

# S3-Link & Config Workbook

Svet Voloshin



# Salesforce File Management Challenge

- There is nothing wrong with using Salesforce Files if you don't have too many of them or a large org.
- Salesforce allots 10 GB of file storage per org + 2GB/user
- In the Enterprise-size company, this translates into gigabytes, even terabytes of storage
- For small companies this is a challenge
- Use Cases:
  - *Lots of attachments are submitted with Leads via FormAssembly.*
  - *Numerous files are attached to Email-to-Case*
  - *Community Users upload a lot of files*
- Problem:
  - Salesforce storage comes at a premium and you can quickly run out of file storage space.
- Solution:
  - Off-platform file storage
- Challenge:
  - How to keep records and files in sync?
  - How does one move incoming files off-platform automatically?
  - What happens to the files that are offloaded?
- S3-Link connects a Salesforce org to AWS S3 buckets and automates file offloading to S3
- S3-Link then deletes the files in Salesforce, thereby keeping Salesforce storage lean
- S3-Link automates the creation of pre-signed links for on-demand file retrieval from S3



# S3-Link - Amazon S3 Connector (Document Storage & Management Solution)

By Neilon Technologies

Salesforce - Amazon S3 Connector (File Storage Solution) - 30 Days Trial

★★★★★ 4.96 Average Rating ([72 Reviews](#))

**Description:** S3-Link is a document management application (Salesforce to Amazon AWS S3 connector) that allows user to upload unlimited files without any file size limitation.

## Pro

1. No file size limit
2. Drag, drop & upload multiple files
3. Download & zip multiple files
4. File preview
5. File versioning
6. Attach files to SF records
7. Set attributes for file while upload
8. Windows like folder structure
9. Email public/passcode-protected upload or download links to external users
10. REST APIs for external tools
11. Annotate & edit S3 files
12. Archive SF files
13. Move files between SF records
14. Upload files in S3 using Apex
15. Track downloads, emails, previews
16. Integrate with S-Docs, Conga, DocuSign, Nintex, JustOn, Zapier, PDFTron

17. Auto move SF Files, Attachments, SF Reports, Email attachments in S3
18. Move SF files in S3 via Apex
19. Get base64 of S3 file in Apex
20. KMS Server Side Encryption
21. Browse & link S3 files with SF
22. Link S3 files with SF using SF Data loader
23. File search using meta data
24. Attach same file with multiple records
25. Upload files in S3 from flows
26. Sync S3 files for SF record
27. File access control
28. Supports SF Classic
29. Supports Wasabi & RSTOR

## Unlimited















1. Unlimited community licenses
2. Use in Salesforce1 Mobile app
3. Auto move chatter attachments in S3

# S3-Link Configuration Screen

Q Search...

S3-Link S3-Link Administration S3-File Explorer S3-File Search S3-Link Salesforce Files Migration S3-Files

## S3-LINK ADMINISTRATION

-  **System Configuration**  
Provide AWS Access Key Id, Secret Key and other values needed to configure application for your organization.
-  **File Explorer Page Configuration**  
Configure File Explorer Interface for your organization.
-  **File Upload Page Configuration**  
Configure default values and fields needs to be display while upload files.
-  **Import Files**  
Import file(s) and folder(s) in your Salesforce instance from Amazon S3.
-  **File Import Configuration**  
System can import Amazon S3 files as Salesforce attachments. Set various properties for import.
-  **File Export Configuration**  
The system can auto move content documents, standard attachments and email attachments in Amazon S3. Set various properties for the auto move.
-  **Email Files Configuration**  
Set configuration to get recipients, email templates and other values for different objects.
-  **S3-Link Access Management**  
Grant or revoke S3-Link access for your organization users.
-  **File Management Configuration**  
Configure file management settings such as allow to delete file.
-  **Cleanup Files**  
Remove file(s) and folder(s) from your Salesforce instance which is no longer exists in Amazon S3.
-  **Email Files to Users**  
Send an email to users with the download links for S3 files.
-  **Tree Configuration**  
Set tree configuration to configure various tree hierarchies for your organization.
-  **Folder Architecture Configuration**  
Setting for folder architecture.
-  **Salesforce Report Export Configuration**  
The system can auto move Salesforce reports to Amazon S3. Set various properties for the move.

# Authentication

S3-Link Administration | S3-File Explorer | S3-File Search | S3-Link Salesforce Files Migration | S3-Files

## S3-LINK ADMINISTRATION SYSTEM CONFIGURATION

### System Configuration

Provide AWS Access Key Id, Secret Key and other values needed to configure application for your organization.

