

Drive Your Files User's Manual



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Google Drive



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Introduction

Welcome to the user manual for **“Drive Your Files” (DYF)**, our powerful Salesforce to Google Drive integration. This guide is designed for Salesforce users who need a simple and efficient way to manage file storage.

DYF offers two main methods to optimize your file management:

1. **Manual Upload (One-Click Upload):** With just one click, our solution lets you upload files, such as images and documents, from Salesforce to Google Drive. This helps you stay organized and frees up valuable storage space in your Salesforce org.
2. **Automatic Upload (Zero-Setup Feature):** Our new automatic functionality allows files to be seamlessly synchronized and uploaded to Google Drive without requiring any end-user action, once the IT team has completed the initial setup.

Whether you're using the manual function for a single upload or benefiting from the efficiency of the automatic upload, in this document you'll find step-by-step instructions to help you get started quickly, along with tips for making the most of the integration. This user manual will walk you through everything you need to know.

Getting Started

Before you can upload files to Google Drive from Salesforce, a few setup steps need to be completed behind the scenes. These one-time configurations are handled by your organization's IT team and Salesforce System Administrator.

If you're a Salesforce user, you won't need to perform any setup yourself. Once the integration is ready, you'll see the Google Drive Upload button on supported objects.

Here's what happens during setup:

- Google Cloud Configuration: Your IT team sets up the connection between your organization's Google account and Salesforce.
- Salesforce Package Installation: Your Salesforce System Administrator installs the Drive Your Files package from the Salesforce AppExchange.
- Permissions: Salesforce System Administrator will configure permissions and make sure the necessary buttons appear where needed (e.g., on Opportunity or Account pages).

Once the setup is complete, you'll be ready to start uploading files directly to Google Drive with just one click.

No extra training or setup is required from your side. The next section walks you through how to use the feature in your day-to-day workflow.

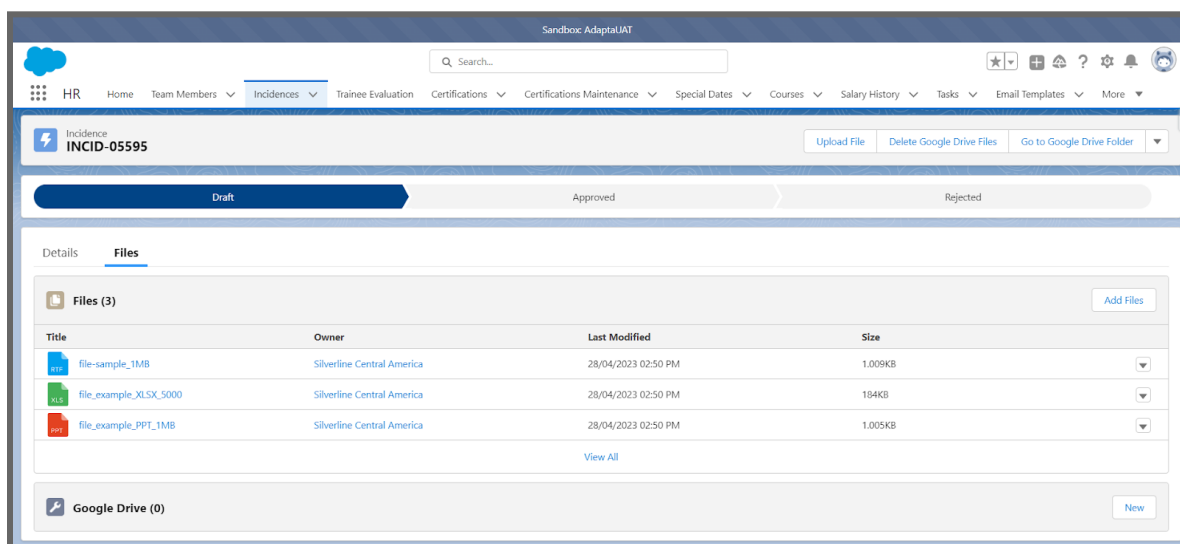
Upload a File (Manual Process)

Once the initial configuration of Drive Your Files (DYF) is set up, manually uploading files to Google Drive from Salesforce is quick and easy.

