

Google Drive Datasheet for Salesforce Users

Easy Salesforce integration for google docs, sheets, slides & more...



1 - Access Google drive files & folders from any standard or custom object LWC



2 - Share using G-drive or CloudFiles links, dataroom & experience cloud LWC



3 - Security & Analytics options available when using CloudFiles links



4 - Automate using flow actions, platform events, custom objects & Apex



5 - Special features for G-Drive including generation, DocGPT, tagging etc...



6 - Use-Cases that most of our Google Drive users usually use the app for

Works With



Google Docs



Google Slides



Google Sheets



available on
AppExchange

1 - Easy access for Google Drive Users

Browse, Upload, Manage, View, Permissions & more file & folder management options



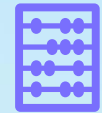
Browse connected folders from within Salesforce objects



Upload files into folders without size or type restriction from Salesforce



Manage files & folders from within objects through a plethora of actions



Permissions from google drive respected through individual user login



available on
AppExchange

1.1 - Associate & Browse Folders (or Files) using LWC



Access Google Drive from standard or custom objects and associate files & folders

DetailsNewsFiles

Unipart Demo

Search in this folder...

Settings

Unipart Demo

Upload FilesNew Folder

Name	Created On	Created By	
lorem-ipsum-2023-04-13-17-25-53.docx	06/08/2023	Siddharth Garg	⌵
Biz Architecture.pptx	06/08/2023	Siddharth Garg	⌵
1626209958321.jpg	06/08/2023	Siddharth Garg	⌵
snovio_8_jun_sent_with_linkedin_url.xlsx	06/08/2023	Siddharth Garg	⌵
Babel Demo 4	04/19/2023	Siddharth Garg	⌵
HubSpot NA Demo	04/19/2023	Siddharth Garg	⌵
2023-4 Monthly SC Report.png	06/02/2023	Siddharth Garg	⌵

Folder is actually located in Google Drive

Can upload, create folders, search, drag-n-drop and do a bunch of other things

All contents of folder accessible from the LWC

Preview, Edit, Replace, download and many other file & folder operations

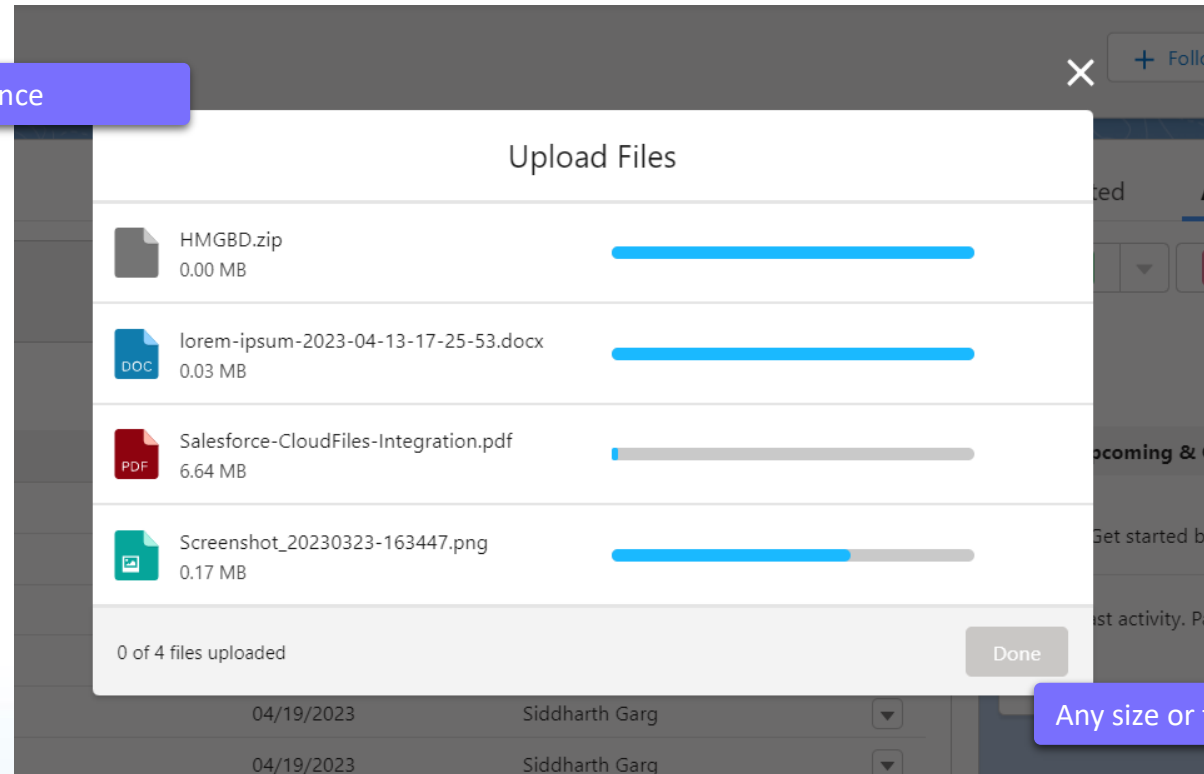


1.2 - Upload from Salesforce or Google with 2-way sync



Uploaded files are sent to respective Google Drive folder. Vice-versa works instantly as well.

Multiple files can be uploaded at once



Any size or type of files is supported



available on
AppExchange

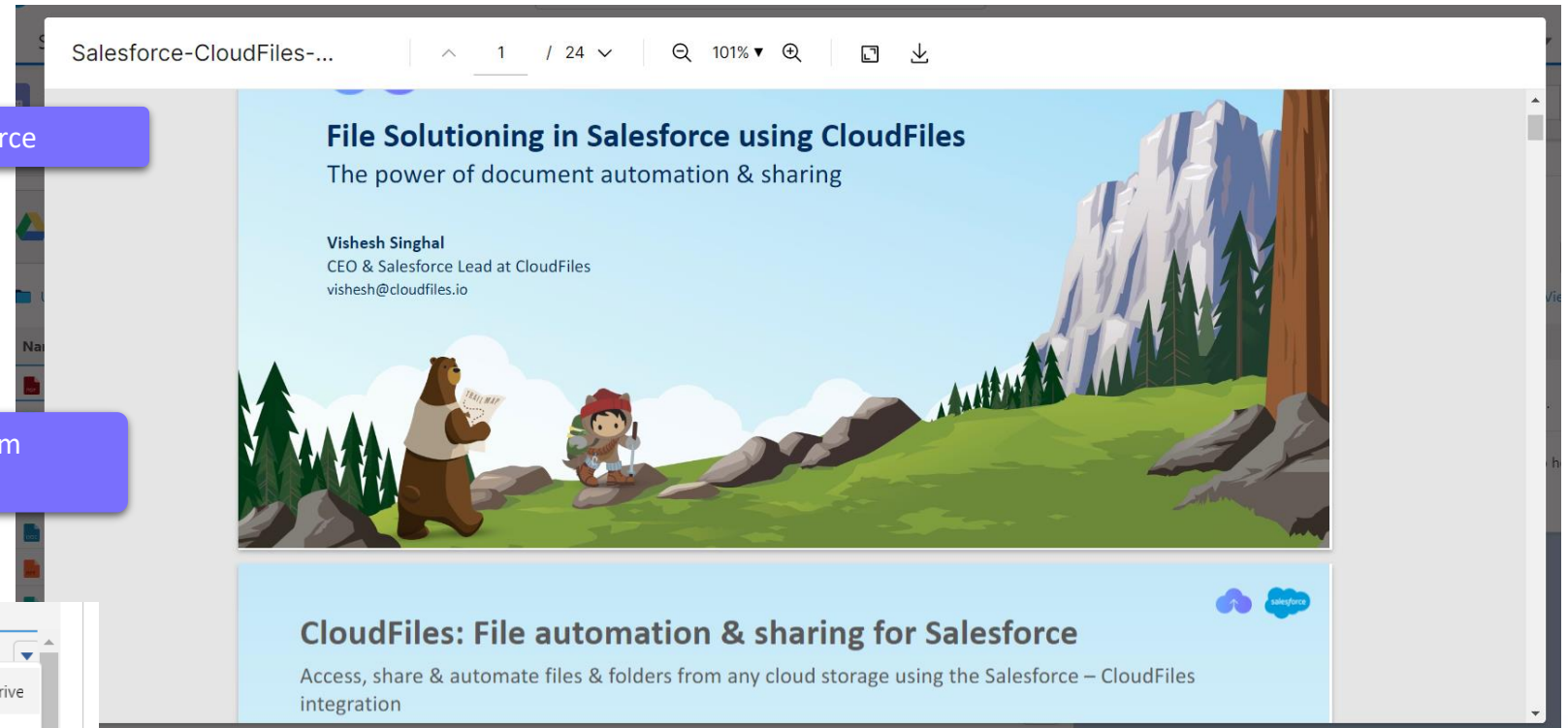
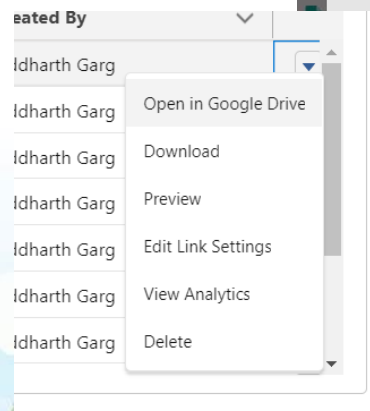
1.3 - Preview, Edit, Download, Go To & More...



