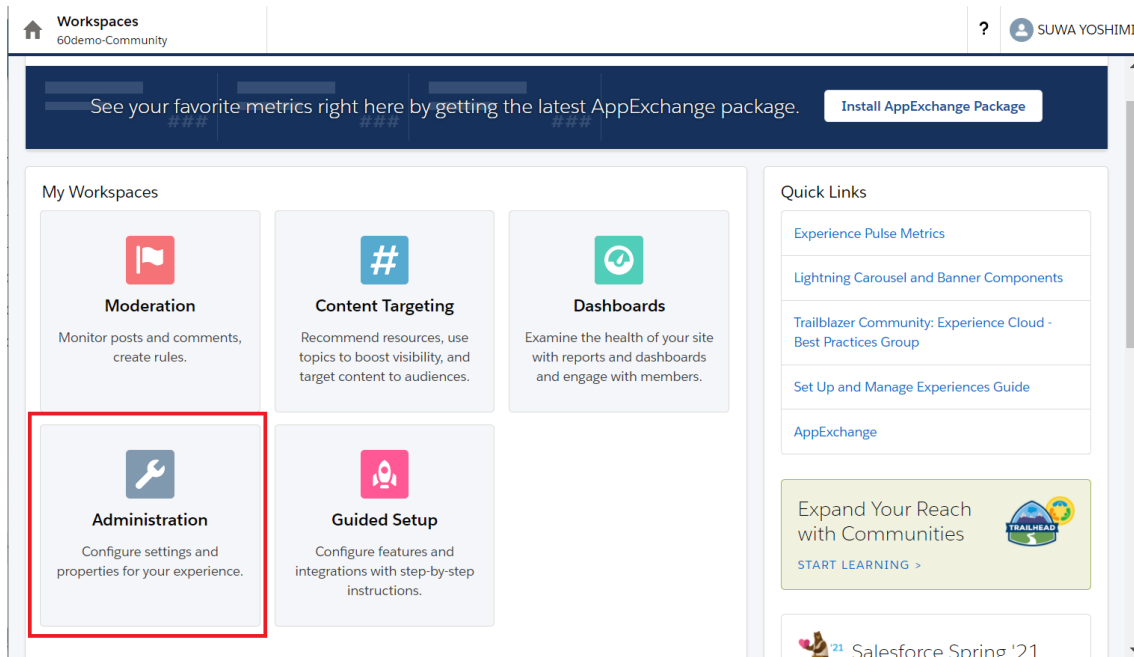
[Visit our Trailblazer Community](#) | [Help for this Page](#) ?

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.

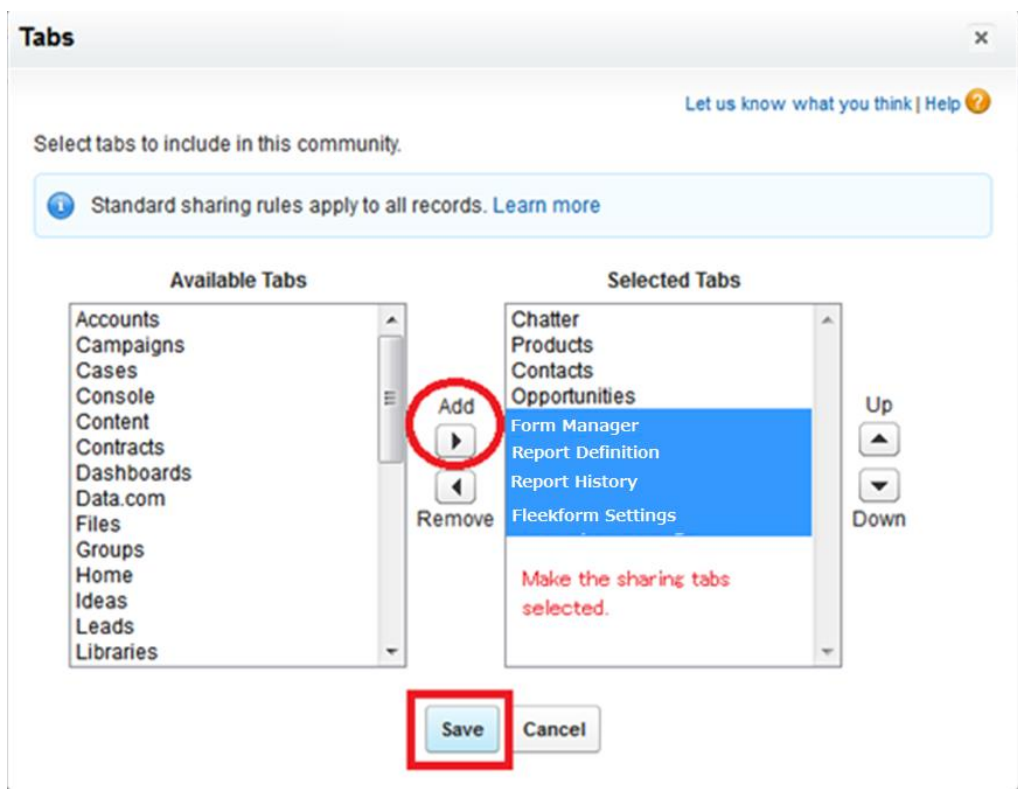
Maximum number of sites (including active, inactive, and preview): 100

