



FILE 365 USER INSTRUCTIONS

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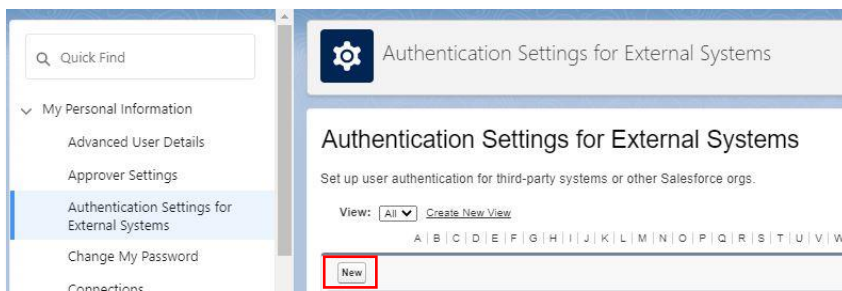


1. User instructions for File 365

1.1 Authenticate User with SharePoint

Note: This step is only necessary when using **Per User** authentication in the **Named Credential** settings. Ask your administrator if you should perform this step. If the **Named Principal Identity Type** is used in the **Named Credential**, you can skip this step.

Before first use, please connect your personal Salesforce user account with your SharePoint (Azure AD) account. Log in to Salesforce and go to User Settings. Click the User/Avatar Icon in the right top corner and click Settings. Then select "Authentication Settings for External Systems". Click New to open a new Authentication Settings screen.



New Authentication Settings for an External System

Set up user authentication for third-party systems or other Salesforce orgs.

Save Cancel

Authentication

External System Definition: Named Credential

Named Credential: File365 user NC

User:

Authentication Protocol: OAuth 2.0

Authentication Provider: Azure openId

Scope: openid offline_access https://lvoeiend.sharepoint.com/AllSites.FullControl

Authentication Status: Pending

Start Authentication Flow on Save:

Save Cancel

Enter the following:

<u>External System Definition</u>	Named Credential
<u>Named Credential</u>	Select the created Named Credential
<u>Authentication Protocol</u>	OAuth 2.0
<u>Start Authentication Flow on Save</u>	Check this field

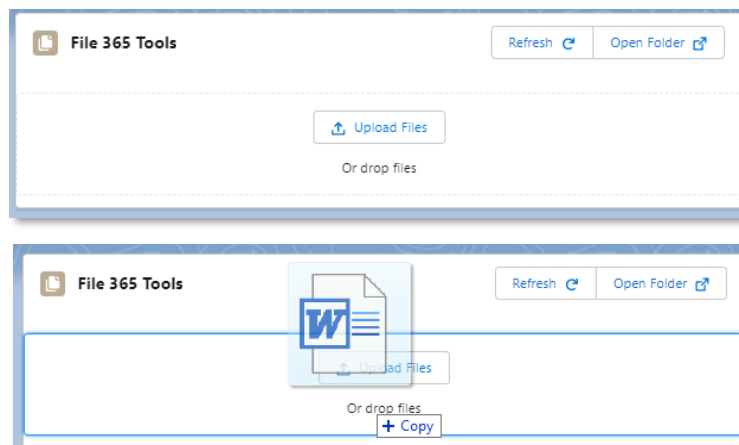
And click Save. You may be redirected to a Microsoft page where you must Authorize Salesforce to access SharePoint with your credentials. If needed, log in with your SharePoint (Azure AD) account and approve the authorization. When this is successful, you are ready to use File 365.



2. Upload files to Salesforce

2.1 Upload with the File 365 Toolbox

To add a file to a Salesforce record with File 365, you have two options. The first is to use the File 365 toolbox that should be added to the record page. Use the Upload Files button or easily add the files by dragging-and-dropping the files onto the drop zone of the Toolbox area.



Right after the upload to Salesforce is ready, the file will be transferred to SharePoint. When File 365 is configured for the Salesforce Object, the file will be uploaded to the SharePoint location configured by the File 365 Administrator. File 365 works with all Microsoft 365 file formats. *For uploads from Salesforce there is a file size limit of 10 MB, for uploads via SharePoint there is no file size limit, these files can then be accessed from Salesforce*

2.2 Upload to the File 365 Gallery Related List

If the record page has been configured with the new File 365 Gallery Related List component, the upload Files button that is a feature of the component can be used to upload files directly in Salesforce, or the Open Folder may be used to upload files from the SharePoint side (see next paragraph).

