S3-Link File Search User Guide

Introduction

You can use our S3-Link File Search component to upload, search, download, preview, and delete files related to any Salesforce record. You can perform various file actions like Download, Preview, Delete, Copy, Move, New Version, Send Email, Share Link, and Open Link. Your System Admin can also enable some custom actions as well.

Prerequisite

To use the below features, your System Admin must add the **S3-File Search** component to your Salesforce record detail page. Please request your System Admin to follow the steps in the **S3-Link File Search Setup** to enable all the below features.
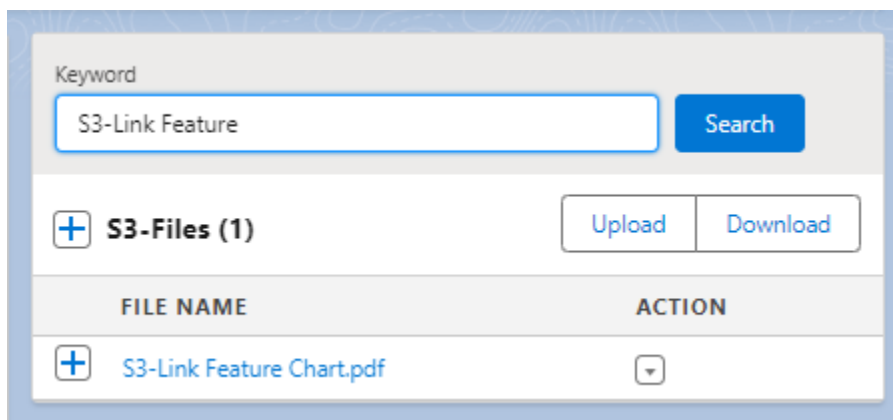
Functionality Overview

You can use the below functionalities by enabling this component. In this guide, we have covered it for Account records. But you use this for any other Salesforce records.

Search Files

The main use of this component is to display S3-Files related to the Salesforce record. You can also search the S3-Files by keyword in the Name. Follow the below steps for that.

1. Open Account record detail
2. Find S3-File Search
3. Type the keyword in the search box and click **Search**
4. S3-Files whose Name contains the keyword will be displayed in the list

Note: If you do not see the Search button, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**
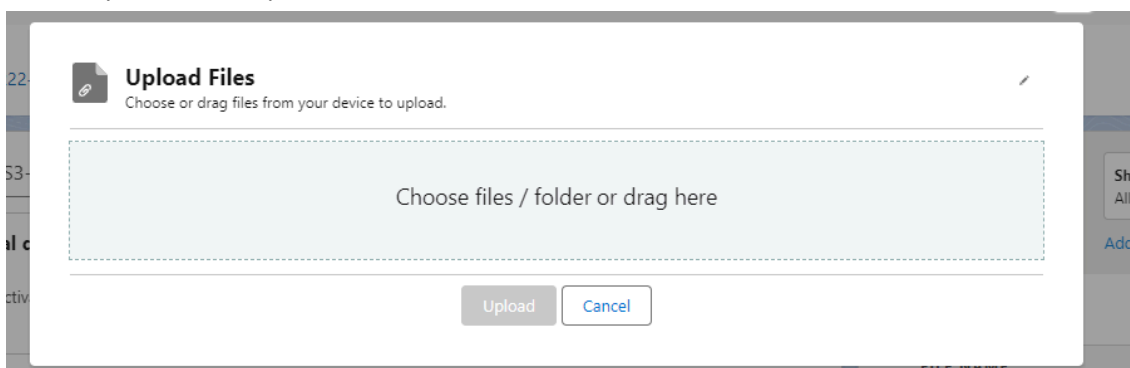
Upload New Files

You can upload new files and attach to the Salesforce record using S3-File Search. Below are the steps for that.

1. Open Account record detail
2. Find S3-File Search
3. Click on the **Upload**
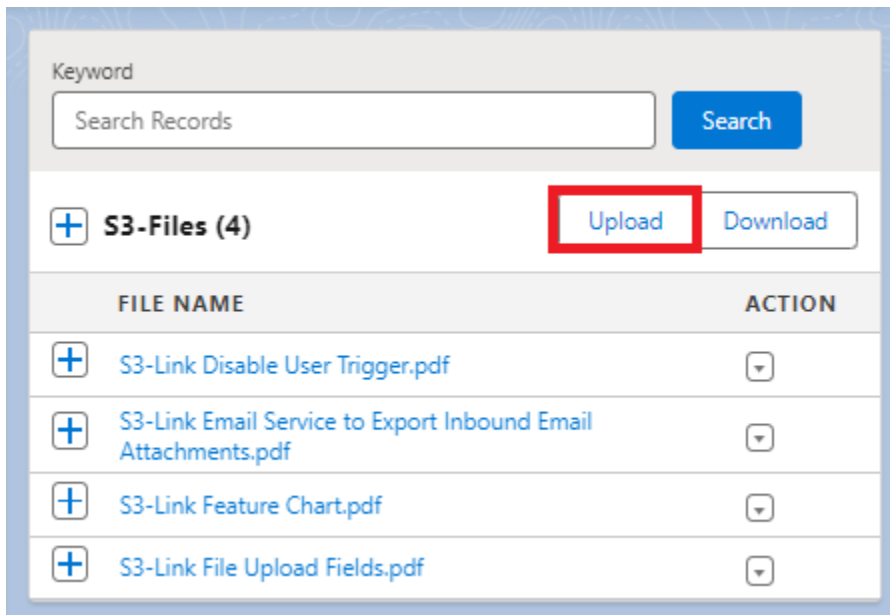
4. Click **Choose files** and it will open the file selector. Browse folders in your local storage and select the files you want to upload


5. You can also drag and drop files from your local storage
6. Click **Upload**
7. This will start uploading files in S3. Once files are uploaded in S3, you will see those files in the list of S3-Files.

Note: If you do not see the Upload button, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**
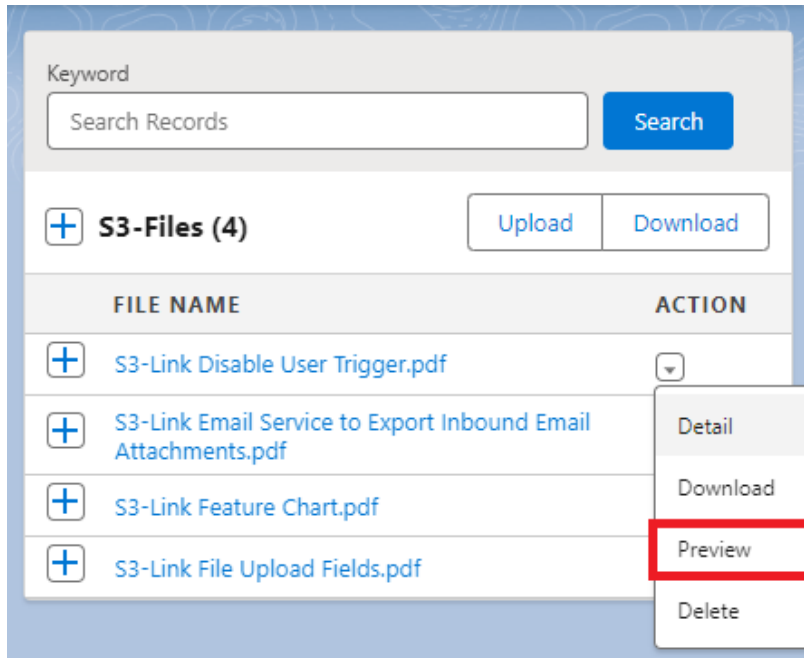
Download & Preview S3-File

You can download and preview any file that is displayed in the S3-Files list. Follow the below steps for that.

