G-Link File Explorer User Guide

Introduction

G-File Explorer component will allow users to create folder structures for the Salesforce record and also upload and download files inside those folder structures. It will also allow users to perform various file actions like Download, Preview, Delete, Copy, Move, New Version. Your System Admin can also enable some custom actions as well.

Prerequisite

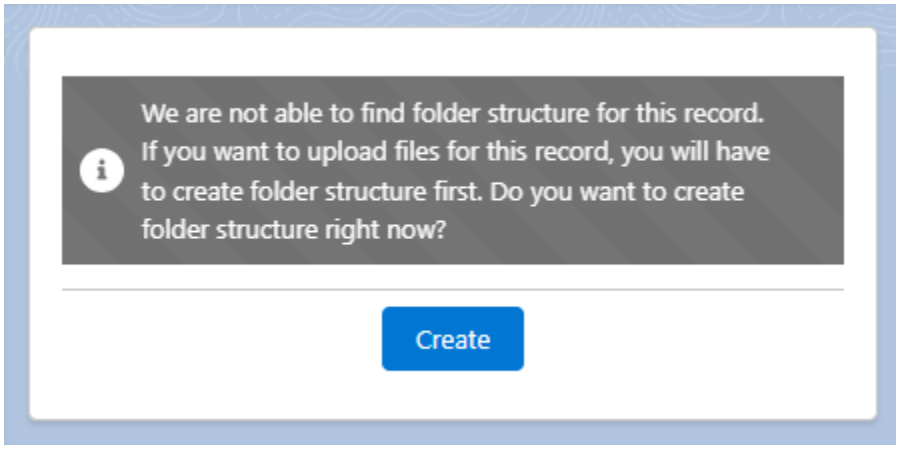
To use the below features, your System Admin must add the **G-File Explorer** component to your Salesforce record detail page. Please request your System Admin to follow the steps in the **G-Link File Explorer Setup** to enable all the below features.

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.

Create Record Name folder for the Salesforce record

1. Open Account record detail
2. Find File Explorer section
3. If there are no files uploaded to the Account record, a message will be displayed along with a **Create** button to create the folder structure for the account record
4. Click **Create**



5. The Account Name folder will be created and linked with the Account record

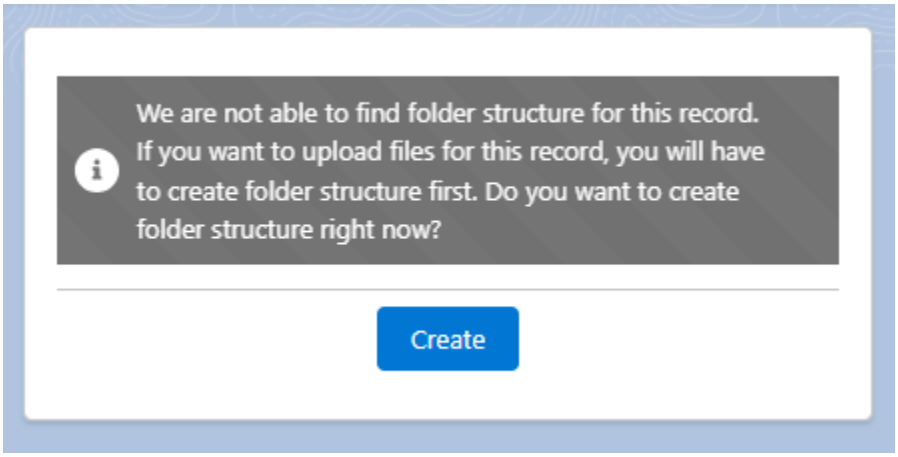
Notes:

1. Going forward this Account Name folder will be loaded in the File Explorer section and it will also be used when files will be uploaded from this Account record detail page.
2. If you have enabled the auto export of Salesforce files, this folder will be automatically created

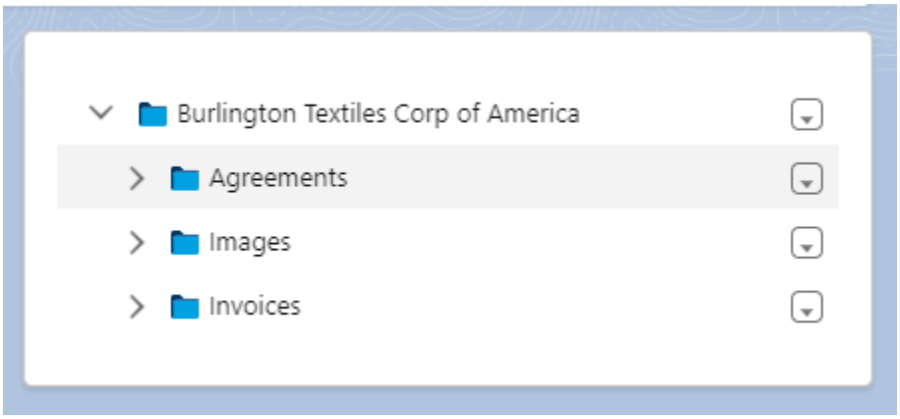
Create Record Name Folder with Sub Folders(Automatically)

You can auto create subfolders along with the record name folder on folder structure creation for Salesforce records. Follow below steps for that.

