

Reduce Salesforce File Storage Costs with SharePoint, AWS S3, Google Drive and Azure Blob

A practical plan to offload Salesforce file storage to external storage you already own

Why does Salesforce file storage fill up?

CloudFiles is Document Automation for Salesforce, and one of the most common reasons teams install CloudFiles Document Management is that Salesforce file storage is full. Salesforce Files, email attachments, signed contracts, photos and portal uploads all count against the same allocation, and every new record adds more. When the allocation runs out, the choice is to buy extra Salesforce storage or to move files somewhere else.

This whitepaper explains how to reduce Salesforce file storage costs by using external file storage for Salesforce: SharePoint, AWS S3, Google Drive or Azure Blob. Files move out of Salesforce storage, users still open them from the record, and new files stop landing in Salesforce storage in the first place.

What is external file storage for Salesforce?

External file storage for Salesforce means the file itself lives in SharePoint, AWS S3, Google Drive or Azure Blob, and Salesforce keeps the link. With CloudFiles, every record can have its own folder in that storage. A file browser widget on any standard or custom object's Lightning record page lets users preview, upload, organize and search those files without leaving Salesforce. Previews cover PDF, Office files, images, video and audio.

Your files stay in your own storage. CloudFiles transfers them over encrypted connections and does not re-host them.

Which storage should I use: SharePoint, AWS S3, Google Drive or Azure Blob?

Choose the storage your company already runs. CloudFiles connects all four, plus OneDrive, Box and Dropbox, and one org can use more than one.

Storage	How it connects	How files reach the record
SharePoint	Service principal (app-only, no license) or integration user; access granted site by site	Live files through Microsoft's API; files added in SharePoint appear on the linked record
Google Drive	Google integration user (OAuth); My Drive and Shared Drives	Live files through Google's API
AWS S3	Bucket name plus a CloudFormation template that creates an IAM role with an External ID	Event-driven sync, turned on per connection
Azure Blob	CloudFiles Entra gallery app with Storage Blob roles; IP allowlist for network restriction	Event-driven sync through an Event Grid subscription

How do I offload Salesforce file storage to SharePoint or AWS S3?

Offloading Salesforce file storage to SharePoint or AWS S3 is a Salesforce Flow job. CloudFiles adds Flow actions for folders and files, including Create Folder, Copy Salesforce Files, Move Resource and Delete Resource.

1. **Connect the storage.** For SharePoint, connect a service principal or integration user and register the sites to use. For AWS S3, enter the bucket name and deploy the CloudFormation template.
2. **Give records their folders.** A record-triggered Flow runs Create Folder when an Account, Opportunity, Case or custom object record is created, or when its status changes.
3. **Copy or move the files.** A record-triggered or scheduled Flow runs Copy Salesforce Files to send Salesforce Files and email attachments into the record's folder, and a link stays on the record.
4. **Remove the Salesforce copy safely.** Copying files is asynchronous: the completion arrives later as a CloudFiles event. Handle that event in a record-triggered or platform-event Flow, and delete the Salesforce original after the completion event confirms the file is in storage.
5. **Keep the event load low.** The "file attached" event setting ships off. Turn it on only if a Flow needs it, since leaving file-attached events off reduces API calls.

How do I move Salesforce files to SharePoint without breaking anything?

When you move Salesforce files to SharePoint, CloudFiles works on the live files through Microsoft's own API, so there is one copy, in SharePoint. Files added in Salesforce appear in SharePoint, and files added in SharePoint appear on the record once the folder is linked. Folder links survive record renames, and your existing SharePoint folder layouts are respected.

To store Salesforce files in SharePoint with the right context, Flows write Salesforce fields onto SharePoint columns with Update Drive Columns and keep SharePoint access in step with Salesforce owners, teams and territories with Update Permissions. Users need no SharePoint rights for the widget experience when an admin designs it that way. Files Connect references are supported for SharePoint.

How do I connect Salesforce files to AWS S3 for cost savings?

AWS S3 suits high volumes and files that other systems produce. To connect Salesforce files to AWS S3 for cost savings, enter the bucket name and deploy the CloudFormation template that creates an IAM role with an External ID. Turn on event-driven sync for the connection and CloudFiles sets the bucket notification. From then on, a file that arrives in the bucket by any route is indexed and appears on the record.

For example, an insurer can run folder Flows across several objects, move attachments to S3 and remove the Salesforce file. A rights-licensing business can let back-end systems write straight into the bucket, have the files appear on the record, and let portal members see their own documents.

How do I reduce file storage costs by using Google Drive integration?

To reduce file storage costs by using Google Drive integration, connect a Google integration user through OAuth and choose My Drive or Shared Drives. CloudFiles works on the live files through Google's API, so the Drive copy is the only copy. For example, a legal team can build folder structures on Opportunity and a custom Matter object and move Salesforce files to Drive automatically. Access can be revoked from the Google admin settings at any time.

What about Azure Blob?

Add the CloudFiles Entra gallery app and assign Storage Blob roles to the CloudFiles service principal. Restrict network access with an IP allowlist. For event-driven sync, create an Event Grid subscription. A folder created by CloudFiles appears in the container once a file is uploaded into it. For example, a housing agency can create folders on status change, move signed files to Azure and write blob metadata.

What happens to the files already in Salesforce?

Legacy files can be migrated in bulk. Run a scheduled Flow over existing records to create folders and copy their Salesforce Files and email attachments into SharePoint, AWS S3, Google Drive or Azure Blob, with the same completion-event handling as above. For example, a utility can run a one-time migration of existing Case files and then copy new files as they are attached.

How do I stop new files landing in Salesforce storage?

- **Portal uploads.** With Experience Cloud, external users upload into SharePoint, Google Drive, AWS S3 or Azure Blob without an account in that storage. The files are stored there rather than in Salesforce file storage.
- **File requests.** Create File Request collects files from customers straight into the record's folder.
- **Outbound sharing.** Share links replace email attachments, with an email wall, password, email verification code, consent step, expiry and view limit. Every view is tracked with location and every download per file.

Is external storage secure enough?

- 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.

Security documents, including the 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.