



S-Drive Salesforce Mobile App Configuration And User Guide v2.1

Important Note

This user guide contains detailed information about S-Drive Salesforce Mobile App usage. Refer to the *S-Drive Installation Guide* and *S-Drive Advanced Configuration Guide* for more information about installation/configuration of S-Drive product and *S-Drive User Guide* for standard S-Drive functionality.



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A. For S3Object Folders Files

In order to display S-Drive Mobile Tab on Salesforce Mobile App Navigation Menu, you should add the S-Drive Mobile Tab to Salesforce Mobile App Navigation Menu.

1. Customize Salesforce Mobile App Navigation Menu

- Click *Mobile Administration*. Then, click *Salesforce Navigation* (Figure 1).

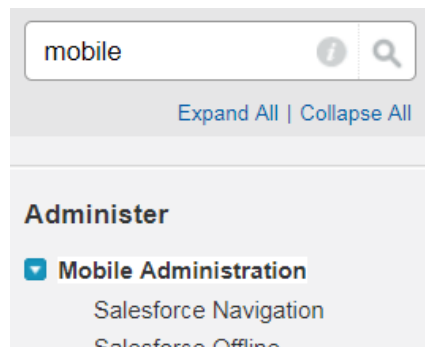


Figure 1

- Add S-Drive Mobile Tab from Available section. Add to the “Selected” section. Then, click Save (Figure 2).

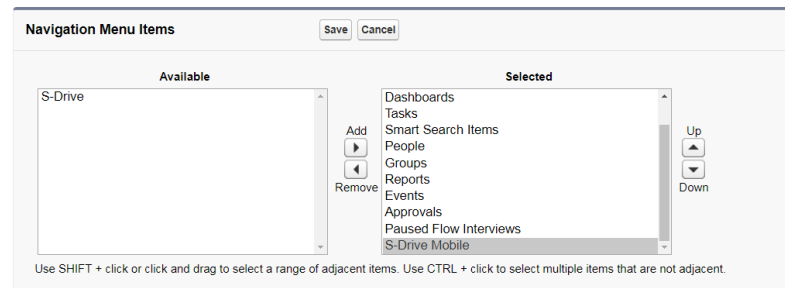


Figure 2

You can now see S-Drive Mobile Tab on Salesforce Mobile App navigation menu (Figure 3).

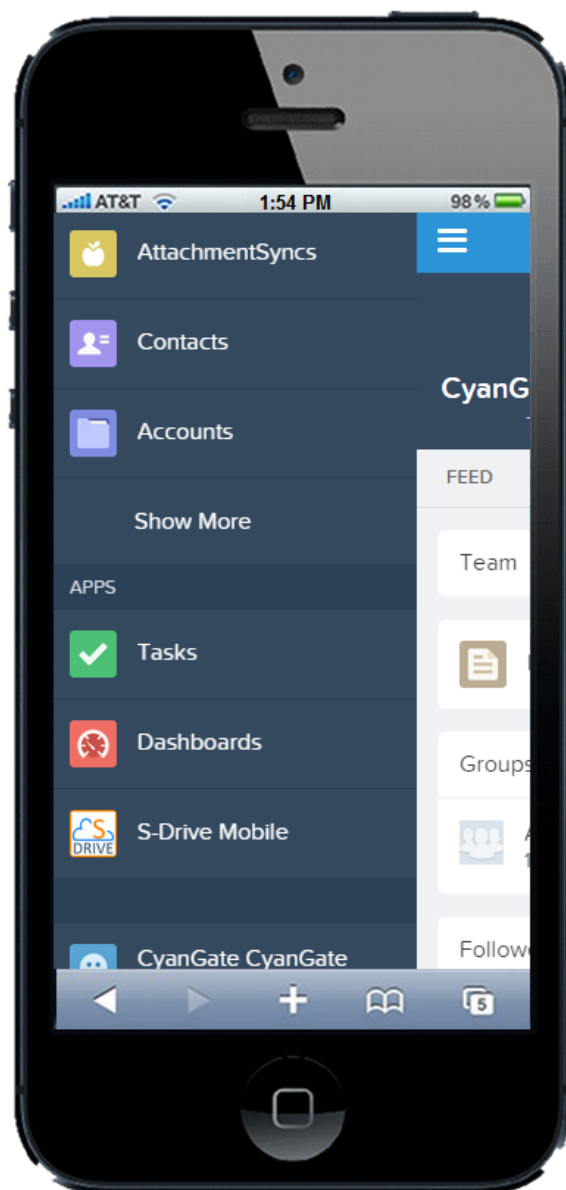


Figure 3

After clicking on the S-Drive Mobile tab, you can see S-Drive Folders files on S-Drive Mobile Page (Figure 4).

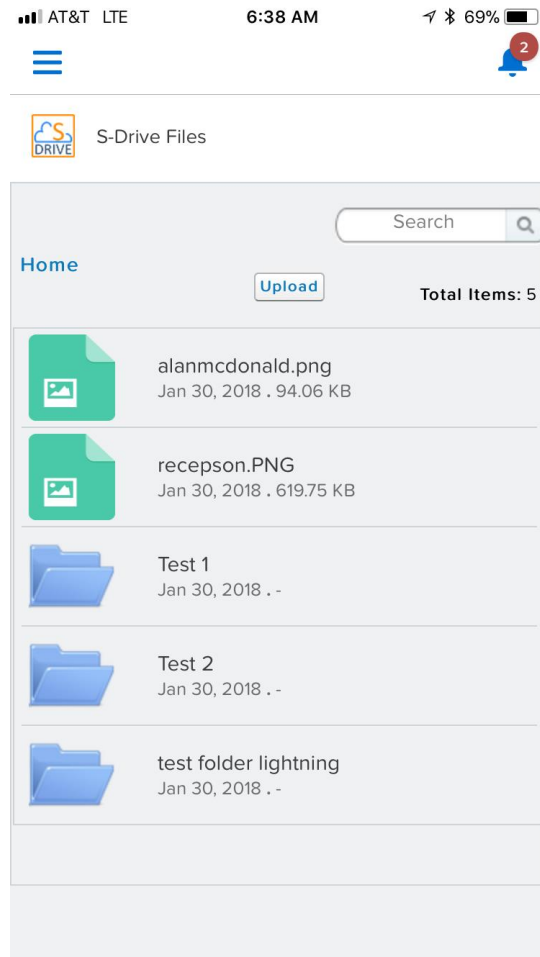


Figure 4

B. For Standard Objects S-Drive Attachments (Account/Case/Contact/Opportunity File)

For displaying S-Drive Attachments files on Salesforce Mobile App, you should add the S-Drive Attachments Visualforce pages (Figure 5) to their page layouts.

S-Drive Attachment Files	Mobile Pages
--------------------------	--------------

Account Files	<i>MobileAccountFilePage</i>
Case Files	<i>MobileCaseFilePage</i>
Contact Files	<i>MobileContactFilePage</i>
Opportunity Files	<i>MobileOpportunityFilePage</i>

Figure 5

There are two options for adding mobile S-Drive attachments pages to their page layouts: Adding as a Mobile Card and Adding Custom Button or Link.

Example for Case File

1. Add as a Mobile Card (Option1)

- Go to *Customize>Cases>Page Layouts* (Figure 6).

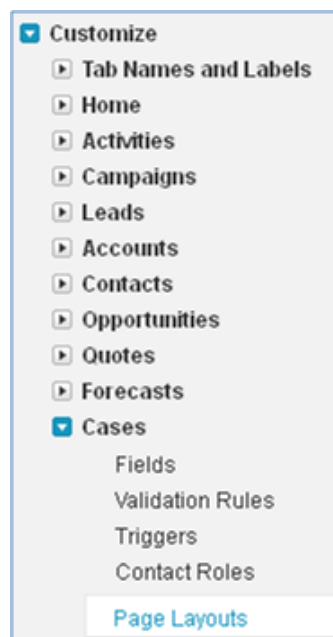


Figure 6

Figure 6 You can see *MobileCaseFilePage* page on Visualforce Pages section of Case Layout (Figure 7).

