G-Link File Search Setup

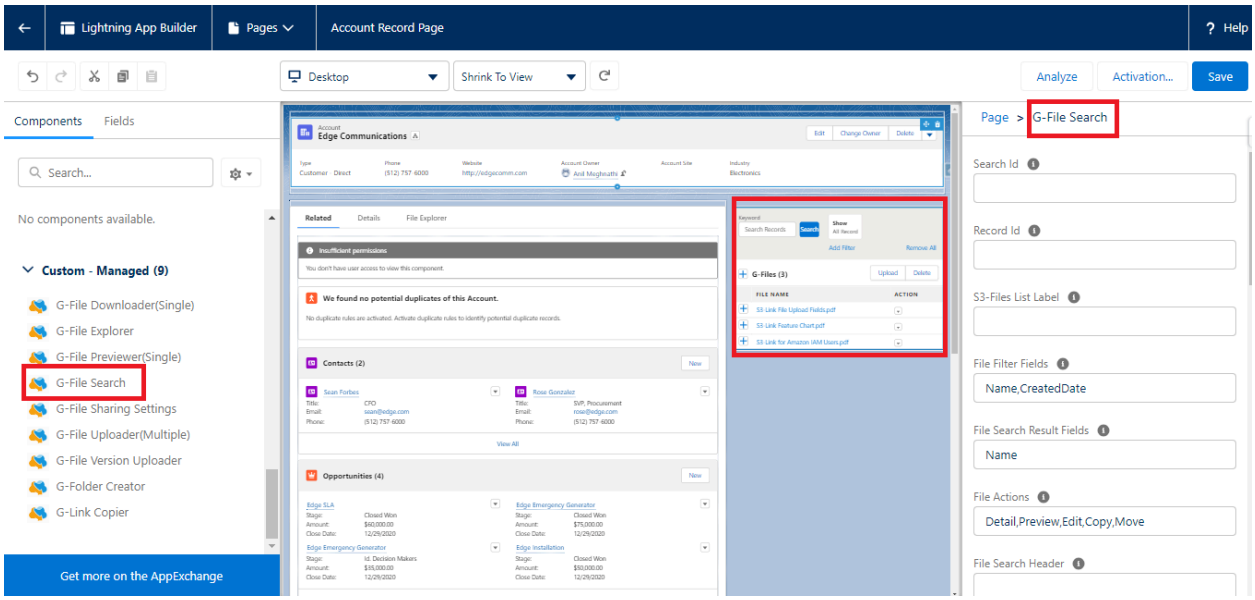
Introduction

This guide helps you enable various features in our G-Link File Search component so end users can use all those features.

Prerequisite

To enable our G-File Search component for your end users, you must add the **G-File Search** component in your Salesforce record detail page. For example, if you want to enable it in the Account record detail page, you can follow the steps below.

1. Go to the **Accounts** tab
2. Open one Account record
3. Click on **Setup**
4. Click on the **Edit Page**
5. Search for **G-File Search** in the components list
6. Drag & drop the **G-File Search** component to the account record detail page



7. This will enable G-File Search with the default settings. You can change the settings as per your requirements
8. Click **Save** and activate the page if required

Functionality Overview

There are a lot of other features which can be really useful. Below are some of those features with the steps you need to follow to enable them.

