

# G-Link Deployment Guide - SharePoint

## Introduction

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

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

## Prerequisite

### 1. Sign Up for SharePoint

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

## G-Link deployment with new Salesforce installations

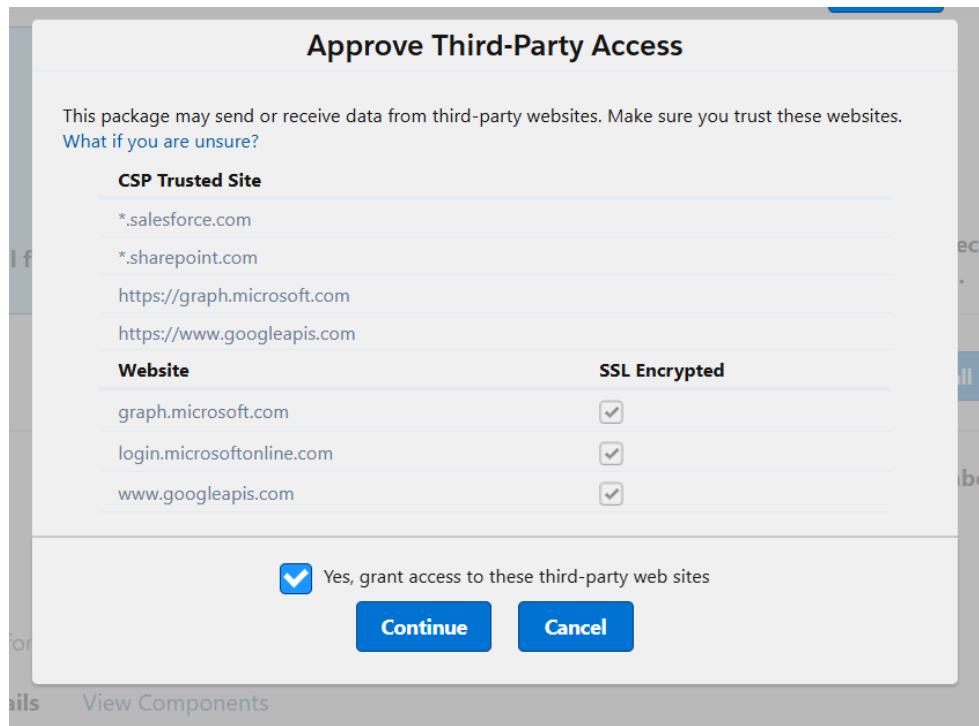
### 1. Installing the G-Link package

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)**

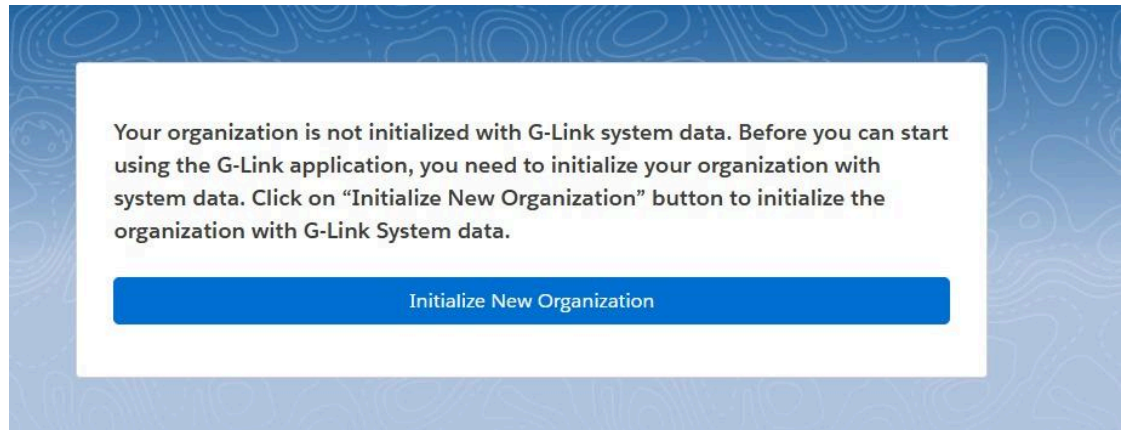
We are using visualforce pages to allow System Admin to configure G-Link from G-Link Administration. We open these visualforce pages as iframes in G-Link Administration. If iframes are blocked in your org, these configuration pages will not load. Please follow the steps in the **G-Link Iframes with Clickjack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

