G-Link Salesforce Custom Objects Setup

Introduction

This is the guide to enable attach files for the Salesforce custom objects. Follow below steps to configure it. Once you will configure it, you will see the related list for G-Files in page layouts for those custom objects. From there users can attach and delete files related to that record.

We have added lookup fields for standard objects. So you won't have to create lookup fields for those objects. Here is the list of standard objects for which you won't need to create lookups.

1. Account
2. Asset
3. Campaign
4. Case
5. Contact
6. Contract
7. Event
8. Lead
9. Opportunity
10. Product2
11. Solution
12. Task

If you want to enable it for any custom objects, follow below steps.

Create lookup field in "G-File" object

Switch to Salesforce Classic and follow steps below to create a lookup for the custom object in G-File.

1. Go to Setup > Create > Objects > G-File
2. Go to **Custom Fields & Relationships** Section, click **New**
3. Select **Lookup Relationship** and **Next**

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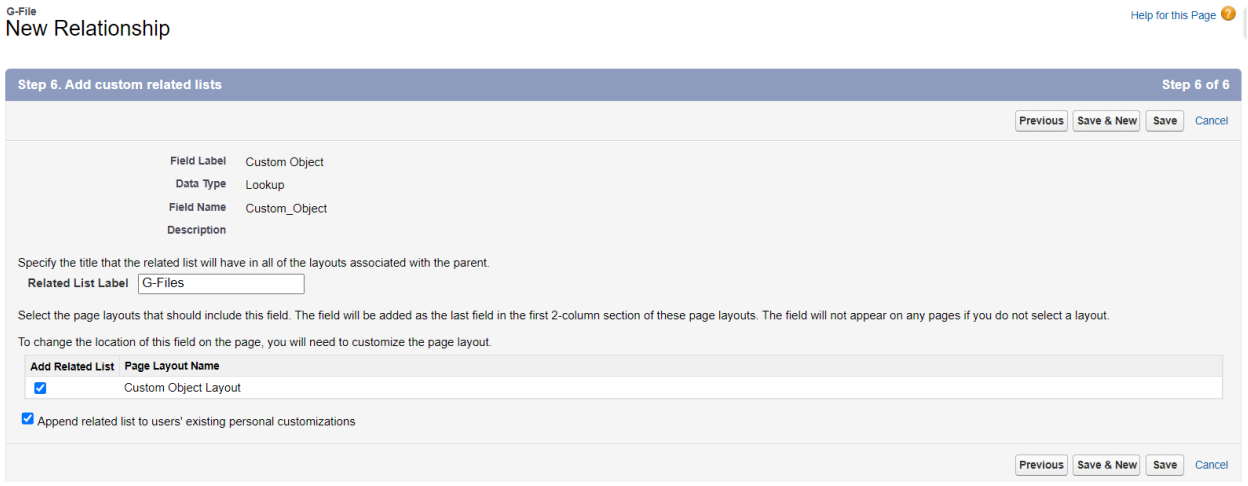
4. Select Object Name as Related To object and **Next**

5. Give Field API Name and **Next**. Make sure the field API name is the same as the custom object API name. If the custom object API name has a namespace prefix(i.e pse__), remove that name space in the lookup field API name.

6. Make it visible for all required profiles and **Next**
7. Add into File page layout if required and **Next**
8. Provide related list name **G-Files** and add it on page layout



9. Click **Save**

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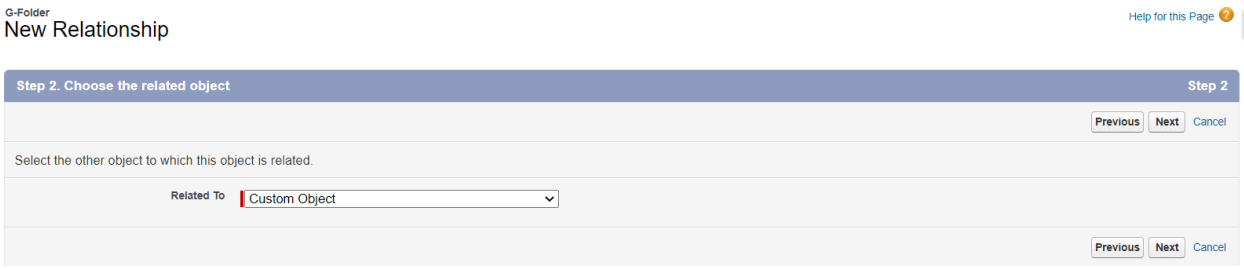
Create lookup field in “G-Folder” object

Switch to Salesforce Classic and follow steps below to create a lookup for the custom object in G-Folder.

1. Go to Setup > Create > Objects > G-Folder
2. Go to **Custom Fields & Relationships** Section, click **New**
3. Select **Lookup Relationship** and **Next**
4. Select Object Name as Related To object and **Next**



5. Give Field API Name and **Next**. Make sure the field API name is the same as the custom object API name. If the custom object API name has a namespace prefix(i.e pse__), remove that name space in the lookup field API name.

