

S3-Link File Explorer User Guide

Introduction

S3-File Explorer component will allow users to create folder structures for the Salesforce record and also upload and download files inside those folder structures. It will also allow users to perform various file actions like Download, Preview, Delete, Copy, Move, New Version, Send Email, Share Link, and Open Link. Your System Admin can also enable some custom actions as well.

Prerequisite

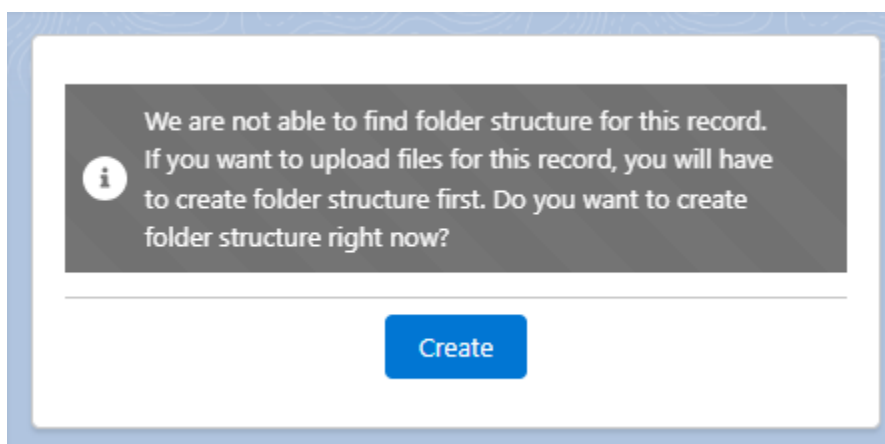
To use the below features, your System Admin must add the **S3-File Explorer** component to your Salesforce record detail page. Please request your System Admin to follow the steps in the **S3-Link File Explorer Setup** to enable all the below features.

Functionality Overview

You can use the below functionalities by enabling this component. In this guide, we have covered it for Account records. But you use this for any other Salesforce records.

Create Record Name folder for the Salesforce record

1. Open Account record detail
2. Find File Explorer section
3. If there are no files uploaded to the Account record, a message will be displayed along with a **Create** button to create the folder structure for the account record
4. Click **Create**



5. The Account Name folder will be created and linked with the Account record

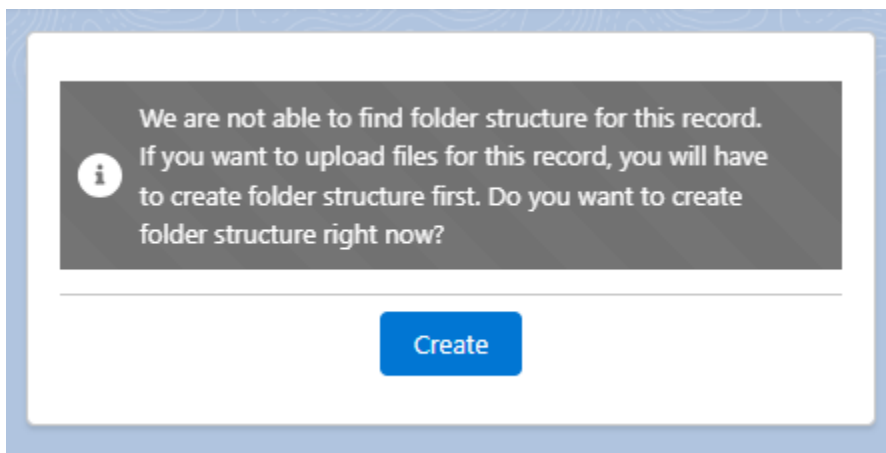
Notes:

1. Going forward this Account Name folder will be loaded in the File Explorer section and it will also be used when files will be uploaded from this Account record detail page.
2. If you have enabled the auto export of Salesforce files, this folder will be automatically created

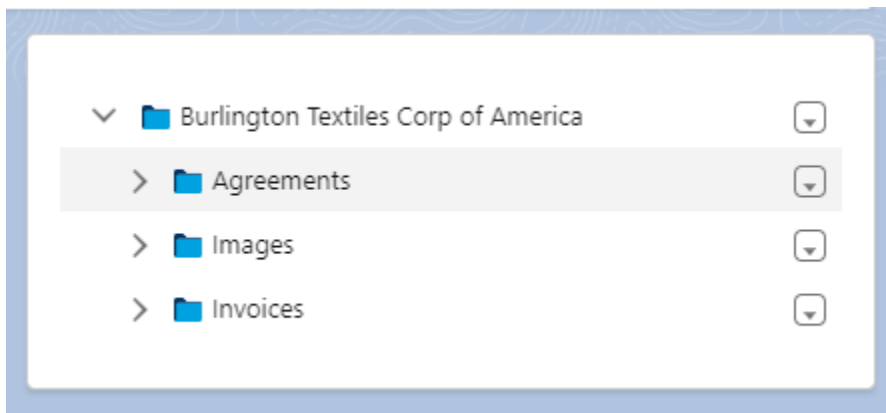
Create Record Name Folder with Sub Folders(Automatically)

You can auto create subfolders along with the record name folder on folder structure creation for Salesforce records. Follow below steps for that.

1. Open Account record detail
2. Find the File Explorer



3. Click **Create**
4. Below folder structure will be created

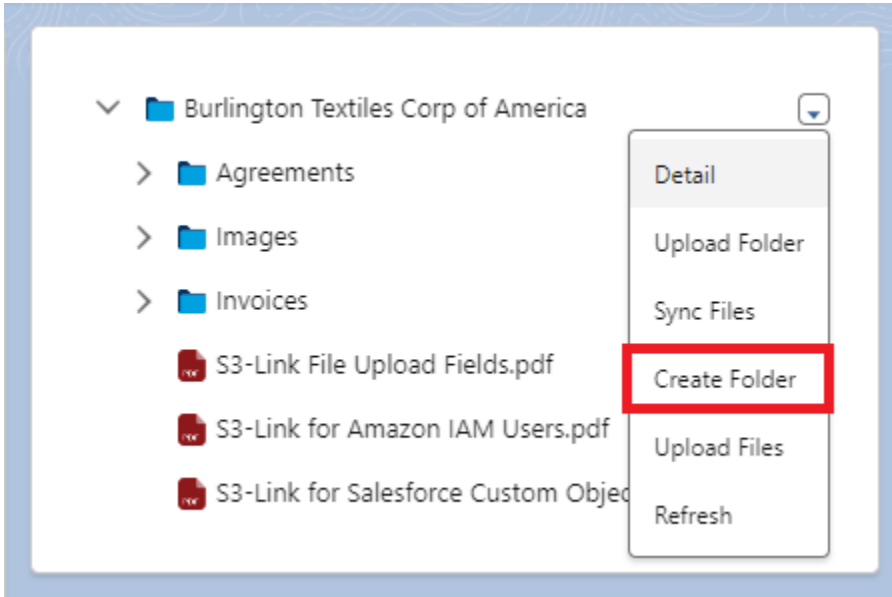


Note: If subfolders under record name folder are not getting created, please contact your System Admin and request to enable it by following steps in the **S3-Link File Explorer Setup**

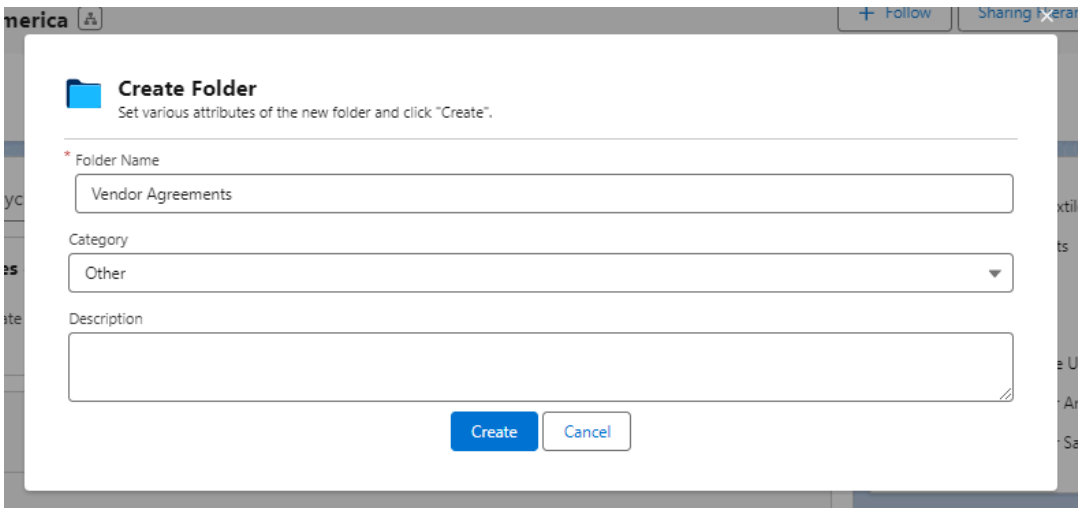
Create Sub Folder(Manually)

You can manually create an additional sub folder inside the record name folder or other sub folders. Follow below steps to manually create a subfolder.