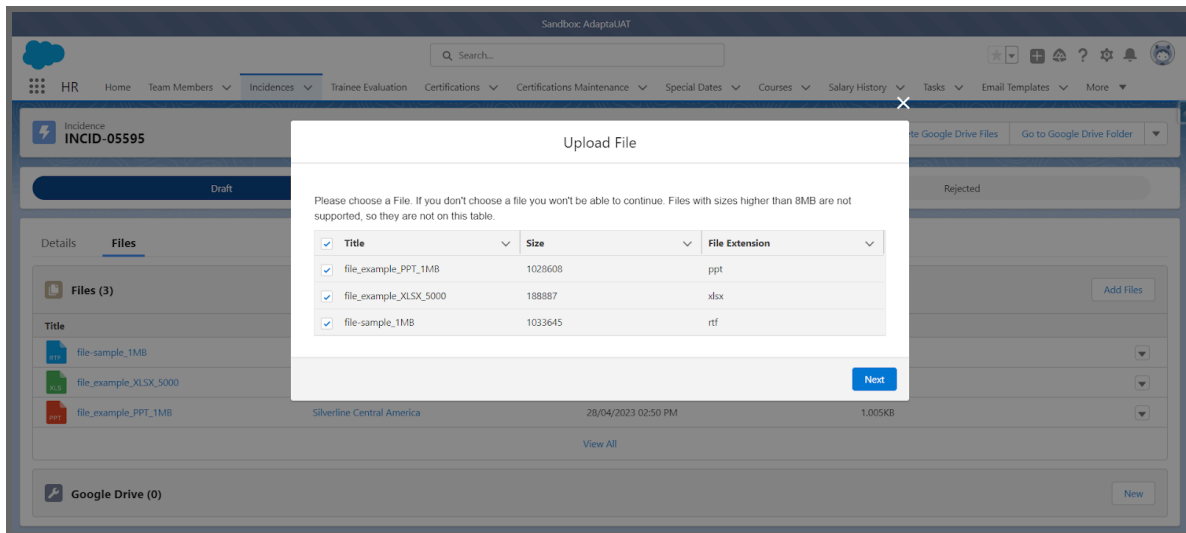
Note on File Management: While the *Automatic Upload feature* (See Section 6) handles standard file synchronization for you, this manual process allows you to upload specific files instantly from Salesforce records to a linked Google Drive folder with a couple of clicks. This will help to keep your Salesforce storage clean while keeping important files accessible.

Follow the steps below to manually upload files from Salesforce to Google Drive:

1. Log in to your Salesforce Org using your valid user credentials.
2. Navigate to an object that contains the “Drive Your Files” configuration (e.g., Opportunities, Accounts, or a custom object).
3. Open the desired record.
4. Check the “Files” related list on the record page.
 - a. If the record has no files, upload one from your computer using the “Upload Files” or “Add Files” button.
 - b. In some organizations, files may be automatically generated by other processes. Make sure at least one file is attached to the record before proceeding.