2.3 Upload files to SharePoint from Salesforce.

To relate a file to a Salesforce record, open SharePoint by clicking on **Open Folder** in the File 365 Toolbox or File 365 Gallery. This will open the subfolder in SharePoint that is related to the record. Add a new file with the +New button on top or drag and drop your files from Explorer. Wait for the files to be uploaded to the SharePoint folder. Return to the Salesforce record page and Refresh your screen. The File 365 Related List will be updated and show the added files.

2.4 Upload with Files or Notes & Attachments

Also it is still possible to use the standard Salesforce components Files and Notes & Attachments. The file won't be visible in the Notes & Attachments section, but a File 365 record will be created instead.



3. Access SharePoint files from Salesforce

After the files are uploaded to SharePoint, you can access them directly from Salesforce in different ways.

3.1 Open from the Files 365 Related List

Files can be opened directly from the Files 365 Related List on the record. The column under **Open** offers various options to open the file: **Edit in App or Web, View or Download**. Options to edit may not be available for certain file types, such as for audio or image files. The related list can be expanded by clicking on **View All** at the bottom.

File Name	File Extension	Open	Sub folder path
Demo File 2	docx	Edit in App or Web / View / Download	Instructions
PowerPointPresentation_sept22	ppt	Edit in App or Web / View / Download	
Audio file	mp3	View / Download	Media files
Match-Invoice-Process-Flow-Chart	vsd	Edit in App or Web / View / Download	
PowerPoint sample	ppt	Edit in App or Web / View / Download	
logo file365	png	View / Download	

[View All](#)

3.2 Open from the File 365 record

You can also click on the file name in the File 365 list, which will open the created File 365 record (the reference record of the document in SharePoint). In the top left menu, you can choose from the same options to open the file.

File 365
Demo File 2

Open: [Edit in App or Web / View / Download](#)

File Extension: docx | File Last Modified Date: 13-09-2022 12:54 | Status: Ready

File Name: Demo File 2 | Owner: Vloeieind IT Support

File Extension: docx | Status: Ready

Sub folder path: Instructions | Synchronize Content:

Open: [Edit in App or Web / View / Download](#)

Parent Record

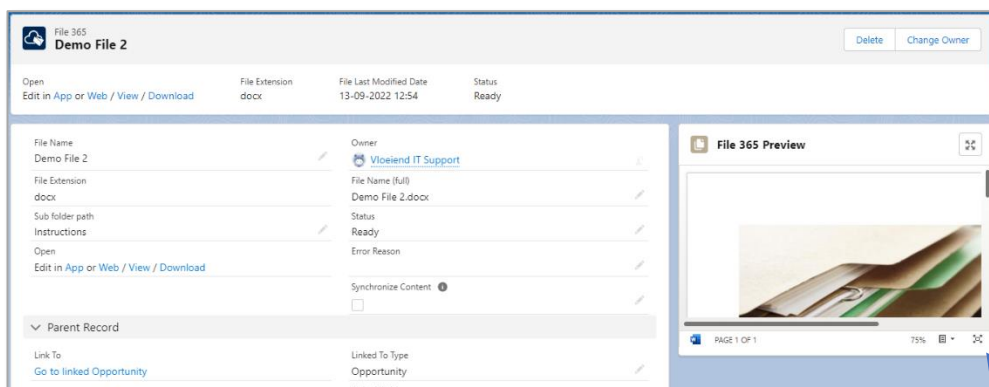
Link To: [Go to linked Opportunity](#)

Created By: Vloeieind IT Support, 07-09-2022 11:16 | File Last Modified Date: 13-09-2022 12:54