| All Sites <span>New</span>                           |                  |             |                                                                                                 |        |
|------------------------------------------------------|------------------|-------------|-------------------------------------------------------------------------------------------------|--------|
| Action                                               | Name             | Description | URL                                                                                             | Status |
| <a href="#">Workspaces</a>                           | 60demo-Community |             | <a href="https://solxyz60demo.force.com/customers">https://solxyz60demo.force.com/customers</a> | Active |
| <a href="#">Workspaces</a>   <a href="#">Builder</a> | AccountCommunity |             | <a href="https://solxyz60demo.force.com/ac">https://solxyz60demo.force.com/ac</a>               | Active |
| <a href="#">Workspaces</a>   <a href="#">Builder</a> | Koa              |             | <a href="https://solxyz60demo.force.com/Koa">https://solxyz60demo.force.com/Koa</a>             | 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. Likewise, go to "Members" on the left side and add a profile to use the community as well as "Fleekform administrator" sets.

**Members**

Let us know what you think | Help

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

**Select Profiles**

Search: Internal for: Find

**Available Profiles**

- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Force.com - App Subscription User
- Force.com - Free User
- Marketing User
- Partner App Subscription
- Read Only
- Solution Manager

**Selected Profiles**

- Standard Platform User
- Customer Portal Manager Custo
- Customer Portal Manager Stand:
- System Administrator

Add as necessary

**Select Permission Sets**

Find

**Available Permission Sets**

- None--

**Selected Permission Sets**

- Fleekform管理者権限 (Salesforc
- Fleekform管理者権限 (High Volu

Add permission sets according to the profiles selected above.

**(Optional) Share Community Before Publishing**

Copy this link to share with stakeholders who need to see the community before you publish it.  
**Important** The link only works for users with the selected profiles.  
<https://cso01-commu-com-developer-edition.ap0.force.com/cso1>

Save Cancel

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

**Report**

Search... Search

LoggedIn as 責任者2 TEST1 (tsando12@solxyz.co.jp)

Chatter Opportunities Contacts Overlay Manager Report creation rule ReportHistory **ReportDefinition**

Create New...

Recent Items

責任者2 TEST1

ReportDefinition Home

View: All Go!

**Recent ReportDefinition** Create New ReportDefinition Recently Viewed

No recent records. Click Go or select a view from the dropdown to display records.

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#### 4.5. 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.

#### 4.5.1. For Activated Profiles after the Installation

1. After another profile is added, select Setup>Administration Setup>Manage Users>Profiles.  
※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.