Plethora of file & folder management options to operate on google drive from Salesforce

Preview any type of file without ever leaving Salesforce

Open files in Google editor directly from Salesforce LWC



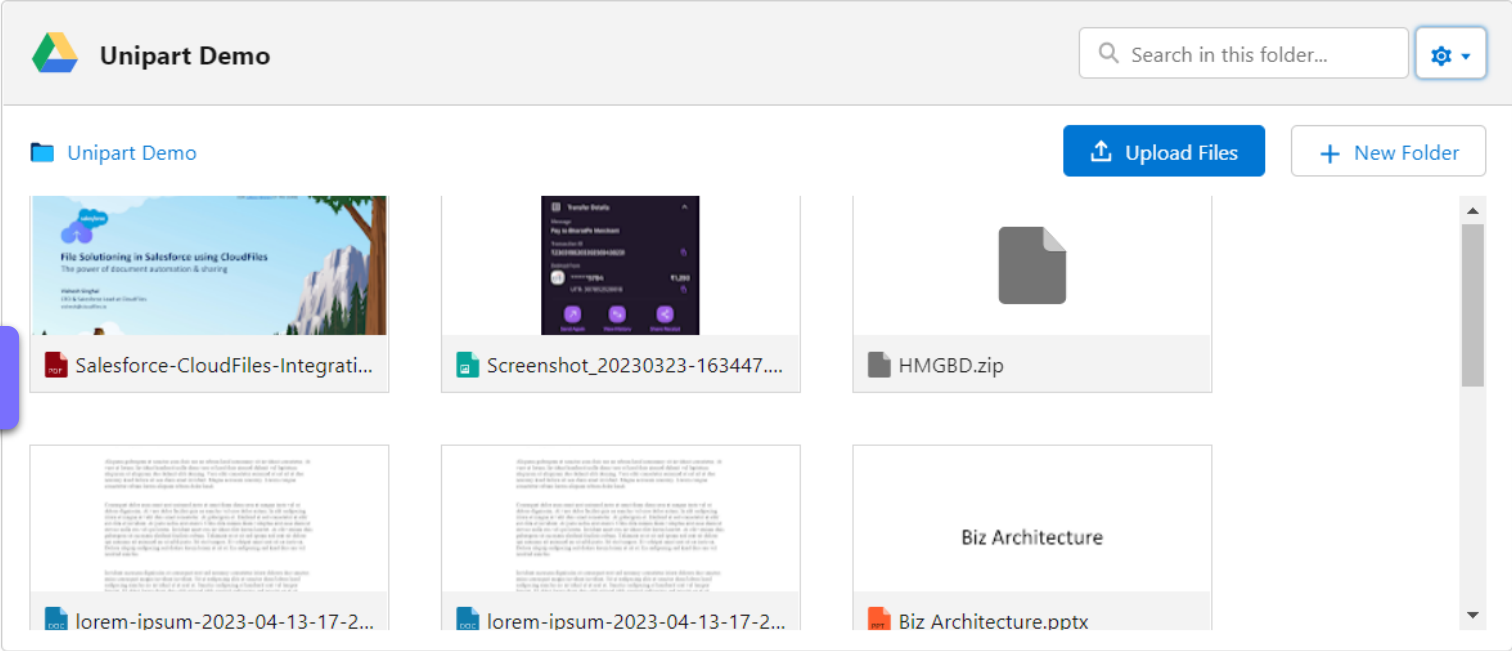
Download, Delete, rename and other functionality available as well.



1.4 - Grid View of LWC for easy file browsing

View your file thumbnails in our grid view. Provides easy viewing experience.

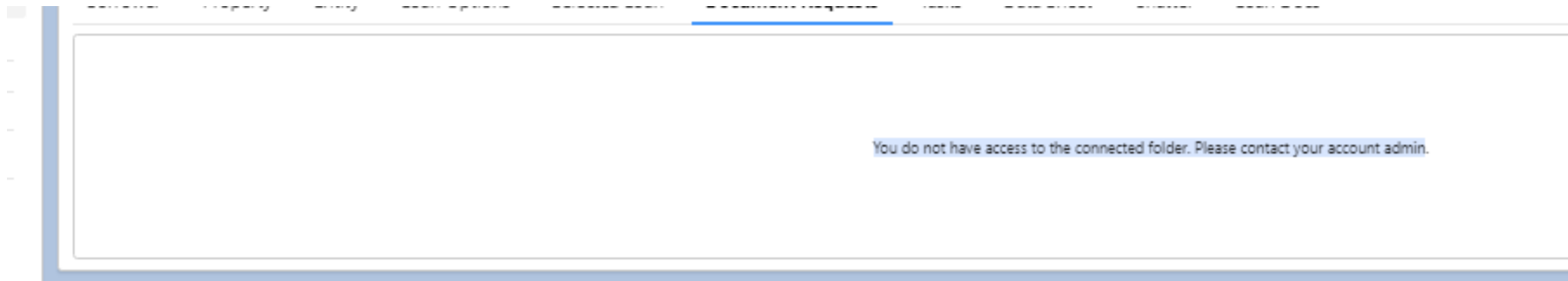
Thumbnails view for files. Especially useful when you have a lot of photos.



1.5 - Permission Control for Google Drive Access

User-level permissions in Google Drive are respected by CloudFiles LWC

Users use their own credentials to access files through the LWC, thus CloudFiles respects googled drive permissions by default without any overhead setup



2 – File & Folder sharing options for Google Drive

Share as google links, CloudFiles links, datarooms or using experience cloud LWC



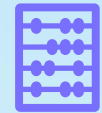
Drive links accessible using LWC to share files with standard google features



CloudFiles links with additional security & analytics settings for sharing



Datarooms to consolidate files and share as a single link from Salesforce



Community sharing using LWC with granular control on permissions



available on
AppExchange

2.1 - Share Files as Google Drive Links

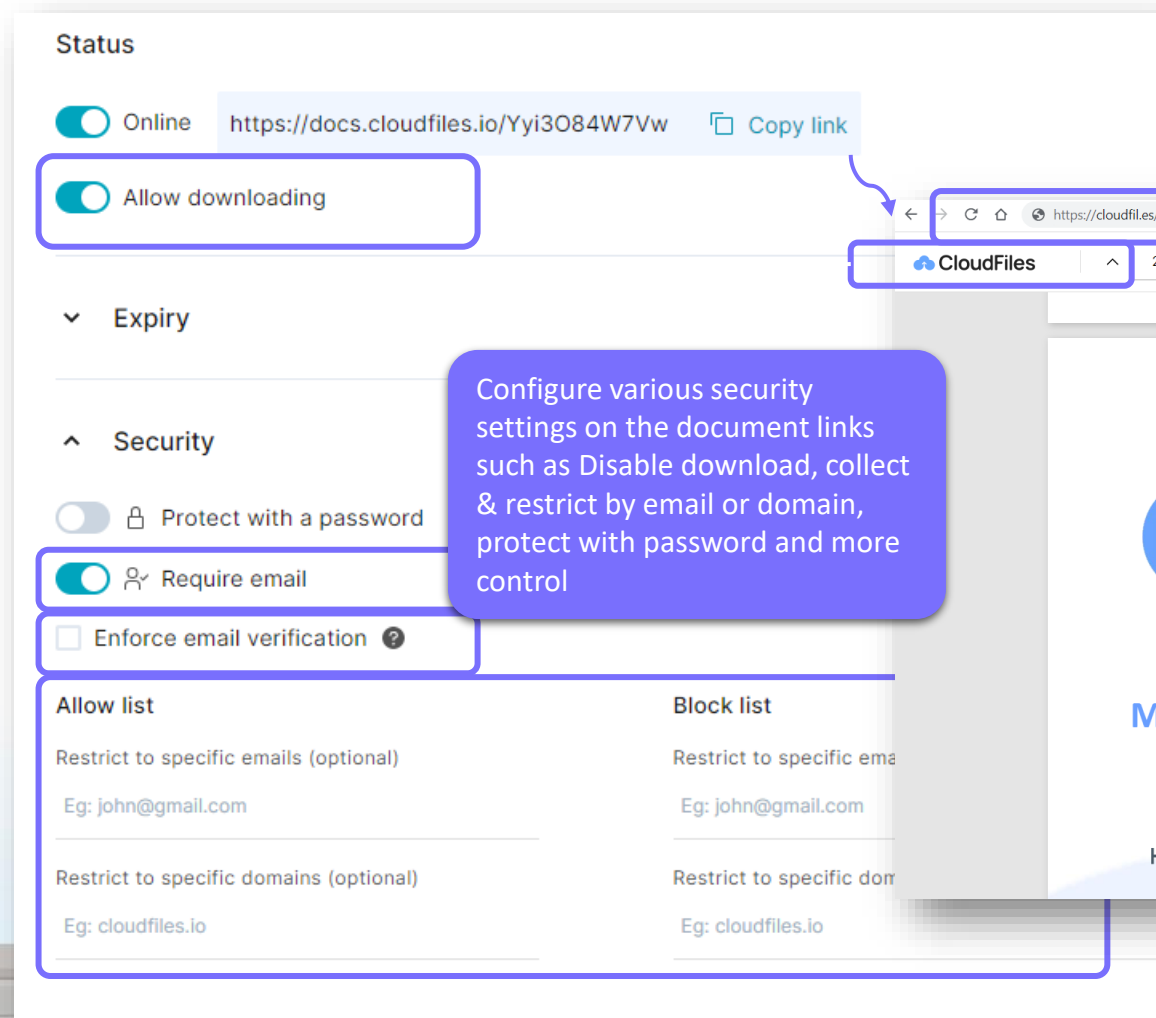
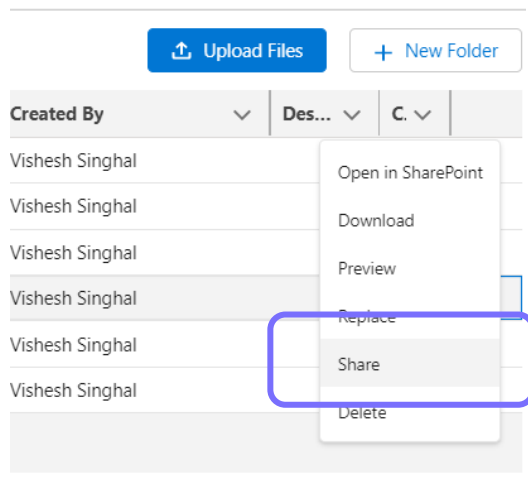


Public google drive links of files & folders can be created & accessed from Salesforce LWC



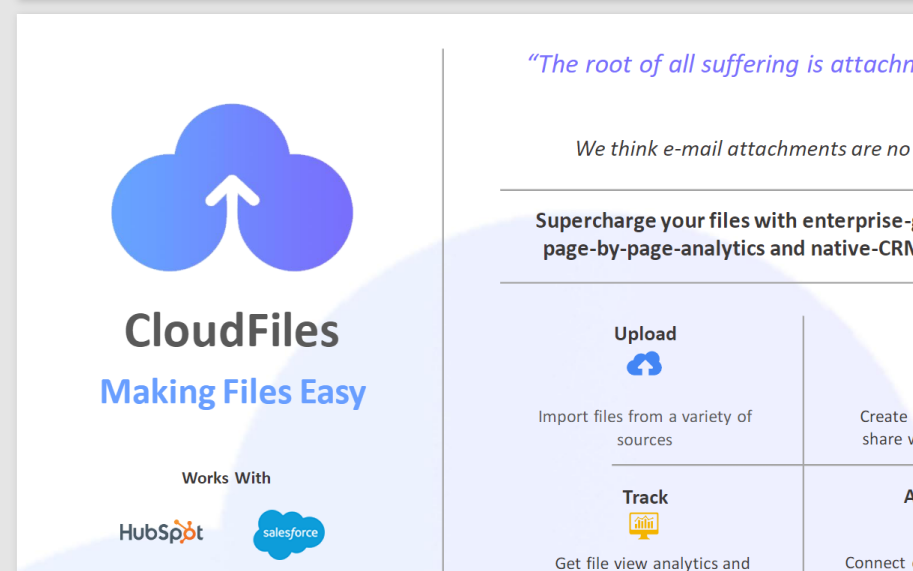
2.2 - Share Files as CloudFiles Links

For more security & analytics on shared content, CloudFiles public sharing links can be used



View file / folder online as a link.
Use custom logo and domain for a
wholesome customer experience

Configure various security
settings on the document links
such as Disable download, collect
& restrict by email or domain,
protect with password and more
control



2.3 - Share as datarooms for greater control

Space to add files, folders and file requests. Share in a consolidated way with single link.

