



DocVAZ + GOOGLE DRIVE =



DocFynd <> Google Drive - Integration

How to integrate DocFynd with Google Drive?

This article explains the steps to integrate DocFynd with Google Drive.

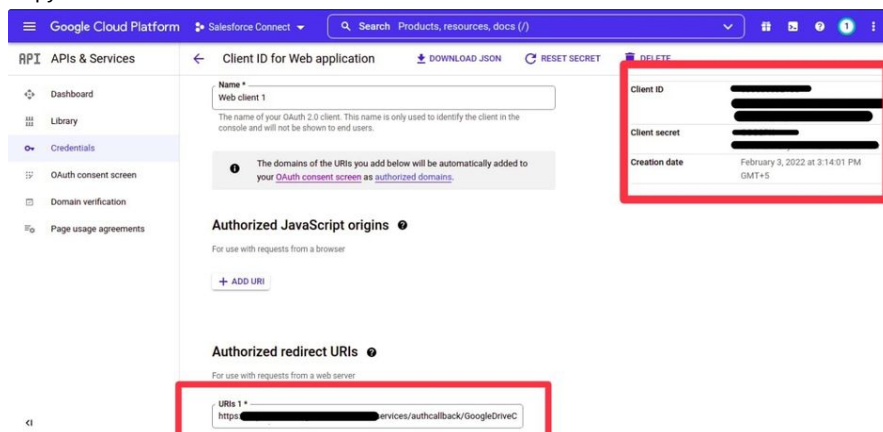
Google Drive is a file storage and synchronization service developed by Google. This allows users to store files in the cloud, synchronize files across devices, and share files.

Integration steps given below enable uploading and accessing documents on Google Drive from DocFynd.

 This article assumes that the reader is a Salesforce Admin and also have necessary permissions to access Google Drive

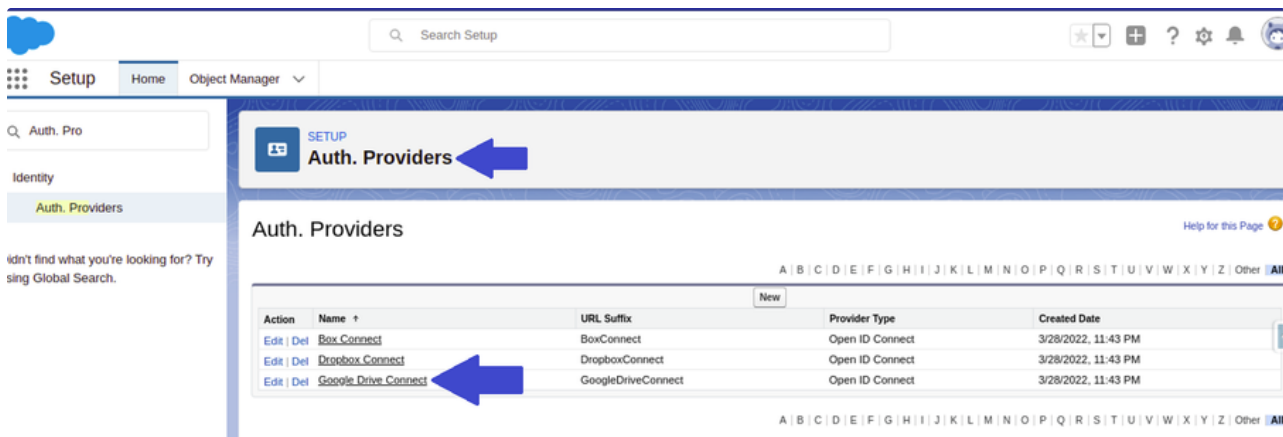
Create an app in Google Drive

1. Create an app in the Google Drive Developer Console. (for e.g. “DocFynd Connect”)
2. Copy and save the “Client ID” and “Client Secret”.