| Action                                     | Name                                                  | User License                     | Custom                              |
|--------------------------------------------|-------------------------------------------------------|----------------------------------|-------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">(copy) Customer Portal Manager Custom</a> | Customer Portal Manager Custom   | <input checked="" type="checkbox"/> |
| <a href="#">Edit</a>                       | <a href="#">Chatter External User</a>                 | Chatter External                 | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Chatter Free User</a>                     | Chatter Free                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Chatter Moderator User</a>                | Chatter Free                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Chatter Only User</a>                     | Chatter Only                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Content Only User</a>                     | Content Only                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Contract Manager</a>                      | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Customer Portal Manager</a>               | Customer Portal Manager          | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Customer Portal Manager Custom</a>        | Customer Portal Manager Custom   | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Customer Portal Manager Standard</a>      | Customer Portal Manager Standard | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Customer Portal User</a>                  | Customer Portal User             | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Force.com - One App User</a>              | Force.com - One App              | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Gold Partner User</a>                     | Gold Partner                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">High Volume Customer Portal User</a>      | High Volume Customer Portal      | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Knowledge Only User</a>                   | Knowledge Only                   | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Marketing User</a>                        | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Read Only</a>                             | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Siteforce Only User</a>                   | Siteforce Only                   | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Solution Manager</a>                      | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Standard Platform User</a>                | Salesforce Platform              | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Standard User</a>                         | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">System Administrator</a>                  | Salesforce                       | <input type="checkbox"/>            |

2. Confirm the 'Enabled Apex Class Access' and 'Enabled Visualforce Page Access' in the bottom of profile.

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

|                                                                                               |                                   |
|-----------------------------------------------------------------------------------------------|-----------------------------------|
| Enabled Apex Class Access <a href="#">Edit</a> <a href="#">Enabled Apex Class Access Help</a> |                                   |
| Apex Class Name                                                                               | AppExchange Package Name          |
| <a href="#">SOLXYZCSO001.BeforeDeliverController</a>                                          | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.CSOPostService</a>                                                   | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.CSORestHttpCalloutMockImpl</a>                                       | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.CSOLUserAdminController</a>                                          | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.CSOLUserInfo</a>                                                     | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.CSOLUserInfoExt</a>                                                  | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.ComparableDescribeFieldResult</a>                                    | <a href="#">CloudSharedOffice</a> |

|                                                                                                           |                                   |
|-----------------------------------------------------------------------------------------------------------|-----------------------------------|
| Enabled Visualforce Page Access <a href="#">Edit</a> <a href="#">Enabled Visualforce Page Access Help</a> |                                   |
| Visualforce Page Name                                                                                     | AppExchange Package Name          |
| <a href="#">SOLXYZCSO001.AddContent</a>                                                                   | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.AddContentResult</a>                                                             | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.AddSpace</a>                                                                     | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.AppConfig</a>                                                                    | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.BeforeDelivery</a>                                                               | <a href="#">CloudSharedOffice</a> |
| <a href="#">SOLXYZCSO001.BeforeDeliverForAccount</a>                                                      | <a href="#">CloudSharedOffice</a> |

However, if it displays 'No Apex Classes enabled' or 'No Visualforce Pages enabled' like below, please validate them with the following steps.



**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

3. Click 'Edit' button of validate Apex Class button to display the validation page.

**Enable Apex Class Access**
Help for this Page ?

Save

Cancel

Available Apex Classes

SOLXYZCSO001.BeforeDeliveryController

SOLXYZCSO001.CSOPostService

SOLXYZCSO001.CSORestHttpCalloutMockImpl

SOLXYZCSO001.CSOUAdminController

SOLXYZCSO001.CSOUUserInfo

SOLXYZCSO001.ComparableDescribeFieldResult

SOLXYZCSO001.ComparableDescribeSObjectResult

SOLXYZCSO001.ContentsSelectController

SOLXYZCSO001.ESAPI

SOLXYZCSO001.GlobalTokenAccessor

SOLXYZCSO001.RelatedContentsDetailController

SOLXYZCSO001.RelatedContentsListController

SOLXYZCSO001.SFDCAccessControlException

SOLXYZCSO001.SFDCAccessControlResults

Add

Remove

Enabled Apex Classes

--None--

4. Select all items in the 'Available Apex Class' in the left side, and click 'Add' button in the middle.

**Enable Apex Class Access**
Help for this Page ?

Save

Cancel

Available Apex Classes

SOLXYZCSO001.SFDCAccessController

SOLXYZCSO001.SFDCBaseValidationRule

SOLXYZCSO001.SFDCCharacter

SOLXYZCSO001.SFDCEncoder

SOLXYZCSO001.SFDCIntegerValidationRule

SOLXYZCSO001.SFDCNumberValidationRule

SOLXYZCSO001.SFDCPatterns

SOLXYZCSO001.SFDCStringValidationRule

SOLXYZCSO001.SFDCValidator

SOLXYZCSO001.ScheduledCSOUAdminBatch

SOLXYZCSO001.WRCSOUAdminInfo

SOLXYZCSO001.WRScheduledCSOUAdminBatch

SOLXYZCSO001.WRUserAdminController

SOLXYZCSO001.WRUserInfo

Add

Remove

Enabled Apex Classes

--None--

Select all.

