



Get Started with Link Anything

Quickstart Guide for Users



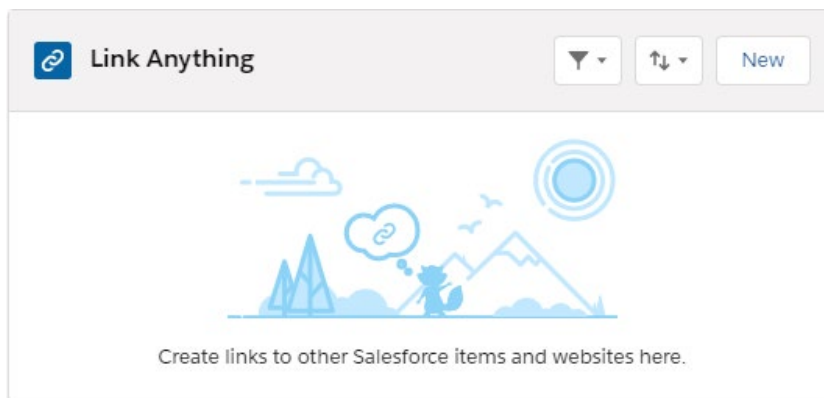
What is Link Anything?

With Link Anything, you can link any Salesforce record to any other Salesforce record, and you can link external weblinks to Salesforce records. To be able to create links, the Link Anything Lightning Component must be added to your page layout (See section Installation and Configuration).

Good to know: Whatever action you do, you will always get a Salesforce toast message that informs you about your status of completion (success or failure).

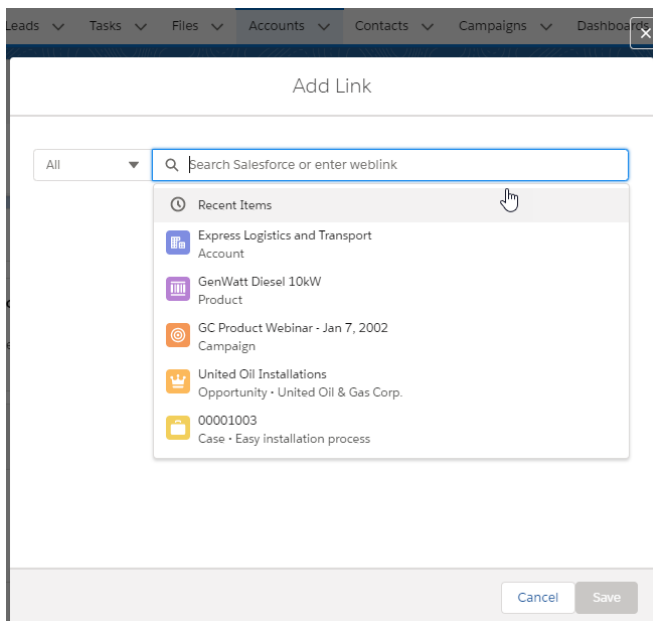
Creating Links

When there are no links available yet, Link Anything shows an empty tile.



To add a new link of any kind, just press **New**.

You will see a familiar search dialog that already displays your recent items. You can search for items and you can filter then type of items (left dropdown).



Be aware, that on search there is no “search dialog list” implemented. If you have more items in your hit list, refine your search or use a filter.

If you have selected a Salesforce record, the next screen allows you to

- Add a description
- Define, who can see/access the link
 - **All users can see this link** Everybody with access to the record you are currently in. This is good for a team-oriented working and collaboration.
 - **Only I can see the link** This allows a more personal optimization not interfering with others. Private links are indicated with the  symbol.



- Define, if the link is automatically placed inside the referred object as well (bidirectional). Bidirectional links are indicated by the  symbol.



Add Link

 Express Logistics and Transport ✕

Description

Salesforce Sans ▾

12 ▾

■ ▾

B

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This is my first link

Who sees this link?

☒ All users can see this link

☐ Only I can see this link

☐ Create bidirectional link ?

Cancel

Save

This is it! You have created your first link.