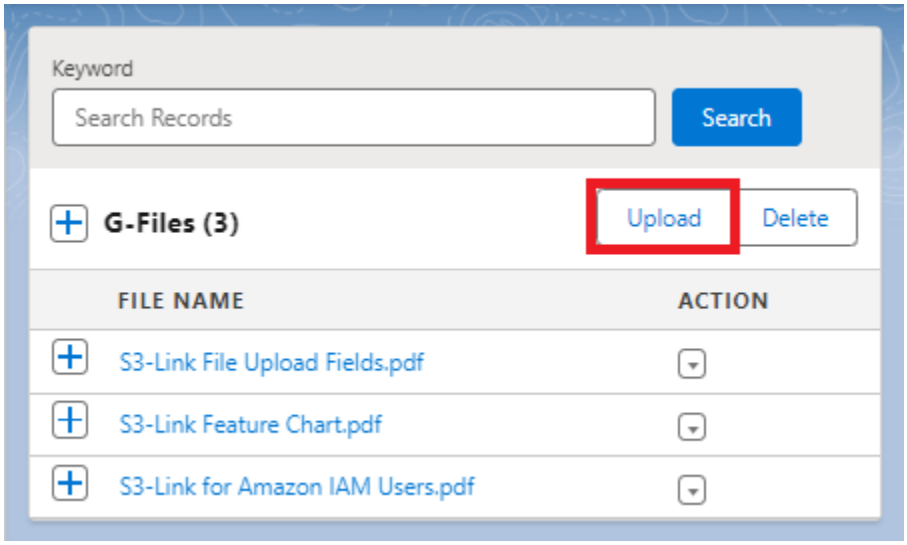
Enable File Upload

You can upload new files and attach them to the Salesforce record using G-File Search. Follow the below steps if you want to do that.

1. Follow steps 1 to 6 in Prerequisite.
2. Find the **Enable File Upload** property and set it to true. By default, it is already set to 'true'. If you want to disable it, simply uncheck the checkbox.

3. Click **Save** & activate the page if required

Note: After saving, users will see the **Upload** button in the G-File Search. See the below screenshot.



Open G-File details on click of G-File Name

You will get the G-File details on the click of the G-File Name. After clicking, the file will open in the other tab. Follow the below steps if you want to do that.

1. Follow steps 1 to 6 in Prerequisite.
2. Find the **Open File Detail(on file name click)** property and set it to true.

3. Click **Save** & activate the page if required

Note: After saving, when users click on the file name link, the file details will open.

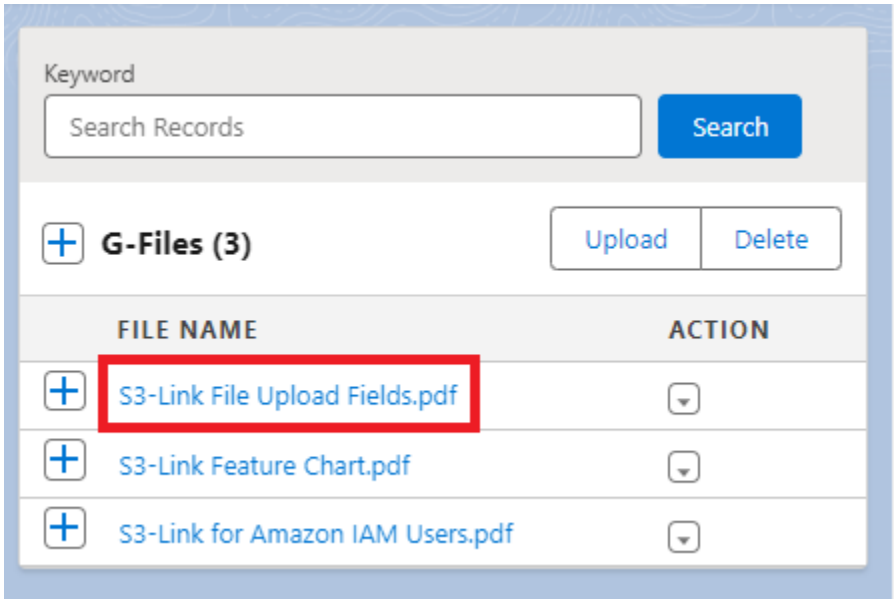
Open Preview on click of G-File Name

You can preview any file that is displayed in the G-Files list. Follow the below steps if you want to do that.

1. Follow steps 1 to 6 in Prerequisite.
2. Find **the Open File Preview(on file name click)** property and set it to true.

3. Click **Save** & activate the page if required

Note: After saving, when users click on the file name link, the file preview will be loaded.

