G-Link Related Email Attachments User Guide

Introduction

When auto transfer of Salesforce Files & Email Attachments into Google Drive is enabled, it can be challenging to distinguish which files are related to Salesforce records and which are related to email messages. This component addresses this issue by allowing users to see email messages with their attachments stored in Google Drive. This simplifies the identification of email attachments.

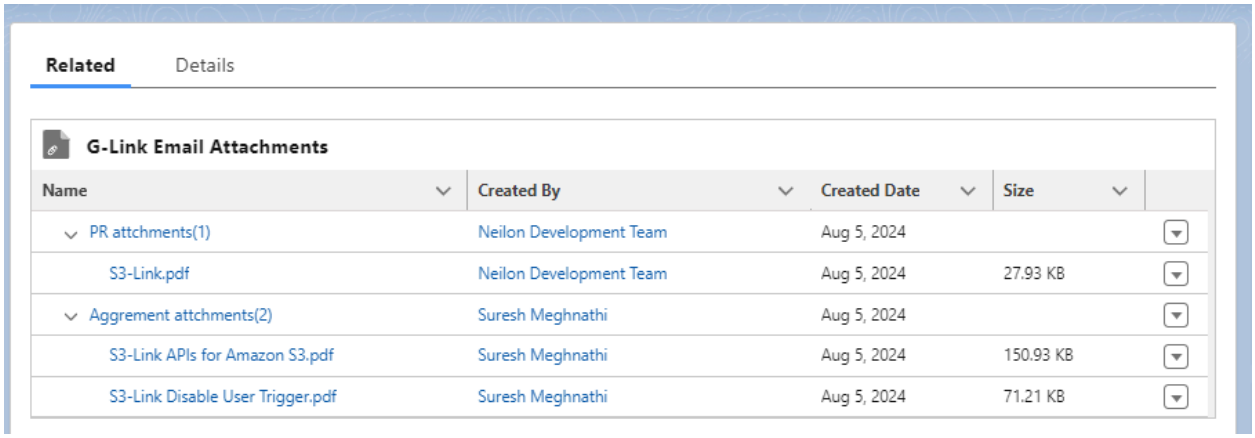
Prerequisite

Your system administrator must add the G-Link Related Email Attachments component in your Salesforce record detail page.

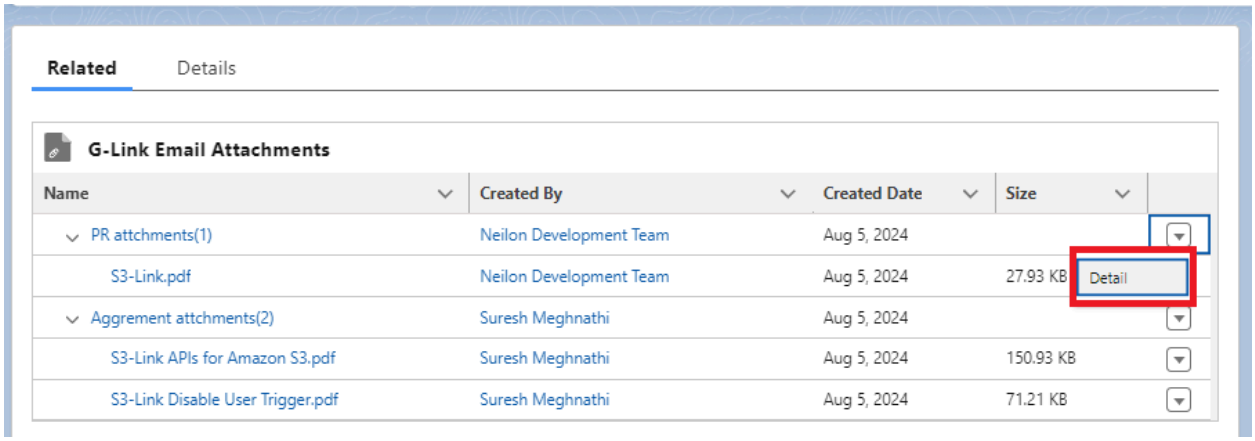
Functionality Overview

Let's see how you can use this. Follow the steps below. In this guide, we have covered it for Case records. But you can use it for any other Salesforce records.