Link Anything





[New](#)


[Express Logistics and Transport](#)



Account

Account Type: Customer - Channel

Website: www.expressl&t.net

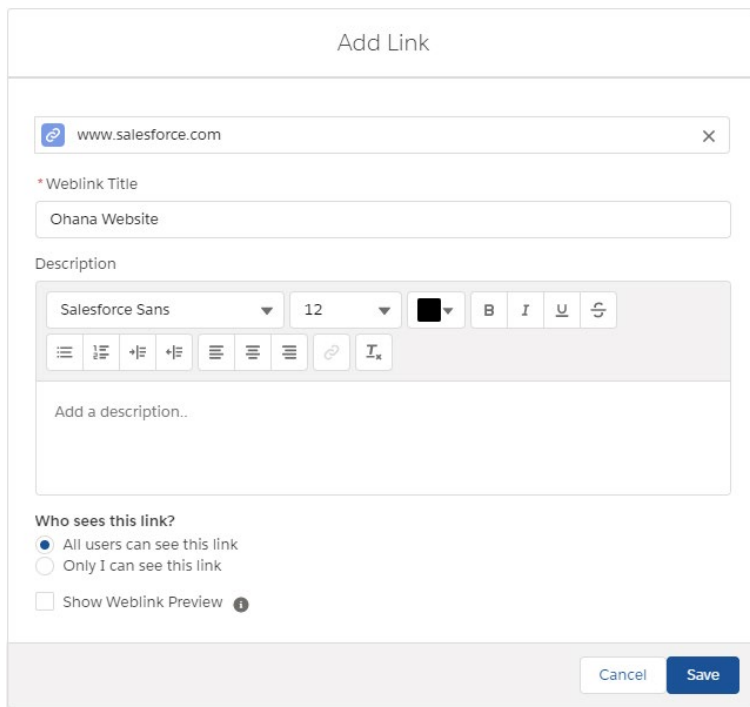
Account Phone: (503) 421-7800

This is my first link

The link always displays the name of the linked record and its secondary field if it has content. It also displays a set of additional fields configured by the administrator.

Creating URL links

When selecting an external weblinks, you must start with http:// or https:// followed by the external URL. For example, you can use <https://salesforce.com>.

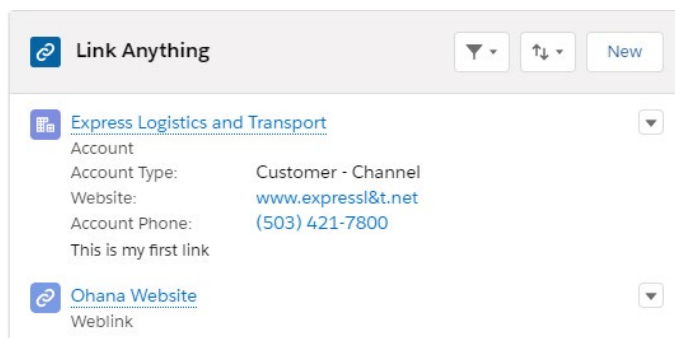


The 'Add Link' dialog box contains the following fields and options:

- URL:** A text input field containing 'www.salesforce.com' with a clear button (X) on the right.
- * Weblink Title:** A text input field containing 'Ohana Website'.
- Description:** A rich text editor with a toolbar showing 'Salesforce Sans' font, size '12', bold (B), italic (I), underline (U), and link (S) options. Below the toolbar is a text area with the placeholder 'Add a description..'
- Who sees this link?:** Two radio button options: 'All users can see this link' (selected) and 'Only I can see this link'.
- Show Weblink Preview:** An unchecked checkbox with an information icon (i).
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

In this case, in addition to the parameters mentioned above, you can also add a readable description of the link.

When you check **Show Weblink Preview**, Link Anything preloads a preview of the website whenever you hover the link. See “Advanced Usage of Link Anything” for more details.



The Link Anything interface shows a list of links with the following details:

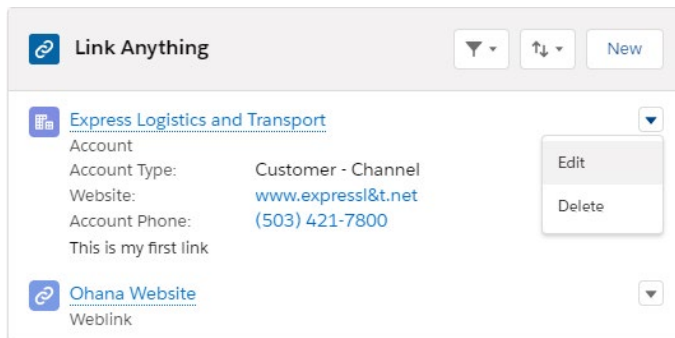
- Link Anything Header:** Includes a filter icon, a sort icon, and a 'New' button.
- Link 1:** 'Express Logistics and Transport' (Account).
 - Account Type: Customer - Channel
 - Website: www.expressl&t.net
 - Account Phone: (503) 421-7800
 - This is my first link
- Link 2:** 'Ohana Website' (Weblink).