[Save](#) [Reset to System Default](#)

AWS Access Key Id

AWS Secret Key

Client Side Encryption Key

KMS Master Key

"From" Email Address for Job Status

Block File Types(Download)

Enable Virtual Hosting for Buckets: No

Grant Modify All Access to S3-Link Users: Yes

Max File Size (KB)

Send Job Status Email to Logged In User: No

Send Job Status Email to Neilon Support: No

Static Resource for Customized UI

Track File Download: Yes

Track File Mails: Yes

### Buckets (1)

[Create Bucket](#) [Link Buckets](#)

BUCKET NAME	DESCRIPTION	BUCKET REGION	DEFAULT	FILE VERSIONING?	AUTO IMPORT?	ACTION
		US West (N. California)	✓	✓	<input type="checkbox"/>	↓ ×

- User is authenticated using a Root User credential which is created with AWS
- Buckets are selected from within the S3-Link interface in Salesforce
- File security can follow Salesforce record security

# Amazon S3 Interface

The screenshot shows the Amazon S3 console interface. At the top, there's a navigation bar with the AWS logo, 'Services', a search bar, and utility icons. A left-hand navigation pane lists various S3 features like Buckets, Access Points, and Storage Lens. The main content area displays a bucket with a breadcrumb trail 'Amazon S3 > Buckets > [bucket name]'. Below the bucket name, there are tabs for 'Objects', 'Properties', 'Permissions', 'Metrics', 'Management', and 'Access Points'. The 'Objects' tab is active, showing a list of 6 objects, all of which are folders. The folders are: Accounts/, Contacts/, DocuSign Status/, Email Messages/, Leads/, and Opportunities/. Above the list, there are action buttons for 'Copy S3 URI', 'Copy URL', 'Download', 'Open', and 'Delete'. There is also a search bar for finding objects by prefix and a 'Show versions' toggle.

Amazon S3 > Buckets > [bucket name]

Info

Objects | Properties | Permissions | Metrics | Management | Access Points

**Objects (6)**

Objects are the fundamental entities stored in Amazon S3. You can use [Amazon S3 inventory](#) to get a list of all objects in your bucket. For others to access your objects, you'll need to explicitly grant them permissions. [Learn more](#)

Refresh Copy S3 URI Copy URL Download Open Delete

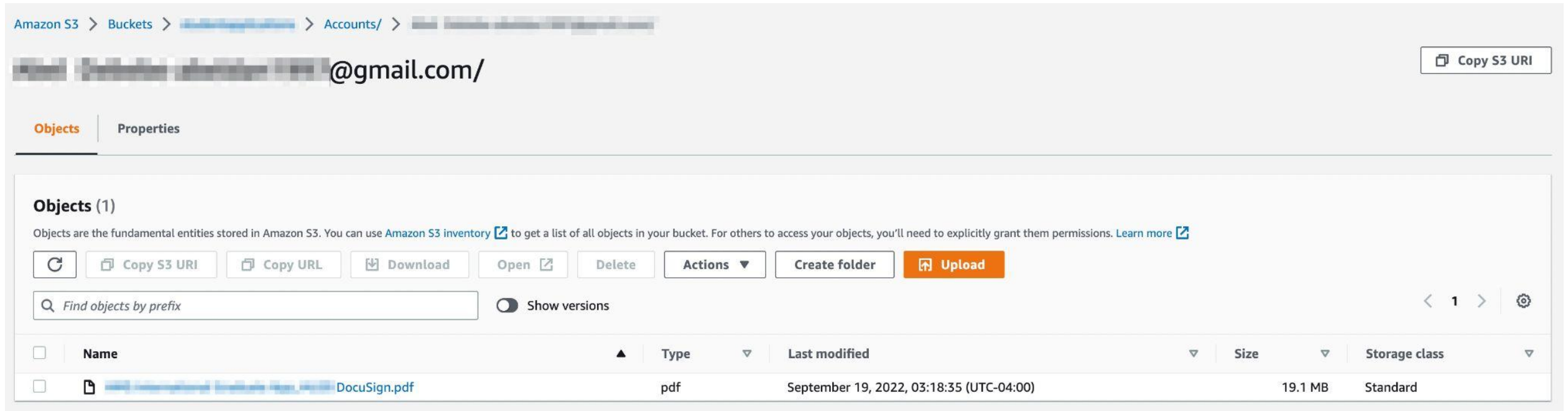
Actions Create folder Upload

Find objects by prefix Show versions < 1 > ⚙️


<input type="checkbox"/>	Name ▲	Type ▼	Last modified ▼	Size ▼	Storage class ▼
<input type="checkbox"/>	Accounts/	Folder	-	-	-
<input type="checkbox"/>	Contacts/	Folder	-	-	-
<input type="checkbox"/>	DocuSign Status/	Folder	-	-	-
<input type="checkbox"/>	Email Messages/	Folder	-	-	-
<input type="checkbox"/>	Leads/	Folder	-	-	-
<input type="checkbox"/>	Opportunities/	Folder	-	-	-

←S3 folders within a bucket follow the Salesforce Object Model

# Amazon S3 File naming



The screenshot shows the Amazon S3 console interface. The breadcrumb navigation at the top reads: Amazon S3 > Buckets > [redacted] > Accounts/ > [redacted]. Below this, the email address [redacted]@gmail.com/ is visible. A 'Copy S3 URI' button is located in the top right corner. The main content area has two tabs: 'Objects' (selected) and 'Properties'. Under the 'Objects' tab, there is a section titled 'Objects (1)' with a descriptive paragraph and a 'Learn more' link. Below the text is a toolbar with buttons for Refresh, Copy S3 URI, Copy URL, Download, Open, Delete, Actions, Create folder, and Upload. A search box labeled 'Find objects by prefix' and a 'Show versions' toggle are also present. At the bottom, a table lists the objects in the bucket.

