

S3-Link for Salesforce Custom Objects

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 S3-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 "S3-File" object

Switch to Salesforce Classic and follow steps below to create a lookup for the custom object in S3-File.

1. Go to Setup > Create > Objects > S3-File
2. Go to **Custom Fields & Relationships** Section, click **New**
3. Select **Lookup Relationship** and **Next**

4. Select Object Name as related object and **Next**

File
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

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.

File
New Relationship

Step 3. Enter the label and name for the lookup field

Field Label [i](#)

Field Name [i](#)

Description

Help Text [i](#)

Child Relationship Name [i](#)

Required Always require a value in this field in order to save a record

What to do if the lookup record is deleted?
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.

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 **S3-Files**

9. Uncheck all the checkboxes for Add Related List column

File Help for this Page

New Relationship

Step 6. Add custom related lists Step 6 of 6

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label	Custom Object
Data Type	Lookup
Field Name	Custom_Object
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Custom Object Layout

Append related list to users' existing personal customizations

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

10. Click **Save**

Create lookup field in “S3-Folder” object

Switch to Salesforce Classic and follow steps below to create a lookup for the custom object in S3-Folder.

1. Go to Setup > Create > Objects > S3-Folder
2. Go to **Custom Fields & Relationships** Section, click **New**
3. Select **Lookup Relationship** and **Next**
4. Select Object Name as related 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.

Folder
New Relationship

Step 3. Enter the label and name for the lookup field

Field Label

Field Name

Description

Help Text

Child Relationship Name

Required Always require a value in this field in order to save a record

What to do if the lookup record is deleted? Clear the value of this field. You can't choose this option if you make this field required.

Don't allow deletion of the lookup record that's part of a lookup relationship.

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 **S3-Folders**
9. Uncheck all the checkboxes for Add Related List column

Folder
New Relationship

Help for this Page

Step 6. Add custom related lists

Field Label Custom Object
Data Type Lookup
Field Name Custom_Object
Description

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List Page Layout Name
 Custom Object Layout

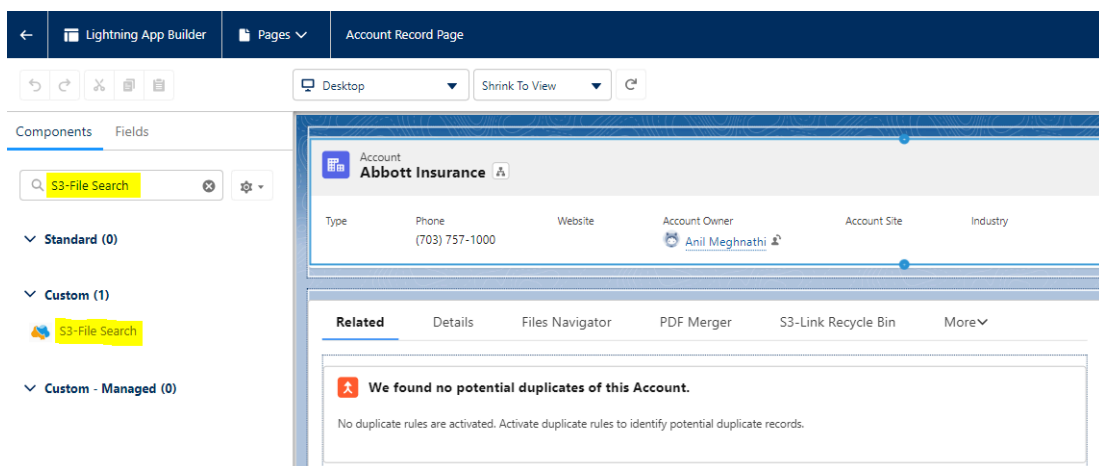
Append related list to users' existing personal customizations

10. Click **Save**

Add S3-File Search component in the Custom Object Record detail pages

In order to allow end users to attach files to Salesforce records, you will have to add our S3-File Search component in your Salesforce record detail pages. S3-File Search component will display a list of all S3-Files attached to the Salesforce record and it will also allow users to upload new files. Follow below steps to add our S3-File Search component in the Salesforce record pages.

1. Open the record list(list view) of the custom object for which you want to enable attaching S3-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 S3-File Search in Components section



5. Drag & drop our our **S3-File Search** component in your Salesforce record detail page
6. Click **Save**

Add S3-Link buttons for Custom Object(optional)

This is optional. If you do not want to use the above S3-File Search component and instead want to use the S3-Files related list in your page layouts then only you should perform these steps. Otherwise you can skip this. There are some limitations with the standard **New** button. So contact S3-Link support team to create a custom button for file upload from the custom object detail page.

Also other buttons like File Explorer, Import Files etc are designed to work for standard objects. They won't work for custom objects. So if you want to use any of those buttons, you will have to create similar buttons for the custom object. Contact S3-Link Support for that.

Add related list for S3-Files in Custom Object page layout(optional)

This is optional. If you are using the S3-File related list in your page layouts then only you should perform these steps. Otherwise you can skip this. 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 S3-Files
4. Go to the Related List section. Search for **S3-Files**
5. If do not find, add **S3-Files** related list
6. Configure the columns you want to display in related list

Related List Properties - S3-Files [x]

[Help](#) ?

Columns [-]

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields		Selected Fields
Allow Download by Presigned URL	Add ▶	Name
Allow copy & move?		Size
Allow other users to Delete?	Remove ◀	Created Date
Allow other users to Edit?		
Amazon File Key		
Asset		
Bucket Name		
Bucket Region		

Sort By: Created Date ▼

Ascending

Descending

Buttons [+]

OK Cancel Revert to Defaults

7. Open Buttons section. Uncheck New and Change Owner. Remove all buttons.
8. Click **Save**