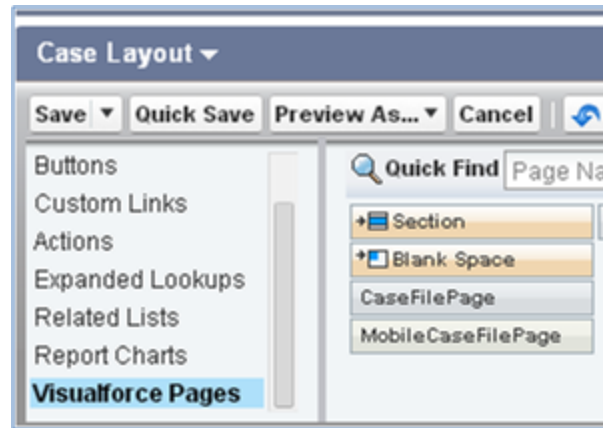


Figure 7

- Drag *MobileCaseFilePage* visualforce page to the Mobile Cards section (Figure 8).

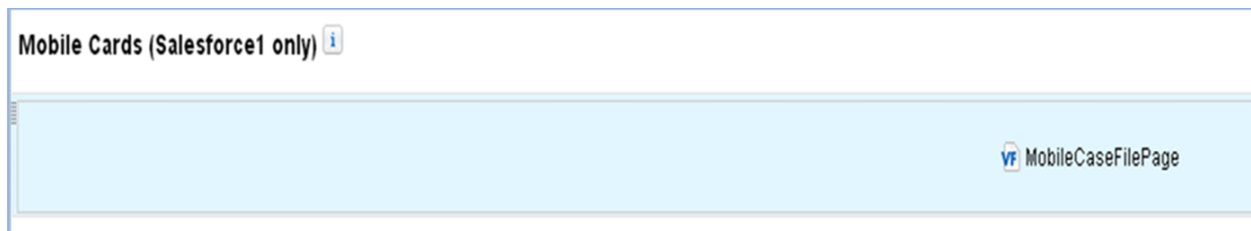


Figure 8

- Edit properties. Then, Save page layout (Figure 9).

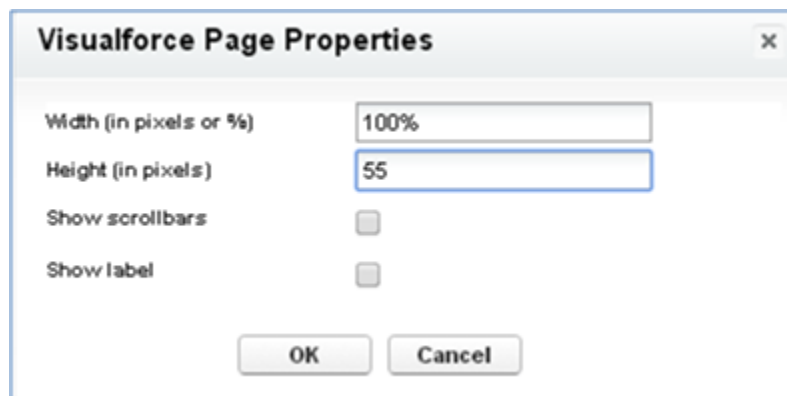


Figure 9

You can now see the Mobil Card on Related Items section of Salesforce Mobile App Case Detail Page (Figure 10).

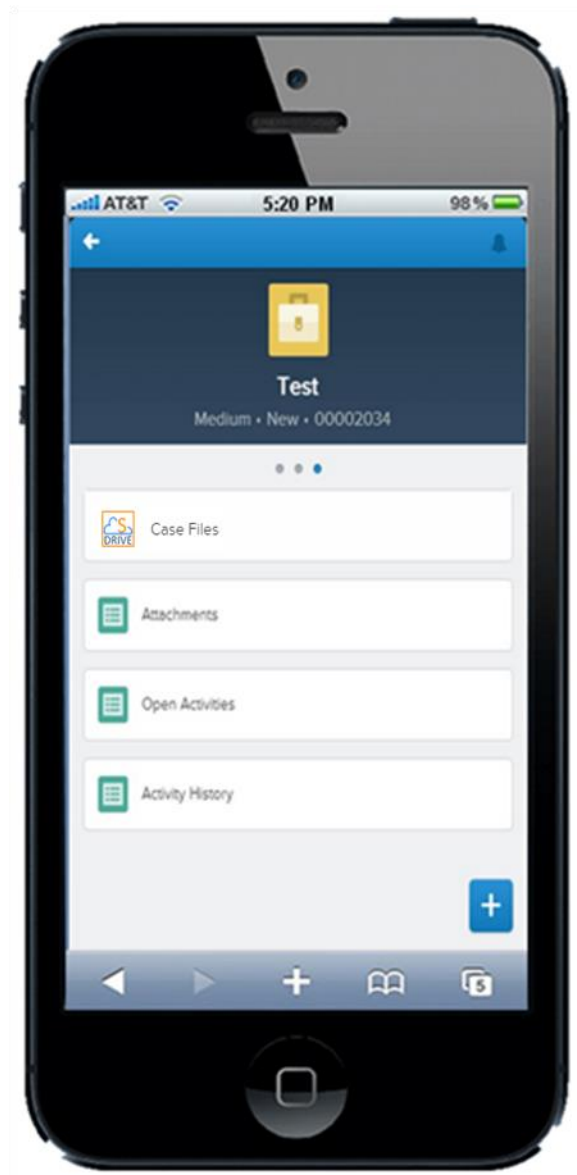


Figure 10

2. Add As a Custom Button or Link (Option2)

- Click *Customize>Cases>Buttons, Links and Actions* (Figure 11).

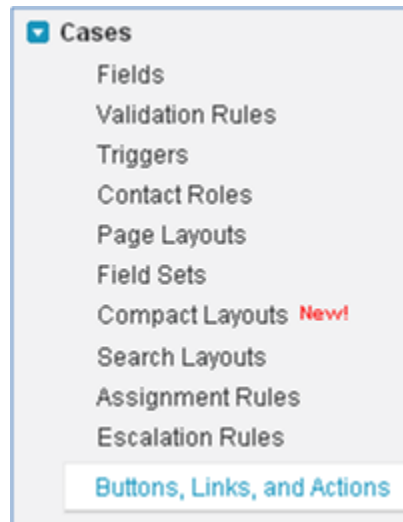


Figure 11

- Click on *New Button or Link* button. Give a Label and Name. Select Display Type and Behavior. Select *cg__MobileCaseFilePage* content. Then, Click Save (Figure 12).