1. Open Account record detail
2. Find the S3-File Search
3. Click the menu for the S3-File that you want to download or preview
4. Click **Download** from the menu if you want to download the file
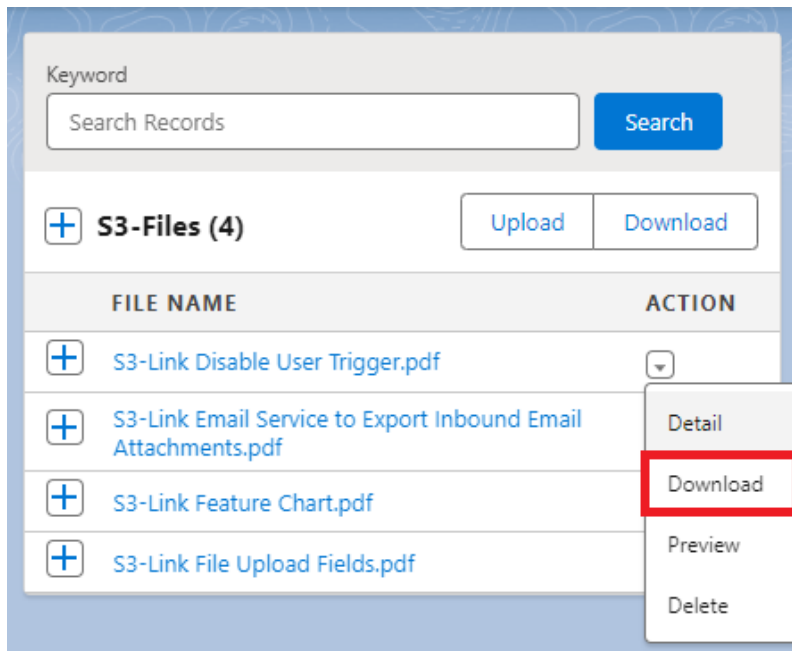
5. Click **Preview** from the menu if you want to preview the file

Note: If you do not see the Download & Preview actions for S3-Files, please contact your System Admin and request to enable them by following steps in the **S3-Link File Search Setup**

Delete S3-File

You can delete any file from the S3-Files list. The files deleted via this will go into S3-Link Recycle Bin if enabled. Follow the below steps for that.
1. Open Account record detail
2. Find the S3-File Search
3. Click the menu for S3-File which you want to delete
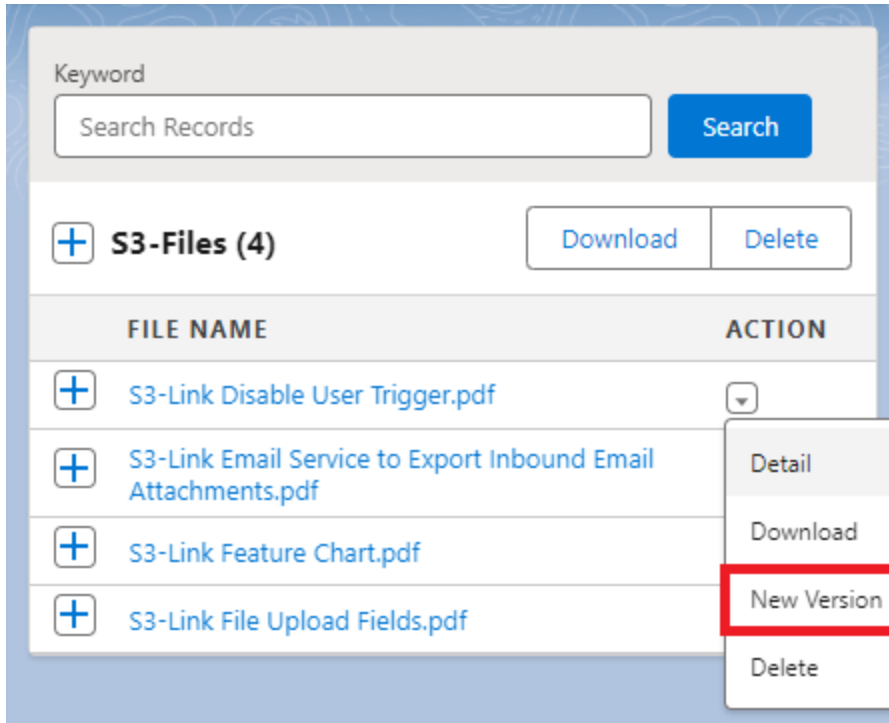4. Click **Delete** from the menu for the S3-File you want to delete
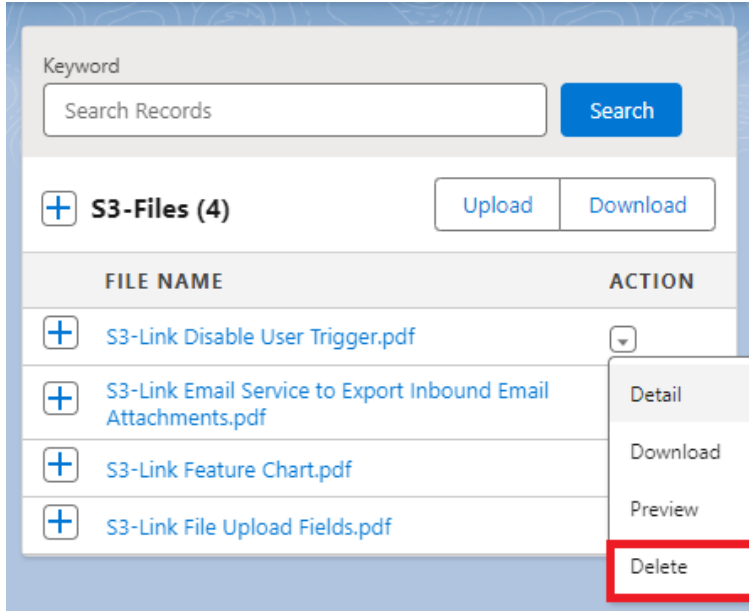
 Note: If you do not see the Delete action for S3-Files, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**
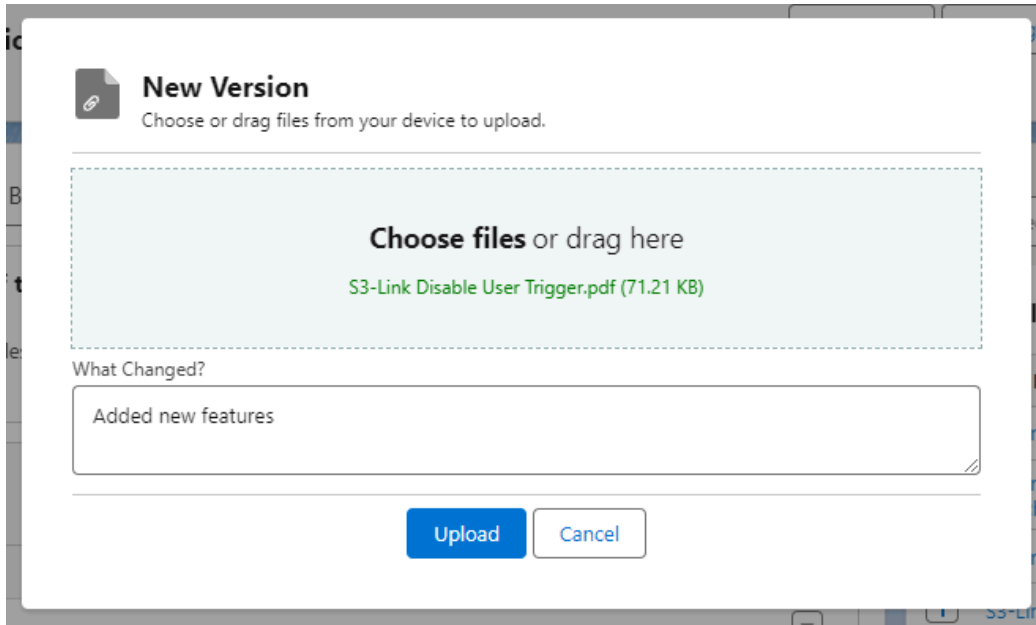
Upload New File Version

