



Installation & Setup

Quickstart Guide for Admins



LINK ANYTHING

Link Anything is a managed package that is installed through the AppExchange. The URL is <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000GBEDuUAP>

There is a free trial available with a side wide license.

< SEARCH RESULTS | ALL APPS > IT & ADMINISTRATION > ADMIN & DEVELOPER TOOLS

Link Anything - Link, add or relate any Salesforce object, record or website

By doculife GmbH

Link Anything to everything in Salesforce

Link any of your records to multiple other records. Want to Link a Calendar Event to multiple Campaigns? A specific Task to multiple Cases and a Campaign? Relate to Reports or external Websites? No problem. Hundreds of use cases for your organisation.

€36 EUR per user per year Discounts available for nonprofits

Get It Now

RATING: ★★★★★ (9) LISTED ON: 7/24/2020 LATEST RELEASE: 6/25/2020

Link, match or combine - campaigns, events, tasks, calendar, projects

With Link Anything you can link, add or relate any of your organisation's Salesforce records to one or multiple Salesforce records.

Click GET IT NOW for a FREE TRIAL.

1 of 3 : Link Anything to everything

Installation

After Installation, you have 1 new Custom Object and 2 new Custom Metadata Types inside your Org.

Lightning Ready	PE & Up
No Limits	Person Accounts
Multi-Currency	
Package Contents	
Custom Objects: 3	Lightning Components
Custom Applications: 0	Global: 1
Custom Tabs: 0	App Builder: 0
	Community Builder: 0

The new Custom Object is the “Any Link” object which relates objects with objects or objects with weblinks. The Any Link records can be used for reports and within processes. Deleting records of type “Any Link” will erase the link completely from your org.

Security

There are two kinds of links: private links and public links. Private links can only be seen by the creator = owner and the admin, while public links can be seen by all users which have been assigned to the Link Anything permission set and a valid license.

Link Anything ships with a Public Group called “Link Anything – Public Link User”. After installation, all existing users are added to this group and on creation of a new user, it is also automatically added to this group. This behavior cannot be deactivated.

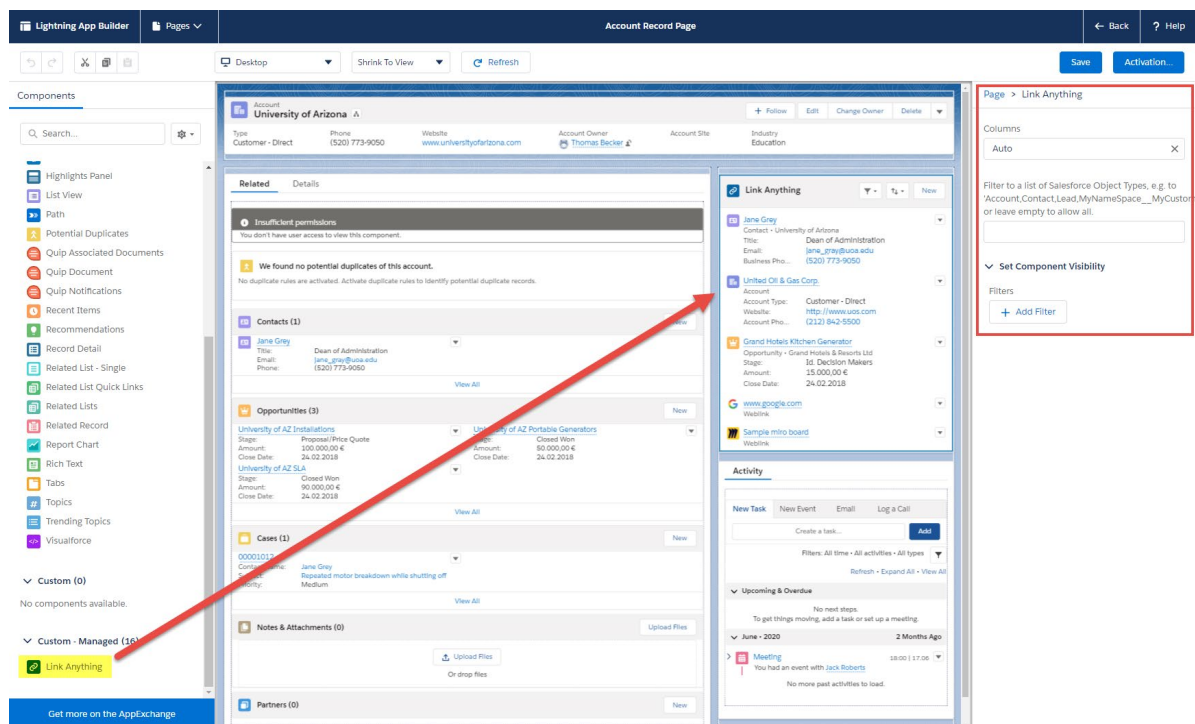
Link Anything uses record based sharing rules. By default, all Links are private to the creator = owner. For so called “public links” the link record is also shared with the public group “Link Anything – Public Link User”.