3.3 View/Open with the File 365 Preview on the File 365 record page

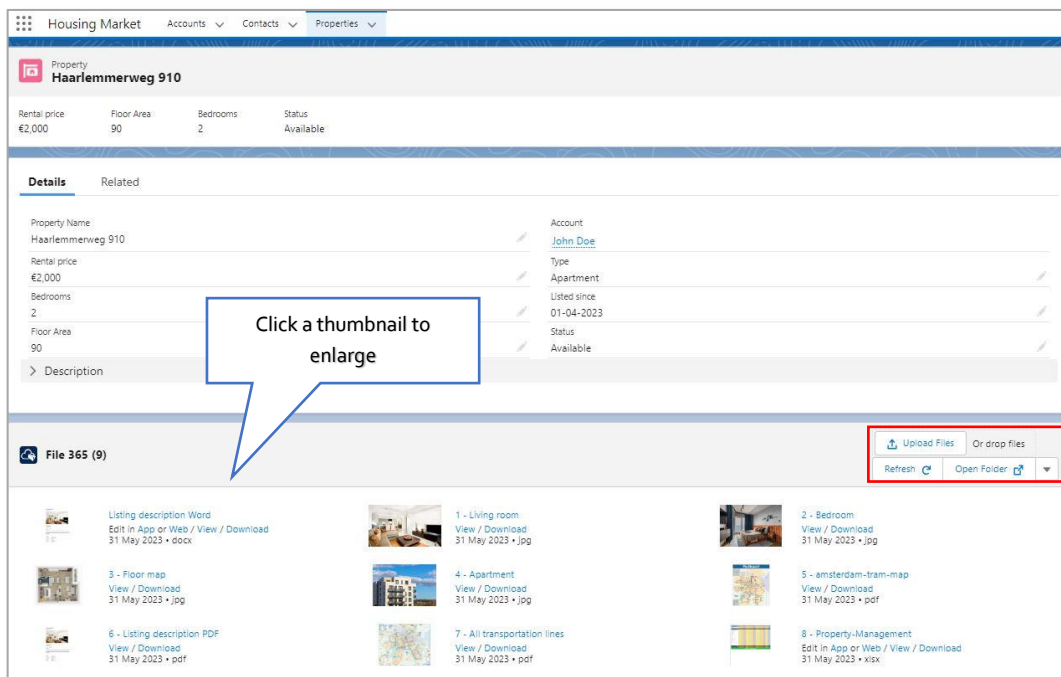
To identify the record immediately, you can use the preview pane on the related File 365 record. The preview Pane is included in the File 365 package, it does not need to be configured. To view the full contents of the document, click the button in the top right corner. The preview pane is not meant to edit the document. You need to close the preview pane in order to open the file from the File 365 record and edit it.



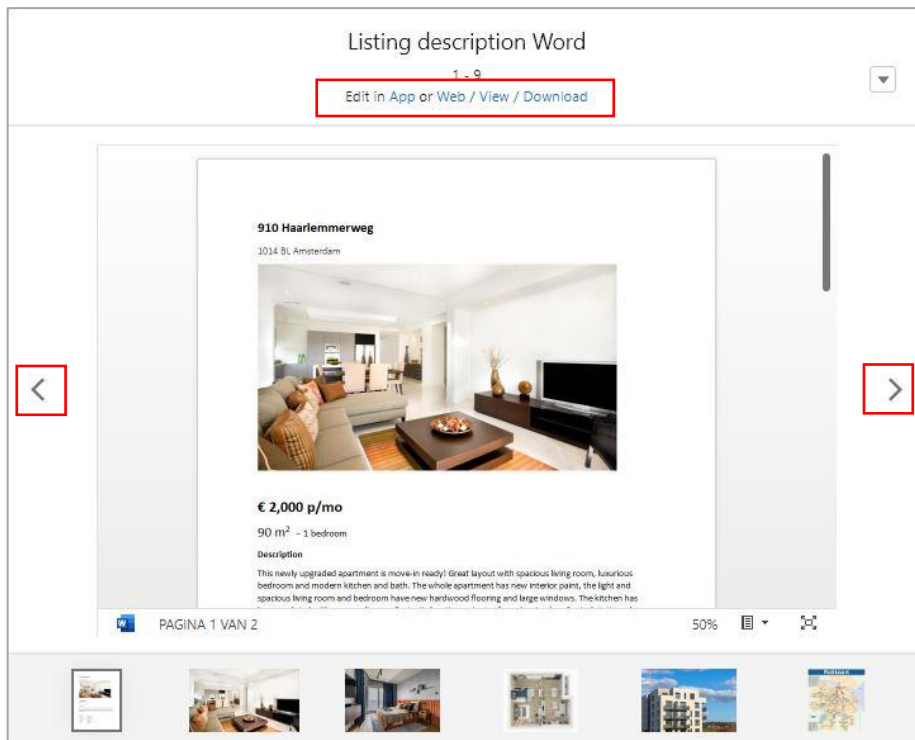
Click Expand to view the full content

3.4 Preview multiple files with the File 365 Gallery

To allow the user to preview multiple related files in one glance, File 365 now features a new type of related list, the File 365 Gallery. In order to use this, [configure the File 365 Gallery component on the Record Page](#) (see Set Up manual 5.2.3) Note that the Gallery Component features three buttons: **Upload Files**, **Refresh** and **Open Folder**. These buttons can be used to add files to the record if this has not been done. (see also 2.1)



Click on any thumbnail to enlarge. In the preview window you can choose from any of the four options on top (Edit in App or Web / View / Download) or scroll on to the next image with the side arrows, without opening each individual file.



