

S3-Link Deployment Guide

Introduction

S3-Link connects Salesforce to Amazon S3. Import files from Amazon server to Salesforce org. Store file(s) related to any Salesforce object on Amazon Server without any limit. Control access for file(s) on Amazon. Tracks download history for file(s). It provides support for the hierarchical file system.

The S3-Link application is available as a managed package that can be installed on an existing Salesforce installation.

Prerequisite

1. Sign Up for Amazon S3

To start with S3-Link, you must have AWS Key Id and Secret Access Key. For that you need to Sign Up for Amazon. If you already have an Amazon S3 account just ignore it. Otherwise follow the S3 Link Amazon Sign up Guide document.

S3-Link deployment with new Salesforce installations

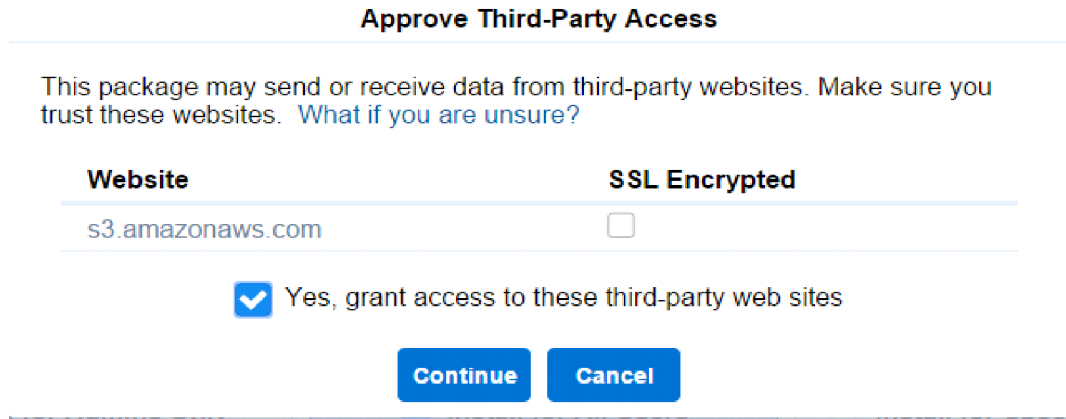
1. Installing the S3-Link package

The S3-Link application is installed as a managed package in an existing Salesforce installation. To start the S3-Link installation, click on the URL provided by Neilon team and login in the org you want to install the package

Salesforce provides single step installation. Before clicking on Install, follow the steps given below.

1. Enter the password (if you have been provided)
2. Select option **Install for Admin Only**
3. Click **Install**

4. Approve Third-Party Access and **Continue**.



The installation will take a few minutes to complete. Once the installation is finished, you will receive a confirmation email.

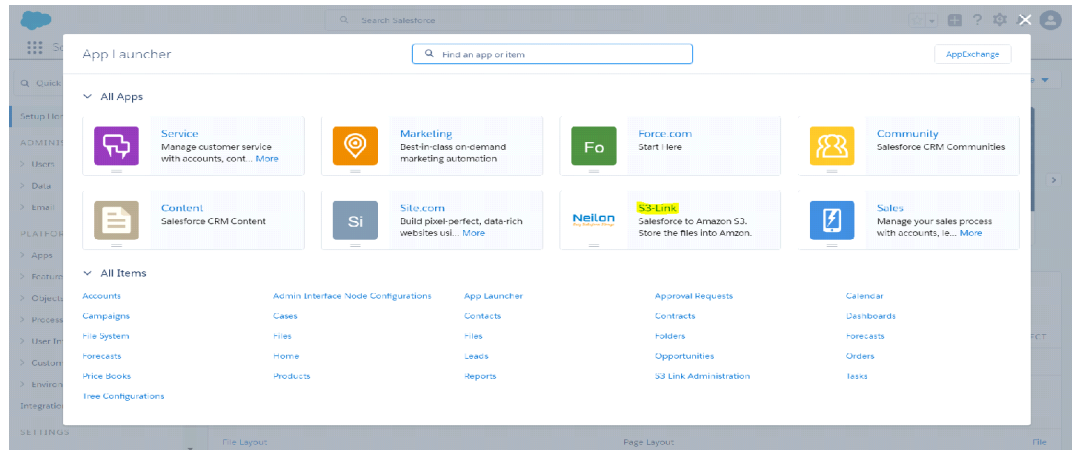
2. **Enable Visualforce pages as Iframes in Salesforce org(if disabled)**