You can upload a new version of a file from the S3-File Search. Follow below steps for that.

1. Open Account record detail
2. Find the S3-File Search
3. Click **New Version** from menu for the S3-File for which you want upload new version

4. Click on **Choose files** and select the updated file which you want to upload as new version
5. Specify the changes made from the previous version in the **What Changes?**
6. Click **Upload** and this will upload the selected file as a new version


Notes:

● Follow the steps in the guide S3-Link Download & Preview File Version to download or view a specific file version of the S3-File record.

- If you do not see the New Version action for S3-Files, please contact your System Admin and request to enable this by following steps in the S3-Link File Search Setup
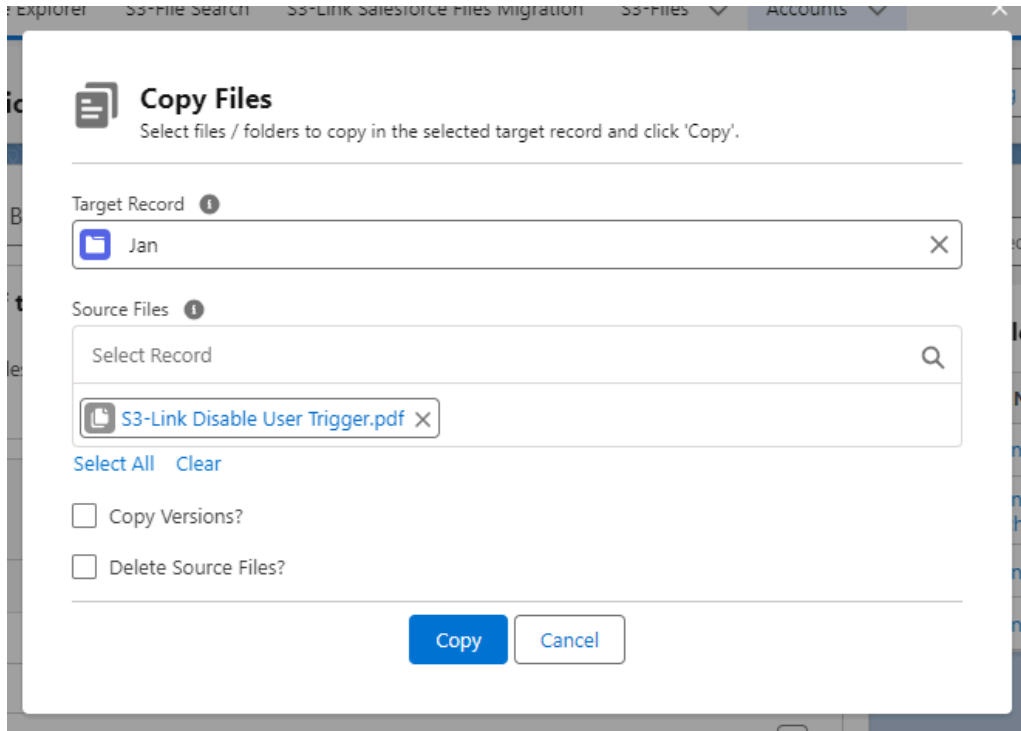
Copy File

You can copy a file from one folder to another folder of the Salesforce record. Follow the below steps to copy files.

1. Open Account record detail
2. Find the S3-File Search
3. Click **Copy** from the menu for the S3-File which you want to copy into another folder
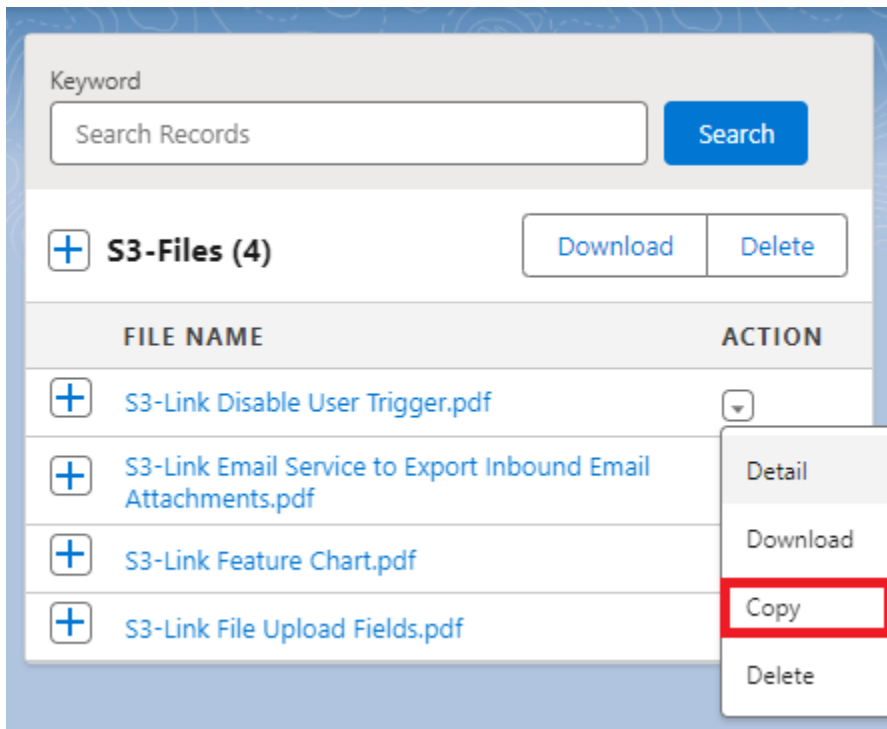
4. A pop-up will open to copy the file
5. Select the folder in which you want to copy the file as **Target Record**