CloudFiles

Auto-create and configure dataroom from Salesforce objects. Add live content from any cloud library for consolidated sharing

Mo50 Test

Home

Upload Passport

The files uploaded by the client here go to SharePoint directly and show request feature



Viewers will be able to upload files here

Test

Duality_Of_Being

CloudFiles

Dataroom links can be shared and re-shared when content updates happen. Avoid file jungle in emails.



2.4 - Experience cloud sharing with granular access control

Choose files & permissions for community users. Experience cloud LWC to view & upload.

The screenshot displays the Salesforce Experience Cloud interface. At the top, there is a search bar and a navigation menu with links for Home, Sales, Marketing, and Resources. Below the navigation bar, a lead record for 'Mr. Test Lead' is shown, including fields for Title, Company, Phone, and Email. A '+ Follow' and 'Conver' button are visible. The main content area features a file sharing LWC for 'Mr. Test Lead'. This LWC includes a search bar 'Search in this folder...', an 'Upload Files' button, and a '+ New Folder' button. Below these, a table lists the contents of the folder:

Name	Owner	Uploaded On
subfolder 1	Vishesh Singhal	11/10/2022
bill.pdf	Vishesh Singhal	11/10/2022
sample2.docx	Vishesh Singhal	11/10/2022

At the bottom of the LWC, there are tabs for 'DETAILS' and 'RE'. A blue callout box points to the LWC, stating: 'LWC can be inserted on Experience cloud and connected to internal salesforce object'. Another blue callout box points to the file list, stating: 'Choose which files & folders community users can see / edit etc...'. A third blue callout box points to the 'Upload Files' button, stating: 'Give upload & folder creation control to community users if required'.

3 – Security & analytics on top of Google Drive

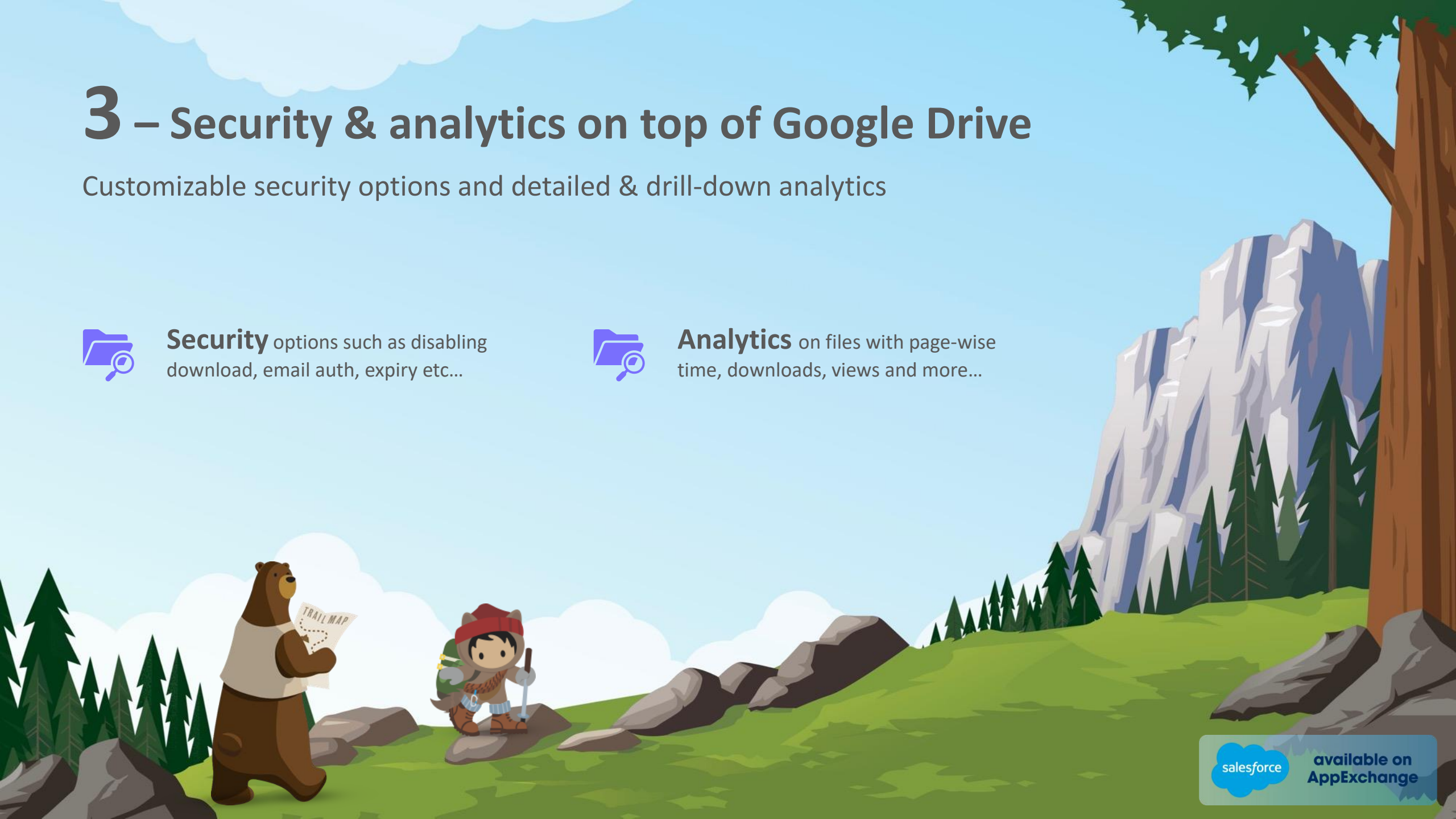
Customizable security options and detailed & drill-down analytics



Security options such as disabling download, email auth, expiry etc...



Analytics on files with page-wise time, downloads, views and more...



available on
AppExchange

3.1 - Customizable Security Settings for Sharing

Set various security settings including download control, expiry, email access control etc...

Status

☒ Online

<https://docs.cloudfiles.io/Yyi3O84W7Vw>

[Copy link](#)

☒ Allow downloading

▼ Expiry

^ Security

☐ Protect with a password

☒ Require email

☐ Enforce email verification

Allow list

Restrict to specific emails (optional)

Eg: john@gmail.com

Restrict to specific domains (optional)

Eg: cloudfiles.io

Block list

Restrict to specific emails (optional)

Eg: john@gmail.com

Restrict to specific domains (optional)

Eg: cloudfiles.io

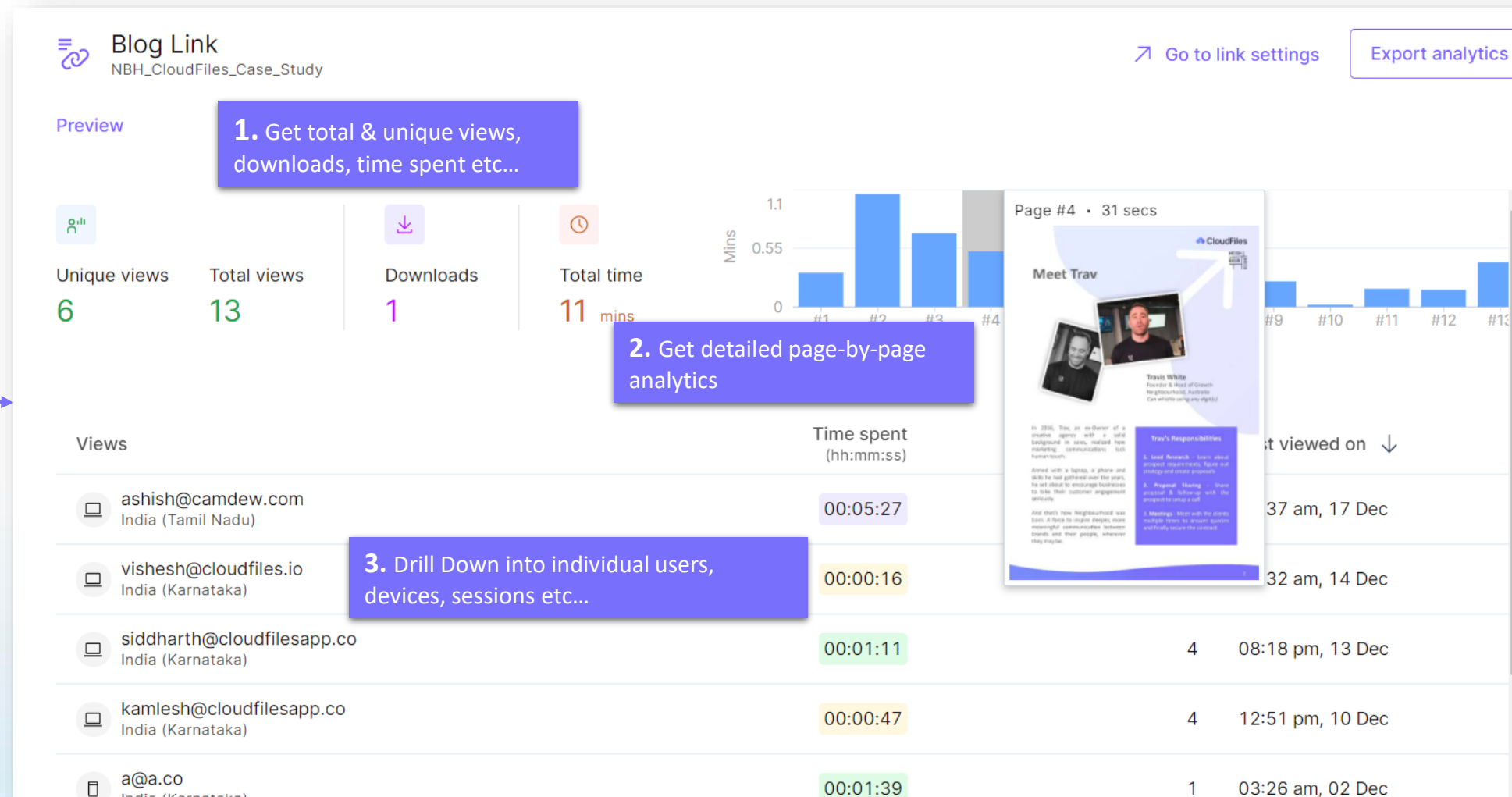
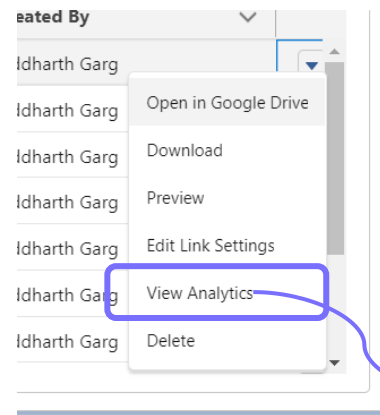
Configure various security settings on the document links such as Disable download, collect & restrict by email or domain, protect with password and more control