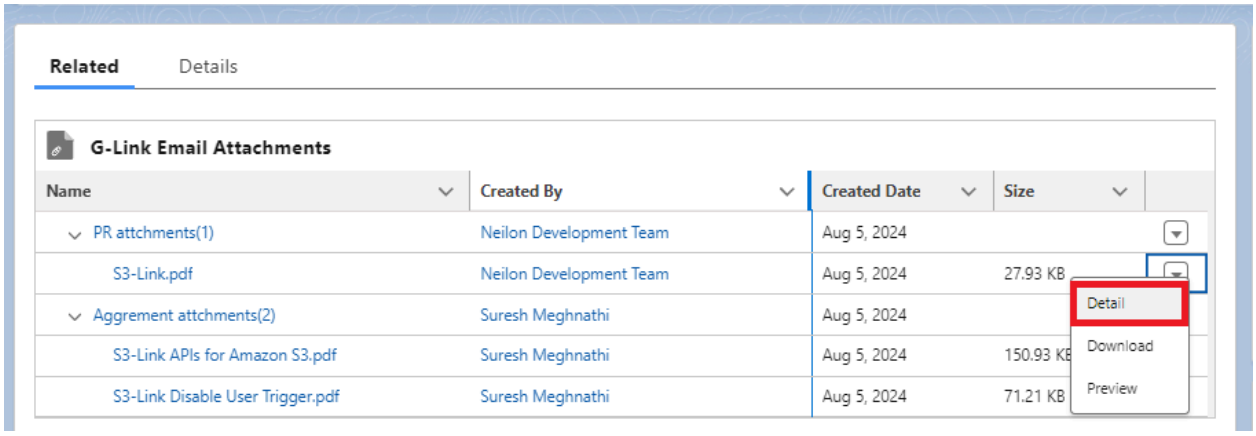
1. Navigate to the case record which has few email messages with attachments which are migrated in Google Drive.
2. Open the **Related** section and you will see the **G-Link Email Attachments** section.
3. You will see a list of email messages related to the case. You can expand the email message and it will display its email attachments with details below.
    a. Name: Name of the email attachment.
    b. Created By: The user who sent the email.
    c. Created Date: Date & time when email was sent.
    d. Size: Displays the size of the email attachment.



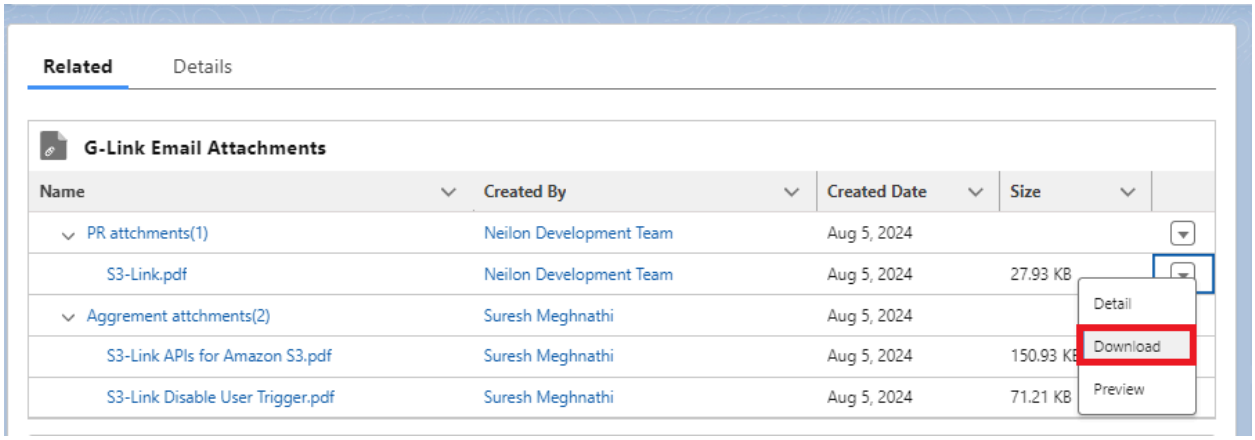
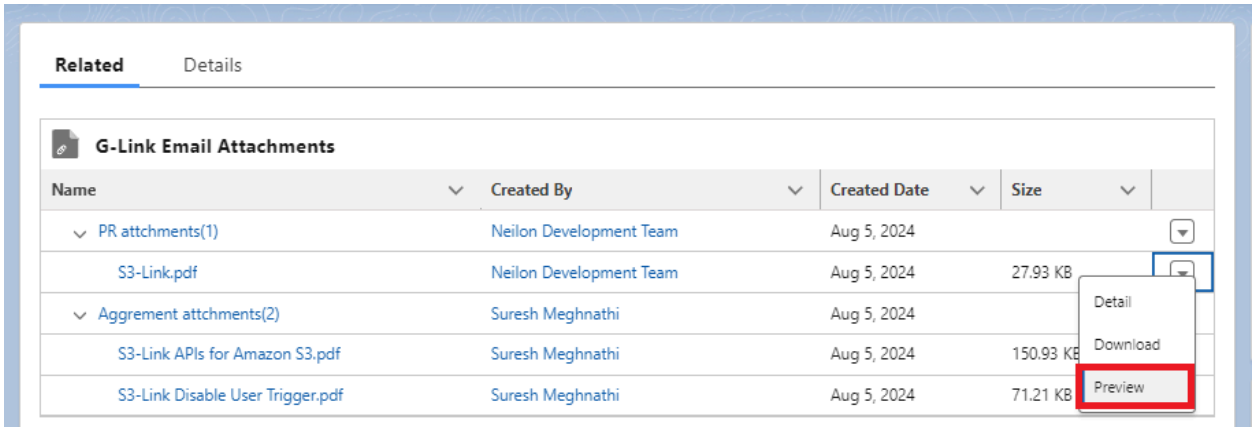
4. If you want to see Email Message detail, click the Detail from the menu of the email message.



5. If you want to see G-File detail, click the Detail from the menu of email attachment.



6. If you want to download the email attachment, click Download from the menu for G-File which you want to download. This will download G-File in your local drive.



7. If you want to preview the email attachment, click Preview from the menu for G-File which you want to preview. This will load the G-FIlein Salesforce.