#### 3. **Initializing the application configuration**

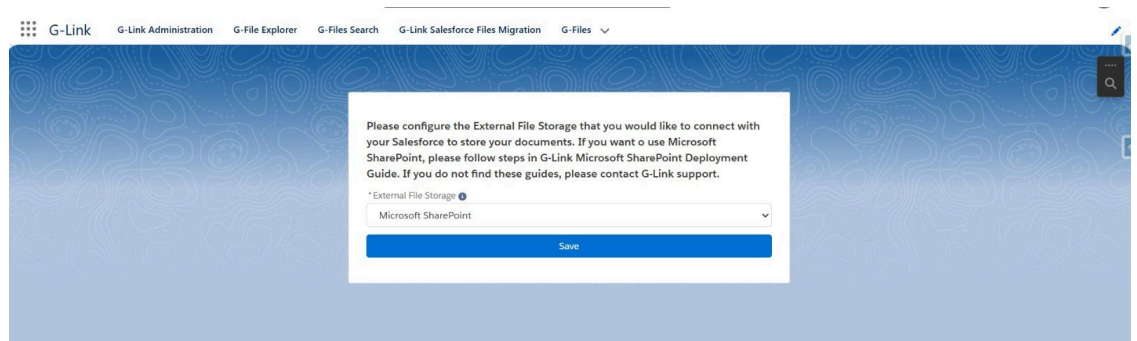
Once the G-Link package is installed, you need to initialize the application configuration.

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 **Microsoft SharePoint** for **External File Storage** and Click Save

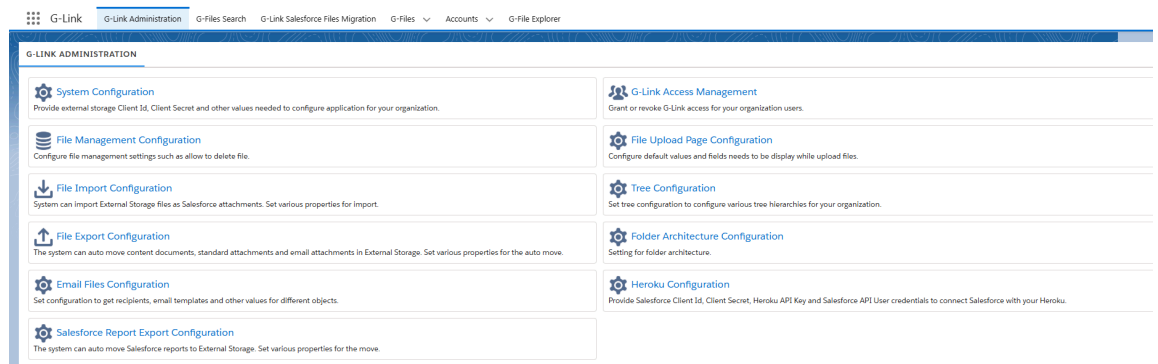


The application configuration is now initialized.

#### 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**



- Set the **Microsoft Client Id**, **Microsoft Secret Id** and **Microsoft Tenant Id** properties you get at the time of G-Link Microsoft SharePoint Sign Up. Click Save.

## 5. Manage SharePoint Drives

System Admin can link SharePoint Drives with 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 SharePoint Drives.

### 1. Link existing SharePoint Drives

Follow below steps to link existing SharePoint Drives

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

- If there are any drives available on SharePoint, 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.

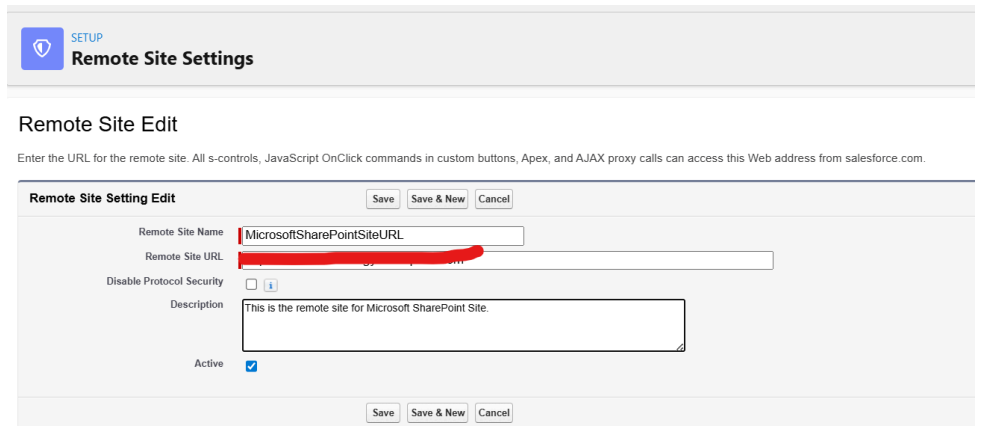
DRIVE NAME	SHARED DRIVE	DESCRIPTION	DEFAULT
<input type="checkbox"/> [Redacted]	✓	[Redacted]	<input type="radio"/>
<input checked="" type="checkbox"/> [Redacted]	✓	[Redacted]	<input checked="" type="radio"/>
<input type="checkbox"/> [Redacted]	✓	[Redacted]	<input type="radio"/>
<input type="checkbox"/> [Redacted]	✓	[Redacted]	<input type="radio"/>

