

Salesforce Azure Blob Storage Integration

Store Salesforce files and attachments in Azure Blob Storage, handle large uploads, and keep every file on the record.

What is the CloudFiles Salesforce Azure Blob Storage integration?

CloudFiles is Document Automation for Salesforce. CloudFiles Document Management is the Salesforce Azure Blob Storage integration that connects your org to your own Azure Blob containers, with SharePoint, AWS S3 and Google Drive available in the same managed package. Users browse, preview, upload and search Azure Blob files from the Salesforce record. Admins automate folders, file moves, blob metadata and sharing with Salesforce Flow.

Your files stay in your own storage. CloudFiles transfers them over encrypted connections and does not re-host them. For a company that already runs on Microsoft Azure, Azure storage for Salesforce files keeps documents inside the cloud account your IT team already governs.

What does Azure Blob storage look like 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 Azure Blob folder for every record. Folder links survive record renames.
- 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 in the container, admins choose Rename, Replace, No Op or Fail.

Users do not need Azure portal access or Storage Blob roles of their own for the widget experience.

How do I store Salesforce files and attachments in Azure Blob?

Record-triggered and scheduled Flows copy or move Salesforce Files and email attachments to Azure Blob and leave a link on the record. Legacy files can be migrated in bulk. To store Salesforce files and attachments in Azure Blob:

1. Connect the Azure Blob container and turn on the libraries users should see.

2. Build a record-triggered Flow that runs Create Folder, then Copy Salesforce Files or Move Resource into the record's folder.
3. Handle the CloudFiles completion event in a second Flow and delete the Salesforce original only there.
4. Run a scheduled Flow or a bulk migration for files already in Salesforce.

Moves are asynchronous. The action returns nothing, and completion arrives later as a CloudFiles event that a record-triggered or platform-event Flow handles.

Why use Azure storage for Salesforce files?

Salesforce storage fills up, and buying more of it for documents is the wrong answer when the company already pays for Azure. Moving files to Azure Blob offloads Salesforce file storage and reduces Salesforce file storage costs, while users keep every document on the record. IT governs network access and roles in one place, and the same CloudFiles package can also serve SharePoint, AWS S3 and Google Drive for teams that use them.

A pattern we see at housing agencies: Flows create Azure Blob folders when an application's status changes, signed files are moved to Azure once they are complete, and record values are written onto blob metadata with Set Resource Property so they can be found later with Search by Resource Metadata.

How do large file uploads to Azure from Salesforce work?

Salesforce's own file size limits rule it out for large files. With CloudFiles, large file uploads to Azure from Salesforce go into the record's Azure Blob folder instead of Salesforce storage. Experience Cloud users can upload into Azure Blob from a portal without having an Azure account.

A pattern we see in support teams: customers upload large log files from a portal into the Case folder in Azure Blob, and support engineers preview or download them from the Case in Salesforce.

Do files added to the Azure Blob container appear in Salesforce?

Yes. Azure Blob supports event-driven sync, turned on per connection. The customer creates an Event Grid subscription with subject filtering on the storage account, and a file that arrives in the container by any route is indexed and appears on the matching record. Back-end jobs, integrations and Azure tools can all write into the container, and Salesforce users see the result on the record.

Sync covers files and folders. Metadata goes from Salesforce to Azure Blob by Flow.

How do I connect Azure Blob Storage to Salesforce?

- **Identity:** add the CloudFiles Entra gallery app to your tenant and assign Storage Blob roles to the CloudFiles service principal.
- **Network:** restrict access to the storage account with an IP allowlist.

- **Folders:** a folder created by CloudFiles appears in the container once a file is uploaded into it.
- **Least privilege on the Salesforce side:** assign a least-privilege Salesforce permission set.
- **Two identities:** Flow automation runs as the integration identity, 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.

Which AppExchange tool is right for Salesforce and Azure Blob Storage?

What an Azure Blob buyer needs	How CloudFiles Document Management delivers it
Azure Blob files on the Salesforce record	File browser widget on any object, plus a Content Library tab
Folder per record	Record-linked Azure Blob folders that survive record renames
Store Salesforce files and attachments in Azure Blob	Flow actions to copy or move files, plus bulk migration
Large file uploads to Azure from Salesforce	Record and portal uploads into Azure Blob, no Azure account for external users
Files from other systems on the record	Event-driven sync from the container, turned on per connection
Other storages	SharePoint, AWS S3 and Google Drive 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.

Can I share Azure Blob files securely outside Salesforce?

Yes. Create Link and Update Link Settings build share links from Flow or the widget. Links carry an email wall, a password, an email verification code and a consent step, and they can expire or 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 portals, Share with Community User, Remove from Community and Get Shared Resources control what each Experience Cloud user sees in Azure Blob.

Is the Salesforce Azure Blob Storage integration 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.

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.

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