Using Links

Using links is straight forward. Just click the link. Record based links open in the same tab of the browser, external hyperlinks must open (and do so) in a new tab. If you want to open the record links also in new tabs, use your right (or if available middle) mouse button.

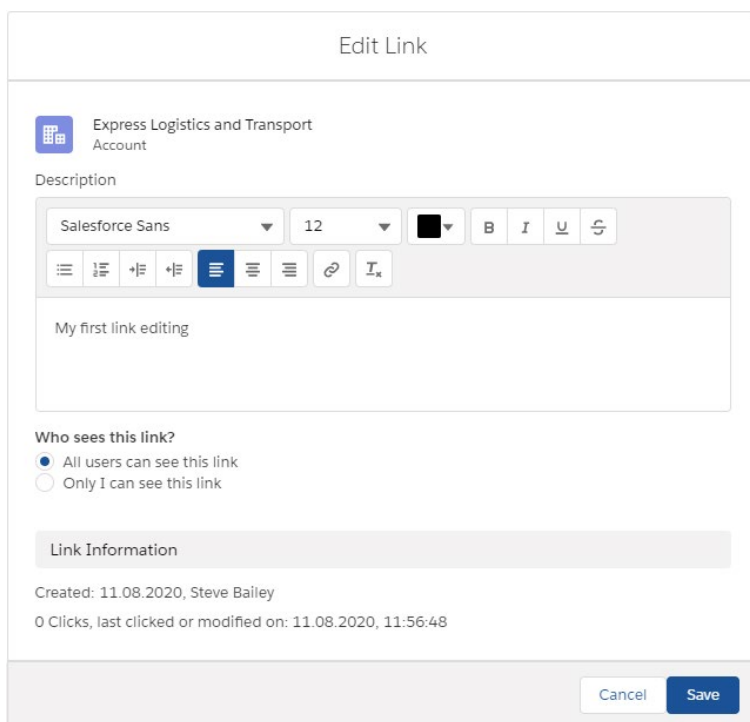
Editing Links

To edit a link, use the dropdown next to the link and select **Edit**.



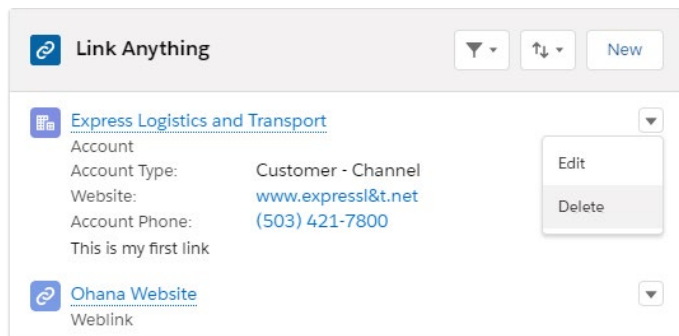
You can edit the rich text description and visibility mode. You cannot change the bidirectional settings. Links can be edited by everybody who can see the link.

Also, in the footer, you can see more information on creation and usage of the link.



Deleting Links

To delete a link, just select **Delete** in the link context menu.



You will be prompted before the link is deleted.

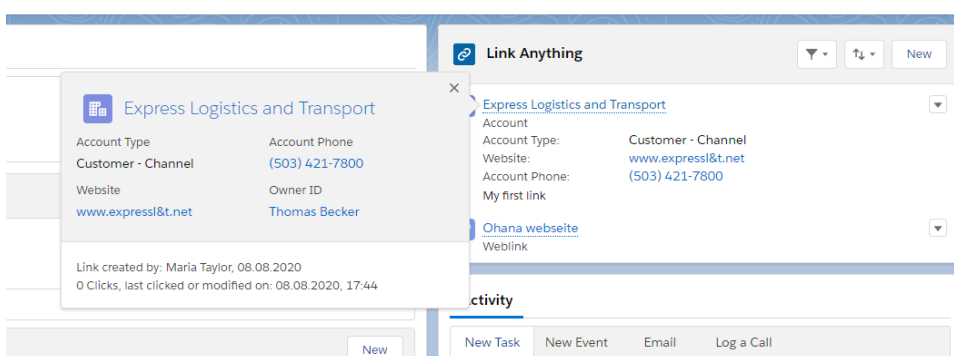
Be aware, that only the creator (owner) of the link and administrators can delete links, even if they are set to visible for all.

