

File Collab App

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Problem Statement

Expanding Salesforce file storage comes with significant costs, and the client faced the challenge of finding a dynamic, cost-effective solution to manage files while meeting their evolving business needs. The goal was to optimize storage use without incurring excessive expenses.

Solution

Efficient Storage Utilization: Develop an integrated solution to alleviate the need for increased Salesforce storage by seamlessly integrating Google Drive—an alternative storage platform with a more cost-effective model. This integration ensures that the client can manage and store files effectively without incurring additional Salesforce storage costs.

Benefits to Business

1. **Cost Reduction:** By leveraging Google Drive as a storage solution, the client can avoid the escalating costs of expanding Salesforce file storage. Google Drive provides ample storage at a fraction of the cost, enabling long-term savings while meeting storage needs.
2. **Real-time Monitoring:** The system offers real-time monitoring of both Salesforce and Google Drive storage usage, ensuring that resources are effectively managed and potential overages are tracked proactively.
3. **Dynamic File Syncing:** Sync files of up to 100MB dynamically between Salesforce and Google Drive. The syncing process ensures that files are transferred based on their corresponding Salesforce objects, making it easy to manage large files without sacrificing performance.
4. **Object-based Synchronization:** Maintain seamless synchronization between Salesforce records and the files linked to them. This synchronization preserves the object hierarchy, ensuring that files remain organized and easily accessible based on their related Salesforce objects.
5. **Automatic File Deletion:** To maintain data consistency and optimize storage, the system automatically deletes files from Google Drive when they are removed from Salesforce. This ensures that files are only stored as long as they are necessary, preventing storage bloat.
6. **Automated Folder Creation:** To further simplify file management, folders are automatically created on Google Drive based on Salesforce object names. This enhances organization and reduces the time spent on manual folder management.
7. **Comprehensive View of Files:** The solution offers a List View that provides an overview of both synced and unsynced files, including key details such as file names, sizes, and creation dates. This gives users a clear and concise view of file statuses, making it easier to track and manage content.
8. **Effortless File Retrieval:** Users can quickly retrieve files, whether synced or unsynced, by simply searching for the file names in the List View. This simplifies the file retrieval process, reducing the time and effort required to locate important documents.

Features and Key Specifications

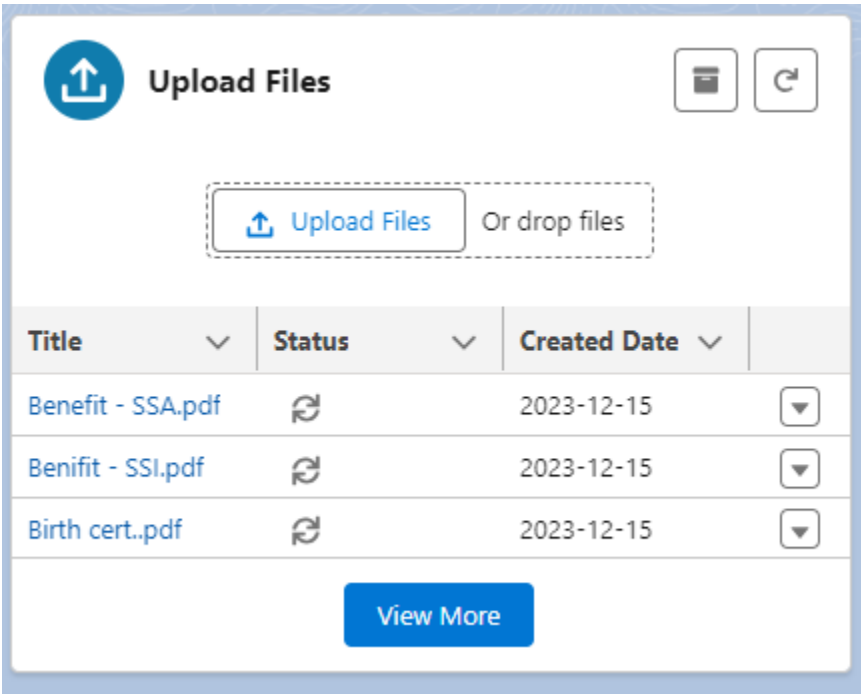
- **Google Drive Integration:** Seamlessly integrates Google Drive with Salesforce, providing an alternative, cost-effective storage solution to reduce the need for expanding Salesforce file storage.
- **Real-time Storage Monitoring:** Monitors both Salesforce and Google Drive storage usage in real time, helping users stay within their storage limits and ensuring effective management of resources.
- **Dynamic File Syncing (up to 100MB):** Enables dynamic syncing of files, up to 100MB in size, between Salesforce and Google Drive, based on the associated Salesforce object.
- **Object-based File Synchronization:** Syncs files while maintaining their corresponding Salesforce object hierarchy, ensuring that files are properly organized and associated with the right objects.
- **Automatic File Deletion:** Automatically deletes files from Google Drive when they are removed from Salesforce, ensuring that storage space is efficiently used and that files are only retained when needed.
- **Automated Folder Creation:** Automatically generates folders in Google Drive based on the names of Salesforce objects, streamlining file organization and eliminating the need for manual folder creation.
- **Comprehensive List View:** Offers a detailed List View where users can examine synced and unsynced files, along with important details such as file sizes, names, and creation dates.
- **File Retrieval:** Allows users to easily retrieve both synced and unsynced files by searching for file names within the List View, facilitating quick and efficient file access.
- **Seamless User Interface:** Provides an intuitive and user-friendly interface for managing the integration between Salesforce and Google Drive, making it easy for users to navigate and utilize the system.
- **Customizable Sync Rules:** Offers flexible options to customize sync rules based on user preferences, including the ability to choose specific Salesforce objects for syncing and set file size limits.
- **Audit Trails & Activity Logs:** Tracks and records all file-related activities, including sync actions, deletions, and folder creations, providing a comprehensive audit trail for transparency and compliance.
- **Data Consistency:** Ensures that files in Salesforce and Google Drive are consistently synchronized and up-to-date, helping to maintain data integrity and reliability across platforms.

