G-Link File Search User Guide

Introduction

You can use our G-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, and New Version. Your System Admin can also enable some custom actions as well.

Prerequisite

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

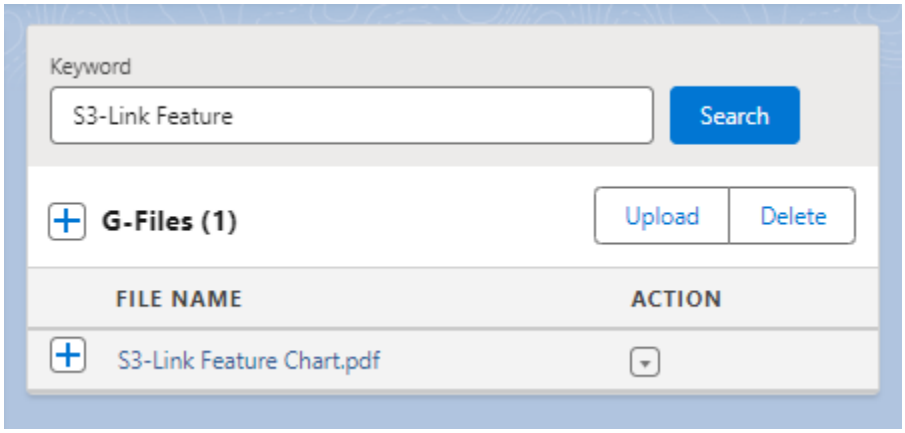
Functionality Overview

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 G-Files related to the Salesforce record. You can also search the G-Files by keyword in the Name. Follow the below steps for that.

1. Open Account record detail
2. Find G-File Search
3. Type the keyword in the search box and click **Search**
4. G-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 **G-Link File Search Setup**

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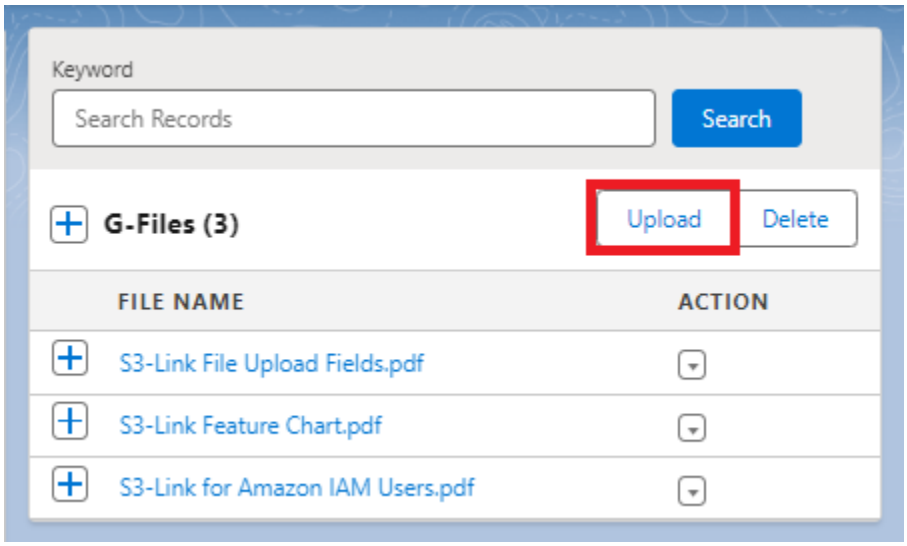
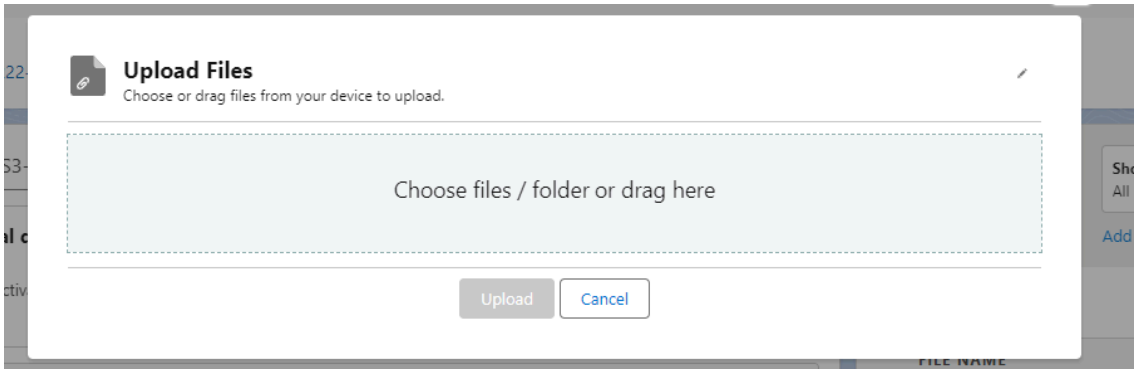
Upload New Files

