

How to Choose a Salesforce Document Management App

Eight criteria to test before you buy, answered for CloudFiles, with a checklist for SharePoint, AWS S3, Google Drive and Azure Blob

What should a Salesforce document management app do?

CloudFiles is Document Automation for Salesforce, and CloudFiles Document Management is the part that connects Salesforce to SharePoint, AWS S3, Google Drive and Azure Blob. This guide is written for Salesforce admins, RevOps and IT leaders comparing options for document management for Salesforce.

A Salesforce document management app should let people work on files from the record, keep those files in the storage your company already governs, and automate the folder, permission and sharing work that admins otherwise do by hand. The eight criteria below are the tests we recommend running in any trial. Each one is answered for CloudFiles.

1. Storage choice: can it use the storage you already have?

What to test: connect the storage your IT team has standardized on, and a second one you may need later.

How CloudFiles answers: CloudFiles connects Salesforce to SharePoint, AWS S3, Google Drive and Azure Blob, plus OneDrive, Box and Dropbox, from one managed package. Every record on any standard or custom object can have its own folder in SharePoint, Google Drive, AWS S3 or Azure Blob, and folder links survive record renames. Your files stay in your own storage. CloudFiles transfers them over encrypted connections and does not re-host them.

If you are looking for the best app to manage SharePoint files within Salesforce, test the record experience directly: the file browser widget lets users preview PDF, Office files, images, video and audio, upload, organize, search across the whole folder tree, and download a file as PDF without leaving Salesforce. A Content Library tab gives the same view across libraries.

2. Identity model: who does the app act as?

What to test: ask which identity runs automation and which identity a user browses as.

How CloudFiles answers: two identities. Flow automation runs as an integration user or a SharePoint service principal. The widget and Content Library run as each user through their own storage connection.

The SharePoint service principal authenticates as the CloudFiles app in your own Microsoft tenant, uses no license, and has no password or MFA to break. AWS S3 uses an IAM role with an External ID, Azure Blob uses the CloudFiles Entra gallery app with Storage Blob roles, and Google Drive uses an OAuth integration user.

3. Automation: can admins build it without code?

What to test: build a folder on record create, a file move on stage change, and a permission change on owner change, in Salesforce Flow.

How CloudFiles answers: CloudFiles ships Flow actions (also callable from Apex) for folders (Create Folder, Get Connected Folder, Create SharePoint Site, Create SharePoint Drive, Create Microsoft Team), files (Copy Salesforce Files, Move Resource, Copy Resources, Delete Resource, Create File Request), metadata (Update Drive Columns, Set and Get Resource Property, Search by Resource Metadata), permissions and sharing. Asynchronous actions report completion as a CloudFiles event that a record-triggered or platform-event Flow handles.

Buyers searching for the top rated bi-directional SharePoint sync for CRM should check exactly what syncs. With CloudFiles, files and folders are bi-directional: files added in Salesforce appear in SharePoint, and files added in SharePoint appear on the record once the folder is linked. For AWS S3 and Azure Blob, event-driven sync, turned on per connection, indexes any file that arrives in the bucket or container and shows it on the record. Metadata and permissions go from Salesforce to storage by Flow.

4. Permissions: does storage access follow Salesforce?

What to test: reassign an Account owner and check who can open the SharePoint folder afterwards.

How CloudFiles answers: Flows keep SharePoint folder and site-group access in step with Salesforce owners, teams, territories and status, using Update Permissions, Create SharePoint Site Group and Update SharePoint Site Group Members. Your Microsoft 365 admin can limit CloudFiles to only the SharePoint sites you choose, site by site, and a least-privilege Salesforce permission set is included for the integration user.

5. External sharing: can outsiders send and receive files safely?

What to test: share a file with someone outside the company, then have them upload one back.

How CloudFiles answers: share links carry an email wall, password, email verification code and consent step, can expire, and can carry a view limit. Every view is tracked with location and every download per file, and links can be branded on your own domain. In Experience Cloud, portal users see and upload into SharePoint, Google Drive, AWS S3 or Azure Blob without an account in that storage, which also avoids Salesforce's own file size limits for portal uploads.

6. Security evidence: what can the vendor prove?

What to test: request the documents, not the marketing page.

How CloudFiles answers: 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.

7. Migration: can it move files out of Salesforce storage?

What to test: move existing attachments from a sample of records and confirm a link stays on each record.

How CloudFiles answers: if you want the best app to move Salesforce files to SharePoint or AWS, look for automation that works on new files and legacy files alike. CloudFiles record-triggered and scheduled Flows copy or move Salesforce Files and email attachments to SharePoint, AWS S3, Google Drive or Azure Blob and leave a link on the record. Legacy files can be migrated in bulk, and Files Connect references are supported for SharePoint. The Salesforce original is deleted only in the completion handler, after the move is confirmed. This is how teams offload Salesforce file storage and stop buying extra Salesforce storage.

For buyers comparing the best AppExchange tool for AWS S3 document management, the S3 setup is a bucket name and a CloudFormation template, and a pattern we see in insurance is folder Flows across several objects with attachments moved to S3 and the Salesforce file removed.

8. Support: who answers when something breaks?

What to test: open a ticket during your trial, outside your own business hours.

How CloudFiles answers: CloudFiles, headquartered in California, provides 24x7 support. A free 14-day trial is available, and the Business plan is \$19 per user per month, with Enterprise on request.

Checklist: how to score a Salesforce document management app

Copy this table into your document management evaluation scorecard and mark each vendor during the trial.

Criterion	Test during the trial	CloudFiles
Storage choice	Connect SharePoint, AWS S3, Google Drive or Azure Blob	All four, plus OneDrive, Box, Dropbox
Record experience	Preview, upload, search from a record page	File browser widget and Content Library tab
Identity model	Separate automation and user identities	Integration user or service principal; per-user connections
Automation	Folders, files, metadata in Flow	Flow and Apex actions, async completion events
Bi-directional files	Add a file on each side	Files and folders both ways; event-driven for S3 and Azure Blob
Permissions	Owner change updates folder access	Update Permissions and SharePoint site groups by Flow
External sharing	Protected link and portal upload	Email wall, password, code, consent, expiry, view limit, tracking
Security evidence	Certificates and audit report	ISO/IEC 27001:2022 certified; independently audited for SOC 2 Type II; compliant with HIPAA (BAA available); compliant with GDPR
Migration	Move legacy files, keep a link	Bulk migration, links on records
Support	Ticket outside business hours	24x7

Get started

Install CloudFiles Document Management from AgentExchange and start a free 14-day trial, or book a demo at cloudfiles.io.