Update settings on the go from Salesforce objects

3.2 - Collect detailed & drill-down analytics on shared files



Collect time spent, page-wise analytics, views, downloads and more engagement data



4 – File Automations for Google Drive Users

Plethora of flow actions, platform events, custom objects and Apex / API support



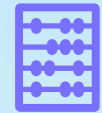
Flow actions that can be chained together to create complex use-cases



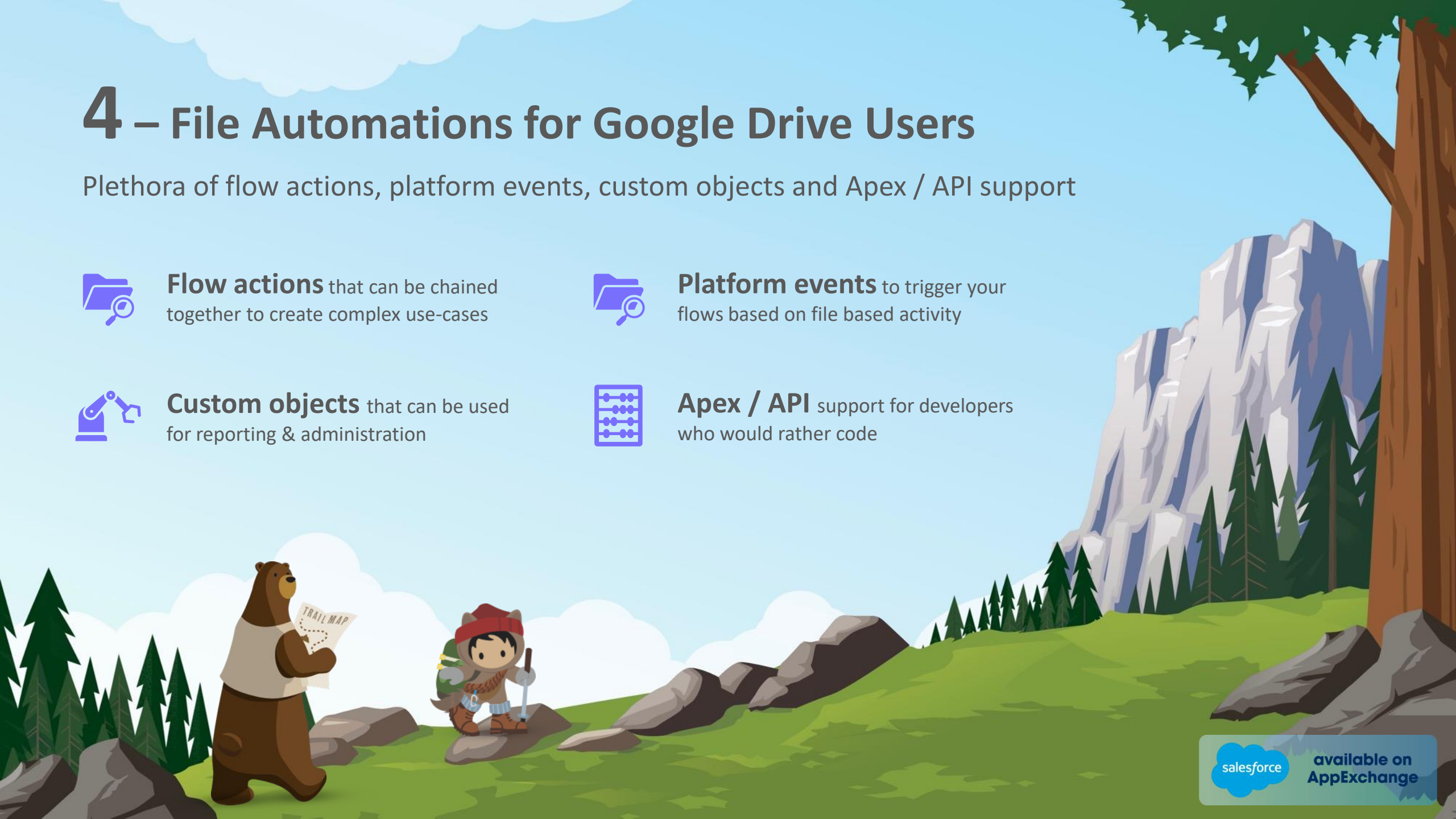
Platform events to trigger your flows based on file based activity



Custom objects that can be used for reporting & administration



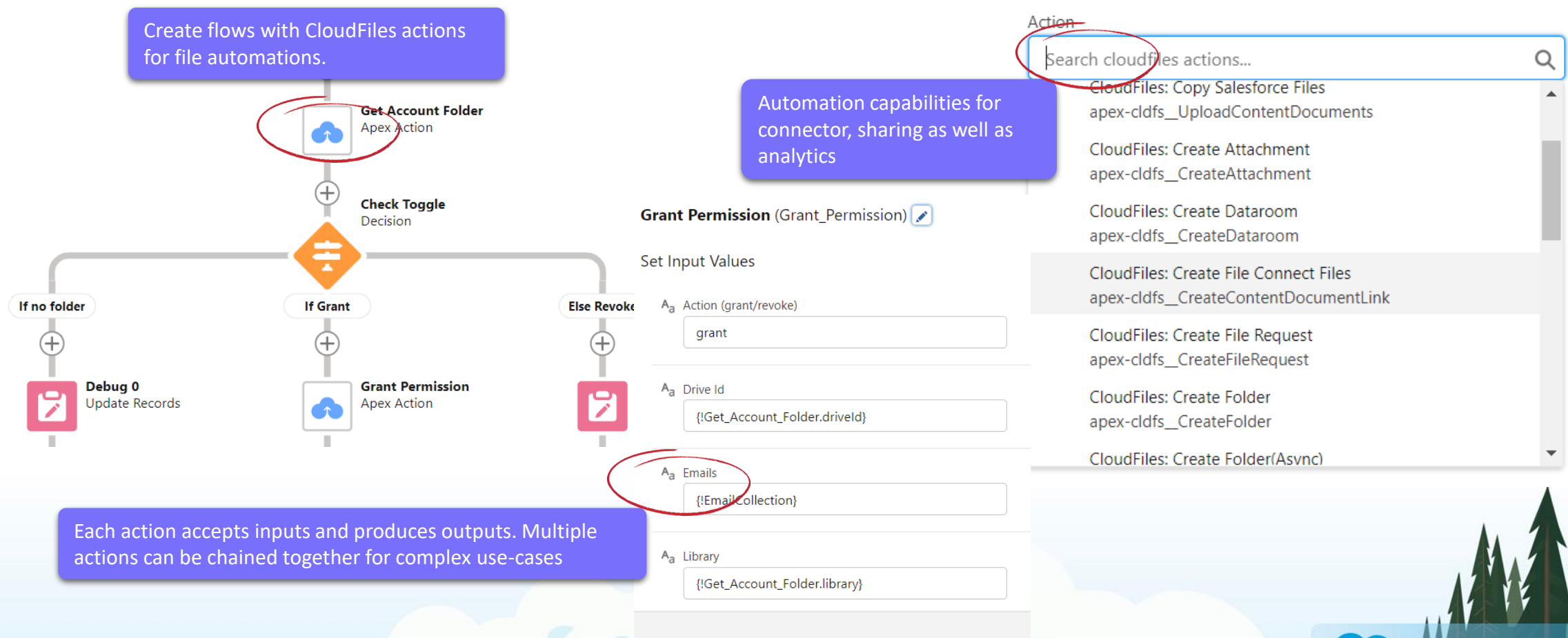
Apex / API support for developers who would rather code



available on
AppExchange

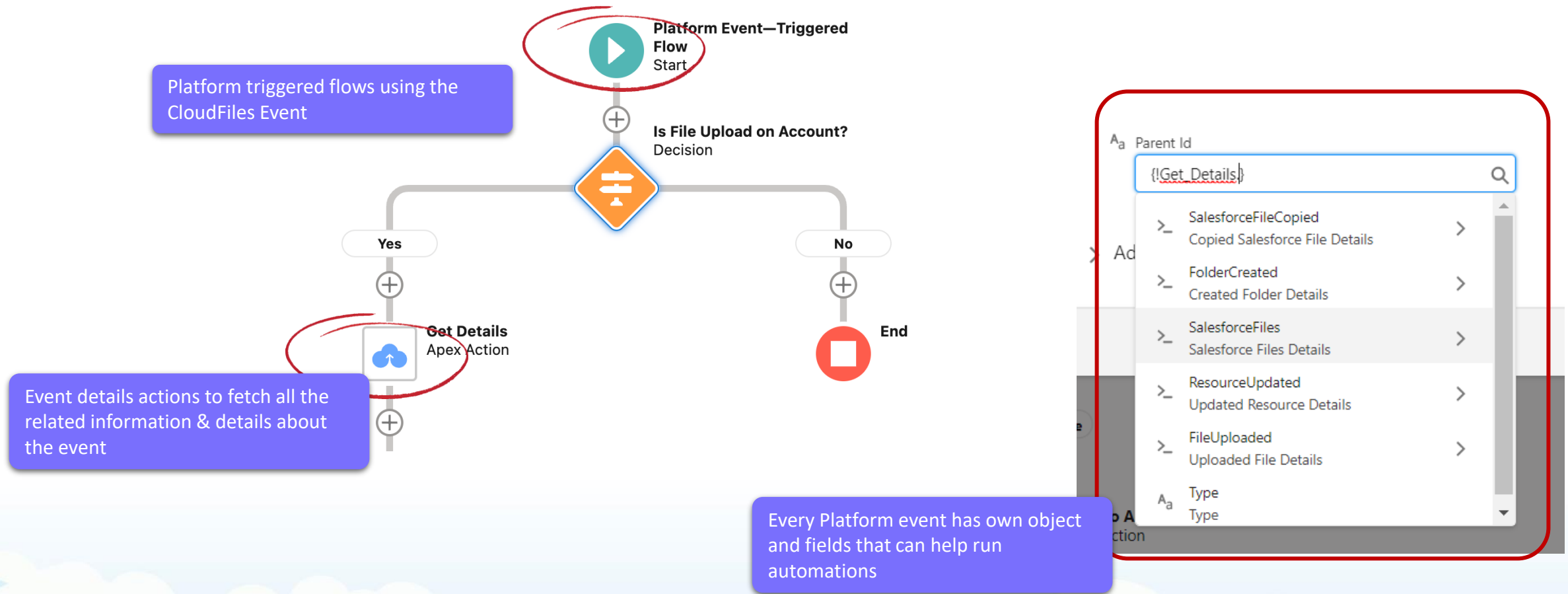
4.1 - Customizable & Modular Flow Actions