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

1. Open Account record detail
2. Find G-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 G. Once files are uploaded in G, you will see those files in the list of G-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 **G-Link File Search Setup**

Download & Preview G-File

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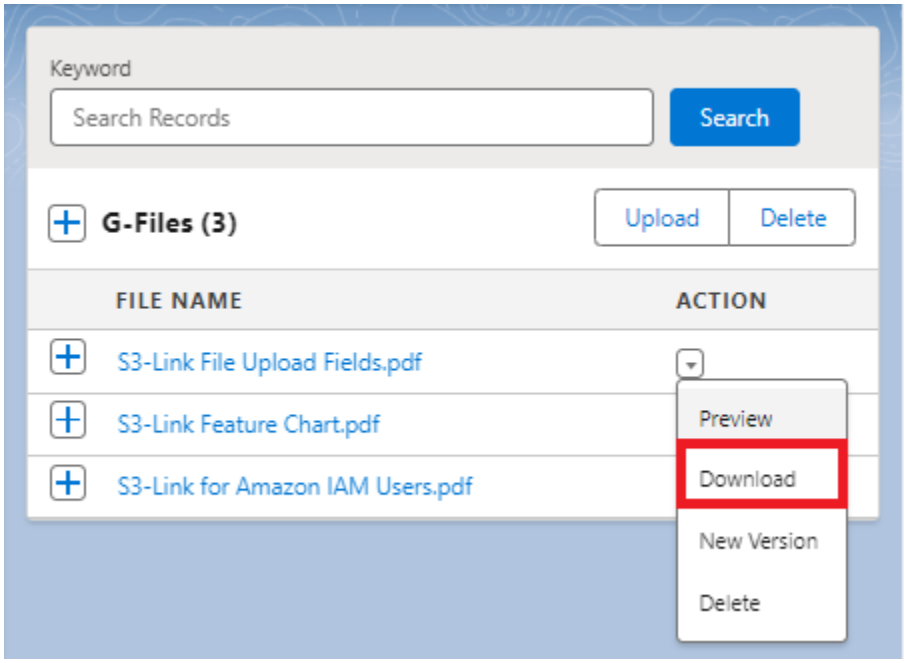
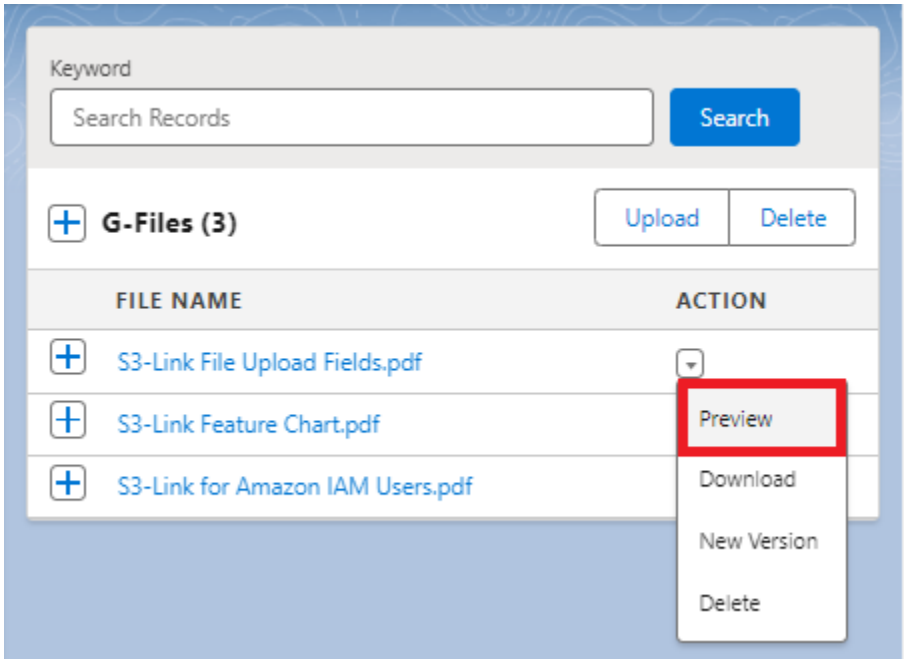
You can download and preview any file that is displayed in the G-Files list. Follow the below steps for that.