6. If you want to copy all file versions along with the file then set the **Copy Versions?** checkbox to true
7. If you want to delete source files after copy then set the **Delete Source Files?** checkbox to true
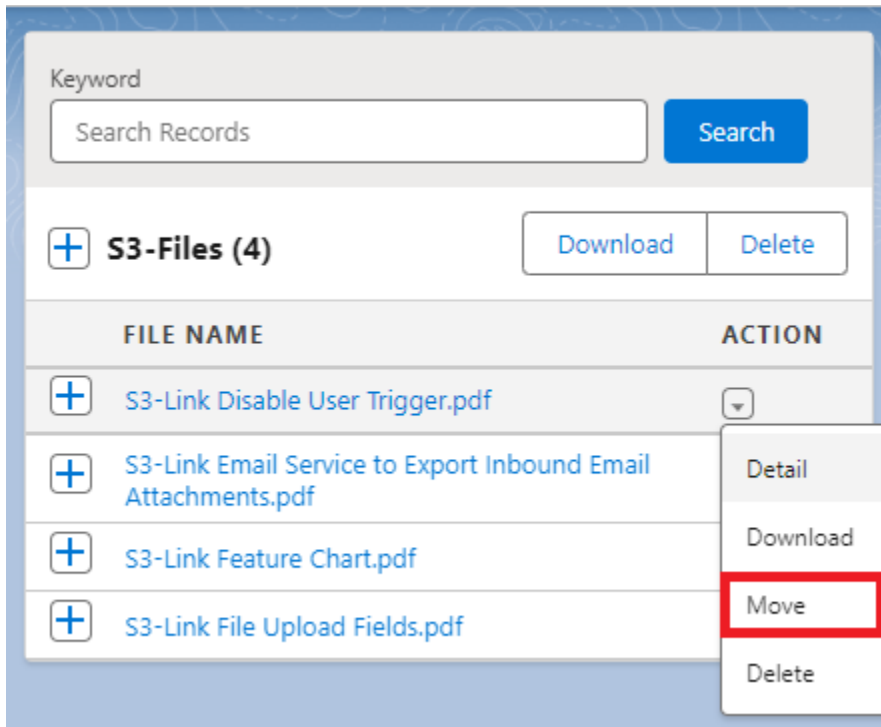8. Click **Copy** and the file will be copied to the target folder

Note: If you do not see the Copy action for S3-Files, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**
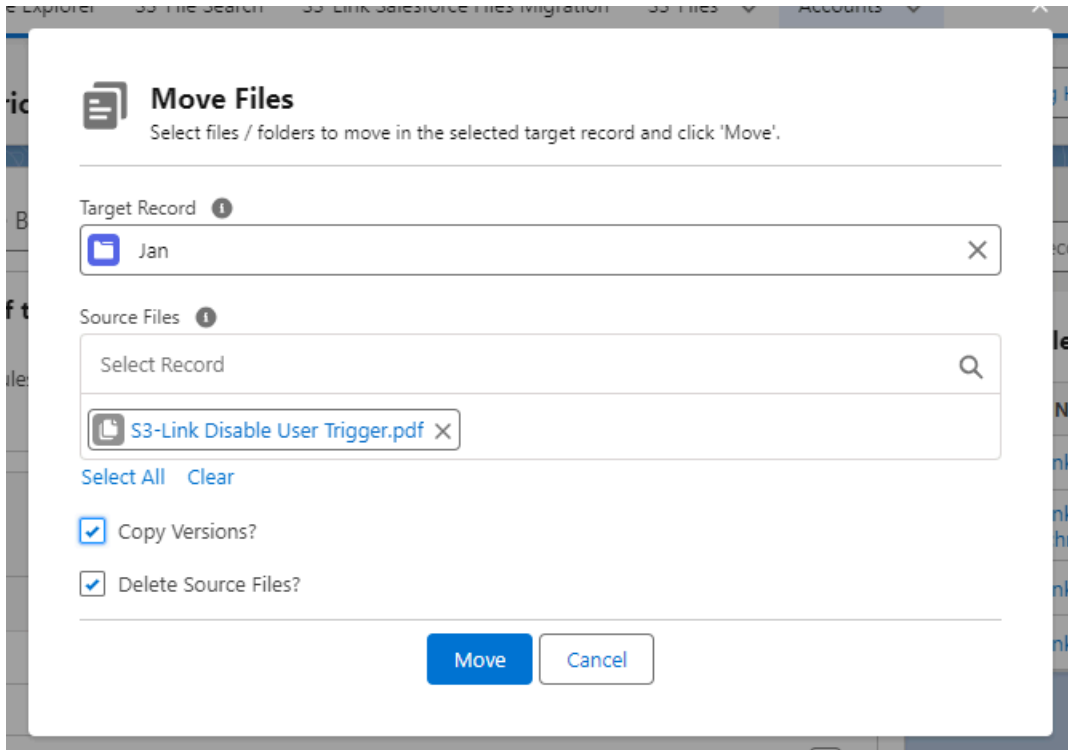
Move File

You can move a file from one folder to another folder of the Salesforce record. Follow the below steps to move files.

1. Open Account record detail
2. Find the S3-File Search

3. Click **Move** from the menu for the S3-File which you want to move into another folder

4. A pop-up will open to move the file
5. Select the folder in which you want to move the file as **Target Record**

6. If you want to copy all file versions along with the file then set the **Copy Versions?** checkbox to true
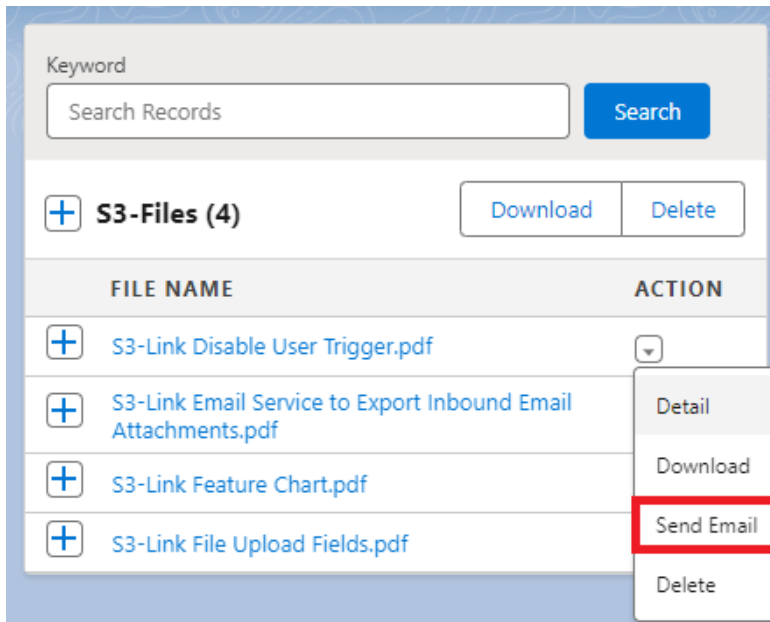
7. Click **Move** and the file will be moved to the target folder

Note: If you do not see the Move action for S3-Files, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**

Send File via Email

You can send S3-File to other external users via emails. Follow below steps for that.