1. Open Account record detail
2. Find the File Explorer



3. Click **Create**
4. Below folder structure will be created

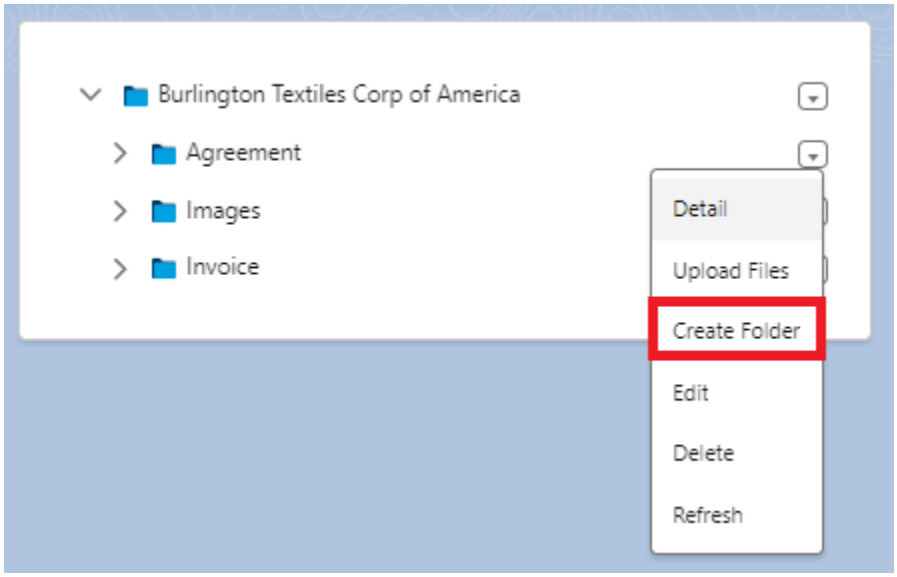


Note: If subfolders under record name folder are not getting created, please contact your System Admin and request to enable it by following steps in the **G-Link File Explorer Setup**

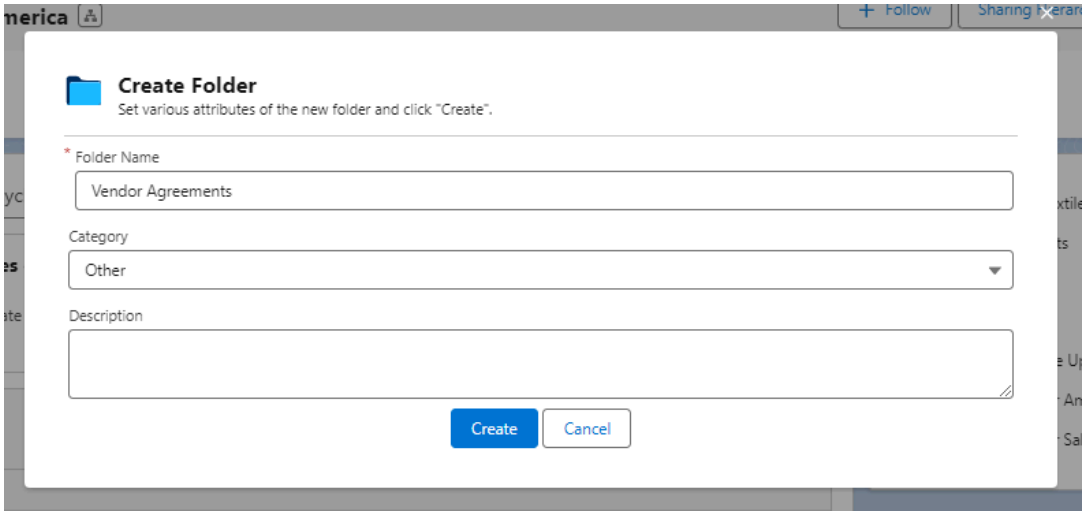
Create Sub Folder(Manually)

You can manually create an additional sub folder inside the record name folder or other subfolders. Follow below steps to manually create a subfolder.

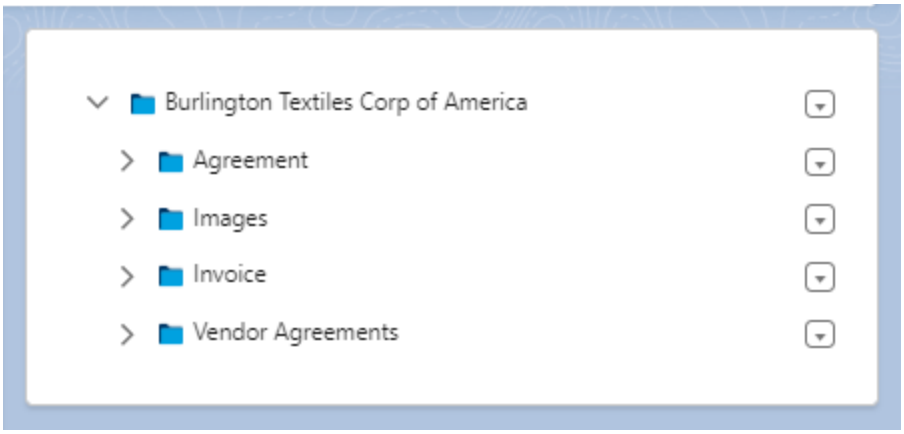
5. Open Account record detail
6. Find the File Explorer
7. Click the menu for the G-Folder for which you want to create subfolder
8. Click **Create Folder**



