

Implementing Software Delivery with S-Drive for Salesforce.com

This document explains how a Software Vendor can provide software delivery through the Salesforce.com Service Cloud.

Salesforce.com Service Cloud provides sophisticated customer support and self-service features that are available via the “Customer Portal” or “Communities” interface. Customer portal interface is available to Enterprise and Unlimited Edition of Salesforce.com with additional cost.

In order to implement software delivery via the customer portal or communities of Salesforce.com, customers need to install and activate the S-Drive for Salesforce.com application from AppExchange (<http://appexchange.salesforce.com/listingdetail?listingId=a0N30000001SWUTEA4>).

Once the application is installed and configured based on the instructions given in the *S-Drive Installation Guide*, the next step is to configure Customer Portal, or to configure Communities.

Customer Portal configuration in general is outside the scope of this document. There are many resources available to setup customer portal on Salesforce.com platform, such as Salesforce.com help and *Salesforce Customer Portal Implementation Guide* (https://na1.salesforce.com/help/doc/en/salesforce_customer_portal_implementation_guide.pdf).

If you are using Communities instead of Customer Portal please see “*S-Drive Configuration for Salesforce.com Communities*”, in order to enable communities for your organization, create a new community, or configuring S-Drive for Community. You can also see the “*Set Up and Manage Salesforce Communities*” guide for more information about communities. (<https://resources.docs.salesforce.com/206/latest/en-us/sfdc/pdf/communities.pdf>)

CyanGate can also provide professional service for configuration of customer portal and communities.

For S-Drive to enable Software Delivery, customers will only need to provide access to S-Drive Attachments.

In order to provide Software Delivery on the Salesforce.com platform, there are certain setup tasks that involve:

1. Creation of two custom objects (Software Downloads and Software Versions).
2. Creation of Software Download tab.
3. Configuring S-Drive attachments for Software Versions object.
4. Manually assigning sharing rules to each customer portal or community role.

Creation of Software Downloads Object

Software Downloads (or any name found appropriate) can be created as any custom object. Fields under this object can include items such as Description, Name, Supported Platforms, New Release announcements, etc. Software Downloads object should be marked to be deployed and should be marked for Customer Portal access.

Custom Object [Help for this Page](#) ?

Software Download

[Standard Fields](#) [4] | [Custom Fields & Relationships](#) [11] | [Validation Rules](#) [0] | [Page Layouts](#) [1] | [Search Layouts](#) [6] | [Standard Buttons and Links](#) [8] | [Custom Buttons and Links](#) [0] | [Record Types](#) [0] | [Apex Sharing Reasons](#) [0] | [Apex Sharing Recalculation](#) [0]

Custom Object Definition Detail Edit Delete

Singular Label	Software Download	Description	
Plural Label	Software Downloads	Enable Reports	☐
Object Name	Software_Download	Track Activities	☐
API Name	Software_Download__c	Available for Customer Portal	☒
		Track Field History	☐
		Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
Created By	Admin User, 3/17/2011 7:59 PM		Modified By Admin User, 3/17/2011 7:59 PM

Standard Fields [Standard Fields Help](#) ?

Action	Field Label	Field Name	Data Type	Controlling Field
	Created By	CreatedBy	Lookup(User)	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Owner	Owner	Lookup(User,Queue)	
Edit	Software Download Name	Name	Text(80)	

Figure 1 Example Software Download Object

Important Note: If you turn on Communities in your organization, the “Available for Customer Portal” checkbox on custom objects will no longer appear. All custom objects are available for use in your communities.

Creation of Software Versions Object

Software Versions (or any name found appropriate) can be created as any custom object. Fields under this object can include items such as Description, Name, Supported Platforms, Version Number, release notes etc. Software Versions object should be marked to be deployed and also should be marked for Customer Portal

access. In addition, a Master-Detail relationship field should be created so that “Software Version” becomes the detail of “Software Downloads” object. (Setup > Customize > Create > Objects > Software Version > Custom Fields & Relationships > New).

Custom Object Help for this Page ?