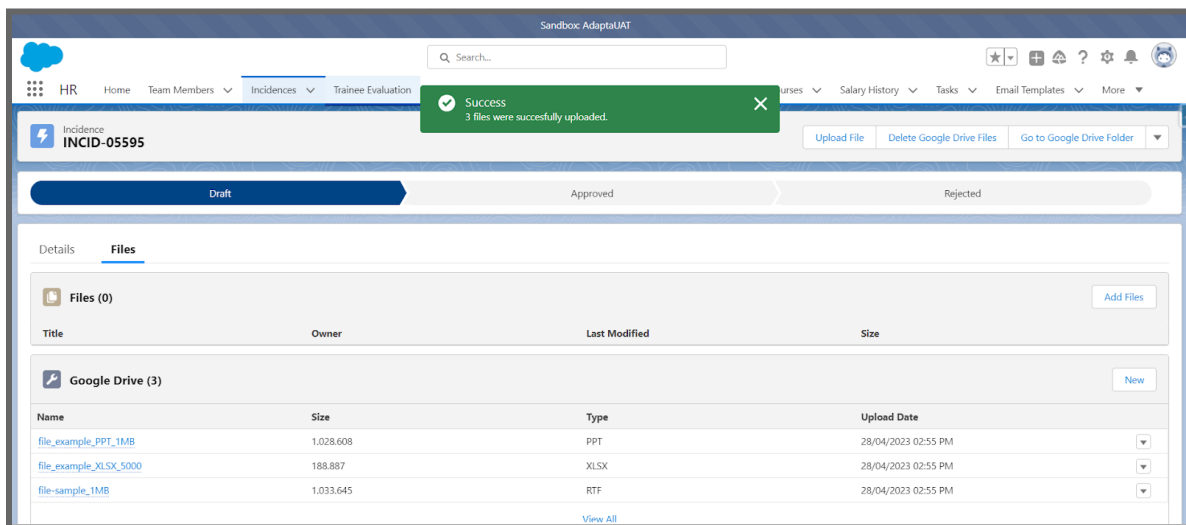


5. Click the “Upload Files to Google Drive” button located at the top right of the screen.
6. Select the files you want to upload by clicking the box next to each file.



Note: Files larger than 12MB will be excluded from the list as they are not supported.

7. Click the “Next” button to begin the upload process.
8. Once the upload is complete, a confirmation message will appear, letting you know that the files were successfully uploaded. The selected files are now stored in Google Drive.



Important Note on File Size Limitation

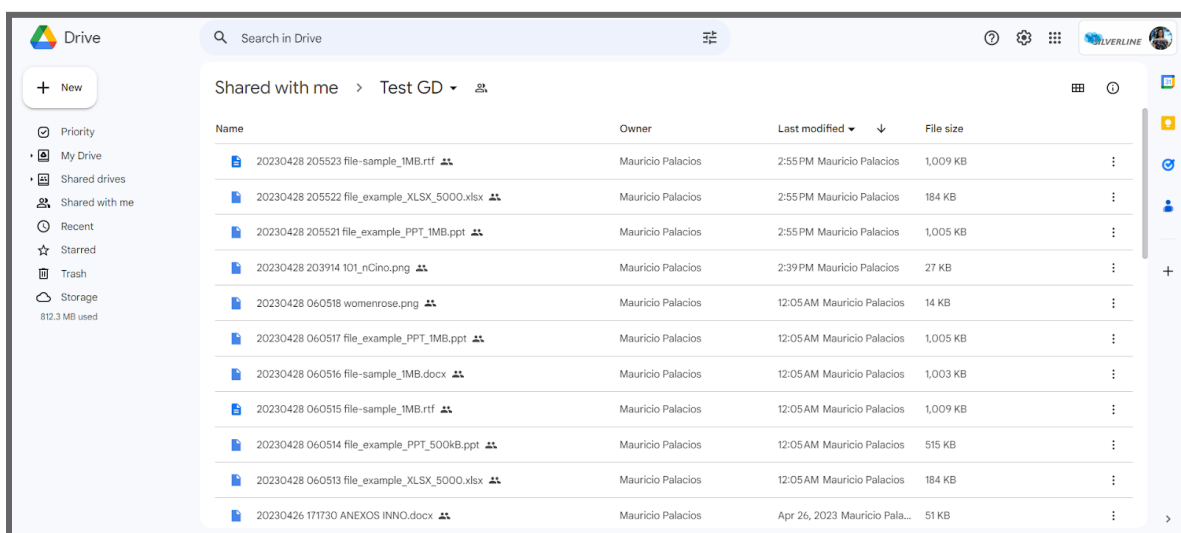
The DYF integration currently has a technical limitation: Files exceeding 12MB may fail to upload to Google Drive. Please ensure that files being uploaded manually or attached to records that trigger an automatic upload are below this size limit. We are actively working on increasing this limit in a future release.