3.5 Open the document from SharePoint folder

You can also access the document from the SharePoint Interface. Go back to the parent record. Click the 'Open Folder' button in the File 365 Toolbox or the File 365 Gallery on the right. This will open the active record folder in SharePoint in a new browser tab and show all the linked documents and created subfolders. Note that it will be faster to use the Open/download links on the File 365 record, as this will bring you directly to the related document and you can circumvent browsing through multiple layers of subfolders.



4. Editing documents

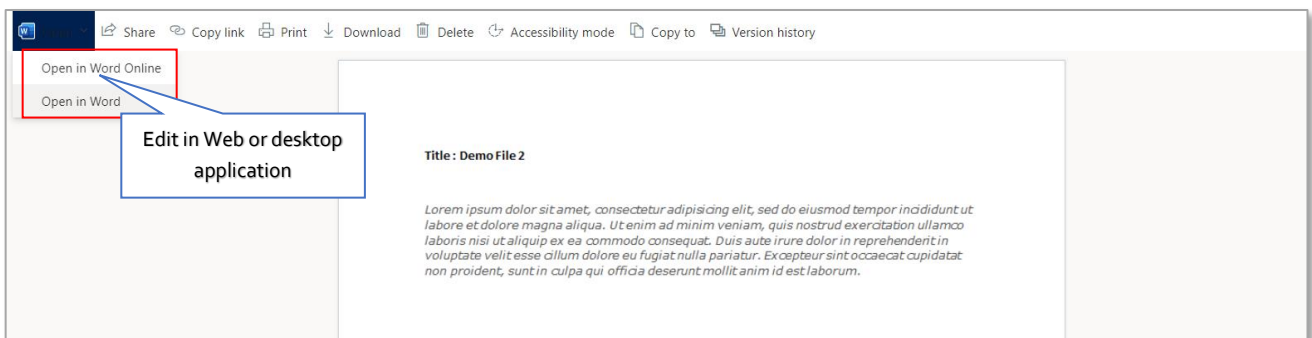
4.1 Edit in Web or desktop application from Salesforce

To open a file directly in Salesforce you can choose from the following options:

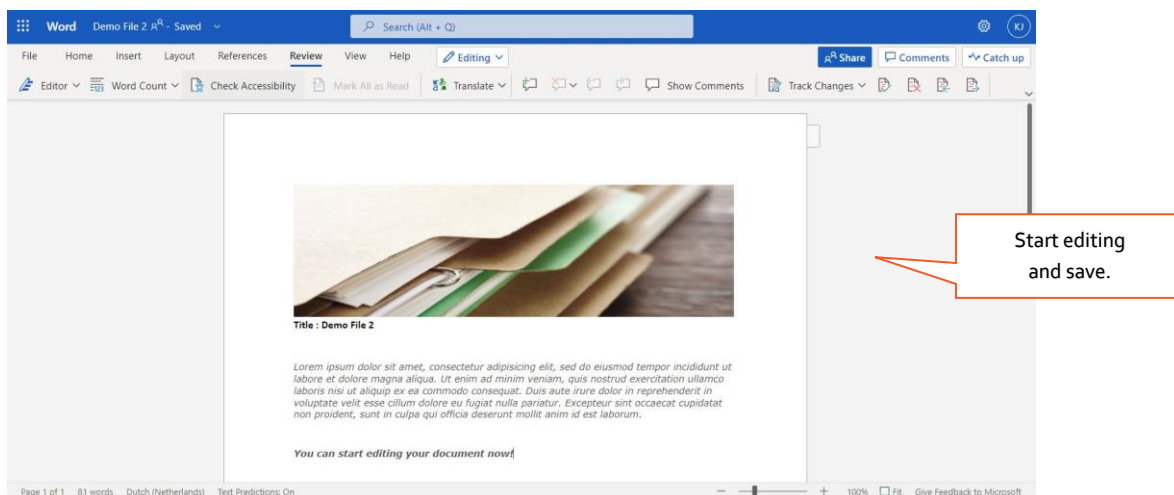
1. Edit in the Office Desktop app (**Edit in App**)
2. Edit in the Office Online App (**Edit in Web**)
3. **View** the document
4. **Download** the document.