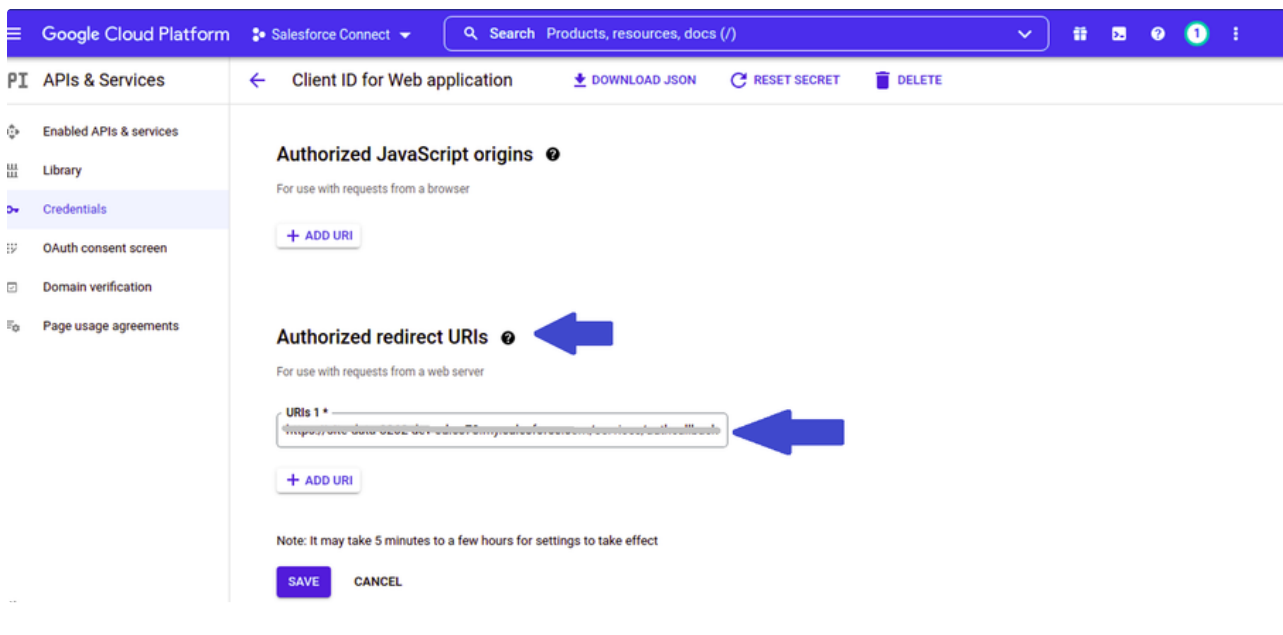


Connect Google Drive with Salesforce

1. Go to Setup and search “Auth. Provider”.
2. Click “Edit” against the item named “Google Drive Connect”.



3. Enter the “Consumer Key” with the value of “Client ID” as saved from the Google Drive app.
4. Enter the “Consumer Value” with the value of “Client Secret” as saved from the Google Drive app.
5. Click “Save” and close the details page.
6. Now, scroll down to “Salesforce Configuration” of “Google Drive Connect” item and copy the “Callback URL”.
7. Now, go to the Google Drive app created earlier. Under *Credentials* > *Authorized Redirect URI*, enter the copied value (from earlier step). Click “Save”.



Authenticate Named Credentials

In the next steps, we will authenticate “Google Drive Folders” and “Google Drive Upload”.

Google Drive Folders Authentication

1. In Salesforce setup, search “Named Credentials” and click “Edit” of the item named “Google Drive Folders”.

Setup Home Object Manager

Q Named

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

Named Credentials

A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid setting up named credentials.

View: All Create New View

A B C D E F G H I J K

Action	Label ↑	URL
Edit Del	Box Folders	https://api.box.com
Edit Del	Box Upload	https://upload.box.com
Edit Del	Dropbox File Metadata	https://api.dropboxapi.com/2/sharing/get_file_metadata
Edit Del	Dropbox Folders	https://api.dropboxapi.com/2/sharing/list_folders
Edit Del	Dropbox Upload	https://content.dropboxapi.com/2/files/upload
Edit Del	Google Drive Folders	https://www.googleapis.com/drive/v3/files
Edit Del	Google Drive Upload	https://www.googleapis.com/upload/drive/v3/files

New Named Credential

2. Ensure the field "Start Authentication Flow on Save" is ticked and click "Save".

Named Credentials

Identity Type: Per User

Authentication Protocol: OAuth 2.0

Authentication Provider: Google Drive Connect

Scope:

Administration Authentication Status: Pending

Start Authentication Flow on Save: ☒

Callout Options

Generate Authorization Header: ☒

Allow Merge Fields in HTTP Header: ☒

Allow Merge Fields in HTTP Body: ☒

Outbound Network Connection:

Save Cancel

3. This will re-direct to the authorization page of Google Drive.

4. Click "Grant access to Google Drive" to connect your Salesforce org with Google Drive.

5. After granting the access, you will be re-directed back to Salesforce (Named Credentials setting).

6. Now, the "Administration Authentication Status" should have changed from "Pending" to "Authenticated".

SETUP
Named Credentials

Label: Google Drive Folders
Name: GoogleDriveFolders
URL: https://www.googleapis.com/drive/v3/files

Authentication

Certificate
Identity Type: Per User
Authentication Protocol: OAuth 2.0
Authentication Provider: Google Drive Connect
Scope:
Administration Authentication Status: Authenticated

Edit Options

Generate Authorization Header: ☒
Allow Merge Fields in HTTP Header: ☐

✓ With this, authentication with Google Drive is successful for **Google Drive Folders**.