We are using visualforce pages to allow System Admin to configured S3-Link from S3-Link Administration. We open these visualforce pages as iframes in S3-Link Administration. If iframes are blocked in your org, these configuration pages will not load. Please follow the steps in the **S3-Link Iframes with Clickjack Protection** guide to enable our visualforce pages as iframe in your.

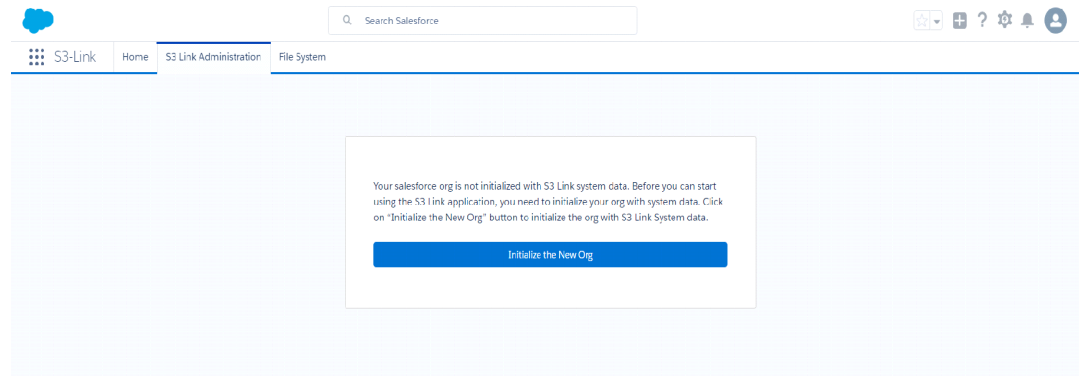
3. **Initializing the application configuration**

Once the S3-Link package is installed, you need to initialize the application configuration.

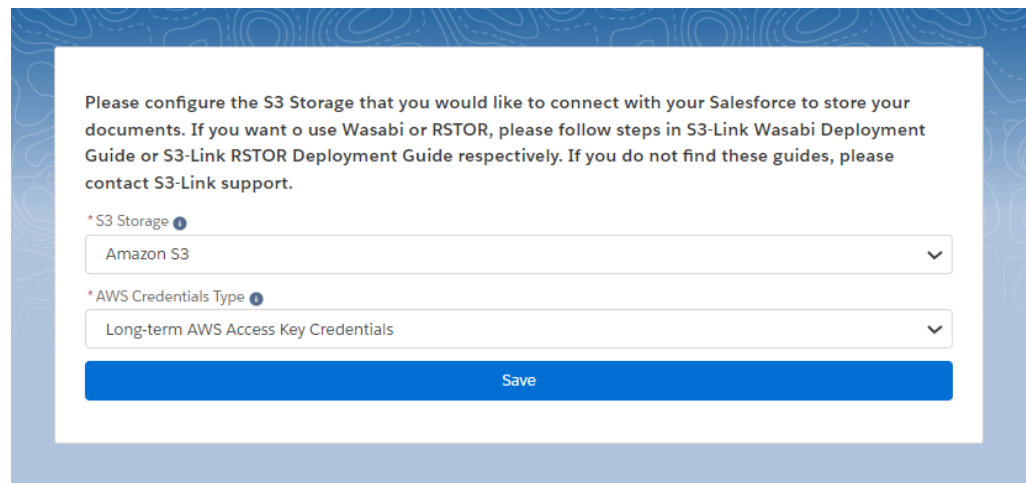
1. From the Application Launcher, select **S3-Link**.