These options are available on the File 365 Related list, the File 365 Record, as well as in the File 365 Gallery. Files can be *directly* edited in the desktop application (1 – Edit in App) or in the online app (2 – Edit in Web). Optionally, you can save your settings so that the next time you open the file, it opens directly in the preferred view.

Opening a file with the third option ‘View’, will open a file only in the online view. To edit the document requires an extra step: Click on the Word icon top left and then choose either application to edit the document.



Edit the document with text, images, or anything you like. All changes will be saved automatically or should be saved manually depending on your SharePoint settings. The changes will be saved directly in Salesforce.





If you go back to the linked record and refresh the page, the changes will be shown directly in the preview pane.

The screenshot displays the File 365 interface for a record titled "Demo File 2". The interface is divided into two main sections: a metadata table on the left and a preview pane on the right.

File Name	Demo File 2	Owner	Kyung de Jong
File Extension	docx	File Name (full)	Demo File 2.docx
Sub folder path	Subfolder1/Subfolder 2/Subfolder3	Synchronize Content	<input type="checkbox"/>
Status	Ready		
Open	Open / Download		
Opportunity	File 365 demo		
Lead			
Product-FILE365			
Project			
JOB			
Parent Record			
Link To	Go to linked Opportunity	Linked To Type	Opportunity
		Linked To Id	006090000Ecu01AAF
Created By	Kyung de Jong , 02-03-2022 14:36	File Last Modified Date	02-03-2022 16:42

The preview pane on the right, titled "File 365 Preview", shows a thumbnail image of a document with the title "Demo File 2".

4.2 Edit files from SharePoint

Editing a file can also be done from the SharePoint side. To go from Salesforce to SharePoint click the 'Open Folder' button in the File 365 Toolbox or the File 365 Gallery on the right. This will open the active record folder in SharePoint in a new browser tab. Find the document you wish to edit. Make the edits and save if necessary. This depends on your SharePoint settings for Autosave. Go back to your Salesforce record and open the document or check the preview. Refresh the page. The changes will be immediately available .

5. Rename or Delete a file in Salesforce

Uploaded files can be renamed or deleted within the context of Salesforce with the File 365 reference record. You can either start from the Files 365 Related List or open the related file 365 record first.

5.1 Rename or Delete a file from the File 365 list.

When starting from the File 365 related list, click on the arrow at the right behind the file you want to rename or delete.



Files 365 (6+)

File Name	File Extension	Open	Sub folder path
Audio file	mp3	View / Download	Media files
Demo File 2	docx	Edit in App or Web / View / Download	Instructions
File 365 manual	pdf	View / Download	Instructions
logo file365	png	View / Download	
Match-Invoice-Process-Flow-Chart	vsd	Edit in App or Web / View / Download	
PowerPoint sample	ppt	Edit in App or Web / View / Download	

[View All](#)

Click on the arrow

Edit
Delete

Edit File 365 manual

*File Name
File 365 manual 2022

File Extension: pdf
Sub folder path: Instructions
Open: [View / Download](#)

Parent Record

Link To: [Go to linked Opportunity](#)

Created By: Demo User, 14-09-2022 16:45
File Last Modified Date: 14-09-2022 16:52

[Cancel](#) [Save](#)

Give the file a new name and Save

To Rename, click **Edit**. This will open the File 365 reference record in Edit screen, edit or type the new name and click **Save**. After renaming the file in Salesforce, the actual file that is in SharePoint will be renamed as well. *Before opening the file after it has been renamed, the browser may need to be refreshed.*

To delete from the Related list, click the **Delete** option (after clicking the down arrow). The action must be confirmed before the file will be definitely removed from Salesforce and SharePoint.