Link Anything ships with one custom permission set called “Link Anything”. Users must be assigned to this permission set to be able to use Link Anything.

Implementation

Link Anything has just to be added to the page layout of any standard or custom object. It automatically relates to this object, there are no custom field assignments needed. To add Link Anything to a page layout, just drag & drop the component “Link Anything” to the designated page.

We recommend the layout style template “Header and Right Sidebar”, nevertheless, you are free to put the Link Anything custom component wherever it suits for you and your use case or your organization.



Link Anything Design Attributes

Columns

- Auto (Default, Recommended): The best number of columns for the current layout and page width is automatically calculated based on available space, text length and number of Link Cards to be displayed.
- 1,2,3: Fix number of Columns for Link Cards

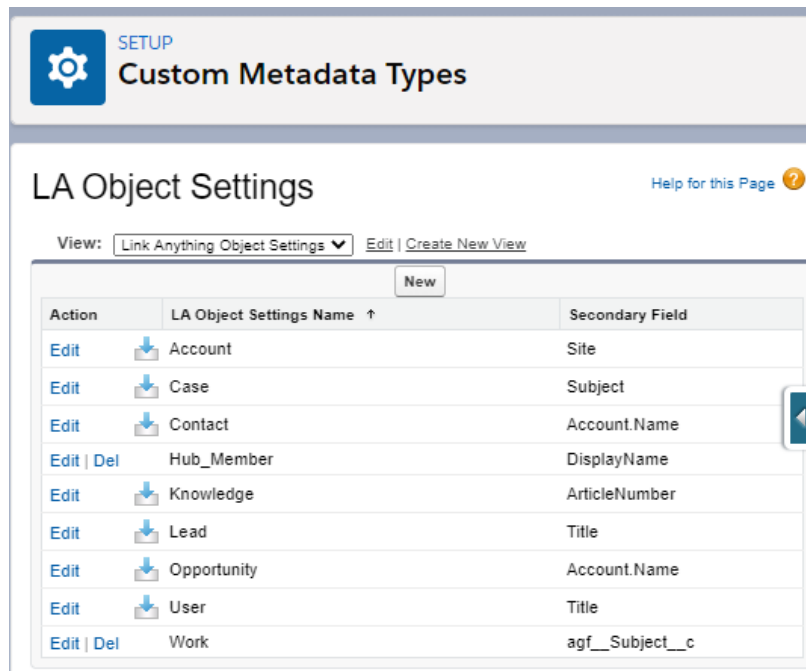
Object Type Filter

If left blank, Link Anything allows linking any object type to any other. You can also specify a comma separated list of object types. In this case, this instance of Link Anything does only allow for the specified object types. For example, you can limit accounts only to be linked to campaigns and your one custom object. Hyperlinks are always active and cannot be deactivated. Already existing Links will remain existing.

Advanced Configuration

When adding new links, the recent objects used are displayed by default. For this lookup search, you can configure per object type, which additional fields are displayed to the user. Use the field “Secondary Field” to configure this.

The fields to be shown is configured inside the custom meta data setting “LA Custom Settings”. Link Anything already ships with defaults for some standard objects. You can easily extend or change this for your requirements, for example for Knowledge or Agile Accelerator or your custom objects. (see **yellow** highlighting in the example screenshot on page 4)