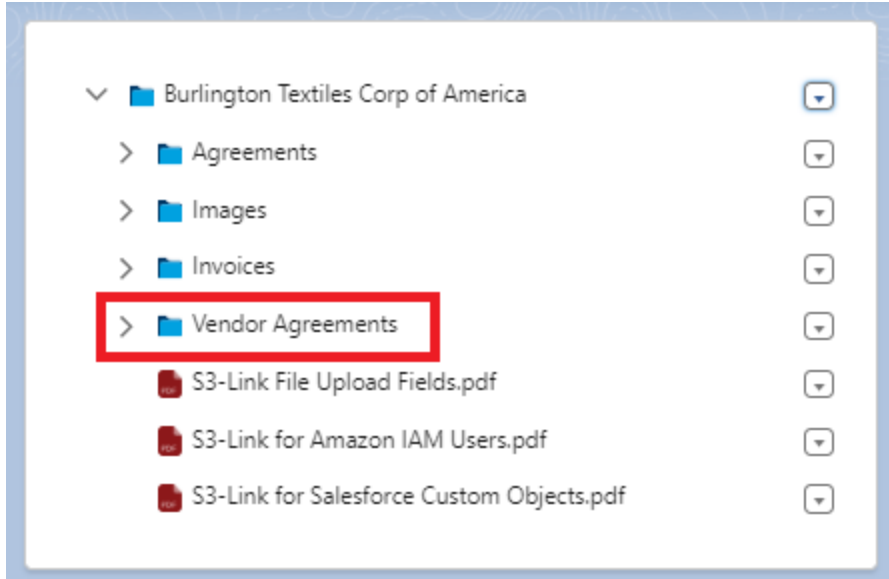
5. Open Account record detail
6. Find the File Explorer
7. Click the menu for the S3-Folder for which you want to create subfolder
8. Click **Create Folder**



9. A pop-up will open. Provide Folder Name and Category and click **Create**



10. After that you will see new folder in the folder structure

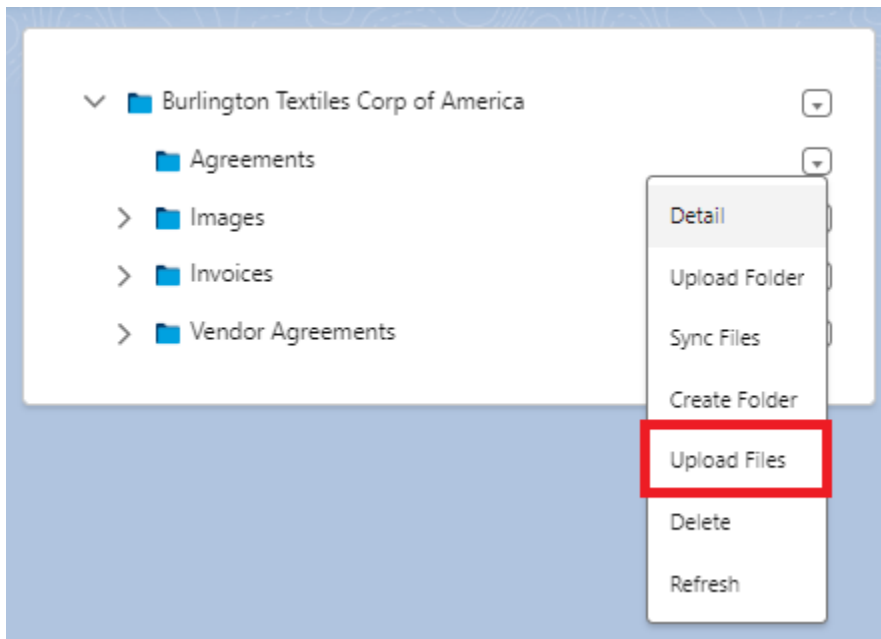


Note: If you do not see the Create Folder action for S3-Folders, please contact your System Admin and request to enable it by following steps in the **S3-Link File Explorer Setup**

Upload Files

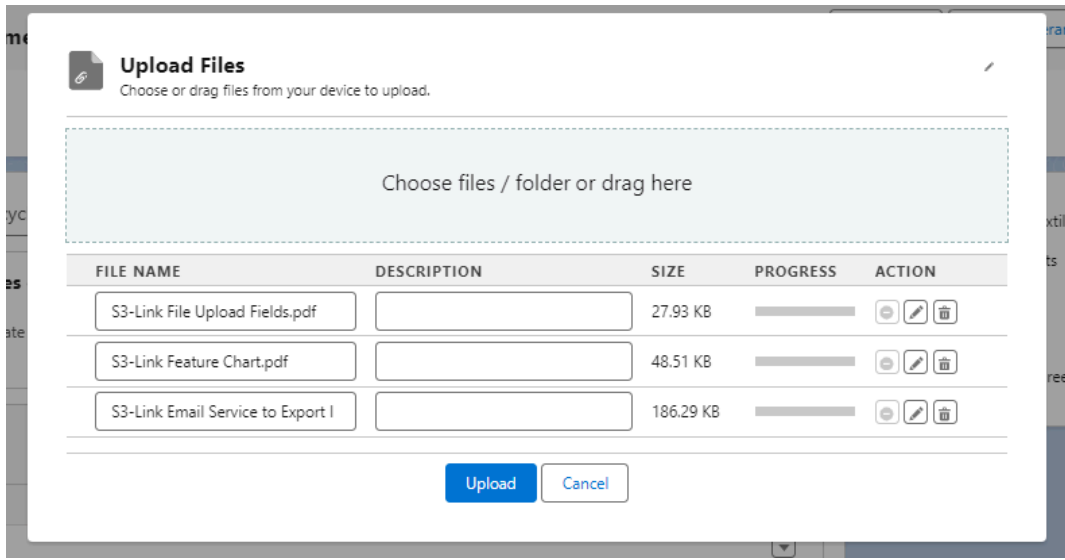
You can upload files inside any folders in File Explorer. Follow below steps to upload files inside folders.

1. Open Account record detail
2. Find the File Explorer
3. Click the menu for the S3-Folder where you want to upload files

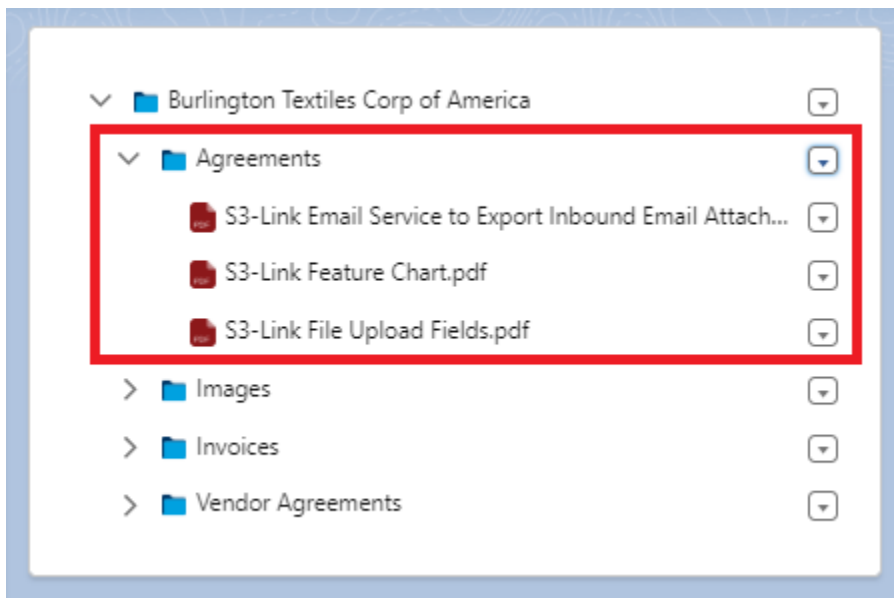


4. A pop-up for file upload will open
5. Click on Choose files and select files you want to upload from your local storage

6. Click **Upload**



7. After upload is successful, new files will displayed in File Explorer



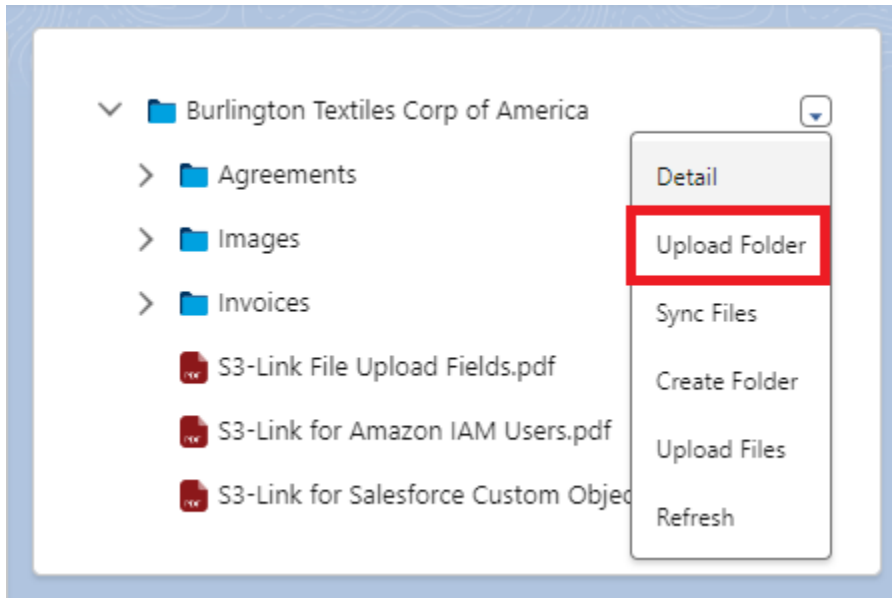
Note: If you do not see the Upload Files action for S3-Folders, please contact your System Admin and request to enable it by following steps in the **S3-Link File Explorer Setup**

