

Azure Integration

Configuration Guide

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Overview

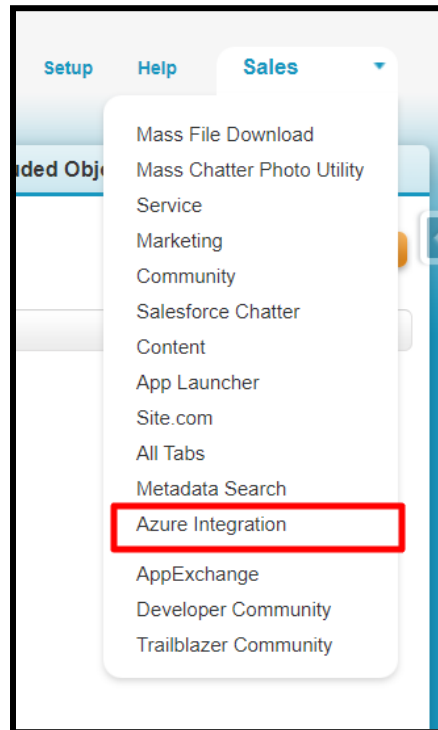
This configuration guide will help you in setting up an **Azure Integration** app. After configuring the app, you can use the [User Guide of Azure Integration](#) for detailed information on how to use the app.

Install the App in your Org

- With the help of the link [How Do I Install/Upgrade/Uninstall an AppExchange App](#), you can easily understand how to install, upgrade, or uninstall the app from the AppExchange.
- On AppExchange, search for and select **Azure Integration** and install it.

Accessing the app in Classic

- Click on the **App Menu** drop-down (present at the top right corner of the page).
- Select the **Azure Integration** App.

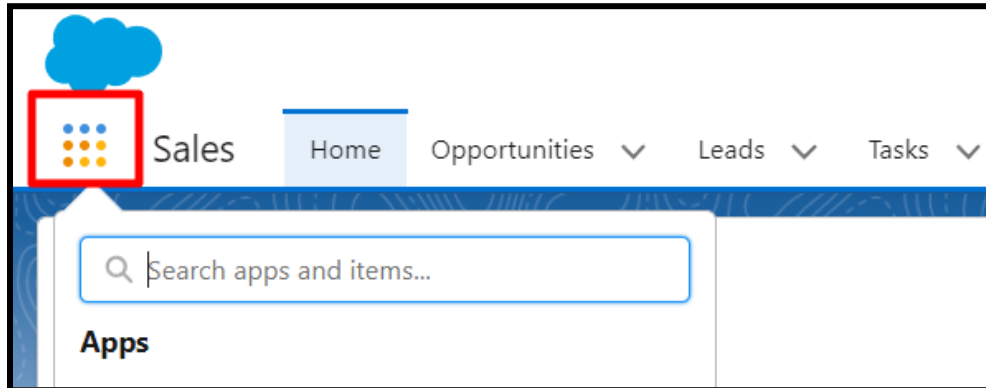


Accessing the app in Lightning

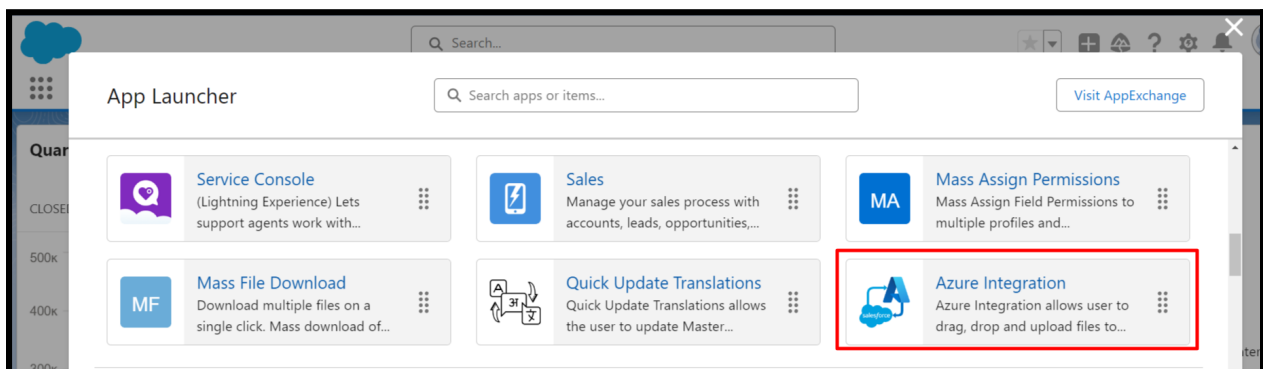
- **Note:** To switch between the classic and lightning experience. Click on **Switch to Lightning Experience**.



- Click on App Launcher as shown below :



- Select the **Azure Integration** App.



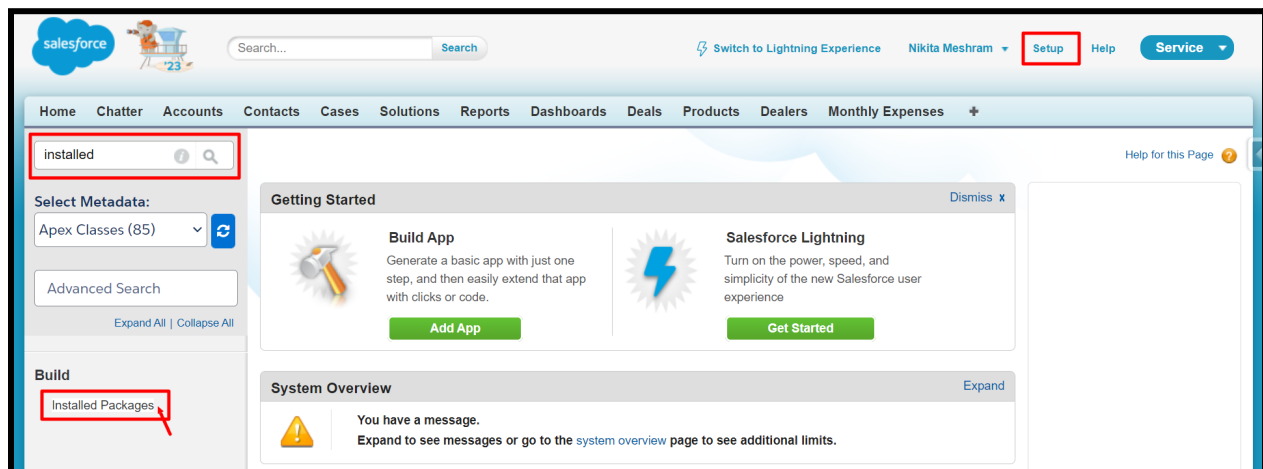
Post Installation Steps

Assign Azure Integration licenses to users

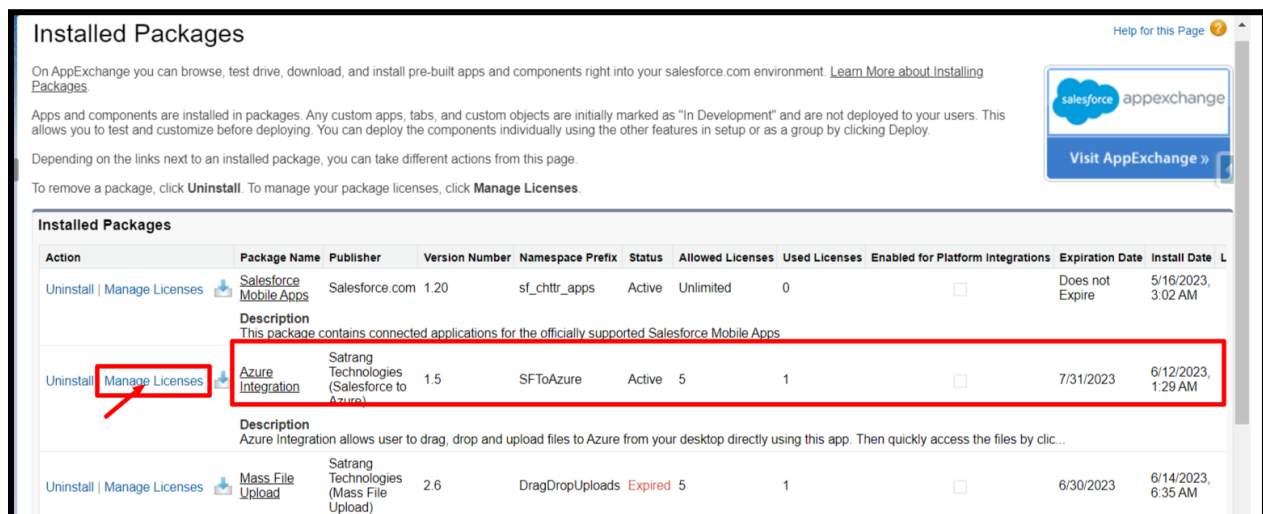
In Classic

Below are the steps to assign app licenses to the users:

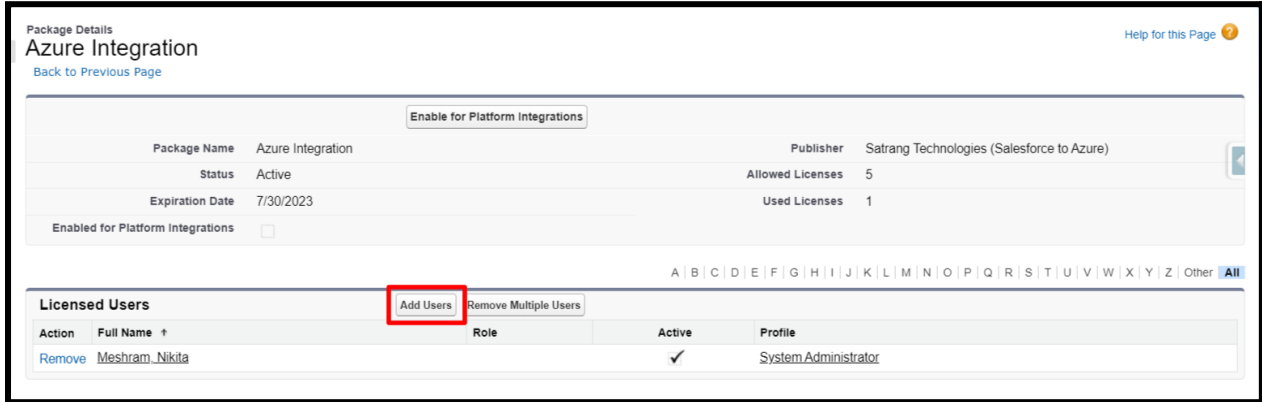
- Go to **Setup** and search for **Installed Packages** in Quick Find Box.



- Locate **Azure Integration** from the list of installed apps. Click on the **Manage Licenses** button present on the left of the app name as shown below.



- Now, click on the **Add Users** button



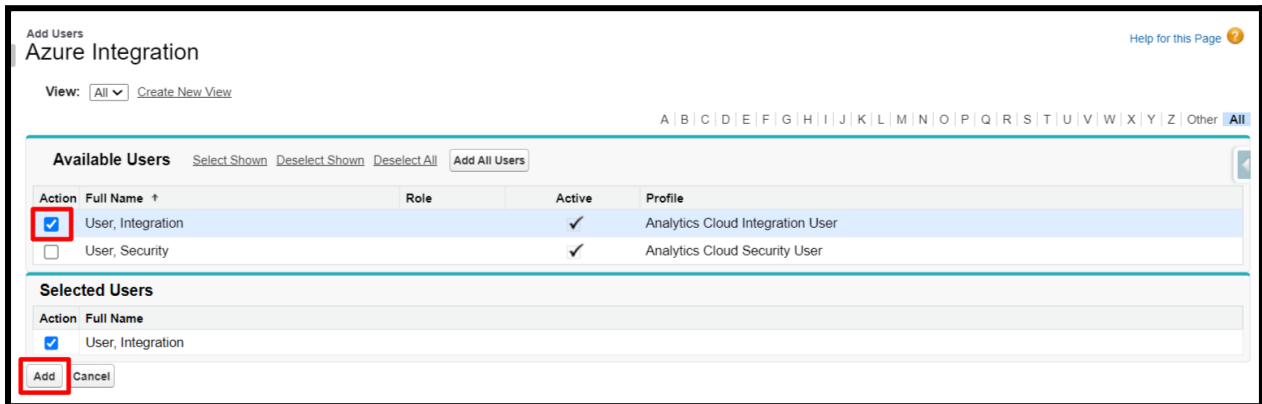
Package Details
Azure Integration
[Back to Previous Page](#) [Help for this Page](#)

Package Name	Azure Integration	Publisher	Satrag Technologies (Salesforce to Azure)
Status	Active	Allowed Licenses	5
Expiration Date	7/30/2023	Used Licenses	1
Enabled for Platform Integrations	☐		

Licensed Users

Action	Full Name	Role	Active	Profile
Remove	Meshrum, Nikita		✓	System Administrator

- Click on the checkbox next to the user's name to whom you want to assign the license, and click the **Add** button.



Add Users
Azure Integration
[View: All](#) [Create New View](#) [Help for this Page](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

Available Users

Action	Full Name	Role	Active	Profile
☒	User, Integration		✓	Analytics Cloud Integration User
☐	User, Security		✓	Analytics Cloud Security User

Selected Users

Action	Full Name
☒	User, Integration

- Now your users will be able to use the **Azure Integration** app.

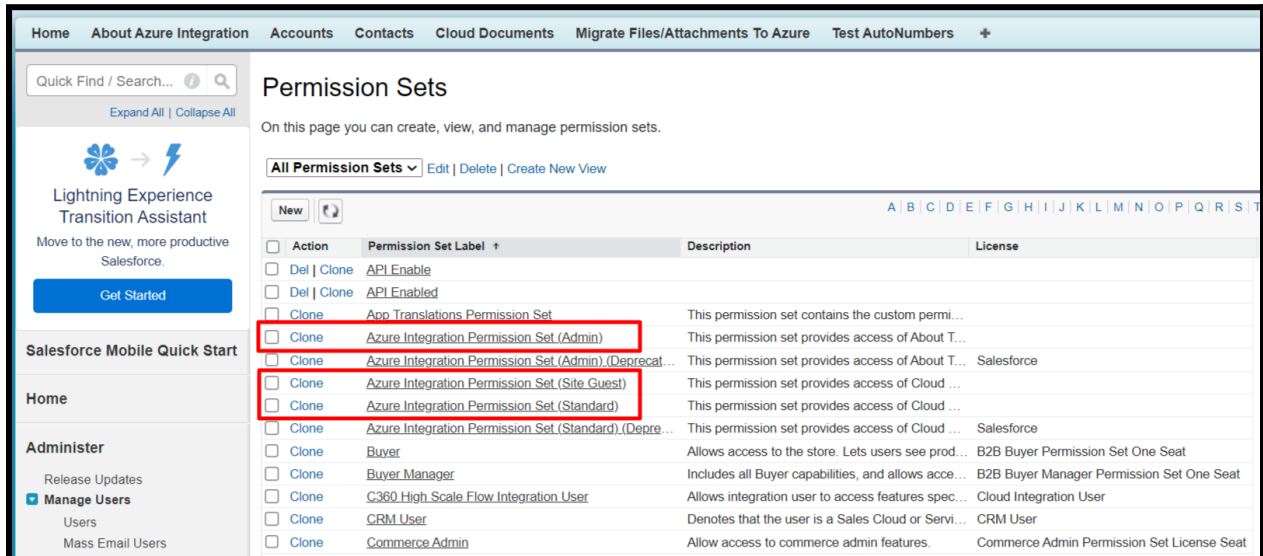
Permission Sets -

To assign permission sets to your users then go to the permission set and assign the permission set as per your requirement.

There are a total of 3 permission sets:

1. Azure Integration Permission Set (Admin) - To be assigned to admin users who need full access to the app.
2. Azure Integration Permission Set (Standard) - To be assigned to users who need access to upload, delete, download, and migrate features of the app.

3. Azure Integration Permission Set (Site Guest) - To be assigned to Site User so that the Azure to Salesforce feature can be used.



Home About Azure Integration Accounts Contacts Cloud Documents Migrate Files/Attachments To Azure Test AutoNumbers +

Quick Find / Search...

Expand All Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
[Get Started](#)

Salesforce Mobile Quick Start

Home

Administer
Release Updates
 Manage Users
Users
Mass Email Users

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets [Edit](#) [Delete](#) [Create New View](#)

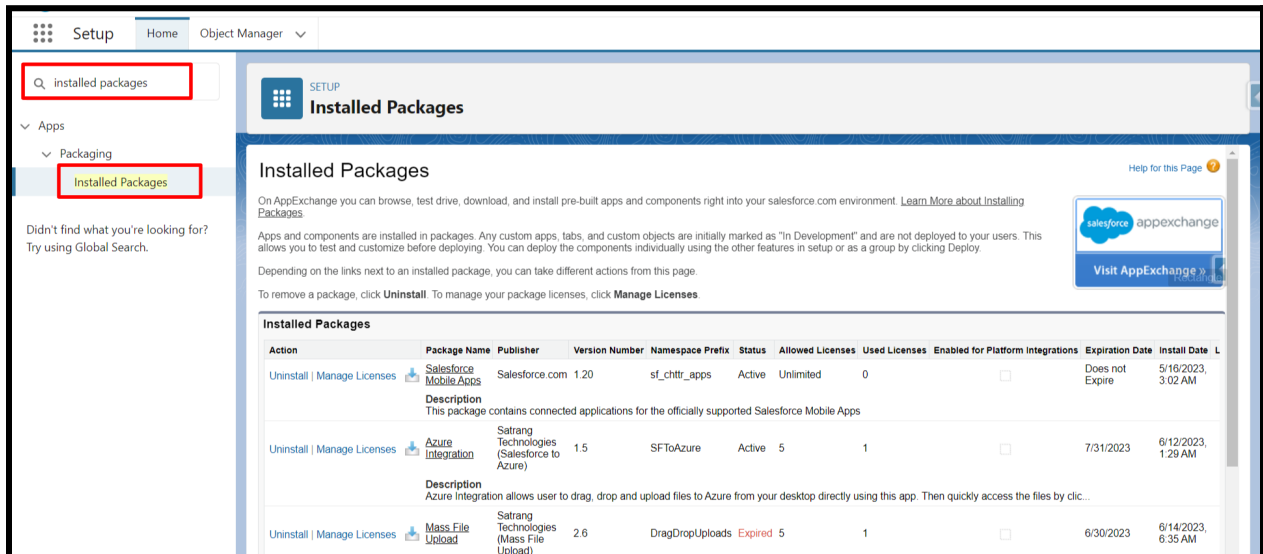
New

Action	Permission Set Label +	Description	License
Clone	API Enable		
Clone	API Enabled		
	App Translations Permission Set	This permission set contains the custom perm...	
	Azure Integration Permission Set (Admin)	This permission set provides access of About T...	
	Azure Integration Permission Set (Admin) (Deprecat...	This permission set provides access of About T...	Salesforce
	Azure Integration Permission Set (Site Guest)	This permission set provides access of Cloud ...	
	Azure Integration Permission Set (Standard)	This permission set provides access of Cloud ...	
	Azure Integration Permission Set (Standard) (Depre...	This permission set provides access of Cloud ...	Salesforce
	Buyer	Allows access to the store. Lets users see prod...	B2B Buyer Permission Set One Seat
	Buyer Manager	Includes all Buyer capabilities, and allows acce...	B2B Buyer Manager Permission Set One Seat
	C360 High Scale Flow Integration User	Allows integration user to access features spec...	Cloud Integration User
	CRM User	Denotes that the user is a Sales Cloud or Servi...	CRM User
	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat

In Lightning

Below are the steps to assign app licenses to the users:

- Go to **Setup** and search for **Installed Packages** in the Quick Find Box.



