

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” 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 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 Install Guide, the next step is to configure Customer Portal.

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

Once the customer portal is configured, S-Drive should be configured for use on the Customer Portal platform. Instructions on how to configure S-Drive for customer portal can be found in the S-Drive Customer Portal Guide. In order 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 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 also should be marked for Customer Portal access.

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

Software Download

[Standard Fields \[4\]](#) | [Custom Fields & Relationships \[1\]](#) | [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](#)
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Singular Label	Software Download	Description	
Plural Label	Software Downloads	Enable Reports	<input type="checkbox"/>
Object Name	Software_Download	Track Activities	<input type="checkbox"/>
API Name	Software_Download__c	Available for Customer Portal	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		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

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.

Custom Object

Software Version

[Help for this Page](#) ?

[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	<input type="checkbox"/>
Object Name	Software_Version	Track Activities	<input type="checkbox"/>
API Name	Software_Version__c	Available for Customer Portal	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		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

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

Software Downloads

[Help for this Page](#) ?

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 “Configuring Standard/Custom Object Attachment Upload Feature”. Once this is configured, it should also be given “Customer Portal Access” rights.

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	<input type="checkbox"/>
Object Name	Software_File	Track Activities	<input type="checkbox"/>
API Name	Software_File__c	Available for Customer Portal	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		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
	Created By	CreatedBy	Lookup(User)	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Software Files 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	Content Type	Content_Type__c	Text(255)		Admin User, 3/17/2011 8:17 PM
Edit Del	Description	Description__c	Text Area(255)		Admin User, 3/17/2011 8:18 PM
Edit Del	File Name	File_Name__c	Text(255)		Admin User, 3/17/2011 8:18 PM
Edit Del	File Size	File_Size__c	Formula (Text)		Admin User, 3/17/2011 8:19 PM
Edit Del	File Size in Bytes	File_Size_in_Bytes__c	Number(18, 0)		Admin User, 3/17/2011 8:19 PM
Edit Del	Parent	Parent__c	Master-Detail(Software Version)		Admin User, 3/17/2011 8:20 PM
Edit Del	Private	Private__c	Checkbox		Admin User, 3/17/2011 8:22 PM
Edit Del	WIP	WIP__c	Checkbox		Admin User, 3/17/2011 8:21 PM


Figure 4 S-Drive Software File Object

Assignment of Sharing Rules

In order for Software Downloads to be available on Customer Portal 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 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
 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


New Sharing

[Help for this Page](#)

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.

New Sharing

[Save](#)
[Cancel](#)

Sharing Information

! = Required Information

Search: [Portal Roles and Subordinates](#) for: [Find](#)

Available

Portal Role and Subordinates: Tektronix Customer Executive
 Portal Role and Subordinates: Tektronix Customer Manager
 Portal Role and Subordinates: Tektronix Customer User

Share With

Portal Role and Subordinates: Demo Account Customer Executive
 Portal Role and Subordinates: Demo Account Customer Manager
 Portal Role and Subordinates: Demo Account Customer User

[Add](#)
[Remove](#)

Access Level: [Read Only](#)

[Save](#)
[Cancel](#)

Figure 7 Example New Sharing Setting for Software Download