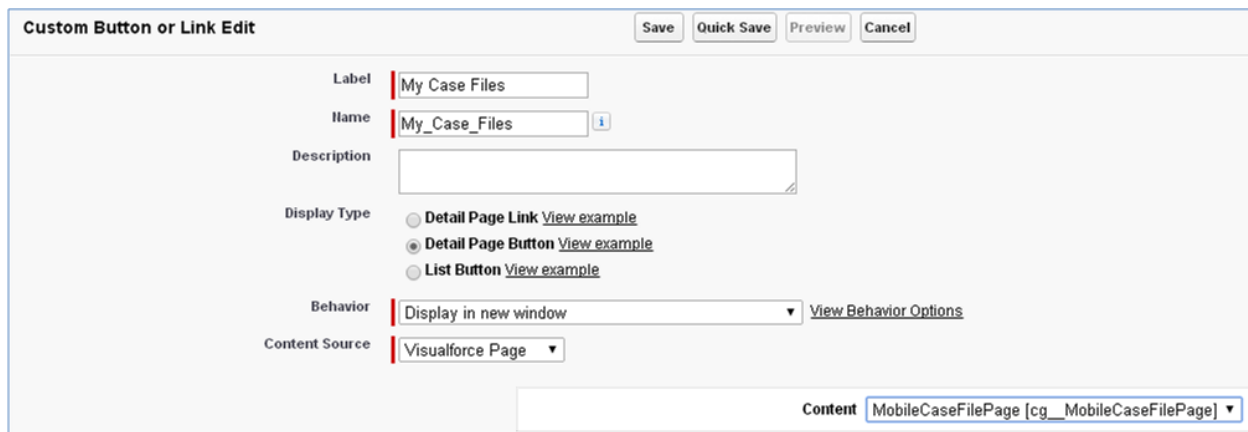


Figure 12

- Click *Edit Case Page Layout*. You can see *My Case Files* custom button on Buttons section of its layout (Figure 13).

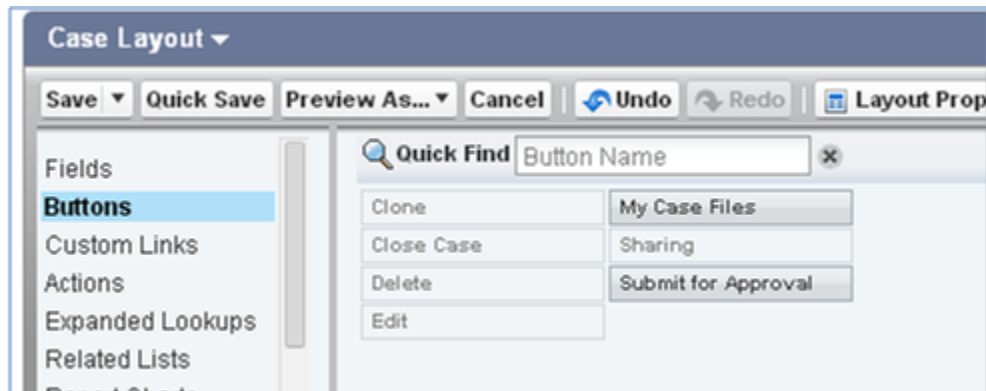


Figure 13

- Drag *My Case Files* button to the Custom Buttons section. Then, save page layout (Figure 14).

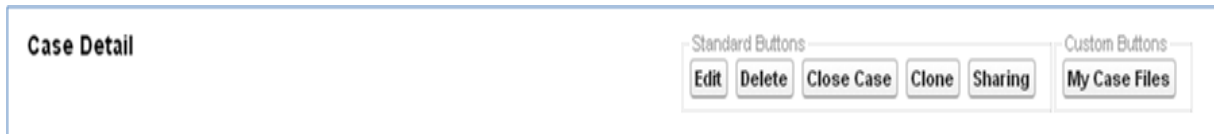


Figure 14

- If you selected Display Type as Detail Page Link, you should drag the custom link to the Custom Links section.

You can now see the *My Case Files* button on Case Detail Page (Figure 15).



Figure 15

After clicking “My Case Files” custom button, you can see S-Drive Attachments files on Mobile Case File Page (Figure 16).

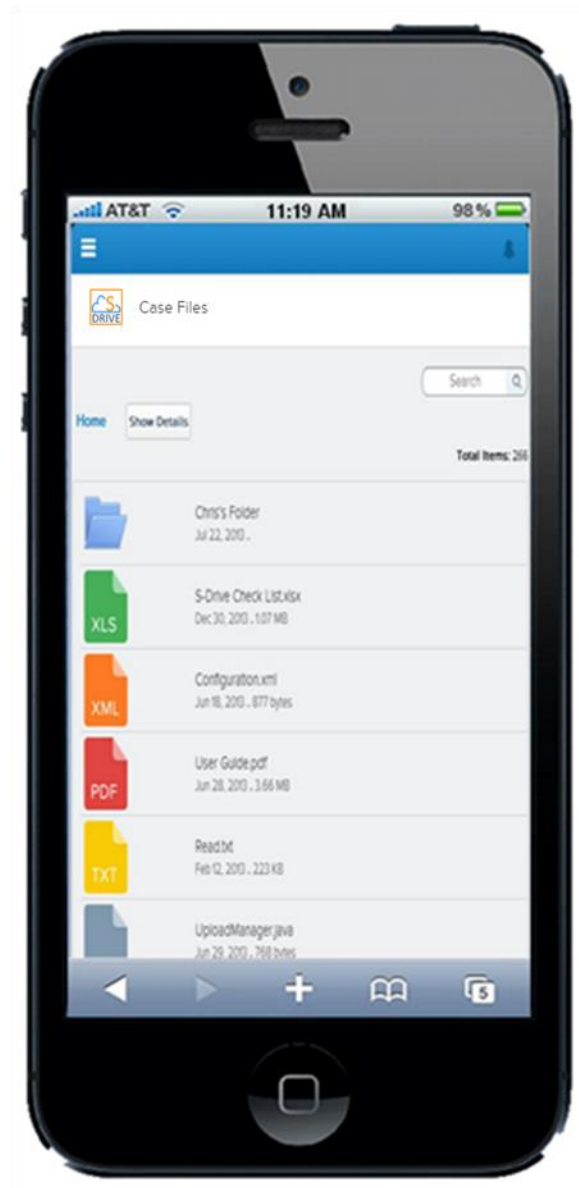


Figure 16

C. For Other Standard/Custom Object's S-Drive Files

For displaying other standard/custom object files on Salesforce Mobile App, you should first create mobile object file page. Then, you should add this page to its page layout.

Example for Example_Object__c (Parent object) and Example_Object_File__c (Child object)

Create Mobile Object File Page

- Go to App Setup > Create > Objects. Click on New Custom Object button (Figure 17).

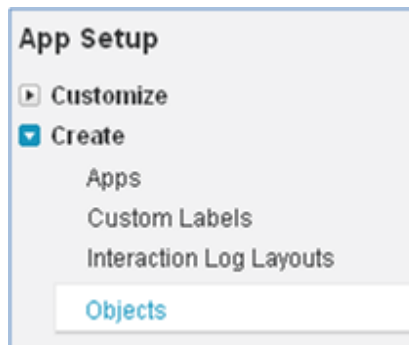


Figure 17

- Give a Label and a Name. Check the *Available for Salesforce mobile apps* (Figure 18).

New Custom Object Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Figure 18

- For creating mobile page content, you will need to use `cg:FileComponent` component tag (Figure 19).