5. Confirm if all selected Apex Classes were transferred to the right side 'Enabled Apex Classes', then click 'Save' button.

## Enable Apex Class Access

Help for this Page ?

- Click 'Edit' button of validated Visualforce page to display the validation page.

## Enable Visualforce Page Access

Help for this Page ?

- Select all items in the 'Available Visualforce Pages' field in the left and click 'Add' button in the middle.

## Enable Visualforce Page Access

Help for this Page ?

- Confirm if all selected Visualforce pages are transferred to the right side 'Enabled Visualforce Pages', and click 'Save' button.

## Enable Visualforce Page Access

Help for this Page ?

- Confirm if the validated Apex Class and Visualforce Page are displayed as list on profile page for this means it is completed.

| Enabled Apex Class Access                                  |                                   | Edit | Enabled Apex Class Access Help ? |
|------------------------------------------------------------|-----------------------------------|------|----------------------------------|
| Apex Class Name                                            | AppExchange Package Name          |      |                                  |
| <a href="#">SOLXYZCSO001.BeforeDeliver/Controller</a>      | <a href="#">CloudSharedOffice</a> |      |                                  |
| <a href="#">SOLXYZCSO001.CSOPostService</a>                | <a href="#">CloudSharedOffice</a> |      |                                  |
| <a href="#">SOLXYZCSO001.CSORestHttpCalloutMockImpl</a>    | <a href="#">CloudSharedOffice</a> |      |                                  |
| <a href="#">SOLXYZCSO001.CSOLUserAdminController</a>       | <a href="#">CloudSharedOffice</a> |      |                                  |
| <a href="#">SOLXYZCSO001.CSOLUserInfo</a>                  | <a href="#">CloudSharedOffice</a> |      |                                  |
| <a href="#">SOLXYZCSO001.CSOLUserInfoExt</a>               | <a href="#">CloudSharedOffice</a> |      |                                  |
| <a href="#">SOLXYZCSO001.ComparableDescribeFieldResult</a> | <a href="#">CloudSharedOffice</a> |      |                                  |

| Enabled Visualforce Page Access                      |                                   | Edit | Enabled Visualforce Page Access Help ? |
|------------------------------------------------------|-----------------------------------|------|----------------------------------------|
| Visualforce Page Name                                | AppExchange Package Name          |      |                                        |
| <a href="#">SOLXYZCSO001.AddContent</a>              | <a href="#">CloudSharedOffice</a> |      |                                        |
| <a href="#">SOLXYZCSO001.AddContentResult</a>        | <a href="#">CloudSharedOffice</a> |      |                                        |
| <a href="#">SOLXYZCSO001.AddSpace</a>                | <a href="#">CloudSharedOffice</a> |      |                                        |
| <a href="#">SOLXYZCSO001.AppConfig</a>               | <a href="#">CloudSharedOffice</a> |      |                                        |
| <a href="#">SOLXYZCSO001.BeforeDelivery</a>          | <a href="#">CloudSharedOffice</a> |      |                                        |
| <a href="#">SOLXYZCSO001.BeforeDeliverForAccount</a> | <a href="#">CloudSharedOffice</a> |      |                                        |

- ⚠ If there are several profiles which need to use CSO which was added after install, set all profiles, the same as above.

### 4.6. About Profiles which Need Manual Configuration after the Installation

It happens sometimes to not be able to use Fleekform menu with only package installation depending on Salesforce license or profiles type which were set by user.

#### 4.6.1. Manual Configuration for Each Profiles

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

## 5. Uninstall

In this chapter, it explains about how to uninstall the Fleekform.