9. A pop-up will open. Provide Folder Name and Category and click **Create**



10. After that you will see new folder in the folder structure

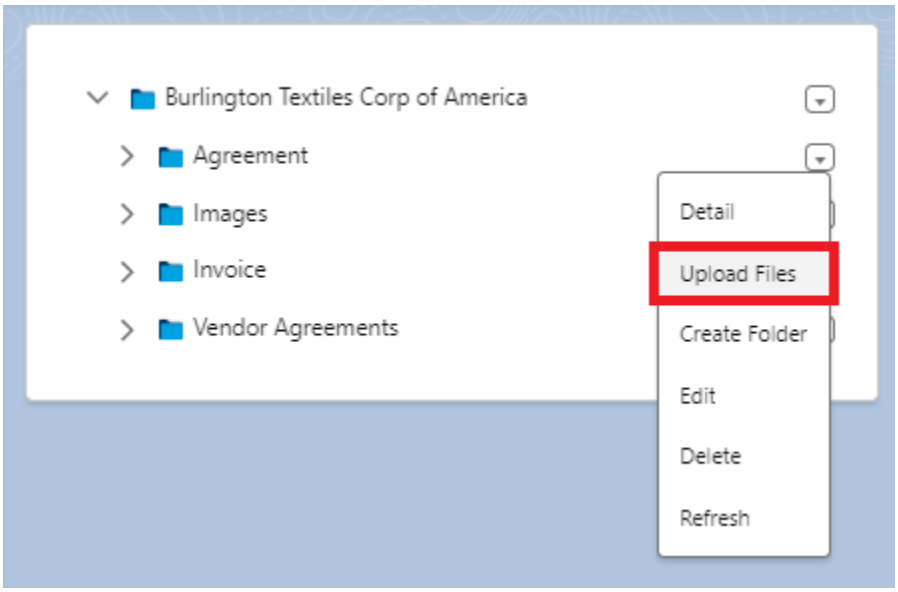


Note: If you do not see the Create Folder action for G-Folders, please contact your System Admin and request to enable it by following steps in the **G-Link File Explorer Setup**

Upload Files

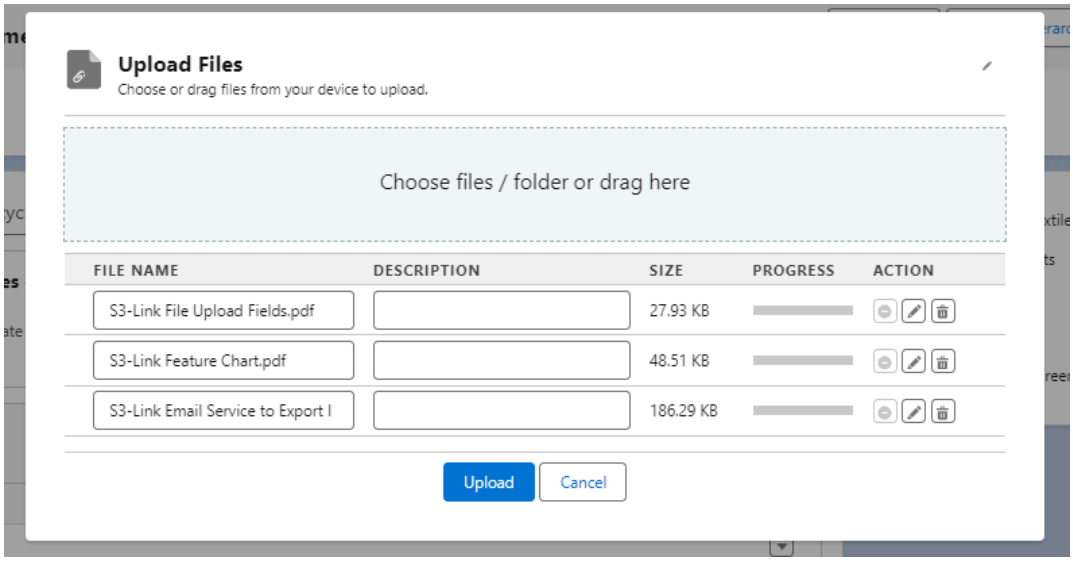
You can upload files inside any folders in File Explorer. Follow below steps to upload files inside folders.

1. Open Account record detail
2. Find the File Explorer
3. Click the menu for the G-Folder where you want to upload files

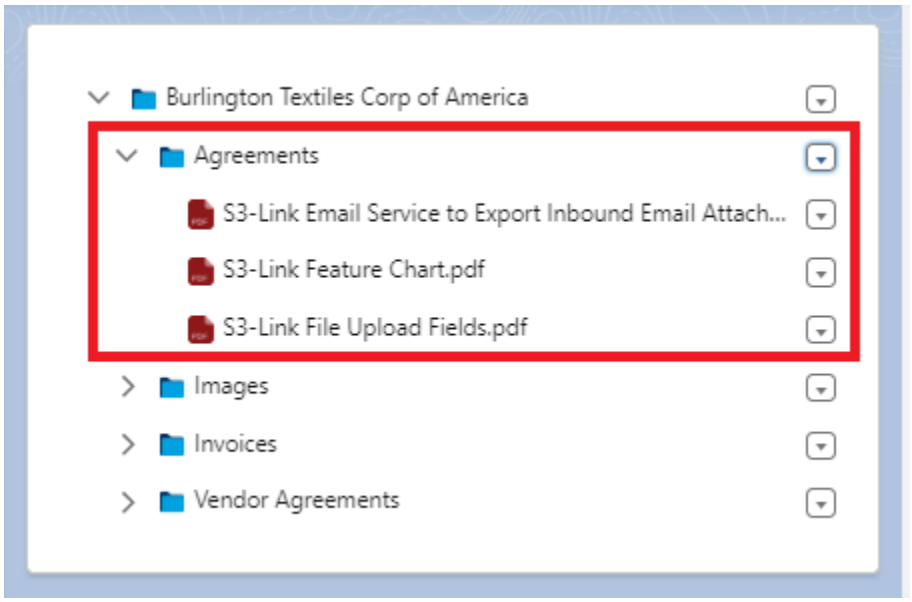


4. A pop-up for file upload will open
5. Click on Choose files and select files you want to upload from your local storage