Visualforce Markup
Version Settings



```

1 <apex:page standardController="Example_Object__c" tabStyle="Example_Object__c" showHeader="false" sidebar="false" >
2 <cg:FileComponent
3 customObjectName="Example_Object__c"
4 customObjectFileName="Example_Object_File__c"
5 objectId="{!Example_Object__c.Id}"
6 relationshipName="Parent__r"
7 objectNamespacePrefix=""
8 fileNameNamespacePrefix=""
9 enableFolders="true"
10 enableEmail="true"
11 enableCopyURL="true"
12 enableDelete="true"
13 enableDownload="true"
14 privateEnabled="true"
15 orderBy="File_Name__c"
16 order="asc"
17 loadingSize="50"
18 title="My Example Files"
19 defaultEmailAddress=""
20 />
21 </apex:page>

```

Figure 19

- Basically the page skeleton will be as below:

```
<apex:page standardController="Example_Object__c" tabStyle="Example_Object__c"
showHeader="false" sidebar="false" >
<cg:FileComponent
customObjectName="Example_Object__c"
customObjectFileName="Example_Object_File__c"
objectId="{!Example_Object__c.Id}"
relationshipName="Parent__r"
objectNamespacePrefix="examplnamespaceprefix__"
fileNamespacePrefix="examplnamespaceprefix__"
enableFolders="true/false"
enableEmail="true/false"
enableCopyURL="true/false"
enableDelete="true/false"
enableDownload="true/false"
privateEnabled="true/false"
orderBy="File_Name__c"
order="asc"
loadingSize="100"
title="My Example Files"
defaultEmailAddress="user@company.com"
/>
</apex:page>
```

You need to set these component attributes based on your configuration. Let's explain these components attributes:

standardController

You need to set this standard controller to the object that you want to use with. For our example this is the custom object name that we created: "Example_Object__c". As you can see from the example we appended "__c" to the end of the name. This means, this object is a custom object. You can use standard objects also. For standard objects you will not append "__c" at the end of the object name (e.g. Solution). Also, do not prepend your account's namespace prefix.

tabStyle

This is the tab style of the page. Normally you can set it same with standardController. That means tab style will be derived from the standard controller you chose.

customObjectName

This is the name of the custom or standard object that will be the object that the files will be attached to. For our example, it is “Example_Object__c”. If this is a custom object you need to append “__c” to the end of the name. If this is a standard object you won’t append “__c” at the end of the object name (eg. Solution). Also do not prepend your account’s namespace prefix.

customObjectName

This is the name of the custom object file. This object will be holding the information regarding the attached files. For our example, it is “Example_Object_File__c”. If this is a custom object you need to append “__c” to the end of the name. Also do not prepend your account’s namespace prefix.

objectId

You need to pass in the “{!Example_Object__c.Id}” value for this attribute. This attribute is required to retrieve object id.

relationshipName (optional)

Master-detail relation used for selected standard/custom object. This attribute is optional and default value is 'Parent__r'.

objectNamespacePrefix (optional)

This is the object’s namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you created this custom object inside your organization, your object namespace prefix is same with your organization namespace prefix. If this object belongs to a managed package, you need to use that managed package’s namespace prefix. If your object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is “examplnamespaceprefix” you need to set objectNamespacePrefix as “examplnamespaceprefix__”.

fileNamespacePrefix (optional)

This is the file object’s namespace prefix that your Salesforce.com organization uses. If your organization has a namespace prefix and you created this custom object file inside this organization, your file namespace prefix is same with your organization namespace prefix. If this file object belongs to a managed package, you need to use that managed package’s namespace prefix. If your file object does not belong to any namespace you do not need to set this attribute. If your namespace prefix is “examplnamespaceprefix” you need to set fileNamespacePrefix as “examplnamespaceprefix__”.

enableFolders (optional)

This option is used to enable/disable folders support for S-Drive Attachments. Set this attribute false to disable folders. If you disable folders for S-Drive Attachments, folders breadcrumb will be removed. This configuration won’t hide/delete currently created folders. The default for this attribute is true.

enableEmail (optional)

This option is used to enable/disable “Email” button in the page. There are two possible values for this attribute: “true”, “false”. If “false” is set “Email” button won’t be displayed in this page. This field is optional and if you don’t provide a value for this field, it will be set as “true”; therefore “Email” button will be visible. Note that security and permission settings override this option.

enableCopyURL (optional)

This option is used to enable/disable “Copy URL” button in the page. There are two possible values for this attribute: “true”, “false”. If “false” is set “Copy URL” button won’t be displayed in this page. This field is optional and if you don’t provide a value for this field, it will be set as “true”; therefore “Copy URL” button will be visible for. Note that security and permission settings override this option.

enableDelete (optional)

This option is used to enable/disable “Delete” button for the page. There are two possible values for this attribute: “true”, “false”. If “false” is set “Delete” button won’t be displayed in this page. This field is optional and if you don’t provide a value for this field, it will be set as “true” therefore, “Delete” button will be visible. Note that security and permission settings override this option.

enableDownload (optional)

This option is used to enable/disable “Download” button for attachment in the page. There are two possible values for this attribute: “true”, “false”. If “false” is set “Download” button won’t be displayed in this page. This field is optional and if you don’t provide a value for this field, it will be set as “true” therefore, “Download” button. Note that security and permission settings override this option.

privateEnabled (optional)

This option is used for enabling public/private file access to the S-Drive attachments and commonly used to limit the customer portal users’ access to individual files. Before setting this property, you need to add a new field to your custom object file named ‘Private’. Set this attribute to true if you want to enable private/public flag. Setting the private flag on a file hides the file from customer portal users. There are two possible values for this attribute: “true”, “false”. The default for this attribute is “false”.

orderBy (optional)

This option is used to order/sort S-Drive attachments based on a field. You need to set the name of the field that should be used to order the list of files without namespace prefix. This attribute is optional and leaving this empty will not order the results in any specific order. The default for this attribute is “File_Name__c”. Note that Salesforce does not allow Long Text Area fields to be ordered/sorted. So if you want to order/sort by a long text area field (e.g. Description__c), you need to change its type from ‘Long Text Area’ to ‘Text Area’. This will limit your description to be 255 characters long.

order (optional)

This option is used to order/sort S-Drive attachments based on a field (orderBy) ascending or descending. There are two possible values for this attribute: "asc", "desc". The default for this attribute is asc.

loadingSize (optional)

This option is used to set the number of items loading at a time. Attachment items will be loaded based on this value. So, if this value is set to '30', and object has 91 total items, you will click 'Load More' link on file page 4 times. This attribute is optional and default value is 100.

Note: If you have more than 1000 files, Files page will be paginated and you will see the 1001th file on next file page by clicking Next Page link. The pagination is for performance reasons.

title (optional)

This is the title of the page. You can set it to "Custom Object Name" Files. For our example it will be "Example Object Files". This field is optional and if you don't provide a value for this field, it will be set as "Attached Files".

defaultEmailAddress (optional)

You can use this option, if you want to set a default "TO" email address on Email page for sending emails from your S-Drive Attachments. This option is automatically set for out of the box Contact, Opportunity, Case and Account S-Drive Attachments. For example, if you select a Contact S-Drive Attachment for a contact and click "Email Selected" button, "Email Files" screen will be opened and "To..." field will be filled with the contact name. If default email address is not found in your Salesforce Contacts, that email will be set to the "Additional To..." section of the "Email Files" page. These "To..." or "Additional To..." fields are auto-filled when "Email Files" page is loaded. You can clear them and/or select other contacts as you wish.

- After setting the page based on above component attributes, then click Save.
- Set the security for your page on other profiles. Go to Develop > Pages and click Security link next to your page name (Figure 20).

Action	Label	Name	Namespace Prefix	Api Version
Edit Del Security 	MobileExampleObjectPage	MobileExampleObjectPage		29.0

Figure 20

- Move all profiles (or select based on your needs) from Available Profiles section to Enabled Profiles (Figure 21).