## 5.1. Confirmation for Uninstallation

'Fleekform' will be displayed through Setup>App Setup>Installed Packages.

### 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 | Status | Allowed Licenses | Used Licenses | Expiration Date    | Install Date        |
| <a href="#">Uninstall</a>                                                                                                                                 | CloudSharedOffice | 株式会社<br>ソルクシ<br>ーズ | 2.0.10         | SOLXYZCSO001     | Active | Unlimited        | 0             | Does not<br>Expire | 2/7/2013<br>3:19 AM |
| <b>Description</b><br>・Salesforce 帳票のPDF生成/配信/履歴管理<br>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。<br>・Salesforce 連携セキュアECM<br>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                                                                                                                      |                   |                    |                |                  |        |                  |               |                    |                     |

Uninstall will not be performed even if clicking 'Uninstall' and clicking the 'Uninstall' button in the package component, but it will only display the set items.

### Uninstalling a Package

Help for this Page ?

| Unable to uninstall package |                                            |                                                                                                               |
|-----------------------------|--------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| Problems                    |                                            |                                                                                                               |
| Component Type              | Name                                       | Problem                                                                                                       |
| Visualforce Page            | <a href="#">RelatedContentsListAccount</a> | The object is in use by another object and cannot be deleted. Account ECM Layout2                             |
| Visualforce Page            | <a href="#">RelatedContentsListContact</a> | The object is in use by another object and cannot be deleted. Contact ECM Layout2                             |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">Standard User</a>          |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">Standard Platform User</a> |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">Read Only</a>              |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">Solution Manager</a>       |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">Marketing User</a>         |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">Contract Manager</a>       |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Page Layout                 | <a href="#">User User Layout CSO</a>       | This installed component is referenced by a locally created component. <a href="#">System Administrator</a>   |
| Apex Class                  | <a href="#">CSORest</a>                    | The Apex class "CSORest" is currently in use by a scheduled job and cannot be deleted.                        |
| Apex Class                  | <a href="#">WRScheduledCSOUserBatch</a>    | The Apex class "WRScheduledCSOUserBatch" is currently in use by a scheduled job and cannot be deleted.        |

Please Perform the following steps to uninstall.

## 5.2. Change Page Layout Assignment

1. Page layout for Fleekform is used in user information. (Set in 3.1.)

Display profile list by selecting Setup>Administration Setup>Manage Users>Profiles.

### 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 <span>New</span>                   |                                                       |                                  |                                     |
|--------------------------------------------|-------------------------------------------------------|----------------------------------|-------------------------------------|
| Action                                     | Name                                                  | User License                     | Custom                              |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">(copy) Customer Portal Manager Custom</a> | Customer Portal Manager Custom   | <input checked="" type="checkbox"/> |
| <a href="#">Edit</a>                       | <a href="#">Chatter External User</a>                 | Chatter External                 | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Chatter Free User</a>                     | Chatter Free                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Chatter Moderator User</a>                | Chatter Free                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Chatter Only User</a>                     | Chatter Only                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Content Only User</a>                     | Content Only                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Contract Manager</a>                      | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Customer Portal Manager</a>               | Customer Portal Manager          | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Customer Portal Manager Custom</a>        | Customer Portal Manager Custom   | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Customer Portal Manager Standard</a>      | Customer Portal Manager Standard | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Customer Portal User</a>                  | Customer Portal User             | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Force.com - One App User</a>              | Force.com - One App              | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Gold Partner User</a>                     | Gold Partner                     | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">High Volume Customer Portal User</a>      | High Volume Customer Portal      | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Knowledge Only User</a>                   | Knowledge Only                   | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Marketing User</a>                        | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Read Only</a>                             | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Siteforce Only User</a>                   | Siteforce Only                   | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Solution Manager</a>                      | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Standard Platform User</a>                | Salesforce Platform              | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">Standard User</a>                         | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a>                       | <a href="#">System Administrator</a>                  | Salesforce                       | <input type="checkbox"/>            |

2. Select and check for profiles which could not uninstall.

\* Profiles can be deleted if it is not needed, but for profiles which are set to 'System Administrator', it cannot be deleted. Please check the following steps to delete those profiles.