Opportunities > Burlington Textiles Weaving Plant Generator

Files 365

9 Items • Sorted by File Name • Updated a minute ago

File Name ↑	File Extension	Open	Sub folder path	File Last Modified Date
1 Audio file	mp3	View / Download	Media files	08-09-2022 16:58
2 Demo File 2	docx	Edit in App or Web / View / Download	Instructions	14-09-2022 16:39
3 File 365 manual				
4 logo file365				
5 Match-Invoice-Process-Flow-Chart				
6 PowerPoint sample				08-09-2022 17:01
7 PowerPointPresentation_sept22				13-09-2022 12:57
8 SampleData				14-09-2022 16:59
9 sample1	doc	Edit in App or Web / View / Download	Instructions	14-09-2022 16:57

Delete File 365

Are you sure you want to delete this File 365?

[Cancel](#) [Delete](#)

Confirm that you want to delete



5.2 Rename or Delete a file through the File 365 reference record.

The second approach to renaming or deleting is to open the File 365 reference record in the Related list. Click on the File Name to open the File 365 record. After the record opens, click on the pencil to edit the file name.

File Name	File Extension	Open	Sub folder path
Audio file	mp3	View / Download	Media files
Demo File - version 3	docx	Edit in App or Web / View / Download	Instructions
File 365 manual 2022		View / Download	Instructions
logo file365		View / Download	
Match-Invoice-Process-Flow-Chart		Edit in App or Web / View / Download	
PowerPoint sample	ppt	Edit in App or Web / View / Download	

Click to open the File 365 record

File 365
Demo File - version 3

Open
[Edit in App or Web / View / Download](#)

File Extension: docx
File Last Modified Date: 20-09-2022 10:23
Status: Ready

File Name: Demo File - version 3
Owner: Vloeiend IT Support

File Extension: docx
Sub folder path: Instructions
Open: [Edit in App or Web / View / Download](#)

Parent Record

Link To: [Go to linked Opportunity](#)
Created By: Vloeiend IT Support, 07-09-2022 11:16
File Last Modified Date: 20-09-2022 10:23

Clicking the pencil icon will make the File name editable.

File 365
Demo File - version 3

Open
[Edit in App or Web / View / Download](#)

File Extension: docx
File Last Modified Date: 20-09-2022 10:23
Status: Ready

File Name: Demo File - september 2022
Owner: Vloeiend IT Support

File Extension: docx
Sub folder path: Instructions
Open: [Edit in App or Web / View / Download](#)

Parent Record

Link To: [Go to linked Opportunity](#)
Created By: Vloeiend IT Support, 07-09-2022 11:16
File Last Modified Date: 20-09-2022 10:23

Cancel Save

Edit the name and click Save

Deleting the file can simply be done with the delete button in the top menu of the File 365 record. The action must be confirmed before the file will be definitely removed from Salesforce and SharePoint.

File 365
Demo File - version 3

Delete Change Owner

Open
[Edit in App or Web / View / Download](#)

File Extension: docx
File Last Modified Date: 20-09-2022 10:35
Status: Ready

File Name: Demo File - version 3
Owner: Vloeiend IT Support

File Extension: docx
File Name (full): Demo File - version 3.docx

File 365 Preview

Click Delete



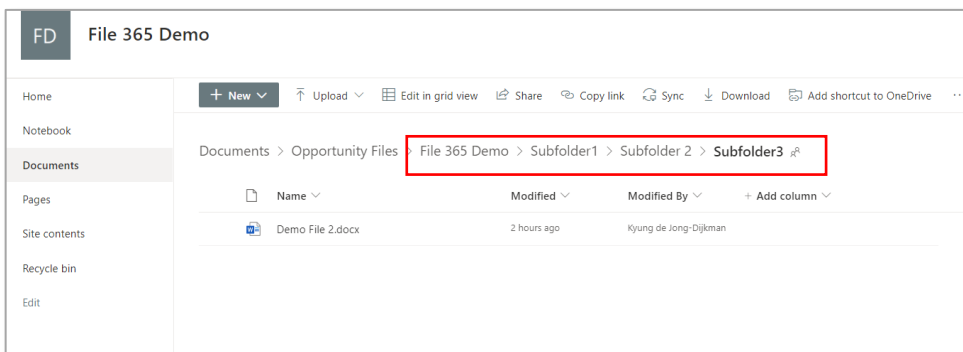
6. Organize your files with subfolders in SharePoint

6.1 1. Organize your files with subfolders in SharePoint

If you upload files in Salesforce, by default there is no option to create subfolders. All the files linked to a record exist at the same level. File 365 integrates Salesforce and SharePoint, offering you the possibility to create multiple levels of subfolders in SharePoint but still access a document directly from Salesforce with just one click.