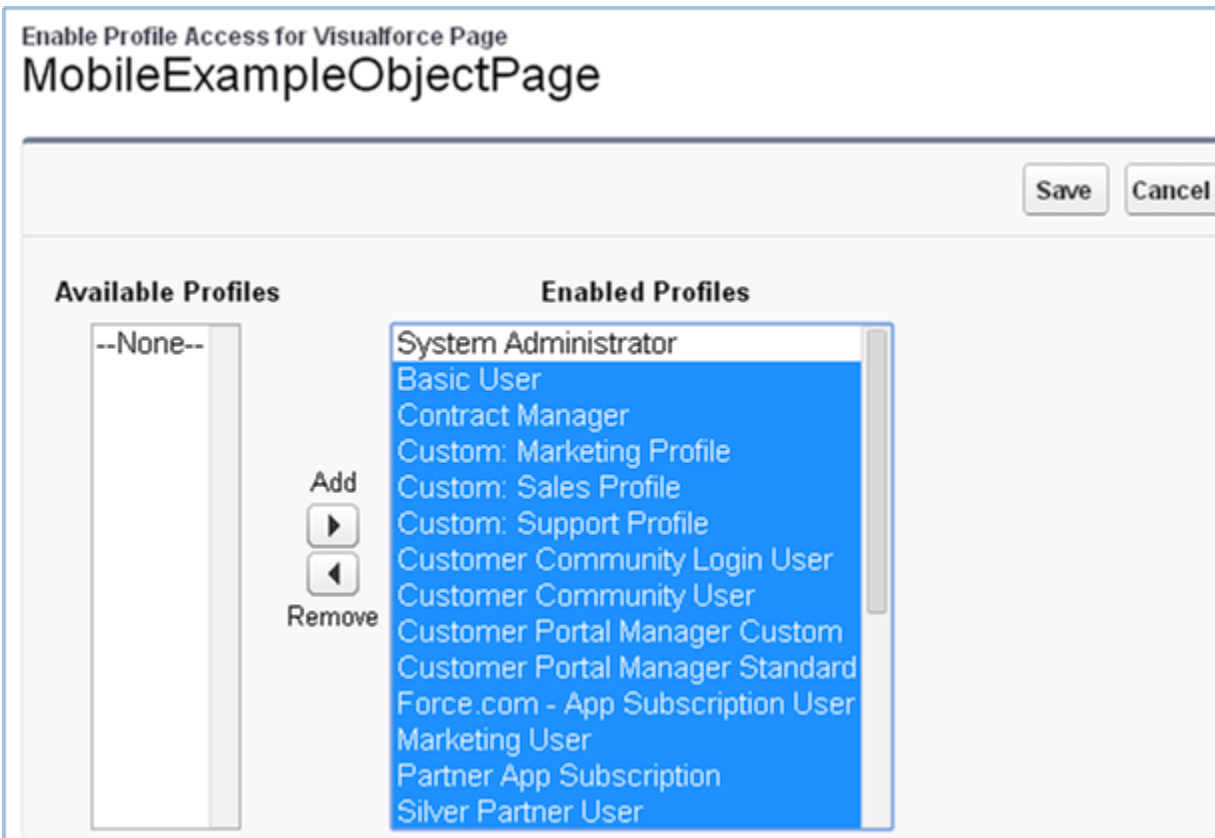


Figure 21

- If you skip this step, your users that belong to the disabled profiles will see an error page (Figure 22).

Insufficient Privileges

You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary.

Figure 22

There are two options for adding mobile object file pages. Adding as a Mobile Card and adding custom button or link.

Option 1: Add As a Mobile Card (Option1)

- Go to *Create>Objects>Example Object*. If you want to create standard object file page, you should go to *Customize>Standard Object>Page Layout* (Figure 23).

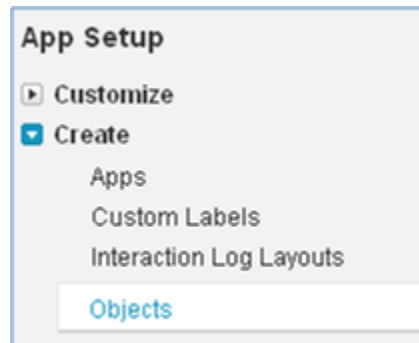


Figure 23

- Click *Edit My Example Object Page Layout* section. You can see *MobileExampleObjectPage* on Visualforce Pages section of its layout (Figure 24).

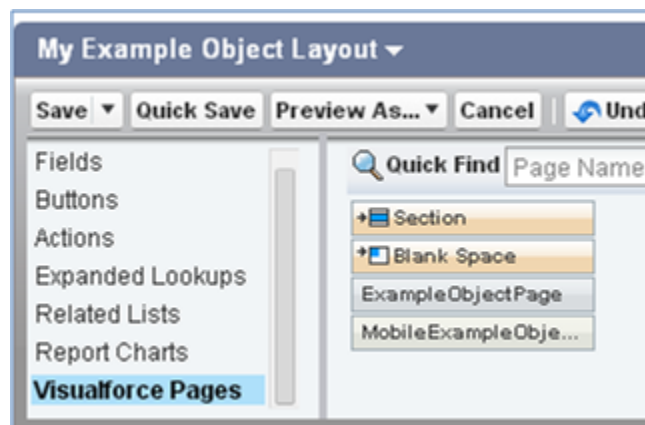


Figure 24

- Drag *MobileExampleObjectPage* visualforce page to the Mobile Cards section(Figure 25).

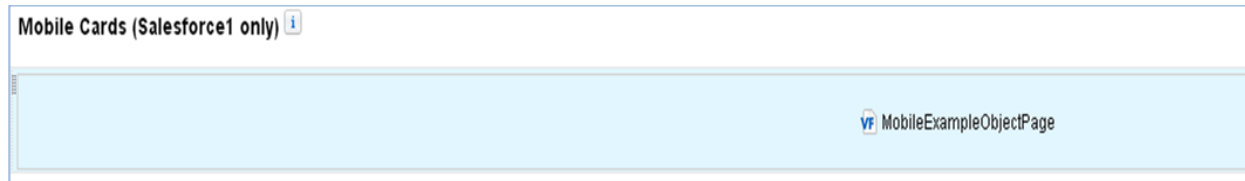


Figure 25

- Edit properties. Then, Save page layout (Figure 26).

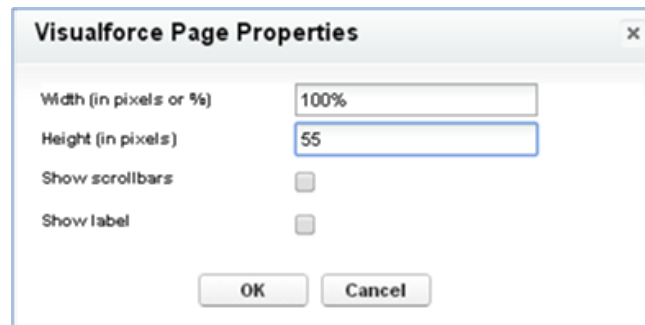


Figure 26

You can now see the Mobile Card on Related Items section of Example Object Detail Page (Figure 27).

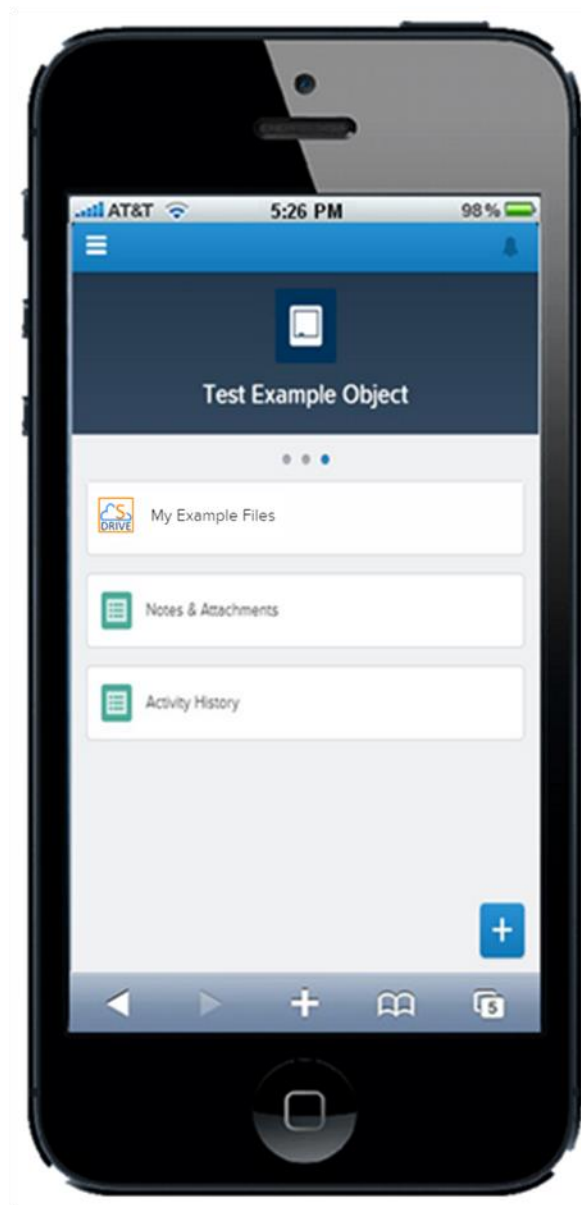


Figure 27

Option 2: Add as a Custom Button or Link (Option2)

- Go to *Create>Objects>Example Object >Buttons, Links and Actions*. If you want to create standard object file page, you should go to *Customize>Standard Object>Buttons, Links and Actions* (Figure 28).