- Now, select the **S3 Link Administration** tab. From this display, click the **Initialize New Org** button.



- Select **Amazon S3** in S3 Storage



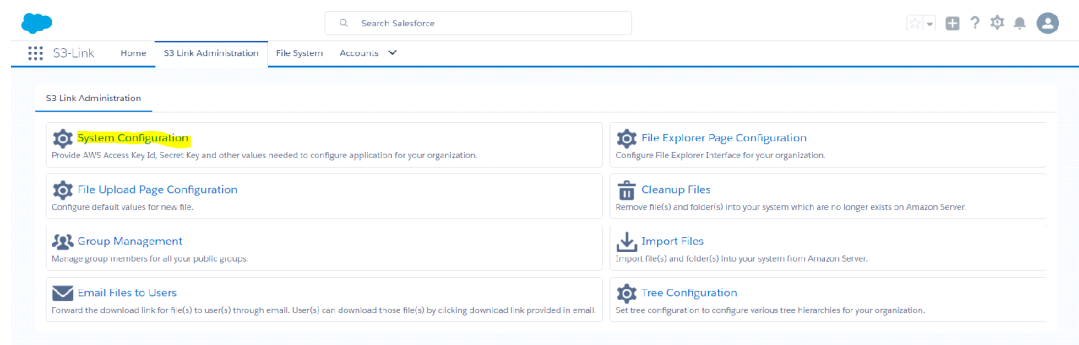
- Click **Save**

The application configuration is now initialized.

4. Updating system properties

After initializing the S3-Link configuration, you need to set up a couple of system properties specific to each customer's environment.

- From the **S3-Link Administration** tab, click **System Configuration**.



2. Set the **AWS Access Key Id** and **AWS Secret Key** properties you get at the time of Amazon Sign Up. Click Save.

S3-Link Administration > SYSTEM CONFIGURATION

System Configuration

Provide AWS Access Key ID, Secret Key and other values needed to configure application for your organization.

AWS Access Key Id

AWS Secret Key

KMS Master Key

"From" Email Address for Job Status

Grant Modify All Access to S3-Link Users

Link Files to Multiple Records

5. Manage Amazon buckets

System Admin can manage Amazon buckets. System admin can create new buckets as well as link available buckets on Amazon Server to Salesforce. All buckets linked to Salesforce will be displayed on File Explorer pages as a root node so avoid linking too many buckets. Follow below steps to link or create Amazon S3 buckets.

1. Link existing Amazon S3 Buckets

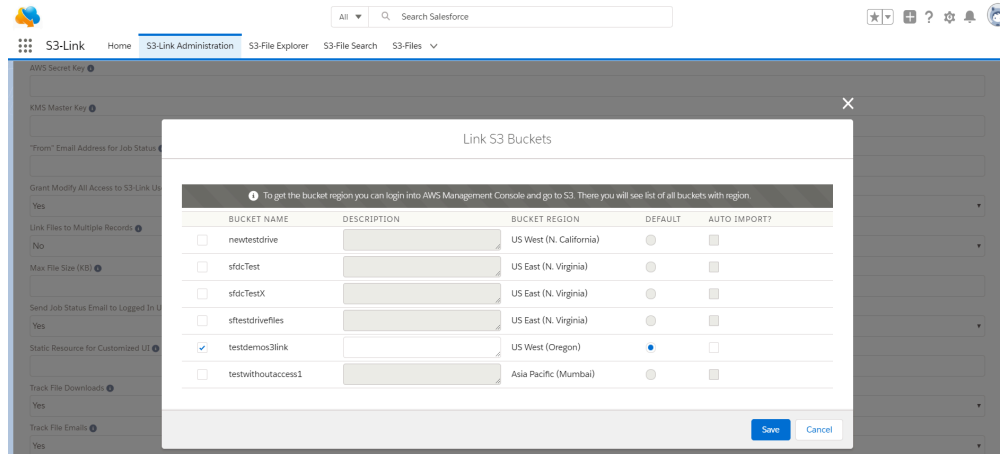
Follow below steps to link existing Amazon S3 bucket

