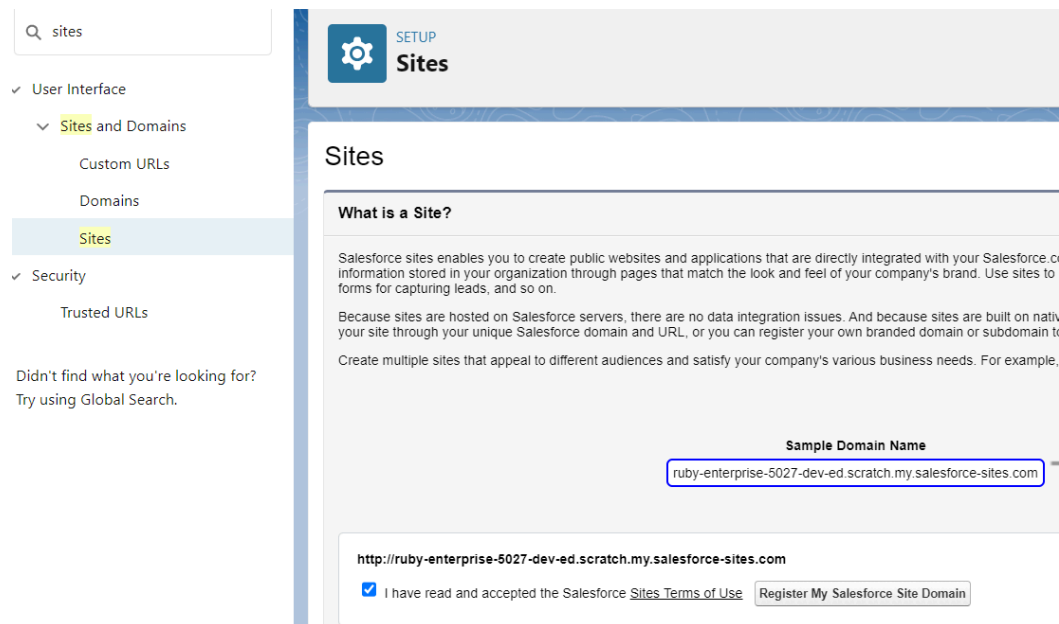


Prerequisites for External File Share link

1. Create Site

- a. Register My Salesforce Site Domain if not already registered
 - i. Navigate to Salesforce Setup.
 - ii. Open Sites.
 - iii. Check "Sites Terms of Use" checkbox.
 - iv. Click on "Register My Salesforce Site Domain."



- b. Create a New Site
 - i. Click on New button
 - ii. Add the below required details and click on "Save."
 1. Select "SiteLogin" Page for Active Site Home Page
 2. Check "Active"
 3. Select "Allow framing of site pages on external domains (Good protection)" under Clickjack Protection Level.

Site Edit

New Site

Save

Cancel

Site Label

XfilesPro

Site Name

XfilesPro

Site Description

Site Contact

User User

Default Record Owner

User User

Default Web Address

https://ruby-enterprise-0027-dev-ed.scratch.my.salesforce-sites.com/

Active

☒

Active Site Home Page

SiteLogin

Inactive Site Home Page

InMaintenance

Site Template

SiteTemplate

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class

Enable Feeds

☐

Clickjack Protection Level

Allow framing of site pages on external domains (Good protection)

Lightning Features for Guest Users

☒

Enable Content Sniffing Protection

☒

Enable Browser Cross Site Scripting Protection

☒

Referrer URL Protection

☒

Allow only required cookies for this site

☐ More Details

Redirect to custom domain

☒

Cache public Visualforce pages

☒ More Info

Guest Access to the Payments API

☐

Guest Access to the Support API

☐

- c. Public Access Settings
- i. After the site is created, click on “Public Access Settings.”