Software Version

[Standard Fields \[3\]](#) | [Custom Fields & Relationships \[3\]](#) | [Validation Rules \[0\]](#) | [Page Layouts \[1\]](#) | [Search Layouts \[6\]](#) | [Standard Buttons and Links \[8\]](#) | [Custom Buttons and Links \[0\]](#) | [Record Types \[0\]](#)

Custom Object Definition Detail Edit Delete

Singular Label	Software Version	Description	
Plural Label	Software Versions	Enable Reports	☐
Object Name	Software_Version	Track Activities	☐
API Name	Software_Version__c	Available for Customer Portal	☒
		Track Field History	☐
		Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
Created By	Admin User, 3/17/2011 8:04 PM	Modified By	Admin User, 3/17/2011 8:04 PM

Standard Fields Standard Fields Help ?

Action	Field Label	Field Name	Data Type	Controlling Field
	Created By	CreatedBy	Lookup(User)	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Software Version Name	Name	Text(80)	

Custom Fields & Relationships New Field Dependencies Custom Fields & Relationships Help ?

Action	Field Label	API Name	Data Type	Controlling Field	Modified By
Edit Del	Software Download	Software_Download__c	Master-Detail(Software Download)		Admin User, 3/17/2011 8:08 PM
Edit Del	Version	Version__c	Text(255)		Admin User, 3/17/2011 8:08 PM
Edit Del	Version Description	Version_Description__c	Text Area(255)		Admin User, 3/17/2011 8:09 PM

Figure 2 Example Software Version Object

Important Note: If you turn on Communities in your organization, the “Available for Customer Portal” checkbox on custom objects will no longer appear. All custom objects are available for use in your communities.

Creation of Software Downloads Tab

Create a new “Custom Object Tab” for Software Downloads. This tab should be added to tab list of all portal and internal users.

Custom Object Tab Help for this Page ?

Software Downloads

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail Edit Delete

Tab Label	Software Downloads	Tab Style	 Credit card
Object	Software Download	Splash Page Custom Link	
Description			
Created By	Admin User, 4/12/2011 7:25 PM	Modified By	Admin User, 4/12/2011 7:25 PM

Figure 3 Example Software Downloads Tab

Configuration of S-Drive Attachments for Software Versions

In order to attach software packages to the appropriate version of the software downloads, S-Drive attachments should be configured. This can be done by following the instructions in the “*S-Drive Installation Guide*” Section D. Once this is configured, it should also be given “Customer Portal Access” rights.

Custom Object Help for this Page ?

Software File

[Standard Fields \[3\]](#) |
 [Custom Fields & Relationships \[8\]](#) |
 [Validation Rules \[0\]](#) |
 [Page Layouts \[1\]](#) |
 [Search Layouts \[4\]](#) |
 [Standard Buttons and Links \[8\]](#) |
 [Custom Buttons and Links \[0\]](#) |
 [Record Types \[0\]](#)

Custom Object Definition Detail Edit Delete

Singular Label	Software File	Description	
Plural Label	Software Files	Enable Reports	☐
Object Name	Software_File	Track Activities	☐
API Name	Software_File__c	Available for Customer Portal	☒
		Track Field History	☐
		Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
Created By	Admin User, 3/17/2011 8:12 PM		Modified By
			Admin User, 3/17/2011 8:12 PM

Standard Fields Standard Fields Help ?

Action	Field Label	Field Name	Data Type	Controlling Field
	<u>Created By</u>	CreatedBy	Lookup(User)	
	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)	
Edit	<u>Software Files Name</u>	Name	Text(80)	

Custom Fields & Relationships New Field Dependencies Custom Fields & Relationships Help ?