1. Open Account record detail
2. Find the G-File Search
3. Click the menu for the G-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



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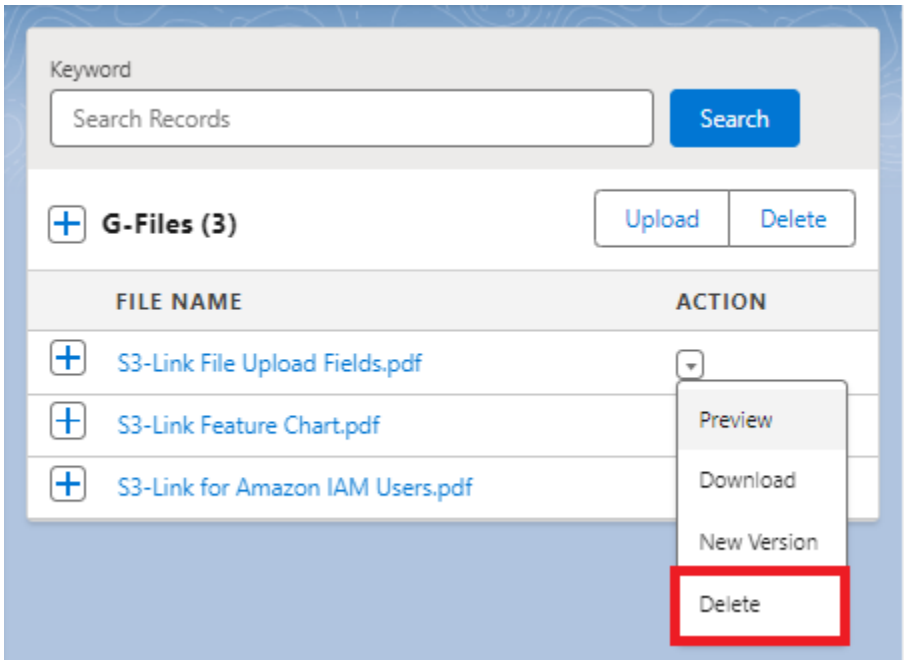
Note: If you do not see the Download & Preview actions for G-Files, please contact your System Admin and request to enable them by following steps in the **G-Link File Search Setup**

Delete G-File

You can delete any file from the G-Files list. The files deleted via this will go into G-Link Recycle Bin if enabled. Follow the below steps for that.