Many flow actions with inputs & outputs that can be chained together for complex processes



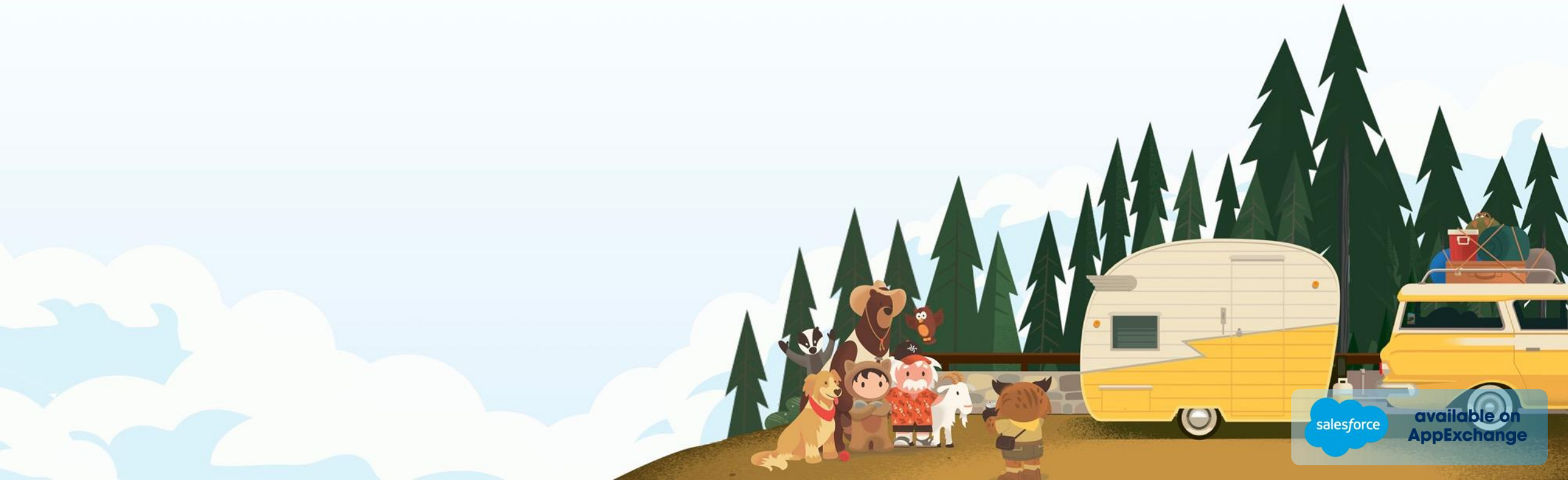
4.2 - Platform Events for more automations...

The CloudFiles event can help trigger flows on various file related activities



4.3 - Custom Objects for Reporting

Optional custom objects for file activities, analytics, uploads etc... for reporting



4.4 - Apex & API Support



Create external sharing links for files & folders. Set various security settings

All automation actions also supported using Apex, Rest API and Javascript SDK for developers wanting to use code

Apex

```
List<cldfs.Types.CreateFolderInput> inputs = new List<cldfs.Types.CreateFolderInput>(
    new cldfs.Types.CreateFolderInput('01PLJOYLOAWJBFGSE7FHK5AKOSIMDIO6H',
    'TestFolder', 'b!ZfA15HRS1Uy9pH3Vw5tFjAHfP1lRYlZAvDwLnHYYq8sa-L6ejXB-TJbMYUxilQfL',
    null)
);
List<cldfs.Resource> folders = cldfs.Client.createFolders(
    inputs,
    'sharepoint',
    'integrationUser'
);
```

```
Curl JS Python Ruby

var myHeaders = new Headers();
myHeaders.append("Accept", "application/js

var raw = "{\n    \"name\": \"test link\",
    \"resource\": \"63231ca46ecb0f69b4f523ba\"
    \"resourceType\": \"file\", \n    \"setting
    \"isActive\": true, \n    \"allowDownlo
    true, \n    \"expireAt\": 1728698842000
    \"maxViews\": 1000, \n    \"requirePass
    false, \n    \"password\": \"\", \n
    ...
```



available on
AppExchange

5 – Special features by CloudFiles for Google Drive users

Generation, GPT, OCR & Tagging, especially for the Google Drive Users



Generate google docs, sheets or slides from Salesforce data



DocGPT to ask questions and get answers on the file being viewed



OCR to detect text and update fields in Salesforce objects automatically



Tagging to easily discover and draw insights from files & folders



available on
AppExchange

5.1 - Document Generation for Google Drive

Generate documents from templates and pull Salesforce data using merge fields

Document generation via merge fields that can pull in Salesforce data and create documents in Google Drive

INVOICE

LOGO

• CF(AccountName) CF •

• CF(AccountStreet) CF •

• CF(AccountCity) • • CF(AccountState) •

• CF(AccountZipCode) CF •

• CF(DATE) CF •

INVOICE NO.

BILL TO

<Contact Name>

<Client Company Name>

<Address>

<Phone>

<Payment terms (due on receipt, due in X days)>

SHIP TO

<Name / Dept>

<Client Company Name>

<Address>

<Phone>

DESCRIPTION	QTY	UNIT PRICE	TOTAL
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00

English (United States) Accessibility: Investigate Add-ins loaded successfully Focus

5.2 - File & Folder Tagging (Manual & Automated)



Tag your files and folders automatically or manually and perform actions post-tagging

1. Define your custom columns as per your business use-case

	Name	Created On	Created By	Description	Asset Type	
1	 Contacts	06/02/2023	Vishesh Singhal	Internal Folder		
2	 Opportunities	06/02/2023	Vishesh Singhal			
3	 1626209958321.jpg	06/09/2023	Siddharth Garg	Complete	Invoice	
4	 Battlecard_HubSpot - proposal.pdf	06/09/2023	Siddharth Garg		Proposal	

Update columns manually from Salesforce LWC

Flow Actions to update columns automatically & platform events to trigger flows when columns are updated

5.3 - DocGPT for Google Drive Files

GPT-Based chatbot trained on the file being viewed for quickly finding relevant answers



CloudFiles

1 / 8



100%



Subscribe updates



Directory of Institution - Standalone Institution

Survey Year:

State	District	Institution Type	Institution Name	Address	Website	Management	Year of Establishment	Location	Upd
1	2	3	4	5	6	7	8	9	
Andhra Pradesh	Anantapur	Technical/Polytechnic	GOVT POLYTECHNIC FOR WOMEN HINDUPUR (Id: S-542)	Near Guddam temple, hindupur, hindupur	www.govtpolyforwomenhindupur.ac.in	State Government	1985	Urban	2019
Andhra Pradesh	Anantapur	Teacher Training	Hailee Institute of Education and Training (Id: S-14413)	PLOT NO 4-1 NEAR KURLAPALLI GATE, KALYANDURG, ANANTHAPURA MU DIST, PLOT NO 4-1 NEAR KURLAPALLI GATE, KALYANDURG, ANANTHAPURA MU DIST, KALYANDURG	http://www.haileet.in	Private Un-Aided	2012	Rural	2019
Andhra Pradesh	Anantapur	Teacher Training	Haindavi Institute of Education and Training (Id: S-14411)	Near Motumaria Village, Dharmavaram, Anantapuramu dist, Near Motumaria Village, Dharmavaram, Anantapuramu dist, Dharmavaram	http://www.haindavi.in	Private Un-Aided	2012	Rural	2019
Andhra Pradesh	Anantapur	Nursing	JEEVAN JYOTHI HOSPITAL SCHOOL OF NURSING ANANTAPUR (Id: S-	#15/381, KAMALA NAGAR, ANANTAPUR		Private Un-Aided	2004	Urban	2019
Andhra Pradesh	Anantapur	Teacher Training	Jnana Bharathi Elementary Teacher Training College (D.Ed.), Kalyanadurg (po) Ananthapur District - 515761 (Id: S-	D.No. 9B/233, Dodagatta Road,, Kalyandurg	www.jnanabharaticeo.com	Private Un-Aided	2007	Urban	2018
			K.C. Narayana Teachers Training						

Doc GPT



What is CloudFiles?



CloudFiles is a cloud-based file storage service that allows users to store and manage their files remotely on the internet. It eliminates the need for local storage devices and provides the flexibility of accessing files from anywhere with an internet connection. CloudFiles typically offer features such as file synchronization, file sharing, version control, and security options like encryption and access controls. Users can access their files through web browsers, dedicated applications, or APIs provided by the cloud storage provider.

Ask a question



Ask a question and get an answer using CloudFiles' DocGPT integration, trained on your file(s)



available on AppExchange

5.4 - GPT Based OCR for Google Drive Uploads

OCR to read any image and give relevant answers that can be used to automate data-entry

Mr. Richard Childress
425 Industrial Drive
Welcome, NC 27374

11-21-2007

Dear Mr. Childress,

Earlier this week I was driving back to Colorado and needed to spend the night in Utah before making the final leg home. On Sunday morning (Nov 18, to be exact) I turned on the television, with much anticipation, to watch ESPN since I have no TV reception at my foothills home west of Denver.