Screenshots

File Upload Component

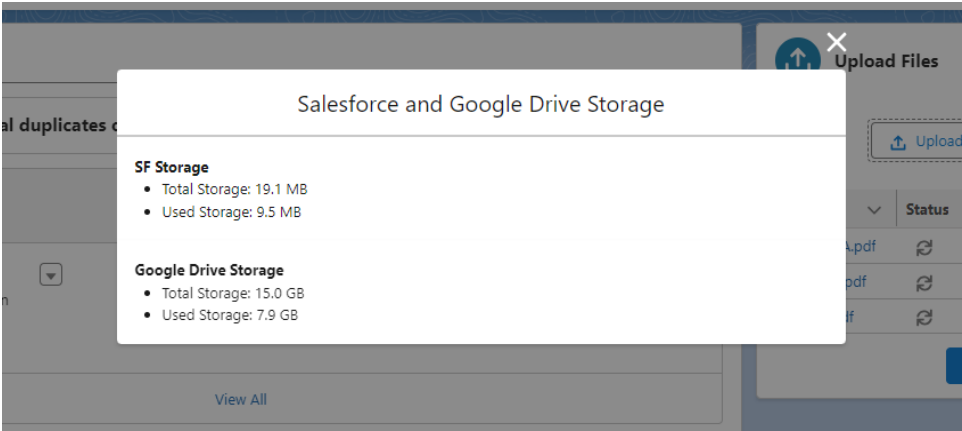
When files are uploaded using the "Upload Files" button, they are seamlessly synchronized directly to Google Drive, bypassing Salesforce storage. This integration ensures efficient storage management by

utilizing Google Drive's capabilities while keeping Salesforce storage resources optimized.



Storage Visibility

The storage usage for both Google Drive and Salesforce can be monitored in real-time, providing clear and up-to-date insights into available capacity. This ensures effective storage management by allowing users to track and optimize their usage across both platforms seamlessly.



File Synchronization Status and Detailed View

Users can easily track the status of files, identifying whether they are synced or Un synced, for better visibility and control over file synchronization processes.

Additionally, by clicking the "View More" button, users can access a detailed list of all files, including their respective file sizes. This feature provides a comprehensive overview, enabling effective file management and ensuring that no file is overlooked in the synchronization process.

University of Ariz... Loading...