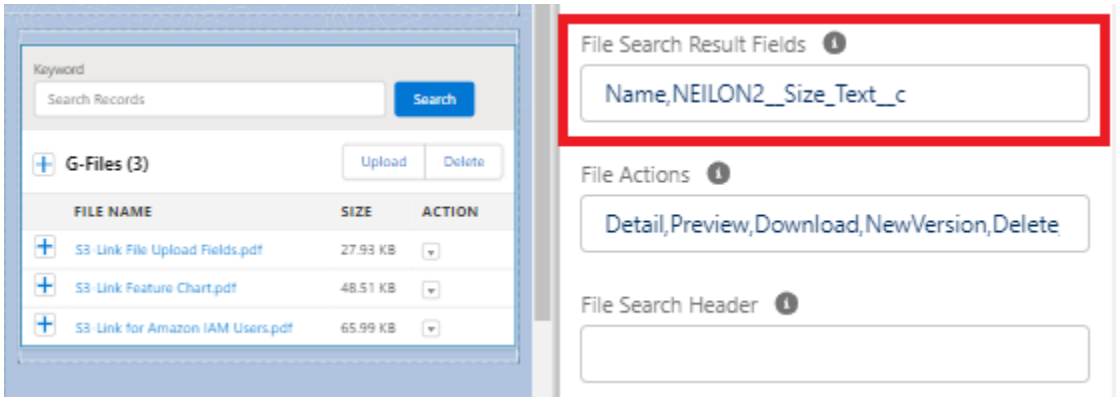


Show additional G-File fields as column

You can add additional fields of the G-File as columns in the G-File Search component to get information about those fields. Follow the below steps if you want to do that.

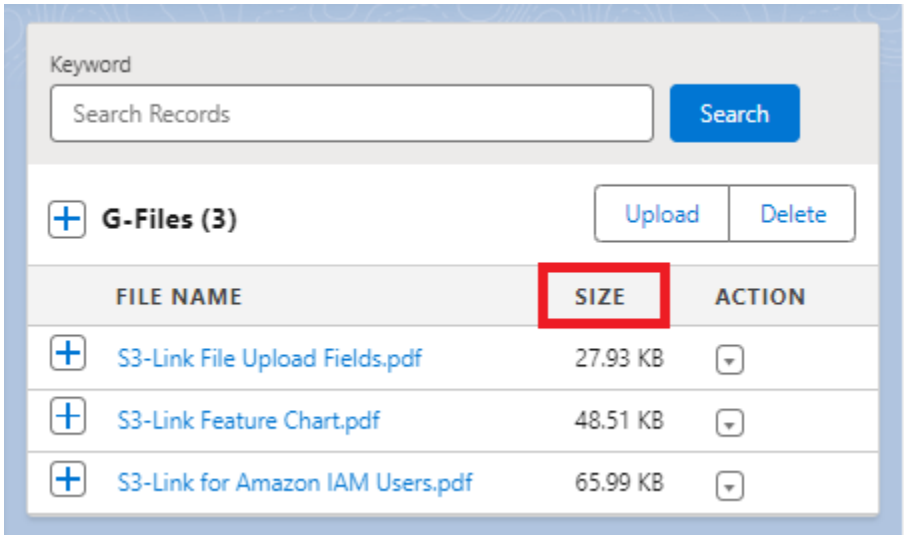
1. Follow steps 1 to 6 in Prerequisite
2. Find **File Search Result Fields** property
3. Give comma separated API names of G-File fields that you want to display as columns. It supports all G-File fields.

4. For example, if you want to display Name, Size as the columns, provide **Name,NEILON2__Size_Text__c**



5. Click **Save** and activate the page if required

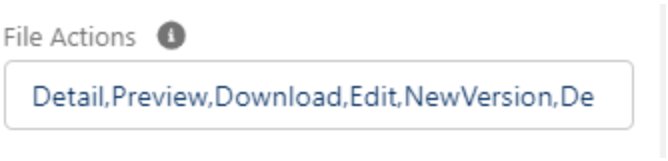
Note: After saving, users will see the column you enabled in the G-File Search. See the below screenshot.