Action	Field Label	API Name	Data Type	Controlling Field	Modified By
Edit Del	<u>Content Type</u>	Content_Type__c	Text(255)		Admin User, 3/17/2011 8:17 PM
Edit Del	<u>Description</u>	Description__c	Text Area(255)		Admin User, 3/17/2011 8:18 PM
Edit Del	<u>File Name</u>	File_Name__c	Text(255)		Admin User, 3/17/2011 8:18 PM
Edit Del	<u>File Size</u>	File_Size__c	Formula (Text)		Admin User, 3/17/2011 8:19 PM
Edit Del	<u>File Size in Bytes</u>	File_Size_in_Bytes__c	Number(18, 0)		Admin User, 3/17/2011 8:19 PM
Edit Del	<u>Parent</u>	Parent__c	Master-Detail(Software Version)		Admin User, 3/17/2011 8:20 PM
Edit Del	<u>Private</u>	Private__c	Checkbox		Admin User, 3/17/2011 8:22 PM
Edit Del	<u>WIP</u>	WIP__c	Checkbox		Admin User, 3/17/2011 8:21 PM

Figure 4 S-Drive Software File Object

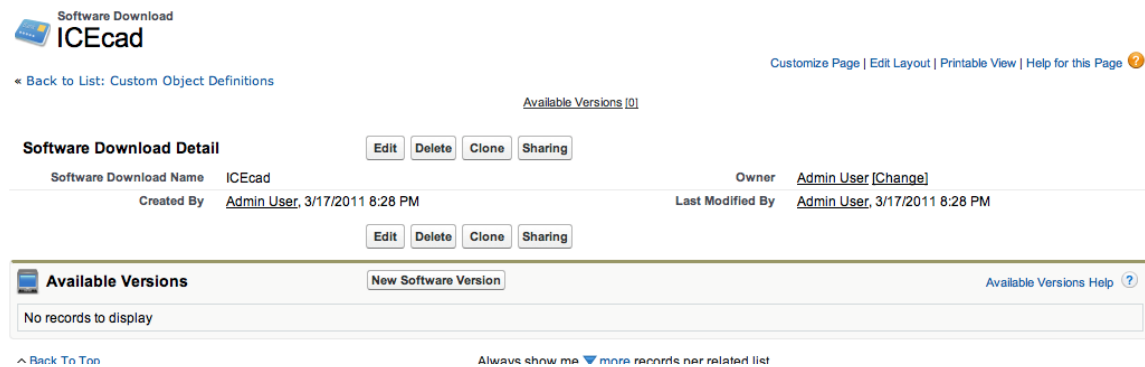
Important Note: If you turn on Communities in your organization, the “Available for Customer Portal” checkbox on custom objects will no longer appear. All custom objects are available for use in your communities.

Assignment of Sharing Rules

For Software Downloads to be available on Customer Portal or Community sharing rules should be setup appropriately. The sharing rules will also be used to provide access to software downloads based on user’s valid licenses. However, this document does not include details of any custom code development or process that can automate this process.

As part of the standard customer portal sharing rule setup, accounts, cases, opportunities and any other custom object such as Software Downloads should have their organization-wide default-sharing rule set as “Private”. This will ensure that only customers will access objects that are owned by them or explicitly shared by them.

For each Software Download object, read-only access should be given by manually sharing the object with the appropriate customer portal or community roles. This task will need to be handled manually for each software package that the account is entitled to download.



Software Download
ICEcad

Customize Page | Edit Layout | Printable View | Help for this Page ?

◀ Back to List: Custom Object Definitions Available Versions 0

Software Download Detail Edit Delete Clone Sharing

Software Download Name ICEcad Owner Admin User [Change]

Created By Admin User, 3/17/2011 8:28 PM Last Modified By Admin User, 3/17/2011 8:28 PM