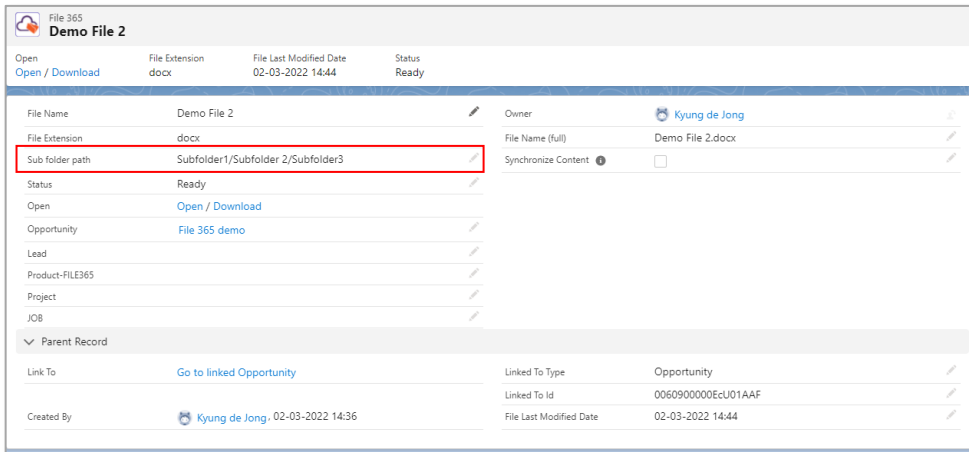
For example, you have linked a document named “Demo File 2” to an opportunity with the Opportunity Name “File 365 Demo” (record level) and have created three levels of subfolders. In SharePoint, you save the document in the third subfolder. The path will be Documents > Opportunity Files *> File 365 demo > Subfolder 1 > Subfolder 2> Subfolder 3. The SharePoint path will be displayed in the column/field **Subfolder path**.

SharePoint Interface:



Salesforce Interface:

	File Name ↑	File Extens...	Sub folder path	Synchroniz...	Open	File Last Modified ...	Created By
1	Demo File 2	docx	Subfolder1/Subfolder 2/Subfolder3	<input type="checkbox"/>	Open / Download	02-03-2022 14:44	Kyung de Jong
2	Document	docx	Subfolder1/Subfolder 2	<input type="checkbox"/>	Open / Download	02-03-2022 14:44	Kyung de Jong
3	Document	docx	Subfolder1	<input type="checkbox"/>	Open / Download	02-03-2022 14:44	Kyung de Jong
4	Document Demo File 365	docx	Subfolder1/Subfolder 2	<input type="checkbox"/>	Open / Download	02-03-2022 14:44	Kyung de Jong
5	File 365 - User and Administr...	pdf	Instructions	<input type="checkbox"/>	Open / Download	02-03-2022 14:33	Kyung de Jong
6	Planning	xlsx		<input type="checkbox"/>	Open / Download	02-03-2022 14:33	Kyung de Jong



You can see that File 365 allows you to save and organize files related to Salesforce records in SharePoint, and at the same time you can still access those files from Salesforce with a single click!

7. Synchronize content

7.1 Synchronize all PDF content for a single object

It is possible to synchronize PDF content saved with File 365 in SharePoint back to Salesforce. This can be configured for all PDF documents linked to a particular object. This should be done by the File 365 Administrator, in the [File 365 Object Location settings](#) (see Set Up Manual, paragraph 4.4). It can be configured when creating the SObject Location, or at any later moment. Go to the SObject Location, click Edit and then tick the checkbox 'Synchronize Content for PDFs' at the bottom.

* Content type for Record folder
Folder

* Content type for uploaded files
Document

Document Library Base Folder
/Lead Documents/ Choose folder

Options
 Synchronize Content for PDFs

Cancel Save

If you upload any PDF content to a Salesforce record of an object that is configured for Files 365 and Synchronize content, these PDF files will be present both in SharePoint **and** in Salesforce. On the created File 365 record the field 'Synchronize Content' will be selected. It does not matter if the PDF file is located in the main record folder or in a subfolder. All PDF content will be detected and placed in the standard Salesforce Files.



