



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 and public links* in the Quick Find box, and select **Content Deliveries and Public Links**.
2. Click **Edit**, and then select *Content Deliveries feature can be enabled for users, Public Links can be enabled for users (Requires Content Deliveries), and Content Deliveries and Public Links can be enabled to let communities users share files managed by libraries (Requires Content Deliveries)*.
3. Choose a default option for content-delivery passwords. Because users can send content-delivery URLs to leads, customers, or any unauthenticated user, Salesforce recommends requiring password protection if your users plan to send confidential documents via content delivery. The options 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 selected 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 selected by default. Users can deselect the option if they don't 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 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.
- Files within libraries are governed by settings within the library, so they require an extra setting, in addition to the user permissions. To let a user share files managed by a library, enable **Deliver Content** for that user in the library.

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 50,000 and the amount of bandwidth allocated to content deliveries is limited to 50 GB. If recipients try to view deliveries after rate limit are exceeded, they'll be prompted 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 isn't supported for online views.

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

- Content deliveries require Adobe Flash version 9.0.115. If recipients don't have Flash installed, they can download it.
- Customer portal and partner portal users can't 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 someone clicks a content delivery's URL, 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. To see information about a specific view, open the delivery details page.



Note: For password-protected content deliveries, a view is recorded each time recipients click the delivery URL regardless of whether they enter the password and view 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 doesn't have an extra effect 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 who consumes the most storage and which files are largest.

For non-Salesforce CRM Content users, file storage is consumed each time a content delivery is created. After a file is uploaded to Salesforce, it can't be reused for multiple content deliveries. Users need to upload the file each time they want to create a content library. Deleting a content delivery deletes the source file in Salesforce, and increases 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.
3. Optionally, modify the `Delivery Name` field. This name 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 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](#).