1. Open Account record detail
2. Find the G-File Search
3. Click the menu for G-File which you want to delete
4. Click **Delete** from the menu for the G-File you want to delete



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

Upload New File Version

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

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

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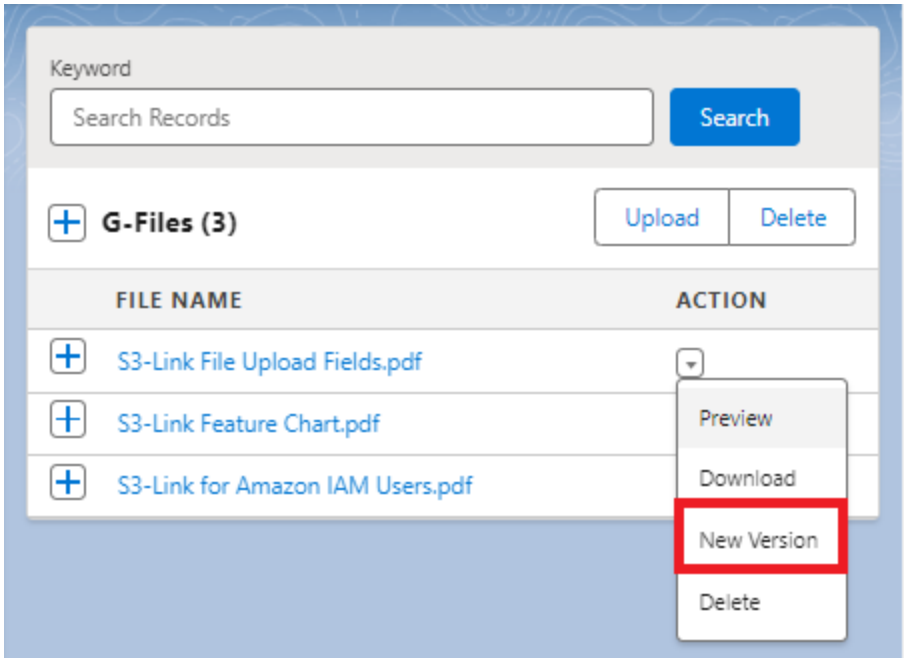
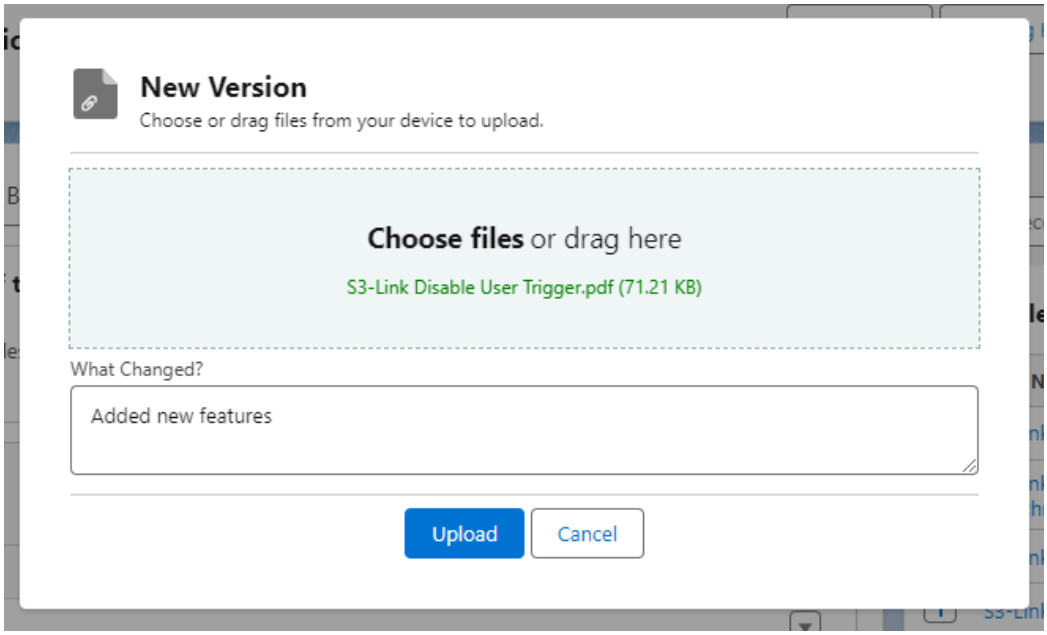


4. Click on **Choose files** and select the updated file which you want to upload as new version
5. Specify the changes made from the previous version in the **What Changes?**
6. Click **Upload** and this will upload the selected file as a new version