Upload Folder

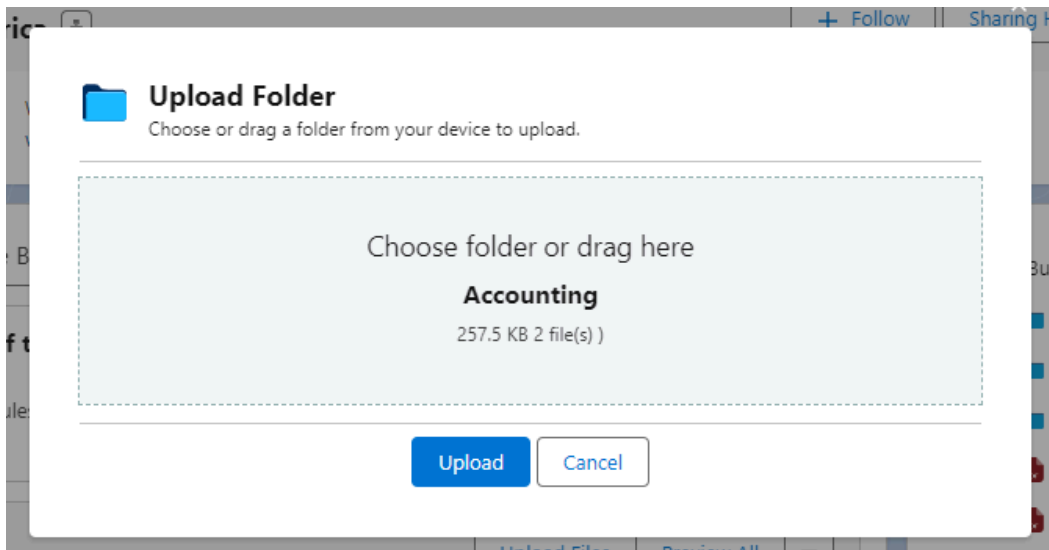
You can upload a local folder(with whole folder structure) in Amazon S3 from Explorer. Follow below steps to upload a local folder in Amazon S3.

1. Open Account record detail
2. Find the File Explorer
3. Click the menu for the S3-Folder where you want to upload the folder

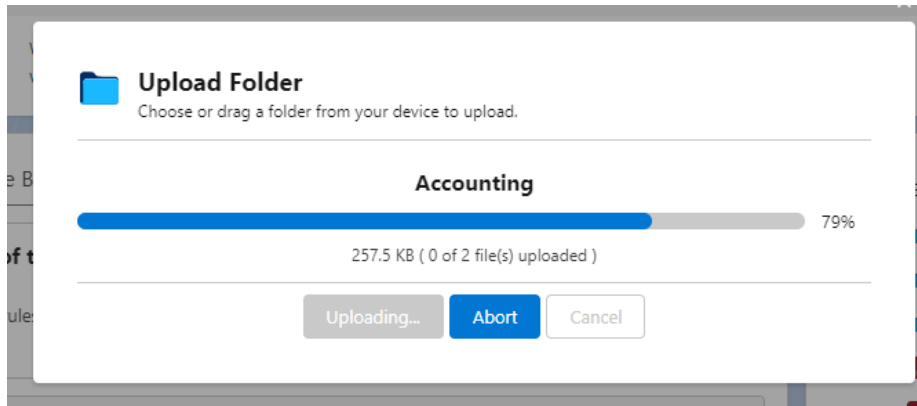
4. Click on **Upload Folder**



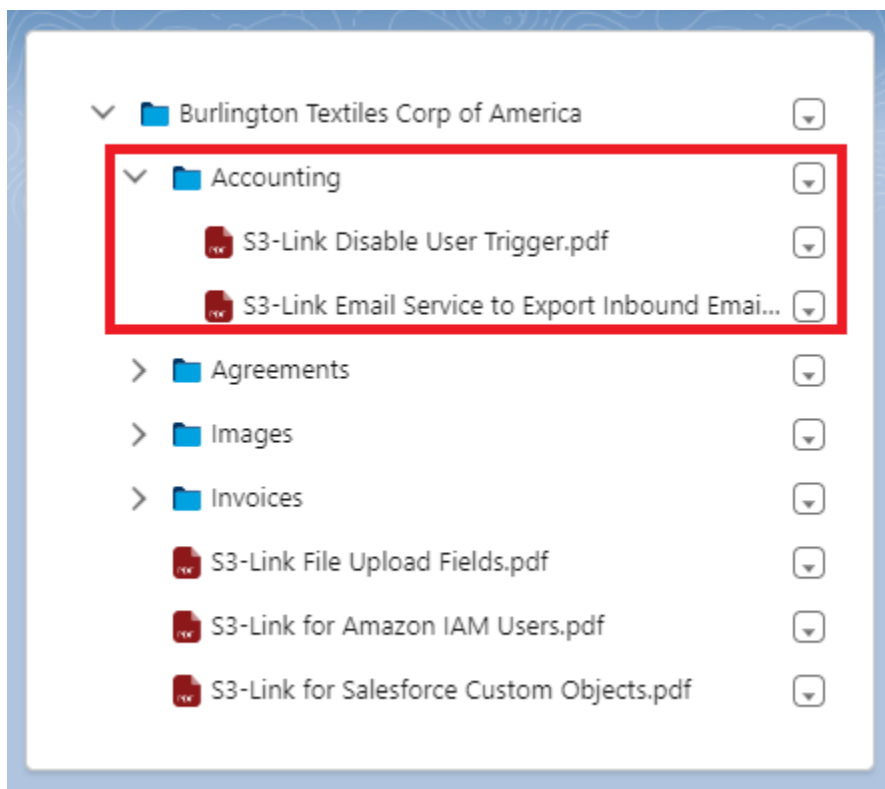
5. A pop-up will open. Click on **Choose folder** and select the folder from your local storage which you want to upload.
6. Click **Upload**



7. You can abort the process by clicking on **Abort**



8. After upload is successful, you will see that folder in File Explorer



Note: If you do not see the Upload Folder action for S3-Folders, please contact your System Admin and request to enable it by following steps in the **S3-Link File Explorer Setup**

Clone Folder

You can clone a folder along with its subfolders and files. Follow below steps to clone a folder.

1. Open Account record detail
2. Find the File Explorer
3. Click the menu for the S3-Folder which you want to clone
4. Click **Clone Folder**

5. This will open popup for Clone Folder
6. You can refer to the **S3-Link Clone Folder Guide** for more details about the Clone Folder functionality

Note: If you do not see the Clone Folder action for S3-Folders, please contact your System Admin and request to enable it by following steps in the **S3-Link File Explorer Setup**

Sync Files

You can sync the files with Salesforce which are uploaded directly in Amazon S3. Follow below steps to sync files inside a folder.

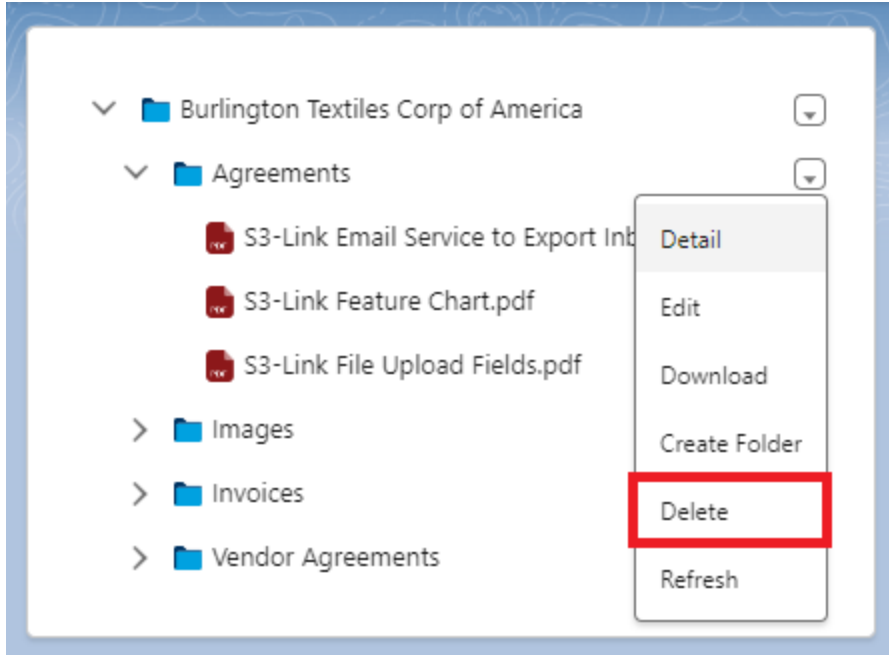
1. Open Account record detail
2. Find the File Explorer
3. Click the menu for the S3-Folder which you want to sync
4. Click **Sync Files**
5. It will open a popup for Sync Files
6. You can refer to the **S3-Link Sync Files Guide** for more details about the Sync Files functionality

Note: If you do not see the Sync Files action for S3-Folders, please contact your System Admin and request to enable it by following steps in the **S3-Link File Explorer Setup**

Delete Folder

You can delete the whole folder from File Explorer. This will delete the folder along with its subfolders and files. The files deleted via this will NOT go into S3-Link Recycle Bin if enabled. Follow below steps to delete a folder.