Profile

## 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 information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record with this profile.

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

### Profile Detail

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

|              |                                                    |                |                                        |
|--------------|----------------------------------------------------|----------------|----------------------------------------|
| Name         | Standard User                                      |                |                                        |
| User License | Salesforce                                         | Custom Profile | <input type="checkbox"/>               |
| Created By   | <a href="#">Yasuteru Fujita</a> , 8/1/2012 9:58 PM | Modified By    | <a href="#">Hiroko Yamabe</a> , 2/7/20 |

### Console Settings

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

### Page Layouts

#### Standard Object Layouts

|                  |                                                                                    |                     |                                                                               |
|------------------|------------------------------------------------------------------------------------|---------------------|-------------------------------------------------------------------------------|
| Home Page Layout | Dashboard Home Page Default<br><a href="#">[ View Assignment ]</a>                 | Event               | <a href="#">Event Layout</a><br><a href="#">[ View Assignment ]</a>           |
| Account          | <a href="#">Account ECM Layout</a><br><a href="#">[ View Assignment ]</a>          | Lead                | <a href="#">Lead Layout</a><br><a href="#">[ View Assignment ]</a>            |
| Asset            | <a href="#">Asset Layout</a><br><a href="#">[ View Assignment ]</a>                | Opportunity         | <a href="#">Opportunity Layout</a><br><a href="#">[ View Assignment ]</a>     |
| Campaign         | <a href="#">Campaign Layout</a><br><a href="#">[ View Assignment ]</a>             | Opportunity Product | <a href="#">Opportunity Product La</a><br><a href="#">[ View Assignment ]</a> |
| Campaign Member  | <a href="#">Campaign Member Page Layout</a><br><a href="#">[ View Assignment ]</a> | Product             | <a href="#">Product Layout</a><br><a href="#">[ View Assignment ]</a>         |
| Case             | <a href="#">Case Layout</a><br><a href="#">[ View Assignment ]</a>                 | Solution            | <a href="#">Solution Layout</a><br><a href="#">[ View Assignment ]</a>        |
| Case Close       | <a href="#">Close Case Layout</a><br><a href="#">[ View Assignment ]</a>           | Task                | <a href="#">Task Layout</a><br><a href="#">[ View Assignment ]</a>            |
| Contact          | <a href="#">Contact Layout</a><br><a href="#">[ View Assignment ]</a>              | User                | <a href="#">User Layout CSO</a><br><a href="#">[ View Assignment ]</a>        |
| Contract         | <a href="#">Contract Layout</a><br><a href="#">[ View Assignment ]</a>             |                     |                                                                               |

- Click 'View Assignment' of 'User' in page layout general object layout in profile details.

## User

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

| Edit Assignment                                       |                                 |
|-------------------------------------------------------|---------------------------------|
| Profiles                                              | Page Layout                     |
| <a href="#">(copy) Customer Portal Manager Custom</a> | <a href="#">User Layout CSO</a> |
| <a href="#">Chatter Only User</a>                     | <a href="#">User Layout CSO</a> |
| <a href="#">Content Only User</a>                     | <a href="#">User Layout CSO</a> |
| <a href="#">Contract Manager</a>                      | <a href="#">User Layout CSO</a> |
| <a href="#">Customer Portal Manager</a>               | <a href="#">User Layout CSO</a> |
| <a href="#">Customer Portal Manager Custom</a>        | <a href="#">User Layout CSO</a> |
| <a href="#">Customer Portal Manager Standard</a>      | <a href="#">User Layout CSO</a> |
| <a href="#">Customer Portal User</a>                  | <a href="#">User Layout CSO</a> |
| <a href="#">Force.com - One App User</a>              | <a href="#">User Layout CSO</a> |
| <a href="#">Gold Partner User</a>                     | <a href="#">User Layout CSO</a> |
| <a href="#">High Volume Customer Portal User</a>      | <a href="#">User Layout CSO</a> |
| <a href="#">Knowledge Only User</a>                   | <a href="#">User Layout CSO</a> |
| <a href="#">Marketing User</a>                        | <a href="#">User Layout CSO</a> |
| <a href="#">Read Only</a>                             | <a href="#">User Layout CSO</a> |
| <a href="#">Siteforce Only User</a>                   | <a href="#">User Layout CSO</a> |
| <a href="#">Solution Manager</a>                      | <a href="#">User Layout CSO</a> |
| <a href="#">Standard Platform User</a>                | <a href="#">User Layout CSO</a> |
| <a href="#">Standard User</a>                         | <a href="#">User Layout CSO</a> |
| <a href="#">System Administrator</a>                  | <a href="#">User Layout CSO</a> |
| Edit Assignment                                       |                                 |