Setup Home Object Manager

Q installed packages

Apps
Packaging
Installed Packages

Didn't find what you're looking for?
Try using Global Search.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

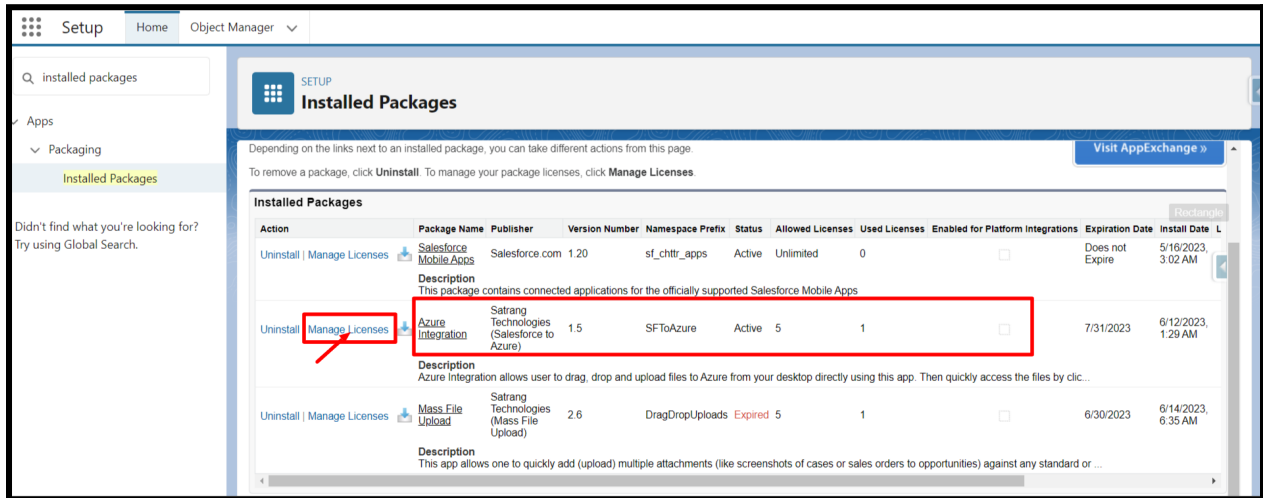
Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date
Uninstall Manage Licenses	Salesforce Mobile Apps	Salesforce.com	1.20	sf_chtr_apps	Active	Unlimited	0	☐	Does not Expire	5/16/2023, 3:02 AM
Description This package contains connected applications for the officially supported Salesforce Mobile Apps										
Uninstall Manage Licenses	Azure Integration	Satrag Technologies (Salesforce to Azure)	1.5	SFtoAzure	Active	5	1	☐	7/31/2023	6/12/2023, 1:29 AM
Description Azure Integration allows user to drag, drop and upload files to Azure from your desktop directly using this app. Then quickly access the files by clic...										
Uninstall Manage Licenses	Mass File Upload	Satrag Technologies (Mass File Upload)	2.6	DragDropUploads	Expired	5	1	☐	6/30/2023	6/14/2023, 6:35 AM

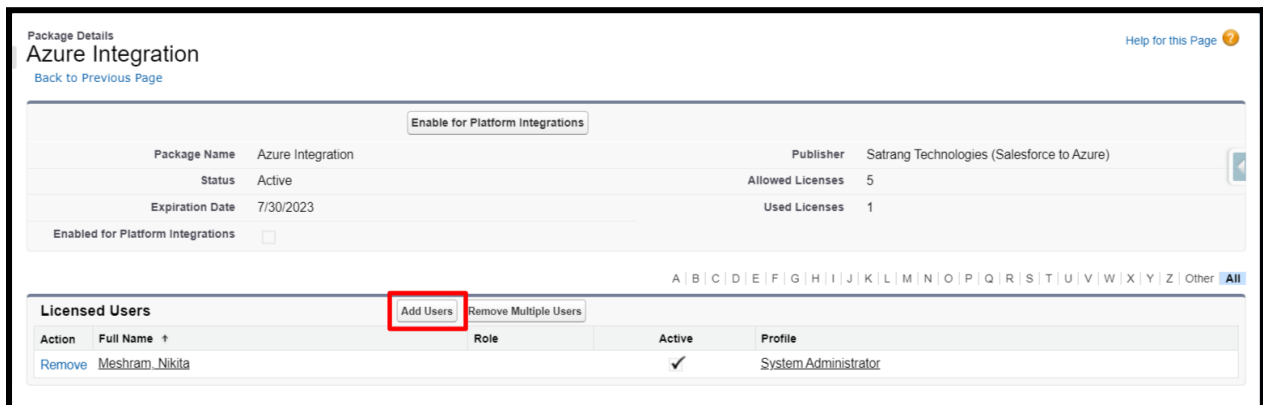
- Locate **Azure Integration** from the list of installed apps. Click on the **Manage Licenses** button present on the left of the app name.



The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'Apps', 'Packaging' is expanded, and 'Installed Packages' is selected. The main content area is titled 'Installed Packages'. It contains a table with columns: Action, Package Name, Publisher, Version Number, Namespace Prefix, Status, Allowed Licenses, Used Licenses, Enabled for Platform Integrations, Expiration Date, and Install Date. The 'Azure Integration' package is highlighted with a red box. To its left, the 'Manage Licenses' button is also highlighted with a red box and an arrow.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date
Uninstall Manage Licenses	Salesforce Mobile Apps	Salesforce.com	1.20	sf_chtr_apps	Active	Unlimited	0	☐	Does not Expire	5/16/2023, 3:02 AM
Uninstall Manage Licenses	Azure Integration	Satrag Technologies (Salesforce to Azure)	1.5	SFTtoAzure	Active	5	1	☐	7/31/2023	6/12/2023, 1:29 AM
Uninstall Manage Licenses	Mass File Upload	Satrag Technologies (Mass File Upload)	2.6	DragDropUploads	Expired	5	1	☐	6/30/2023	6/14/2023, 6:35 AM

- Now, click on the **Add Users** button

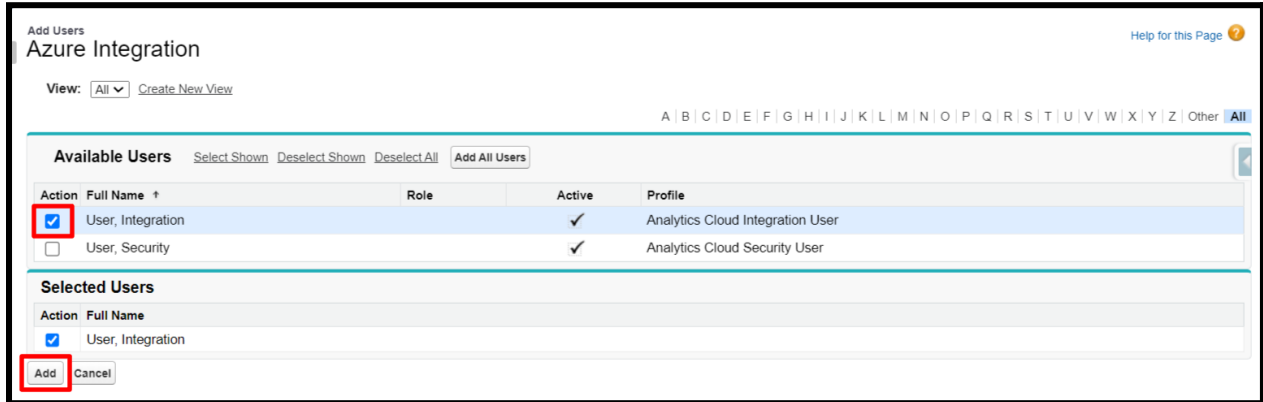


The screenshot shows the 'Package Details' page for 'Azure Integration'. The page includes a table with package information: Package Name (Azure Integration), Publisher (Satrag Technologies (Salesforce to Azure)), Status (Active), Allowed Licenses (5), Expiration Date (7/30/2023), and Used Licenses (1). Below this, there is a section for 'Licensed Users'. The 'Add Users' button is highlighted with a red box.

Package Name	Azure Integration	Publisher	Satrag Technologies (Salesforce to Azure)
Status	Active	Allowed Licenses	5
Expiration Date	7/30/2023	Used Licenses	1

Licensed Users				
Action	Full Name ↑	Role	Active	Profile
Remove	Meshram, Nikita		☒	System Administrator

- Click on the checkbox next to the user's name to whom you want to assign a license, and click the **Add button**.



Add Users
Azure Integration

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Available Users [Select Shown](#) [Deselect Shown](#) [Deselect All](#) [Add All Users](#)

Action	Full Name	Role	Active	Profile
☒	User, Integration		✓	Analytics Cloud Integration User
☐	User, Security		✓	Analytics Cloud Security User

Selected Users

Action	Full Name
☒	User, Integration

[Add](#) [Cancel](#)

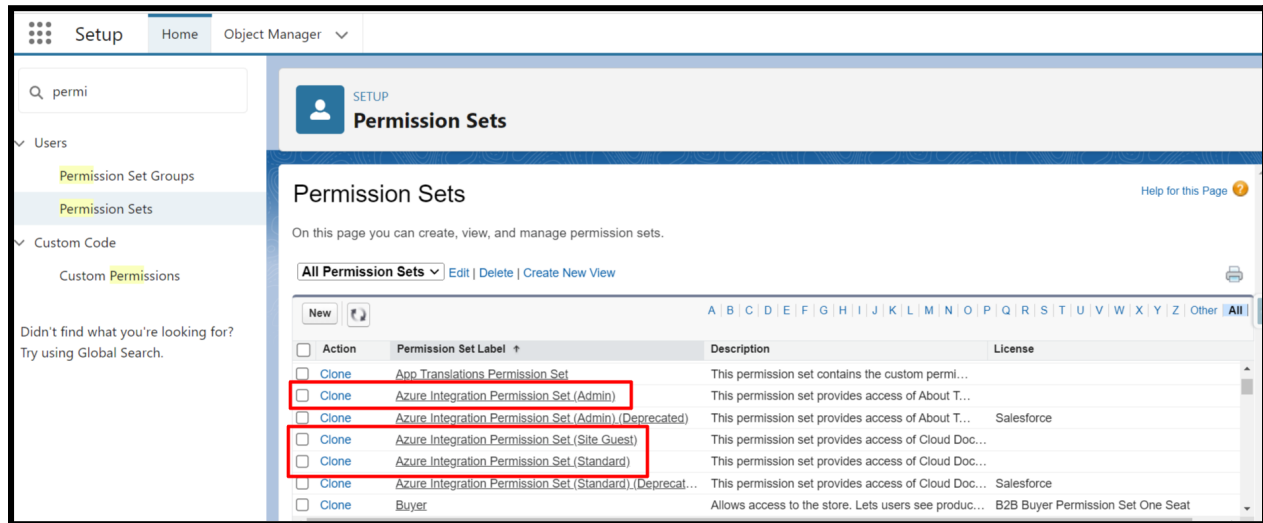
- Now your users will be able to use the **Azure Integration** app.

Permission Sets -

To assign permission sets to your users then go to the permission set and assign the permission set as per your requirement.

There are a total of 3 permission sets:

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3. Azure Integration Permission Set (Site Guest) - To be assigned to Site User so that the Azure to Salesforce feature can be used.

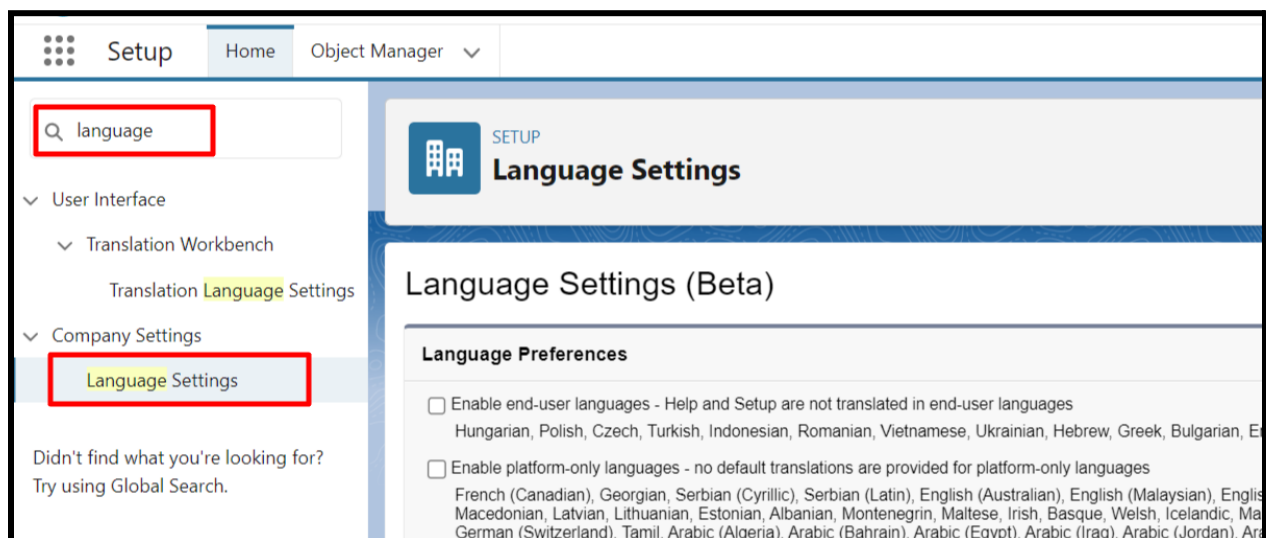


Language Settings

You have to check if all languages are available in the **Displayed Language** list; if not, then add them to the Displayed Language List.

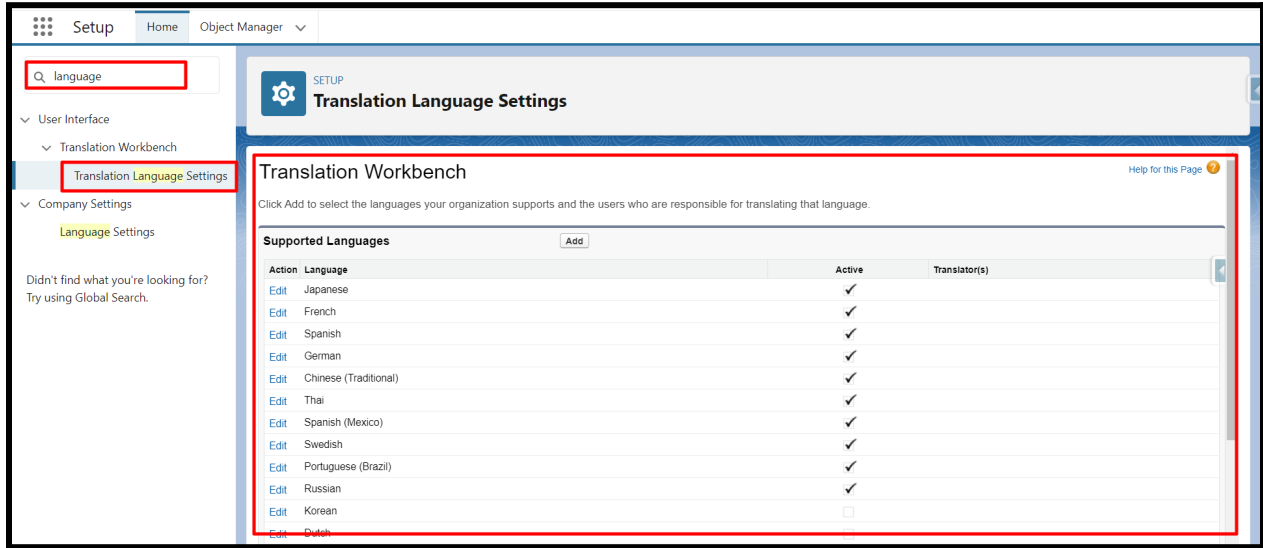
Follow the steps below -

- Go to the Setup and search for **Language Settings**



- Now, add all languages from **Available Languages** to the **Displayed Languages** list and hit **Save** as shown below.





Setup Home Object Manager

Q. language

User Interface

Translation Workbench

Translation Language Settings

Company Settings

Language Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Translation Language Settings

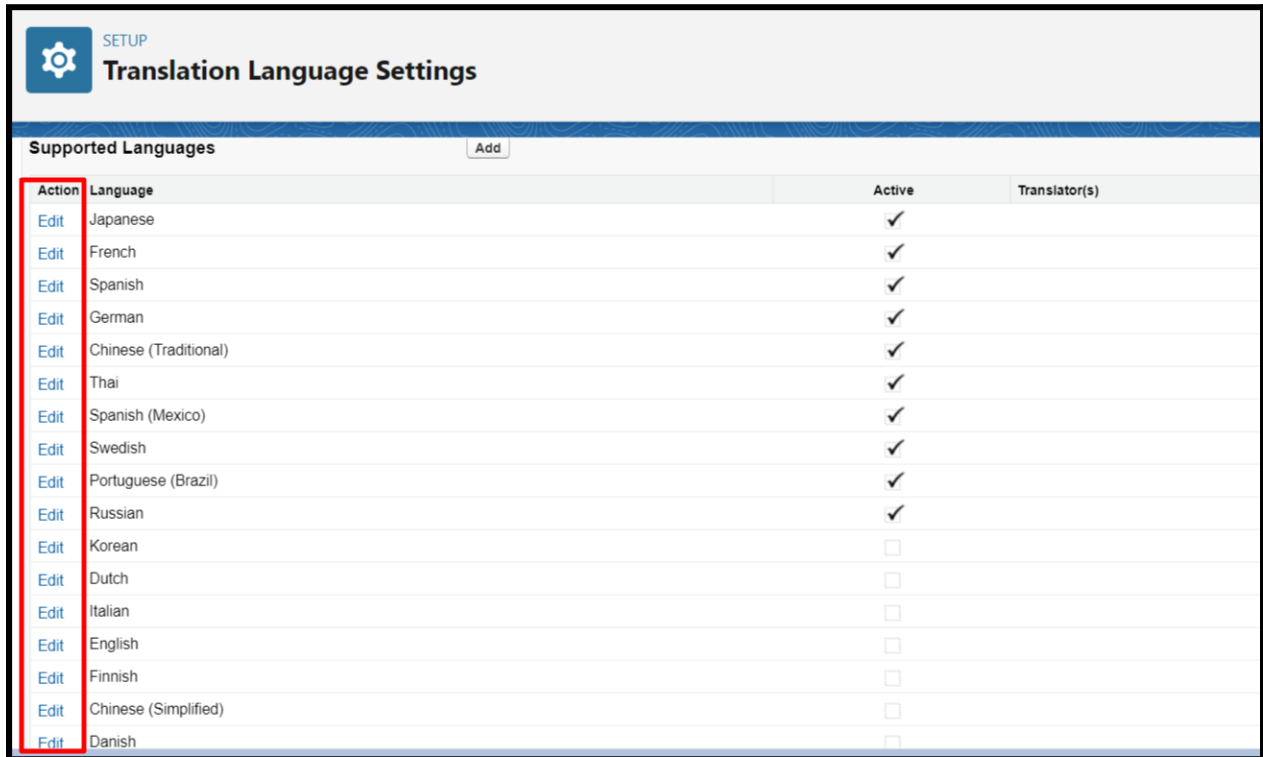
Translation Workbench

Click Add to select the languages your organization supports and the users who are responsible for translating that language.