1. Open Account record detail
2. Find the File Explorer
3. Click the menu for the S3-Folder which you want to delete
4. Click **Delete**



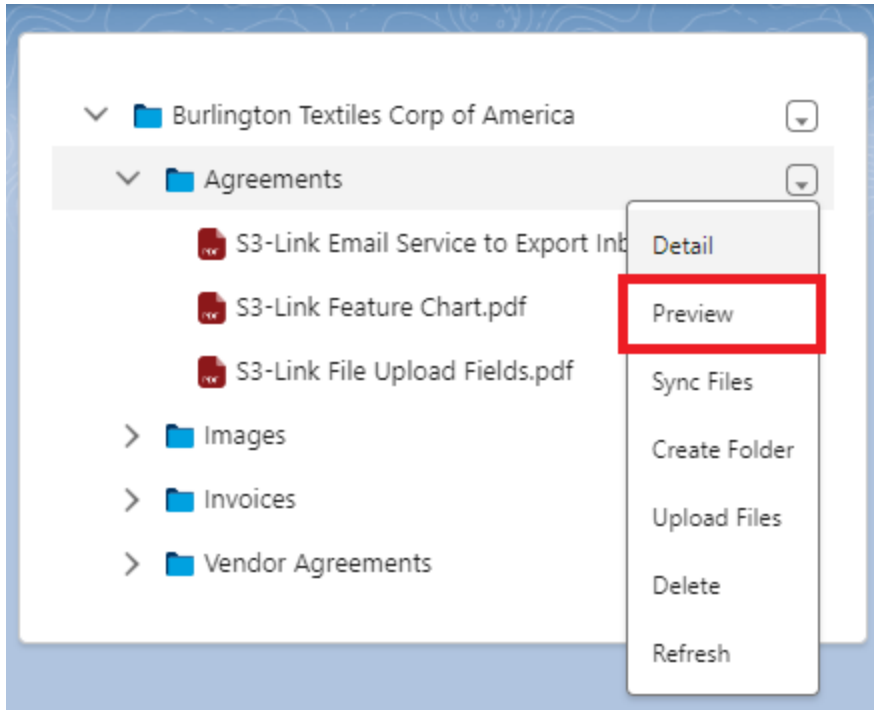
5. The folder along with it's subfolder and files will be deleted
6. You will not see that folder in File Explorer

Note: If you do not see the Download action for S3-Folders, please contact your System Admin and request to enable it by following steps in the **S3-Link File Explorer Setup**

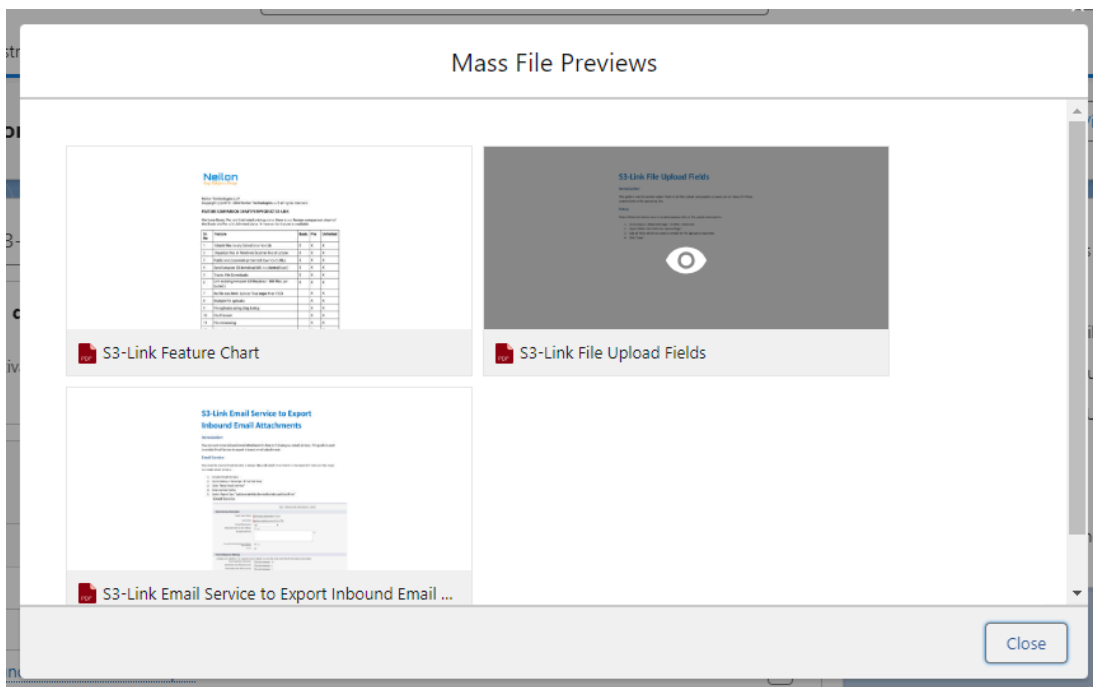
Preview Folder

You can preview all files inside a folder. Follow below steps for that.

1. Open Account record detail
2. Find the File Explorer
3. Click the menu for the S3-Folder whose files you want to preview
4. Click on Preview



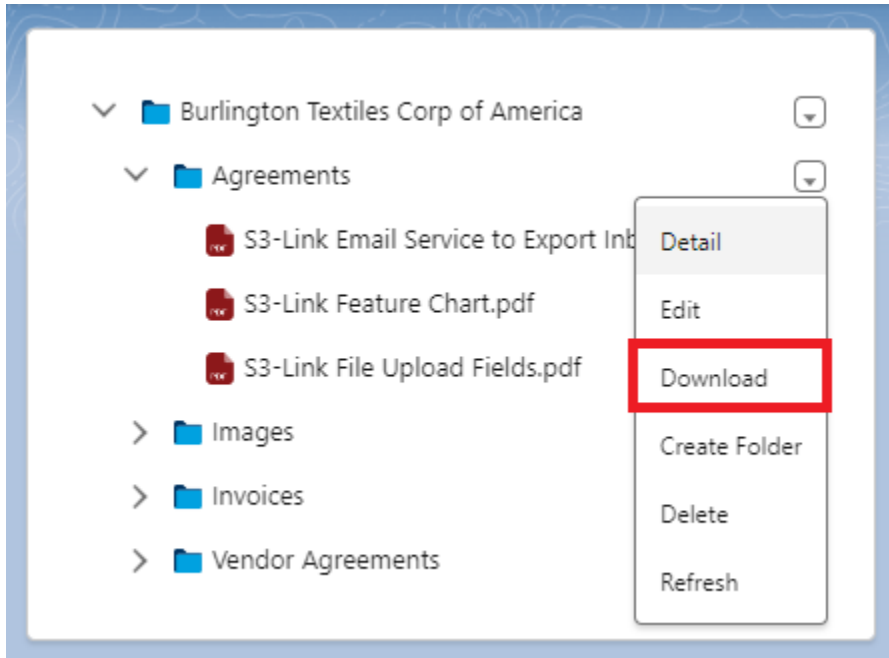
7. A pop-up will open with the preview files.



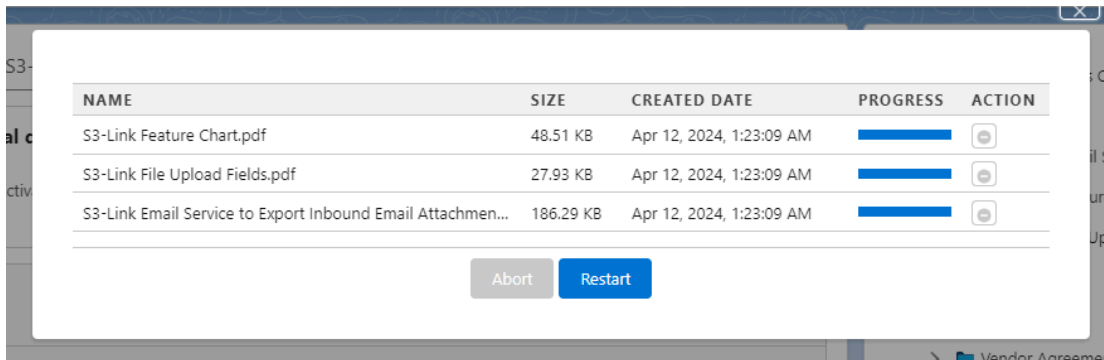
Note: If you do not see the Preview action for S3-Folders, please contact your System Admin and request to enable it by following steps in the **S3-Link File Explorer Setup**
Download Folder

You can download the whole folder as a zip file in local storage. Follow below steps for that.

