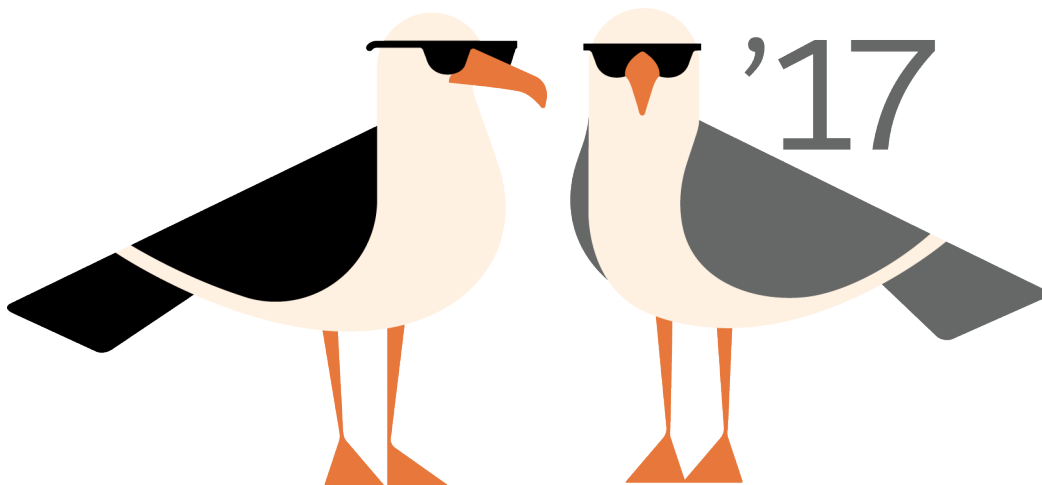




Set Up Salesforce Files Sync

Salesforce, Summer '17



CONTENTS

| | |
|---|---|
| Enable Salesforce Files Sync | 1 |
| Grant Users Access to Salesforce Files Sync | 2 |
| Grant Access to Salesforce Files Sync Using a Permission Set | 2 |
| Enable Salesforce Files Sync for Profiles | 3 |
| Install Salesforce Files Sync | 4 |
| Configure File Upload and Download Security Settings | 5 |
| Tips and Best Practices for Administering Salesforce Files Sync | 6 |

ENABLE SALESFORCE FILES SYNC

Enable Salesforce Files Sync to allow users to sync files between their devices and Salesforce.

1. From Setup, enter *Salesforce Files* in the Quick Find box.
2. Under **Settings**, select **General Settings**.
3. At the bottom of the Salesforce Files Sync Settings page, click **Edit**.
4. Select **Enable Files Sync**.
5. Click **Save**.

Salesforce Files Sync is now enabled for your organization.

Next, grant users access to Salesforce Files Sync.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Salesforce Files Sync:

- Customize Application

GRANT USERS ACCESS TO SALESFORCE FILES SYNC

After enabling Salesforce Files Sync, grant your users access by either creating and assigning a permission set or by granting permission on profiles.

IN THIS SECTION:

[Grant Access to Salesforce Files Sync Using a Permission Set](#)

Permission sets are an easy way to enable Salesforce Files Sync for users.

[Enable Salesforce Files Sync for Profiles](#)

Enable Salesforce Files Sync for all users with particular standard profiles, or for custom profiles specific to your Salesforce organization.

USER PERMISSIONS

To enable Salesforce Files Sync for users:

- Customize Application

Grant Access to Salesforce Files Sync Using a Permission Set

Permission sets are an easy way to enable Salesforce Files Sync for users.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Fill out the required fields.

Label

The unique label for the permission set. For example, you might call this permission set "Salesforce Files Sync Enabled".

API Name

The unique name used by the Force.com API.

Description

A description of this permission set. For example, "Enables Salesforce Files Sync for assigned users. Salesforce Files Sync allows users to automatically sync files across devices."

4. Select a user license option.



Note: If you plan to assign this permission set to users with both Salesforce and Chatter Only licenses, select — *None* —.

5. Click **Save**.
The overview page for your new permission set appears.
6. Under System, click **System Permissions**.
7. At the top of the System Permissions list, click **Edit**.
8. Select **Sync Files**.
9. Click **Save**.

Assign the permission set to users who should have access to Salesforce Files Sync.

USER PERMISSIONS

To create a permission set:

- Customize Application

Enable Salesforce Files Sync for Profiles

Enable Salesforce Files Sync for all users with particular standard profiles, or for custom profiles specific to your Salesforce organization.