<input type="checkbox"/>	Name	Type	Last modified	Size	Storage class
<input type="checkbox"/>	 [redacted] DocuSign.pdf	pdf	September 19, 2022, 03:18:35 (UTC-04:00)	19.1 MB	Standard

- S3 Files are named after the file in Salesforce
- S3 Folders are named after the Salesforce record

# Pre-signed Links

The screenshot shows the Amazon S3 console interface for a file named 'DocuSign.pdf'. The breadcrumb navigation at the top reads: Amazon S3 > Buckets > [redacted] > Accounts/ > [redacted]@gmail.com/ > [redacted] DocuSign.pdf. The file name 'DocuSign.pdf' is displayed prominently with an 'Info' link. Action buttons include 'Copy S3 URI', 'Download', 'Open', and 'Object actions'. Below the navigation are tabs for 'Properties', 'Permissions', and 'Versions'. The 'Object overview' section is expanded, showing the following details:

- Owner:** [redacted]
- AWS Region:** US West (N. California) us-west-1
- Last modified:** September 19, 2022, 03:18:35 (UTC-04:00)
- Size:** 19.1 MB
- Type:** pdf
- Key:** Accounts/[redacted] DocuSign.pdf
- S3 URI:** s3://[redacted]/Accounts/[redacted] DocuSign.pdf
- Amazon Resource Name (ARN):** arn:aws:s3:::[redacted]/Accounts/[redacted] DocuSign.pdf
- Entity tag (Etag):** 91a-[redacted].pdf
- Object URL:** https://[redacted]-s3.us-west-1.amazonaws.com/Accounts/[redacted] DocuSign.pdf

- Amazon S3 files are shared using pre-signed links, which contain the file security mechanism
- Whoever has the link, has access to a file
- More robust security is available
- Pre-signed links expire after 7 days
- S3-Link refreshes pre-signed links every 24 hours programmatically



# S3-Link File Export Configuration



## File Export Configuration

The system can auto move content documents, standard attachments and email attachments in Amazon S3. Set various properties for the auto move.

Save

Reset to System Default

Files up to 11 MB will be exported using this feature.

### ▼ Inbound Email Attachments

Group Email Attachments by Date?

Where to Export Inbound Email Files?

### ▼ Salesforce Attachments & Files

Auto Export Salesforce Files

Delete Salesforce Attachments & Files?

Auto Export Salesforce Notes

Add Date in File Name

Create S3-Link File for Salesforce File

Remove Files from Recycle Bin

Export Closed Cases Attachments

### ▼ Email Attachments

Export Closed Cases Email Attachments

Show Email Attachments in S3-Files List

Link Email Attachments to Email Parent

Export Inline Email Attachments

### ▼ Event Log Files

Auto Backup Event Log Files

Where to Export Event Log Files?

### ▼ Salesforce Objects to export Related Attachments & Files

#### Objects (6)

Add Objects

OBJECT NAME	OBJECT API NAME	ACTION
Account	Account	X
Contact	Contact	X

# S3-Link File Export Configuration (continued...)

DocuSign Envelope	dsfs__DocuSign_Envelope__c	×
DocuSign Status	dsfs__DocuSign_Status__c	×
Lead	Lead	×
Student Application	Opportunity	×

## ▼ Salesforce Objects to export Email Attachments & Files

### ⚙️ Objects (5)

[Add Objects](#)

OBJECT NAME	OBJECT API NAME	ACTION
Account	Account	×
Contact	Contact	×
DocuSign Envelope	dsfs__DocuSign_Envelope__c	×
DocuSign Status	dsfs__DocuSign_Status__c	×
Student Application	Opportunity	×

## ▼ Other Settings

Enable File Numbers ⓘ



Use Dash as File Number Separator ⓘ



- Here one selects the objects which are associated with the files that need to be offloaded
- There is also an option to delete the Salesforce File once it has been offloaded to S3

# S3-Link File Export Configuration (continued...)

## File Export Configuration

The system can auto move content documents, standard attachments and email attachments in Amazon S3. Set various properties for the auto move.

Save Reset to System Default

Files up to 11 MB will be exported using this feature.

### Inbound Email Attachments

Group Email Attachments by Date?

Where to Export Inbound Email Files?

### Salesforce Attachments & Files

Auto Export Salesforce Files

Delete Salesforce Attachments & Files?

Auto Export Salesforce Notes

Add Date in File Name

Create S3-Link File for Salesforce File

Remove Files from Recycle Bin

Export Closed Cases Attachments

### Email Attachments

Export Closed Cases Email Attachments

Show Email Attachments in S3-Files List

Link Email Attachments to Email Parent

Export Inline Email Attachments

### Event Log Files

Auto Backup Event Log Files

Where to Export Event Log Files?

### Salesforce Objects to export Related Attachments & Files

Objects (6)

Add Objects

OBJECT NAME	OBJECT API NAME	ACTION
Account	Account	X
Contact	Contact	X

# File Management - Soft Delete

S3-LINK ADMINISTRATION

FILE EXPORT CONFIGURATION ✕

S3-LINK ACCESS MANAGEMENT ✕

FILE MANAGEMENT CONFIGURATION ✕



## File Management Configuration

Control file management. Set access levels for various file operations.

