



# TIPS FOR USING CONTENT DELIVERIES

## Summary

A content delivery allows you to easily convert Microsoft® PowerPoint, Word, Excel, and Adobe® PDF documents into an optimized Web page for online viewing. Once you create your delivery, you can send its URL to colleagues, partners, leads, or any other recipient and then track how often the content is viewed or downloaded. You control how long the delivery is available to viewers and whether a viewer can download a file or see it online only.

## Enabling Content Deliveries

To enable content deliveries for your organization:

1. From Setup, enter *Content Deliveries* in the Quick Find box, then select **Content Deliveries**.
2. Click **Enable Creation of Content Deliveries for Salesforce Files**. If you don't have access to the Content Deliveries feature, contact Salesforce Customer Support to activate it.
3. Choose a default option for content-delivery passwords. Because content-delivery URLs can be sent to leads, customers, or any unauthenticated user, Salesforce recommends requiring password protection if your users will send confidential documents via content delivery. The options below allow you to select an organization-wide default for content-delivery password protection.
  - **Password protection is optional and defaults to OFF**—If this option is selected, users can choose to require a password when they create a content delivery, but the *Require Password to Access Content* field on the create-delivery wizard is not checked by default.
  - **Password protection is optional and defaults to ON**—If this option is selected, the *Require Password to Access Content* field on the create delivery wizard is checked by default. Users can uncheck the option if they do not want to require a password.
  - **Password protection is required**—If this option is selected, a password is generated each time a content delivery is created. Users cannot opt out of the password requirement.

### Note:

- If you choose to require a password, users who create a content delivery will receive a password when the delivery is generated; users must send the password and the delivery URL to delivery recipients. Delivery recipients are prompted for the password when they click the content delivery URL.
- Content delivery passwords display with the content-delivery URL when the delivery is created. You can also access the password on the delivery detail page for the life of the content delivery.

When content delivery is enabled, all users can add the Content Deliveries related list to their page layouts for leads, accounts, contacts, opportunities, cases, campaigns, or custom objects. All Salesforce CRM Content users will see a **Deliver Content** option on each content details page.

## Implementation Tips

### Password Protection

Because content-delivery URLs can be sent to leads, customers, or any unauthenticated user, Salesforce recommends requiring password protection if your users will send confidential documents via content delivery.

Carefully consider the following implementation tips before creating and sending content deliveries:

- To ensure quality of service, the total number of content-delivery views allowed within a 24-hour period is limited to 20,000. Also, the amount of bandwidth allocated to content deliveries is limited to 10 GB within a 24-hour period. If a recipient tries to view a delivery when a rate limit has been exceeded, a notification displays that asks the viewer to try again later. Salesforce may be able to increase rate limits on an exception basis. For more information, contact your sales representative.
- When you create a content delivery, Salesforce copies the original file and creates a new version of that file specifically for online viewing. Note the following information concerning supported file types:
  - Microsoft® Office 97 through Microsoft Office 2007 Word, Excel, and PowerPoint files are supported for online views.
  - Adobe® PDF files are supported for online views, but copy-protected PDFs are not.
  - JPG, BMP, GIF, and PNG are supported for online views.
  - Any document over 25 MB is not supported for online views.

You can create a content delivery with any file type, but if the file type is not supported for online viewing, your recipient can only download the document in its original file format.

- Always preview your content delivery before sending the URL to recipients. In some cases, formatting in the original file, such as colors and non-standard fonts, may not display properly in the online version. If you are not happy with the quality of the online version, the content delivery wizard gives you the option of making your content available for download in its original file format.
- Content deliveries require Adobe Flash version 9.0.115. If a recipient does not have Flash installed, a download option displays.
- Customer Portal and partner portal users cannot create content deliveries.
- Only the creator of a content delivery can delete the delivery record or edit details such as the expiration date.
- Each time a content delivery's URL is clicked, Salesforce records the click as one view and distinguishes between internal and external views. An internal view is a view by a Salesforce user, for example, clicking the delivery URL on the delivery detail page or the View option on the Content Deliveries related list is an internal view. The Content Deliveries related list provides a count of all views for each delivery. Open the delivery details page to see information about a specific view.