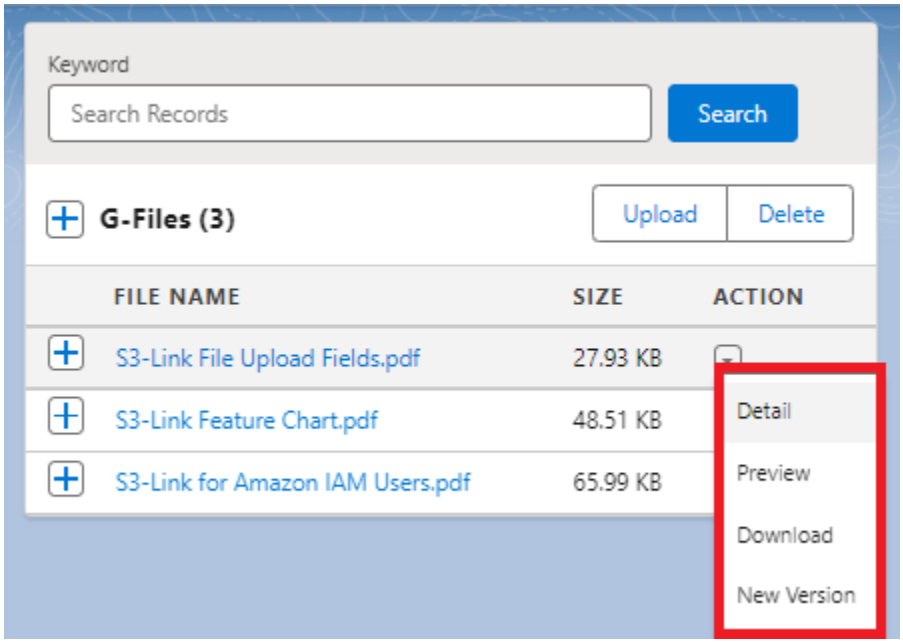
Enable / Disable File Actions

You can perform certain actions on files in the G-File Search component. By default, some actions are available, but if you want to add or remove actions, follow the below steps

1. Follow steps 1 to 6 in Prerequisite.
2. Find the **File Actions** property of the component
3. Give comma separated action names in the **File Actions** property. It supports the actions below. Detail,Preview,Download,Edit,NewVersion,Delete,Copy,Move



Note: After saving, users will see File Actions you enabled in the G-File Search. See the below screenshot.

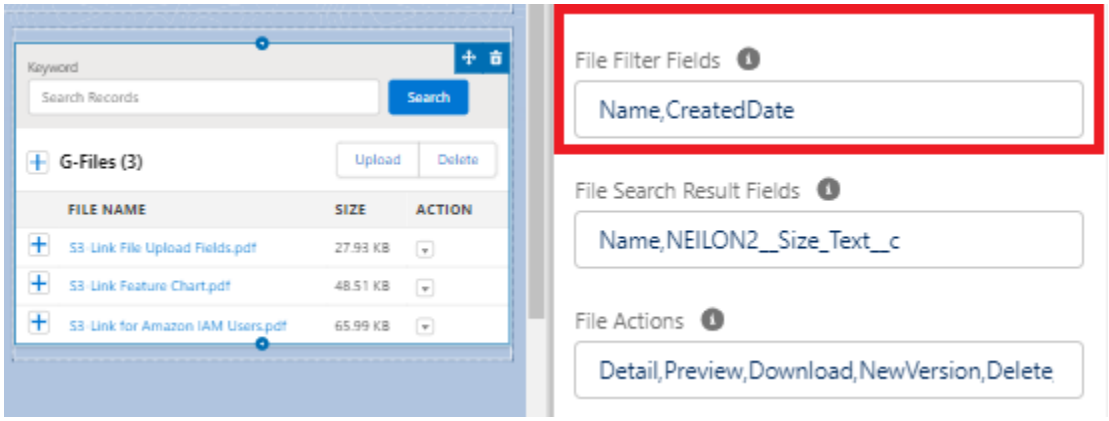


Enable Filter Capability

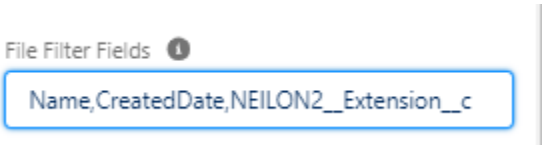
We have features to filter files based on criteria in the G-File Search component. If you have many files and need to search efficiently, this filtering capability is invaluable. Follow the below steps if you want to do that.

1. Follow steps 1 to 6 in Prerequisite.
2. Find the **Enable Filters** property of the component.
3. Set true for Enable Filters

4. Additionally, you can apply additional filters by configuring specific settings. By default, you can filter files based on File Name and Created Date, which are included in the **File Filter Fields**.