1. Open Account record detail
2. Find the File Explorer
3. Click the menu for the S3-Folder whose files you want to download as a zip file
4. Click **Download**



5. A pop-up will open and the file will download to your local storage



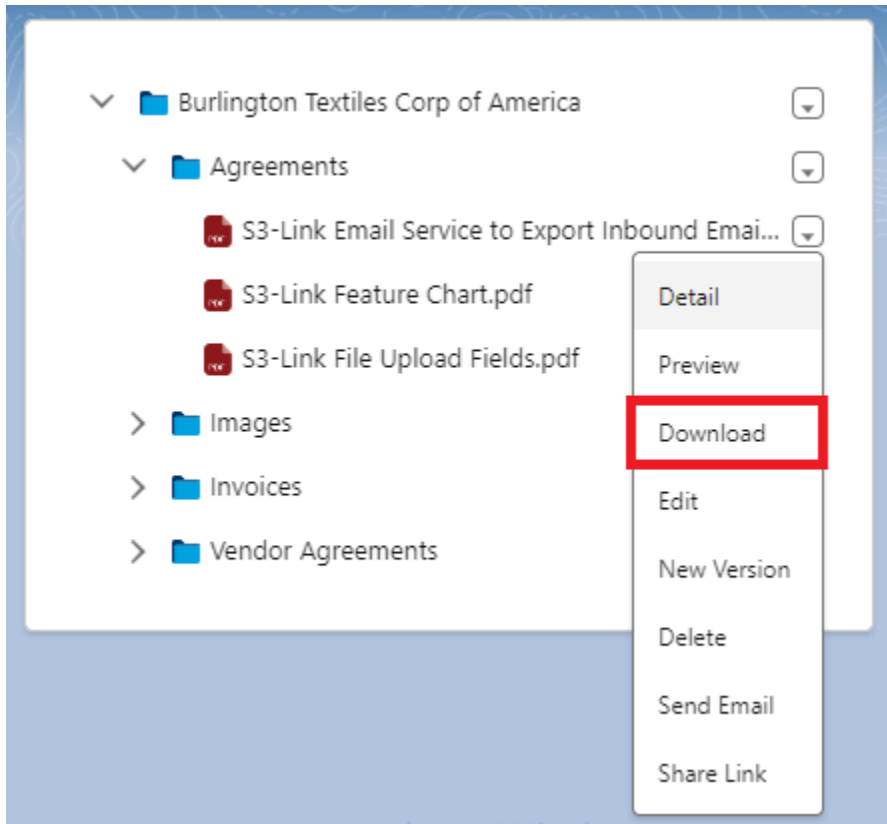
Note: If you do not see the Download action for S3-Folders, please contact your System Admin and request to enable it by following steps in the **S3-Link File Explorer Setup**

Download & Preview File

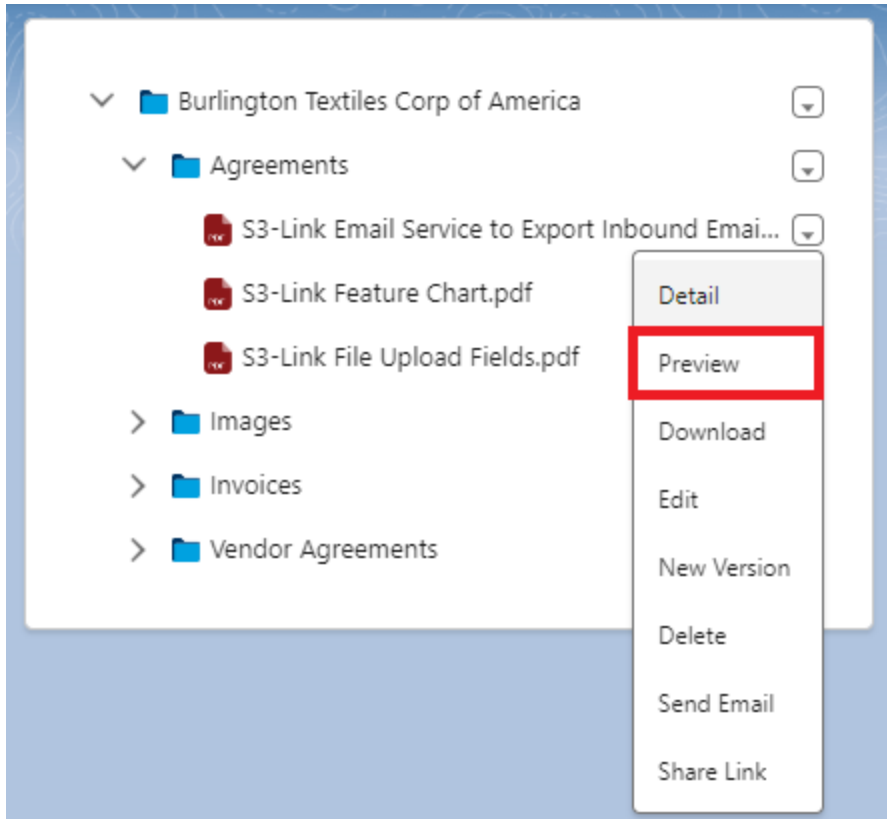
You can download and preview any file that is displayed in the File Explorer. Follow the below steps for that.

1. Open Account record detail
2. Find the S3-File Explorer
3. Click the menu for the S3-File that you want to download or preview

4. Click **Download** from the menu if you want to download the file



5. Click **Preview** from the menu if you want to preview the file

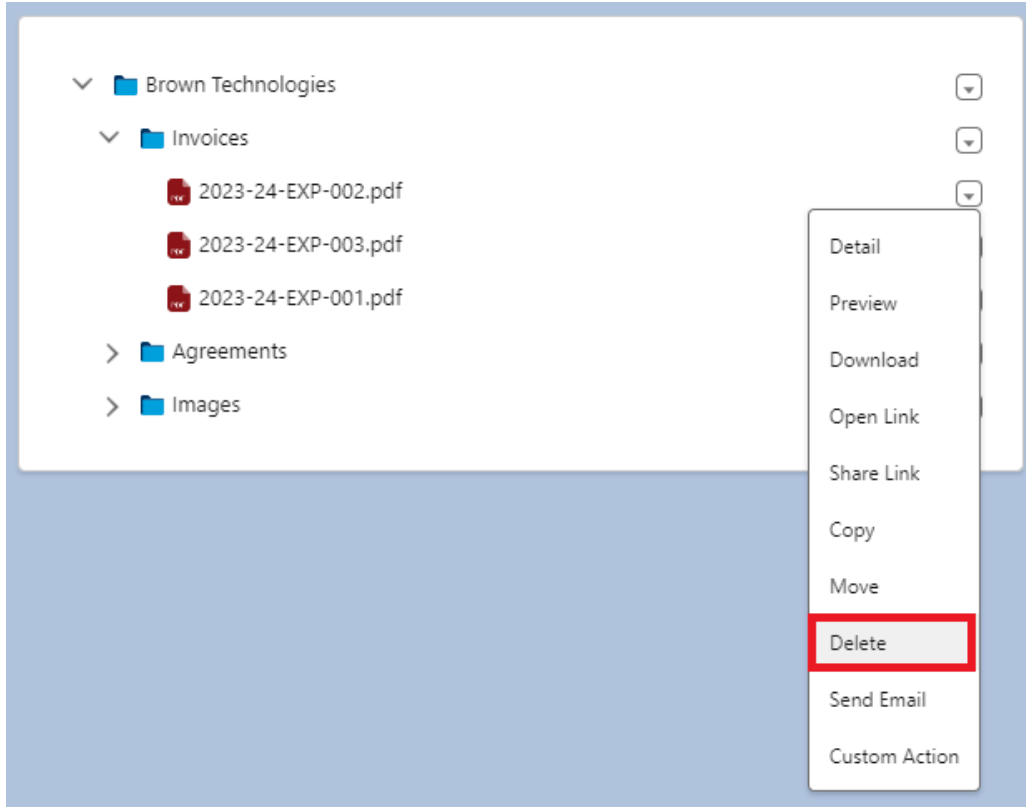


Note: If you do not see the Download & Preview actions for S3-Files, please contact your System Admin and request to enable them by following steps in the **S3-Link File Explorer Setup**

Delete S3-File

You can delete any file from the File Explorer. The files deleted via this will go into S3-Link Recycle Bin if enabled. Follow the below steps for that.

1. Open Account record detail
2. Find the S3-File Explorer
3. Click the menu for S3-File which you want to delete
4. Click **Delete** from the menu for the S3-File you want to delete

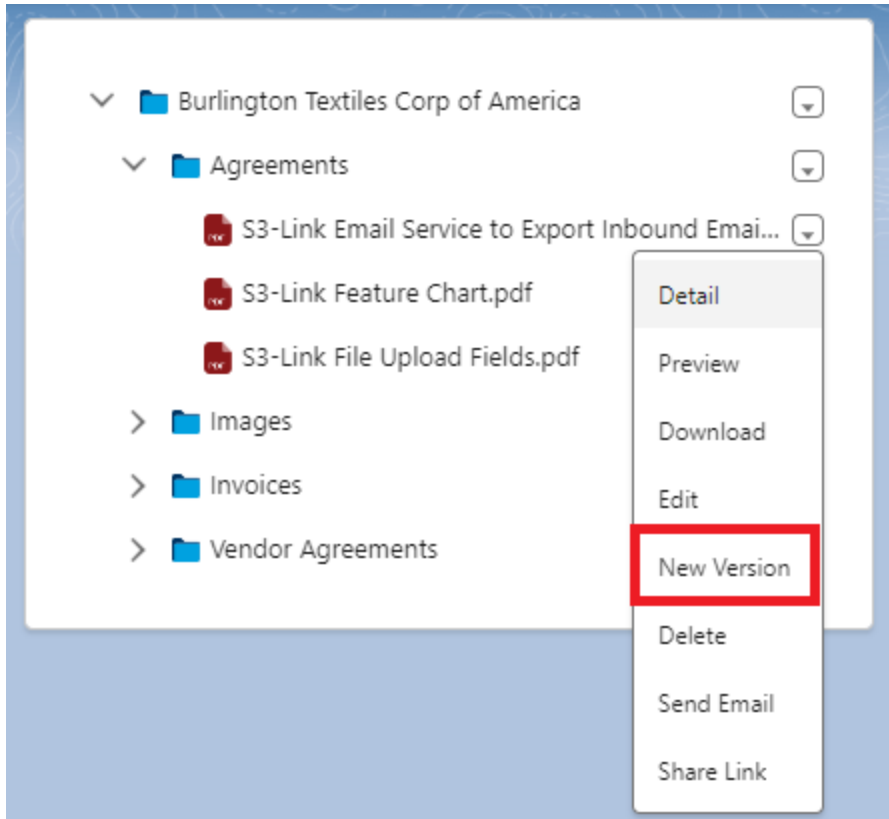


Note: If you do not see the Delete action for S3-Files, please contact your System Admin and request to enable this by following steps in the S3-Link File Explorer Setup