Supported Languages Add

Action	Language	Active	Translator(s)
Edit	Japanese	✓	
Edit	French	✓	
Edit	Spanish	✓	
Edit	German	✓	
Edit	Chinese (Traditional)	✓	
Edit	Thai	✓	
Edit	Spanish (Mexico)	✓	
Edit	Swedish	✓	
Edit	Portuguese (Brazil)	✓	
Edit	Russian	✓	
Edit	Korean	☐	
Edit	Dutch	☐	

- Click on the **Edit** button to activate languages

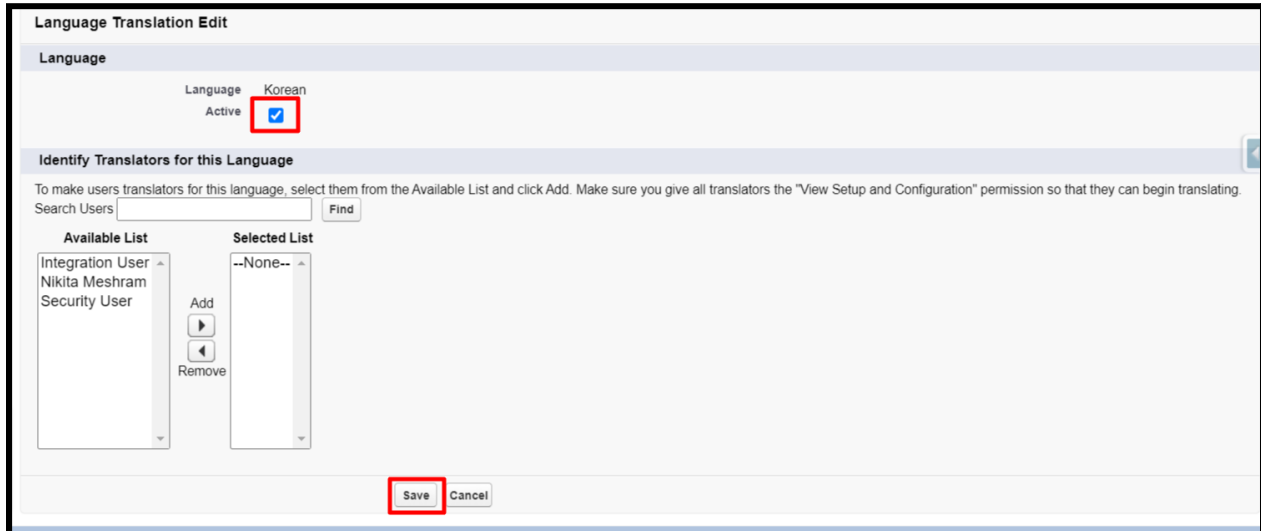


SETUP Translation Language Settings

Supported Languages Add

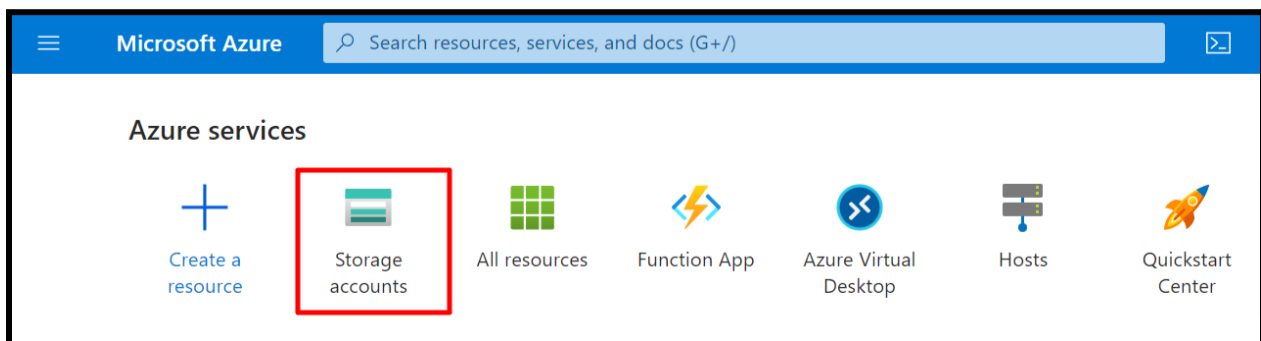
Action	Language	Active	Translator(s)
Edit	Japanese	✓	
Edit	French	✓	
Edit	Spanish	✓	
Edit	German	✓	
Edit	Chinese (Traditional)	✓	
Edit	Thai	✓	
Edit	Spanish (Mexico)	✓	
Edit	Swedish	✓	
Edit	Portuguese (Brazil)	✓	
Edit	Russian	✓	
Edit	Korean	☐	
Edit	Dutch	☐	
Edit	Italian	☐	
Edit	English	☐	
Edit	Finnish	☐	
Edit	Chinese (Simplified)	☐	
Edit	Danish	☐	

- Now select the **Active** checkbox and hit **Save**. (Follow the same steps for all languages)



Log in to the Azure Account

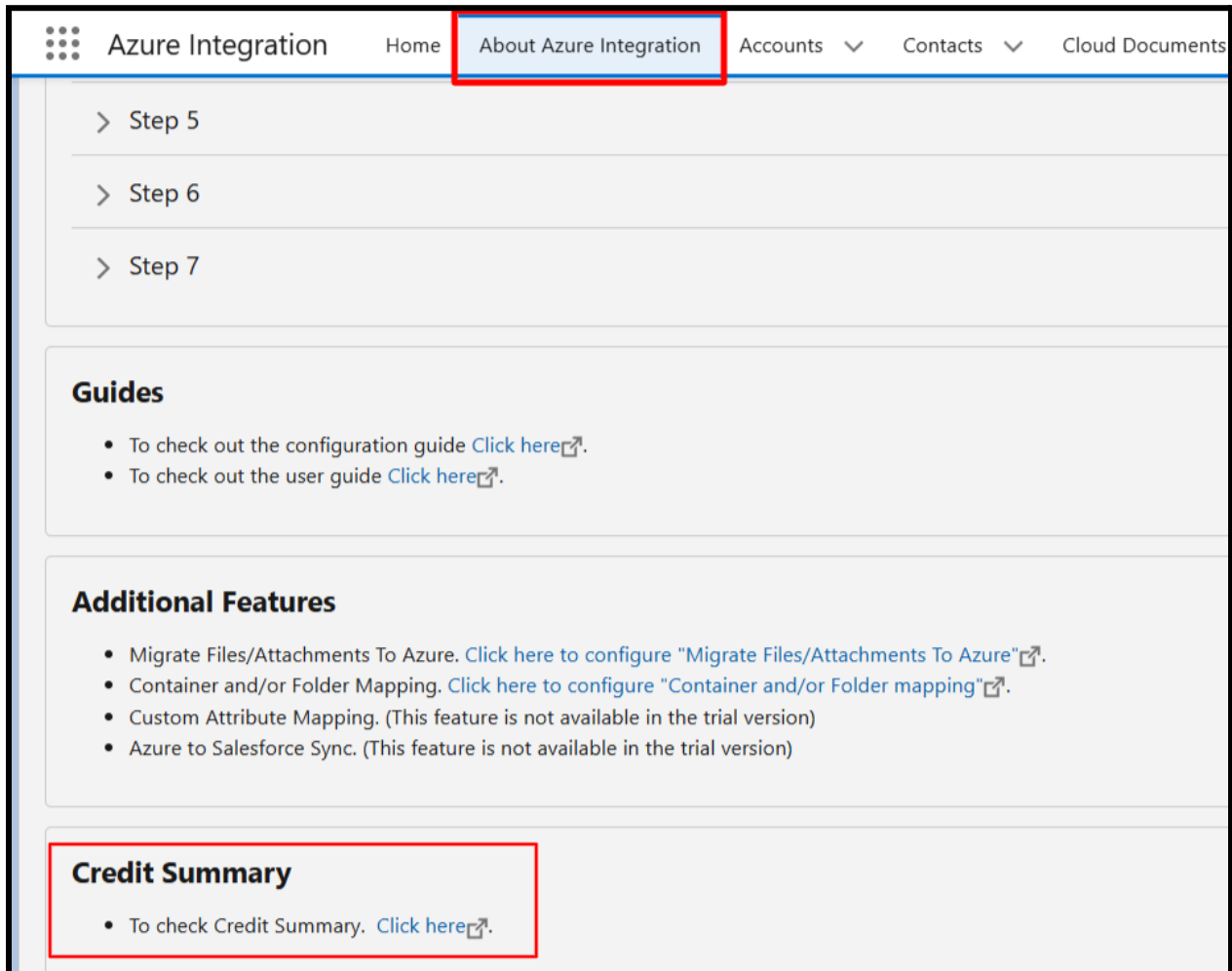
- Go to <https://azure.microsoft.com/en-in/get-started/azure-portal> and sign in to your Azure account.
- Navigate to the sign-in page, enter credentials, and log in to the Azure Account



- Set the Azure Storage Account Name and SAS Token, refer to [Step 4](#) (set an expiration date as per requirements)

About Azure Integration Tab

This tab contains all the configuration steps you need to follow to complete the setup. Additionally, we have mentioned all our additional features here. Overall, you can find the complete app details in this tab.



The screenshot displays the 'Azure Integration' tab in the application's navigation bar, which is highlighted with a red box. Below the navigation bar, the 'About Azure Integration' section is visible. It includes a list of steps (Step 5, Step 6, Step 7) and a 'Guides' section with links to configuration and user guides. The 'Additional Features' section lists various migration and mapping options, some of which are not available in the trial version. At the bottom, the 'Credit Summary' section is highlighted with a red box, providing a link to check the credit details.

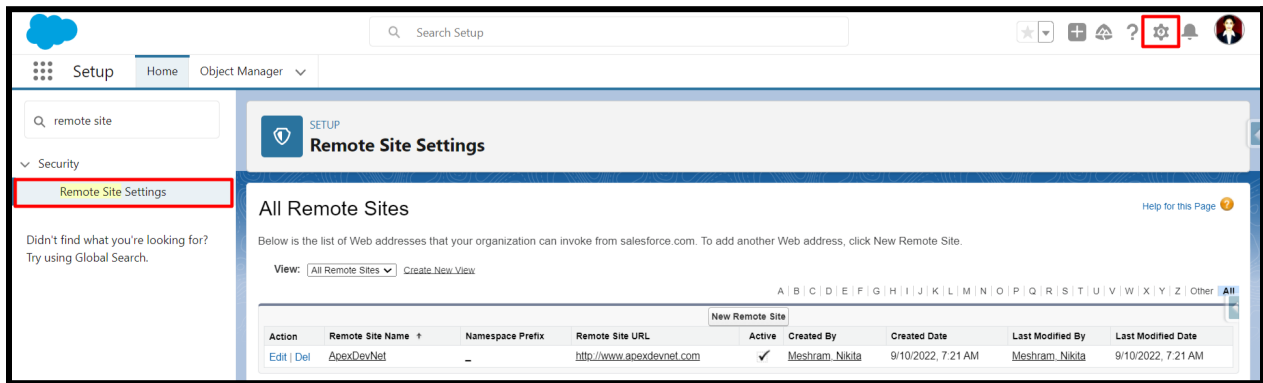
Credit Summary:

This section helps you with credit details for the migration page. It includes a summary of the credits purchased, used, and remaining. To check this, simply click on the Credit Summary URL, which will open in a new tab.

Credit Summary		
Attempted File Migrations	Successful File Migrations	Cancelled/Error File Migrations
97068 (3.97 MB)	202 (3.84 MB)	94358
Credits Assigned	Credits Consumed	Credits Left
1000.00 GB	3.84 MB	1000.00 GB

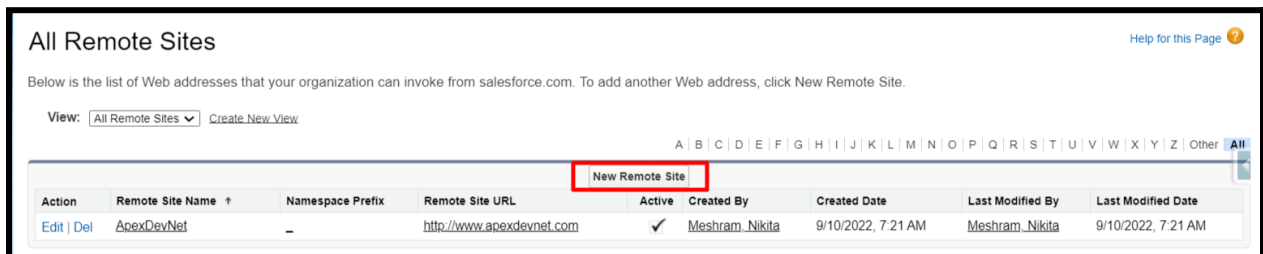
Step 1

- Go to the **Setup** and search **Remote Site Settings** in the quick find box.



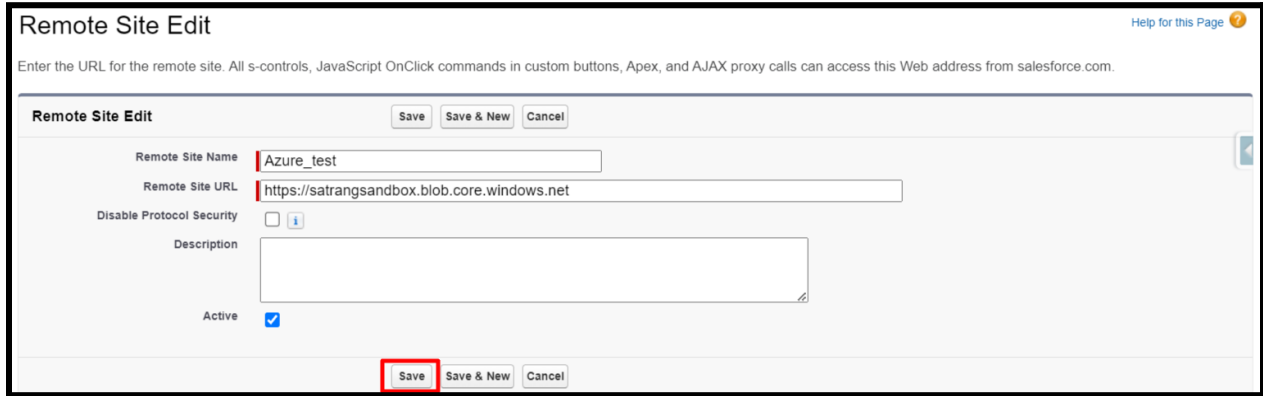
The screenshot shows the Salesforce Setup interface. In the left sidebar, under the 'Security' section, 'Remote Site Settings' is highlighted with a red box. The main content area is titled 'Remote Site Settings' and shows a table of 'All Remote Sites'. A 'New Remote Site' button is highlighted with a red box in the top right of the table area.

- Click on **New Remote Site**



The screenshot shows the 'New Remote Site' form. The 'New Remote Site' button is highlighted with a red box. The form contains fields for 'Remote Site Name', 'Namespace Prefix', 'Remote Site URL', 'Active', 'Created By', 'Created Date', 'Last Modified By', and 'Last Modified Date'.

- Fill Details → **Remote Site Name** - Enter the name as per your requirement, and **Remote Site URL** - [https://\[StorageAccountName\].blob.core.windows.net](https://[StorageAccountName].blob.core.windows.net), then click on the **Save** Button.
(Refer to [Step 4](#) for StorageAccountName)



Remote Site Edit Help for this Page

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Edit Save Save & New Cancel

Remote Site Name:

Remote Site URL:

Disable Protocol Security: ☐ i

Description:

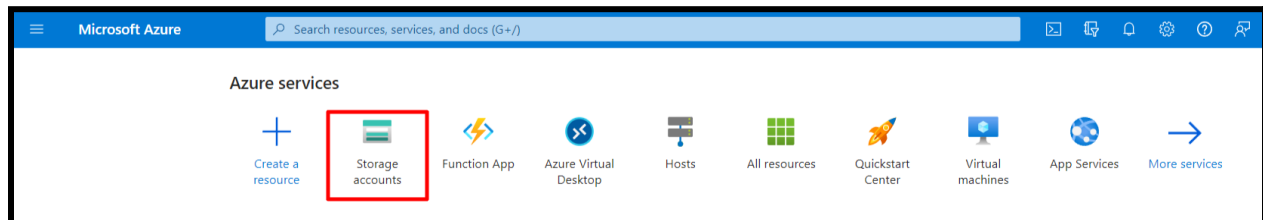
Active: ☒

Save Save & New Cancel

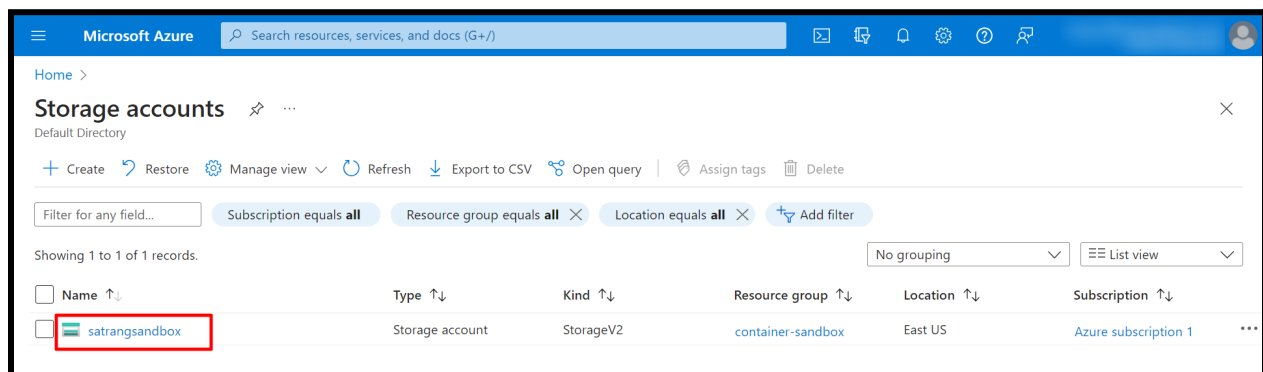
Step 2

In this step, you will need to set CORS in your Azure Storage Account

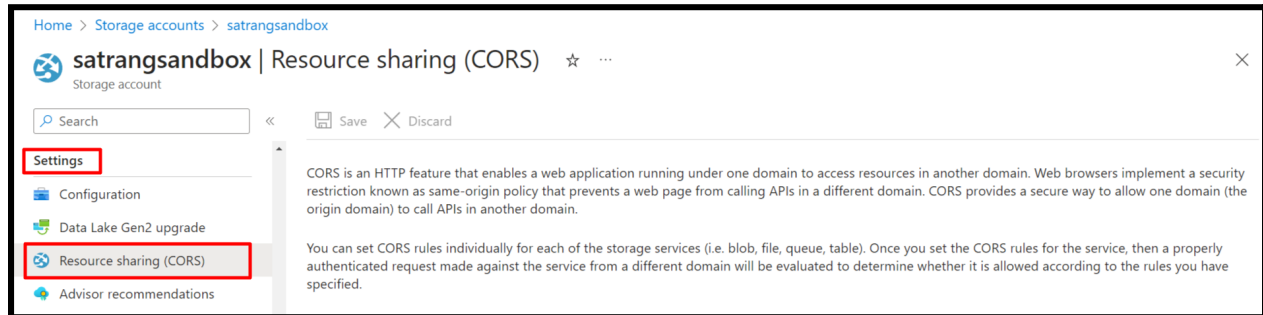
- Login to your Azure Account and click on **Storage Accounts**.