6. Click **Upload**



7. After upload is successful, new files will displayed in File Explorer

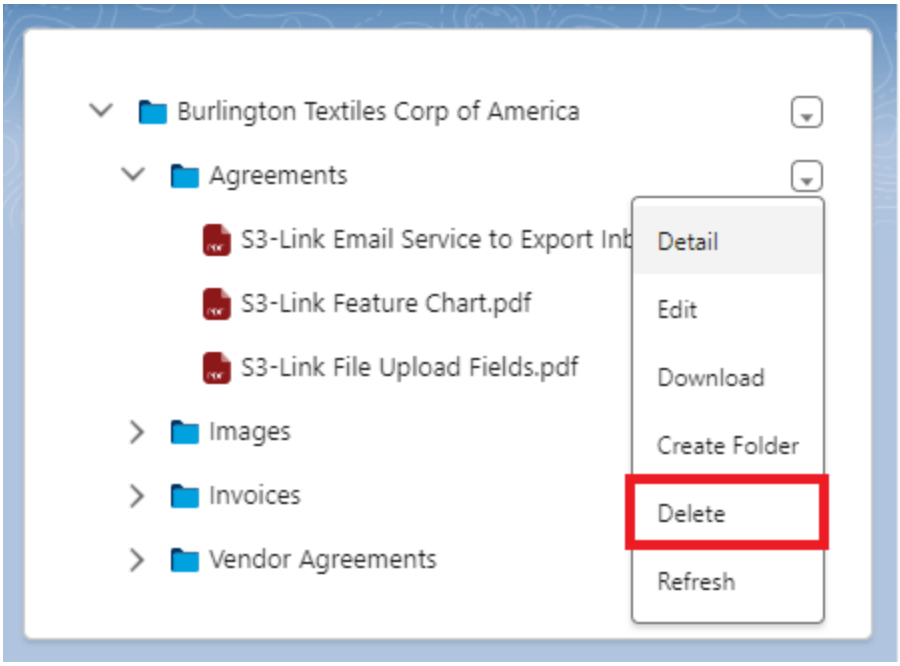


Note: If you do not see the Upload Files action for G-Folders, please contact your System Admin and request to enable it by following steps in the **G-Link File Explorer Setup**

Delete Folder

You can delete the whole folder from File Explorer. This will delete the folder along with its subfolders and files. Follow below steps to delete a folder.

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



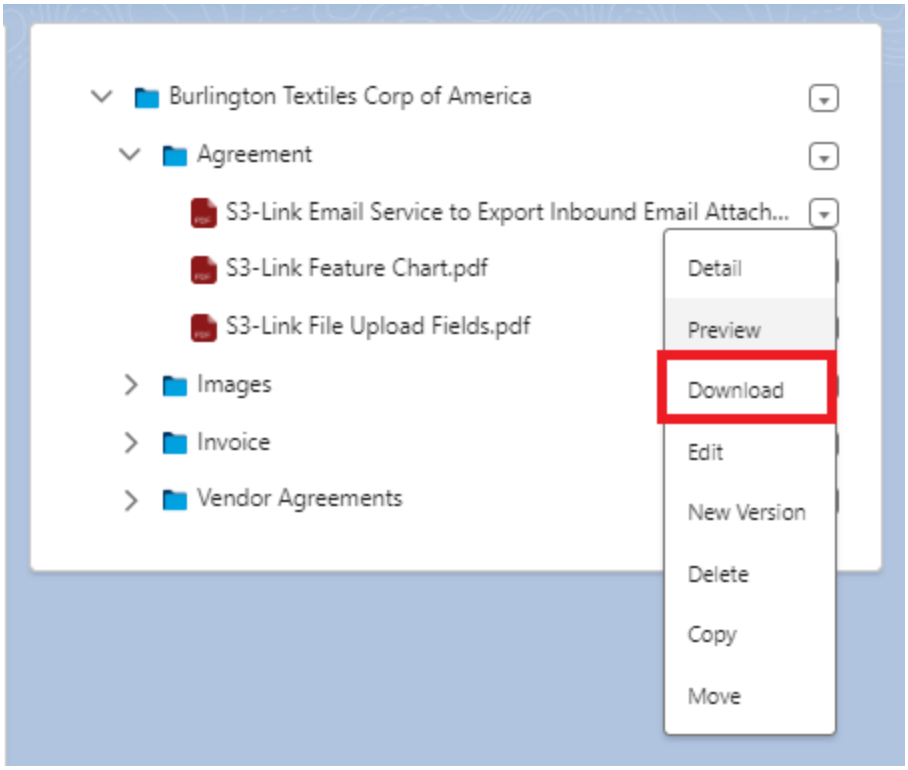
5. The folder along with it's subfolder and files will be deleted
6. You will not see that folder in File Explorer