### ▼ Delete Configuration

Soft Delete ⓘ

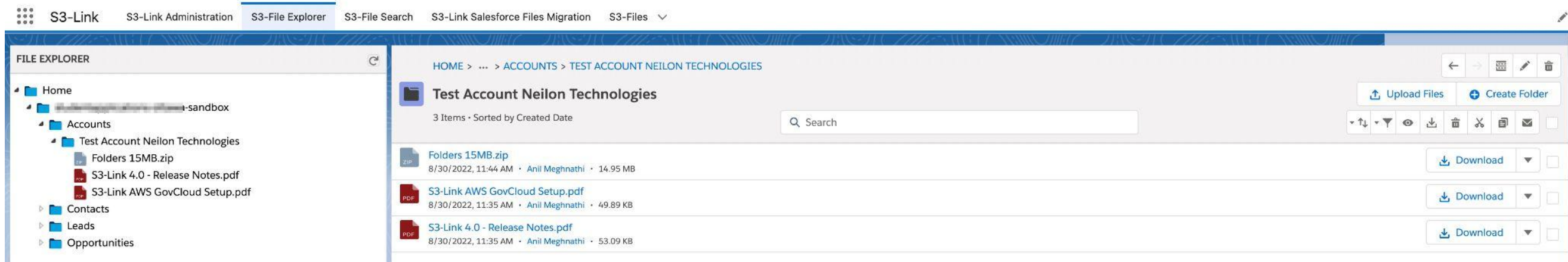


Allow Delete Latest Versions? ⓘ




- If checked, the File will not be deleted from S3, only the file reference

# S3-Link Folder Structure



- Accurate visual representation of the file structure in S3

# S3-File Object

 S3-File **Llama Test 2.pdf**







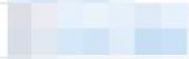












Category: Other      Size: 266 KB

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**Related**      **Details**








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Information

File Name	Llama Test 2.pdf		Harrisburg Integration	<input type="checkbox"/>	
Title	Llama Test 2		Ottawa Integration	<input type="checkbox"/>	
S3-Folder			Size	266 KB	
Created By	 , 8/2/2022, 10:05 AM		Category	Other	
Last Modified By	 , 8/2/2022, 10:05 AM		Last Uploaded By 	 Allen Reger	
DocuSign Status			Last Uploaded Date 	8/2/2022, 10:05 AM	
			Opportunity		
			Download URL 	<a href="https://s3.us-west-1.amazonaws.com/[blurred]">https://s3.us-west-1.amazonaws.com/[blurred]</a>	
					
				Signature=1ad562c729dcf456f6ed6ede58348a6d183b1ab566677de6e93f9d0f166a347c&X-Amz-SignedHeaders=host	

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Description

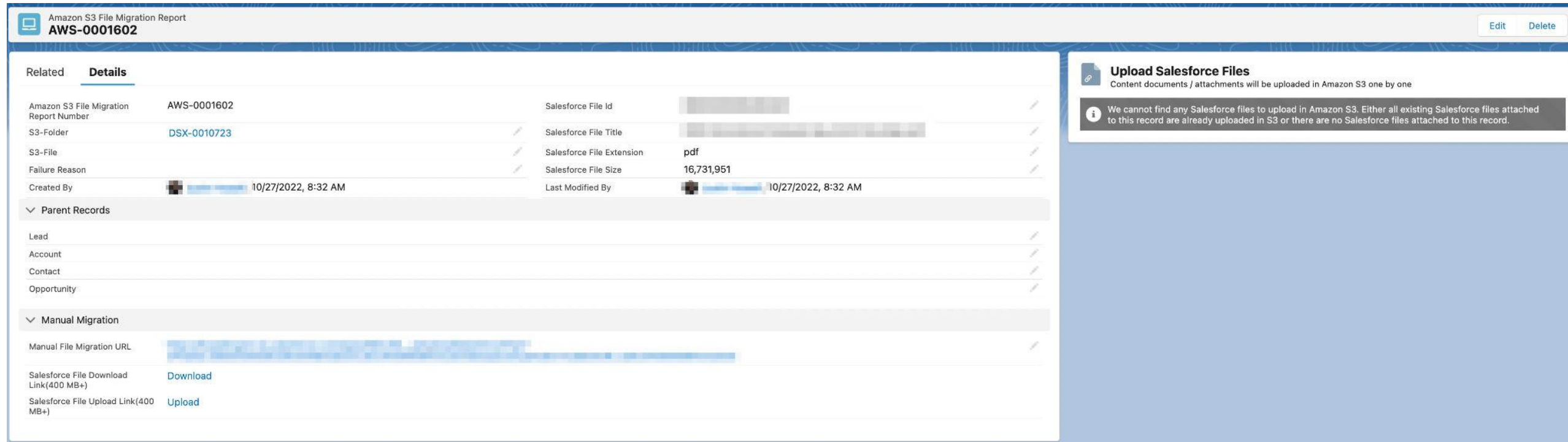
External Parent Id 		
Content Document Id 		
Content Type	application/pdf	
Description		

# S3-Files Component on a Lightning Page

The screenshot displays a Salesforce Lightning page for an Account. The page is divided into two main sections: a left-hand 'Details' section and a right-hand 'Related List' section. The 'Details' section includes fields for Account Name, Type, Phone, Account Owner, Parent Account, Student Details (Passport No., Country of Citizenship, City of Birth, Birthdate), Address Information, and System Information. The 'Related List' section contains several components: 'Related List Quick Links' (Related Contacts (1), Student Applications (1), S3-Files (1), Files (0), Notes (0)), a duplicate warning, 'Related Contacts (1)', 'Student Applications (1)', 'S3-Files (1)', 'Files (0)', and 'Notes (0)'. The 'S3-Files (1)' component is highlighted with a red border and shows a single file entry with a 'Created Date' of 9/1/2022, 4:53 AM. Below the 'Files (0)' component, there is an 'Upload Files' button and the text 'Or drop files'.

