

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 below steps to create lookup for 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 Custom Object

5. Give Field API Name and **Next**. Make sure field API name is same as custom object API name.

File
New Relationship

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

Field Label Custom Object

Field Name Custom_Object

Description

Help Text

Child Relationship Name Files

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** and add it on page layout

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 Files

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

9. Click **Save**

Create lookup field in “S3-Folder” object

Switch to Salesforce Classic and follow below steps to create lookup for 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 field API name is same as custom object 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** and add it on page layout

Folder
New Relationship

Help for this Page ⓘ

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
 Custom Object Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

9. Click **Save**

Add related list for 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 **Page Layouts** section.
3. Edit page layout for which you have add related list for Files
4. Go to Related List section. Search for **S3-Files**
5. Configure the columns you want to display in related list

Related List Properties - S3-Files

[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		

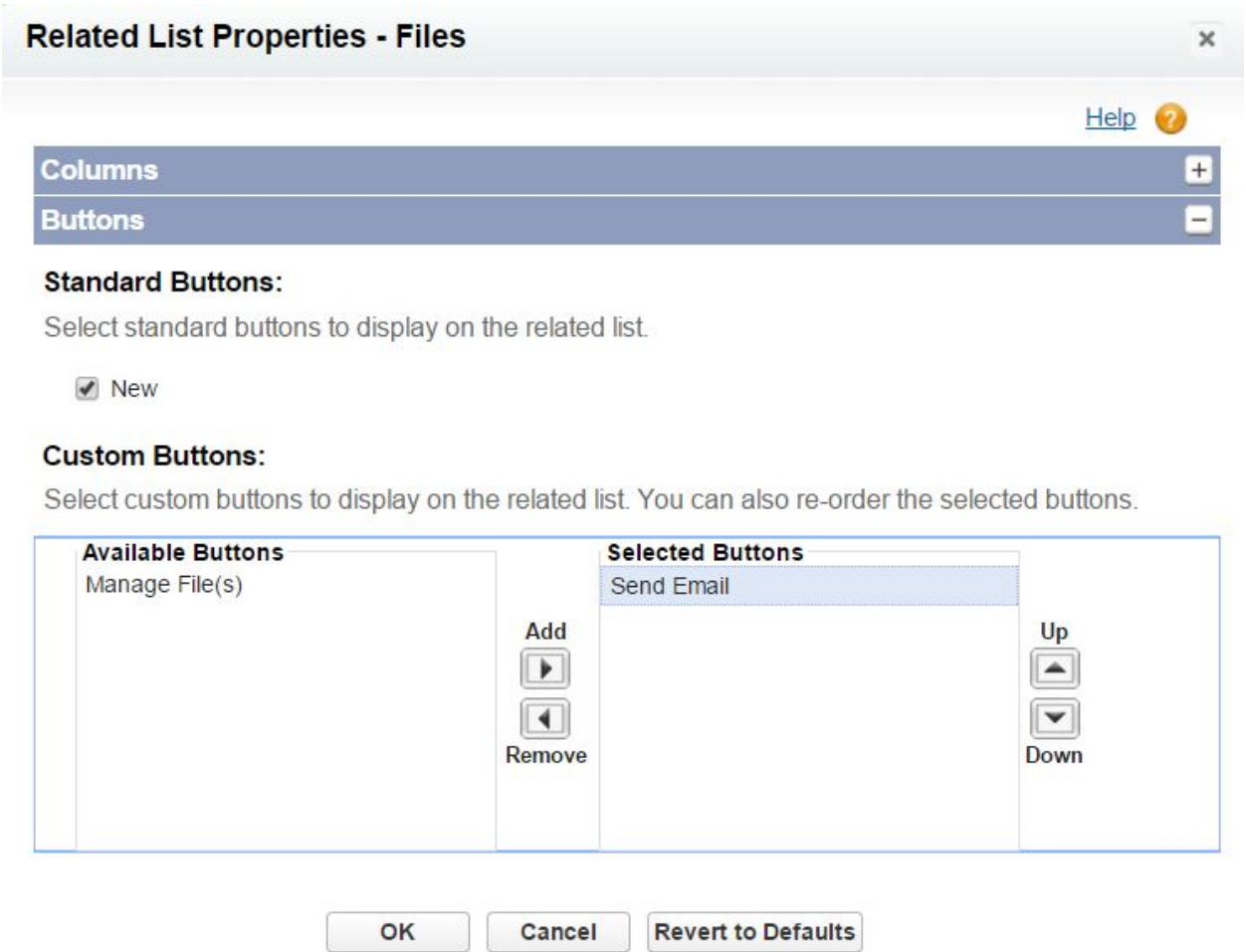
Sort By:

Ascending
 Descending

Buttons

OK Cancel Revert to Defaults

6. Configure buttons you want to enable for related list



7. Click **Save**