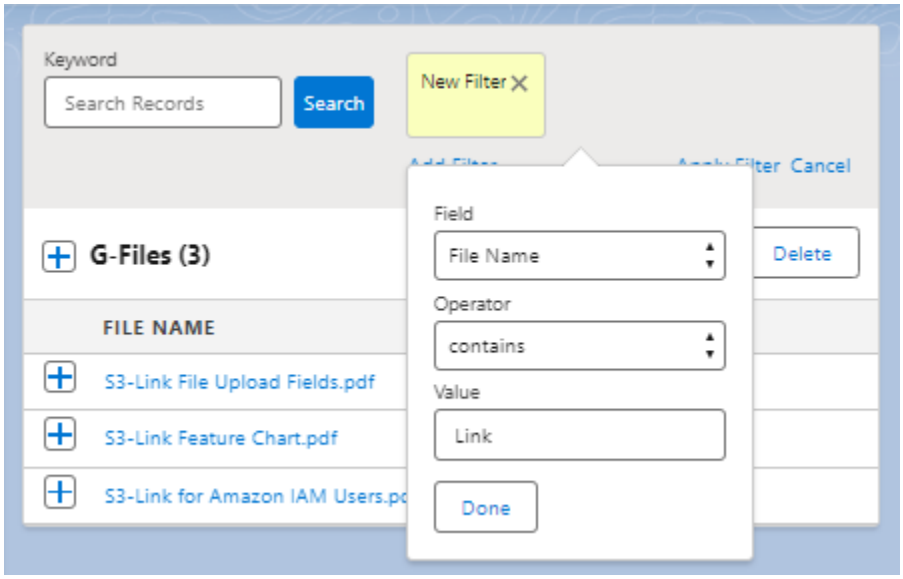


5. You can add fields to the File Filter Fields based on your preferences for filtering. Simply add the API names separated by commas. For example: Name, CreatedDate, NEILON2__Extension__c, NEILON2__Size_Text__c



6. Click **Save** & activate the page if required

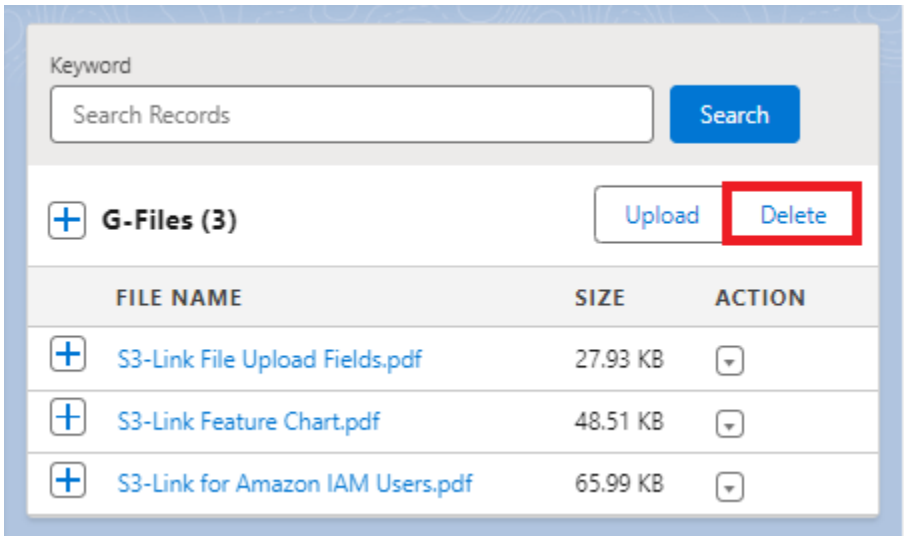
Note: After saving, users will see the option to add filters in the G-File Search. See the below screenshot.



Enable Multiple File Delete

You can delete multiple files, follow the below steps if you want to do that.

1. Follow steps 1 to 6 in Prerequisite.
2. After that click on the G-File Search component. On the right side, you will see all the settings available for the component.
3. Find the **Enable Multiple Files Delete** property and set it to true.

4. Click **Save** & activate the page if required

Note: After saving, users will see the Delete button in the G-File Search. See the below screenshot.