- Now, click on **Storage Account** as shown in the image below.



- Click on **Settings** —> Resource Sharing (CORS)



- In Allowed origins type "https://*.force.com", in Allowed methods select All methods, in Allowed headers enter *, in Exposed headers enter * and in Max age enter "10000".
- Again, in Allowed origins type "https://*.visualforce.com", in Allowed methods select All methods, in Allowed headers enter *, in Exposed headers enter * and in Max age enter "10000".

Blob service

File service

Queue service

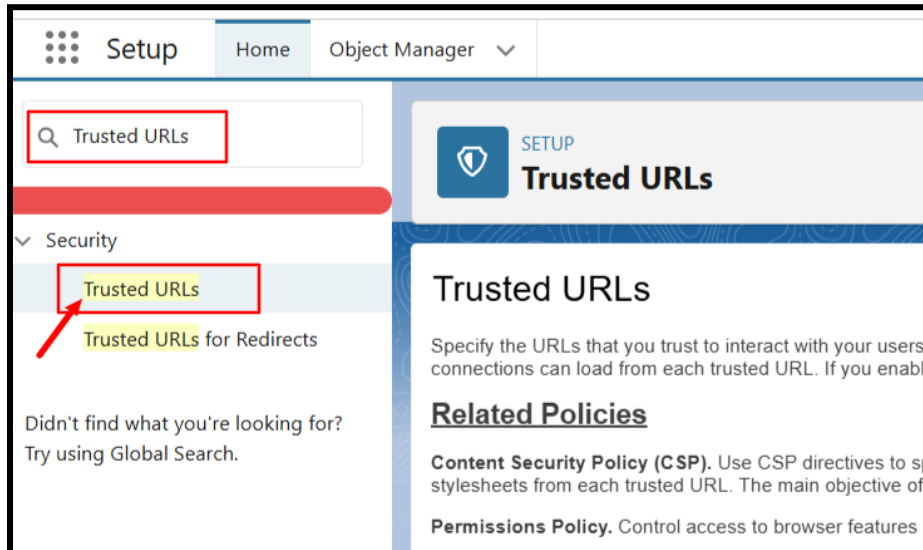
Table service

Allowed origins	Allowed methods	Allowed headers	Exposed headers	Max age	
https://*.force.com	GET,POST,PUT,PATCH,M...	*	*	10000	
https://*.visualforce.com	DELETE,GET,HEAD,MER...	*	*	10000	
	0 selected 			0	

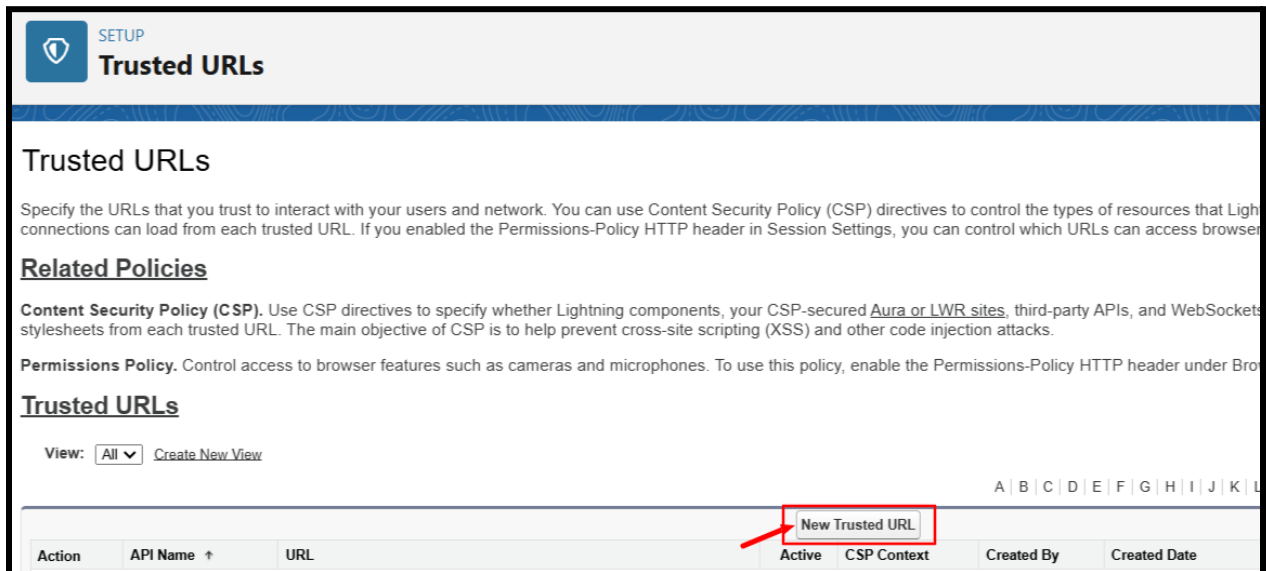
Step 3

In this step, you will need to set Content Security Policy Trusted Sites and enable Lightning Web Security.

- Go to Salesforce Org and open **Setup**. In the quick find box, search for Security —> **“Trusted URLs”**.

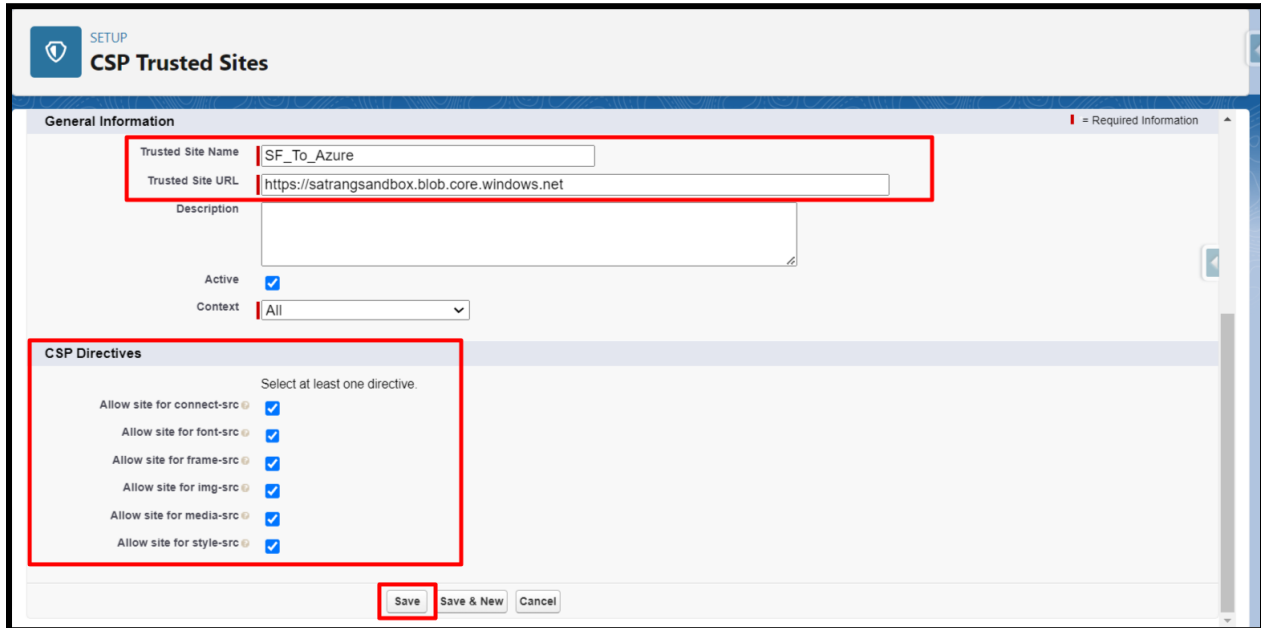


- Now, click on the **New Trusted URL**.



- Fill all details, **Trusted Site Name**, and **Trusted Site URL** with `StorageAccountName`, and check all the boxes under **CSP Directives**, and click save.

Note - Trusted Site URL should be the same URL that we entered in **Remote Site Settings Step 1** "[https://\[StorageAccountName\].blob.core.windows.net](https://[StorageAccountName].blob.core.windows.net)"



SETUP
CSP Trusted Sites

General Information

Trusted Site Name: SF_To_Azure

Trusted Site URL: https://satrangsandbox.blob.core.windows.net

Description:

Active: ☒

Context: All

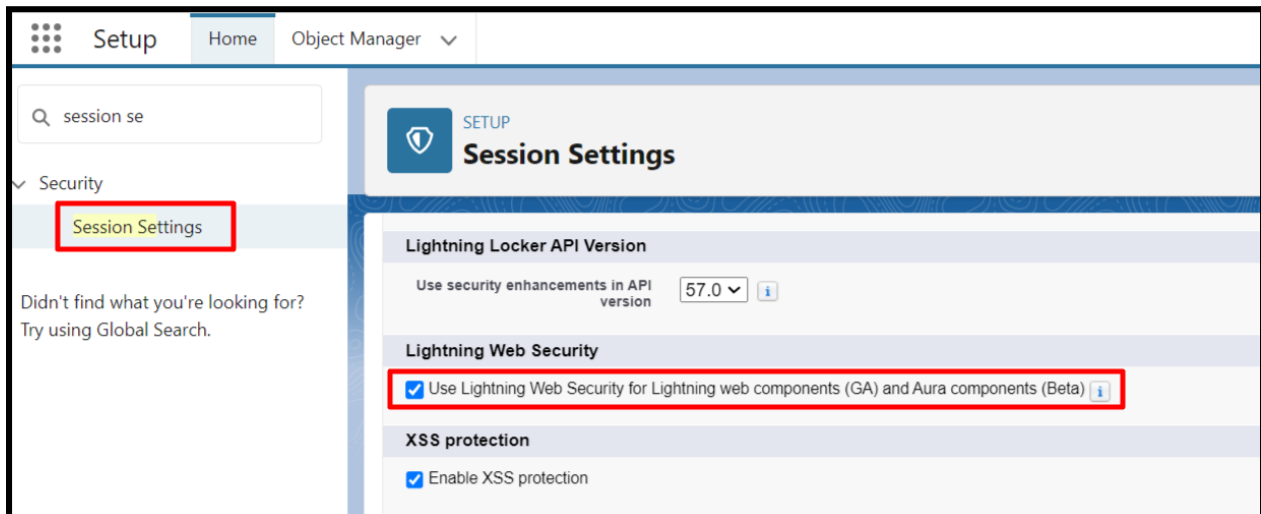
CSP Directives

Select at least one directive.

- Allow site for connect-src ☒
- Allow site for font-src ☒
- Allow site for frame-src ☒
- Allow site for img-src ☒
- Allow site for media-src ☒
- Allow site for style-src ☒

Save Save & New Cancel

- Again, go to Setup → **Session Settings** → Check the box in the **Lightning Web Security Section** → Use Lightning Web Security for Lightning web components (GA) and Aura components (Beta) and click on the **Save** Button.



Setup Home Object Manager

Search: session se

Security

Session Settings

Didn't find what you're looking for? Try using Global Search.

Session Settings

Lightning Locker API Version

Use security enhancements in API version: 57.0

Lightning Web Security

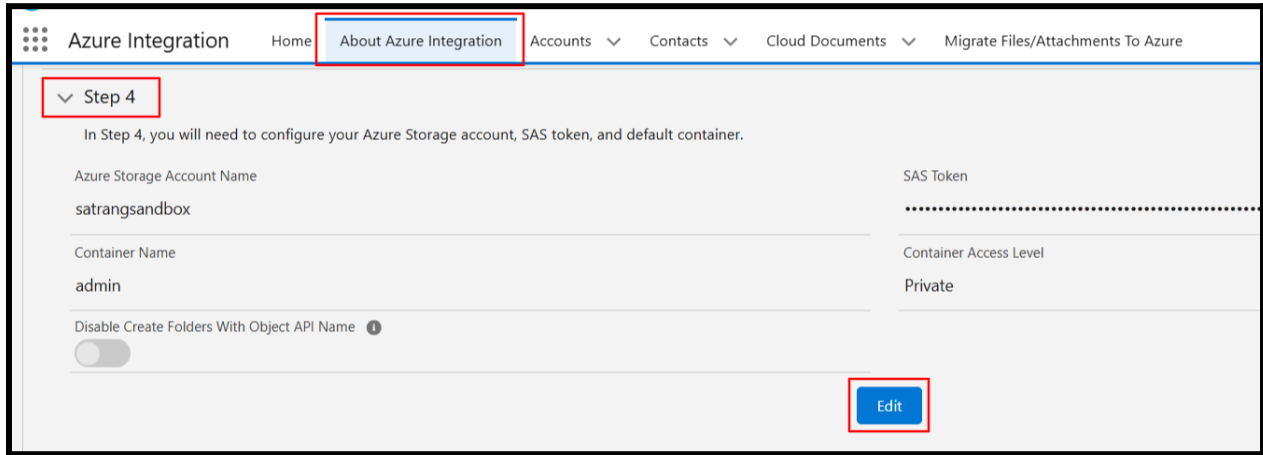
☒ Use Lightning Web Security for Lightning web components (GA) and Aura components (Beta)

XSS protection

☒ Enable XSS protection

Step 4

Click on **Step 4**, which is on the **About Azure Integration** tab, and click on the **Edit** Button, then follow the steps below:



Azure Integration Home **About Azure Integration** Accounts ▾ Contacts ▾ Cloud Documents ▾ Migrate Files/Attachments To Azure

▼ **Step 4**

In Step 4, you will need to configure your Azure Storage account, SAS token, and default container.

Azure Storage Account Name:

Container Name:

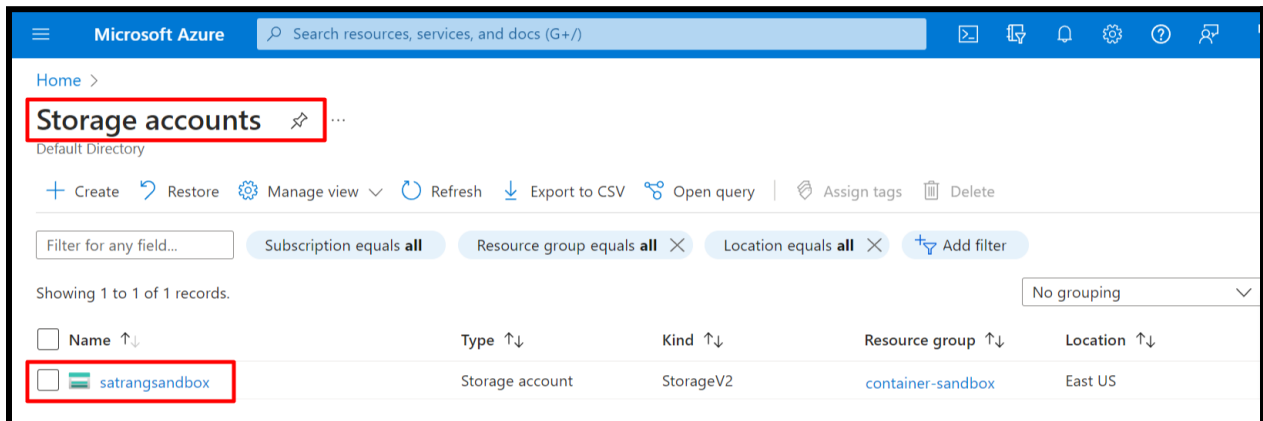
Disable Create Folders With Object API Name: ☐

SAS Token:

Container Access Level:

Edit

- **Add Azure Storage Account Name** → The Azure storage account name to which you want to upload files.



Microsoft Azure Search resources, services, and docs (G+)

Home > **Storage accounts** ...

Default Directory

+ Create Restore Manage view ▾ Refresh Export to CSV Open query Assign tags Delete

Filter for any field... Subscription equals all Resource group equals all × Location equals all × Add filter

Showing 1 to 1 of 1 records. No grouping ▾

☐ Name ↑↓	Type ↑↓	Kind ↑↓	Resource group ↑↓	Location ↑↓
☐  satrangsandbox	Storage account	StorageV2	container-sandbox	East US

- **SAS Token** → Go to your Azure Account → Click **Shared access signature** → Tick the checkboxes mentioned below:
 - Allowed Services - Blob
 - Allowed Resource Type - Service, Container, and Object
 - Allowed Permissions - Read, Write, Delete, and List
 - Start and expiry date/time - As per your requirement



Microsoft Azure Search resources, services, and docs (G+)

Home > Storage accounts > satrangsandbox

satrangsandbox Shared access signature ☆ ...