1. Open Account record detail
2. Find the S3-File Search
3. Click **Send Email** from menu for the S3-File which you want to send via email

4. A pop-up will open to send an email

5. Add the necessary details to the send email
6. Click **Send**

Note:
1. If you do not see the Send Email action for S3-File, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**
2. If you want more details about our Email Files functionality, check **S3-Link Email Files User Guide**
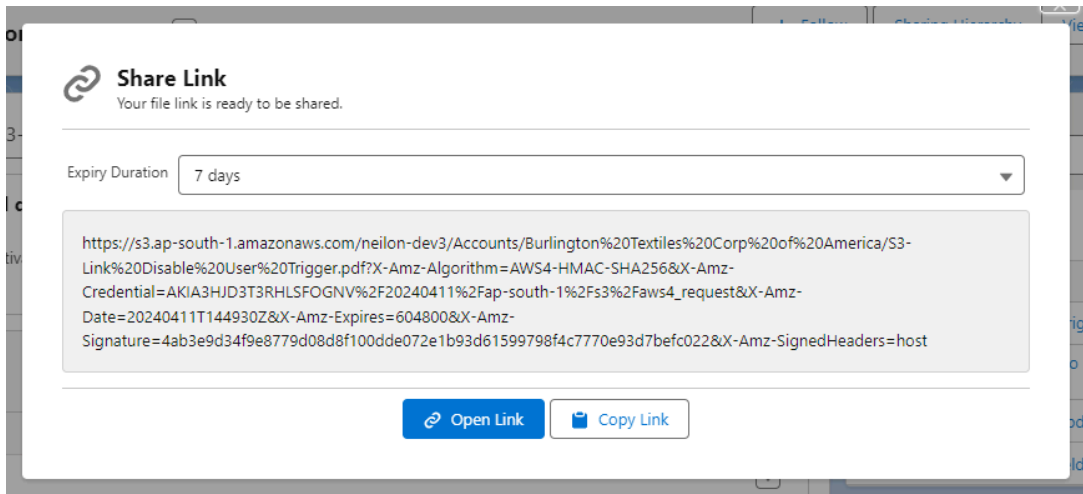
Share Link

You can copy and share the AWS link for any S3-File. Users will be able to view and download the file using that AWS link. Follow the below steps for that.

1. Open Account record detail
2. Find the S3-File Search
3. Click on the **Share Link** from menu for the S3-File which you want to share
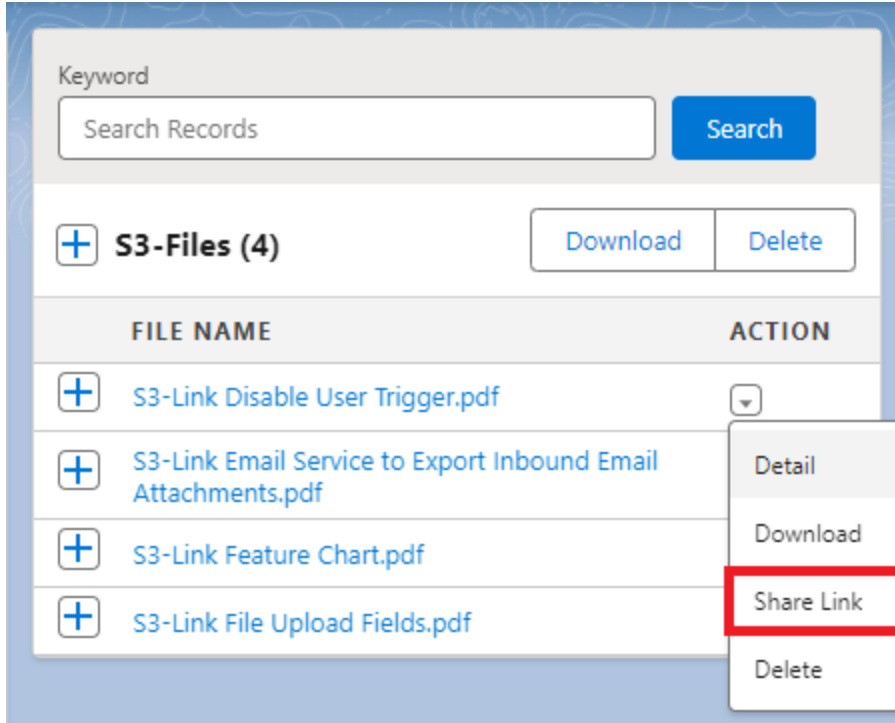
4. A pop-up will open with AWS Link of the file
5. Select the expiry duration of the link
6. Click **Copy Link** if you want to copy the link
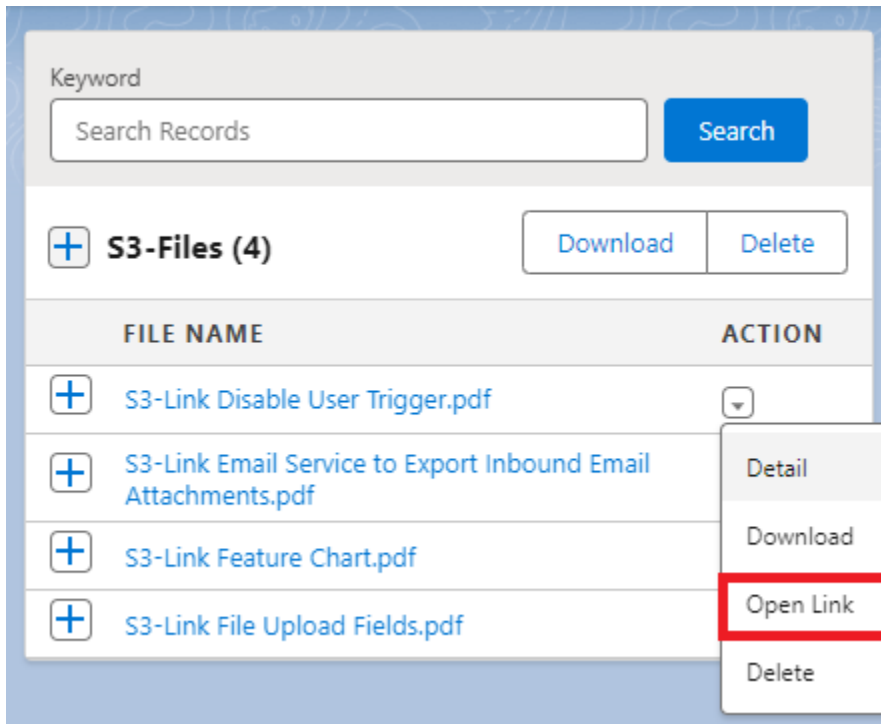7. Click **Open Link** if you want to open the link in a new browser tab