File 365
File 365 - Set Up Manual

Open: [View / Download](#) | File Extension: pdf | File Last Modified Date: 27-07-2023 15:10 | Status: Ready

File Name	File 365 - Set Up Manual	Owner	Vloeiend IT Support
File Extension	pdf	File Name (full)	File 365 - Set Up Manual.pdf
Sub folder path		Status	Ready
Open	View / Download	Error Reason	
		Synchronize Content	<input checked="" type="checkbox"/>

Lead: **Mr. John Doe** | [+ Follow](#) | [Convert](#) | [Edit](#) | [Delete](#)

Title: | Company: File 365 | Phone (2): | Email: j.doe@file365.nl

Details | Related | **Files 365**

Files 365 (6) | Refresh | Open Folder

6 items • Sorted by File Extension • Updated 5 minutes ago

	File Name	File Extension	Open	Synchronize
1	How to get the most out of Salesforce	docx	Edit in App or Web / View / Download	<input type="checkbox"/>
2	File 365 - Set Up Manual	pdf	View / Download	<input checked="" type="checkbox"/>
3	How to get the most out of Salesforce	pdf	View / Download	<input checked="" type="checkbox"/>
4	logo file365	png	View / Download	<input type="checkbox"/>
5	File 365 Integrate Salesforce and Shar...	pptx	Edit in App or Web / View / Download	<input type="checkbox"/>
6	Purchase-order	xlsx	Edit in App or Web / View / Download	<input type="checkbox"/>

Files (2)

- How to get the most out of Salesforce
27 Jul 2023 • 155KB • pdf
- File 365 - Set Up Manual
27 Jul 2023 • 3MB • pdf

[View All](#)

Add the Files component to use synchronized content in Salesforce

To use synchronized PDF content in Salesforce, add the Lightning components Files to the record page layout.

With this functionality only the *synchronized PDF content* will be shown the Files component, other type of content exist only in SharePoint

7.2 Synchronize an individual file linked to a record.

A File 365 user can also choose for an individual file if it should or should not be synchronized. This can be any file type. For this you need to open the reference file of this File, the File 365 record, and tick the checkbox Synchronize Content.



File 365
How to get the most out of Salesforce

Open: Edit in App or Web / View / Download | File Extension: docx | File Last Modified Date: 27-07-2023 15:51 | Status: Ready

* = Required Information

* File Name: How to get the most out of Salesforce | Owner: Vloeiend IT Support

File Extension: docx (This field is calculated upon save) | File Name (full): How to get the most out of Salesforce

Sub folder path: [Empty field]

Status: Ready

Open: Edit in App or Web / View / Download (This field is calculated upon save) | Error Reason: [Empty field]

Synchronize Content: (Info icon)

Parent Record: [Dropdown]

Cancel Save

Check this box to synchronize the content for this PDF file only.

After clicking Save, the synchronized file will appear in the Salesforce Files component.

Lead: Mr. John Doe | + Follow | Convert | Edit | Delete

Title: File 365 | Company: File 365 | Phone (2) | Email: j.doe@file365.nl

Details | Related | **Files 365**

Files 365 (6) | 6 items • Sorted by File Extension • Updated a few seconds ago

File Name	File Extension	Open	Synchronize
How to get the most out of Salesforce	docx	Edit in App or Web / View / Download	<input checked="" type="checkbox"/>
File 365 - Set Up Manual	pdf	View / Download	<input checked="" type="checkbox"/>
How to get the most out of Salesforce	pdf	View / Download	<input checked="" type="checkbox"/>
logo file365	png	View / Download	<input type="checkbox"/>
File 365 Integrate Salesforce and Shar...	pptx	Edit in App or Web / View / Download	<input type="checkbox"/>
Purchase-order	xlsx	Edit in App or Web / View / Download	<input type="checkbox"/>

File 365 Tools | Refresh | Open Folder

Upload Files | Or drop files

Files (3)

- How to get the most out of Salesforce (27 Jul 2023 • 24KB • docx)
- How to get the most out of Salesforce (27 Jul 2023 • 155KB • pdf)
- File 365 - Set Up Manual (27 Jul 2023 • 3MB • pdf)

Note : to choose if PDF content should be synchronized for individual files, is only possible if for this particular object, the File 365 settings is **not** set to synchronize all PDF content. If the checkbox **is** checked, it will not be possible for users to manage Synchronize content at the record or individual file level.

Synchronize Content **Synchronize Content is set by the administrator for this file.**



7.3 Sending emails with synchronized files

A synchronized file can be easily added as an attachment when emailing from the related Salesforce record page. When selecting an attachment in the Salesforce email composer, you can find the files under “Related Files”.