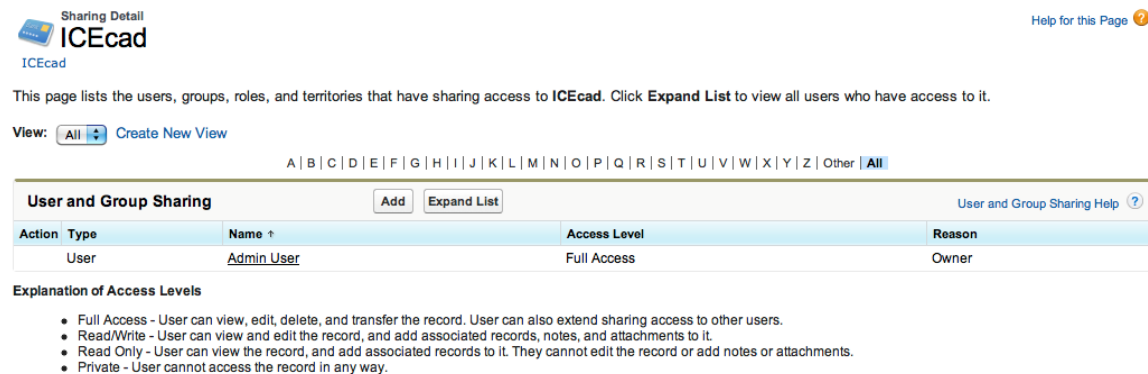
Edit Delete Clone Sharing

Available Versions New Software Version Available Versions Help ?

No records to display

^ Back To Top Always show me more records per related list

Figure 5 Example Software Download Detail View



Sharing Detail
ICEcad

Help for this Page ?

This page lists the users, groups, roles, and territories that have sharing access to **ICEcad**. Click **Expand List** to view all users who have access to it.

View: All 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

User and Group Sharing Add Expand List User and Group Sharing Help ?

Action	Type	Name +	Access Level	Reason
	User	Admin User	Full Access	Owner

Explanation of Access Levels

- Full Access - User can view, edit, delete, and transfer the record. User can also extend sharing access to other users.
- Read/Write - User can view and edit the record, and add associated records, notes, and attachments to it.
- Read Only - User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.
- Private - User cannot access the record in any way.

Figure 6 Example Software Download Sharing Detail

Software Download: Specify the sharing for this record. You can share this record and its related data with individual users, personal or public groups, the users in a particular role, or the users in a particular role plus all of the users in roles below that role.

Individual sharing can only be used to grant wider access to data, not to restrict access.

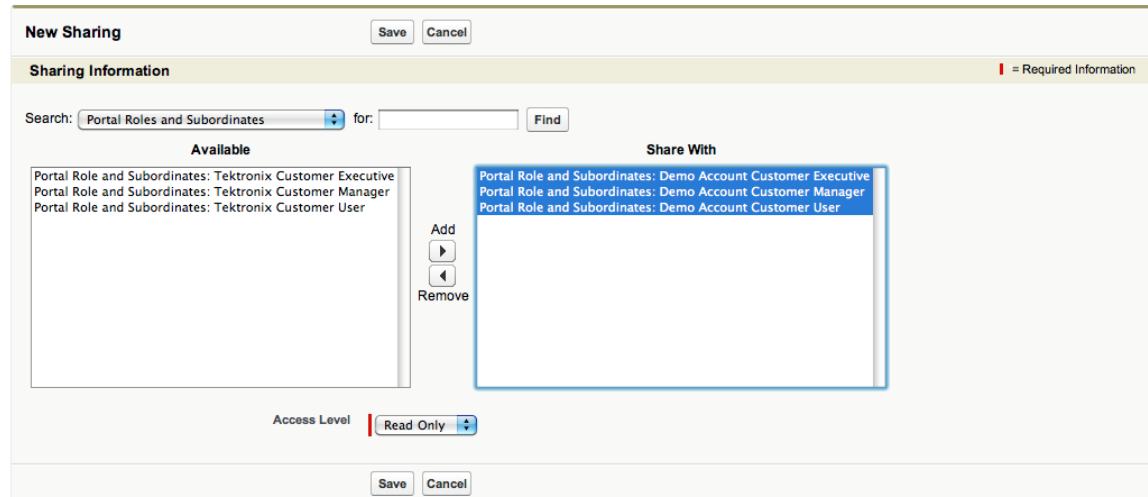


Figure 7 Example New Sharing Setting for Software Download

S-Drive Support

You can contact S-Drive Support team for any questions or problems that you couldn't solve using S-Drive documents:

1. Open a Ticket at Support Site: sdriveapp.com/support
2. Email: sdrive@sdriveapp.com

You can find up-to-date product information, documents, tutorial videos, tools in our web page:

www.sdriveapp.com