Navigate to Google Drive

After uploading a file, you can easily access the corresponding Google Drive folder linked to the record. Simply click the “Go to Google Drive Folder” button to open the folder in a new tab and view your uploaded files.

Note: If no files have been uploaded yet, clicking the button will display a message prompting you to upload a file first.

1. Open the desired record in Salesforce.
2. At the top right of the page, click the “Go to Google Drive Folder” button to open the Google Drive folder where the files were uploaded.
 - a. Files are uploaded to a dedicated Google Drive folder named after the Salesforce record.
 - b. Each uploaded file will include the Salesforce record ID and the Date and Time stamp as a prefix in the file name. These are added automatically to support background processes that link the file to the correct record in Salesforce.

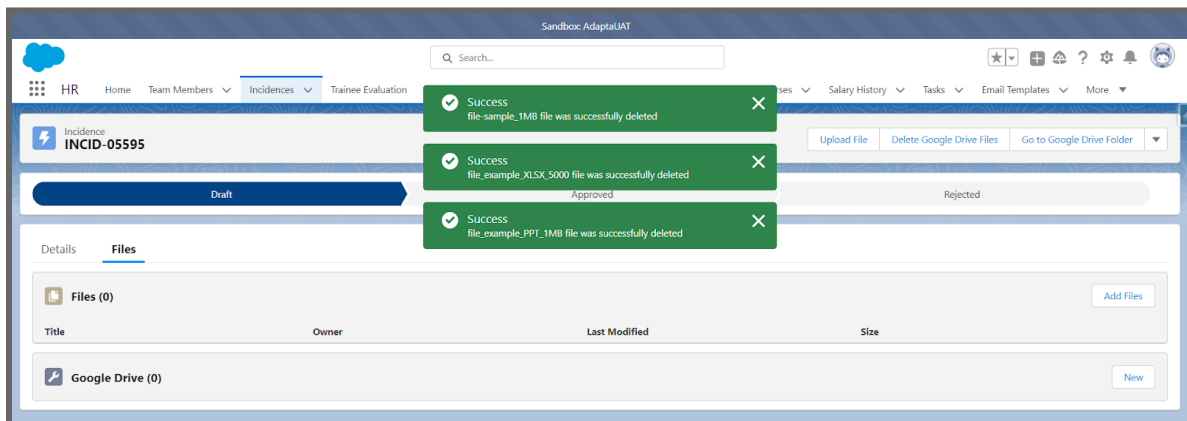
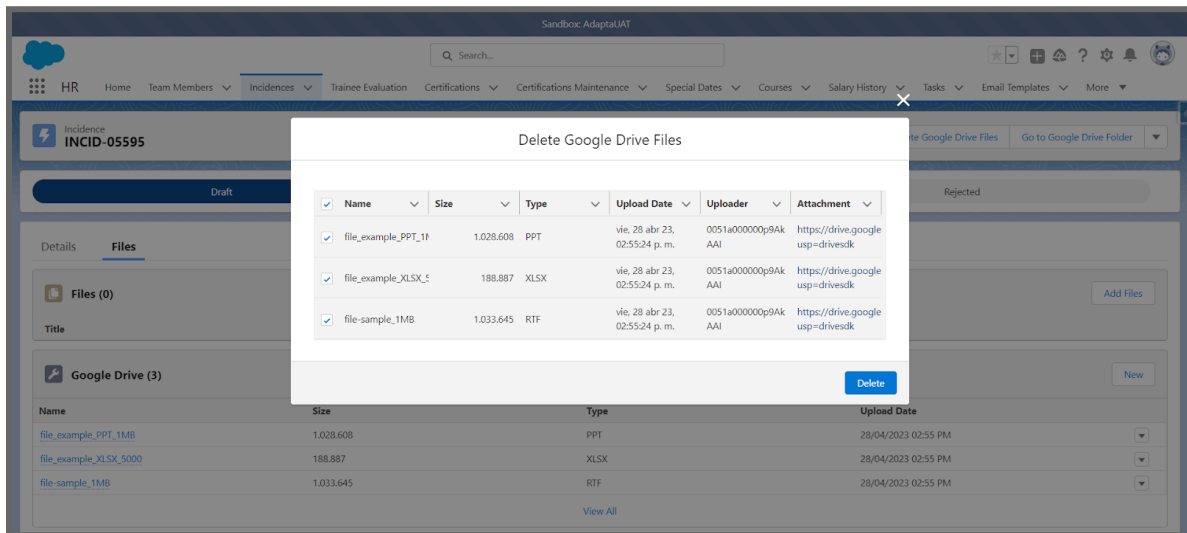