Storage account

Search

Give feedback

Security + networking

- Networking
- Front Door and CDN
- Access keys
- Shared access signature**
- Encryption
- Microsoft Defender for Cloud

Data management

- Redundancy
- Data protection
- Object replication
- Blob inventory

Allowed services ⓘ

☒ Blob ☐ File ☐ Queue ☐ Table

Allowed resource types ⓘ

☒ Service ☒ Container ☒ Object

Allowed permissions ⓘ

☒ Read ☒ Write ☒ Delete ☒ List ☐ Add ☐ Create ☐ Update ☐ Process ☐ Immutable storage ☐ Permanent delete

Blob versioning permissions ⓘ

☐ Enables deletion of versions

Allowed blob index permissions ⓘ

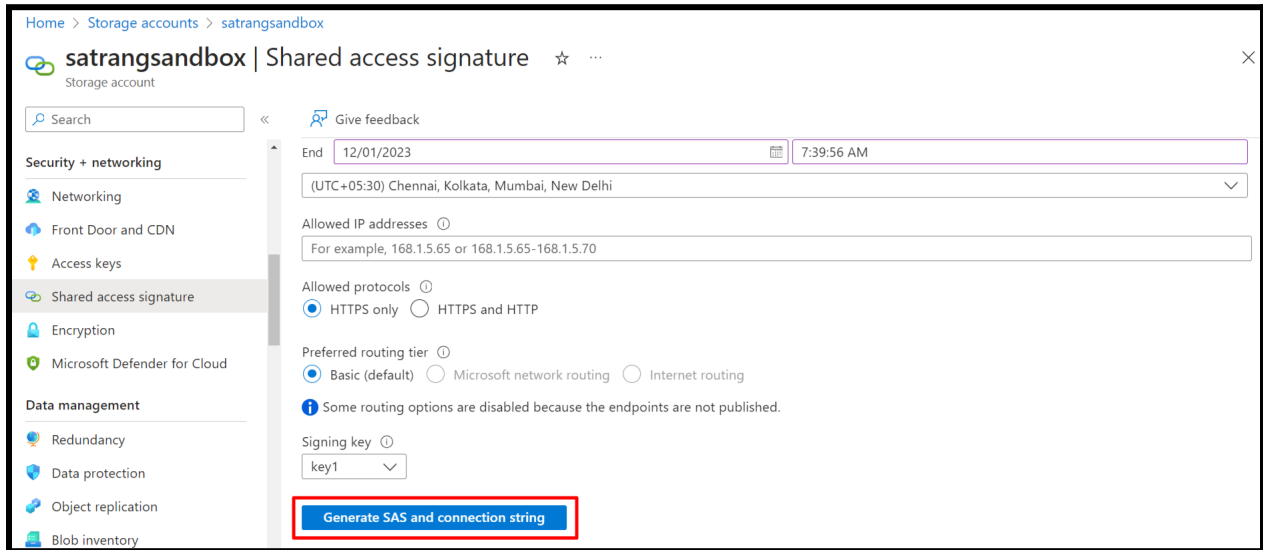
☐ Read/Write ☐ Filter

Start and expiry date/time ⓘ

Start 11/30/2023 11:39:56 PM

End 12/01/2023 7:39:56 AM

- Click on **Generate SAS and connection string**



Home > Storage accounts > satrangsandbox

satrangsandbox Shared access signature ☆ ...

Storage account

Search

Give feedback

Security + networking

- Networking
- Front Door and CDN
- Access keys
- Shared access signature**
- Encryption
- Microsoft Defender for Cloud

Data management

- Redundancy
- Data protection
- Object replication
- Blob inventory

End 12/01/2023 7:39:56 AM

(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Allowed IP addresses ⓘ

For example, 168.1.5.65 or 168.1.5.65-168.1.5.70

Allowed protocols ⓘ

☒ HTTPS only ☐ HTTPS and HTTP

Preferred routing tier ⓘ

☒ Basic (default) ☐ Microsoft network routing ☐ Internet routing

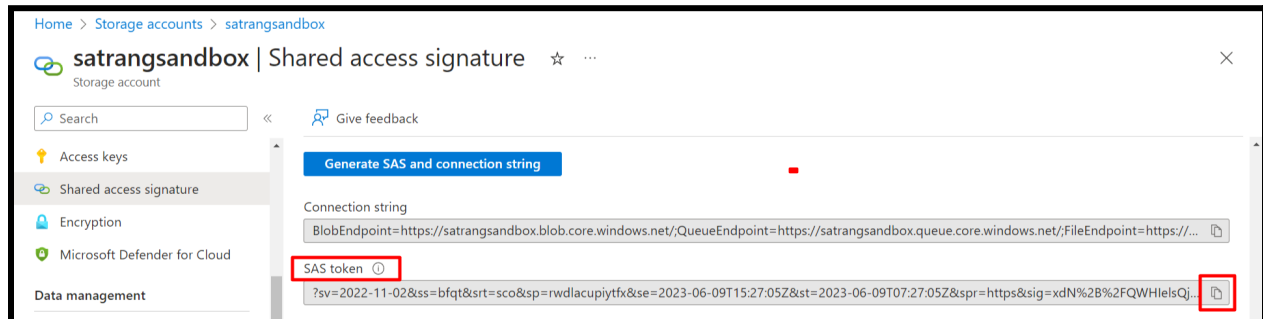
Some routing options are disabled because the endpoints are not published.

Signing key ⓘ

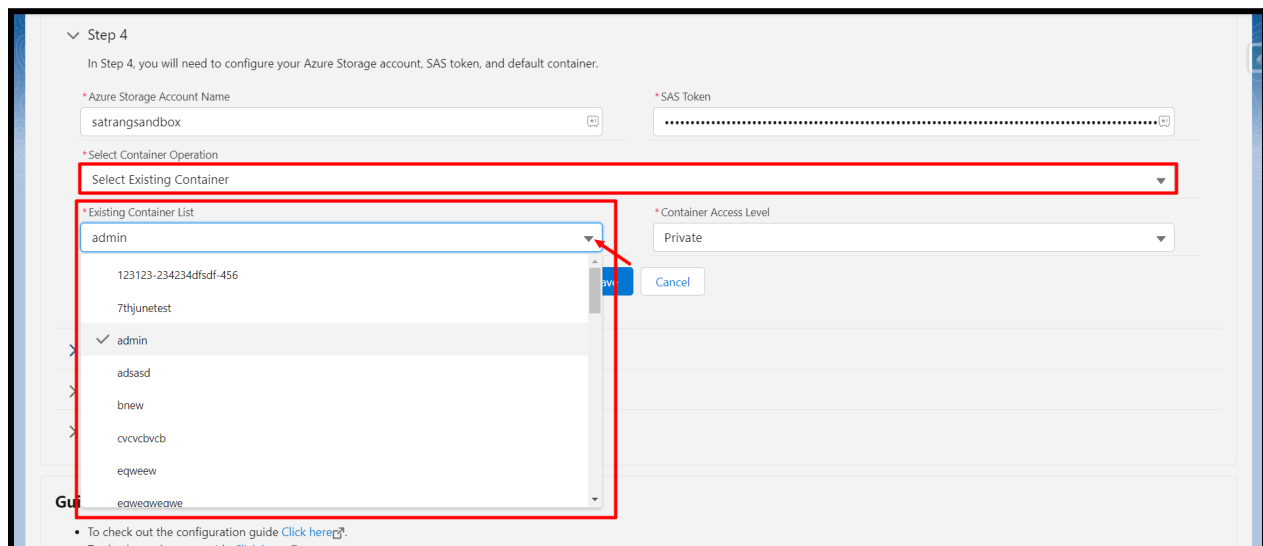
key1

Generate SAS and connection string

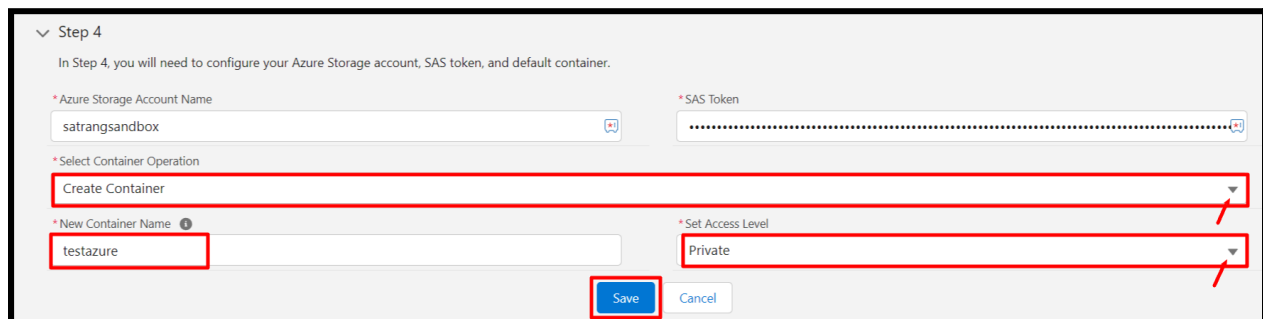
- Now, copy the text under the **SAS token**



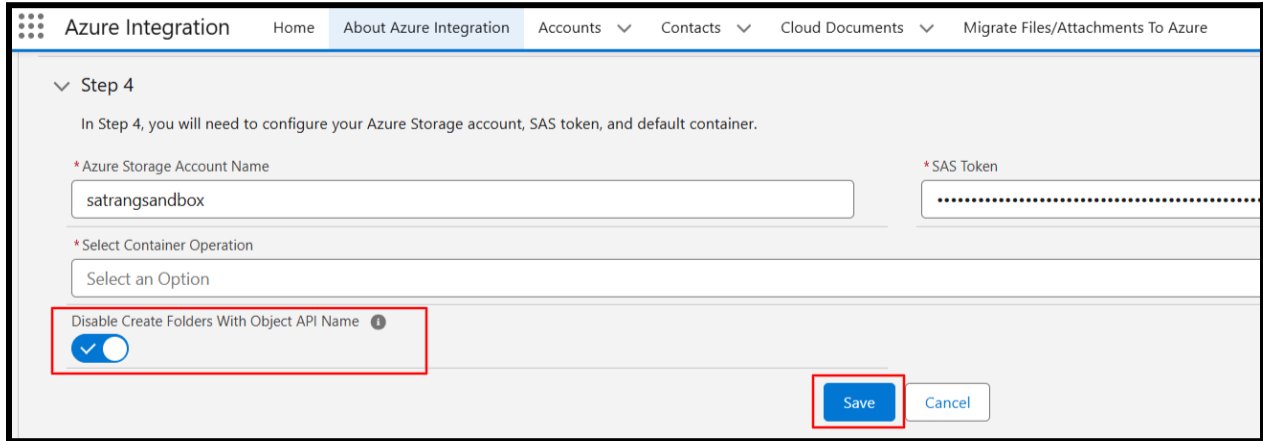
- Go back to **Step 4** and paste **SAS Token** and **Select Container Operation**. You can **Select Existing Container** and then select **Container Access Level** → Click on the **Save** button.



- Or you can create a new container as shown in the image below.



- **Disable Create Folders With Object API Name** - If this toggle is active, then the files uploaded from the Azure upload screen will NOT be uploaded under the Salesforce object's API name.



Azure Integration Home About Azure Integration Accounts Contacts Cloud Documents Migrate Files/Attachments To Azure

▼ Step 4

In Step 4, you will need to configure your Azure Storage account, SAS token, and default container.

* Azure Storage Account Name:

* SAS Token:

* Select Container Operation:

Disable Create Folders With Object API Name ☒

Save Cancel

Step 5

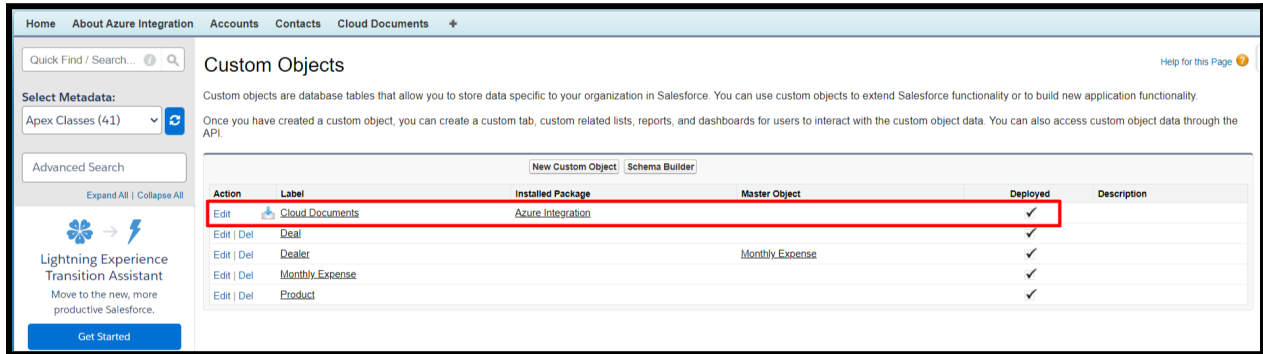
In this step, you will need to create a lookup field of the object, against which you want to upload the file, on the Cloud Document object. The same process will be followed for all standard or custom objects.

In Classic

- Go To Setup.



- Click on **Create** → **Objects** → **Cloud Documents**



Home About Azure Integration Accounts Contacts Cloud Documents +

Quick Find / Search...

Select Metadata:
Apex Classes (41)

Advanced Search

Expand All | Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started

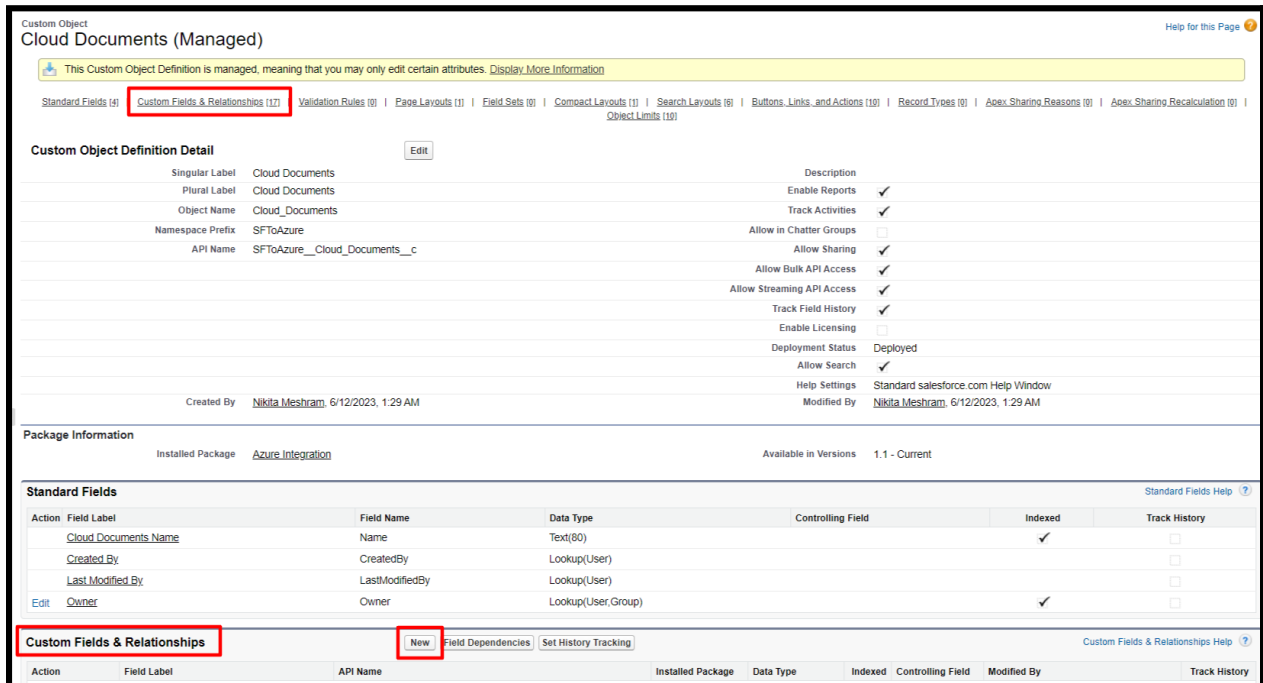
Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in Salesforce. You can use custom objects to extend Salesforce functionality or to build new application functionality. Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the API.

New Custom Object Schema Builder

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Cloud Documents	Azure Integration		✓	
Edit Del	Deal			✓	
Edit Del	Dealer		Monthly Expense	✓	
Edit Del	Monthly Expense			✓	
Edit Del	Product			✓	

- Click on the **New** Button (in the Custom Fields & Relationships section) and Enter details.



Custom Object
Cloud Documents (Managed)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Standard Fields (8) Custom Fields & Relationships (17) Validation Rules (0) Page Layouts (1) Field Sets (0) Compact Layouts (1) Search Layouts (0) Buttons, Links, and Actions (10) Record Types (0) Apex Sharing Reasons (0) Apex Sharing Recalculation (0) Object Limits (10)

Custom Object Definition Detail

Edit

Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
Cloud Documents Name	Name	Text(80)		✓	☐
Created By	CreatedBy	Lookup(User)			☐
Last Modified By	LastModifiedBy	Lookup(User)			☐
Owner	Owner	Lookup(User, Group)		✓	☐

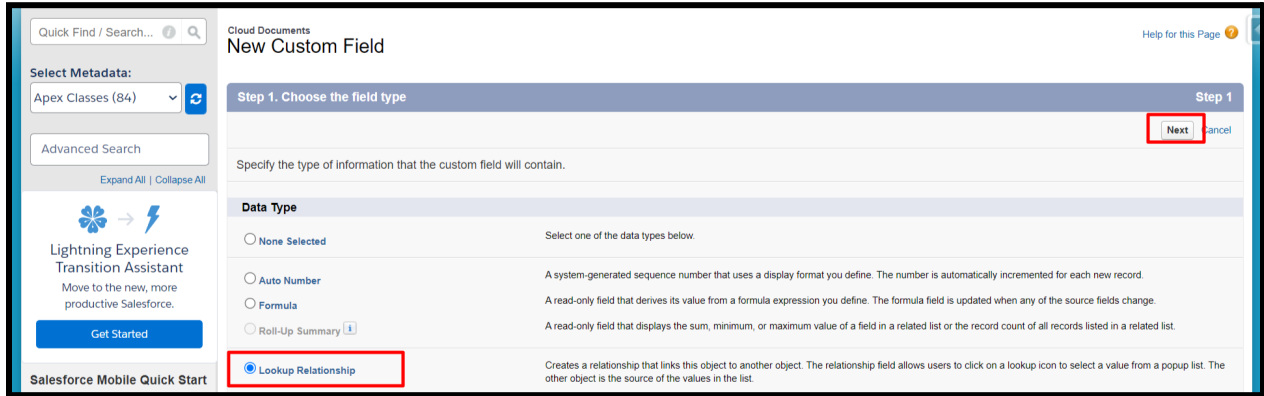
Custom Fields & Relationships

New Field Dependencies Set History Tracking

Custom Fields & Relationships Help

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Track History
	Cloud Documents Name	Name	Azure Integration	Text(80)	✓			☐
	Created By	CreatedBy	Azure Integration	Lookup(User)				☐
	Last Modified By	LastModifiedBy	Azure Integration	Lookup(User)				☐
	Owner	Owner	Azure Integration	Lookup(User, Group)	✓			☐

- Select **Lookup Relationship** data type and click on **Next**



Cloud Documents
New Custom Field

Quick Find / Search...

Select Metadata:
Apex Classes (84)

Advanced Search

Expand All | Collapse All

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Get Started

Salesforce Mobile Quick Start

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected

☐ Auto Number

☐ Formula

☐ Roll-Up Summary

☒ Lookup Relationship

Next

- Select **Account** on the **Related To** drop-down, then click **Next**.



Cloud Documents
New Relationship

Quick Find / Search...