Notes:

- Follow the steps in the guide G-Link Download & Preview File Version to download or view a specific file version of the G-File record.
- If you do not see the New Version action for G-Files, please contact your System Admin and request to enable this by following steps in the G-Link File Search Setup

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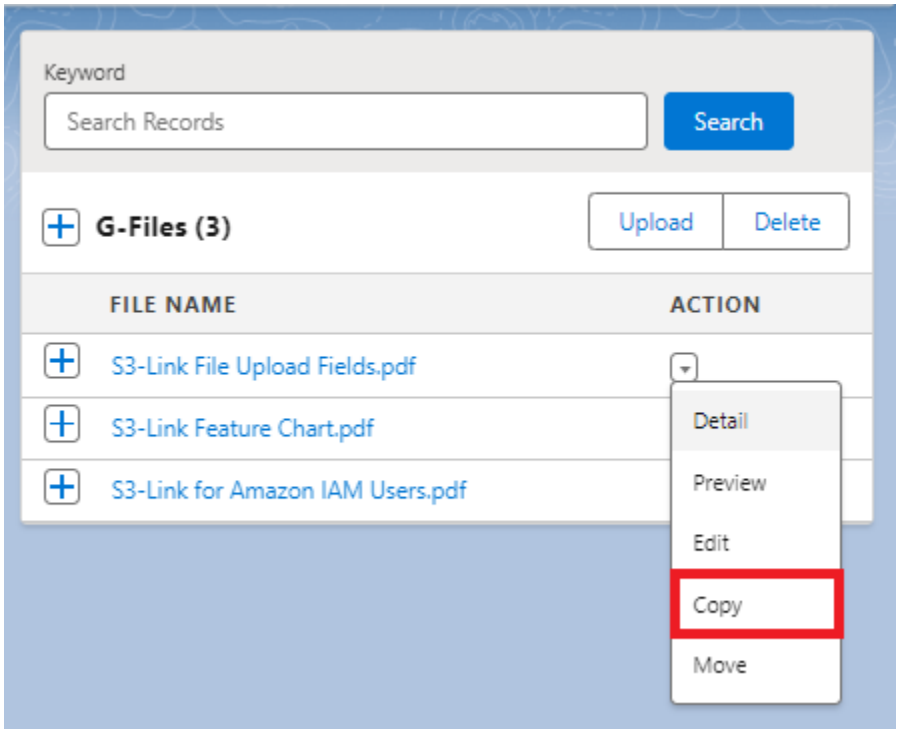
Copy File

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 G-File Search
3. Click **Copy** from the menu for the G-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**

