

Salesforce OneDrive Integration

Connect OneDrive for Business folders to Accounts, Leads and Opportunities, and automate them with Flow

What is the CloudFiles Salesforce OneDrive integration?

CloudFiles is Document Automation for Salesforce. CloudFiles Document Management is the Salesforce OneDrive integration that puts OneDrive for Business folders on Salesforce records and automates the folders, file uploads and sharing around them. The same app connects Salesforce to SharePoint, AWS S3, Google Drive and Azure Blob, along with Box and Dropbox, so a team that keeps some documents in OneDrive and others in SharePoint works from one file browser in Salesforce.

Document Management ships in one Salesforce managed package with Document Generation and Document AI. Admins install it from AgentExchange, connect OneDrive, and place the file browser on the record pages that need it.

How do I connect OneDrive folders to Salesforce Accounts and Leads?

You connect OneDrive once, then link folders to records. OneDrive is connected for automation through a Microsoft integration user with OAuth, and each user who works in the file browser connects their own Microsoft account, so everyone sees only what their own OneDrive access allows.

Once connected, every record can have its own OneDrive folder. Users connect OneDrive folders to Salesforce Accounts and Leads by hand from the widget, or a Flow creates and links the folder automatically. The file browser works on any Lightning record page: Account, Lead, Contact, Opportunity, Case and every custom object.

What users get on the record:

- A tree view of the linked OneDrive folders, with search across the whole folder tree.
- Previews for PDF, Office files, images, video and audio.
- Upload, multi-file delete, download a file as PDF, and print from preview when the admin enables it.
- The same experience for SharePoint, Google Drive, AWS S3 and Azure Blob folders.

How do I sync Salesforce documents with OneDrive for Business?

To sync Salesforce documents with OneDrive for Business, CloudFiles works on the live OneDrive files through Microsoft's own API, the same way it works with SharePoint. There is one copy of each file, in OneDrive. Files uploaded from the Salesforce record appear in OneDrive, and files added to a linked

OneDrive folder appear on the record. Folder links survive record renames, so a folder stays attached when an Account or Lead changes its name.

Metadata goes from Salesforce to storage by Flow, so Salesforce stays the place where record data is edited and OneDrive stays the place where the files live.

How do I automate OneDrive folder creation from Opportunities?

Salesforce Flow is how admins automate OneDrive folder creation from Opportunities, Accounts and Leads. CloudFiles adds Flow actions, also callable from Apex:

Area	Flow actions
Folders	Create Folder (sync and async), Get Connected Folder
Files	Copy Salesforce Files, Create Salesforce File(s), Move Resource, Copy Resources, Delete Resource, Create File Request
Sharing	Create Link, Update Link Settings
Experience Cloud	Share with Community User, Remove from Community, Get Shared Resources

A typical pattern:

1. Create a record-triggered Flow on Opportunity that runs when a record is created.
2. Add Get Connected Folder to find the parent Account's OneDrive folder.
3. Add Create Folder inside it, named from the Opportunity Name, plus template subfolders such as Proposal and Contracts.
4. On Closed Won, add Copy Salesforce Files to file the signed documents into the Opportunity's OneDrive folder.
5. On Closed Lost, add Move Resource to move the folder into an archive location.

About a third of the actions are asynchronous. They return nothing to the Flow that calls them, and completion arrives later as a CloudFiles event, which a record-triggered or platform-event Flow handles. Put any step that depends on the result in that completion handler.

Can I move Salesforce email attachments to OneDrive automatically?

Yes. Record-triggered and scheduled Flows copy or move Salesforce Files and email attachments to OneDrive and leave a link on the record, so you can move Salesforce email attachments to OneDrive automatically as they arrive. The same Flows send files to SharePoint, AWS S3, Google Drive or Azure Blob when a team uses those instead. Legacy files already in Salesforce can be migrated in bulk with a scheduled Flow.

This is also how teams reduce Salesforce file storage costs: files move out of Salesforce storage into the OneDrive storage your company already pays for, and users still open them from the record.

How do I share OneDrive files securely outside the company?

Share links can carry an email wall, a password, an email verification code and a consent step. Links can expire and can carry a view limit. Every view is tracked with location and every download is tracked per file.

With Experience Cloud, you share OneDrive folders and files with community and portal users, configured per widget.

Is OneDrive with CloudFiles 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.

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.

OneDrive or SharePoint?

Many teams use both. OneDrive suits folders that belong to a person, such as an account owner's working files for their Leads and Accounts. SharePoint suits folders that belong to a team, such as a deal room or a project library with site-group permissions. CloudFiles connects both from the same package, so you can link a Lead to OneDrive today and move the Account's documents into a SharePoint library when the deal grows.

Pricing

Business plan: \$19 (USD) per user per month. Enterprise: on request.

Get started

Install CloudFiles Document Management from AgentExchange and start a free 14-day trial, or book a demo at cloudfiles.io.