Google Drive Upload Authentication

1. In Salesforce setup, search “Named Credentials” and click “Edit” of the item named “Google Drive Upload”.

Setup | Home | Object Manager

Search: Named

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

SETUP
Named Credentials

A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid setting up named credentials.

View: **All** | Create New View

A | B | C | D | E | F | G | H | I | J | K

Action	Label ↑	URL
Edit Del	Box Folders	https://api.box.com
Edit Del	Box Upload	https://upload.box.com
Edit Del	Dropbox File Metadata	https://api.dropboxapi.com/2/sharing/get_file_metadata
Edit Del	Dropbox Folders	https://api.dropboxapi.com/2/sharing/list_folders
Edit Del	Dropbox Upload	https://content.dropboxapi.com/2/files/upload
Edit Del	Google Drive Folders	https://www.googleapis.com/drive/v3/files
Edit Del	Google Drive Upload	https://www.googleapis.com/upload/drive/v3/files

2. Ensure the field “Start Authentication Flow on Save” is ticked and click “Save”.

SETUP
Named Credentials

Identity Type: **Per User**

Authentication Protocol: **OAuth 2.0**

Authentication Provider: **Google Drive Upload**

Scope:

Administration Authentication Status: **Pending**

Start Authentication Flow on Save: ☒

Callout Options

- Generate Authorization Header: ☒
- Allow Merge Fields in HTTP Header: ☒
- Allow Merge Fields in HTTP Body: ☒
- Outbound Network Connection:

Save **Cancel**

3. This will re-direct to the authorization page of Google Drive.
4. Click “Grant access to Google Drive” to connect your Salesforce org with Google Drive.
5. After granting the access, you will be re-directed back to Salesforce (*Named Credentials* setting).
6. Now, the “Administration Authentication Status” should have changed from “Pending” to “Authenticated”.

SETUP
Named Credentials

Edit

Label: Google Drive Upload
Name: GoogleDriveUpload
URL: <https://www.googleapis.com/upload/drive/v3/files>

Authentication

Certificate:

Identity Type: **Per User**

Authentication Protocol: **OAuth 2.0**

Authentication Provider: **Google Drive Connect**

Scope:

Administration Authentication Status: **Authenticated**

Callout Options

- Generate Authorization Header: ☒
- Allow Merge Fields in HTTP: ☐

✓ With this, authentication with Google Drive is successful for **Google Drive Upload**.

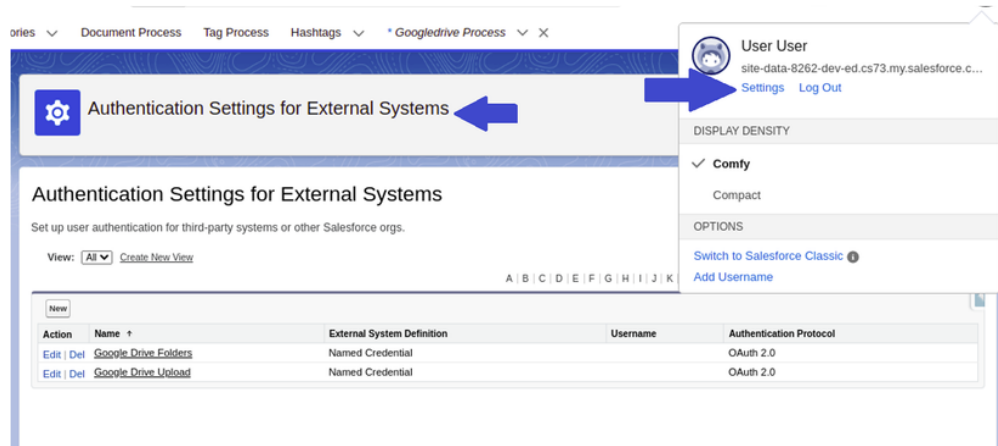
User Authentication settings

Next couple of steps is to authenticate the Salesforce user(s) to access the Google Drive. This needs to be done for the options named for “Google Drive Folders” and “Google Drive Upload”.