**Note:** For password-protected content deliveries, a view is recorded when the recipient clicks on the delivery URL regardless of whether he or she enters the password and views the delivery.

- Salesforce CRM Content users can deliver content from shared libraries or a personal library.

## Storage Implications

In Salesforce CRM Content, file storage is consumed when content is published to shared libraries or saved to a private library. Creating content deliveries does not have an additional affect on storage limits, but users who frequently upload files to their personal libraries for the purpose of content delivery should consider their organization's file-storage limits. Administrators can use reporting to identify which users are consuming the most storage and which files are largest in size.


For non-Salesforce CRM Content users, file storage is consumed each time a content delivery is created. Once uploaded to Salesforce, a file cannot be reused for multiple content deliveries. Creating multiple

content deliveries with the same file requires uploading the file each time. Deleting a content delivery deletes the source file in Salesforce, thus increasing file-storage space.

## Creating Content Deliveries

To create a new content delivery:

1. From the Content Deliveries related list, Related Content related list, or the content details page, click **Deliver Content**.
2. Upload a file or confirm the file name. If you are a Salesforce CRM Content user, search for the content in your libraries that you want to deliver. Salesforce CRM Content users can search for content in [shared libraries](#) or a [personal library](#).
3. Optionally, modify the `Delivery Name` field. This is the name that identifies your content delivery in Salesforce. We recommend using a name that will make the delivery easily distinguishable from other deliveries on the same record. The default delivery name includes the file name and today's date.
4. Select the delivery methods that determine how your content can be viewed. The options that appear depend on the file format you uploaded.
  - Choose `Allow Recipient to View in the Browser` to create an online version of the file that recipients can view in their browser.
  - Choose `Allow Recipient to Download as [file type] file` to allow the recipient of your content delivery to view the content in its original format. For example, if you uploaded a Microsoft® Word file, this field will be `Allow download as .doc file`.

 **Note:** If a preview of the file doesn't exist in Salesforce, users can download the delivered file regardless of whether or not downloading is allowed. File previews are made the first time they are requested in Salesforce, but not before. Viewing a file's detail page or posting it to a feed generate file previews.

  - Choose `Allow Recipient to Download as PDF` to allow recipients to download a .pdf version of the file. This option is only available for Microsoft® PowerPoint, Word, and Excel files.
5. Select `Notify Me of First View or Download` if you want to receive an email the first time your recipient clicks the content-delivery URL.
6. If the content you are delivering is time-sensitive, select the `Remove Access to Content on` checkbox and enter an expiration date. By default, the expiration date is 90 days from the current date. After creating your content delivery, you can change the expiration date at any time on the delivery detail page.
7. Optionally, select `Require a Password to Access Content`. When you create the content delivery you will receive a password to include with the delivery URL that you send to your recipients. The password is available for the life of the delivery on the delivery detail page.
8. Optionally, use the lookup to associate your content delivery with a Salesforce record. The record you were viewing when you clicked **Deliver Content** is selected by default.
9. Click **Save & Next**. Your delivery will usually be ready within a few moments, but you can click **Notify Me** to exit the content delivery wizard and be notified via email when your content delivery is ready.

10. If you did not exit the content delivery wizard, click **Preview** to verify that you are satisfied with the delivery.



**Important:** Formatting in the original file may not display correctly in the online version. If you chose `Allow Recipient to View in the Browser`, preview your content delivery before sending its URL to your recipients. If you are not happy with the quality of the online version, click **Previous** and choose to make your content available in its original file format or a PDF only.

11. Copy and paste the delivery URL and, if applicable, its password into an email or instant message for delivery. The URL is available on the delivery detail page. For more information, see [Viewing and Editing Content Deliveries](#).