Advanced Usage of Link Anything

Now, that you have learned the basics of working with links, we show you some power tips & tricks that come with Link Anything.

Hover

When hovering an object link, it displays the compact preview card for the object.

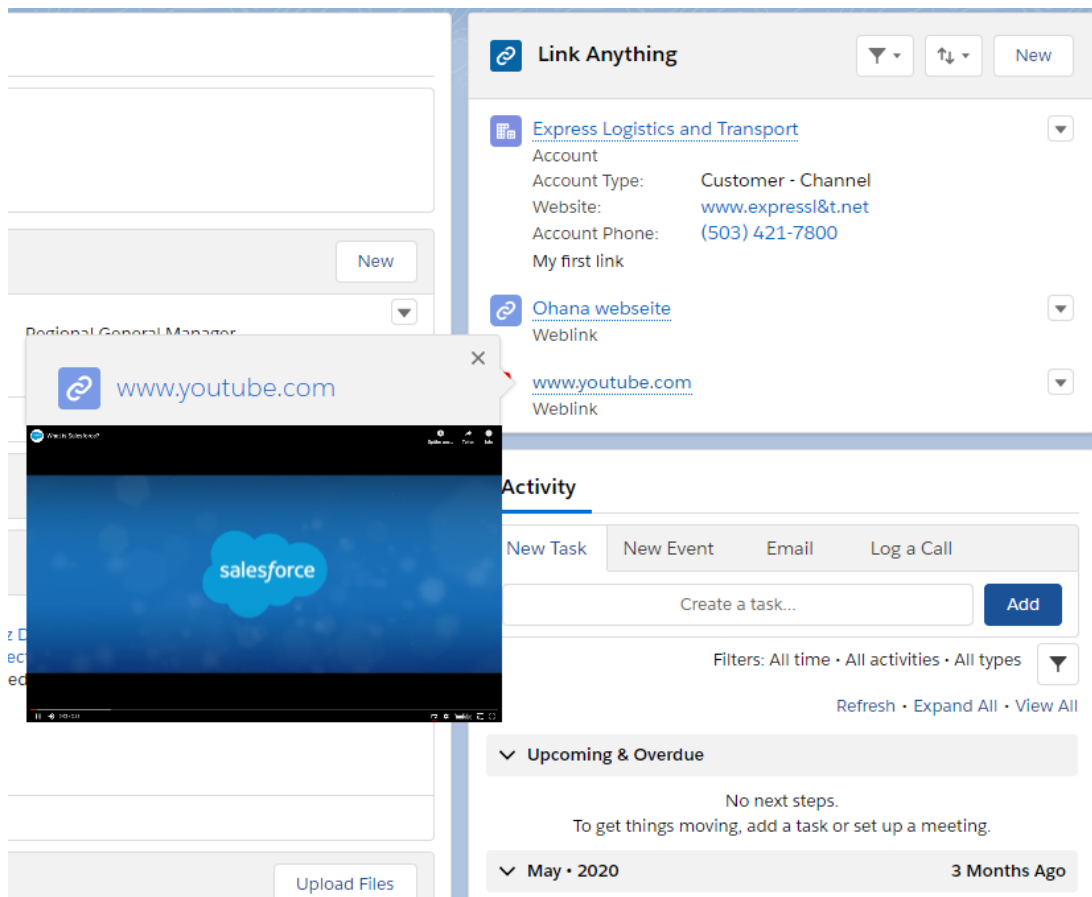


When hovering a website, if the website allows, it shows a preview of the website.

You can also embed links to Google a YouTube video which starts running right inside your hover popup-window. With this feature, you can create direction information or video help/tutorial links.