Select Metadata:
Apex Classes (84)

Advanced Search

Expand All | Collapse All

Lightning Experience Transition Assistant

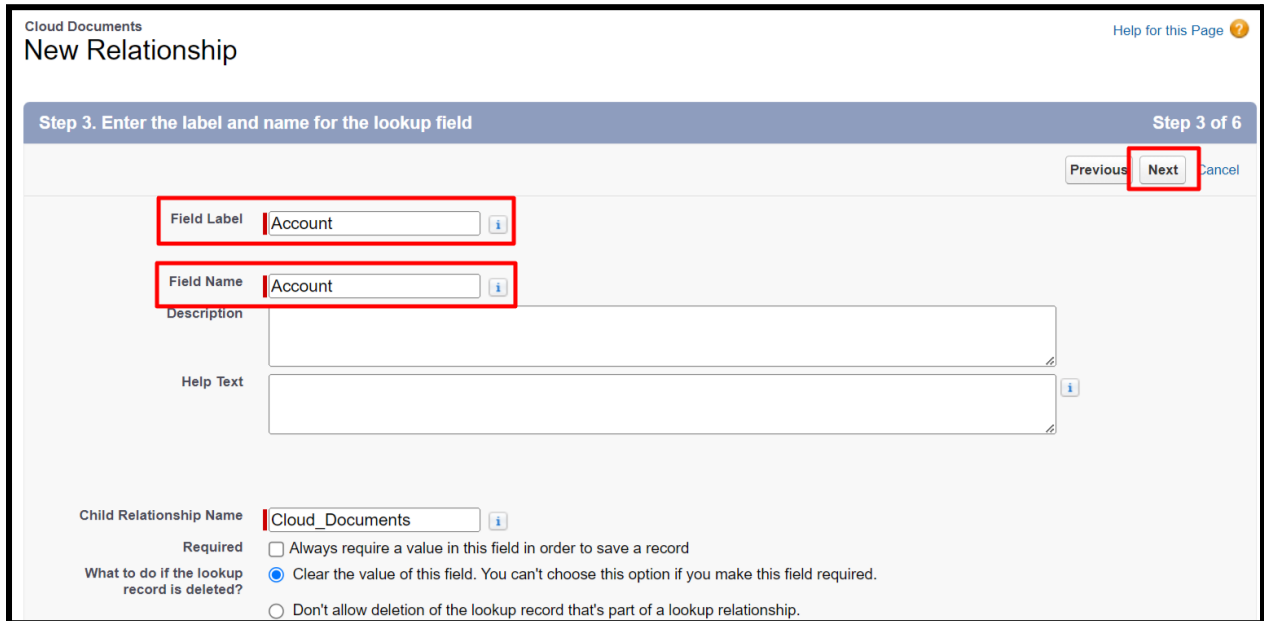
Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Account

Previous Next Cancel

- Field Label: Account (or the label you like).and Field Name: This field should auto-populate, click **Next**.



Cloud Documents
New Relationship

Quick Find / Search...

Select Metadata:
Apex Classes (84)

Advanced Search

Expand All | Collapse All

Lightning Experience Transition Assistant

Step 3. Enter the label and name for the lookup field

Field Label: Account

Field Name: Account

Description

Help Text

Child Relationship Name: Cloud_Documents

Required

What to do if the lookup record is deleted?

Previous Next Cancel

- Select Visible field level security for the reference field for necessary profiles, and click **Next**.

Cloud Documents
New Relationship

Step 4. Establish field-level security for reference field Step 4 of 6

Previous **Next** Cancel

Field Label Account
Data Type Lookup
Field Name Account
Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	☐ Visible	☐ Read-Only
Analytics Cloud Integration User	☒	☐
Analytics Cloud Security User	☒	☐
API Enable	☒	☐

- Add reference field to desired Page Layouts, click **Next**.

Cloud Documents
New Relationship

Step 5. Add reference field to Page Layouts Step 5 of 6

Previous **Next** Cancel

Field Label Account
Data Type Lookup
Field Name Account
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field	Page Layout Name
☒	Cloud Documents Layout

- Add custom-related lists to the desired Page Layouts and click **Save**.

Cloud Documents Help for this Page ?

New Relationship

Step 6. Add custom related lists Step 6 of 6

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label Account
Data Type Lookup
Field Name Account
Description

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List	Page Layout Name
☒	Account (Marketing) Layout
☒	Account (Sales) Layout
☒	Account (Support) Layout
☒	Account Layout

☒ Append related list to users' existing personal customizations

In Lightning

- Go to **Setup** → **Object Manager** → Select **Cloud Documents** → Click on **Fields & Relationships** → Click on the **New** button.

Setup Home **Object Manager**

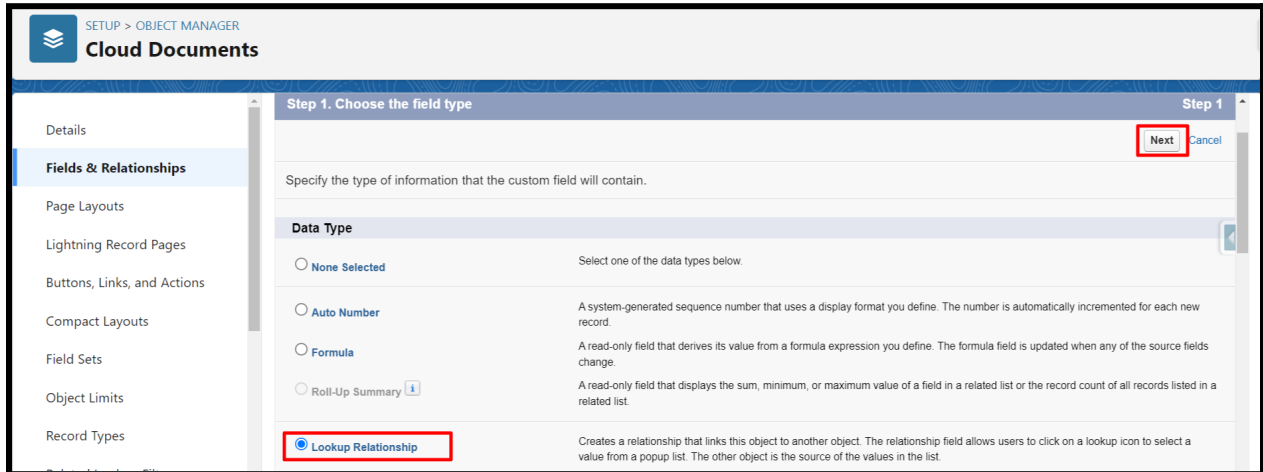
SETUP > OBJECT MANAGER
Cloud Documents

Details **Fields & Relationships** Quick Find [New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

21 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account__c	Lookup(Account)		✓
Attachment Id (Migration)	SFAzure_Attachment_Id_Migration__c	Text(255)		
Attachment Name (Migration)	SFAzure_Attachment_Name_Migration__c	Text(255)		

- Select the **Lookup Relationship** data type and click **Next**.



SETUP > OBJECT MANAGER
Cloud Documents

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

Step 1. Choose the field type Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected Select one of the data types below.

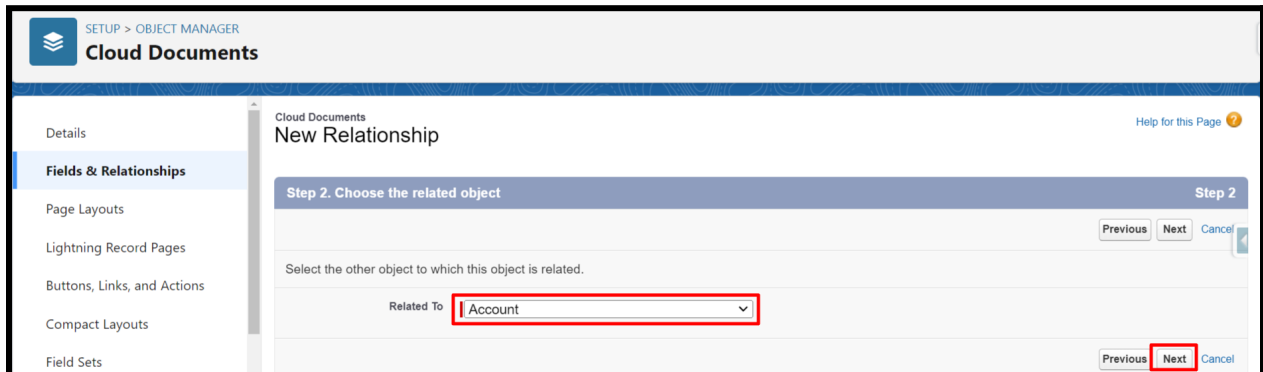
☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☒ **Lookup Relationship** Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

- Select **Related To Account**, and click **Next**. (You can select the object to which you want to create the relationship.)



SETUP > OBJECT MANAGER
Cloud Documents

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets

Cloud Documents
New Relationship Help for this Page

Step 2. Choose the related object Step 2

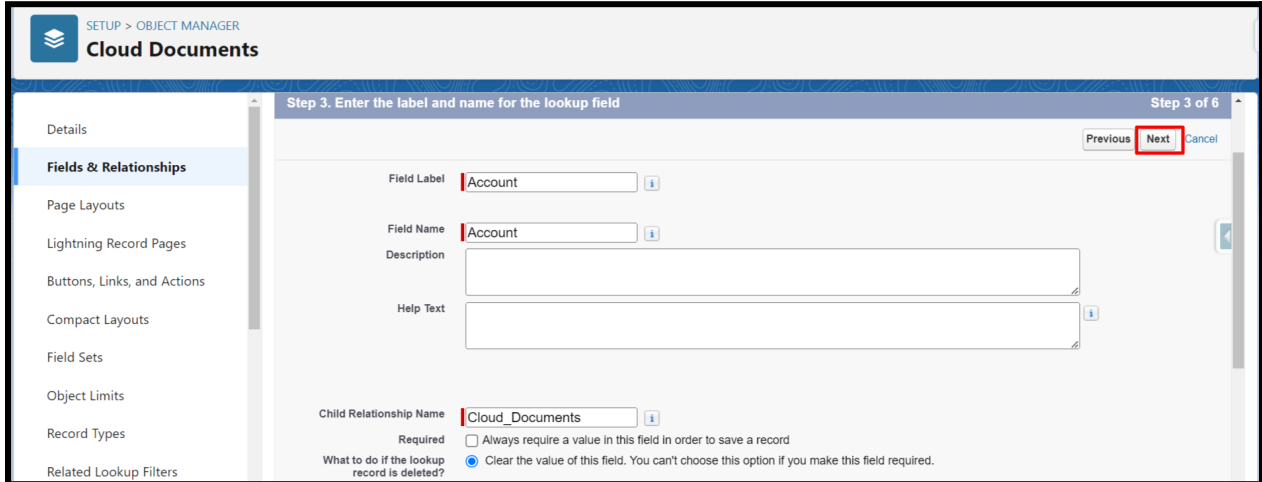
Previous Next Cancel

Select the other object to which this object is related.

Related To **Account**

Previous Next Cancel

- Field Label: Account (or the label you like) and Field Name: This field should auto-populate. Click **Next**.



SETUP > OBJECT MANAGER
Cloud Documents

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Step 3. Enter the label and name for the lookup field Step 3 of 6

Field Label

Field Name

Description

Help Text

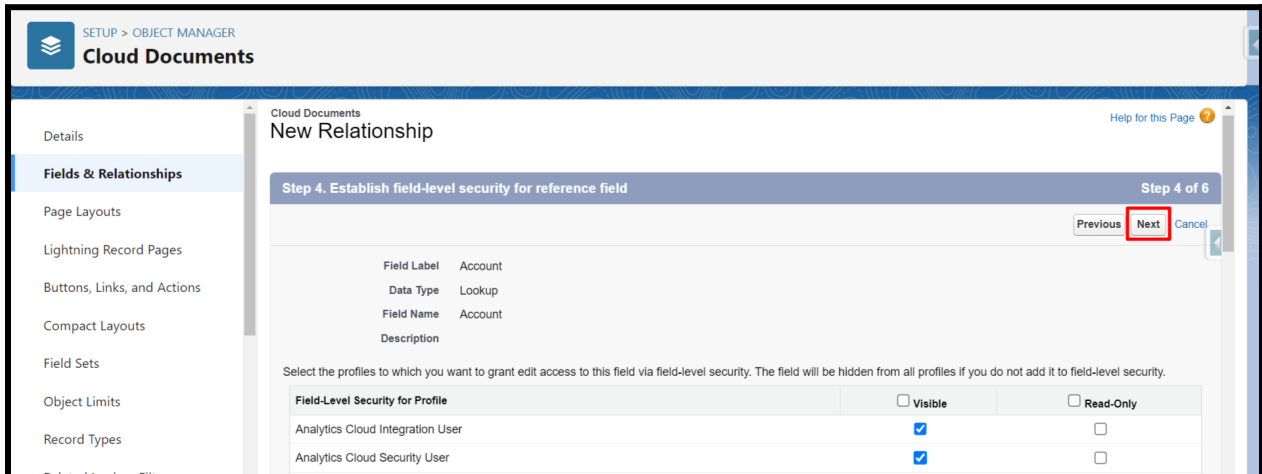
Child Relationship Name

Required ☐ Always require a value in this field in order to save a record

What to do if the lookup record is deleted? ☒ Clear the value of this field. You can't choose this option if you make this field required.

Previous **Next** Cancel

- Select Visible field level security for the reference field for the necessary profiles, and click **Next**.



SETUP > OBJECT MANAGER
Cloud Documents

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

Cloud Documents
New Relationship Help for this Page

Step 4. Establish field-level security for reference field Step 4 of 6

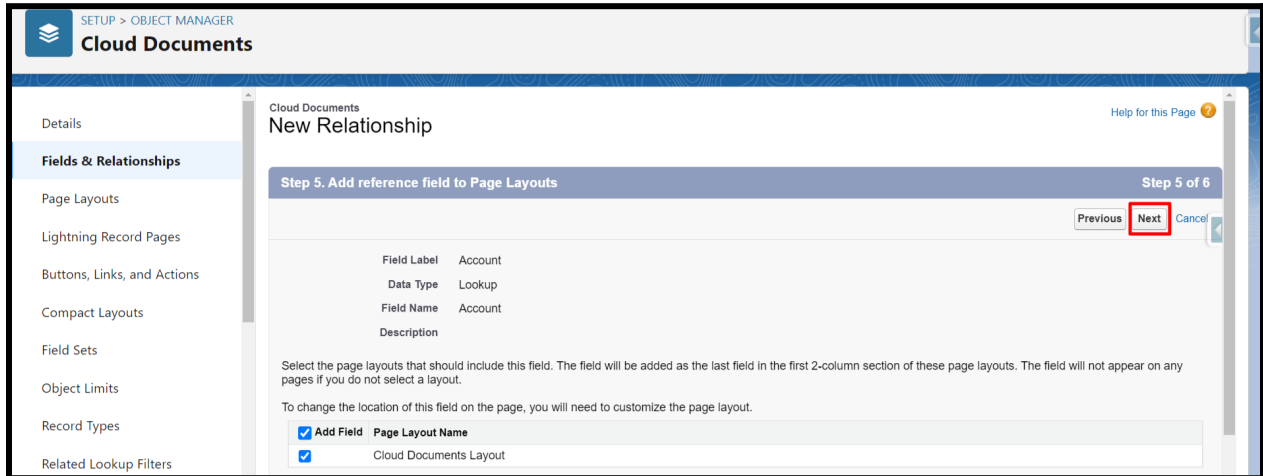
Field Label Account
Data Type Lookup
Field Name Account
Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	☐ Visible	☐ Read-Only
Analytics Cloud Integration User	☒	☐
Analytics Cloud Security User	☒	☐

Previous **Next** Cancel

- Add a reference field to your required Page Layouts, and click **Next**.



SETUP > OBJECT MANAGER
Cloud Documents

Cloud Documents
New Relationship

Step 5. Add reference field to Page Layouts

Field Label: Account
Data Type: Lookup
Field Name: Account
Description:

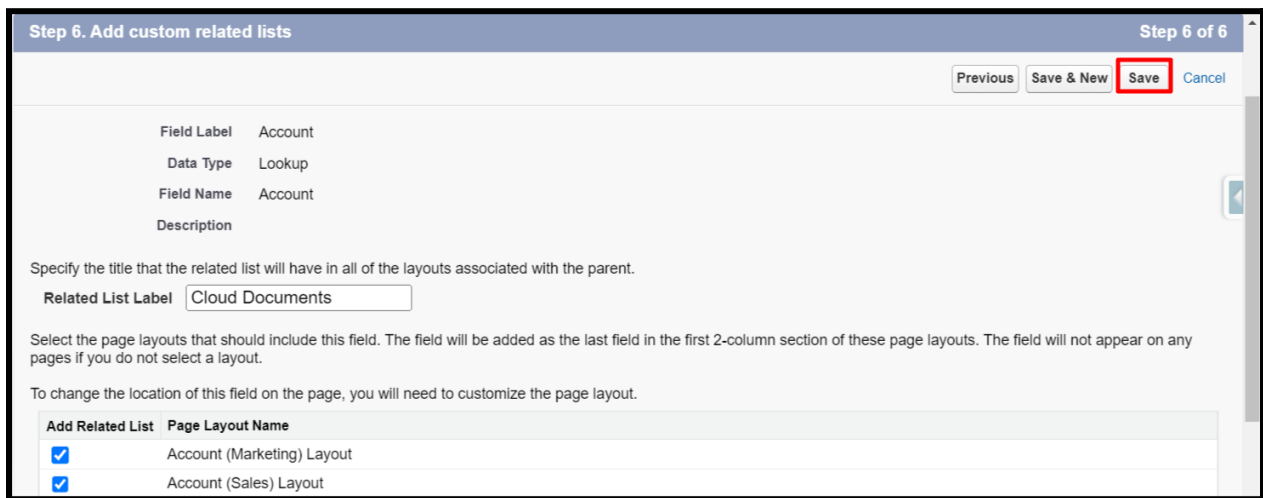
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field Page Layout Name

☒ Cloud Documents Layout

- Add custom-related lists to the desired Page Layouts and click **Save**.



