

G-Link Deployment Guide - Google Drive

Introduction

G-Link connects Salesforce to Google Drive. Store file(s) related to any Salesforce object on Google Drive without any limit. Control access for file(s) on Google Drive.

The G-Link application is available as a managed package that can be installed on an existing Salesforce installation.

Prerequisite

1. Sign Up for Google Drive

To start with G-Link, you must have Google Client Id, Google Secret Id and Google Refresh Token. For that you need to Sign Up for Google Drive. If you already have a Google Drive account just ignore it. Otherwise follow the **G-Link Google Drive Sign Up** document.

G-Link deployment with new Salesforce installations

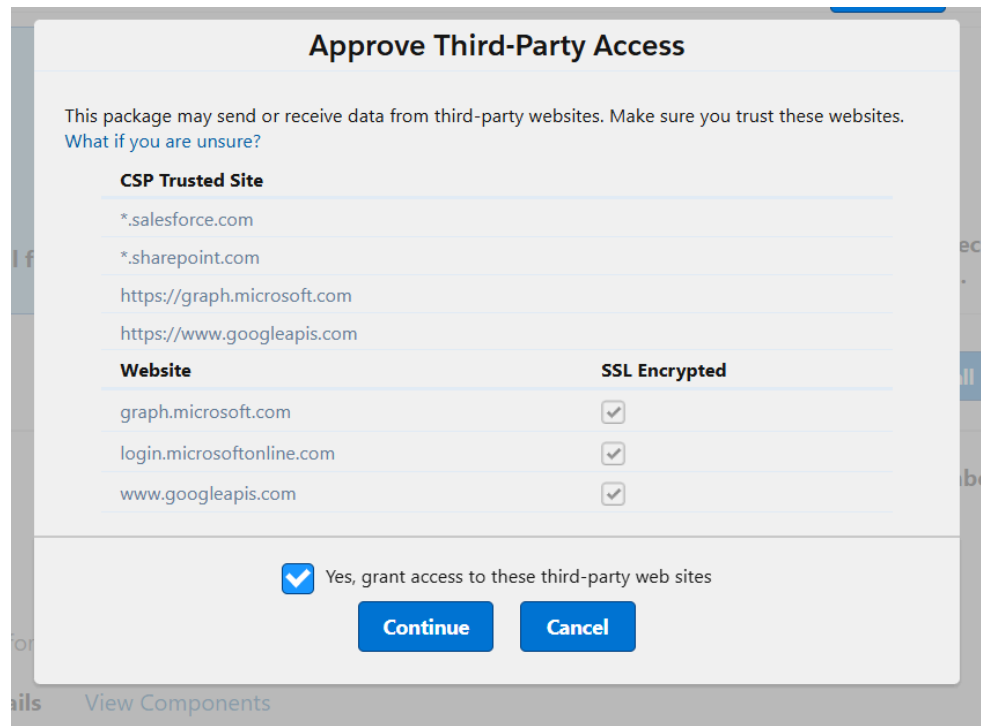
1. Installing the G-Link package

The G-Link application is installed as a managed package in an existing Salesforce installation. To start the G-Link installation, click on the URL provided by Neilon team and login in the org you want to install the package

Salesforce provides single step installation. Before clicking on Install, follow the steps given below.

1. Enter the password (if you have been provided)
2. Select option **Install for Admin Only**
3. Click **Install**

4. Approve Third-Party Access and **Continue**.



The installation will take a few minutes to complete. Once the installation is finished, you will receive a confirmation email.

2. **Enable Visualforce pages as Iframes in Salesforce org(if disabled)**

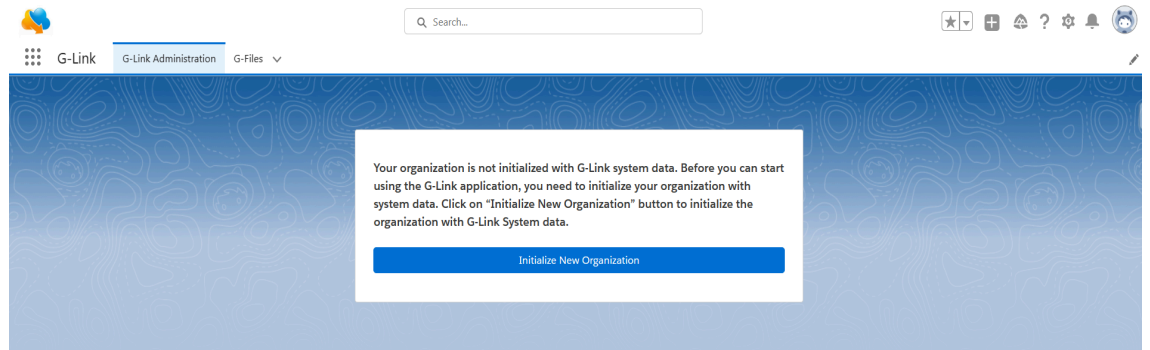
We are using visualforce pages to allow System Admin to configure G-Link from G-Link Administration. We open these visualforce pages as iframes in G-Link Administration. If iframes are blocked in your org, these configuration pages will not load. Please follow the steps in the **G-Link Iframes with Clickjack Protection** guide to enable our visualforce pages as iframe in your.