Note: If you do not see the Share Link action for S3-Files, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**
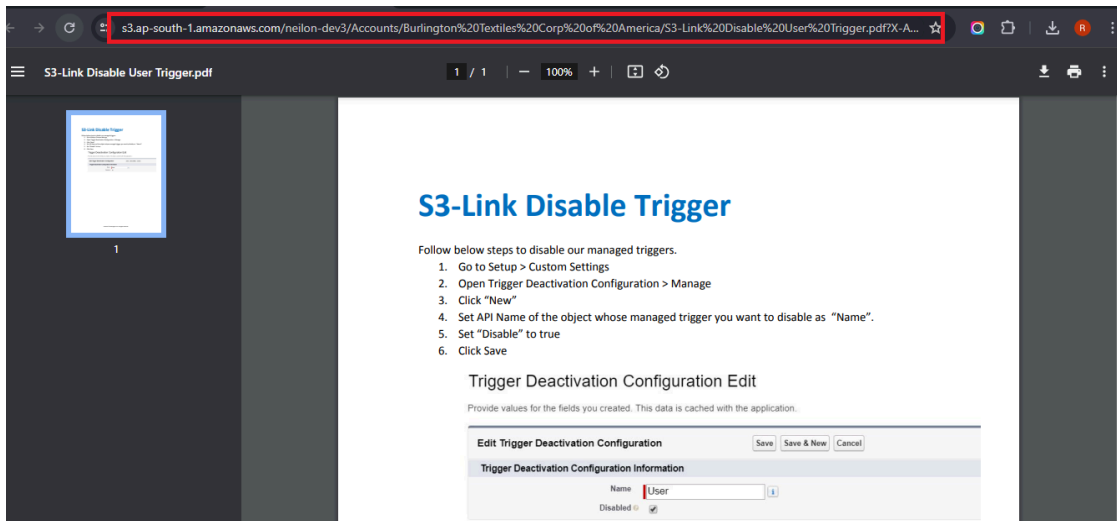
Open Link

You can open the file in the new browser tab using the AWS link. Follow the below steps to open the link.

1. Open Account record detail
2. Find the S3-File Search
3. Click on the **Open Link** from menu for the S3-File which you want to open

4. It will open the AWS link of the S3-File in new browser tab
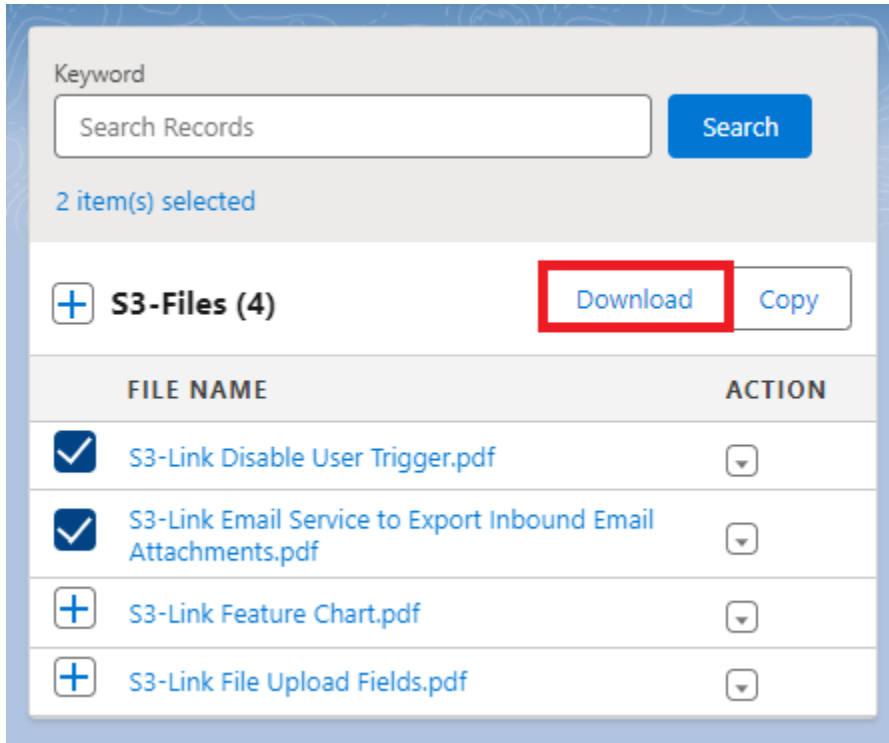

Note: If you do not see the Open Link action for S3-Files, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**
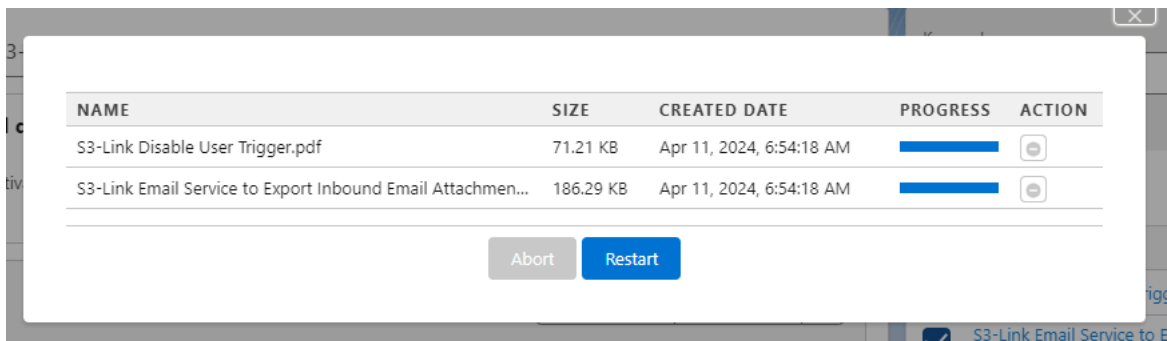
Multiple Files Download
You can select multiple files and download them as a zip file. Follow below steps for that.

1. Open Account record detail
2. Find the S3-File Search component
3. Select S3-Files which you want to download and click **Download**