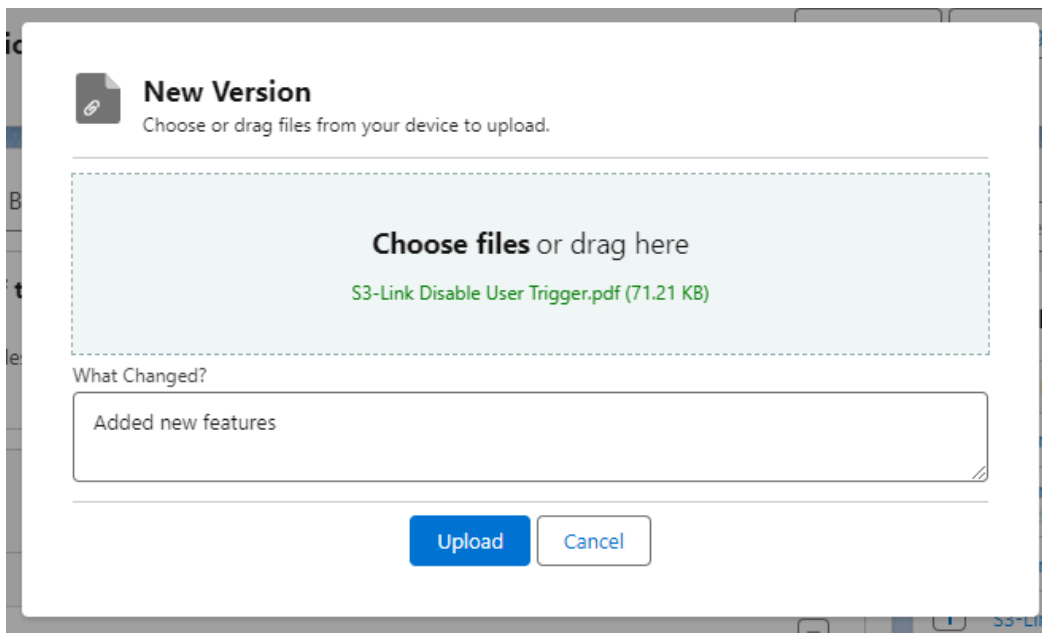
Upload New File Version

You can upload a new version of a file from the S3-File Search. Follow below steps for that.

1. Open Account record detail
2. Find the S3-File Explorer
3. Click **New Version** from menu for the S3-File for which you want upload new version



4. Click on **Choose files** and select the updated file which you want to upload as new version
5. Specify the changes made from the previous version in the **What Changes?**
6. Click **Upload** and this will upload the selected file as a new version



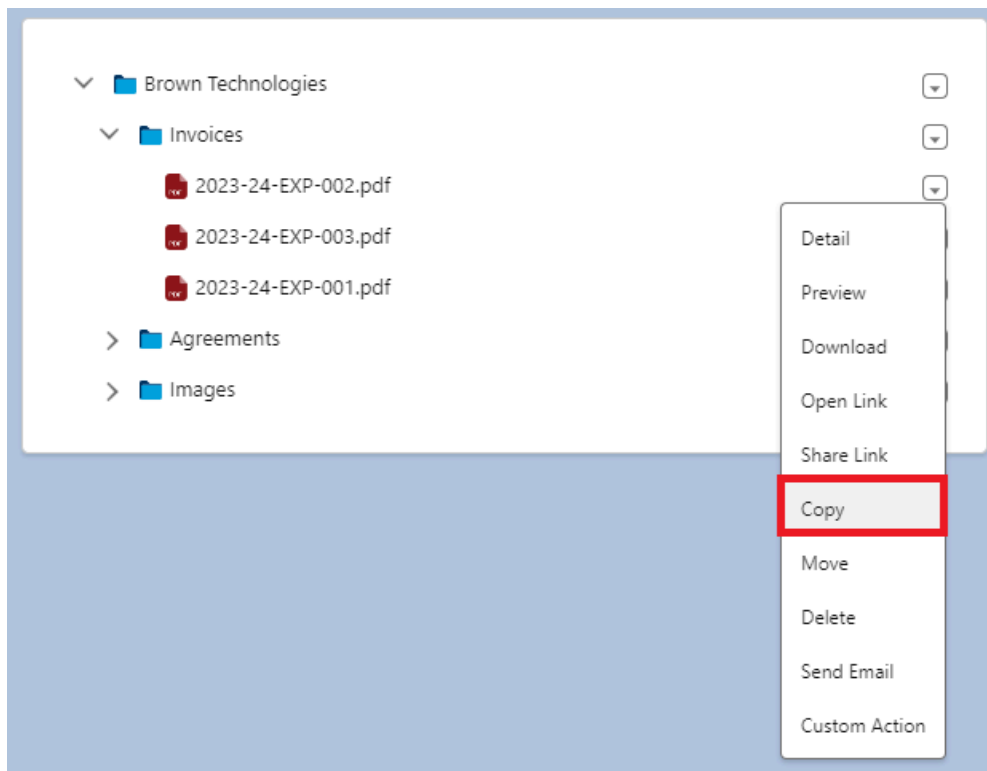
Notes:

- Follow the steps in the guide S3-Link Download & Preview File Version to download or view a specific file version of the S3-File record.
- If you do not see the New Version action for S3-Files, please contact your System Admin and request to enable this by following steps in the S3-Link File Explorer Setup

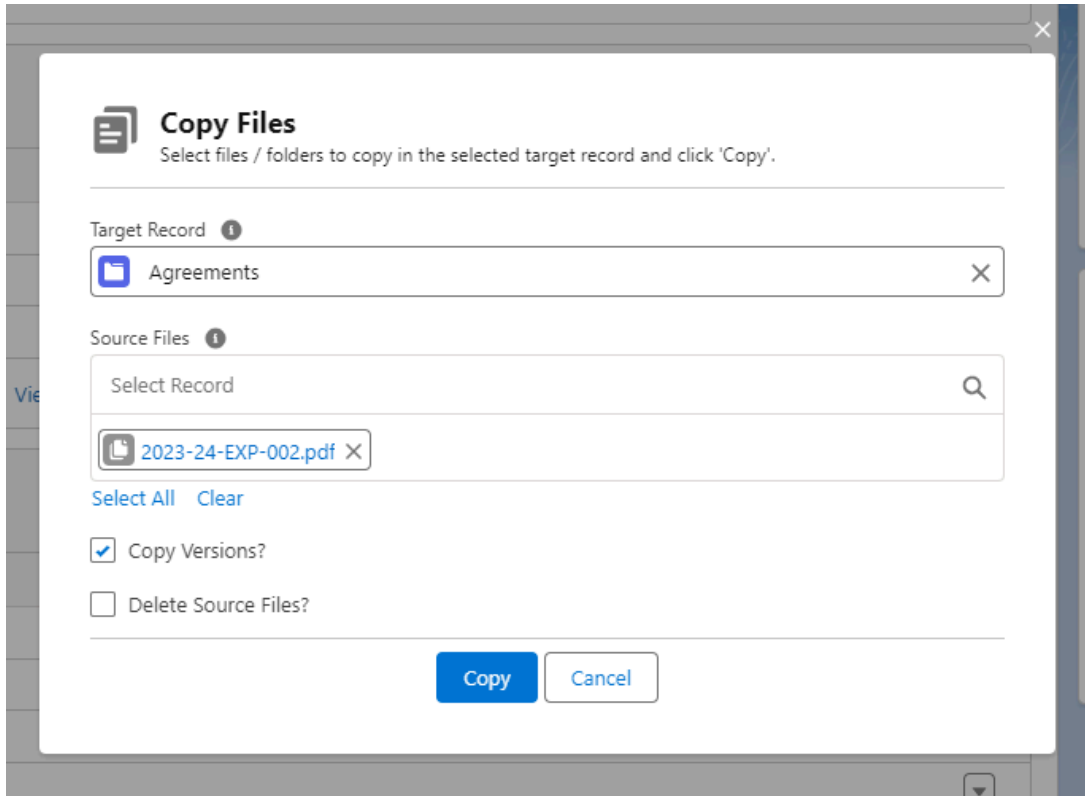
Copy File

You can copy a file from one folder to another folder of the Salesforce record. Follow the below steps to copy files.