6. Make it visible for all required profiles and **Next**
7. Add into File page layout if required and **Next**

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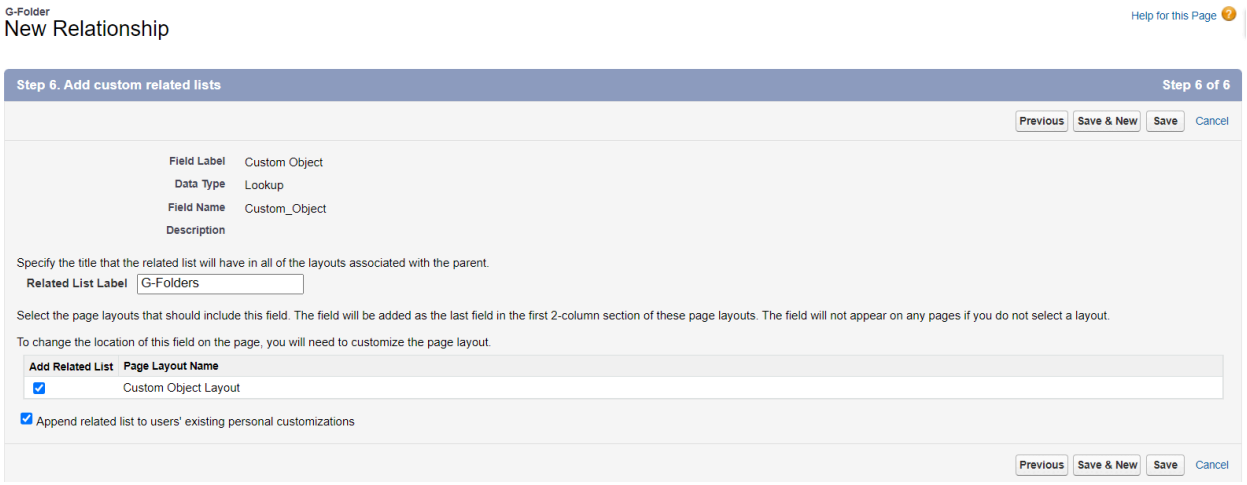
8. Provide related list name **G-Folders** and add it on page layout



9. Click **Save**

Add related list for G-Files in Custom Object page layout

Switch to Salesforce Classic and follow below steps to enable Files in custom object detail.

1. Go to Setup > Create > Objects > Custom Object
2. Go to the **Page Layouts** section.
3. Edit page layout in which you want to add related list for G-Files
4. Go to the Related List section. Search for **G-Files**

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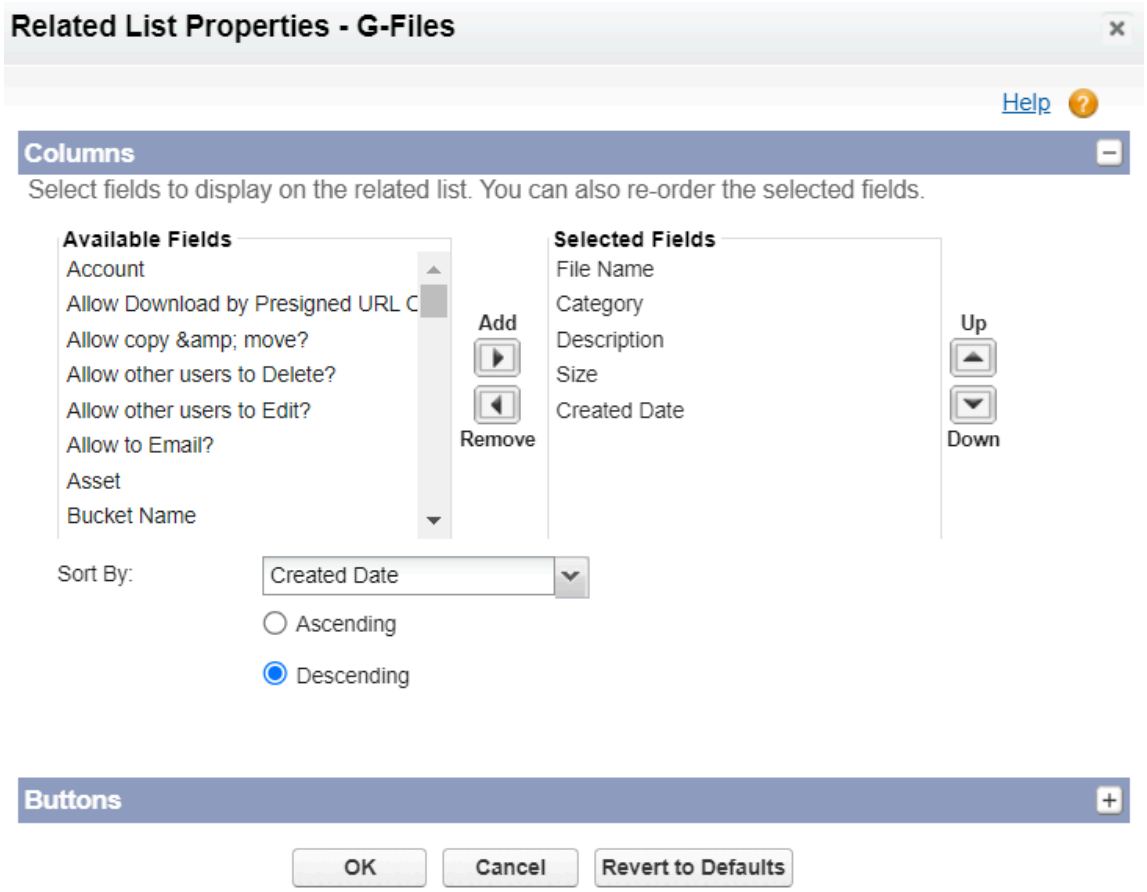
5. Configure the columns you want to display in related list



6. Remove standard New and Change Owner button. Also remove all buttons from the related list.
7. Click **Save**

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