3. **Initializing the application configuration**

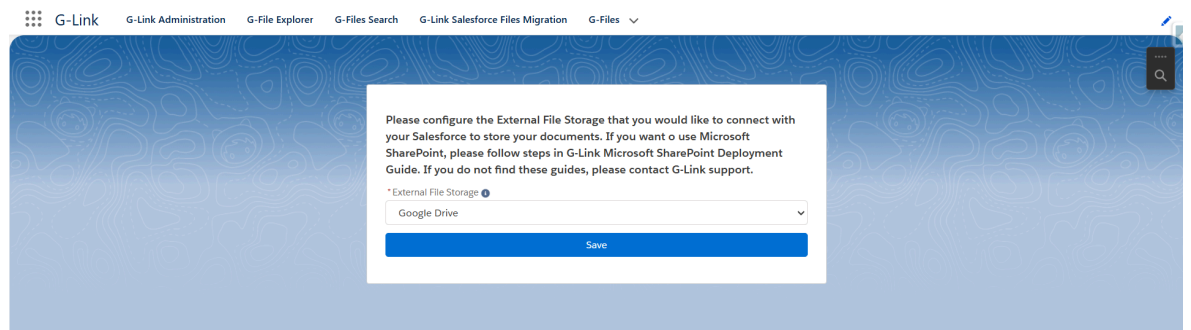
Once the G-Link package is installed, you need to initialize the application configuration.

1. From the Application Launcher, select **G-Link**.

2. Now, select the **G-Link Administration** tab. From this display, click the **Initialize New Organization** button.



3. Select the **Google Drive** for **External File Storage** and Click Save

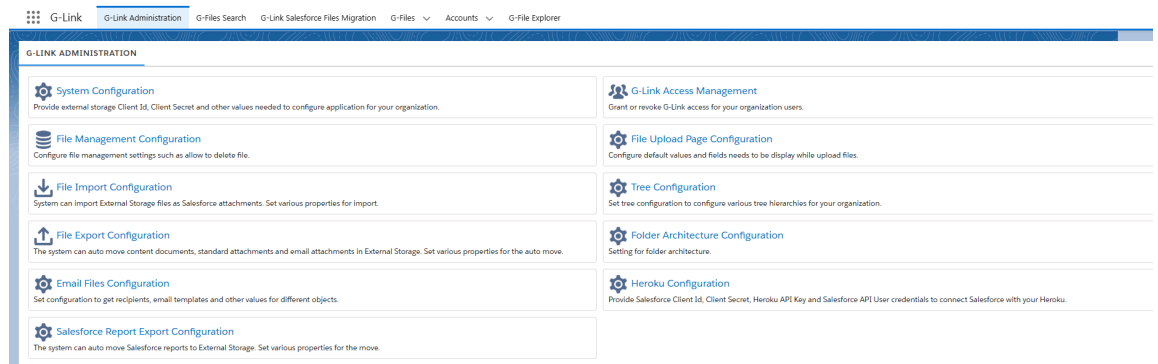


The application configuration is now initialized.

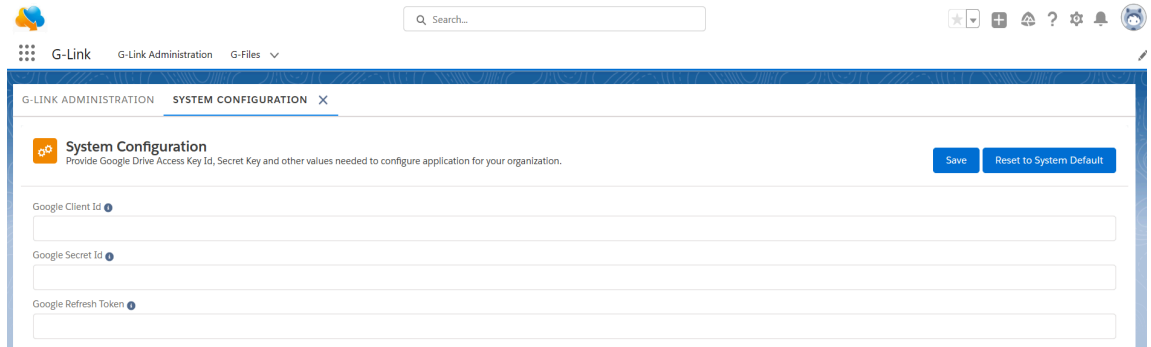
4. Updating system properties

After initializing the G-Link configuration, you need to set up a couple of system properties specific to each customer's environment.