4. All selected files will be download and saved as a zip file in local storage

5. While downloading, you have the option to abort the process by clicking on the **Abort**

Note: If you do not see the Download button, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**
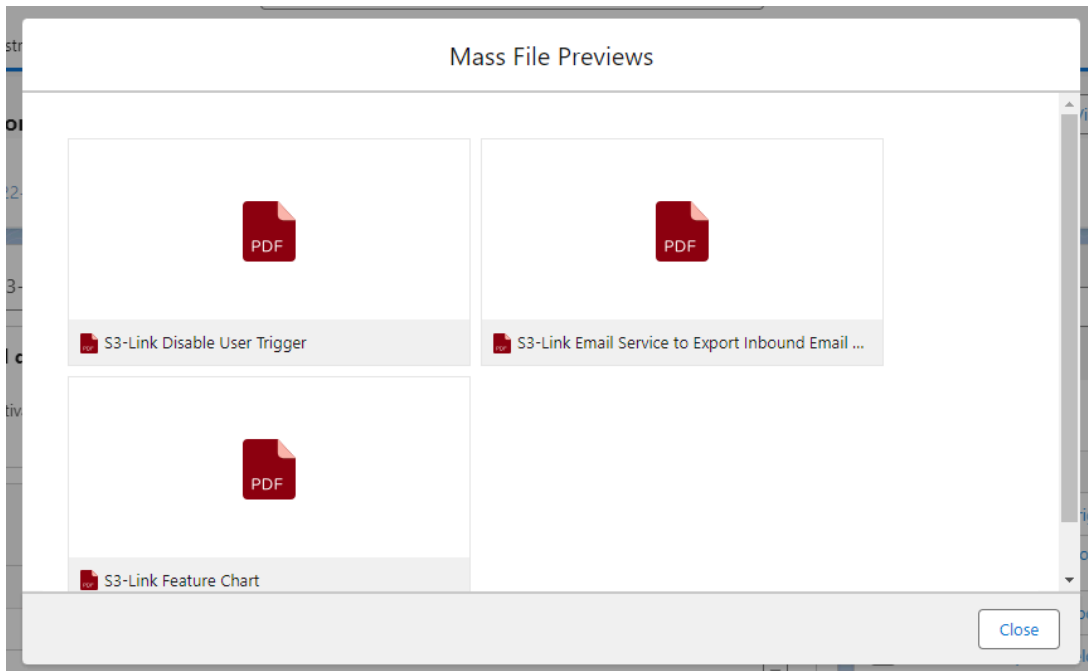
Multiple Files Preview

You can select multiple files and preview them. Follow below steps for that.

1. Open Account record detail

2. Find the S3-File Search
3. Select S3-Files which you want to preview and click **Preview**
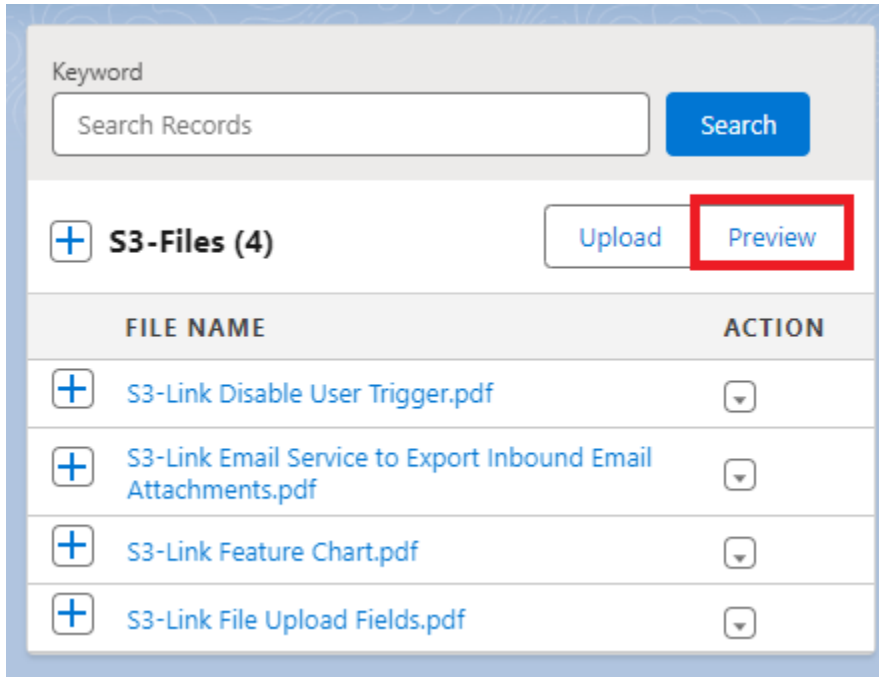
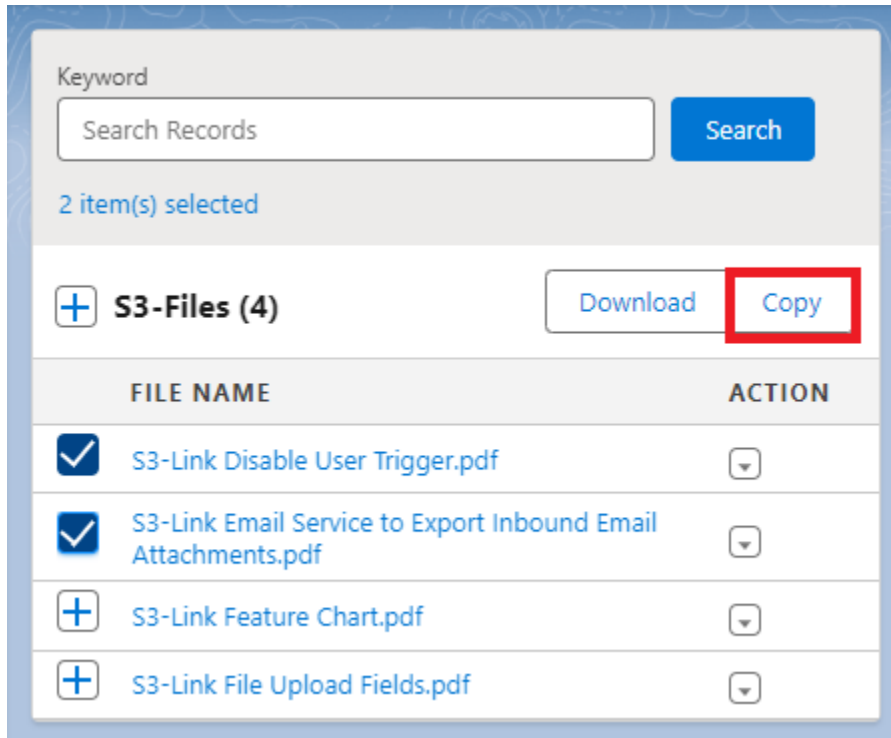4. Preview of selected files will be loaded

Note: If you do not see the Preview button, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**

Multiple Files Copy

You can select and copy multiple files from one folder to another folder of the Salesforce record. Follow below steps for that.

1. Open Account record detail
2. Find the S3-File Search
3. Select S3-Files which you want to copy into another folder and click **Copy**