- Click **Save**

## 2. Create Remote Site Setting for SharePoint Drive

Follow below steps to create Remote Site Setting for you SharePoint Drive

1. Go to **Setup > Remote Site Settings**
2. Click **New Remote Site**
3. Provide the **Remote Site Name** and **Remote Site URL** as below
  - a. Remote Site Name: **MicrosoftSharePointSiteURL**
  - b. Remote Site URL: {Your SharePoint URL which ends with sharepoint.com}
  - c. Description: **This is the remote site for Microsoft SharePoint Site.**
  - d. Active: **true**



The screenshot shows the 'Remote Site Edit' configuration page in Salesforce Setup. The page title is 'Remote Site Settings' with a 'SETUP' icon. Below the title, it says 'Remote Site Edit' and provides a note: '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.' The main form is titled 'Remote Site Setting Edit' and includes the following fields and controls:

- Remote Site Name:** Text input field containing 'MicrosoftSharePointSiteURL'.
- Remote Site URL:** Text input field with a red highlight.
- Disable Protocol Security:** A checkbox that is currently unchecked.
- Description:** Text area containing 'This is the remote site for Microsoft SharePoint Site.'
- Active:** A checkbox that is checked.

At the top right and bottom right of the form are buttons for 'Save', 'Save & New', and 'Cancel'.

4. Click **Save**

## 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**

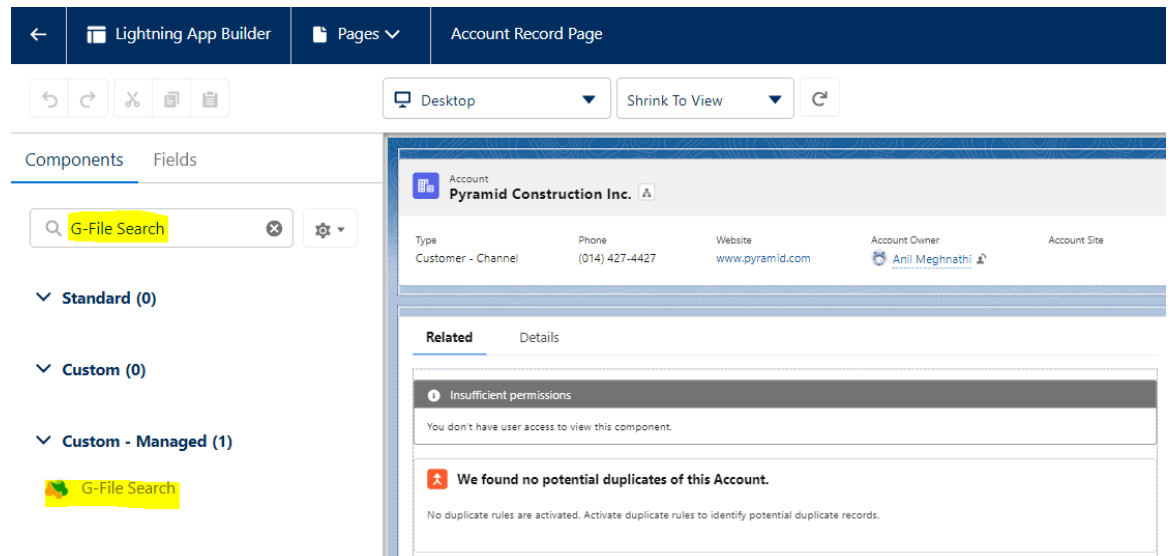
## 7. Configure G-Link for Salesforce objects (Optional)

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 SharePoint 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 SharePoint 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 **G-File Search** component in your Salesforce record detail page
6. Click **Save**