- S3-Files can be accessed natively and intuitively from within Salesforce

# Large File Migration



Amazon S3 File Migration Report  
AWS-0001602

Related **Details**

Amazon S3 File Migration Report Number	AWS-0001602	Salesforce File Id	[REDACTED]
S3-Folder	DSX-0010723	Salesforce File Title	[REDACTED]
S3-File		Salesforce File Extension	pdf
Failure Reason		Salesforce File Size	16,731,951
Created By	[REDACTED]	Last Modified By	[REDACTED]

Created: 10/27/2022, 8:32 AM

Parent Records

- Lead
- Account
- Contact
- Opportunity

Manual Migration

Manual File Migration URL: [REDACTED]

Salesforce File Download Link(400 MB+): [Download](#)

Salesforce File Upload Link(400 MB+): [Upload](#)

**Upload Salesforce Files**  
Content documents / attachments will be uploaded in Amazon S3 one by one

We cannot find any Salesforce files to upload in Amazon S3. Either all existing Salesforce files attached to this record are already uploaded in S3 or there are no Salesforce files attached to this record.

- There is a limitation on the AWS side which prevents the migration of files over 11MB via API
- There is a custom object/code functionality which can be added upon request (additional charges may apply), which facilitates semi-automatic upload of files to S3
- Best practice is to keep the files under 11MB



# S3-Link Presentation

- [S3-Link Presentation with Creator Anil Meghnathi](#)

The screenshot displays the S3-Link Administration interface within a web browser. The browser's address bar shows the URL: `tests3link-dev-ed.lightning.force.com/lightning/n/S3_Link_Administration`. The page title is "S3-Link Administration | Salesforce". The interface features a navigation menu with options: "S3-Link", "S3-Link Administration", "S3-File Explorer", "S3-File Search", "S3-Link Salesforce Files Migration", and "S3-Files". The main content area is titled "S3-LINK ADMINISTRATION" and "SYSTEM CONFIGURATION". It contains a grid of configuration cards, each with a gear icon and a title:

- System Configuration**: Provide AWS Access Key Id, Secret Key and other values needed to configure application for your organization.
- File Explorer Page Configuration**: Configure File Explorer Interface for your organization.
- File Upload Page Configuration**: Configure default values and fields needs to be display while upload files.
- Import Files**: Import file(s) and folder(s) in your Salesforce instance from Amazon S3.
- File Import Configuration**: System can import Amazon S3 files as Salesforce attachments. Set various properties for import.
- File Export Configuration**: The system can auto move content documents, standard attachments and email attachments in Amazon S3. Set various properties for the auto move.
- Email Files Configuration**: Set configuration to get recipients, email templates and other values for different objects.
- S3-Link Access Management**: Grant or revoke S3-Link access for your organization users.
- File Management Configuration**: Configure file management settings such as allow to delete file.
- Cleanup Files**: Remove file(s) and folder(s) from your Salesforce instance which is no longer exists in Amazon S3.
- Email Files to Users**: Send an email to users with the download links for S3 files.
- Tree Configuration**: Set tree configuration to configure various tree hierarchies for your organization.
- Folder Architecture Configuration**: Setting for folder architecture.
- Salesforce Report Export Configuration**: The system can auto move Salesforce reports to Amazon S3. Set various properties for the move.

The browser's taskbar at the bottom shows the time as 13:02 / 1:14:42 and the date as 2023-05-13. The system tray includes icons for network, volume, and battery.

# Config Workbook - documentation made easy



## Config Workbook

By CWB Software Tools India Private Limited  
Salesforce metadata, at your finger tips.

★★★★☆ 4.3 Average Rating ([164 Reviews](#))

### Categories

Admin & Developer Tools

### Supported Features

Lightning Ready

No Limits

Native App

[More Details](#)

**Starting at \$50** USD/Org(Sandbox or Production)/month

Discounts are available for nonprofits

[Pricing Details](#)

Get It Now

Test Drive

Quickly extract Salesforce metadata in Excel files, ex. Field Level Security, Profile permissions across objects, fields etc, Page Layouts , Permission set assignments, Apex, Visualforce. It also offers tools like Org Comparator, and Impact Analysis

Overview

Reviews

More Details



Free to Explore



Object & FLS





Profile basic Detail in excel format


# Start with Basic Details


Config Workbook Home CWB Tool Signatories Leases

DASHBOARD REPORTS (TRIAL) APEX DETAIL (TRIAL) TOOLS SETTINGS HELP


## Object

**Basic Details**  

Fetch basic object details like: Field level security for each profile, Custom button/links, Formula field details, and Record Types. ⓘ In case you run into heap issues, please reduce number of selected profiles and objects by clicking this  button.