Note: If you do not see the Download action for G-Folders, please contact your System Admin and request to enable it by following steps in the **G-Link File Explorer Setup**

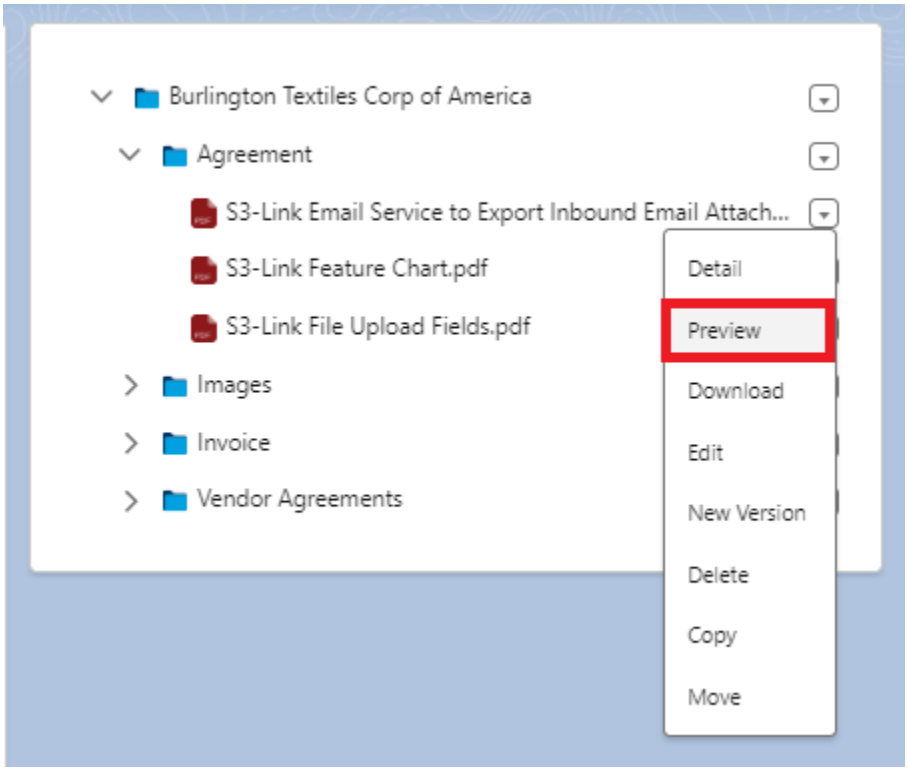
Download & Preview File

You can download and preview any file that is displayed in the File Explorer. Follow the below steps for that.

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

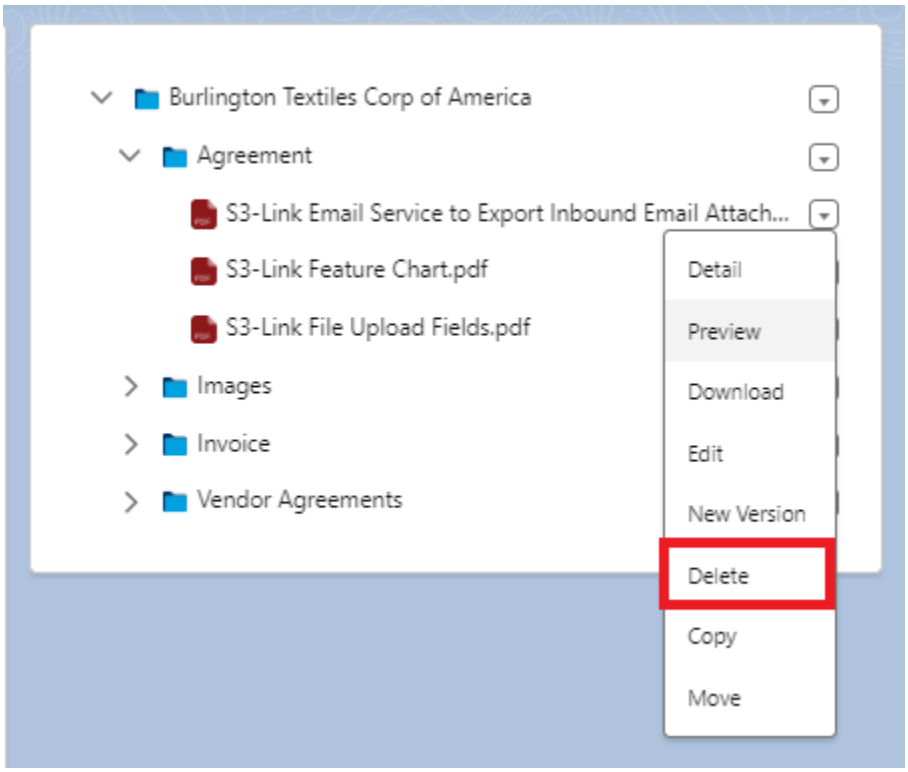


Note: If you do not see the Download & Preview actions for G-Files, please contact your System Admin and request to enable them by following steps in the G**-Link File Explorer Setup**

Delete G-File

You can delete any file from the File Explorer. Follow the below steps for that.