Account > University of Arizona

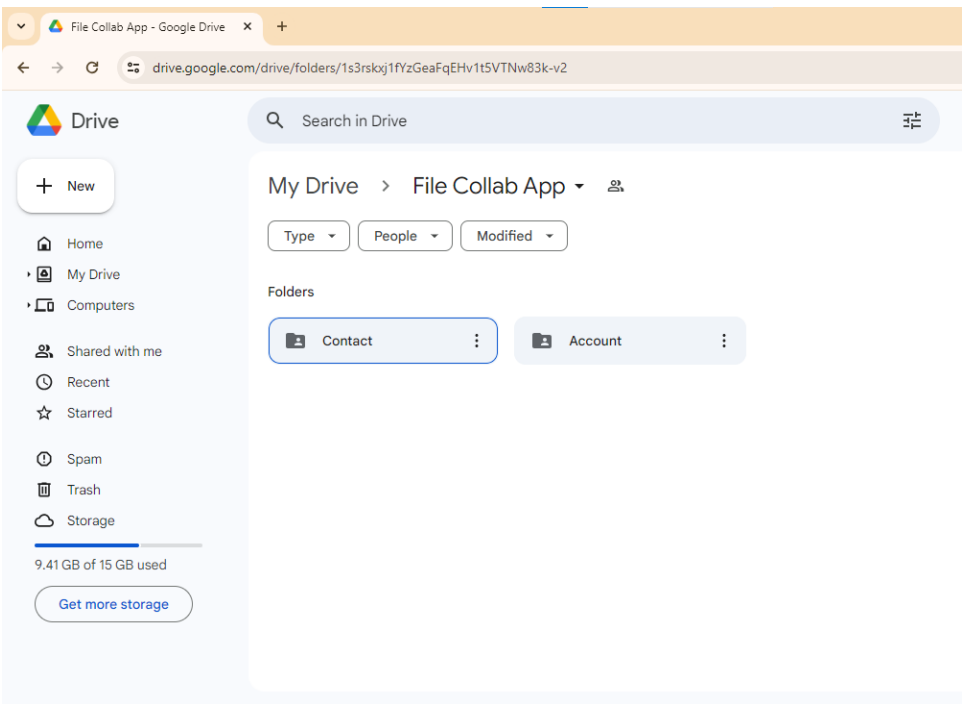
Uploaded Files

4 items • Sorted by Title • Updated a few seconds ago

	Title	Status	Created Date	File Size	
1	Benefit - SSA.pdf	Synced	15/12/2023, 01:09 pm	13.2 KB	
2	Benefit - SSI.pdf	Synced	15/12/2023, 01:09 pm	13.0 KB	
3	Birth cert.pdf	Synced	15/12/2023, 01:09 pm	13.3 KB	
4	Benefit - other.pdf	Synced	15/12/2023, 01:07 pm	13.0 KB	

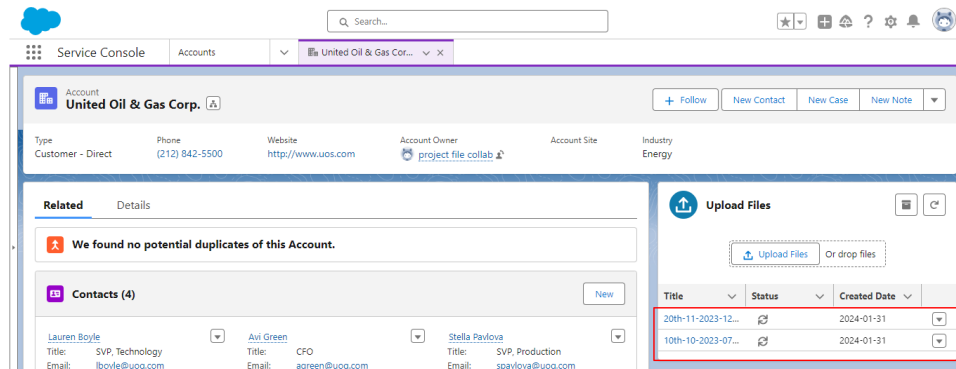
Organized Folder Structure in Google Drive

Within the main folder on Google Drive, subfolders are automatically created based on the specific component where files are uploaded. This structured organization ensures that files are logically categorized and easy to locate, enhancing accessibility and streamlining file management.



Record-Based Folder Identification in Google Drive

In Google Drive, folders are named based on the associated record name, allowing users to easily identify and locate folders related to specific records. This naming convention promotes efficient organization and simplifies file retrieval, ensuring a seamless user experience.



Centralized File Management in Record-Specific Folders

All uploaded files are stored within their respective record-specific folders on Google Drive. This centralized approach ensures that files related to a particular record are grouped together, making it easier to manage, access, and retrieve them whenever needed.

[Get more storage](#)

Modified ▾

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