Much to my disappointment the program I watched featured you not only hunting elk (on Vancouver Island) but attempting to complete the North American "Grand Slam" of killing 29 different animals around the continent.

To me, and most of the people I know, the recreational killing of animals is a cruel and unnecessary hobby that sends the wrong signal to our children and future generations.

I hope you will take this opportunity to stop hunting, all together, for the benefit of everyone - including your loyal NASCAR fans! Will you do this?

Sincerely,



Input a file or an image with some text and ask a question to GPT

Get reliable answers and automate data-entry into Salesforce fields

"prompt": "what is this file about",

"answer": "This file is a letter addressed to Mr. Richard Childress discussing the issue of recreational killing of animals and how it sends the wrong signal to children and conservation efforts. The context also mentions watching a program about elk hunting on Vancouver Island and completing the \"Mo American brank \$laa\" of killing 20 lifelike animals around the country."



6 – Use-cases for Google Drive – Salesforce integration

Automated foldering, secure sharing, view notifications and more...



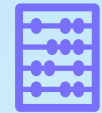
Foldering using customizable automations for clean hierarchies



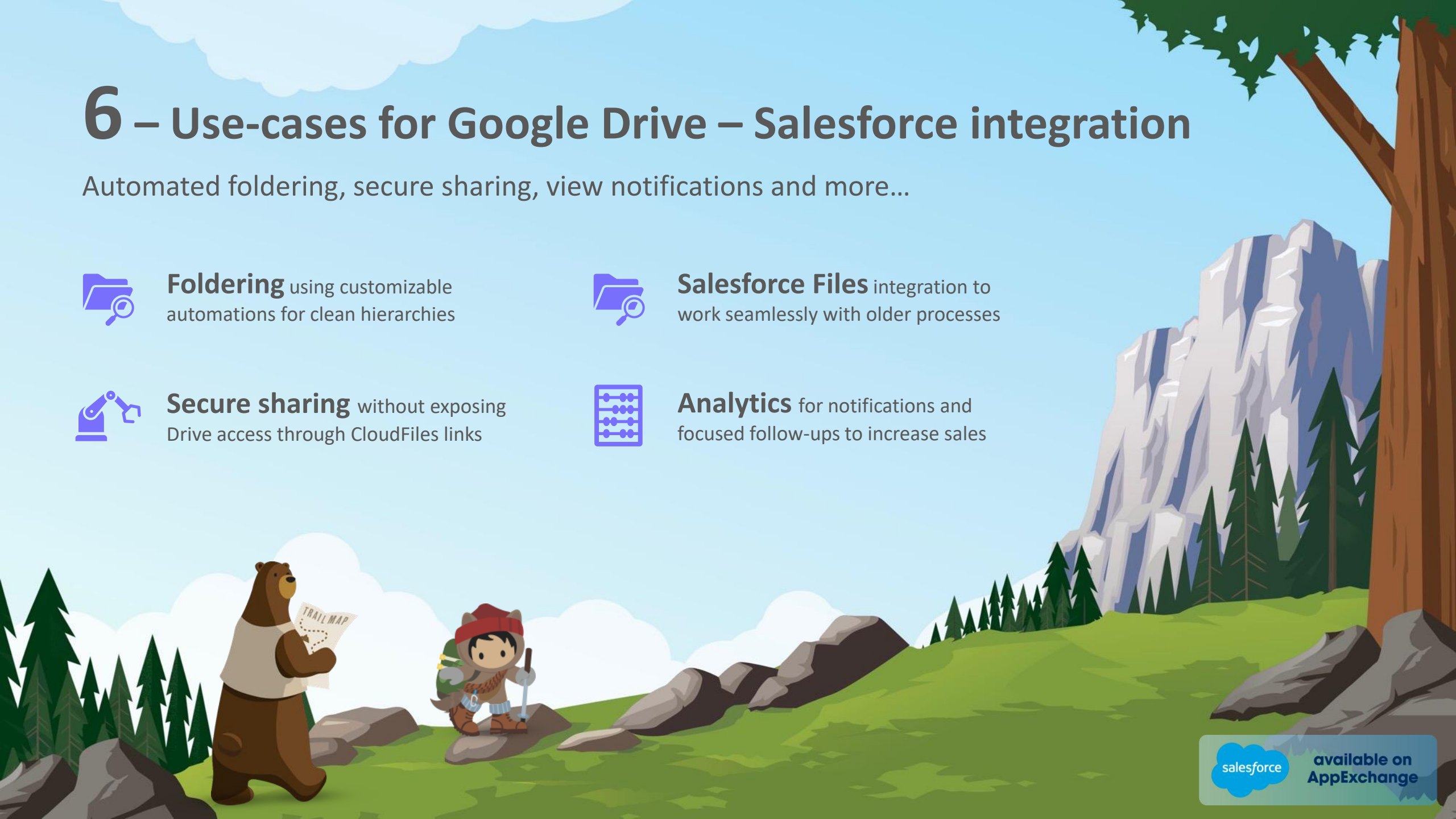
Salesforce Files integration to work seamlessly with older processes



Secure sharing without exposing Drive access through CloudFiles links



Analytics for notifications and focused follow-ups to increase sales

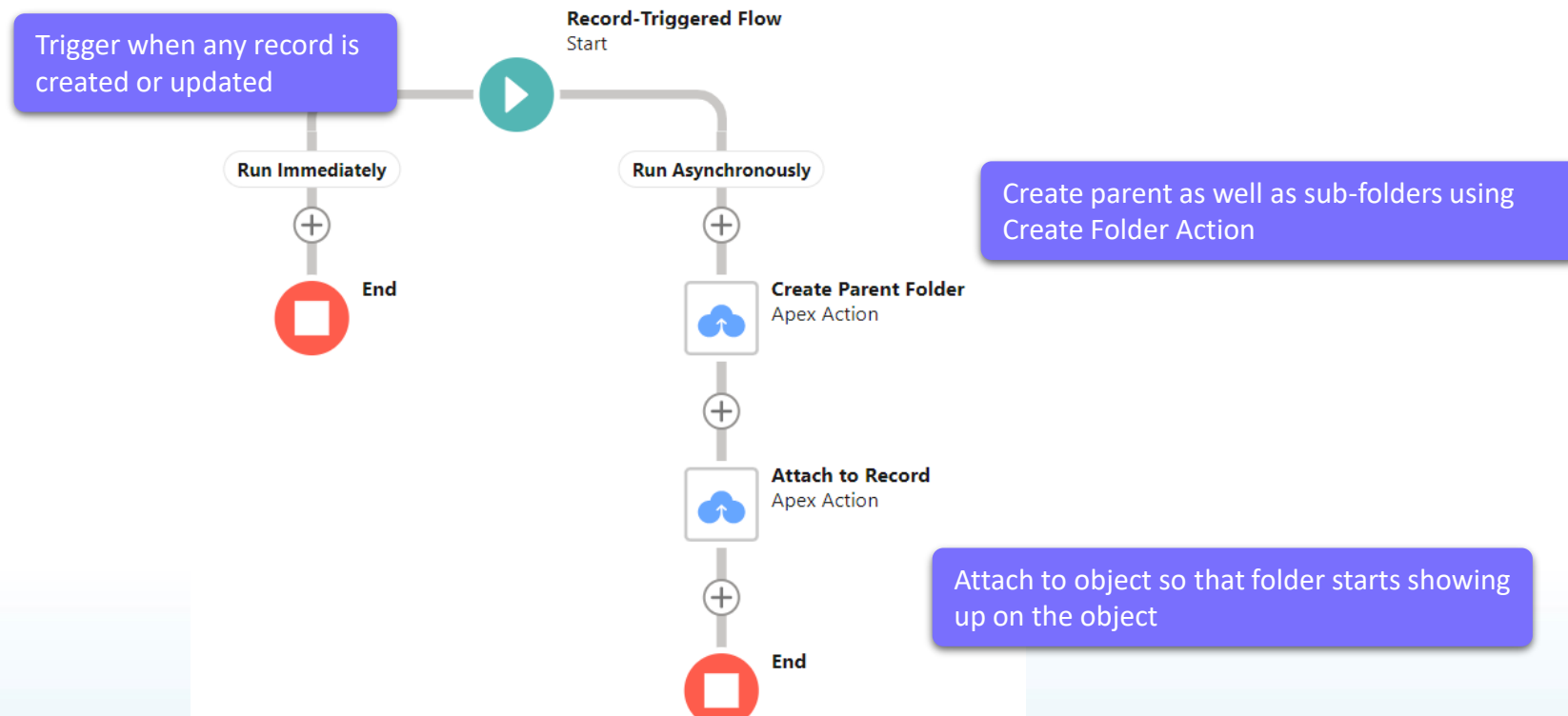


available on
AppExchange

6.1 - Maintain clean folder hierarchies using automations



Flow actions for folder hierarchies as per object relationships & sub-folder requirements