Delete a File

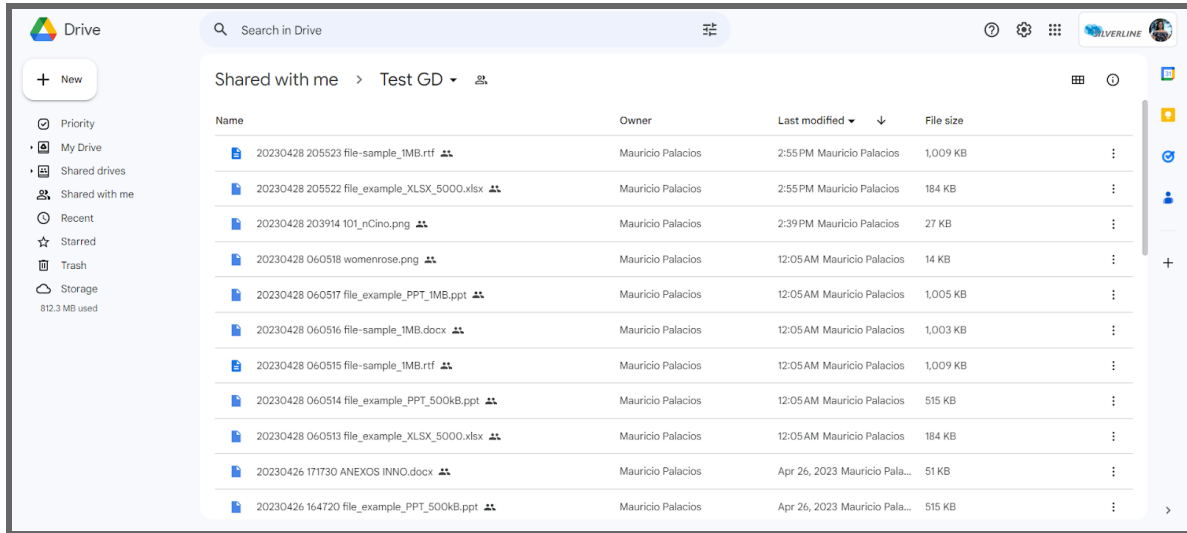
If you need to remove a file that was previously uploaded to Google Drive, you can do so directly from Salesforce. By clicking the “Delete Google Drive Files” button, you’ll be taken to a screen where you can select and delete files that were uploaded through the integration.

Important: Deleting a file using this feature will permanently remove it from Google Drive. Once deleted, the file will no longer be accessible from either Google Drive or Salesforce.

1. Navigate to the Salesforce record that contains the uploaded file you want to delete.
2. In the top-right corner of the page, click the “Delete Google Drive Files” button.
3. Select the files you want to delete by checking the box next to each file.
4. Click the “Delete” button to confirm your selection.
5. A confirmation message will appear once the files have been successfully deleted from Google Drive.



Once the process is complete, the selected files will be permanently deleted. If you navigate to the associated Google Drive folder, the deleted files will no longer be visible.