1. Open Account record detail
2. Find the S3-File Explorer
3. Click **Copy** from the menu for the S3-File which you want to copy into another folder



4. A pop-up will open to copy the file
5. Select the folder in which you want to copy the file as **Target Record**



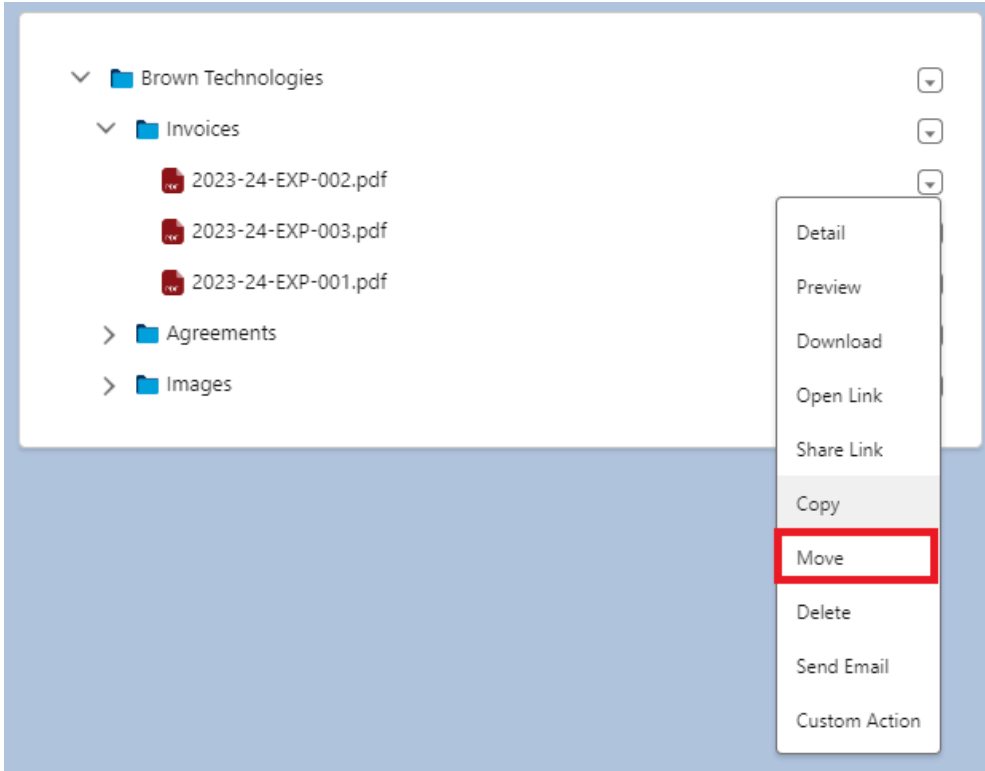
6. If you want to copy all file versions along with the file then set the **Copy Versions?** checkbox to true
7. If you want to delete source files after copy then set the **Delete Source Files?** checkbox to true
8. Click **Copy** and the file will be copied to the target folder

Note: If you do not see the Copy action for S3-Files, please contact your System Admin and request to enable this by following steps in the S3-Link File Explorer Setup

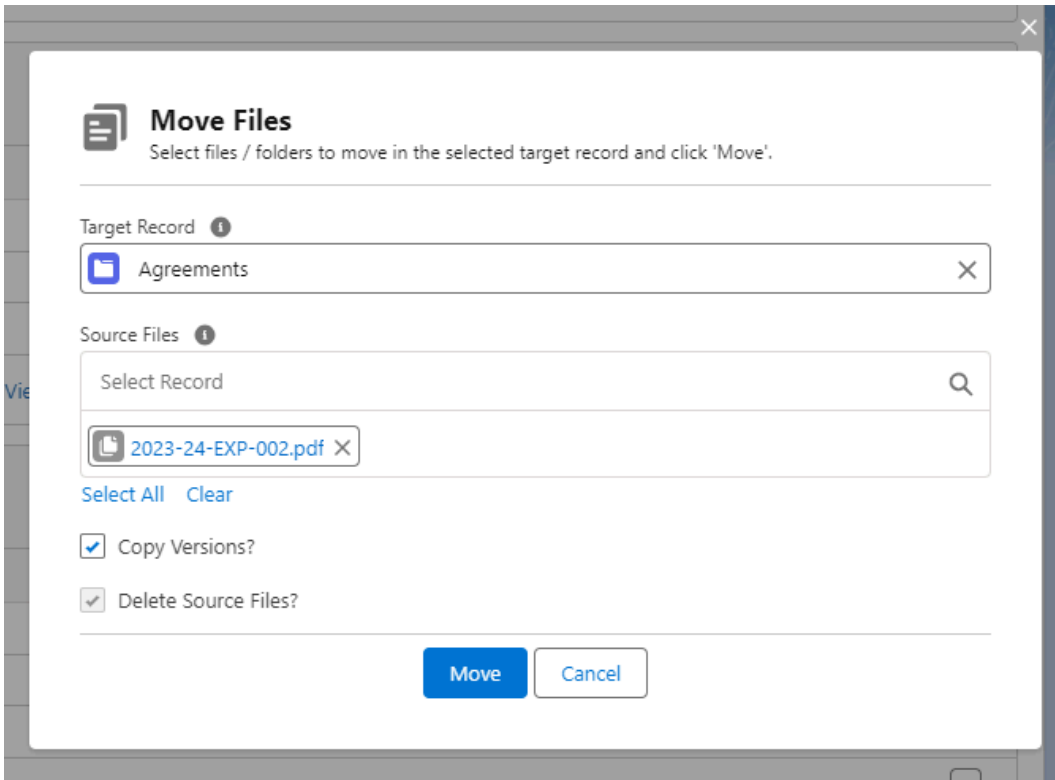
Move File

You can move a file from one folder to another folder of the Salesforce record. Follow the below steps to move files.

1. Open Account record detail
2. Find the S3-File Explorer
3. Click **Move** from the menu for the S3-File which you want to move into another folder



4. A pop-up will open to move the file
5. Select the folder in which you want to move the file as **Target Record**



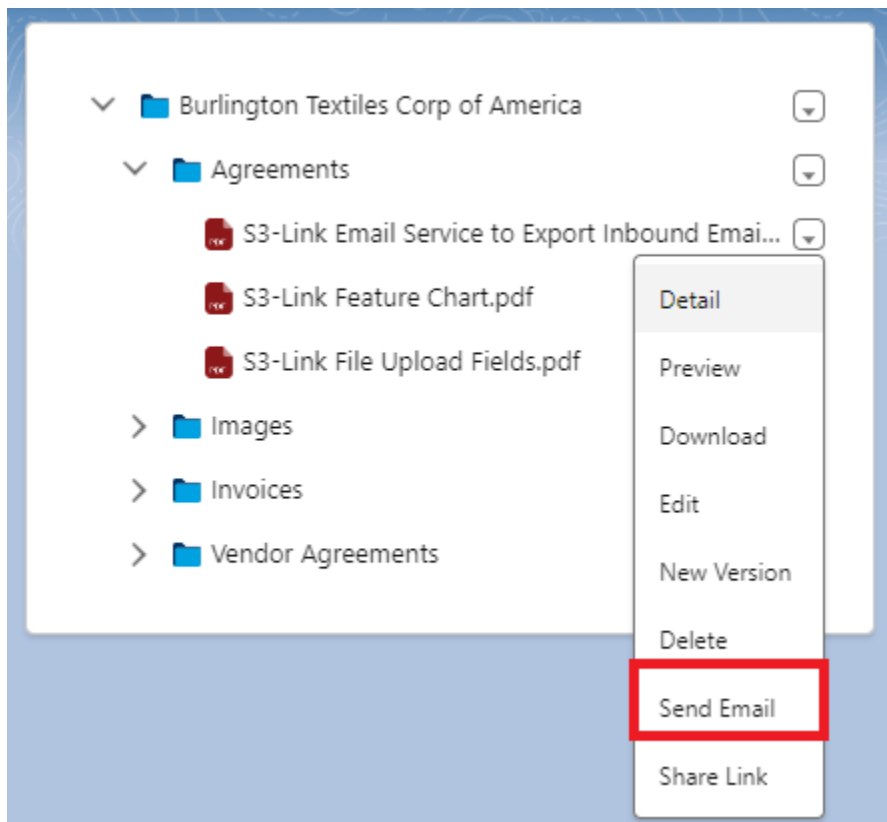
6. If you want to copy all file versions along with the file then set the **Copy Versions?** checkbox to true
7. Click **Move** and the file will be moved to the target folder

Note: If you do not see the Move action for S3-Files, please contact your System Admin and request to enable this by following steps in the S3-Link File Explorer Setup

Send File via Email

You can send S3-File to other external users via emails. Follow below steps for that.