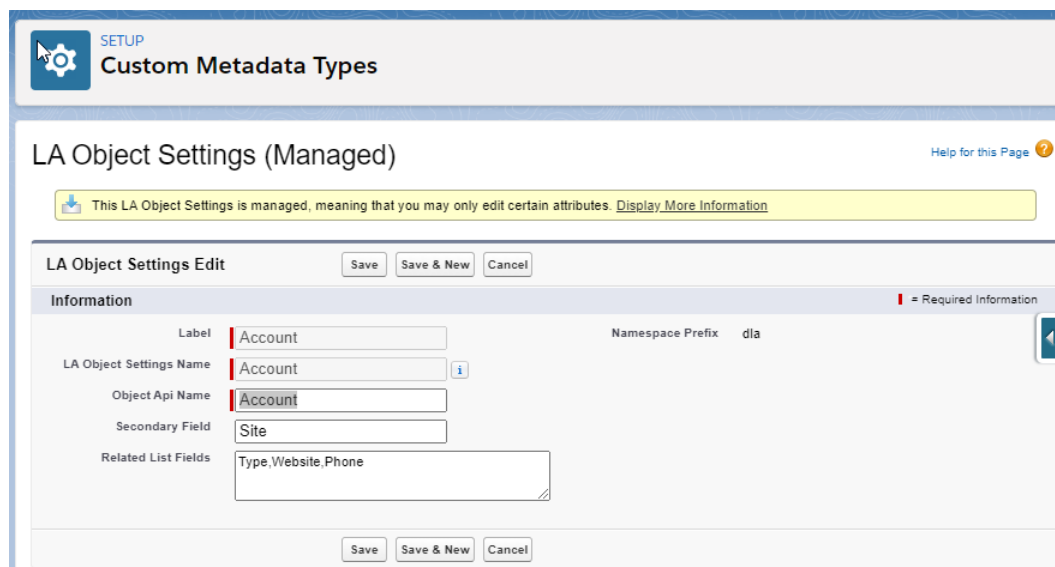
SETUP Custom Metadata Types

LA Object Settings [Help for this Page](#)

View: **Link Anything Object Settings** [Edit](#) | [Create New View](#)

[New](#)

Action	LA Object Settings Name ↑	Secondary Field
Edit	Account	Site
Edit	Case	Subject
Edit	Contact	Account.Name
Edit Del	Hub_Member	DisplayName
Edit	Knowledge	ArticleNumber
Edit	Lead	Title
Edit	Opportunity	Account.Name
Edit	User	Title
Edit Del	Work	agf__Subject__c



SETUP Custom Metadata Types

LA Object Settings (Managed) [Help for this Page](#)

[This LA Object Settings is managed, meaning that you may only edit certain attributes. \[Display More Information\]\(#\)](#)

LA Object Settings Edit [Save](#) [Save & New](#) [Cancel](#)

Information ■ = Required Information

Label **Account** Namespace Prefix **dla**

LA Object Settings Name **Account** [i](#)

Object Api Name **Account**

Secondary Field **Site**

Related List Fields **Type,Website,Phone**

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

You can also add record field data to the link displayed. Just add a comma separated list of fields to the custom meta data field “**Related List Fields**” for the required object. (see **green** highlighting in the example screenshot on page 4)

When using weblinks, Link Anything uses the Favicon-Mechanism provided by most websites to display the favicon for the link. This helps to visually navigate the links. (See Google icon in the example screenshot)

If the website has no favicon or does not use the standard concept for it or if you do not like the genuine favicon, you can override the icons displayed through the Custom Metadata Types “LA Weblink Favicons”.

The following example relates a custom favicon to linked miro® Boards.

The screenshot shows the 'Custom Metadata Types' setup page for 'LA Weblink Favicons'. It includes a table with one entry: 'Miro' with namespace prefix 'dla'. Below this is the 'LA Weblink Favicons (Managed)' section, which contains a yellow warning box stating that the type is managed and only certain attributes can be edited. The 'LA Weblink Favicons Edit' form is shown with the following fields:

Field	Value	Field	Value
Label	Miro	Namespace Prefix	dla
LA Weblink Favicons Name	Miro		
Weblink Origin	https://miro.com		
Favicon Url	https://miro.com/static/favico		

Weblink Origin: <https://miro.com>

Favicon Url: <https://miro.com/static/favicons/favicon-32x32.png>

(see miro icon in the example screenshot)

The screenshot shows the 'Link Anything' interface with a list of links. Each link entry includes a title, a description, and a list of attributes. The links are:

- Jane Grey** (Contact - University of Arizona)
 - Title: Dean of Administration
 - Email: jane_gray@uoa.edu
 - Business Phone: (520) 773-9050
- United Oil & Gas Corp.** (Account)
 - Account Type: Customer - Direct
 - Website: http://www.uos.com
 - Account Phone: (212) 842-5500
- Grand Hotels Kitchen Generator** (Opportunity)
 - Stage: Id. Decision Makers
 - Amount: 15.000,00 €
 - Close Date: 24.02.2018
- www.google.com** (Weblink)
- Sample miro board** (Weblink)

Smart Tweaks

- You can use triggers, processes or flows to automatically create links within objects. For example, you can automatically create links to some corporate data/records/documents or other records on record creation or modification.



Caution: make sure to understand the security model when doing this.

- You can create record-individual reports. See User Guide Tweaks on this.
- You can link videos for tutorials for example (see User Guide Tweaks on this)
- You can easily build your own reports and dashboards, as the “Any Link” object can be used for reports. You can also email to support@doculife.cloud to get access to our BETA version of the Link Anything Admin Dashboard.