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

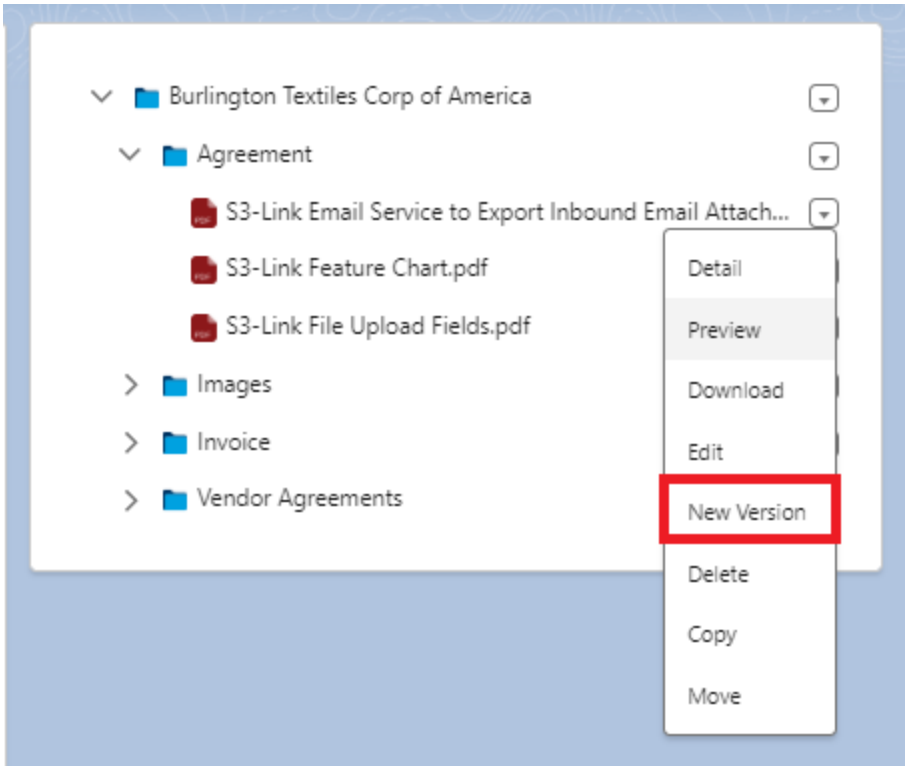


Note: If you do not see the Delete action for G-Files, please contact your System Admin and request to enable this by following steps in the G-Link File Explorer Setup

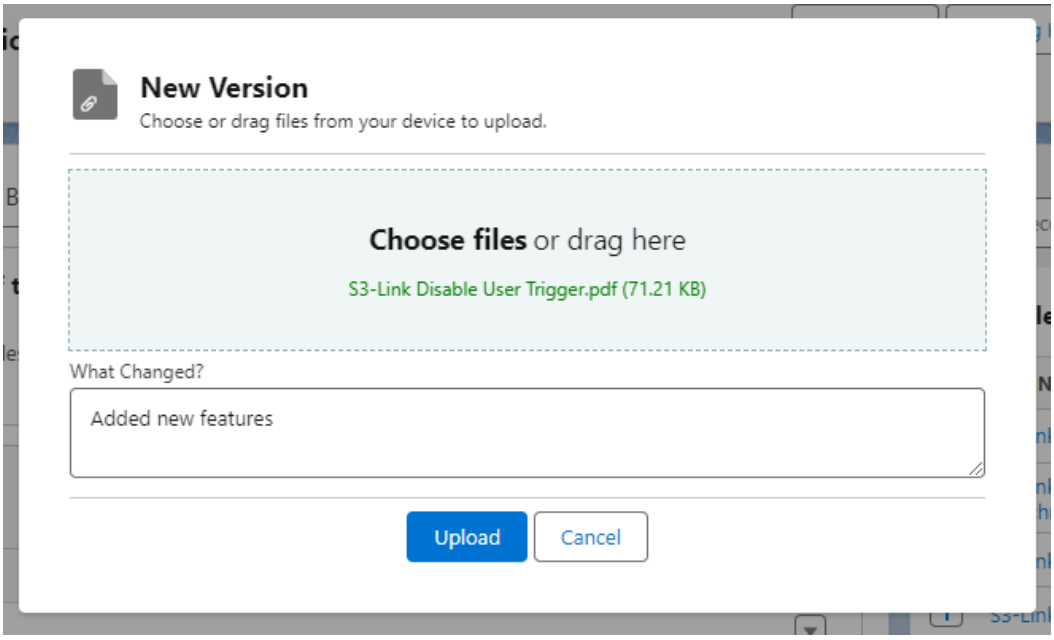
Upload New File Version

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 Explorer
3. Click **New Version** from menu for the G-File for which you want upload new version



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:

