

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=a0N30000001SWUTEA
4). 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_implementat ion_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

Implementing Software Delivery with S-Drive



should be marked to be deployed and also should be marked for Customer Portal access.

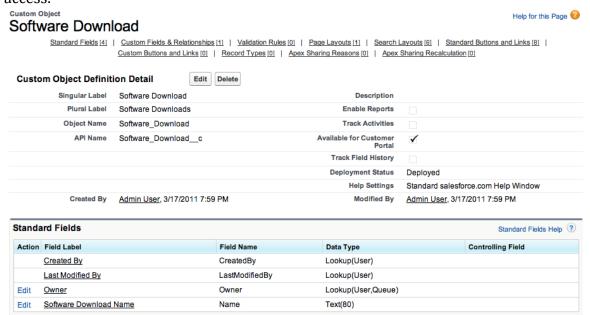


Figure 1 Example Software Download Object

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.



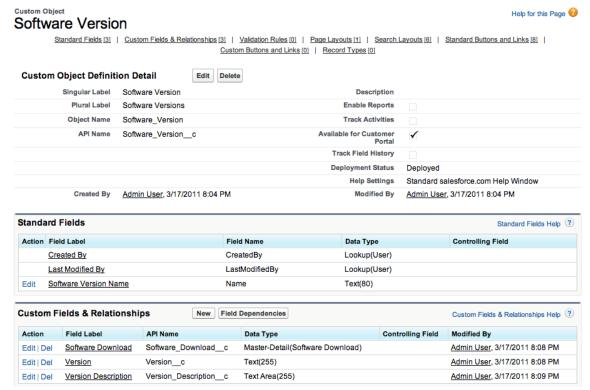


Figure 2 Example Software Version Object

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.



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.



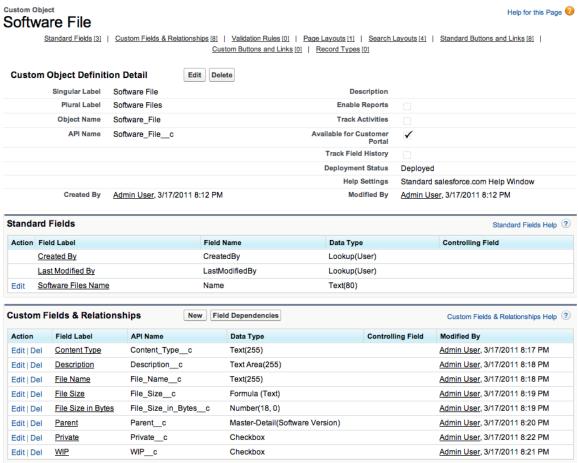


Figure 4 S-Drive Software File Object

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.



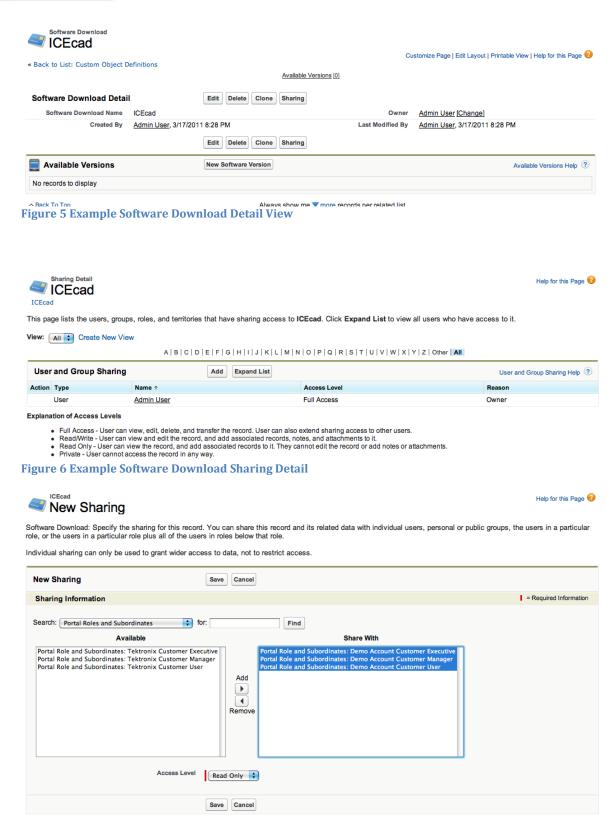


Figure 7 Example New Sharing Setting for Software Download