4. Click 'Edit Assignment' button.
5. Click profile which is set to 'User Layout CSO' to change page layout to 'User Layout'.  
Click 'Save' button after the change is completed.

## 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 --  
-- Select Page Layout --  
User Layout  
User Layout CSO

4 Selected 0 Changed

| Profiles                              | Page Layout     |
|---------------------------------------|-----------------|
| (copy) Customer Portal Manager Custom | User 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 CSO |
| Read Only                             | User Layout     |
| Siteforce Only User                   | User Layout     |
| Solution Manager                      | User Layout     |
| Standard Platform User                | User Layout CSO |
| Standard User                         | User Layout CSO |
| System Administrator                  | User Layout CSO |

Save Cancel

### 5.3. Delete Scheduled Jobs

- Display the list by selecting Setup>Administration Setup>Monitoring>Scheduled Jobs.

## All Scheduled Jobs

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           |
|----------------------------------------------------------------------------------------|------------------|----------------|------------------|--------------------|--------------------|----------------|
| <a href="#">Manage</a> <span style="border: 1px solid red; padding: 0 2px;">Del</span> | CSOUserScheduled | Yamabe, Hiroko | 2/7/2013 6:00 AM | 3/14/2013 11:00 AM | 3/15/2013 11:00 AM | Scheduled Apex |

- Click 'Del' of 'CSOUserScheduled' and confirmation window will be popped up. Click 'OK' to complete 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

## 5.4. Uninstall Execution

### 8. Execute Fleekform Uninstall.

Select Setup>App Setup>Installed Packages, and “Fleekdrive / Fleekform” will be displayed.

## 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 | Status | Allowed Licenses | Used Licenses | Expiration Date | Install Date     |
| <b>Uninstall</b>                                                                                                                                          | Fleekdrive/Fleekform | 株式会社ソレクシーズ | 2.0.10         | SOLXYZCS0001     | Active | Unlimited        | 0             | Does not Expire | 2/7/2013 3:19 AM |
| <b>Description</b><br>・Salesforce帳票のPDF生成/送信/履歴管理<br>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。<br>・Salesforce連携セキュリティECM<br>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                                                                                                                      |                      |            |                |                  |        |                  |               |                 |                  |

### 9. Click ‘Uninstall’. An alert and package component 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                                     | Type             |
|                    | Account ECM Layout                       | Page Layout      |
|                    | <a href="#">AddContent</a>               | Visualforce Page |
|                    | <a href="#">AddContentController</a>     | Apex Class       |
|                    | <a href="#">AddContentControllerTest</a> | Apex Class       |
|                    | <a href="#">AddContentResult</a>         | Visualforce Page |
|                    | <a href="#">AddSpace</a>                 | Visualforce Page |
|                    | <a href="#">AppConfig</a>                | Visualforce Page |
|                    | <a href="#">AppConfigController</a>      | Apex Class       |
|                    | <a href="#">BeforeDelivery</a>           | Visualforce Page |

10. Check 'Yes' in the bottom of the page and click 'Uninstall'.

|                                 |    |
|---------------------------------|----|
| WRUserRoleSynchronizationWork   | 9  |
| WRUserRoleSynchronizationManage | 1  |
| WRSetting                       | 9  |
| Error_Log                       | 67 |
| ECM                             | 4  |

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

Uninstall

- Installed package will be shown, and displayed 'In Progress' on uninstalled package data.