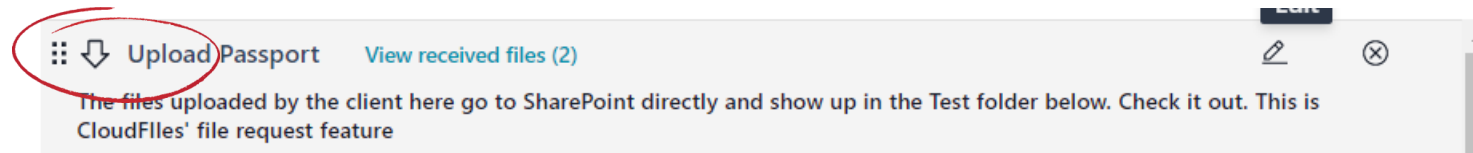


available on
AppExchange

6.2 - Collect documents without exposing drive access

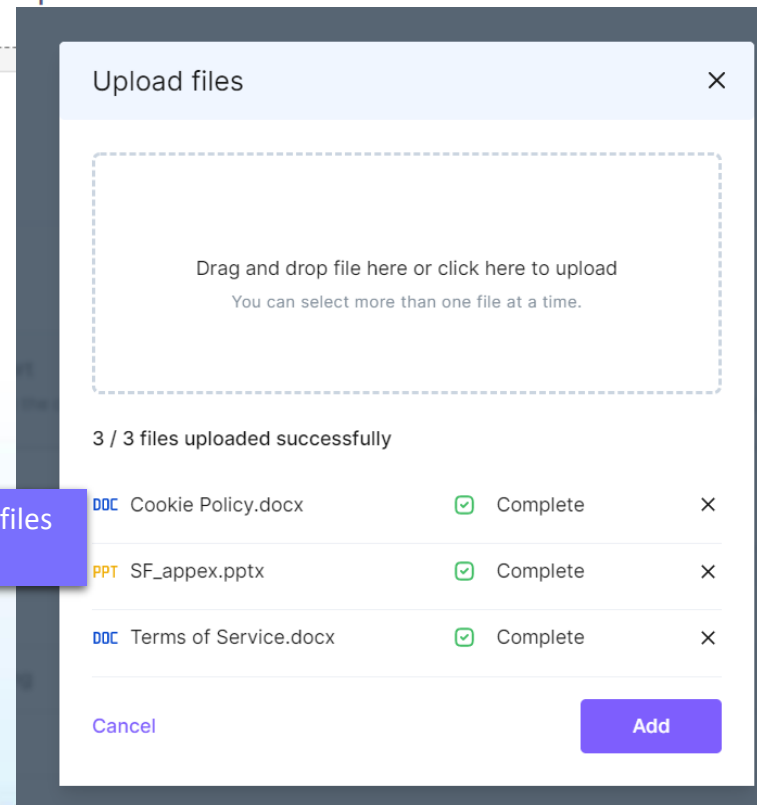


Request documents from external parties and have them go to correct folders

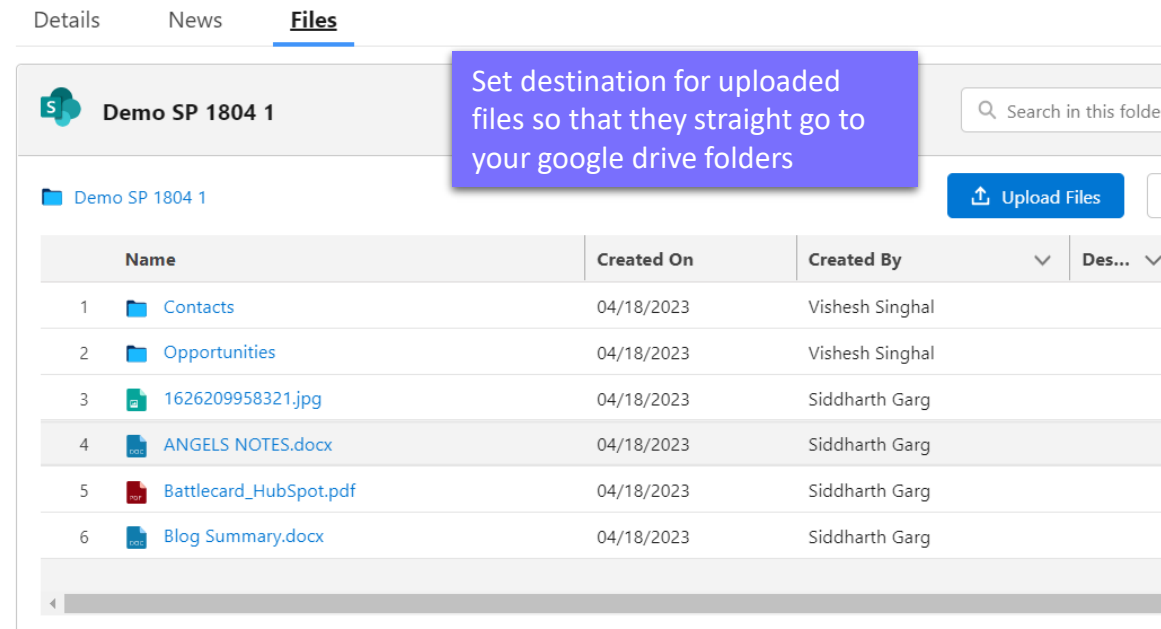


Create file request blocks where customers can upload multiple files

Viewers will be able to upload files here



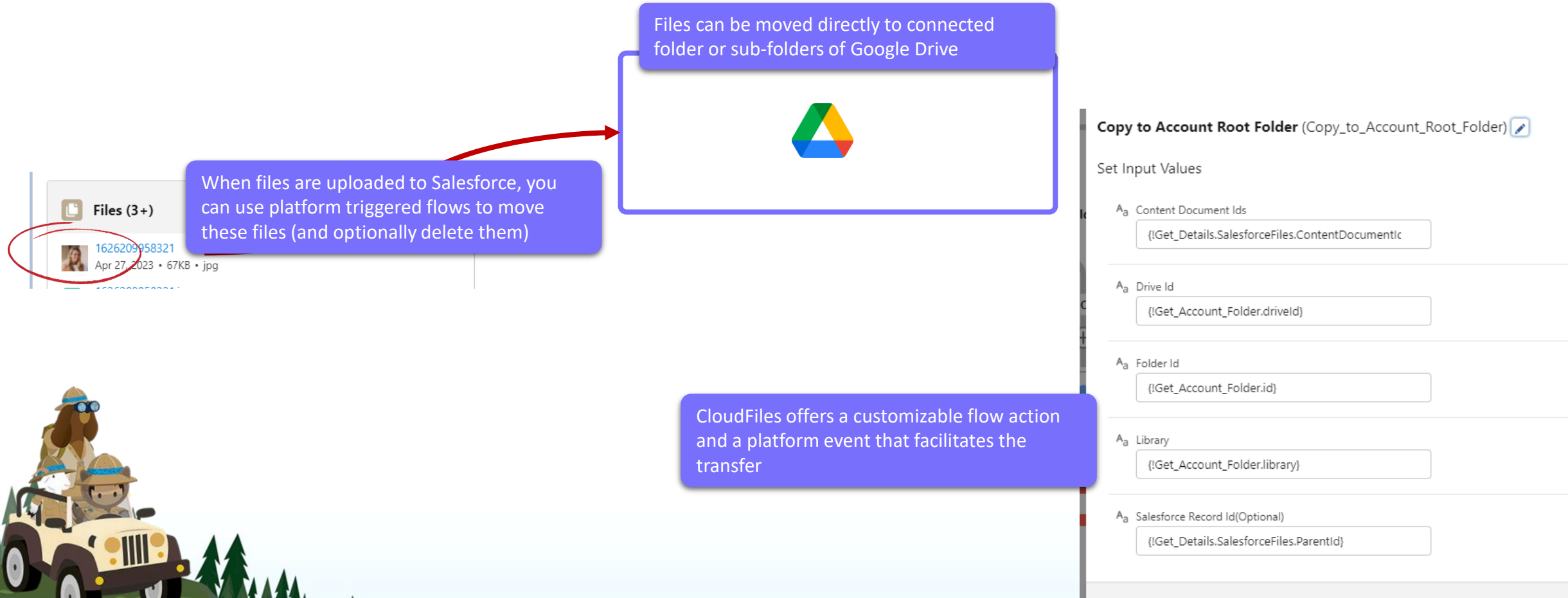
Clients can upload multiple files at once



6.3 - Move SF files to Google Folders using custom logic



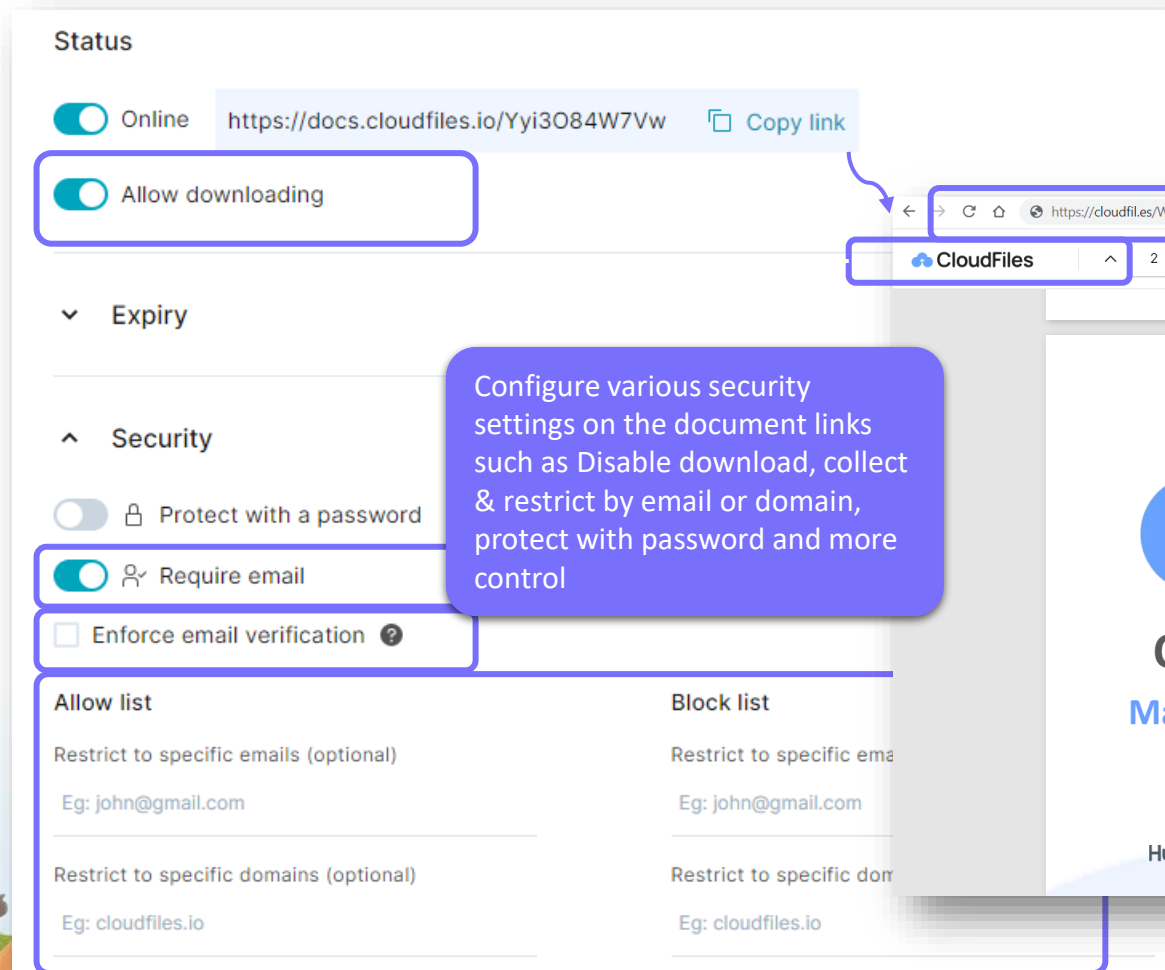
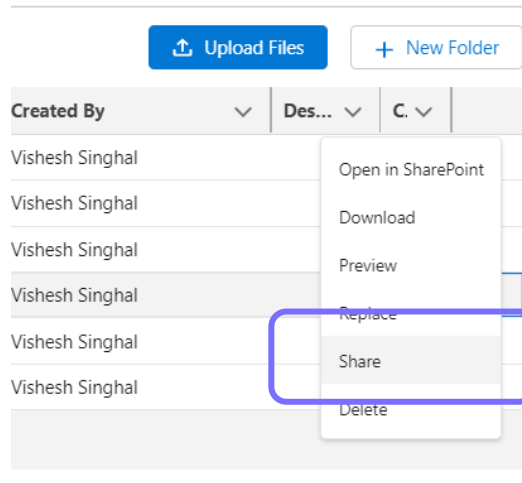
Platform event when SF Files uploaded. Flow actions to move them to external storage



available on
AppExchange

6.4 - Share externally without exposing Google Drive Access

Access file analytics from objects. Check opens, downloads and page-wise time spent.