1. From Setup, enter *Profiles* in the *Quick Find* box, then select **Profiles**.
2. Select the profile that will have the Salesforce Files Sync permission.
3. On the profile detail page, click **Edit**.
4. Under Administrative Permissions, select **Sync Files**.
5. Click **Save**.

USER PERMISSIONS

To enable Salesforce Files Sync for profiles:

- Customize Application

INSTALL SALESFORCE FILES SYNC

The Salesforce Files Sync client syncs files between user's computers and Salesforce. Users can also access synced files from Salesforce 1. To use Salesforce Files Sync, we recommend:

| System Requirement | Windows | Mac |
|-----------------------------|--|--|
| Supported operating systems | Microsoft® Windows® 7 and later | Apple® Mac OS X 10.8 Mountain Lion and later |
| Processors | 2.33 GHz or faster x86-compatible processor, or Intel® Atom™ 1.6 GHz or faster processor for netbook devices | Intel® Core™ Duo 1.83 GHz or faster processor |
| Memory | 512 MB of RAM (1 GB recommended) | 512 MB of RAM (1 GB recommended) |
| Hard drive | 4 GB of free space recommended for sync operations | 4 GB of free space recommended for sync operations |

Users can download Salesforce Files Sync from Chatter.

1. From your personal settings, enter *Files Sync* in the *Quick Find* box, then select **Salesforce Files Sync**. Multiple results? Select the one under Personal Setup.
2. Click the **Download** button.
3. Follow the installation instructions for your operating system.
4. Log in with your Salesforce credentials.

SEE ALSO:

[Salesforce Help: Personalize Your Salesforce Experience](#)

CONFIGURE FILE UPLOAD AND DOWNLOAD SECURITY SETTINGS

To provide more security, control the way some file types are handled during upload and download.

To manage file upload and download settings:

1. From Setup, enter *File Upload and Download Security* in the Quick Find box, then select **File Upload and Download Security**.
2. Click **Edit**.
3. To prevent users from uploading files that can pose a security risk, select `Don't allow HTML uploads as attachments or document records`.

This setting blocks the upload of these MIME file types: `.html`, `.htt`, `.mht`, `.svg`, `.swf`, `.thtml`, and `.xhtml`.



Warning: Keep the following in mind when selecting this option:

- If your organization uses the partner portal to give your partner users access to Salesforce, we don't recommend enabling this setting. Enabling this setting prevents your organization from customizing the appearance of your partner portal.
 - HTML attachments are not permitted on solutions, regardless of whether this security setting is enabled. In addition, this setting does not affect attachments on email templates; HTML attachments on email templates are always permitted.
 - After this setting is enabled, previously-uploaded HTML documents and attachments are unaffected. However, when users attempt to view an HTML attachment or document, their browser first prompts them to open the file in the browser, save it to their computer, or cancel the action.
4. Set download behavior for each file type:
 - a. **Download** (recommended): The file, regardless of file type, is always downloaded.
 - b. **Execute in Browser:** The file, regardless of file type, is displayed and executed automatically when accessed in a browser or through an HTTP request.
 - c. **Hybrid:** Salesforce Files are downloaded. Attachments and documents execute in the browser.
 5. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

USER PERMISSIONS

To configure file upload and download settings:

- [Customize Application](#)

TIPS AND BEST PRACTICES FOR ADMINISTERING SALESFORCE FILES SYNC

Monitor Salesforce Files Sync access and usage with the Salesforce Files Sync administrator tools.

View When and How Users Access Salesforce Files Sync

Once Salesforce Files Sync has been enabled for users, review how often users access the application from their desktop, or how they share files.

- The Login History page lists logins to the Salesforce Files Sync desktop application under the Application column as “Salesforce Files”. To view these logins, export your organization’s login history to a CSV file or create a custom list view with the Application column displayed prominently.
- View an individual user’s login history on their User detail page in the Login History related list.

Revoke Access to Salesforce Files Sync

Things happen—users have their laptops stolen, people leave the company. Revoke access to Salesforce Files Sync to prevent data from falling into the wrong hands.

- On mobile devices, synced files are included in the Salesforce1 application. If mobile security has been compromised, revoke the user’s access to the Salesforce1 application.
- On desktop and laptop computers, Salesforce Files Sync stores synced files in the “Salesforce Files Sync” folder. When you disable the “Sync Files” permission for an individual user, the files no longer sync with Salesforce. However, previously synced files remain in the Salesforce Files Sync folder on the user’s computer.

To make disabling Salesforce Files Sync for individual users easier, we recommend [enabling Salesforce Files Sync using a permission set](#) on the user record rather than [enabling the feature for profiles](#).