4. A pop-up will open to copy selected files
5. Select the folder in which you want to copy the file as **Target Record**
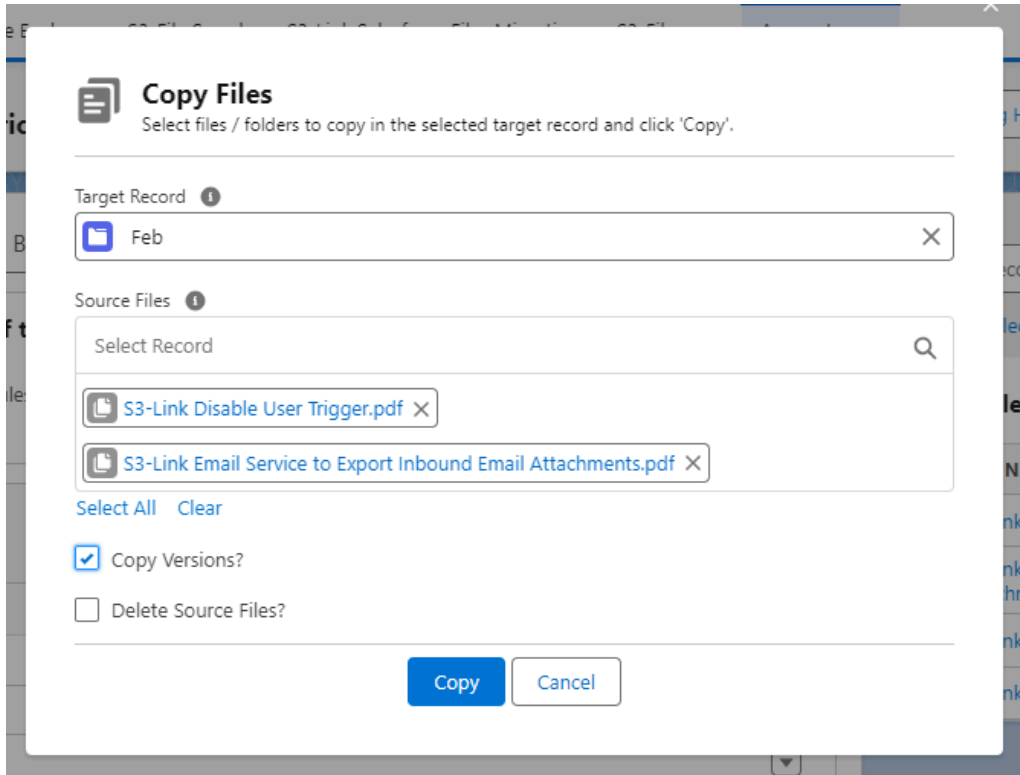
6. If you want to copy all file versions along with the file then set the **Copy Versions?** checkbox to true
7. If you want to delete source files after copy then set the **Delete Source Files?** checkbox to true
8. Click **Copy** and files will be copied to the target folder

Note: If you do not see the Copy button, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**

Multiple Files Delete

You can select multiple files and delete them. The files deleted via this will go into S3-Link Recycle Bin if enabled. Follow below steps for that.

1. Open Account record detail
2. Find the S3-File Search component
3. Select S3-Files which you want to delete and click **Delete**
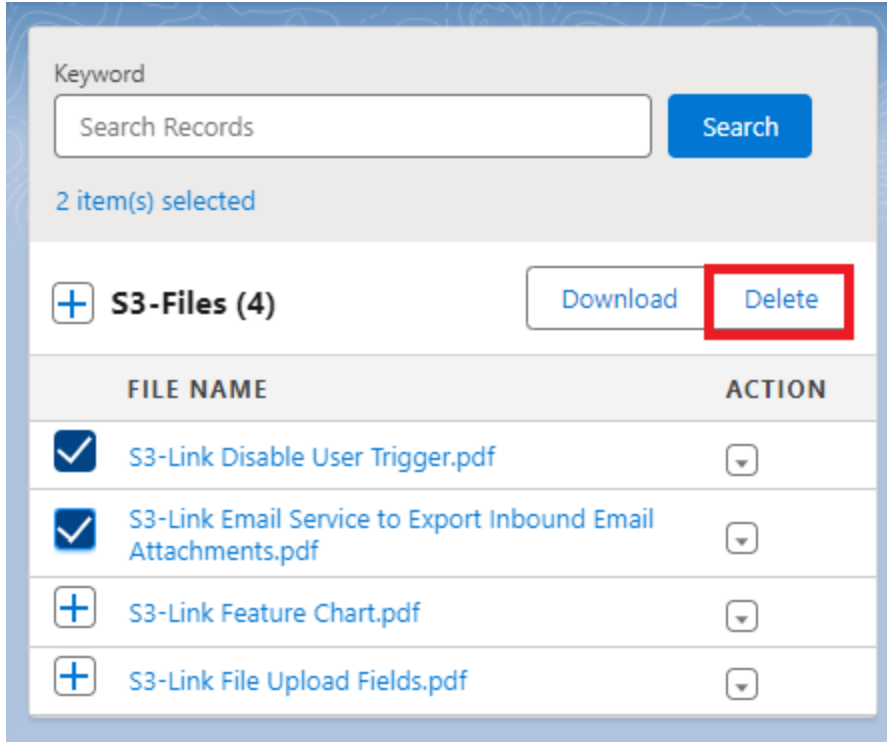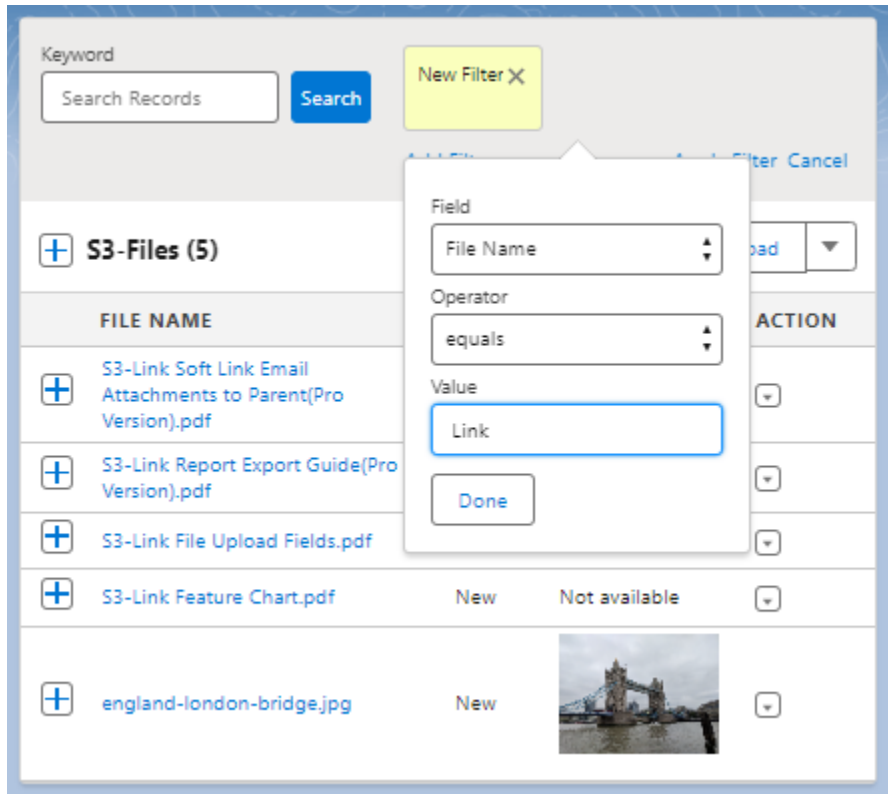
4. Selected files will be removed

Note: If you do not see the Delete button, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**

Filter Files using Criteria

You can use various filter criterias to search S3-Files. Follow below steps to use filter criteria to search S3-Files.

1. Open Account record detail
2. Find the S3-File Search

3. Click on **Add Filter**. Select the Field, Operator and their Value. Click on **Done**.

4. You can add multiple filters like this.
5. Click **Apply Filter**. It will display S3-Files which fulfills the Filter Criterias.
6. You remove the filter by clicking **Remove Filter**

Note: If you do not see the Add Filter link, please contact your System Admin and request to enable this by following steps in the **S3-Link File Search Setup**