**Object Basic Details** 

Download object basic detail like Object Name,Field Label,Field API name,Data Type etc.


**Full Details** 

**Deep dive into every other aspect of Object level metadata details like:**

- All of Object's and field's basic, system and other metadata level attributes
- Every possible details about Picklists, Formulas, Validation Rules, WebLinks, Action Overrides, List Views, Field Sets, Record Types, and Page Layouts.



**Full Object And Field Details Only** 

Download object and Field details in single worksheet

**Object Field Visibility on Layouts New!** 


**Deep dive into every other aspect of Object layout meta data details like:**

- Field visibility on layouts



**Object Page Layout Assignment New!**  

**Explore Page layout Assignment with Profile(s).**  
Explore which layout assigned to the record type and Profile.  
Know which layout is not used.


**RecordType Picklist Visibility New!**  
**Deep dive into RecordType Picklist Visibility**



## Profile

**Basic Profile Details**  


Explore basic details about profile like apex classes, pages, object permissions, applications and general user permissions.


**Full Profile Details** 

On top of all the basic permissions in above report, this reports additionally offers field level security, record type and layout assignments, record type visibilities, tabs, and login IP range.


**Object or Field Permission only**

[Download Current Org OLS !\[\]\(be68180ad67cd7df2cda3da316e4c1d5\_img.jpg\)](#) [Download Current Org FLS !\[\]\(39470b42647eb1dc6afcac97e71fe52c\_img.jpg\)](#)


**Download profile users with permission set assignment** 

**Profile Modified Detail** 


Explore who created or modified Profile .

**Tab Visibility Detail** 

Explore Tab Visibility in Profile .


**Profile Password Policy** 

Explore Profile Password Policy.

**Profile Comparison** 

Compare profiles based on Page Layouts, Custom permissions, Class access, Application visibilities, Field permissions, Object permissions, Page access, RecordType visibilities, Tab visibilities, and User permissions.

In this Salesforce org  
 In other Salesforce Orgs



# Sample Output in Excel

Account														
<b>Object Permission</b>														
<b>Profile</b>	<b>Create</b>	<b>Read</b>	<b>Edit</b>	<b>Delete</b>	<b>View All</b>	<b>Modify All</b>								
System Administrator	true	true	true	true	true	true								
Standard User	true	true	true	true	false	false								
<b>Custom Fields</b>														
Field Name	API Name	Data Type	Length	Mandatory	Is External-Id	PickList Values	Controlling Field	Default Value	Formula Default	Help Text	Standard User Readable	Standard User Editable	System Administrator Readable	System Administrator Editable
BillingLatitude	BillingLatitude_c	STRING(Formula)	1300	false	false						true	false	true	false
BillingLongitude	BillingLongitude_c	STRING(Formula)	1300	false	false						true	false	true	false
Level	kfsell_Level_pc	PICKLIST	255	false	false	Primary,Secondary,Tertiary					false	false	false	false
Ultimate Parent Account (Name)	Ultimate_Parent_Account_Name_c	STRING(Formula)	1300	false	false						true	false	true	false
Ultimate Parent Id	Ultimate_Parent_Id_c	STRING(Formula)	1300	false	false						true	false	true	false
<b>Standard Fields</b>														
Field Name	API Name	Data Type	Length	Mandatory	Is External-Id	PickList Values	Controlling Field	Default Value	Formula Default	Help Text	Standard User Readable	Standard User Editable	System Administrator Readable	System Administrator Editable
Account Number	AccountNumber	STRING	40	false	false						false	false	false	false
Account Source	AccountSource	PICKLIST	40	false	false	Advertisement,Employee					true	true	true	true
Annual Revenue	AnnualRevenue	CURRENCY	(18,0)	false	false						true	true	true	true
Billing Address	BillingAddress	ADDRESS	0	false	false						true	true	true	true
Billing City	BillingCity	STRING	40	false	false						false	false	false	false
Billing Country	BillingCountry	STRING	80	false	false						false	false	false	false
Billing Geocode Accuracy	BillingGeocodeAccuracy	PICKLIST	40	false	false	Address,NearAddress,Bldg					false	false	false	false
Billing Latitude	BillingLatitude	DOUBLE	(3,15)	false	false						false	false	false	false
Billing Longitude	BillingLongitude	DOUBLE	(3,15)	false	false						false	false	false	false
Billing Zip/Postal Code	BillingPostalCode	STRING	20	false	false						false	false	false	false
Billing State/Province	BillingState	STRING	80	false	false						false	false	false	false
Billing Street	BillingStreet	TEXTAREA	255	false	false						false	false	false	false
Created By ID	CreatedById	REFERENCE	18	true	false						true	true	true	true
Created Date	CreatedDate	DATETIME	0	true	false						true	true	true	true
Account Currency	CurrencyIsoCode	PICKLIST	3	false	false	EUR,USD		USD			true	true	true	true
Account Description	Description	TEXTAREA	32000	false	false						true	true	true	true
Account Fax	Fax	PHONE	40	false	false						true	true	true	true
First Name	FirstName	STRING	40	false	false						true	true	true	true
Account ID	id	ID	18	true	false						true	true	true	true
Industry	Industry	PICKLIST	40	false	false	Agriculture,Apparel,Bank					true	true	true	true
Informal Name	InformalName	STRING	80	false	false						true	true	true	true
Customer Portal Account	IsCustomerPortal	BOOLEAN	0	false	false			false			true	true	true	true
Deleted	IsDeleted	BOOLEAN	0	false	false			false			true	true	true	true
Exclude from territory assignment rule	IsExcludedFromRealign	BOOLEAN	0	false	false			false			false	false	false	false
Partner Account	IsPartner	BOOLEAN	0	false	false			false			true	true	true	true
Is Person Account	IsPersonAccount	BOOLEAN	0	false	false			false			true	true	true	true
Data.com Key	Jigsaw	STRING	20	false	false						true	true	true	true
Jigsaw Company ID	JigsawCompanyId	STRING	20	false	false						true	true	true	true
Last Activity	LastActivityDate	DATE	0	false	false						true	true	true	true
Last Modified By ID	LastModifiedById	REFERENCE	18	true	false						true	true	true	true
Last Modified Date	LastModifiedDate	DATETIME	0	true	false						true	true	true	true
Last Name	LastName	STRING	80	false	false						true	true	true	true
Last Referenced Date	LastReferencedDate	DATETIME	0	false	false						true	true	true	true
Last Viewed Date	LastViewedDate	DATETIME	0	false	false						true	true	true	true
Master Record ID	MasterRecordId	REFERENCE	18	false	false						true	true	true	true
Middle Name	MiddleName	STRING	40	false	false						true	true	true	true
Account Name	Name	STRING	255	false	false						true	true	true	true
Employees	NumberOfEmployees	INTEGER	8	false	false						true	true	true	true
Owner ID	OwnerId	REFERENCE	18	true	false						true	true	true	true
Ownership	Ownership	PICKLIST	40	false	false	Public,Private,Subsidiary					false	false	false	false
Parent Account ID	ParentId	REFERENCE	18	false	false						true	true	true	true
Assistant	PersonAssistantName	STRING	40	false	false						false	false	false	false
Asst. Phone	PersonAssistantPhone	PHONE	40	false	false						false	false	false	false
Birthdate	PersonBirthdate	DATE	0	false	false						false	false	false	false
Contact ID	PersonContactId	REFERENCE	18	false	false						true	true	true	true
Department	PersonDepartment	STRING	80	false	false						false	false	false	false
Do Not Call	PersonDoNotCall	BOOLEAN	0	false	false			false			false	false	false	false
Email	PersonEmail	EMAIL	80	false	false						false	false	false	false
Email Bounced Date	PersonEmailBouncedDate	DATETIME	0	false	false						true	true	true	true
Email Bounced Reason	PersonEmailBouncedReason	STRING	255	false	false						true	true	true	true
Email Opt Out	PersonHasOptedOutOfEmail	BOOLEAN	0	false	false			false			false	false	false	false
Fax Opt Out	PersonHasOptedOutOfFax	BOOLEAN	0	false	false			false			false	false	false	false