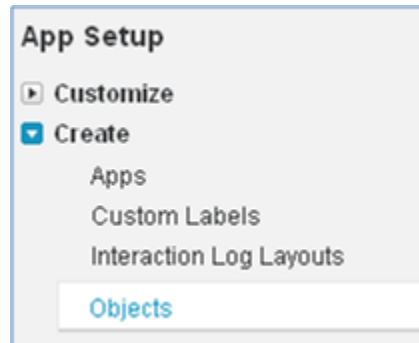


Figure 28

- Click on *New Button or Link*. Give a Label and a Name. Select Display Type and Behavior. Select *MobileExampleObjectPage* content. Then, click Save (Figure 29).

Edit Example Object Custom Button or Link

My Example Files

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label My Example Files

Name My_Example_Files ⓘ

Description

Display Type

☐ Detail Page Link [View example](#)
☒ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior Display in new window [View Behavior Options](#)

Content Source Visualforce Page

Content MobileExampleObjectPage [MobileExampleObjectPage]

Figure 29

- Click *Edit Case Page Layout*. You can see *My Example Files* custom button on Buttons section of its layout (Figure 30).

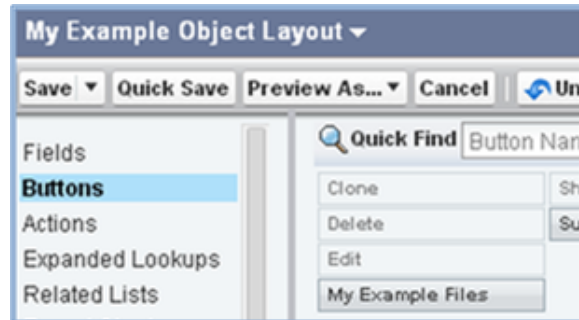


Figure 30

- Drag *My Example Files* button to the Custom Buttons section. Then, save page layout (Figure 31).



Figure 31

- If you selected Display Type as Detail Page Link, You should drag the custom link to the Custom Links section.

You can now see the *My Example Files* button on Example Object Detail Page (Figure 32).

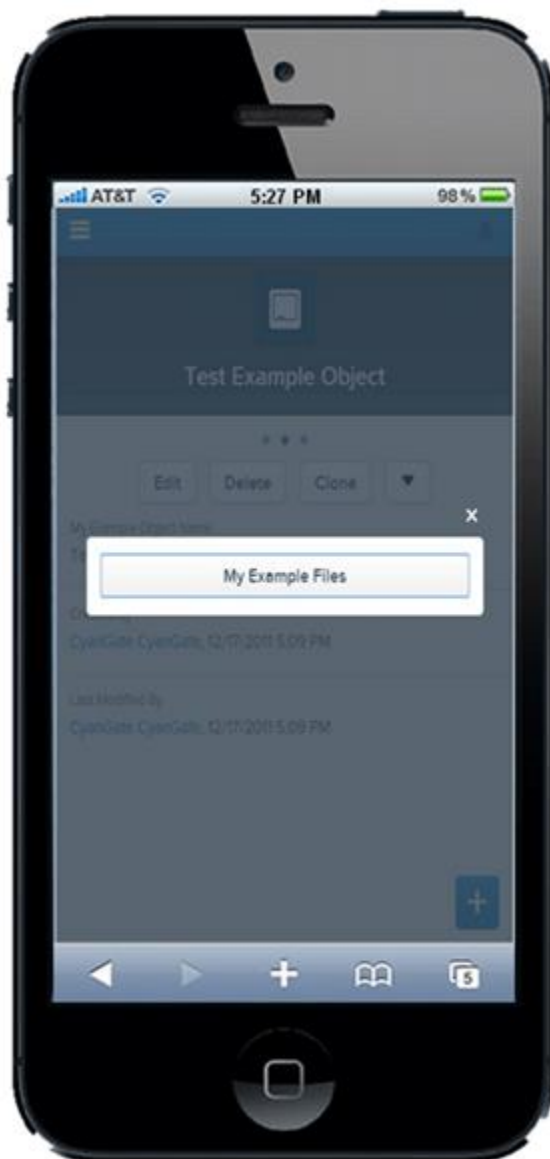


Figure 32

After clicking on the My Example Files button, you can see Example Object's S-Drive files on Example Object File Page (Figure 33).

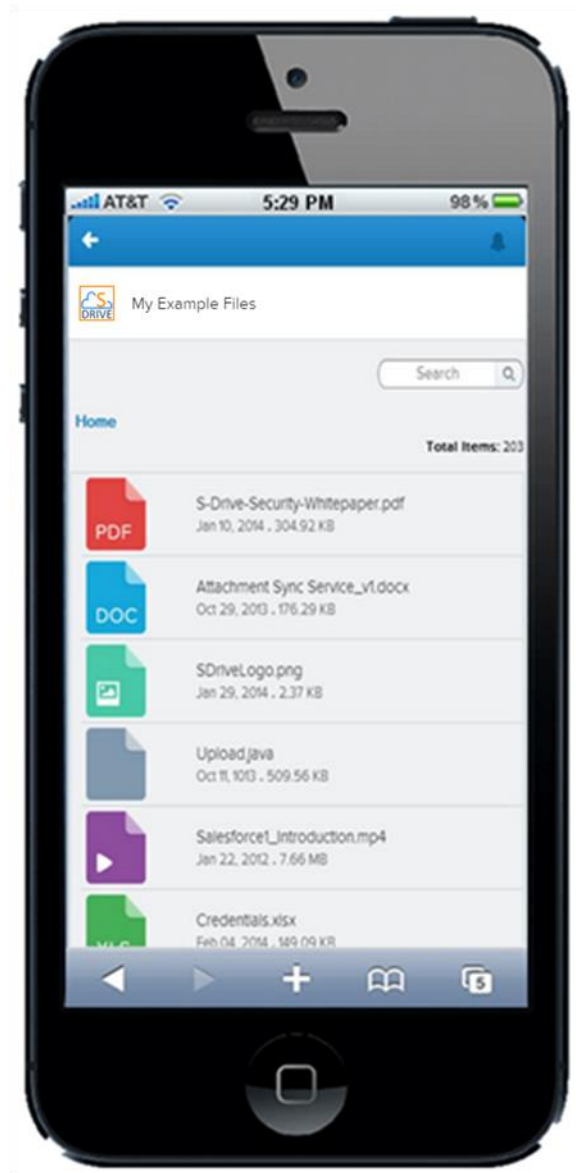
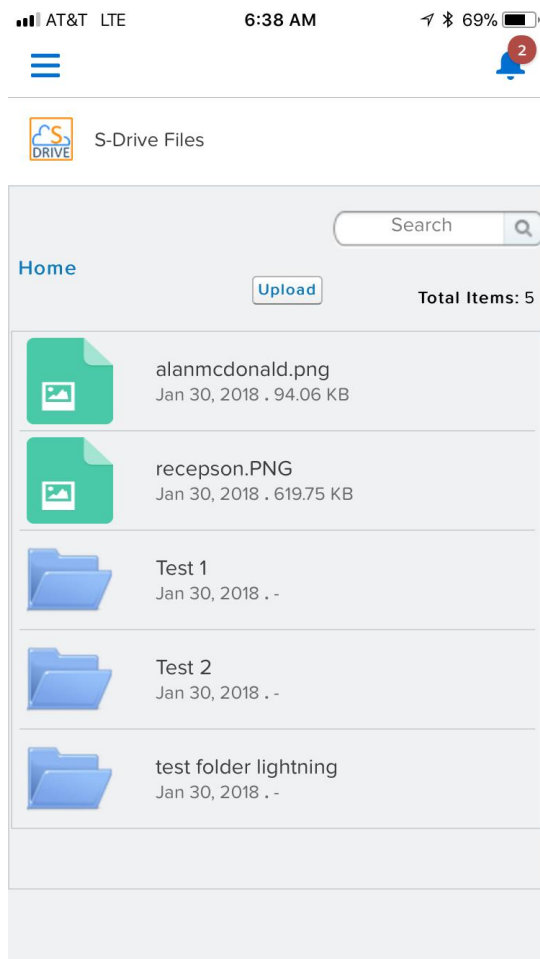