1. Click **Link Buckets** in Buckets section

BUCKET NAME	DESCRIPTION	BUCKET REGION	DEFAULT	FILE VERSIONING?	AUTO IMPORT?	ACTION
testdemos3link		US West (Oregon)	✓	✓	<input type="checkbox"/>	📄 ✕

2. If there are any buckets available on Amazon S3, it will be displayed there. Select buckets you want to link with your Salesforce org. Set one bucket as **Default**. All

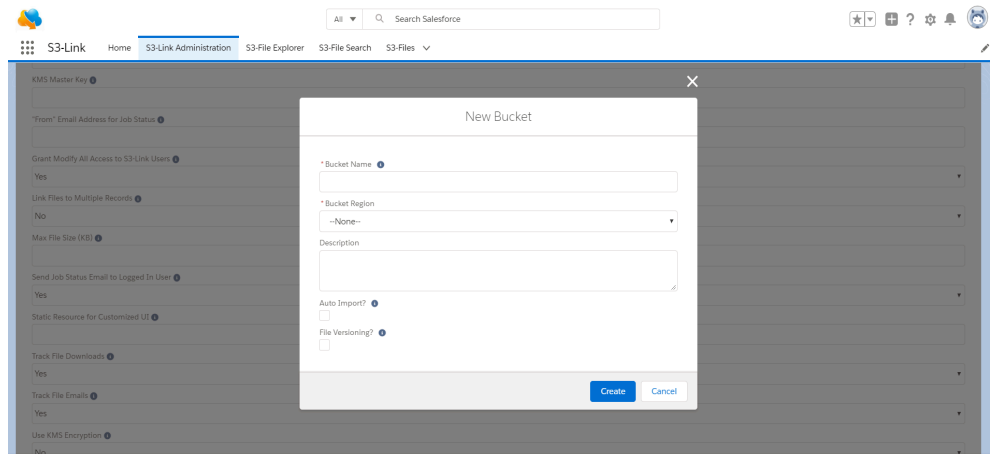
files attached to any Salesforce records will go into the default bucket.



3. Click **Save**
2. **Create Amazon S3 Bucket**

Follow below steps to create new Amazon S3 bucket

1. Click **Create Bucket** in the Buckets section.
2. Provide the Bucket Name and Bucket Region



3. Click **Create**
6. **Assign permission sets to users**

Follow below steps to assign our permission set to your users

1. Go to S3-Link Administration > S3-Link Access Management
2. Click **Grant Access to All**
7. **Configure S3-Link for Salesforce objects (Optional)**

S3-Link allows you to attach files to any Salesforce object. Once you configure it for a Salesforce object, you will see the related list for file on layout for those objects. From there you can add/delete related files. To configure it, follow S3 Link for Salesforce Objects document.

8. Add S3-File Search component in the Salesforce Record detail pages

In order to allow end users to attach files to Salesforce records, you will have to add our S3-File Search component in your Salesforce record detail pages. S3-File Search component will display a list of all S3-Files attached to the Salesforce record and it will also allow users to upload new files. Follow below steps to add our S3-File Search component in the Salesforce record pages.

1. Open the record list(list view) of Salesforce standard or custom object for which you want to enable attaching S3-Files.
2. Open one Salesforce record detail from the list
3. Click the Setting or gear icon on the top right corner and click **Edit Page**
4. Search for S3-File Search in Components section
5. Drag & drop our our **S3-File Search** component in your Salesforce record detail page

The screenshot displays the Salesforce Lightning App Builder interface. On the left, the 'Components' panel is open, showing a list of components. The 'S3-File Search' component is highlighted with a red box. The main area shows a record detail page for 'Burlington Textiles Corp of America'. The 'S3-File Search' component is being dragged into the page layout, and a preview of the component is shown on the right. The preview includes a search bar, a search button, and a list of S3-Files (currently empty). The right sidebar shows the configuration options for the 'S3-File Search' component, including search ID, record ID, list label, filter fields, result fields, actions, and mass actions.

6. Click **Save**