

Salesforce Google Drive Integration

Automate record-linked Google Drive folders and work on live Drive files from every Salesforce record.

What is the CloudFiles Salesforce Google Drive integration?

CloudFiles is Document Automation for Salesforce. CloudFiles Document Management is the Salesforce Google Drive integration that puts your Google Drive folders on every Salesforce record and automates folder creation, file uploads, permissions and secure sharing with Salesforce Flow. The same managed package connects SharePoint, AWS S3 and Azure Blob, so one install covers Google Drive and every other storage your company runs.

The Google Drive integration works on the live files through Google's own API. There is one copy of each file, and it sits in your Google Drive. Your files stay in your own storage. CloudFiles transfers them over encrypted connections and does not re-host them.

How does the Google Drive integration work on a Salesforce record?

- A file browser widget on the Lightning record page of any standard or custom object, plus a Content Library tab.
- A record-linked Google Drive folder for every record. Folder links survive record renames.
- Bi-directional for files and folders: a file added in Salesforce appears in Google Drive, and a file added in Google Drive appears on the Salesforce record once the folder is linked.
- A tree view of attached folders, search across the whole folder tree, multi-file delete, and download as PDF.
- Previews for PDF, Office files, images, video and audio, with print from preview when an admin enables it.
- Per-library conflict behavior: when a file or folder already exists, admins choose Rename, Replace, No Op or Fail.

Sales, service and operations users stop working in two windows. They open the record and the Google Drive folder is already there.

How do I automate folder creation in Google Drive for new accounts?

Use a record-triggered Flow on Account create with the Create Folder action (sync or async). CloudFiles creates the Account's Google Drive folder, in My Drive or a Shared Drive, and links it to the record. Get

Connected Folder returns the linked folder later, so every other Flow finds the right place without storing URLs that break when folders move. To automate folder creation in Google Drive for new accounts that already exist in your org, run the same logic as a scheduled Flow.

How do I automate Google Drive folder creation for new opportunities?

Add a second record-triggered Flow on Opportunity create. Automate Google Drive folder creation for new opportunities inside the parent Account's folder, so the Drive layout mirrors your Salesforce data. Stage changes such as Closed Won or Closed Lost, owner or team changes, and scheduled Flows are common triggers for follow-on steps: Move Resource files into a closed-deals folder, or run Update Permissions when the opportunity team changes.

How do I automate record-linked folder structures in Google Drive?

Record-linked folder structures in Google Drive are built from Create Folder calls in a Flow: one for the record, then one for each subfolder your team expects. CloudFiles respects existing storage folder layouts, so a team with an established Drive structure keeps it. A pattern we see in legal: Flows create folder structures on Opportunity and on a custom Matter object, across both My Drive and Shared Drives, and Salesforce files are moved to Google Drive automatically.

Flow actions most used with Google Drive:

- **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.
- **Metadata:** Set Resource Property, Get Resource Property, Search by Resource Metadata.
- **Permissions and sharing:** Update Permissions, Create Link, Update Link Settings.

About a third of actions are asynchronous. They return nothing, and completion arrives later as a CloudFiles event that a record-triggered or platform-event Flow handles.

Can I move Salesforce files to Google Drive automatically?

Yes. Record-triggered and scheduled Flows copy or move Salesforce Files and email attachments to Google Drive and leave a link on the record. Legacy files can be migrated in bulk. When moving files out of Salesforce, delete the Salesforce original only in the completion handler. This offloads Salesforce file storage to Google Drive and reduces Salesforce file storage costs, so the org can stop buying extra Salesforce storage for documents that already live in Google Workspace.

How do I integrate SharePoint or Google Drive with Salesforce Files?

Many companies run Google Drive in one team and SharePoint in another. To integrate SharePoint or Google Drive with Salesforce Files, install one package and connect both. Both work on live files through the provider's own API with one copy in your storage, both get record-linked folders and the same Flow

actions, and Files Connect references are supported for SharePoint. AWS S3 and Azure Blob connect the same way when large files or back-end systems need them.

How do I connect Google Drive to Salesforce?

Google Drive connects through a Google integration user over OAuth, with access to My Drive and Shared Drives. Your Google Workspace admin can revoke that access at any time from the Google Workspace admin console.

- **Least privilege on the Salesforce side:** assign a least-privilege Salesforce permission set.
- **Two identities:** Flow automation runs as the integration user, while the widget and Content Library run as each user through their own storage connection.
- **Fewer API calls:** the "file attached" event setting ships off. Leave file-attached events off unless a Flow needs them.

Metadata and permissions go from Salesforce to Google Drive by Flow. A column edited in the CloudFiles widget raises an event that a Flow can write back to the record.

How are Google Drive permissions and external sharing handled?

Update Permissions grants or revokes read or write access by email, Salesforce user or Salesforce group, so Drive access follows record owners and teams. Share links 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. Share links support white-label and custom domains.

For Experience Cloud, share folders and files with community and portal users per widget. External users can upload into Google Drive without having a Google account, and Share with Community User, Remove from Community and Get Shared Resources control what each portal user sees.

What are the best tools for Google Drive and Salesforce integration?

The best tools for Google Drive and Salesforce integration keep one copy of each file, put Drive on the record, and automate folders with Flow. CloudFiles Document Management covers each of these.

What a Google Drive buyer needs	How CloudFiles Document Management delivers it
Drive files on the Salesforce record	File browser widget on any object, plus a Content Library tab
One copy of every file	Works on live Google Drive files through Google's API
Automated folders for Accounts and Opportunities	Create Folder in record-triggered and scheduled Flows
My Drive and Shared Drives	Both supported through the Google integration user
External uploads	Experience Cloud users upload into Google Drive with no Google account
Other storages	SharePoint, AWS S3 and Azure Blob in the same package

Teams also move to CloudFiles when replacing Files Connect, Document Extractor or a sync tool that breaks on folder renames. The Business plan is \$19 per user per month, Enterprise pricing is on request, and 24x7 support is included.

Is the Salesforce Google Drive integration secure?

A pattern we see in healthcare: HIPAA-compliant document and folder automation between Salesforce and Google Drive.

- 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.

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.