

Google Drive Document Management for Legal and Healthcare Teams on Salesforce

Matter folders, patient document folders and automatic file moves between Salesforce and Google Drive

What problem does this solve for legal and healthcare teams?

CloudFiles is Document Automation for Salesforce. This guide describes two patterns we see with Google Drive and Salesforce.

In legal, a firm tracks new business on Opportunity and runs each engagement on a custom **Matter** object. Every matter needs the same folder structure in Google Drive, the right people need access to it, and documents attached in Salesforce should end up in Drive.

In healthcare, a provider or care organization tracks patients, referrals and cases in Salesforce and keeps documents in Google Workspace. Folders and file handling have to be automated and handled under HIPAA.

The shared problems:

- Folders are created by hand, so structures drift and some matters or patients have none.
- Staff work in two windows and paste Drive URLs onto records, and those stored URLs break when folders move.
- Files attached in Salesforce fill Salesforce storage and sit apart from the Drive folders the team uses.
- Access to Drive folders does not follow who owns the record in Salesforce.

CloudFiles Document Management is the Google Drive integration for Salesforce that fixes all four. It builds Google Drive folders for matters and patients from Flow, puts them on the record, and lets you move Salesforce files to Google Drive automatically. The same app connects Salesforce to SharePoint, AWS S3, Google Drive and Azure Blob, so a firm that archives closed matters in AWS S3 or Azure Blob, or shares a library with a SharePoint team, uses one widget.

Which Salesforce objects are involved?

- **Legal:** Account for the client, Opportunity for the engagement being won, and a custom **Matter** object for the work.
- **Healthcare:** Account and Contact for patients, **Case** for requests, and custom objects such as Referral or Care Episode.

CloudFiles works on any standard or custom object. The file browser widget sits on each object's Lightning record page, and a Content Library tab shows every connected Drive.

Where are the files stored?

In your own Google Drive, in My Drive and Shared Drives. CloudFiles connects through a Google integration user (OAuth) and works on the live files through Google's own API, so there is one copy, in Drive. Files added in Salesforce appear in Drive, and files added in Drive appear on the Salesforce record once the folder is linked. Folder links survive record renames. A Google Workspace administrator can revoke CloudFiles' access at any time.

How do we build Google Drive folders for matters, step by step?

1. **Opportunity folder.** A record-triggered Flow on Opportunity create runs **Create Folder** in the practice group's Shared Drive.
2. **Matter folder structure.** When the Opportunity is won and the Matter record is created, a Flow on Matter create runs **Create Folder** for the matter and its standard subfolders, such as Correspondence, Pleadings and Billing. About a third of actions are asynchronous; a platform-event Flow handles the completion event before the next step uses the folder.
3. **Carry pre-engagement files over. Copy Resources** copies the Opportunity folder's contents into the matter folder.
4. **Grant access. Update Permissions** grants write access on the matter folder to the responsible attorney and the matter team, by email or by Salesforce user or group. When the team changes, the same action revokes access for people leaving.
5. **Tag the matter. Set Resource Property** stamps matter number and practice area on the folder.
6. **Move Salesforce files to Google Drive.** A record-triggered or scheduled Flow runs **Copy Salesforce Files** into the matter folder and leaves a link on the record. Remove the Salesforce file only in the completion handler, after the copy in Drive exists.

Trigger	Flow action	Result
Opportunity created	Create Folder	Folder in a Shared Drive
Matter created	Create Folder, Copy Resources	Matter structure with early files
Matter team changes	Update Permissions	Drive access follows Salesforce
File added in Salesforce	Copy Salesforce Files	File in Drive, Salesforce storage freed

How do we set up HIPAA document storage in Google Drive with Salesforce?

For healthcare, the same Flows run on patient and case records:

1. **Patient folders.** A Flow on patient Account or Contact create runs **Create Folder** in a restricted Shared Drive.
2. **Per-episode subfolders.** A Flow on Referral or Care Episode create adds a subfolder under the patient's folder.
3. **Access by care team. Update Permissions** grants and revokes access as care team assignments change in Salesforce.
4. **Files out of Salesforce. Copy Salesforce Files** moves intake forms and referral letters into the patient folder, so protected documents sit in your Google Drive.
5. **Controlled sharing.** When a document must go to an outside provider, **Create Link** issues a share link with an email wall, password, email verification code and consent step. Links can expire and carry a view limit, and every view and download is tracked.

CloudFiles is compliant with HIPAA (BAA available), so HIPAA-compliant document and folder automation runs through the same app the legal team uses.

How do permissions and sharing work?

Metadata and permissions go from Salesforce to Google Drive by Flow. Flow automation runs as the Google integration user; the widget and Content Library run as each user through their own storage connection. Users need no Drive rights for the widget experience when an admin designs it that way. Clients and patients on an Experience Cloud portal see only folders shared with them through **Share with Community User**, and they can upload into Google Drive without a Google account.

What are the security and compliance facts?

- 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 (ISO certificates, SOC 2 Type II report, 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.