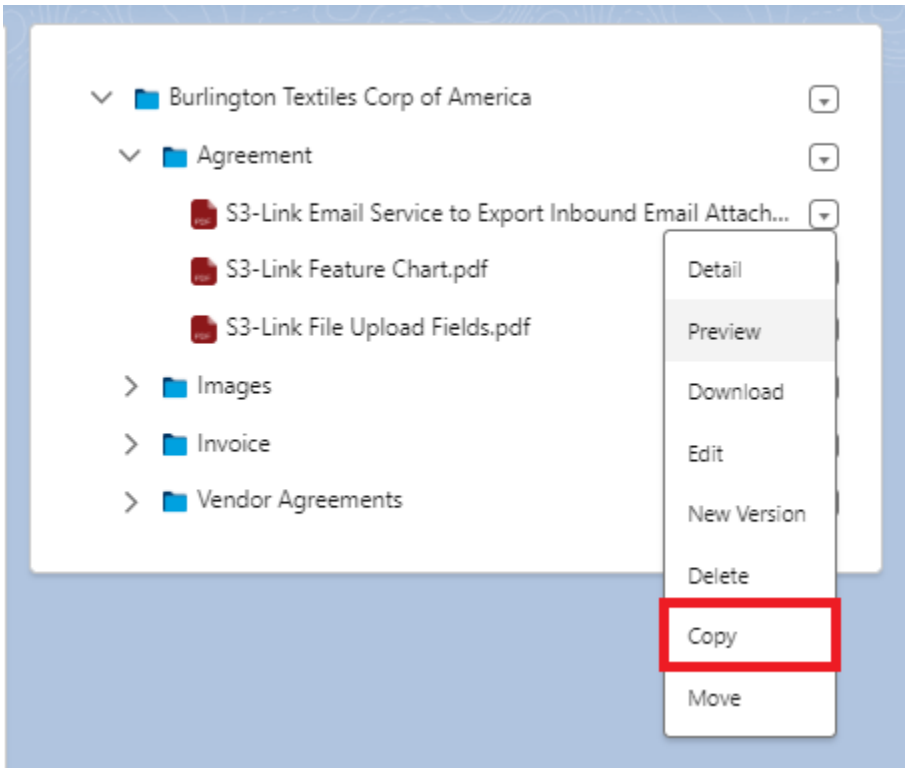
- Follow the steps in the guide G-Link Download & Preview File Version to download or view a specific file version of the G-File record.

- 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 Explorer Setup

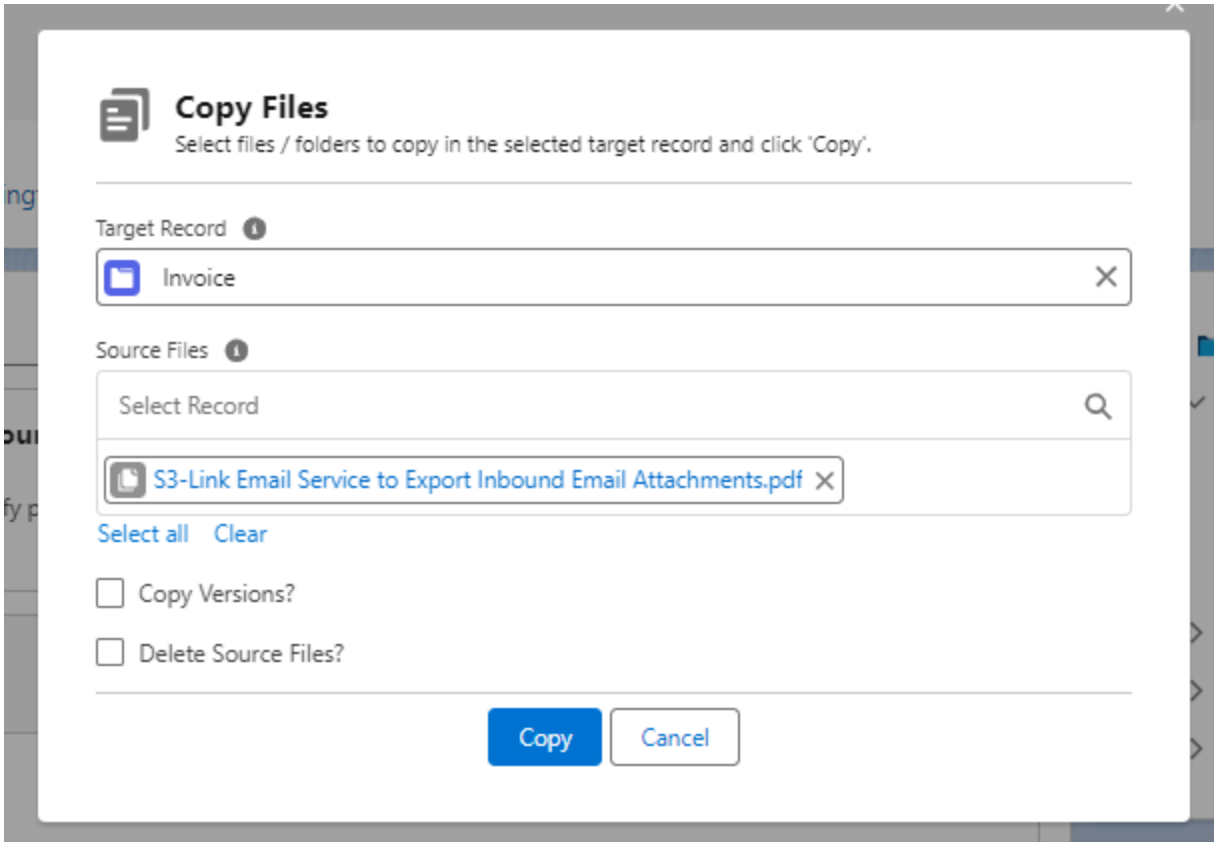
Copy File

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 Explorer
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**