←note the tabs - one/object selected

# 8 Free Reports

## Setup

Include Managed Package Detail  If you want to include managed package(Installed App) details then please turn on this option.

Basic Report In Single Worksheet  Include History,Share and Feed object in Basic Report

Log Errors  Enable logging of any errors, exceptions and debug logs.

Save

## Configure Component(s)

- |   |  |   |
|---|--|---|
| <input checked="" type="checkbox"/> Object            | <input checked="" type="checkbox"/> Visual Flow            | <input checked="" type="checkbox"/> Create/Update/Delete Object/Field |
| <input checked="" type="checkbox"/> Profile           | <input checked="" type="checkbox"/> View Setup Audit Trail | <input checked="" type="checkbox"/> Impact Analysis                   |
| <input checked="" type="checkbox"/> Permission Set    | <input checked="" type="checkbox"/> Modified Details       | <input checked="" type="checkbox"/> Comparator                        |
| <input checked="" type="checkbox"/> StaticResource    | <input checked="" type="checkbox"/> Custom Application     | <input checked="" type="checkbox"/> Field Track                       |
| <input checked="" type="checkbox"/> Layout            | <input checked="" type="checkbox"/> Approval Process       | <input checked="" type="checkbox"/> Update Metadata                   |
| <input checked="" type="checkbox"/> Apex Code         | <input checked="" type="checkbox"/> Workflow               | <input checked="" type="checkbox"/> Generate Project.xml              |
| <input checked="" type="checkbox"/> Custom Label      | <input checked="" type="checkbox"/> License Info           | <input checked="" type="checkbox"/> Licensed Organization Detail      |
| <input checked="" type="checkbox"/> Folder Permission | <input checked="" type="checkbox"/> Lightning Component    | <input checked="" type="checkbox"/> System Overview                   |

## Allow non admin user to download meta data report

Don't worry your password will not store anywhere in system.It is allowed to non admin users(don't have ModifyAllData or ModifyMetadata permission) to download meta data report without updating profile or permission set.You can revoke access any time.

Enter your password

## License(TRIAL)

[Contact Support](#) [Show Download History](#)

Do you have promo code?