View file / folder online as a link.
Use custom logo and domain for a
wholesome customer experience

Configure various security
settings on the document links
such as Disable download, collect
& restrict by email or domain,
protect with password and more
control



"The root of all suffering is attac

We think e-mail attachments are

Supercharge your files with enterpri
page-by-page-analytics and native-

Upload



Import files from a variety of
sources

Track



Get file view analytics and



available on
AppExchange

6.5 - Notify sales when proposals are viewed

Platform events when file views happen. Send internal notifications or update properties

1. Platform events trigger when file views happen on shared links

Name	Created By	Created On	Views	Status	Analytics
1626209958321	System User	06/09/2023	0	Live	
Battlecard_HubSp...	System User	06/09/2023	1	Live	

2. Update Object properties or send internal emails for focused follow-ups

Opportunity

Demo Opp SP 1704 1

Account Name

Demo SP 1704 1

Close Date

4/20/2023

Amount

Opportunity Owner

Siddharth Garg

✓

✓

Needs Analysis

Value Proposition

Id. Dec

Details

Chatter

Files

Demo Opp SP 1704 1

6.6 - Automate Salesforce data entry from file text



Flow actions that can use GPT & OCR tech to extract and classify text to update properties

1. Use file name / custom columns or OCR / GPT to check for a stage change event

Search in this folder...

Upload Files New Folder

Name	Created On	Created By	Asse...	Description	C.
1 HubSpot_CloudFiles_Battlecard_Multipager.pdf	04/17/2023	Siddharth Garg		Proposal	
2 hubspot_presales_intro_grpahuic.pptx	04/17/2023	Siddharth Garg			

Opportunity Demo Opp SP 1704 1

Account Name Demo SP 1704 1 Close Date 4/20/2023 Amount Opportunity Owner Siddharth Garg

Needs Analysis Value Proposition Id. Dec

Details Chatter Files

2. Flow components to detect change and auto-update fields such as Opportunity stage

6.7 - Customizable migration control between SF & Drive

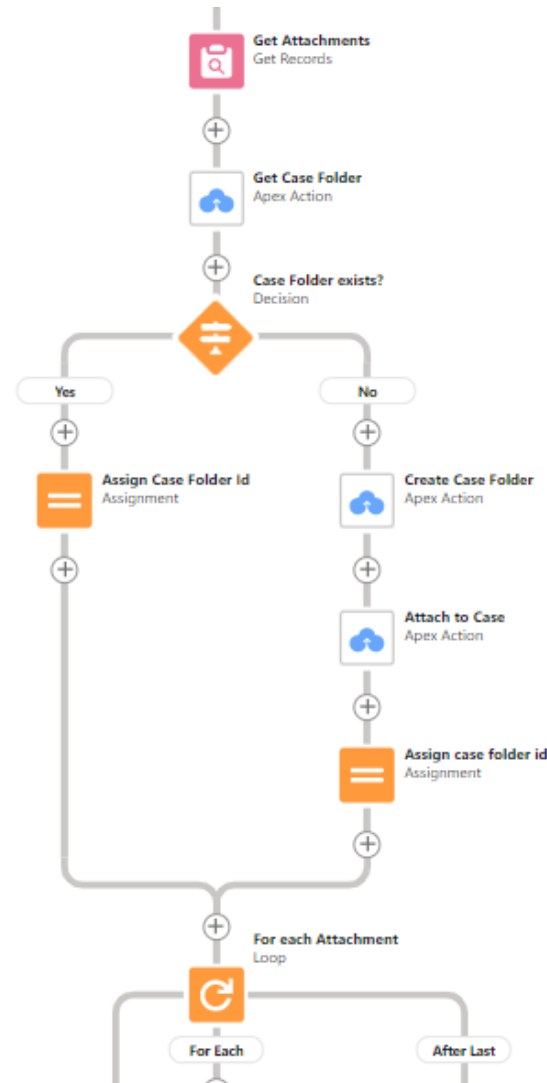


Simple & customizable flows can be used for migration and archiving

Scheduled or manual flows that can perform migrations for TBs of data

Bulk actions that take care of Salesforce & Google Drive API limits

Use flow components for selective migration

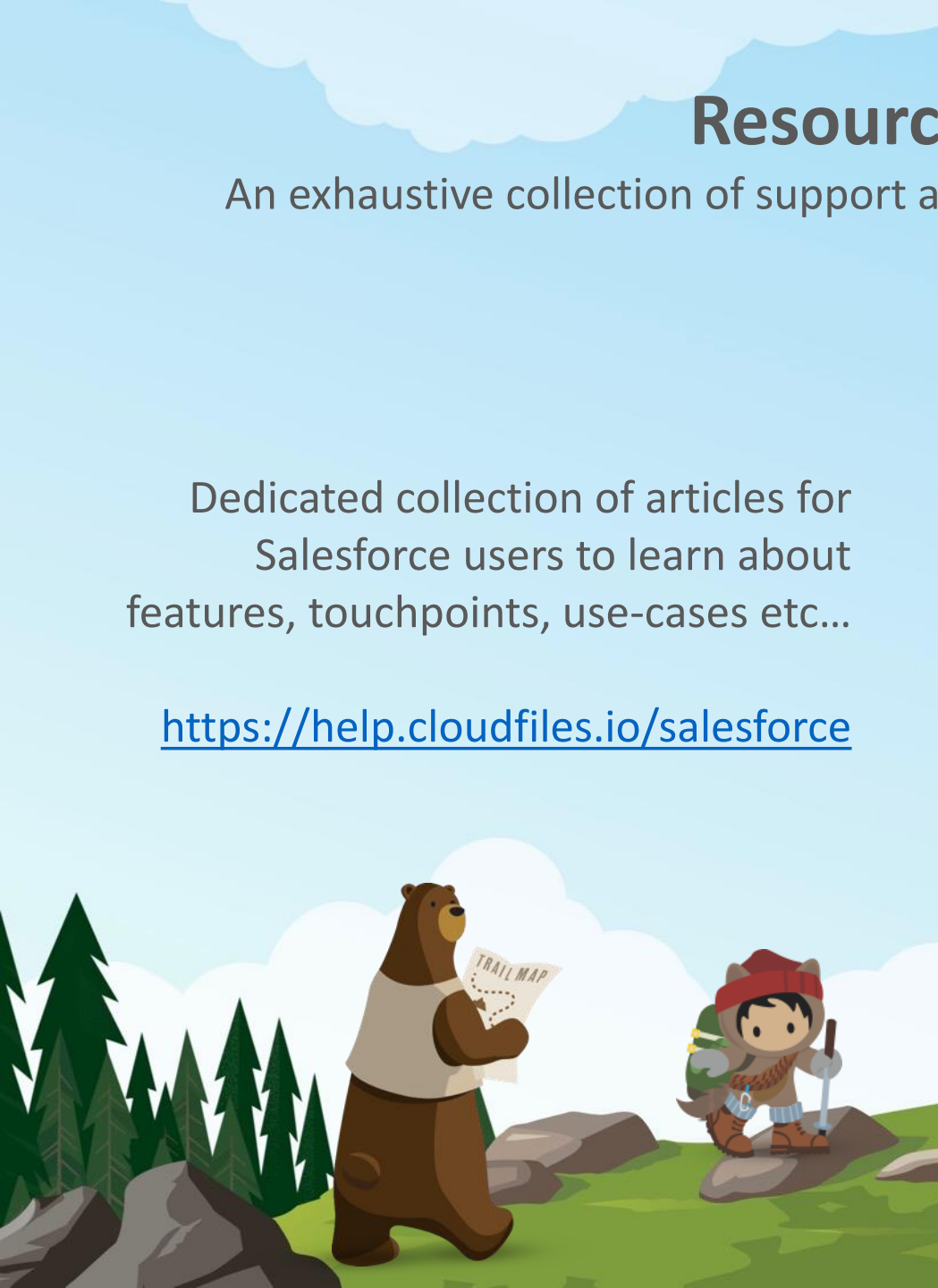


Resources – Knowledge Base

An exhaustive collection of support articles to work with the CloudFiles – Salesforce integration

Dedicated collection of articles for
Salesforce users to learn about
features, touchpoints, use-cases etc...

<https://help.cloudfiles.io/salesforce>



CloudFiles Docs

Home **Salesforce** HubSpot Web App API Reference

- Quick Starts
 - Installation guide
 - Connect external folder to a record
 - Access, share and track a file
 - Share files in experience cloud (co...
- ★ Features
- Widgets
- Flow Actions
- Flow Templates
- Platform Events
- Use Cases
 - Copy Salesforce files to SharePoint
- </> Apex
- FAQs

🕒 1min

Table Of Contents

In this section of the knowledge base, you can find a number of articles available in the CloudFiles Salesforce App. Much of this functionality covers standard Salesforce components such as Lightning Web Components, flow templates etc...

The Salesforce Knowledge Articles are organized in following categories to help you navigate quickly among the articles -

- [Quick Starts](#)
- [Features](#)
- [Widgets](#)
- [Flow Actions](#)
- [Flow Templates](#)
- [Custom Objects](#)

 **available on AppExchange**

Meet our architects for quick implementations

WE DO NOT CHARGE FOR SUPPORT



[Click here to book a demo
with our solution architect...](#)



Vishesh Singhal
Founder, Salesforce Lead



Siddharth Garg
Co-Founder, Head of growth



Ankit Gupta
Co-Founder, CTO



Naman Munot
Founding Member, Partnerships



Saumya Gupta
Founding Member, Partnerships



thank you