1. Open Account record detail
2. Find the S3-File Explorer
3. Click **Send Email** from menu for the S3-File which you want to send via email



4. A pop-up will open to send an email

5. Add the necessary details to the send email
6. Click **Send**

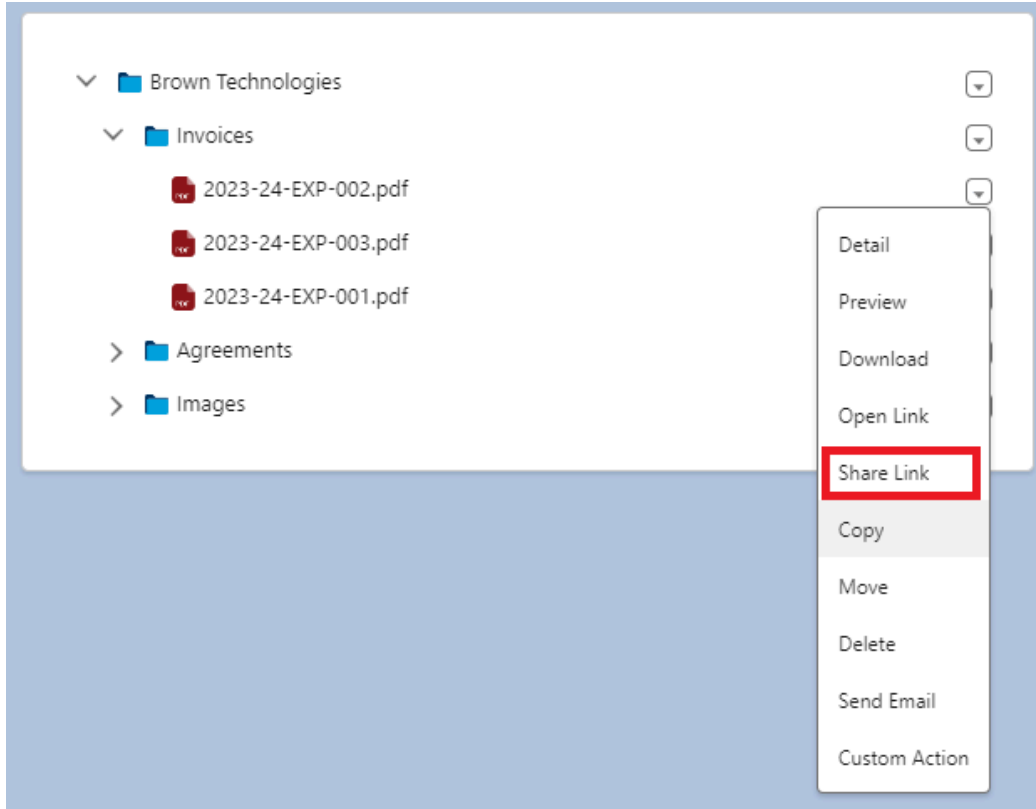
Note:

1. If you do not see the Send Email action for S3-File, please contact your System Admin and request to enable this by following steps in the **S3-Link File Explorer Setup**
2. If you want more details about our Email Files functionality, check **S3-Link Email Files User Guide**

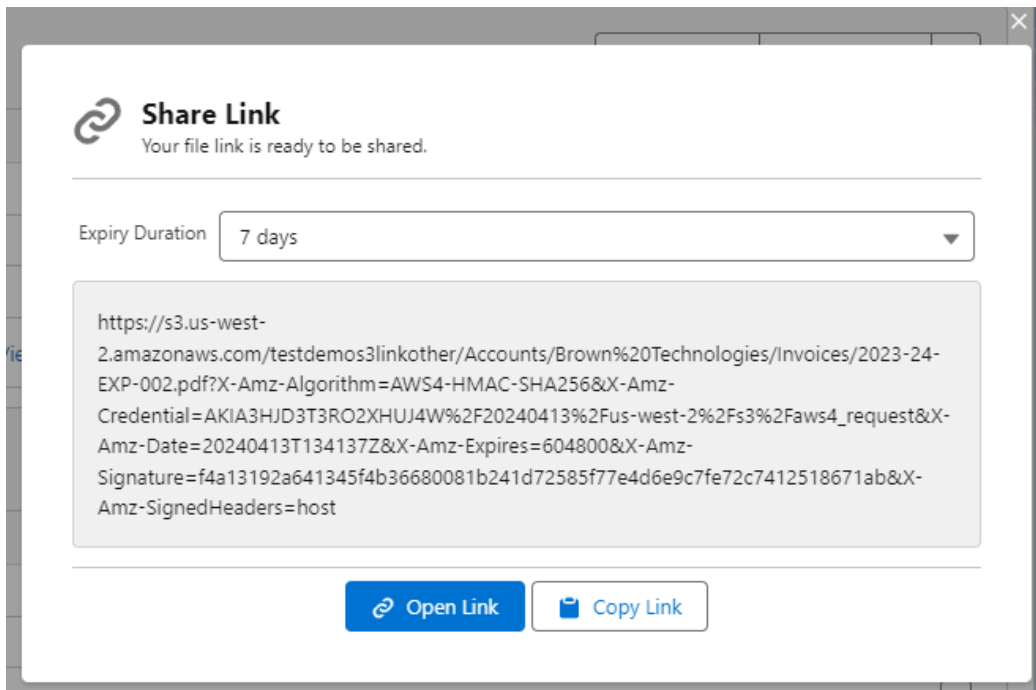
Share Link

You can copy and share the AWS link for any S3-File. Users will be able to view and download the file using that AWS link. Follow the below steps for that.

1. Open Account record detail
2. Find the S3-File Explorer
3. Click on the **Share Link** from menu for the S3-File which you want to share



4. A pop-up will open with AWS Link of the file



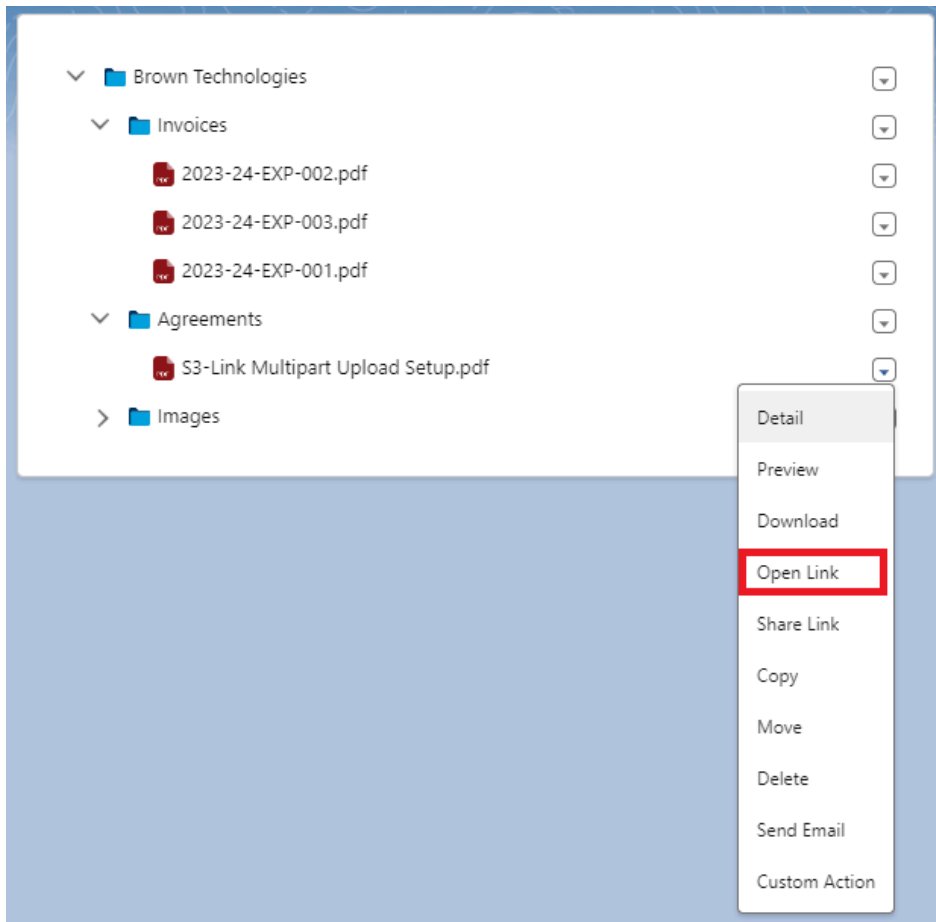
5. Select the expiry duration of the link
6. Click **Copy Link** if you want to copy the link
7. Click **Open Link** if you want to open the link in a new browser tab

Note: If you do not see the Share Link action for S3-Files, please contact your System Admin and request to enable this by following steps in the S3-Link File Explorer Setup

Open Link

You can open the file in the new browser tab using the AWS link. Follow the below steps to open the link.

1. Open Account record detail
2. Find the S3-File Explorer
3. Click on the **Open Link** from menu for the S3-File which you want to open



4. It will open the AWS link of the S3-File in new browser tab

s3.us-west-2.amazonaws.com/testdemos3linkother/Accounts/Brown%20Technologies/Agreements/S3-Link%20Multipart%20Upload%20Setup.pdf?X-A...

S3-Link Multipart Upload Setup

Introduction

This guide is used to enable multipart upload in our upload component.

Prerequisite

Before we start configuration for multipart upload, you will need your AWS bucket region and bucket name for which you want to enable multipart upload. Prepare a virtual hosted style URL for your AWS bucket using the below method.

If bucket region is other than us-east-1

Virtual Hosting(Enabled)	Virtual Hosting(Disabled)
https://(bucketname).s3.(region).amazonaws.com	https://s3.(region).amazonaws.com

If bucket region is us-east-1

Note: If you do not see the Open Link action for S3-Files, please contact your System Admin and request to enable this by following steps in the S3-Link File Explorer Setup.