Site Details

XfilesPro

Back to List Sites

Site Detail

Edit

Public Access Settings

Login Settings

URL Redirects

Deactivate

Site Label

XfilesPro

Site Description

Active

Active Site Home Page

SiteLogin

Inactive Site Home Page

InMaintenance

Site Template

SiteTemplate

Analytics Tracking Code

Clickjack Protection Level

Allow framing of site pages on external domains (Good protection)

Enable Content Sniffing Protection

☒

Referrer URL Protection

☒

Guest Access to the Payments API

☐

Default Record Owner

User User

Cache public Visualforce pages

☒ More Info

Created By

User User

Site Name

XfilesPro

Site Contact

User User

Site Favorite Icon

Enable Feeds

☐

URL Rewriter Class

Lightning Features for Guest Users

☒

Enable Browser Cross Site Scripting Protection

☒

Allow only required cookies for this site

☐ More Details

Guest Access to the Support API

☐

Redirect to custom domain

☒

Last Modified By

User User

Custom URLs

Action	Domain Name	Path	Current Domain Configuration Option	Certificate and Key	Certificate Expiration Date
Edit Del View Preview as Admin	ruby-enterprise-0027-dev-ed.scratch.my.salesforce-sites.com	/	Salesforce Sites Domain		

- ii. Click on “View Users”.

Profile

XfilesPro Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Settings](#)

Profile Detail

Edit

View Users

Name

XfilesPro Profile

User License

Guest User License

Description

Created By

User User

Modified By

User User

Page Layouts

Standard Object Layouts			
Global	Global Layout	Product Consumed State	Product Consumed State Layout
Email Application	Not Assigned	Product Consumption Schedule	Product Consumption Schedule Layout
Home Page Layout	Home Page Default	Product Required	Product Required Layout
Access	Access Layout	Product Service Campaign	Product Service Campaign Layout
Account	Account Layout	Product Service Campaign Item	Product Service Campaign Item Layout
Address	Address Layout	Recordset Filter Criteria	Recordset Filter Criteria Layout
Asset	Asset Layout	Recordset Filter Criteria Rule	Recordset Filter Criteria Rule Layout
Asset Relationship	Asset Relationship Layout	Resource Absence	Resource Absence Layout
Assigned Resource	Assigned Resource Layout	Resource Capacity	Resource Capacity Layout

- iii. Click on the username.

SETUP
Profiles

XfilesPro Profile

On this page you can create, view, and manage users.
To get more licenses, use the 'Your Account' app. [Let's Go](#)

Action	Full Name	Alias	Username
Edit	Site Guest User, XfilesPro	guest	xfilespro@0007a0000070pvaal.org.force.com

- iv. Add the "XfilesPro Guest User" Permission Set for the Site user.

User
test4march Site Guest User

[Permission Set Assignments](#) | [Permission Set Assignments - Activation Required](#) | [Permission Set Group Assignments](#) | [Per](#)

User Detail

[Edit](#) [Sharing](#)

Name	test4march Site Guest User
Alias	guest
Email	test4march@00do1000001@armaa.org.force.com
Username	test4march@00do1000001@armaa.org.force.com
Nickname	test4march
Division	
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)
Locale	English (United States)
Language	English
Federation ID	
App Registration: One-Time Password Authenticator	i
App Registration: Salesforce Authenticator	i
Security Key (U2F or WebAuthn)	i
Lightning Login	i
Temporary Verification Code (Expires in 1 to 24 Hours)	Generate i
Created By	Shrilakshmi, 3/4/2024, 2:16 AM

[Edit](#) [Sharing](#)

Permission Set Assignments

[Edit Assignments](#)

Action	Permission Set Label	Date Assigned
Del	XfilesPro Guest User	3/11/2024


2. Add the site URL in the App Settings.

Add the site URL in the App Settings as shown below:

Active Site Home Page	XFILES.SiteLogin [Preview]	Site Favorite Icon	
Inactive Site Home Page	XFILES.InMaintenance [Preview]	Site Robots.txt	
Site Template	XFILES.SiteTemplate [Preview]	Enable Feeds	<input type="checkbox"/>
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by any page (No protection)	Lightning Features for Guest Users	<input checked="" type="checkbox"/> i
Enable Content Sniffing Protection	<input checked="" type="checkbox"/> i	Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/> i
Referrer URL Protection	<input checked="" type="checkbox"/> i	Allow only required cookies for this site	<input type="checkbox"/> i More Details
Guest Access to the Payments API	<input type="checkbox"/> i	Guest Access to the Support API	<input type="checkbox"/> i
Default Record Owner	Shrilakshmi i	Redirect to custom domain	<input checked="" type="checkbox"/> i
Cache public Visualforce pages	<input checked="" type="checkbox"/> i [More Info]		
Created By	Shrilakshmi , 3/4/2024 2:16 AM	Last Modified By	Shrilakshmi , 3/4/2024 10:...

[Edit](#) [Public Access Settings](#) [Login Settings](#) [URL Redirects](#) [Deactivate](#)

Custom URLs					
Action	Domain Name	Path	Current Domain Configuration Option	Certificate and Key	Certificat
Edit Del View Preview as Admin	dream-computing-7030-dev-ed.scratch.my.salesforce-sites.com	/	Salesforce Sites Domain		

 Settings

Organization Defaults User/Profile

General

File

Folder

Can Move Files ⓘ

☐

Can Rename File ⓘ

☐

Enable Inhouse Preview ⓘ

☒

Make File Private ⓘ

☐

Site URL ⓘ

3. Create Sharing Rules

Create sharing rules for the following objects:

1. Cloud Storage Provider
2. XFP Share Link Info
3. XFP Folder Location
4. XFP Object Setup

1. Sharing rules for Cloud Storage Provider:

Step 1: Rule Name

Label


Rule Name

Description

Step 2: Select your rule type

Rule Type ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

 This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate.

Criteria	Field	Operator	Value	
	<input type="text" value="Is Active"/>	<input type="text" value="equals"/>	<input type="text" value="true"/>	<input type="button" value="AND"/>
	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	<input type="button" value="AND"/>
	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	<input type="button" value="AND"/>
	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	<input type="button" value="AND"/>
	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	

[Add Filter Logic...](#)

追加オプション ☐ Include records owned by high-volume users

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

2. Sharing rules for XFP Share Link Info:

Step 1: Rule Name

Label


Rule Name

Description

Step 2: Select your rule type

Rule Type ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

 This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate.

Criteria	Field	Operator	Value	
	<input type="text" value="XFP Share Link Info Name"/>	<input type="text" value="contains"/>	<input type="text" value="SLI"/>	<input type="button" value="AND"/>
	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	<input type="button" value="AND"/>
	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	<input type="button" value="AND"/>
	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	<input type="button" value="AND"/>
	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	

[Add Filter Logic...](#)

追加オプション ☐ Include records owned by high-volume users

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

3. Sharing rules for XFP Folder Location:

Step 1: Rule Name

Label

XFP_Share

Rule Name

XFP_Share

Description

Step 2: Select your rule type


Rule Type

☐ Based on record owner

☐ Based on criteria

☒ Guest user access, based on criteria

Step 3: Select which records to be shared



This sharing rule grants access to guest users without login credentials. By modifying the default settings in i without logging in. To secure your site and its data from guest users, consider all the use cases and implicati data to guest users related to this change from default settings.

Criteria

Field	Operator	Value	
Location Id	not equal to	null	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

追加オプション

☐ Include records owned by high-volume users

Step 4: Select the users to share with

Share with

test4march Site Guest User

Step 5: Select the level of access for the users

Access Level

Read Only

4. Sharing rules for XFP Object Setup:

Step 1: Rule Name

Label

XFP_Share

Rule Name

XFP_Share

Description

Step 2: Select your rule type


Rule Type

☐ Based on record owner

☐ Based on criteria

☒ Guest user access, based on criteria

Step 3: Select which records to be shared



This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and imp Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria

Field	Operator	Value	
Object Name	not equal to	null	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

追加オプション

☐ Include records owned by high-volume users

Step 4: Select the users to share with

Share with

test4march Site Guest User

Step 5: Select the level of access for the users

Access Level

Read Only