1. From the **G-Link Administration** tab, click **System Configuration**



2. Set the **Google Client Id**, **Google Secret Id** and **Google Refresh Token** properties you get at the time of G-Link Google Drive Sign Up. Click Save.



The screenshot shows the 'System Configuration' page in the G-Link administration interface. The page title is 'SYSTEM CONFIGURATION' and it includes a search bar and navigation links for 'G-Link', 'G-Link Administration', and 'G-Files'. The main content area is titled 'System Configuration' and contains the instruction: 'Provide Google Drive Access Key Id, Secret Key and other values needed to configure application for your organization.' There are two buttons: 'Save' and 'Reset to System Default'. Below this, there are three input fields labeled 'Google Client Id', 'Google Secret Id', and 'Google Refresh Token', each with a small help icon to its right.

5. Manage Google Drives

System Admin can manage Google Drives. System admin can create new drives as well as link available drives on Google Drive to Salesforce. All drives linked to Salesforce will be displayed on File Explorer pages as a root node so avoid linking too many drives. Follow below steps to link or create Google Drives.

1. Link existing Google Drives

Follow below steps to link existing Google Drives

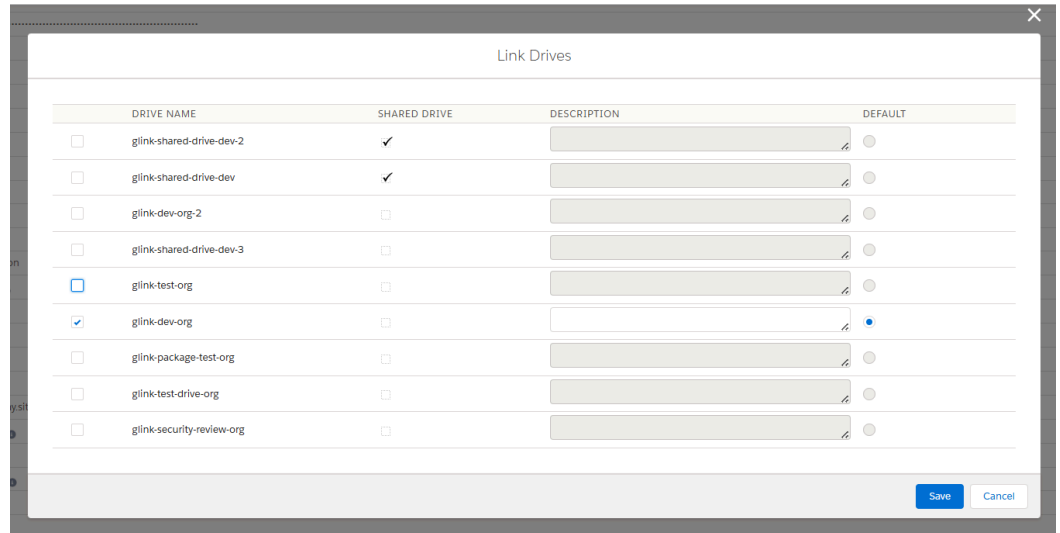
1. Click **Link Drives** in the Drives section of **System Configuration**.



The screenshot shows the 'Drives' section of the System Configuration page. It features a sub-header 'Drives' and a message: 'No External Storage drive is configured. You can create a new drive through "Create Drive" or link existing drives through "Link Drives" button.' There are two buttons: 'Create Drive' and 'Link Drives'.

2. If there are any drives available on Google Drive, it will be displayed there. Select drives you want to link with your Salesforce org. Set one drive as **Default**. All files

attached to any Salesforce records will go into the default drive.

