

Drive Your Files - Release Notes

Version 1.4 (Current Version)

This release focuses on automation, providing users and administrators with a zero-setup feature for managing file uploads based on specific Salesforce record conditions.

Enhancements

Major New Feature: Automatic Upload to Google Drive

- Introduced the Automatic Upload feature which allows files to be seamlessly uploaded to Google Drive whenever specific business conditions are met on a Salesforce record (e.g., when an Opportunity stage changes or a Case is closed).
 - *Administrator Note:* This feature is powered by a configurable Flow template, eliminating the need for manual user intervention for file syncing.
- Expanded Object Compatibility: Automatic Upload is fully supported across all Standard Objects (including Leads, Opportunities, Cases, Contacts, and Accounts) and Custom Objects where the DYF integration is enabled.

Specific Lead Conversion Logic

- Optimized Lead Conversion Process: When the Automatic Upload is configured to trigger upon Lead conversion, the DYF process now executes before the native Salesforce Lead conversion process.
- This ensures all files attached to the original Lead record are successfully uploaded to Google Drive.
- The newly created Account and Contact records will start clean (without files attached directly to the records) while the files remain accessible via the Lead's Google Drive folder.
 - *Access Note:* The Google Drive folder remains linked to the converted Lead record, which may require an administrator to enable the "View and Edit Converted Leads" permission for specific users who need direct folder access.

Bug Fixes

- None reported in this release.

Known Issues

We are currently investigating the following limitations and issues:

- File Size Limitation: Files exceeding 13MB may fail to upload to Google Drive through the DYF integration. We are analyzing solutions to support larger file sizes in a future release.

Version 1.3 (Previous Version)

Enhancements

- Enhanced user experience by including record names alongside record IDs in Google Drive folder names when a folder is created for the first time after a file upload.
- Updated the functionality of the "Go to Google Drive Folder" button to correctly navigate users to the associated Google Drive folder for the currently opened record.
- Added logic to ensure the "Go to Google Drive Folder" button continues to work even if the folder has been renamed in Google Drive, preserving the link without interruption.
- Introduced an error message that informs users when no Google Drive folder is associated with a record, triggered if the "Go to Google Drive Folder" button is clicked before any files have been uploaded for the opened record.

Bug Fixes

- Resolved an issue where the confirmation message was not displayed after a successful upload.

Known Issues

- We are aware of an issue where the "Delete Files from Google Drive" button does not remove files from Google Drive as expected. A fix will be implemented in the next release.
- We are currently investigating ways to remove the "New" button from the Google Drive related list to prevent issues when the button is not manually removed from the page layout.