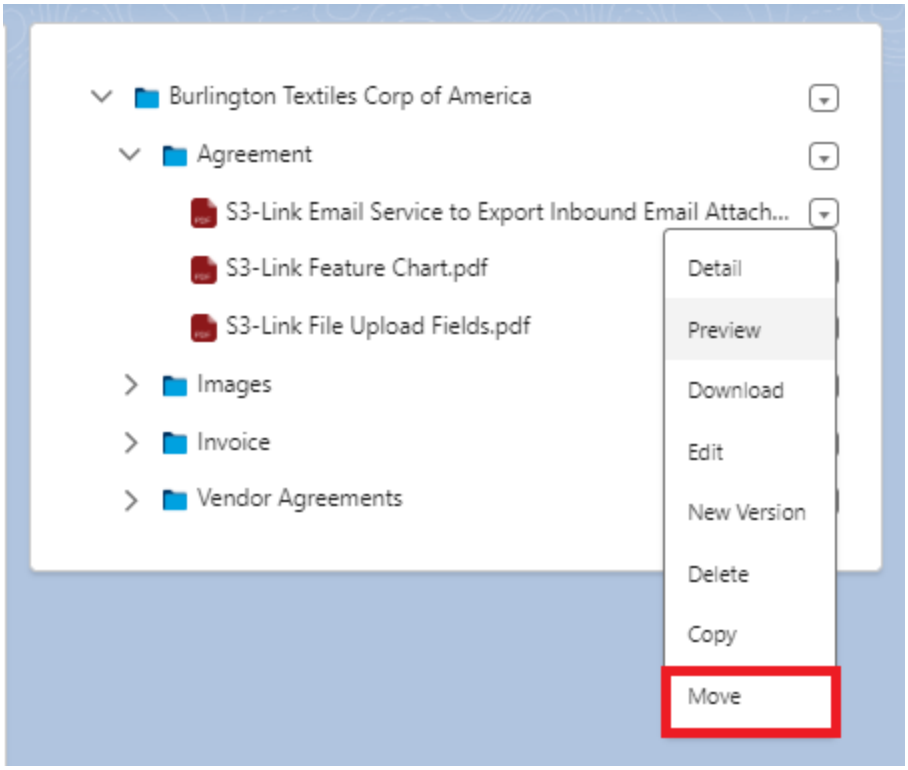
6. If you want to copy all file versions along with the file then set the **Copy Versions?** checkbox to true
7. If you want to delete source files after copy then set the **Delete Source Files?** checkbox to true
8. Click **Copy** and the file will be copied to the target folder

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 Explorer Setup

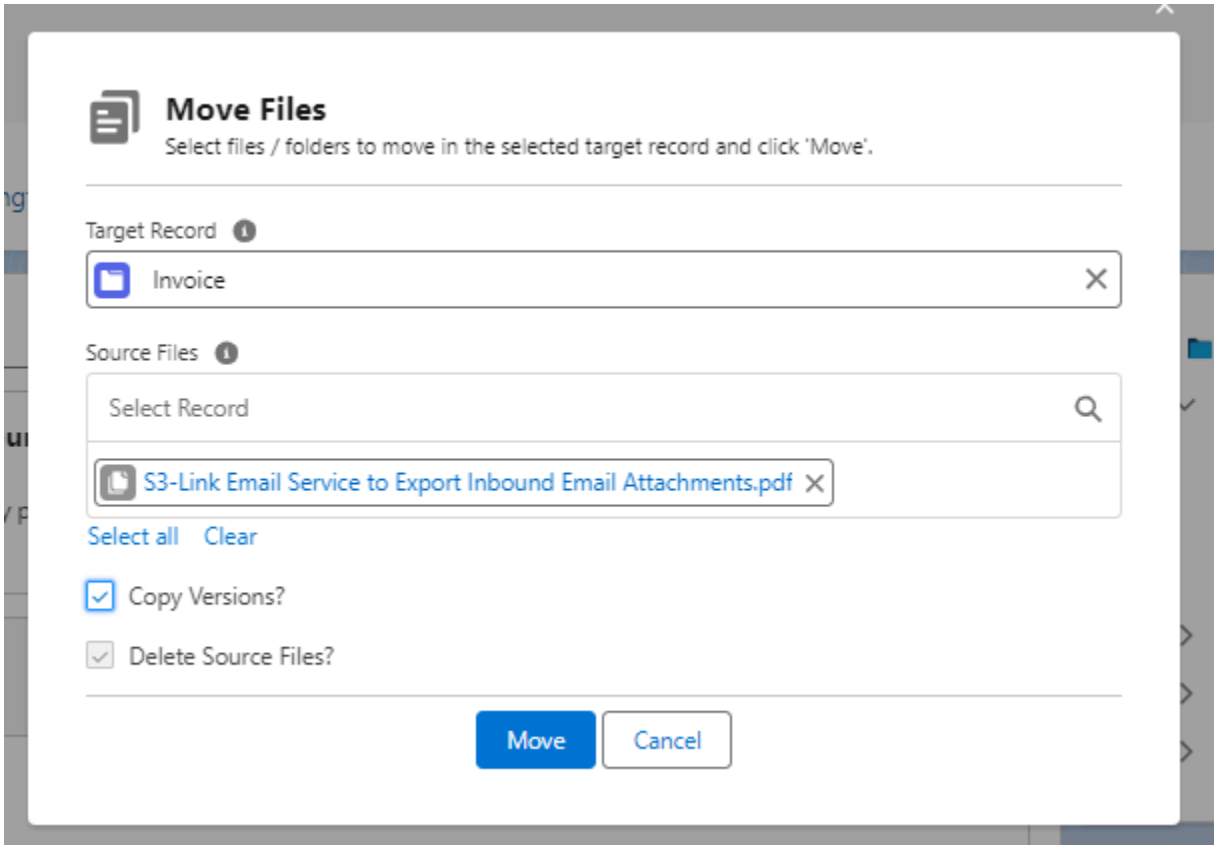
Move File

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 Explorer
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**



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 Explorer Setup