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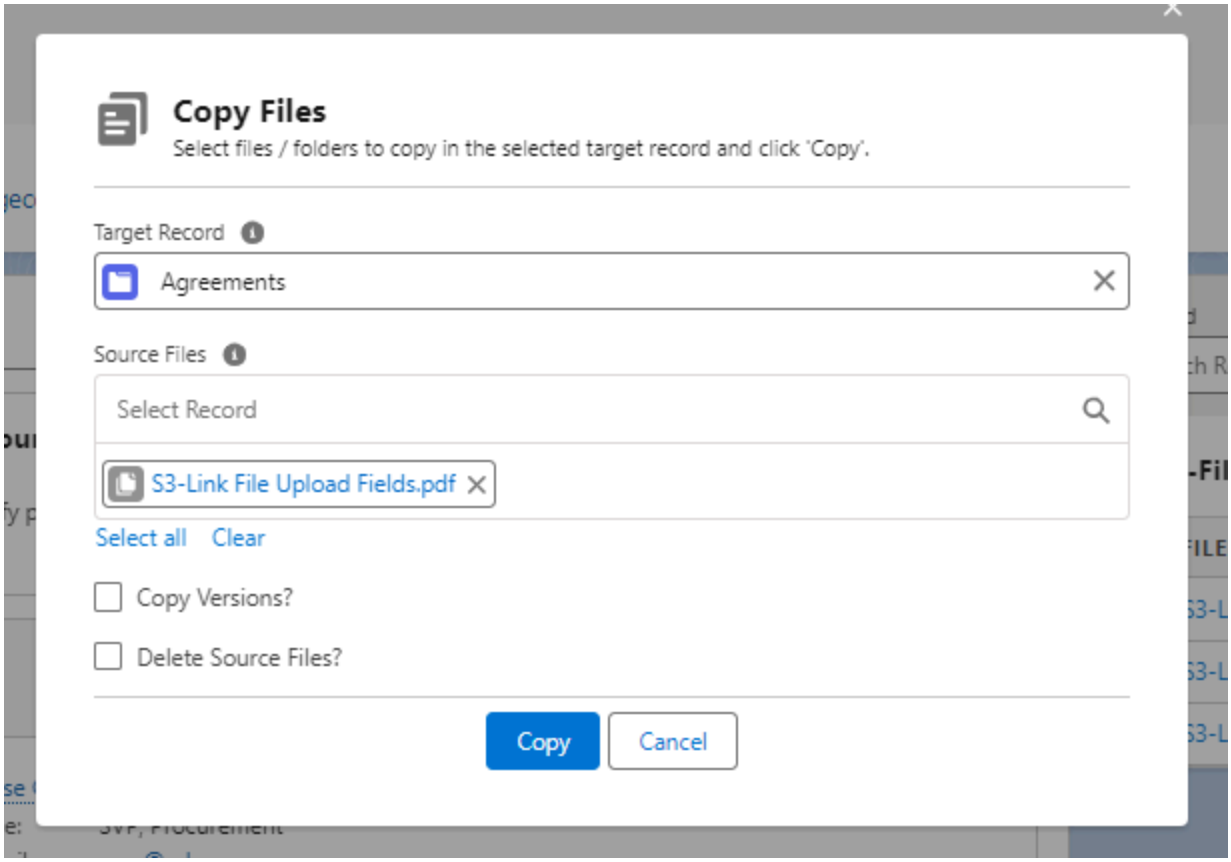

6. If you want to copy all file versions along with the file then set the **Copy Versions?** checkbox to true
7. If you want to delete source files after copy then set the **Delete Source Files?** checkbox to true
8. Click **Copy** and the file will be copied to the target folder