Step 6. Add custom related lists

Field Label: Account
Data Type: Lookup
Field Name: Account
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label: Cloud Documents

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Related List Page Layout Name

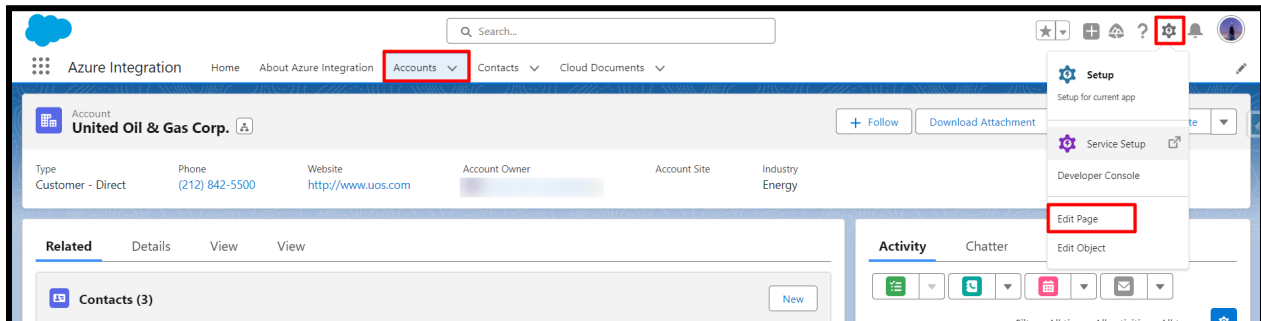
☒ Account (Marketing) Layout

☒ Account (Sales) Layout

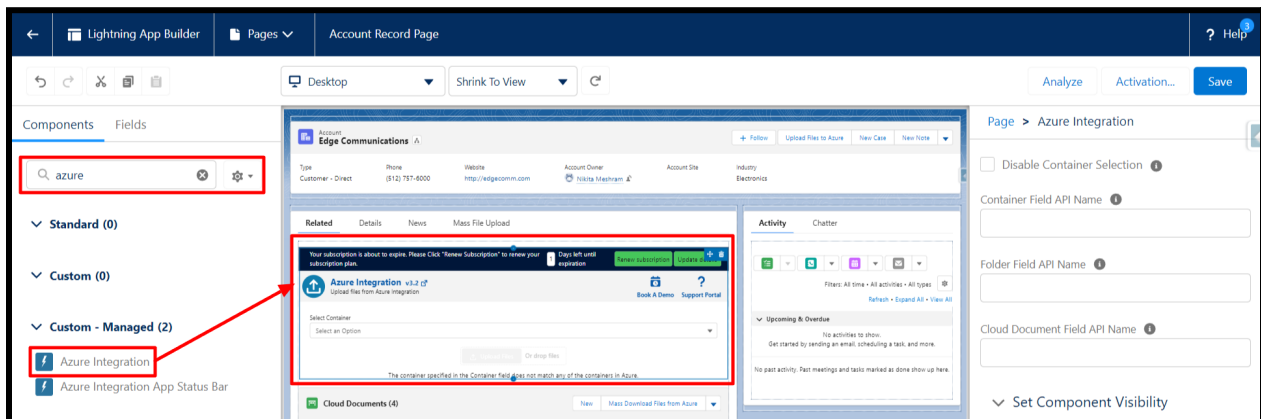
Step 6

This step will help you update the record's page by including the **Azure Integration** lightning web component in the record of the object against which you want to upload the files.

- Go to the Account Record (any of the records against which you want to upload the file), click on the **Gear icon** → **Edit Page** as shown below :



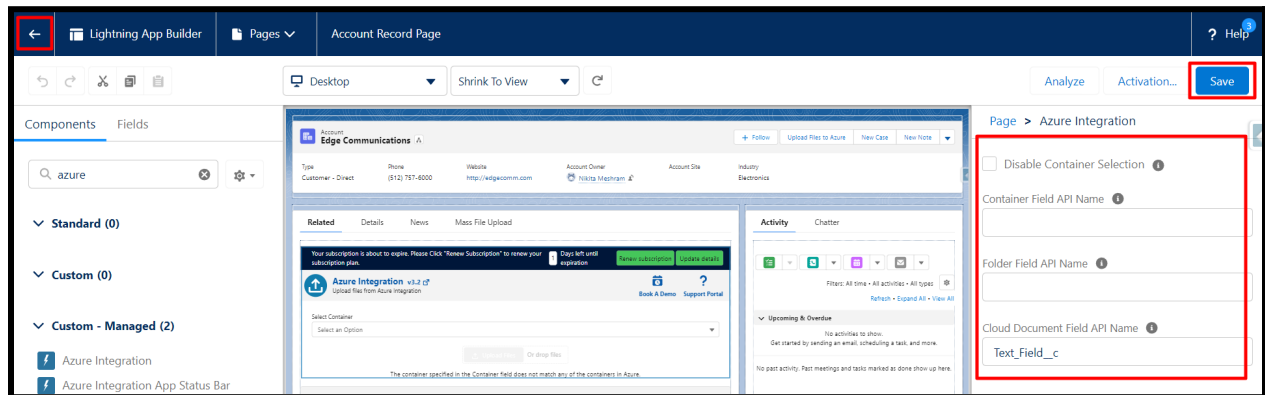
- Drag the **Azure Integration** component from the Custom section to any location on the record page.



- Set the attributes as per the requirement -
 - **Disable Container Selection** - The Select Container picklist will be disabled. If checked, the container value will be taken from the Azure Integration page, step 4(if the Container Field API Name is left empty) or from the value corresponding to the Container Field API Name field on the record(if Container Field API Name is filled).
 - **Container Field API Name** - The API name of the field on the record, the value of which you want to consider as a container in which the browsed files should be uploaded in Azure.
 - **Folder Field API Name** - The API name of the field on the record, the value of which you want to consider to name the folders in which the browsed files should be uploaded.
 - **Cloud Document Field API Name** - Enter the Field API Name from the Cloud Document object here to update against each Cloud Document record created, once the file upload is successful. It supports Checkbox, Picklist, Text, Text Area, and Text Area (Long) Field

Types. The field mentioned here will be available as an extra column in the upload prompt, available to update. (This feature is not available in the trial version)

- Now, click on **Save**.

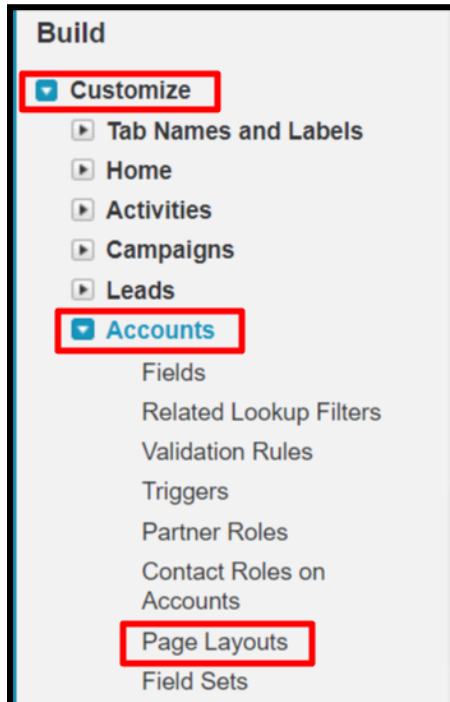


Step 7

In this step, update the record's page layout to include Cloud Document's related list. The same process will be followed for other standard or custom objects.

In Classic

- Go To **Setup** → **Customize** → **Accounts** → **Page Layouts**.



- Click **Edit** against the page layout to be updated.

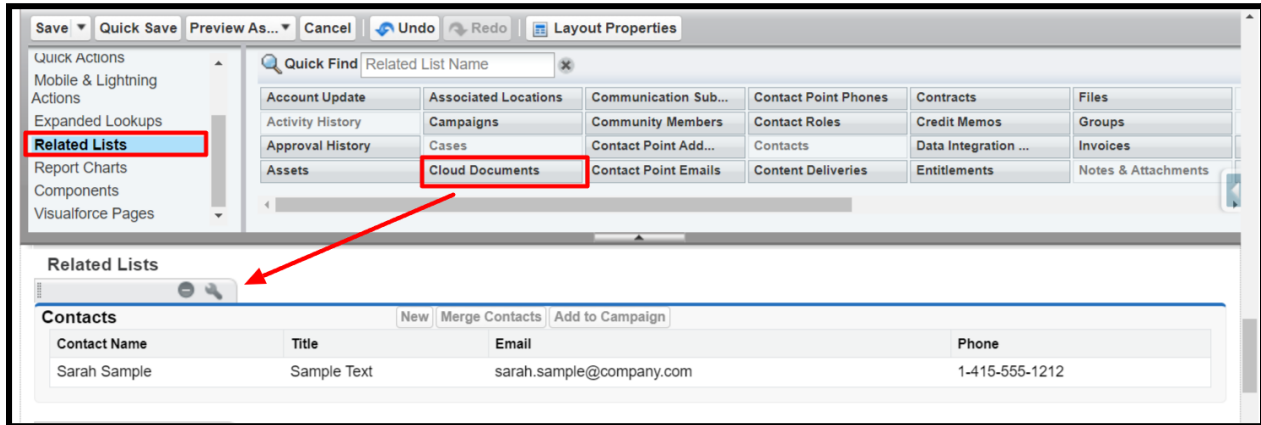
Account Page Layout Help for this Page ?

This page allows you to create different page layouts to display Account data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Account Page Layouts New Page Layout Assignment

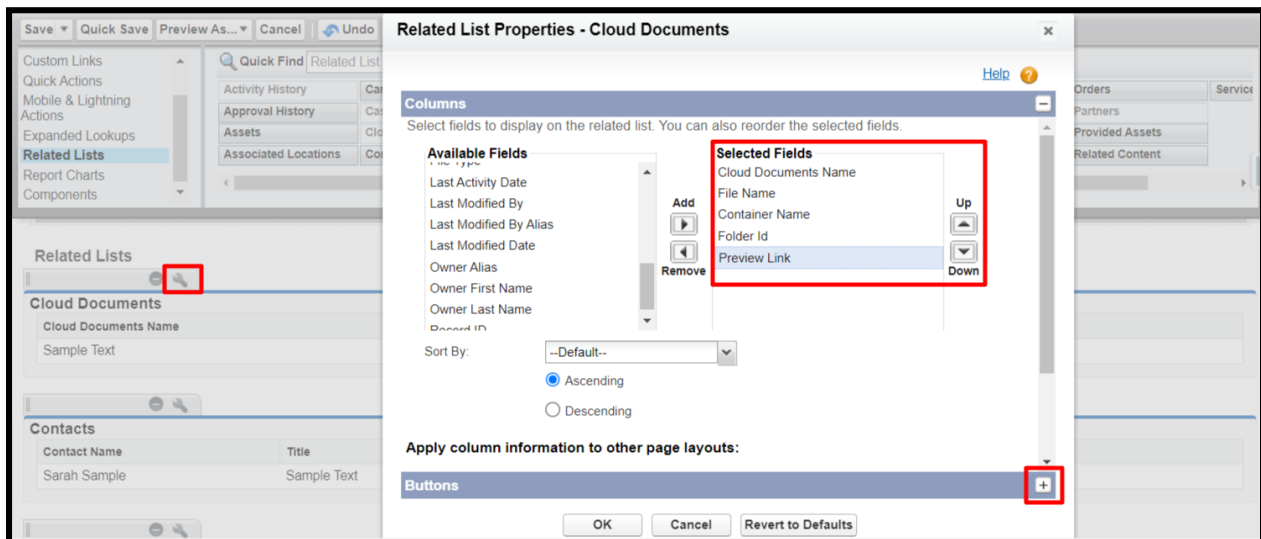
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Account (Marketing) Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM	☐
Edit Del	Account (Sales) Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM	☐
Edit Del	Account (Support) Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM	☐
Edit Del	Account Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM	☐

- Select **Related Lists** from the top left and then select **Cloud Documents** from the right section and drag it onto the page section as shown below -

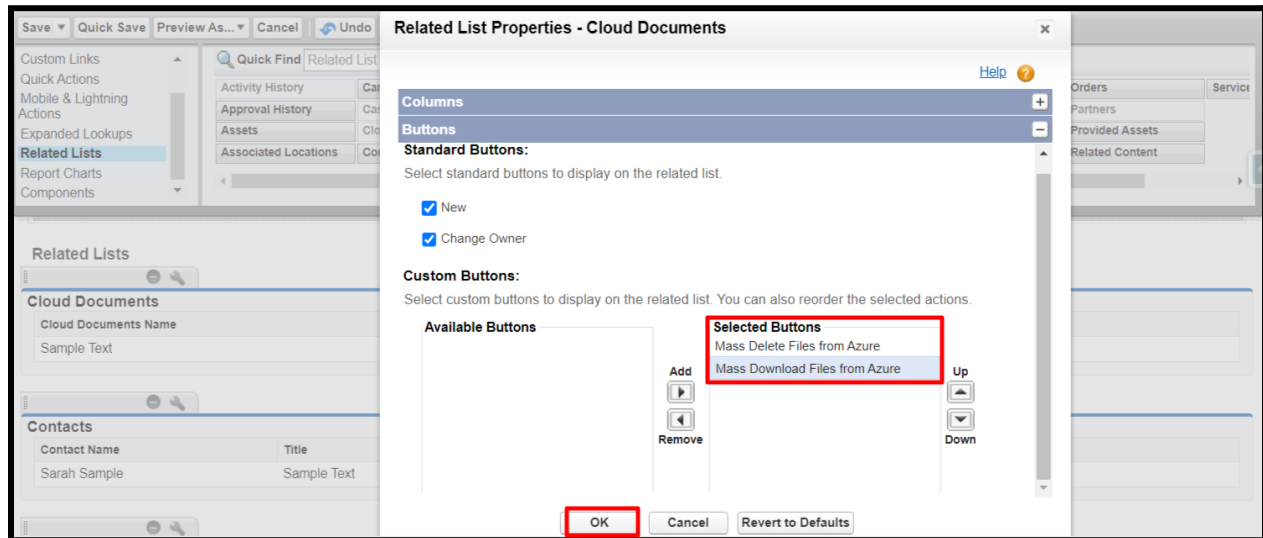


- Add the following columns:
 - Cloud Documents Name
 - File Name
 - Container Name
 - Folder Id
 - Preview Link

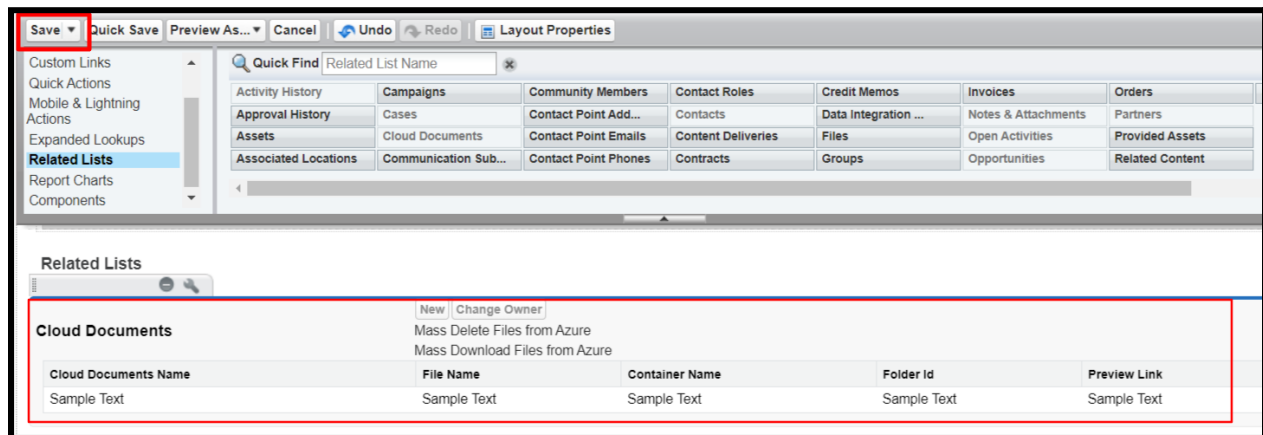
Then click on the + beside the buttons.



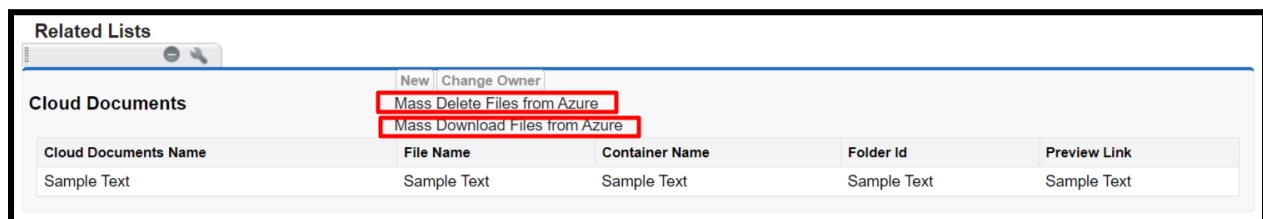
- Add the **Mass Delete Files from Azure** and **Mass Download Files from Azure** buttons from the **Available Buttons** to the **Selected Buttons** and click **OK**.



- Now click on **Save**.

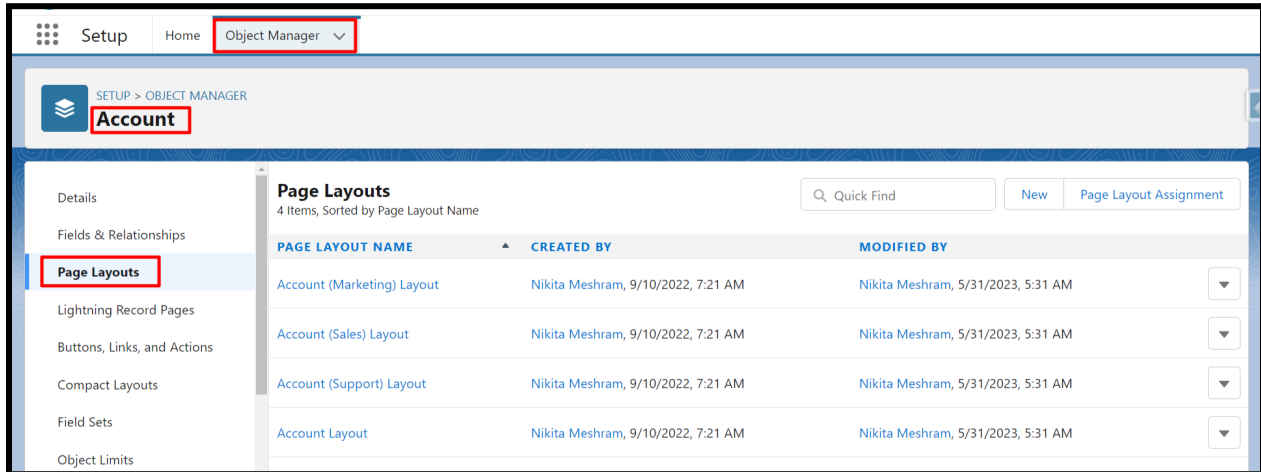


- Finally, **save** the page layout, and the related list is available on the detail page.



In Lightning

- Go To **Setup** → **Object Manager** → **Accounts** → **Page Layouts**.