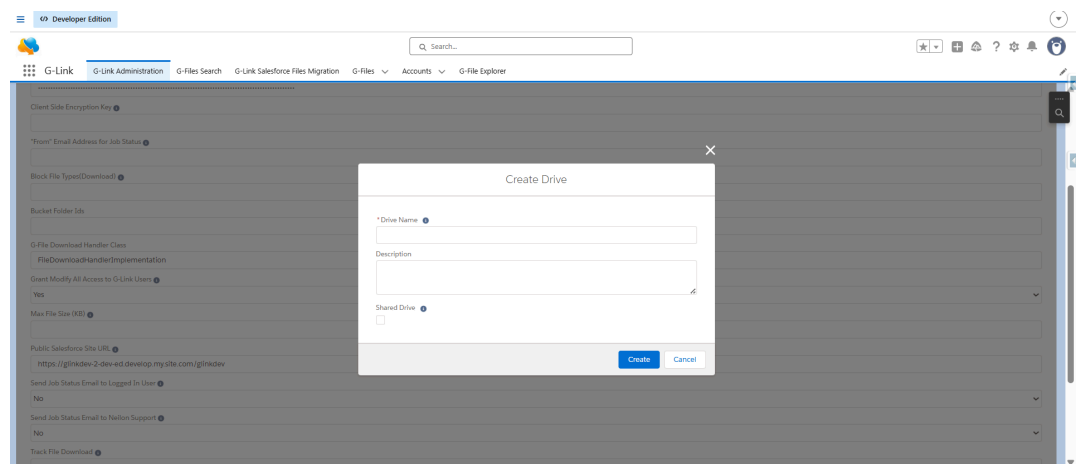


3. Click **Save**

2. Create Google Drives

Follow below steps to create new Google Drives

1. Click **Create Drive** in the Drives section of **System Configuration**.
2. Provide the Drive Name



3. Click **Create**

6. Assign permission sets to users

Follow below steps to assign our permission set to your users

1. Go to G-Link Administration > G-Link Access Management
2. Click **Grant Access to All**

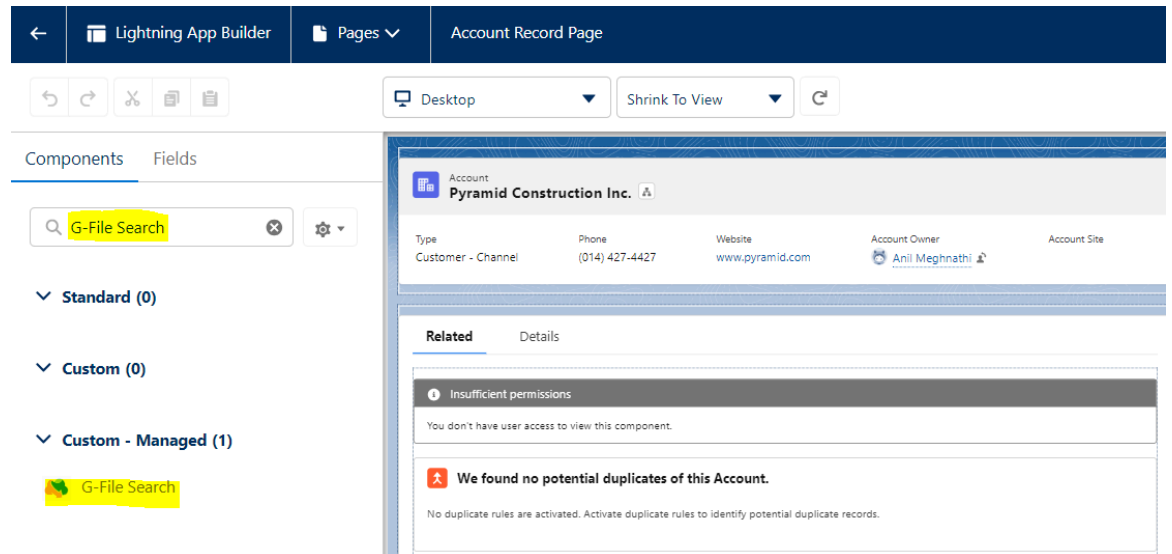
7. Configure G-Link for Salesforce objects (Optional)

G-Link allows you to attach files to any Salesforce object. Once you configure it for a Salesforce object, you will see the related list for file on layout for those objects. From there you can add/delete related files. To configure it, follow **G-Link for Salesforce Custom Objects** document.

8. Add G-File Search component in the Salesforce Record detail pages

In order to allow end users to attach files to Salesforce records, you will have to add our G-File Search component in your Salesforce record detail pages. The G-File Search component will display a list of all Google Drive files attached to the Salesforce record and it will also allow users to upload new files. Follow below steps to add our G-File Search component in the Salesforce record pages.

1. Open the record list(list view) of Salesforce standard or custom object for which you want to enable attaching Google Drive files.
2. Open one Salesforce record detail from the list
3. Click the Setting or gear icon on the top right corner and click **Edit Page**
4. Search for **G-File Search** in Components section



5. Drag & drop our our **G-File Search** component in your Salesforce record detail page
6. Click **Save**