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

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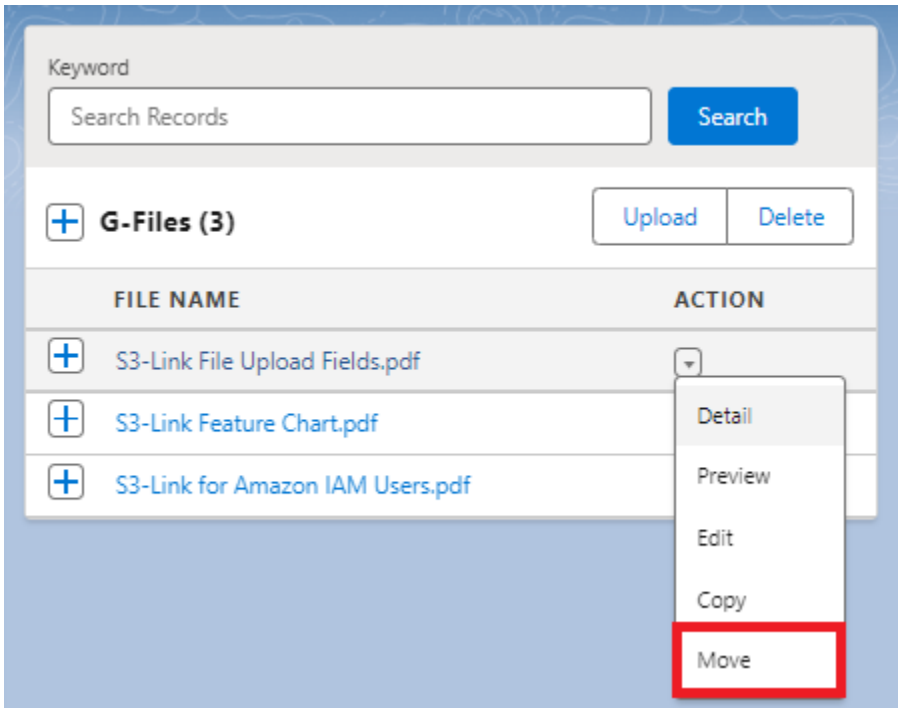
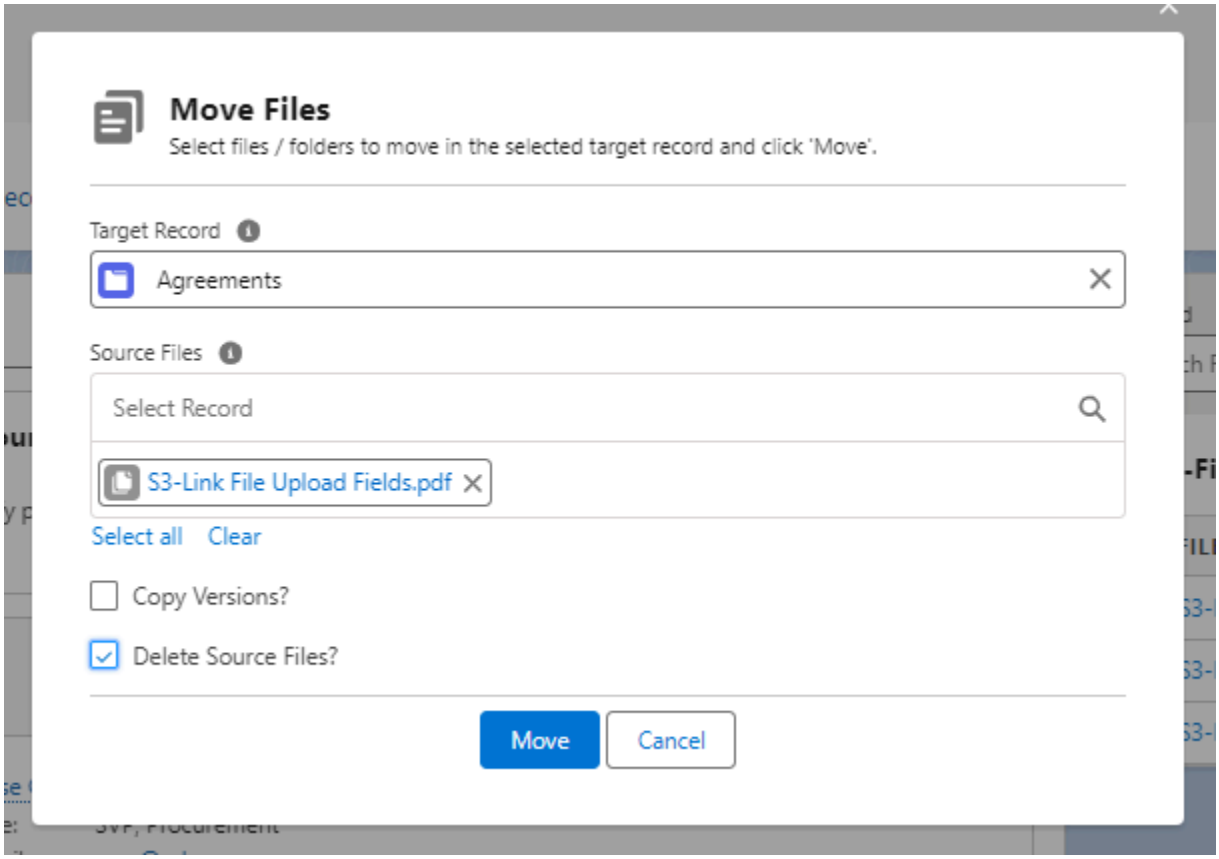
3. Click **Move** from the menu for the G-File which you want to move into another folder



