

# Salesforce AWS S3 Integration

Move Salesforce files and attachments to Amazon S3, automate record-linked folders, and keep every file on the record.

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## What is the CloudFiles Salesforce AWS S3 integration?

CloudFiles is Document Automation for Salesforce. CloudFiles Document Management is the Salesforce AWS S3 integration that connects your org to your own Amazon S3 buckets, with SharePoint, Google Drive and Azure Blob available in the same managed package. Users browse, preview, upload and search AWS S3 files from the Salesforce record. Admins automate S3 folders, file moves, permissions and sharing with Salesforce Flow. Your files stay in your own storage. CloudFiles transfers them over encrypted connections and does not re-host them.

Teams look for an AWS S3 integration for three reasons: Salesforce file storage fills up, large files do not belong in Salesforce, and back-end systems already write documents into S3. CloudFiles handles all three from one install, and the same package works the same way for SharePoint, Google Drive and Azure Blob when a team uses more than one storage.

## What does the AWS S3 integration look like on a Salesforce record?

- A file browser widget on the Lightning record page of any standard or custom object, plus a Content Library tab for browsing across libraries.
- A record-linked folder in AWS S3 for every record. Folder links survive record renames.
- A tree view of attached S3 folders, search across the whole folder tree, multi-file delete, and download as PDF.
- Previews for PDF, Office files, images, video and audio, with print from preview when an admin enables it.
- Per-library conflict behavior: when a file or folder already exists in the S3 bucket, admins choose Rename, Replace, No Op or Fail.

Users work in Salesforce, in one window. They do not need the AWS console or S3 rights of their own for the widget experience.

## How do I move Salesforce files to AWS S3?

Record-triggered and scheduled Flows copy or move Salesforce Files and email attachments to AWS S3 and leave a link on the record. Legacy files can be migrated in bulk, so an org that has run on Salesforce

storage for years can move its history to Amazon S3 along with every new upload.

The Flow actions used to move Salesforce files to AWS S3:

- **Create Folder** (sync and async) and **Get Connected Folder** find or build the record's S3 folder.
- **Copy Salesforce Files** and **Move Resource** send files into that folder.
- **Copy Resources** and **Delete Resource** reorganize files already in S3.
- **Set Resource Property** and **Search by Resource Metadata** stamp record values onto S3 files and find them later.

Typical triggers are a record being created (Account, Opportunity, Case or a custom object), a stage or status change such as Closed Won, an owner or team change, or a scheduled Flow. Moves are asynchronous: the action returns nothing, and completion arrives later as a CloudFiles event that a record-triggered or platform-event Flow handles. Delete the Salesforce original only in that completion handler, so no file leaves Salesforce before it is in S3.

## How do I store Salesforce attachments in S3 and reduce Salesforce file storage costs?

Store Salesforce attachments in S3 with the same Flows. A pattern we see in insurance: folder Flows run across several objects, attachments are moved to AWS S3 as they arrive, and the Salesforce file is removed once the move completes. Users still see every document on the record through the CloudFiles widget, and the org can stop buying extra Salesforce storage for files that belong in Amazon S3.

To offload Salesforce file storage to AWS S3:

1. Connect the S3 bucket and turn on the libraries you want users to see.
2. Build a record-triggered Flow that moves new Salesforce Files and email attachments into the record's S3 folder.
3. Run a scheduled Flow or a bulk migration for the files already in Salesforce.

## How do I integrate AWS S3 for large file management?

Salesforce's own file size limits make it a poor home for drawings, video, datasets and log bundles. When you integrate AWS S3 for large file management, those files go to the record's S3 folder and users preview and download them from the record. Experience Cloud users can upload into AWS S3 from a portal without having an AWS account, which keeps large customer and partner uploads out of Salesforce storage from the start.

## Do files written straight into the S3 bucket appear in Salesforce?

Yes. AWS S3 supports event-driven sync, turned on per connection. CloudFiles sets the bucket notification for you, and a file that arrives in the bucket by any route is indexed and appears on the matching record. A pattern we see in rights licensing: back-end systems write straight into the S3

bucket, the files appear on the Salesforce record, and portal members see their own documents in Experience Cloud.

Sync covers files and folders. Metadata goes from Salesforce to AWS S3 by Flow.

## How do I connect Amazon S3 to Salesforce?

Amazon S3 Salesforce setup is short. The admin enters the bucket name in CloudFiles and deploys the CloudFormation template with an External ID, which creates the IAM role CloudFiles uses to reach that bucket.

- **Least privilege on the Salesforce side:** assign a least-privilege Salesforce permission set.
- **Two identities:** Flow automation runs as the integration identity, while the widget and Content Library run as each user through their own storage connection.
- **Fewer API calls:** the "file attached" event setting ships off. Leave file-attached events off unless a Flow needs them.

## What is the best AppExchange tool for AWS S3 document management?

The best AppExchange tool for AWS S3 document management puts S3 on the record, automates it with Flow, and covers every storage your company runs. CloudFiles does that for AWS S3, SharePoint, Google Drive and Azure Blob, with OneDrive, Box and Dropbox also supported.

| What an S3 buyer needs                 | How CloudFiles Document Management delivers it                          |
|----------------------------------------|-------------------------------------------------------------------------|
| S3 files on the Salesforce record      | File browser widget on any object, plus a Content Library tab           |
| Folder per record                      | Record-linked S3 folders that survive record renames                    |
| Move files out of Salesforce storage   | Flow actions to copy or move files and attachments, plus bulk migration |
| Files from other systems on the record | Event-driven sync from the S3 bucket, turned on per connection          |
| Secure external access                 | Share links and Experience Cloud uploads into S3                        |
| One tool for every storage             | AWS S3, SharePoint, Google Drive and Azure Blob in one managed package  |

Teams also move to CloudFiles when replacing Files Connect, Document Extractor or a sync tool that breaks on folder renames. The Business plan is \$19 per user per month, Enterprise pricing is on request, and 24x7 support is included.

## Can I share S3 files securely with people outside Salesforce?

Yes. Create Link and Update Link Settings build share links from Flow or from the widget. Links carry an email wall, a password, an email verification code and a consent step, and they can expire or carry a view

limit. Every view is tracked with location and every download is tracked per file. Share links support white-label and custom domains. For portals, Share with Community User, Remove from Community and Get Shared Resources control what each Experience Cloud user sees.

## Is the CloudFiles AWS S3 integration secure?

- ISO/IEC 27001:2022 certified, with ISO/IEC 27017:2015 and ISO/IEC 27018:2019.
- Independently audited for SOC 2 Type II.
- Compliant with HIPAA (BAA available). Compliant with GDPR.
- Hosted on AWS in four regions selected per customer account: United States, EU, United Kingdom and Australia.
- TLS 1.2 minimum in transit; AES-256 at rest on production data stores.
- Your files stay in your own storage. CloudFiles transfers them over encrypted connections and does not re-host them.

ISO certificates, the SOC 2 Type II report and a penetration test summary are available under NDA from the CloudFiles Trust Center.

## Get started

Install CloudFiles Document Management from AgentExchange and start a free 14-day trial, or book a demo at [cloudfiles.io](https://cloudfiles.io).