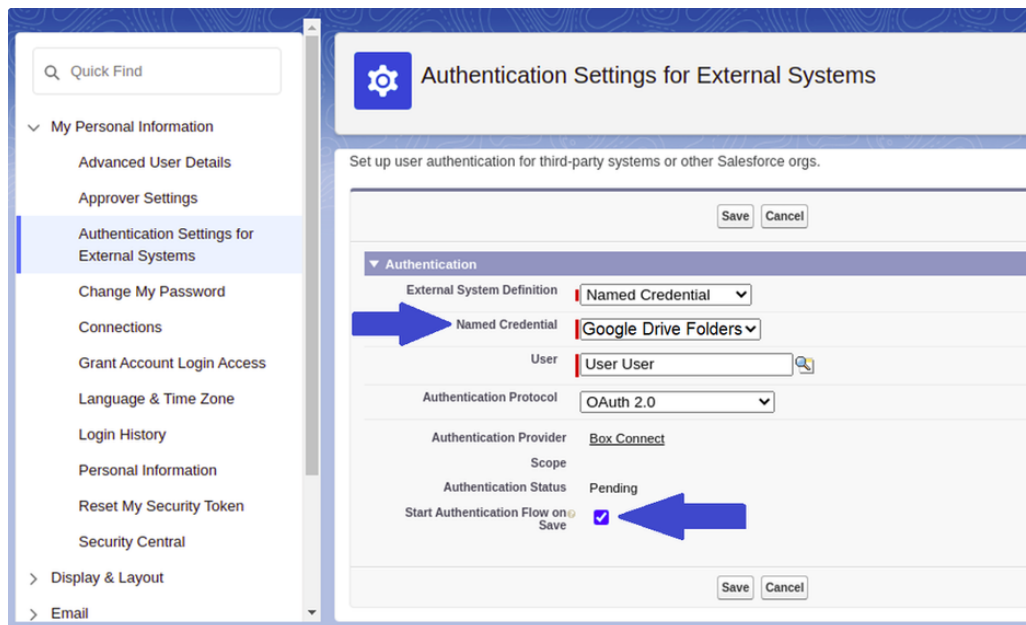
📌 These steps ensure Google Drive allows only authenticated access to its folders when files are uploaded/accessed from DocFynd.

Authentication settings for Google Drive Folders

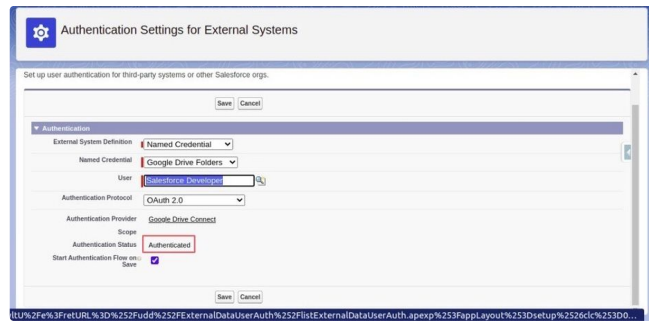
1. From User Settings in Salesforce, search “Authentication Settings for External Systems”. Click “New”.



2. Change the field value of “Named Credential” to “Google Drive Folders” from the drop-down.
3. In the “User” field, select all users who require the functionality of accessing Google Drive from DocFynd.
4. Tick the checkbox “Start Authentication Flow on Save”. Leave the rest of the values as same.



5. Click “Save”.
6. You will be re-directed to the authorization page of Google Drive.
7. Click “Grant access to Google Drive” to connect your Salesforce org with Google Drive.
8. After granting access, you will be re-directed to Salesforce > Authentication Settings for External Systems setting.
9. Now, the “Authentication Status” should be changed to “Authenticated”.



✔ User(s) successfully authenticated with Google Drive for **“Google Drive Folders”**.

Authentication settings for Google Drive Upload

1. Next step is to set up the user authentication for **“Google Drive Upload”**.
2. Under *“Authentication Settings for External Systems”* setting, select *“Google Drive Upload”* option.
3. Next, select the user(s) to authenticate for Google Drive Upload option. Ensure that you select all users who require the functionality of uploading and accessing documents from Google Drive.
4. Click *“Save”*. You will be re-directed to the authorization page of Google Drive.
5. Click *“Grant access to Google Drive”* to connect your Salesforce org with Google Drive.
6. After granting access, you will be re-directed to Salesforce > *Authentication Settings for External Systems* setting.
7. Now, the *“Authentication Status”* should be changed to *“Authenticated”*.

✔ User(s) successfully authenticated with Google Drive for **“Google Drive Upload”**.

✔ This completes the setup of Google Drive integration with DocFynd.