Creating YouTube video links

To create a YouTube video link, just navigate to youtube.com and select your video. Copy the video URL from your browser and create a new weblink in Link Anything. The result will be awesome, if you hover it.



Clicking the header above the video opens YouTube in a new browser tab. Clicking on the video stops/resumes play.

Creating record related reports

Very interesting is the feature, that you can link Salesforce reports and apply the current object ID as parameter. With this, you can create links to reports that evaluate for the current record.

A description how to create such reports can be found here.

<https://www.youtube.com/watch?v=HfvJZuYTUmM>

Just create an URL Link within Link Anything with the resulting URL and you are done. Your admin can automate this using process builder or a trigger on record creation.

Creating Google Maps links

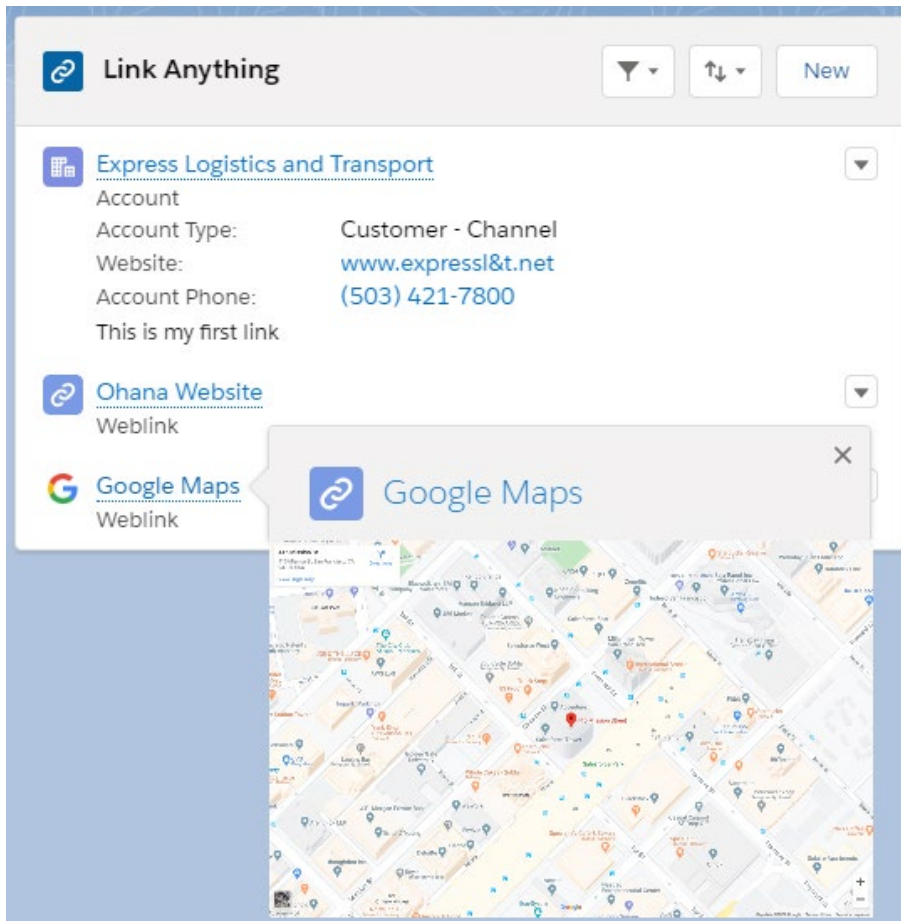
If you have a google API Key available, you can also embed Google Maps into Link Anything and show a preview when you hover over the link.

To create a Google Maps link use the following link syntax:

`https://www.google.com/maps/embed/v1/place?key=GOOGLE_API_KEY&zoom=18&q=HOUSE_NUMBER+STREET+CITY+STATE`

Example:

https://www.google.com/maps/embed/v1/place?key=API_KEY&zoom=18&q=415+Mission+Street+San+Francisco+CA



This might make sense also as a trigger automated process administrated by your admin to always have driving directions at hand.

Optional parameters

The following optional parameters can be used with any of the map modes listed above.

- **zoom** sets the initial zoom level of the map. Accepted values range from 0 (the whole world) to 21 (individual buildings). The upper limit can vary depending on the map data available at the selected location.
- **maptype** can be either roadmap (the default) or satellite, and defines the type of map tiles to load.

For further information please visit the [Google Maps Developer Guide](#).