

Set Up Salesforce Files Sync

Salesforce, Spring '24



CONTENTS

Configure File Upload and Download Security Settings 1

CONFIGURE FILE UPLOAD AND DOWNLOAD SECURITY SETTINGS

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

To manage file upload and download settings:

1. From Setup, enter *File Upload and Download Security* in the Quick Find box, then select **File Upload and Download Security**.
2. Click **Edit**.

3. To prevent users from uploading files that can pose a security risk, select `Don't allow HTML uploads as attachments or document records`.

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



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

- If your organization uses the partner portal to give your partner users access to Salesforce, we don't recommend enabling this setting. Enabling this setting prevents your organization from customizing the appearance of your partner portal.
- HTML attachments are not permitted on solutions, regardless of whether this security setting is enabled. In addition, this setting does not affect attachments on email templates; HTML attachments on email templates are always permitted.
- After this setting is enabled, previously-uploaded HTML documents and attachments are unaffected. However, when users attempt to view an HTML attachment or document, their browser first prompts them to open the file in the browser, save it to their computer, or cancel the action.

4. Set download behavior for each file type:
 - a. **Download** (recommended): The file, regardless of file type, is always downloaded.
 - b. **Execute in Browser:** The file, regardless of file type, is displayed and executed automatically when accessed in a browser or through an HTTP request.
 - c. **Hybrid:** Salesforce Files are downloaded. Attachments and documents execute in the browser.
5. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

USER PERMISSIONS

To configure file upload and download settings:

- **Customize Application**