Figure 33

D. Actions on S-Drive File' Detail Page

1. Upload File to S-Drive

In order to upload file to S-Drive, click on the *Upload* button (Figure 34).



2. Download/Open S-Drive File

In order to download/open the S-Drive file, you should click on the *Download* button (Figure 35).



Figure 35

3. Delete S-Drive File

In order to delete the S-Drive file, you should click on the *Delete* button (Figure 36).

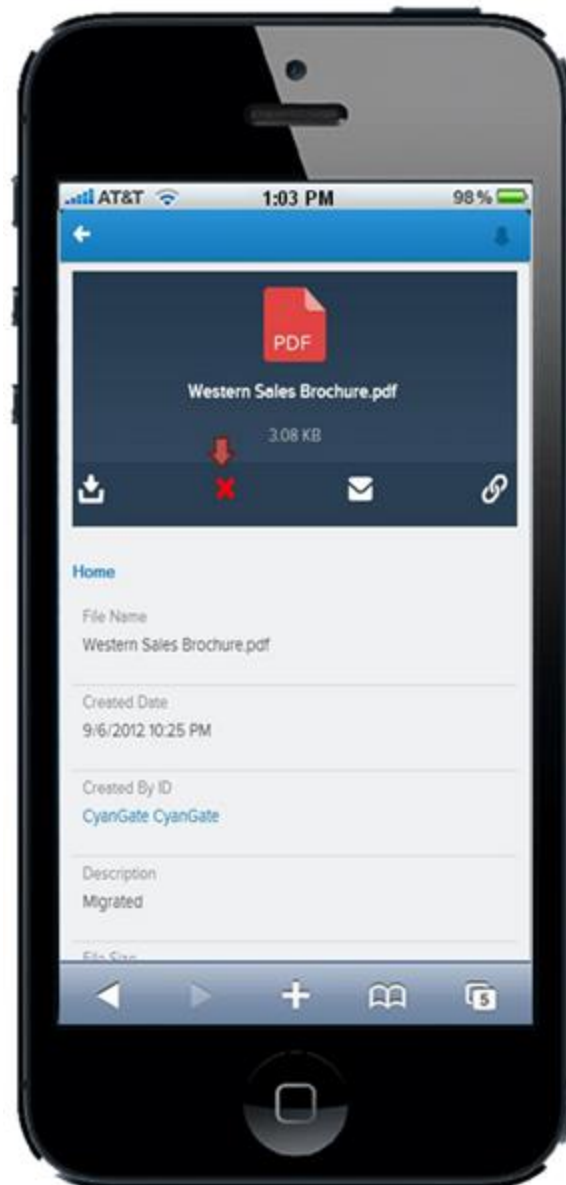


Figure 36

You can delete the S-Drive file by clicking on *Delete* button and you can cancel to delete the S-Drive file by clicking on *Cancel* or *X* button (Figure 37).

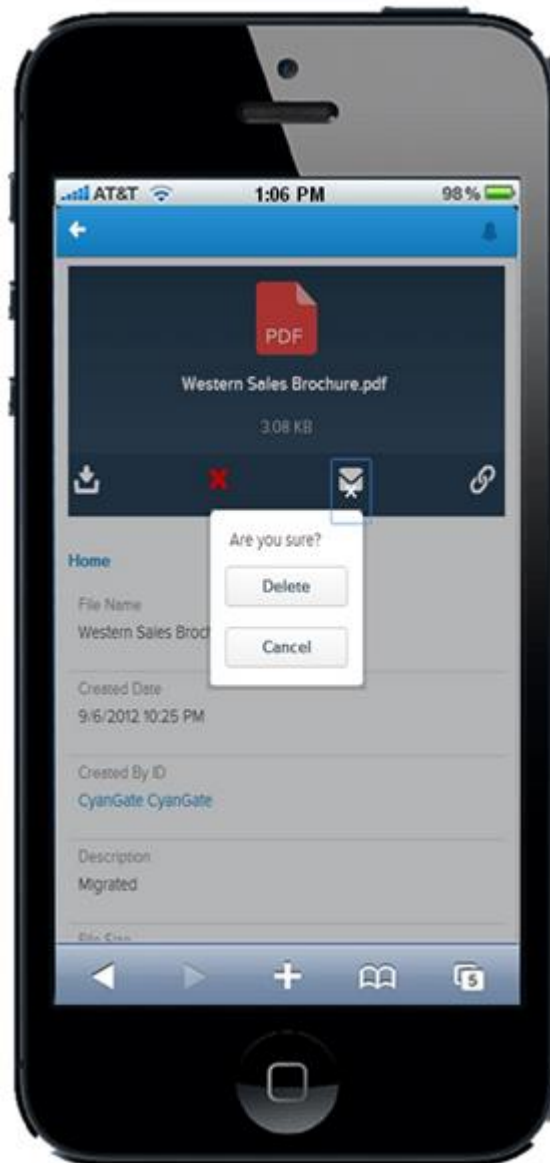


Figure 37

4. Send Email with S-Drive File

In order to send Email with an S-Drive file, you should click on the *Email* button (Figure 38).

