

Salesforce File Attachment Community Visibility Support Page

App Installation -

https://www.youtube.com/watch?v=yGmEG0H_nOk

DISCLAIMER-WARNING: This app is to be installed and used only by qualified Salesforce Administrators and Salesforce platform experts. This app updates the visibility of file attachments to community users and may cause undesired results if not configured correctly.

IMPORTANT TECHNICAL NOTES: If there are existing apex/triggers that update the visibility of file attachments, please work with your developer to ensure this does not conflict with the functions of this app.

INSTALLATION PREREQUISITES:

- Salesforce edition is developer, enterprise or unlimited
- Setup —> Company Settings —> My Domain —> Enabled
- Setup —> Chatter settings —> Enable Chatter
- Setup —> Notes settings —> Enable Notes
- Salesforce Communities

INSTALL STEPS:

- Select “Install for Admin Only”
- After successful installation, you will receive an email notification that install was successful
- To access the app, click on the app navigator in Salesforce (nine dots on top left) and select “File Visibility”

Use Case #1 - Making new file attachments for certain object records visible in communities -

<https://www.youtube.com/watch?v=u-NlWfx84mo>

Scenario: As an example requirement, any new files attached/uploaded by an internal user to a lead record (where lead='Working-Contacted') should be visible in the community for same lead record

Video Walkthrough:

- In the File Visibility app, set the record criteria (lead status = 'Working-Contacted') —> SAVE the criteria
- Check a lead record that meets the criteria and internal user upload a file
- Login to a community as a community member and validate that the file attachment is in the Files related list for the lead record where the file was uploaded

Result: *New files* attachment uploaded internally is visible in the community for lead records that meet the criteria

Use Case #2 - Retroactively update file attachment visibility for existing files already attached prior to this app was installed -

<https://www.youtube.com/watch?v=1AqOnmF1K38>

Scenario: Using scenario #1's record criteria as an example, we want to query all leads (where status ='Working-Contacted') and retroactively update all the visibility of *existing files* attached/uploaded.

Video Walkthrough:

- In the File Visibility app, edit the existing criteria in scenario #1

- Click on the checkbox “Retroactively Bulk Update Existing Files” —> SAVE the criteria
- Upon successful update, an email notification (not shown in video) is sent which provides the following sample message: *“The batch Apex job processed x batches with x failures. Total Records Processed: 100”*

Result: *Existing Files* will be visible in the community for lead records that meet the criteria.

Use Case #3 - Retroactively reverse file attachment visibility for existing files already attached (files will no longer be visible in the community) -

https://www.youtube.com/watch?v=CRMKZ_Fa8AU

Scenario: Using scenario #1’s record criteria as an example, we want to query all leads (where status = ‘Working-Contacted’) and retroactively update all the visibility of *existing files* attached/uploaded and make them NOT VISIBLE in the community.

Video Walkthrough:

- In the File Visibility app, edit the existing criteria in scenario #1
- Click on the checkbox “Retroactively Remove File Sharing” —> SAVE the criteria
- Upon successful update, an email notification (not shown in video) is sent which provides the following sample message: *“The batch Apex job processed x batches with x failures. Total Records Processed: 100”*

Result: *Existing Files* will no longer be visible in the community for lead records that meet the criteria.

FREQUENTLY ASKED QUESTIONS

BACKGROUND/WHAT DOES THIS APP DO?

By default, if an internal Salesforce user uploads a file attachment to a record, the file attachment is not visible to community users who have access to the same record. Typically, code is required to allow file attachment visibility in communities.

Our solution is to make it easy for administrators to make the internally uploaded file attachments visible to community users by object record criteria.

WHAT IS THE TECHNICAL GAP?

Today, if an internal user attaches a file to any record the default visibility is “InternalUsers” only. Hence, community users do not see it. The app sets file attachments to “AllUsers” for the record criteria specified by the admin.

HOW DO WE ADDRESS THIS TECHNICAL GAP?

We make it easy for an administrator to configure the visibility of file attachments within an object record criteria (i.e. all leads with specific status OR specific opportunity record types). To be more clear, if for example we set the criteria to “All leads”, then all file attachments in all leads they have access to will be visible to community users. *Once the criteria is set, then any new file attachment uploads for leads will have the correct visibility for community users.*

HOW ABOUT THE EXISTING FILE ATTACHMENTS?

In the configuration screen, after setting the record criteria and then select a checkbox that will allow you to retroactively update the visibility of existing file attachments.

WHAT IF I MADE A MISTAKE?

You can retroactively update the visibility of file attachments for the record criteria.

CAN CRITERIA/VISIBILITY BE SET FOR SPECIFIC FILE EXTENSIONS (i.e. JPG, DOCx, etc).

This feature is not available and will be placed in the product roadmap backlog

WHO CAN I CONTACT IF I HAVE ANY QUESTIONS:

Please email support@ecapps-salesforce.com