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**



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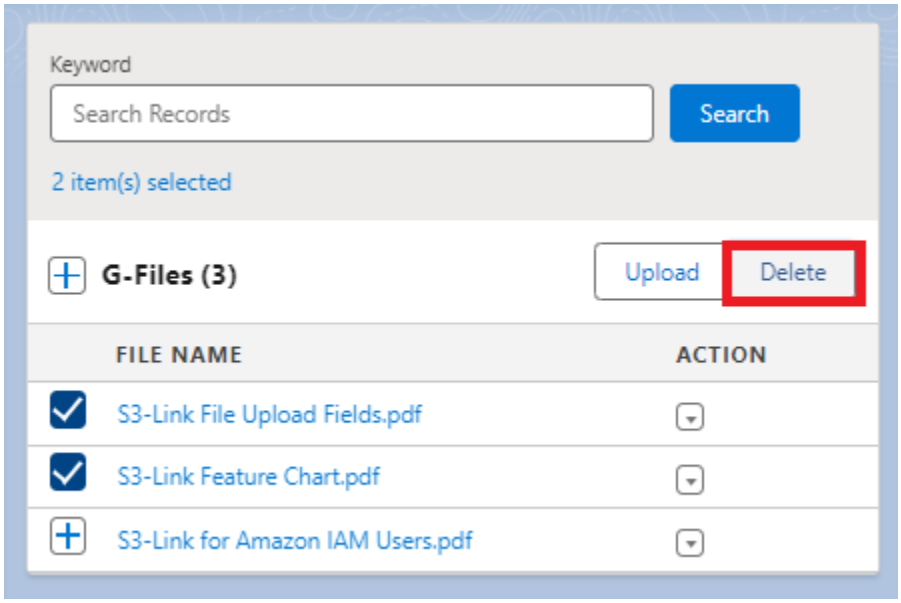
6. If you want to copy all file versions along with the file then set the **Copy Versions?** checkbox to true
7. Click **Move** and the file will be moved to the target folder

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

Multiple Files Delete

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

1. Open Account record detail
2. Find the G-File Search component
3. Select G-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 G**-Link File Search Setup**

Filter Files using Criteria

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

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

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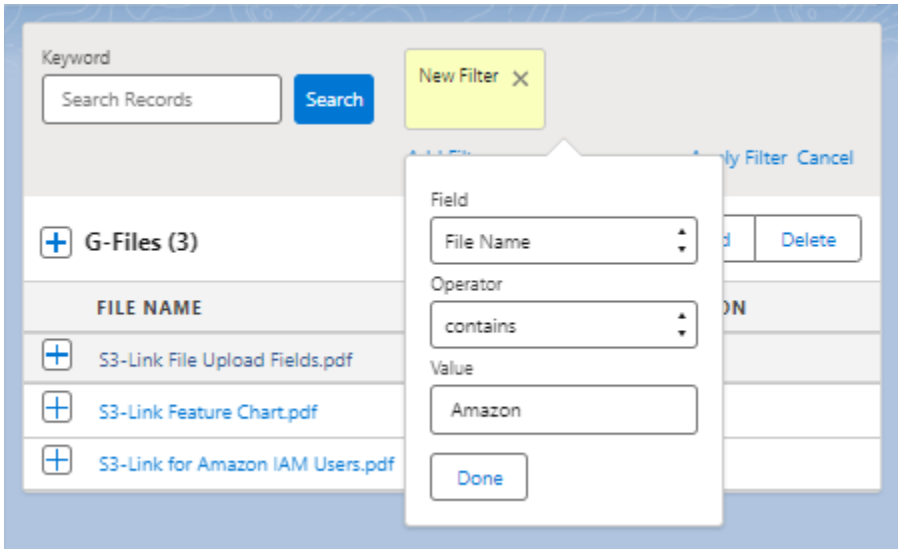
3. Click on **Add Filter**. Select the Field, Operator and their Value. Click on **Done**.



4. You can add multiple filters like this.
5. Click **Apply Filter**. It will display G-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 **G-Link File Search Setup**

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