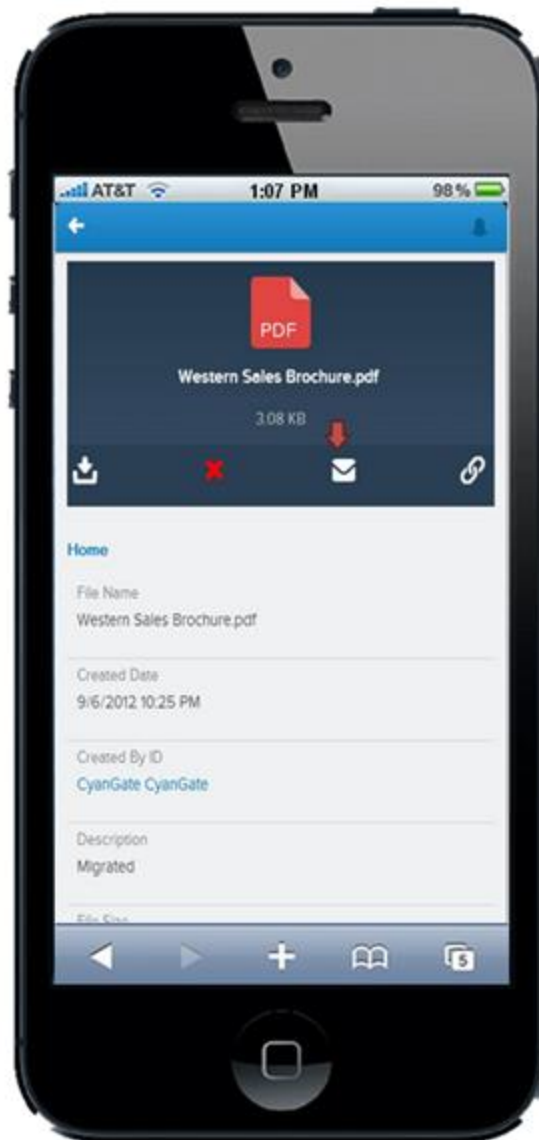


Figure 38

5. Copy Url for S-Drive File

In order to copy Url for an S-Drive file, you should click on the *Copy Url* button (Figure 39)

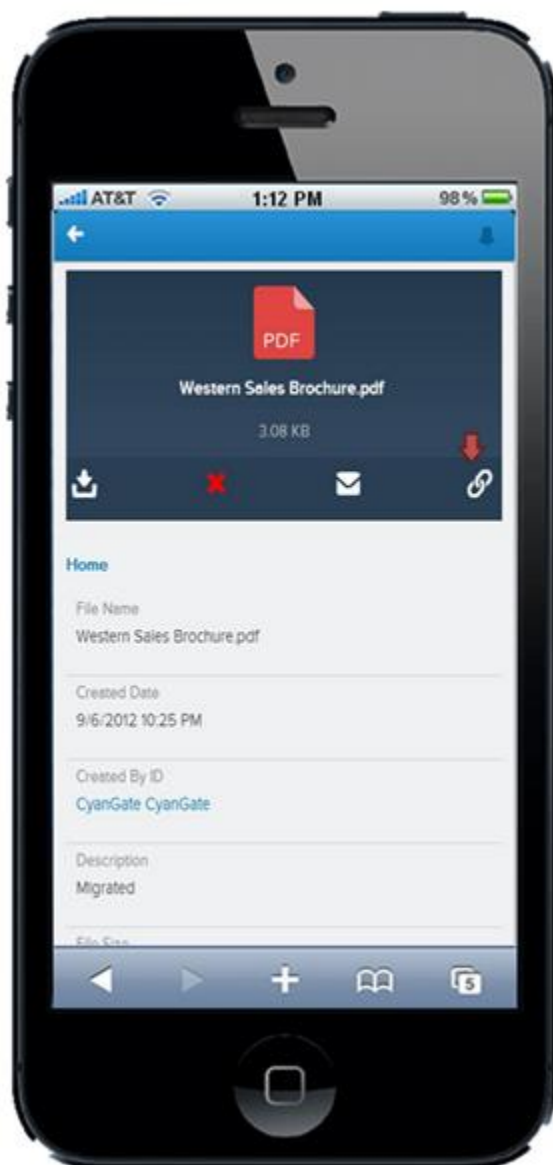


Figure 39

You can select the url of to the S-Drive file by clicking on *Select Url* button and You can cancel to select url the by clicking on X button (Figure 40).

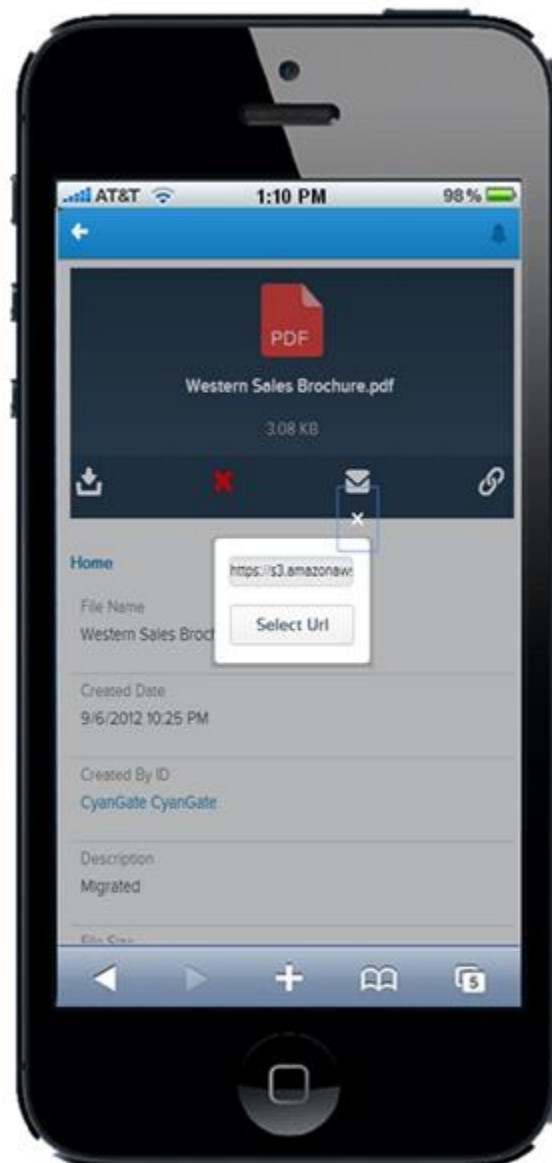


Figure 40

6. Back to Home Page

For Back to the Home Page, you should click the *Home* link (Figure 41). If there is any folder breadcrumb link, you can also navigate back to this folder by clicking on the folder name.

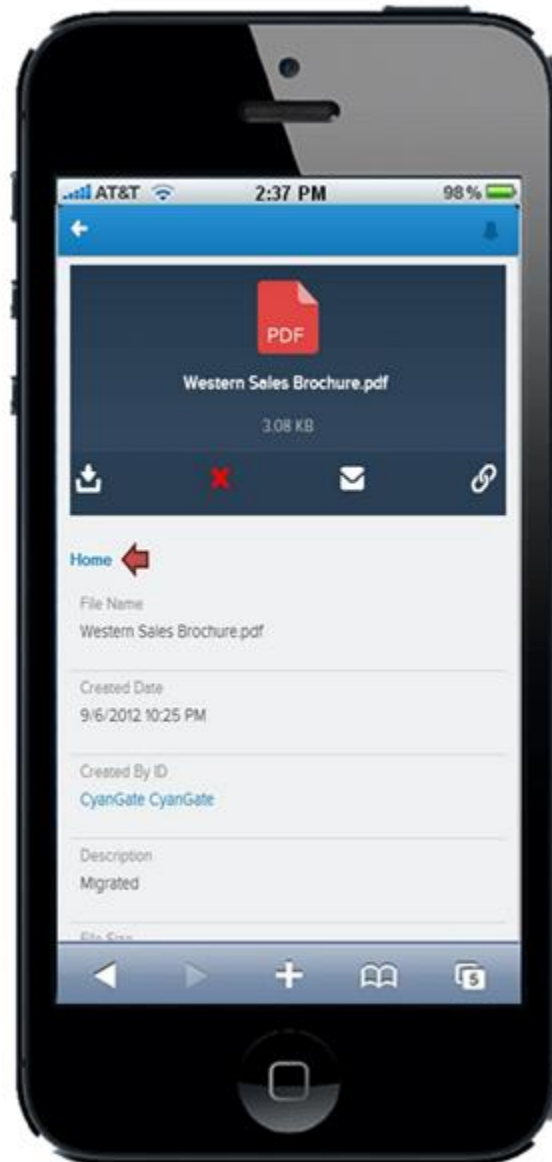


Figure 41

E. 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