Automatic Upload to Google Drive (Zero-Setup Feature)

This section describes the powerful automatic file management capability of the DYF integration.

The Automatic Upload feature is designed to completely eliminate the need for manual file handling for key business processes, ensuring files are always backed up and accessible in Google Drive exactly when they are needed.

How It Works for You (End-User Experience)

This functionality is entirely configured by your IT Department and does not require any setup or ongoing action from you. Instead, the system monitors your Salesforce records for specific, pre-defined business conditions.

Important Note on File Size Limitation

The DYF integration currently has a technical limitation: Files exceeding 12MB may fail to upload to Google Drive. Please ensure that files being uploaded manually or attached to records that trigger an automatic upload are below this size limit. We are actively working on increasing this limit in a future release.

When the Upload Occurs	The Benefit for You
The system monitors record updates (e.g., when a Sales Opportunity moves to "Closed Won").	<u><i>Guaranteed Compliance</i></u> : Ensures critical files are instantly archived when a key business milestone is met.
The system automatically detects files attached to the record (in the Files related list).	<u><i>Zero Manual Intervention</i></u> : You simply attach the file to the Salesforce record, and the system handles the upload to Google Drive automatically.
The system runs immediately when the condition is met.	<u><i>Time Savings</i></u> : No need to stop your workflow to click the "Upload" button or manually select folders.

Important Considerations

- *Zero Setup Required*: As an end-user, you do not need to follow any configuration steps. This is handled by your administrator.
- *File Detection*: The system automatically detects files attached to the Salesforce record (in the Files related list) and uploads them.
- *Location of Files*: Once the automatic upload is triggered, the files are stored in a designated, organized folder structure within your Google Drive. Please refer to Section 7: Locating DYF Files in Google Drive for the exact folder location.

Special Consideration: Lead Conversion Logic

When using the Automatic Upload feature on the Lead object, DYF runs before the native Salesforce Lead conversion process. This ensures that all files attached to the Lead are successfully uploaded to Google Drive before the Lead is archived.

- **File Location**: The Google Drive folder remains linked to the original Converted Lead record.
- **Access**: If you need to access the Google Drive folder via the Converted Lead record, your System Administrator may need to enable the "View and Edit Converted Leads" permission for your user profile.

Locating Uploaded Files in Google Drive

In addition to uploading, viewing, and deleting files, users can manually navigate to the shared Google Drive folder that stores all uploaded files from Salesforce records. Each record with uploaded files will have its own dedicated folder in Google Drive, typically named after the record for easier identification.

The image shows two screenshots. The top screenshot is of the Google Drive interface. It displays a sidebar with navigation options like Home, Activity, Workspaces, My Drive, Shared drives, Shared with me, Recent, and Starred. The main area shows a search bar and a list of folders shared with the user. The folder 'United Oil & Gas Corp. - 001ak00000nUzYBAA0' is highlighted with a green box. The bottom screenshot is of the Salesforce interface. It shows the 'United Oil & Gas Corp.' account page. The 'Related' section shows contacts and opportunities. The 'Activity' section shows upcoming and overdue activities. The 'Go to Google Drive Folder' button is visible in the top right corner of the account page.