Enter your promo code

You are using trial version of this app.You can download only 8 reports. You have downloaded 6/8

# Bonus Content - Cloud Toolkit

## Toolkit for Salesforce

Welcome to the Toolkit for Salesforce! The tools and applications below provide assistance for common consulting processes and tasks - from diagnosing your org, comparing environments to activating and deactivating Salesforce components.

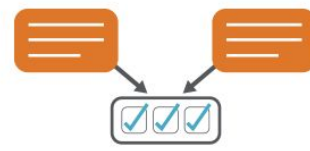
Help keep the Salesforce Toolkit free! Please donate to support development and Heroku running costs. Any value is appreciated.

Donate



### Org Doctor

Best practice based analytics to assess the health of any Salesforce Org.



### Org Compare

Compare customisation between two Salesforce Orgs and see a visual representation of the differences.



### Data Compare

Compare data between selected objects and fields for two Salesforce Orgs.



### Switch

Quickly and easily disable an Org's validation rules, workflows and Apex triggers.



### Schema Lister

List all of an Org's objects, fields and field attributes.



### Field Creator

Easily create custom fields in your Salesforce Org, including all field level security using an intuitive interface.



### Package Builder

Build a package.xml file listing all of an Org's metadata components.



### Code Scanner

Scans your Apex Code and looks for dependencies between classes and methods

- Completely Free!
- Developed by an NZ CTA Ben Edwards
- Huge time saver

# Config Switch - deactivate metadata fast!

## Salesforce Switch

Use the Off/On switches and the Enable All/Disable All buttons to specify what you want to activate and deactivate for your Org. Once ready, click Deploy to apply the changes to your Org. Deployment times will vary depending on the number of changes you are making. Triggers tend to take longer than Validation Rules and Workflows (especially for Production Orgs, as all Apex Tests must run on deployment).

You can click on the component names to have a look at what the components are made up of.

svoloshin@gmail.com.ctamodeling (CTA Modeling (SV))

Validation Rules Workflows Process Flows Triggers

ROLLBACK TO ORIGINAL DEPLOY CHANGES

Task	ENABLE ALL	DISABLE ALL
kfsell__If_Best_Action_Tied		ON
<b>sdfs__FormulaShare_Rule__mdt</b>	ENABLE ALL	DISABLE ALL
sdfs__Account_related_object_access_case		ON
sdfs__Account_related_object_access_contact		ON
sdfs__Account_related_object_access_opps		ON
sdfs__Sharing_reason_must_end_underscores_c		ON
sdfs__Users_must_be_shared_to_by_Id_field		ON
<b>sf_devops__Async_Operation_Result__c</b>	ENABLE ALL	DISABLE ALL
sf_devops__Operation_No_Change		ON
<b>sf_devops__Change_Bundle_Install__c</b>	ENABLE ALL	DISABLE ALL
sf_devops__Project_Reference		ON
<b>sf_devops__Change_Bundle__c</b>	ENABLE ALL	DISABLE ALL
sf_devops__Unique_Name		ON
<b>sf_devops__Change_Submission__c</b>	ENABLE ALL	DISABLE ALL
sf_devops__Prior_Remote_Reference_External_Only		ON
sf_devops__Work_Item_and_Repository_Same_Project		ON
<b>sf_devops__Environment__c</b>	ENABLE ALL	DISABLE ALL
sf_devops__Unique_Name		ON

## Salesforce Switch

Use the Off/On switches and the Enable All/Disable All buttons to specify what you want to activate and deactivate for your Org. Once ready, click Deploy to apply the changes to your Org. Deployment times will vary depending on the number of changes you are making. Triggers tend to take longer than Validation Rules and Workflows (especially for Production Orgs, as all Apex Tests must run on deployment).

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Validation Rules Workflows Process Flows Triggers

ROLLBACK TO ORIGINAL DEPLOY CHANGES

	ENABLE ALL	DISABLE ALL
Automated_Collections_Template		OFF
Certification_Created		ON
Create_a_Case_Community		ON
Create_ACR_for_Related_Record		ON
customer_satisfaction		ON
Delete_ACR_PE		ON
Impact_LMS_Certification_Completed		ON
Impact_LMS_Course_Completed		ON
Impact_LMS_Course_Started		ON
Impact_LMS_Lock_records		ON
Impact_LMS_Page_Completed		OFF
Impact_LMS_Quiz_Passed		OFF
net_promoter_score		ON
ProcessAsyncDistributionEvent		ON
Reparent_Application		ON
Set_To_Be_Deleted_on_ACR		ON
Share_Ultimate_Parent_Account		OFF
Strategy_Engine_for_Action_Plan		OFF
Strategy_Engine_for_Score_Card		OFF
Strategy_Engine_Populating_Oppty_Fields		OFF
Strategy_Engine_Populating_Oppty_Stage_Last_Modified_Date		OFF





# Happy holidays!!!



See you on January 4, 2023. Enjoy the festivities and don't forget to rest :)  
All the best wishes in the new year! Thank you for a wonderful 2022.

- Svet

# Thank you!

Stay tuned in the Slack channel for the next topic and please feel free to suggest areas of interest.

Ways to get in touch...

[Connect with me on LinkedIn](#)

Email: [svet@dc3me.com](mailto:svet@dc3me.com)

Obvious People Slack Channel:

#salesforce-academy

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