Setup Home **Object Manager**

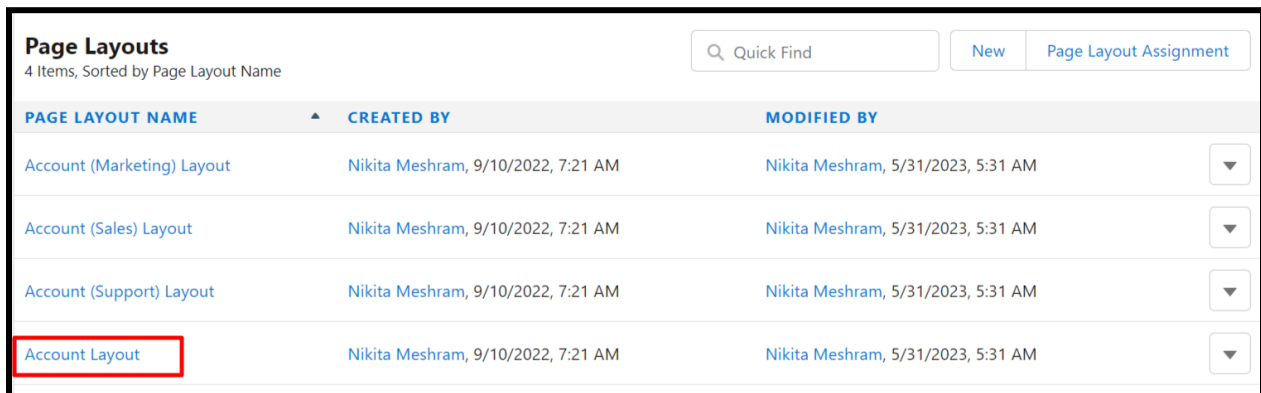
SETUP > OBJECT MANAGER
Account

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

Page Layouts
4 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM
Account (Sales) Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM
Account (Support) Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM
Account Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM

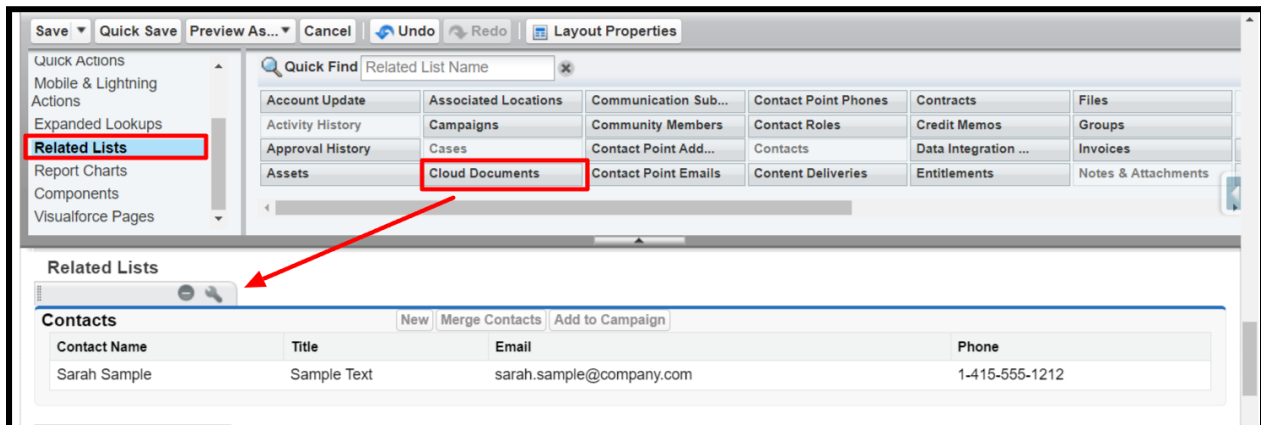
- Click **Account Layout** (against the page layout to be updated)



Page Layouts
4 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM
Account (Sales) Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM
Account (Support) Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM
Account Layout	Nikita Meshram, 9/10/2022, 7:21 AM	Nikita Meshram, 5/31/2023, 5:31 AM

- Select **Related Lists** from the top left, and then select **Cloud Documents** from the right section and drag it onto the page section



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Components
Visualforce Pages

Quick Find Related List Name

Account Update	Associated Locations	Communication Sub...	Contact Point Phones	Contracts	Files
Activity History	Campaigns	Community Members	Contact Roles	Credit Memos	Groups
Approval History	Cases	Contact Point Add...	Contacts	Data Integration ...	Invoices
Assets	Cloud Documents	Contact Point Emails	Content Deliveries	Entitlements	Notes & Attachments

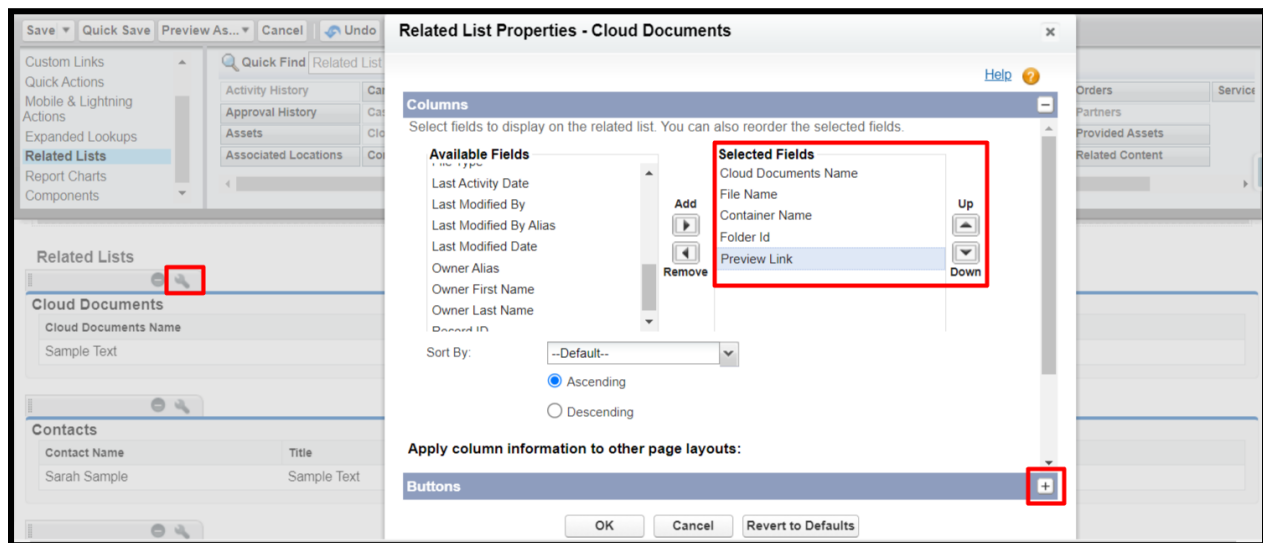
Related Lists

Contacts New Merge Contacts Add to Campaign

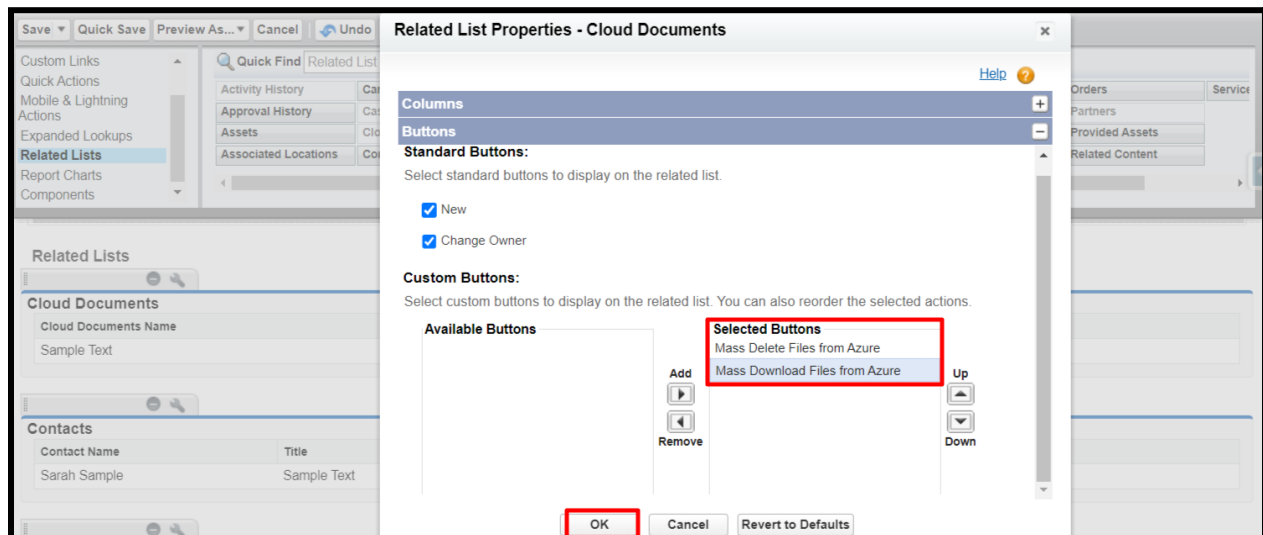
Contact Name	Title	Email	Phone
Sarah Sample	Sample Text	sarah.sample@company.com	1-415-555-1212

- Add the following columns:
 - Cloud Documents Name
 - File Name
 - Container Name
 - Folder Id
 - Preview Link

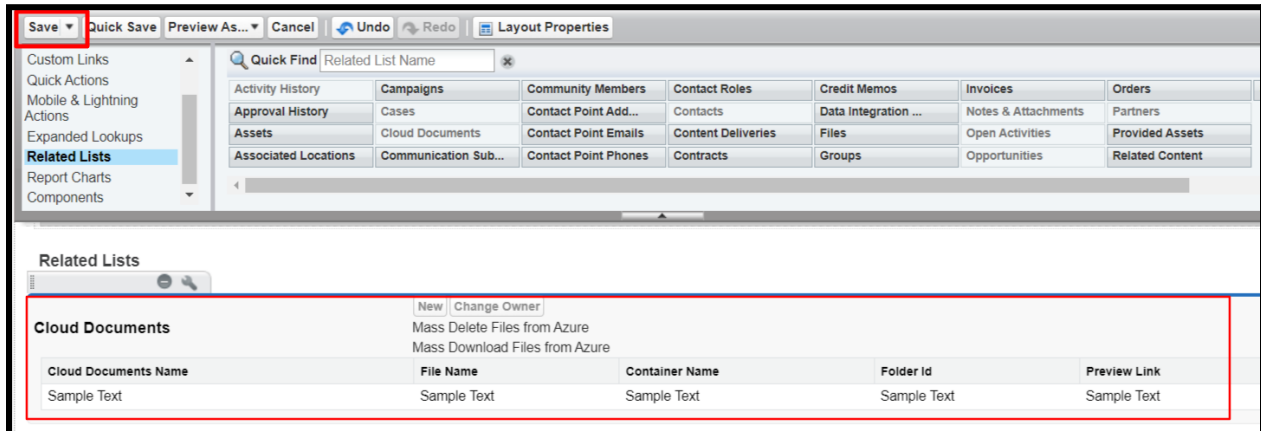
Then click on the + beside the buttons.



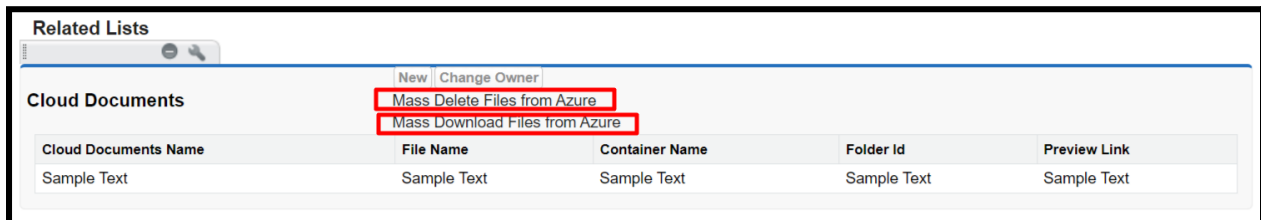
- Add the **Mass Delete Files from Azure** and **Mass Download Files from Azure** buttons from the **Available Buttons** to the **Selected Buttons**, and click **OK**.



- Now click on **Save**.

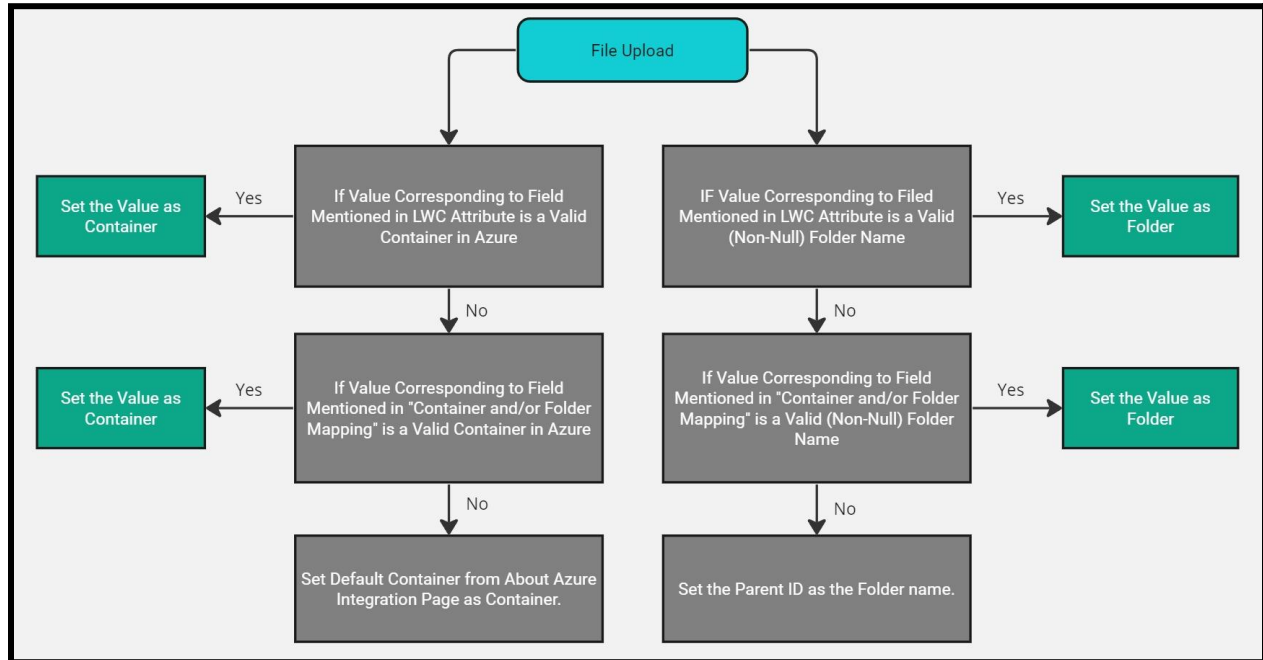


- Finally, **save** the page layout, and the related list is available on the detail page.



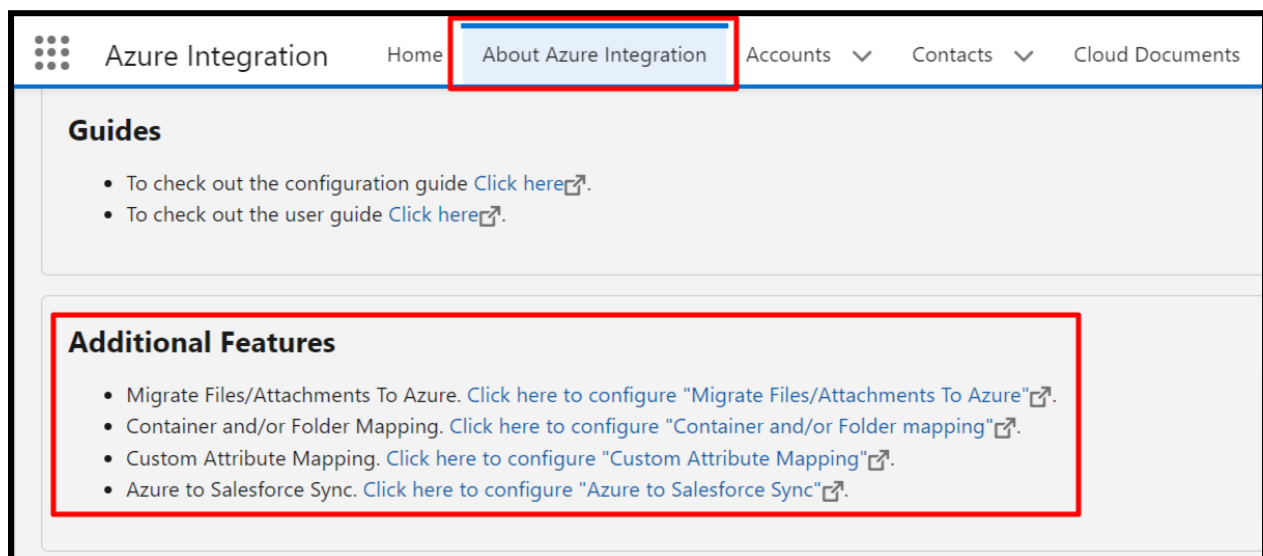
FlowChart

We are following this flow for selecting a Folder and a Container to upload to Azure. This flow will be respected whenever an upload to Azure is made, either from Azure Integration LWC, Migrate Now, or Migrate Real-Time.



Additional Features

On the **About Azure Integration** Page, you will see the Additional Features Details. Click on the respective Additional Feature Configuration link and complete the configuration steps.



The screenshot shows the 'About Azure Integration' page. The 'About Azure Integration' tab is highlighted in the navigation bar. Under the 'Guides' section, there are two links: 'Click here' for the configuration guide and 'Click here' for the user guide. Below this, the 'Additional Features' section is highlighted with a red box. It contains four items:

- Migrate Files/Attachments To Azure. [Click here to configure "Migrate Files/Attachments To Azure"](#)
- Container and/or Folder Mapping. [Click here to configure "Container and/or Folder mapping"](#)
- Custom Attribute Mapping. [Click here to configure "Custom Attribute Mapping"](#)
- Azure to Salesforce Sync. [Click here to configure "Azure to Salesforce Sync"](#)

1. Migrate Files/Attachments To Azure

This Feature will help you to migrate Files and Attachments in Real-Time from Salesforce to Azure Container. You can even migrate your existing Files and Attachments from Salesforce to Azure Container with a few clicks. Refer to the Docs for detailed steps and guidance -

 [How to Use Migrate Feature: Azure Integration](#)

2. Container and/or Folder Mapping

Using this feature, the User can dynamically define the container and folder in which the Files are getting uploaded, from the Salesforce record's field values. Here, the Field Value should be Present in the Azure Container List. Refer to the Docs for detailed steps and guidance -

 [How to Use Container and/or Folder Mapping Feature: Azure Integration](#)

3. Custom Attribute Mapping

This Feature will help the User create custom attribute mapping in Salesforce for desired objects. Here, users can select the fields of desired objects. So when the user uploads the files (either from upload UI, Migrate Now, or Migrate Real-Time) from Salesforce, the field values based on this custom attribute mapping will be sent to the Azure storage object to set the Metadata, and it will create the Custom Attribute records to the related Cloud Document records. Refer to the Docs for detailed steps and guidance -

 [How to Use Custom Attribute Mapping Feature: Azure Integration](#)

4. Azure to Salesforce Sync

The admin user can configure the settings from the About page - Azure to the Salesforce sync screen. With this feature, the user can now enable settings to create Cloud Document records in Salesforce when the files are uploaded in Azure storage. The user can also enable the setting to delete the Cloud Document records from Salesforce if the files are deleted from Azure storage. Refer to the Docs for detailed steps and guidance -

 [How to Use Azure to Salesforce Sync Feature: Azure Integration](#)

Conclusion

After configuring the entire app, you use the [Azure Integration User Guide](#) to understand how to use the Azure Integration app.

Support

If you are still facing difficulty or need any assistance, we are just an email away. Either raise a support ticket @ <https://azureintegration.satrangtech.com/> or email your queries/assistance/requests/feedback to azure@satrangtech.com