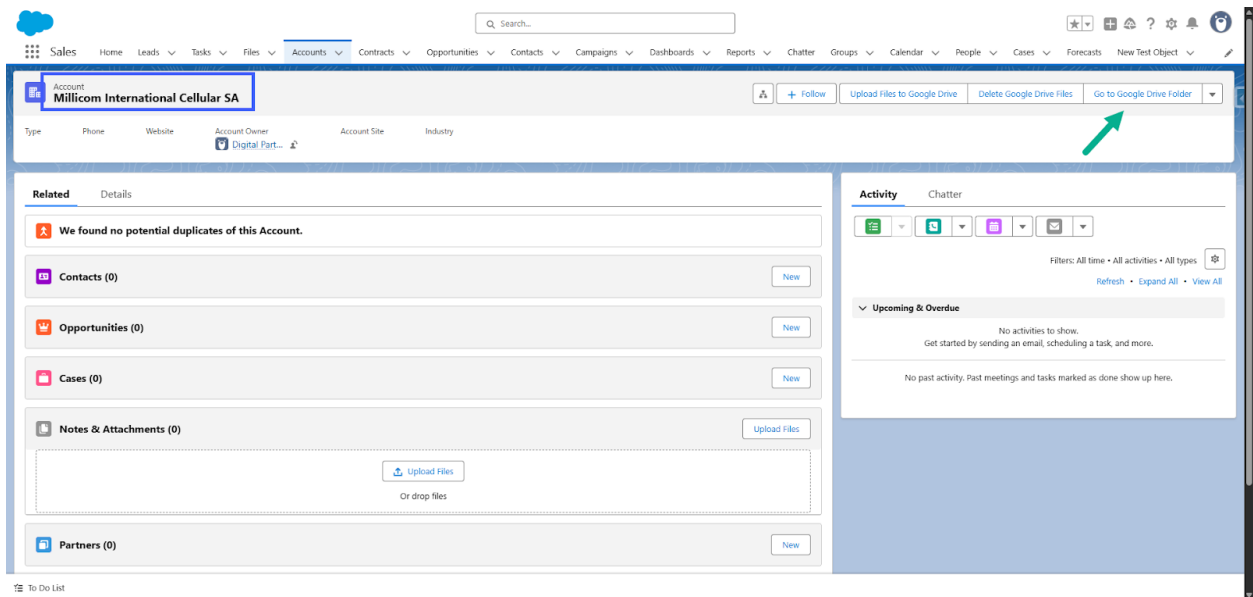
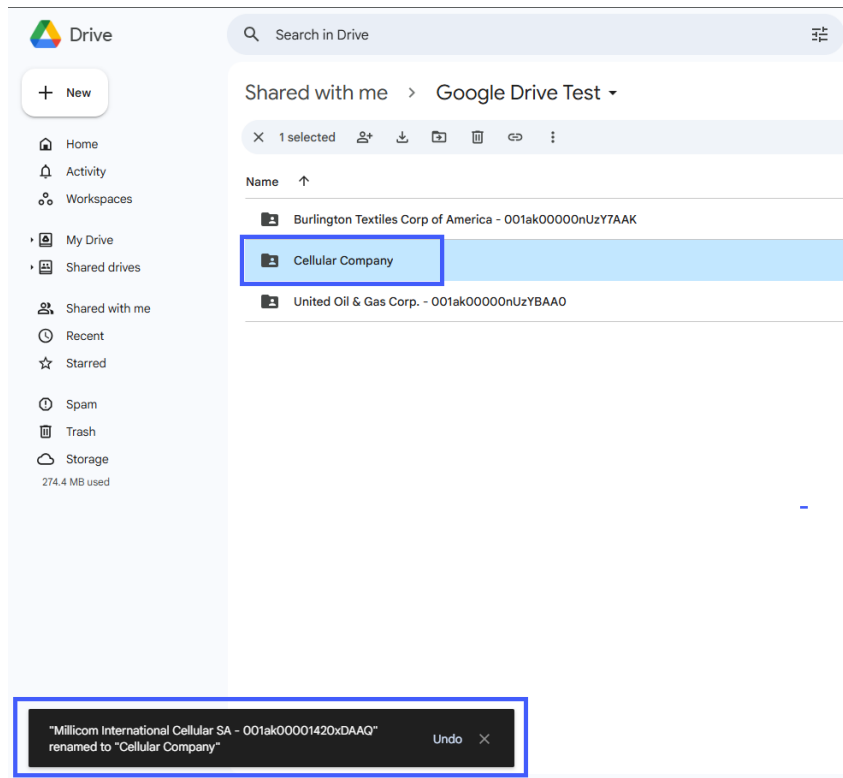
Google Drive Interface:

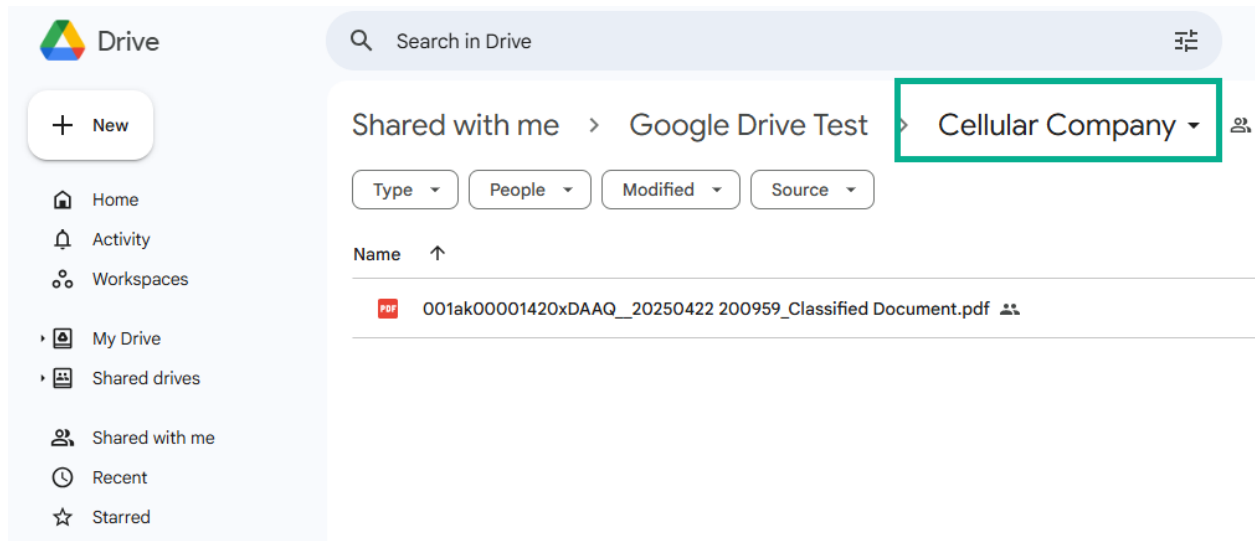
- Search in Drive
- Shared with me > Google Drive Test
- Filters: Type, People, Modified, Source
- Folder list:
 - Burlington Textiles Corp of America - 001ak00000nUzY7AAK
 - Millicom International Cellular SA - 001ak00001420xDAAQ
 - United Oil & Gas Corp. - 001ak00000nUzYBAA0**

Salesforce Interface:

- Account: United Oil & Gas Corp.
- Buttons: + Follow, Upload Files to Google Drive, Delete Google Drive Files, Go to Google Drive Folder
- Related Section:
 - Contacts (4): Lauren Boyle, Avi Green, Stella Pavlova, Arthur Song
 - Opportunities (6+): United Oil Standby Generators, United Oil SLA, United Oil Refinery Generators
- Activity Section: Upcoming & Overdue

To locate a specific folder, users can search Google Drive using the record name. However, if a folder name has been manually changed in Google Drive, it may no longer match the Salesforce record name. In that case, the folder can still be accessed from within Salesforce using the “Go to Google Drive Folder” button, which always opens the correct folder, even if it’s been renamed in Google.





Access Requirements and Considerations

- Users who do not have access to Salesforce but do have access to the shared Google Drive folder will still be able to view the files uploaded from Salesforce. This is because access permissions in Google Drive are managed independently and cannot be controlled or customized through Salesforce.
- If a user has access to Salesforce but does not have permission to view the Google Drive folder, they will not be able to see its contents after clicking the “Go to Google Drive Folder” button. Instead, they may see a screen prompting them to request access to the folder through Google Drive.