## 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       |
|                                                                                                                                                  | Fleekdrive/Fleekform | 株式会社ソルクシーズ | 2.0 (Beta 8)   | SOLXYZCSO001     | 12/16/2012 8:44 PM |
| Description<br>・Salesforce帳票のPDF生成/配信/履歴管理<br>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。<br>・Salesforce連携セキュアECM<br>クラウドのコンデンツをセキュア(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   |
|                                | Fleekdrive/Fleekform (Version Name 2.0) | SOLXYZCSO001 | 2/9/2013 5:12 PM | In Progress      | 2/7/2013 5:12 PM |

- After the uninstalling has completed, the notification message will be sent to user.

Title: Succeeded Uninstalling the Package 'Fleekdrive / Fleekform'

- If you need to save the uninstalled data, you need to 'Download' the export data which is included in the uninstalled package within 48 hours through the link access in the message or in the access package page.

## 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   |
| <a href="#">Download</a> <a href="#">Del</a> | Fleekdrive/Fleekform (Version Name 2.0) | SOLXYZCSO001 | 2/9/2013 5:12 PM | Uninstall Complete | 2/7/2013 5:12 PM |

- Lastly, delete unnecessary package data and complete.

## 6. Note

### 6.1. About our authentication

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 Fleekform 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.

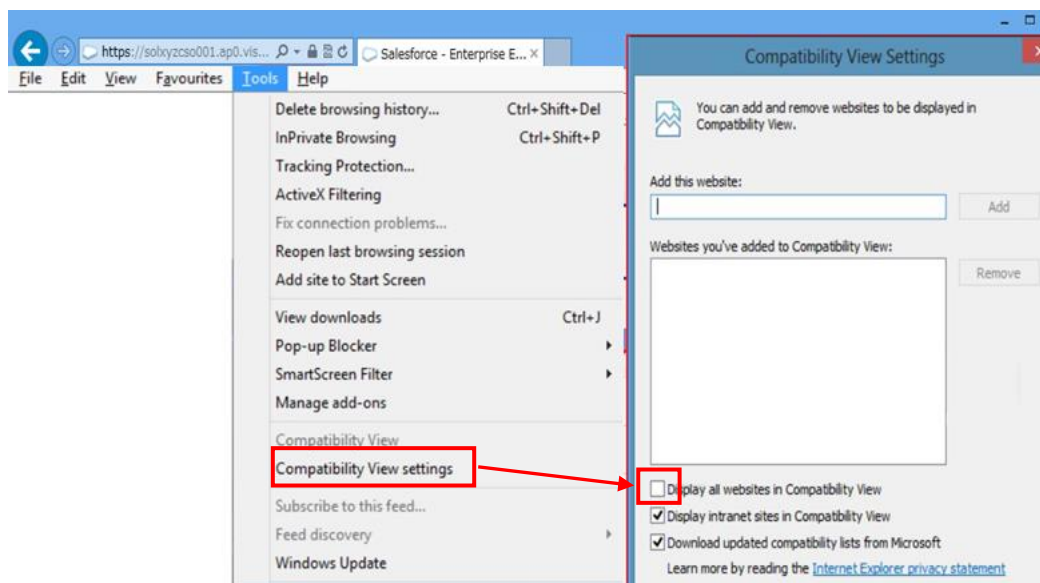
If checked, an authentication error will occur and Fleekform cannot be used.

- IP Restrict Requests

### 6.2. In Case of using Internet Explorer

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

- Menu bar: tool > Compatible view settings
- Unlock “Display all websites in Compatibility view”.



### 6.3. About customization

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

## Revision History

| Updated    | Version                    | Detail   | Reason                                                                                    |
|------------|----------------------------|----------|-------------------------------------------------------------------------------------------|
| 2017/03/04 | 1 <sup>st</sup><br>Edition | Creation | Creation                                                                                  |
| 2017/10/26 | 2 <sup>nd</sup><br>Edition | Change   | Changed the installation procedure due to renewal for App Exchange. (2.1)                 |
| 2018/07/24 | 3 <sup>rd</sup><br>Edition | Add      | Added 'Note' on using Professional Edition. (1.1)                                         |
| 2021/03/10 | 4 <sup>th</sup><br>Edition | Change   | Changed Community notation to Digital Experience due to name change in Salesforce (4.4.1) |

Fleekform Installation Guide  
4<sup>th</sup> Edition , March 10, 2021

Fleekdrive Co., Ltd  
<http://app.fleekform.com>

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