

S3 Link Report Export Guide

Our Salesforce Report Export feature, auto uploads Salesforce Reports in Amazon S3 every day at 12 AM. If you want to change the export frequency, you can always do that.

If you want to export reports in your specific Amazon S3 folder, you will need to create those folder hierarchy in Salesforce first. For that follow below steps. If you do not want to export reports in any specific Amazon S3 folder, you can skip these steps.

1. Go to S3-Link Administration > Import Files.
2. It will display all folders hierarchy with files for the bucket we linked.
3. Select files for salesforce reports
4. Click "Import files".
5. This will create folders and files in Salesforce.

If you do not want to use, import files option, follow below steps

1. Open "S3-Link" from App Launcher
2. Open "S3-File Explorer"
3. Create folder hierarchy using "Create Folder" button where you would like to upload reports

Follow below steps to configure the list of Salesforce reports which needs to be uploaded in Amazon S3.

1. Go to S3-Link Administration > Salesforce Report Export Configuration
2. Set the "Report Export Configuration" attributes as below
3. "Where to Export Reports?" is the Salesforce S3-Folder Id where reports will be uploaded. You can go to "S3-Link File Explorer" and open the details of the latest S3-Folder where you want to upload reports. Copy 15 or 18 digit record Id of the S3-Folder. Paste in "Where to Export Reports?" input text.
4. Click "Manage Reports" button
5. It will open "Salesforce Report Export Informations" page
6. Click "New" and provide the information of Salesforce Report which needs to be uploaded in AWS
7. "Label" can be anything. You can give a report name. "Salesforce Report Export Information Name" must be unique across all reports that need to be exported.
8. "Salesforce Report Name" will be the folder name where the report will be added. You can check folder names from "S3-Link File Explorer". Report's csv/excel file will also have the same name with extension at the end.
9. "Custom Report?" will be true, if the report is not a standard salesforce report.
10. "Salesforce Report URL" will be "URL to export report. To get it, open your report. From URL <https://ap1.salesforce.com/000900000093p7s>, "/000900000093p7s" will be your URL. If it's a standard report, from the URL <https://ap1.salesforce.com/000?rt=21>, "/000?rt=21" will be your URL.

11. Export File Format will be the type of report you want to export. CSV or excel.
12. "Save"

Add "Salesforce Report Export Informations" for all reports you want to export. Go to S3-Link Administration > Salesforce Report Export Configuration. You will find a list of all reports configured. All these reports will be exported everyday 12 AM. Everyday old reports will be replaced with the latest report file.