



# DocCreate Instruction Guide

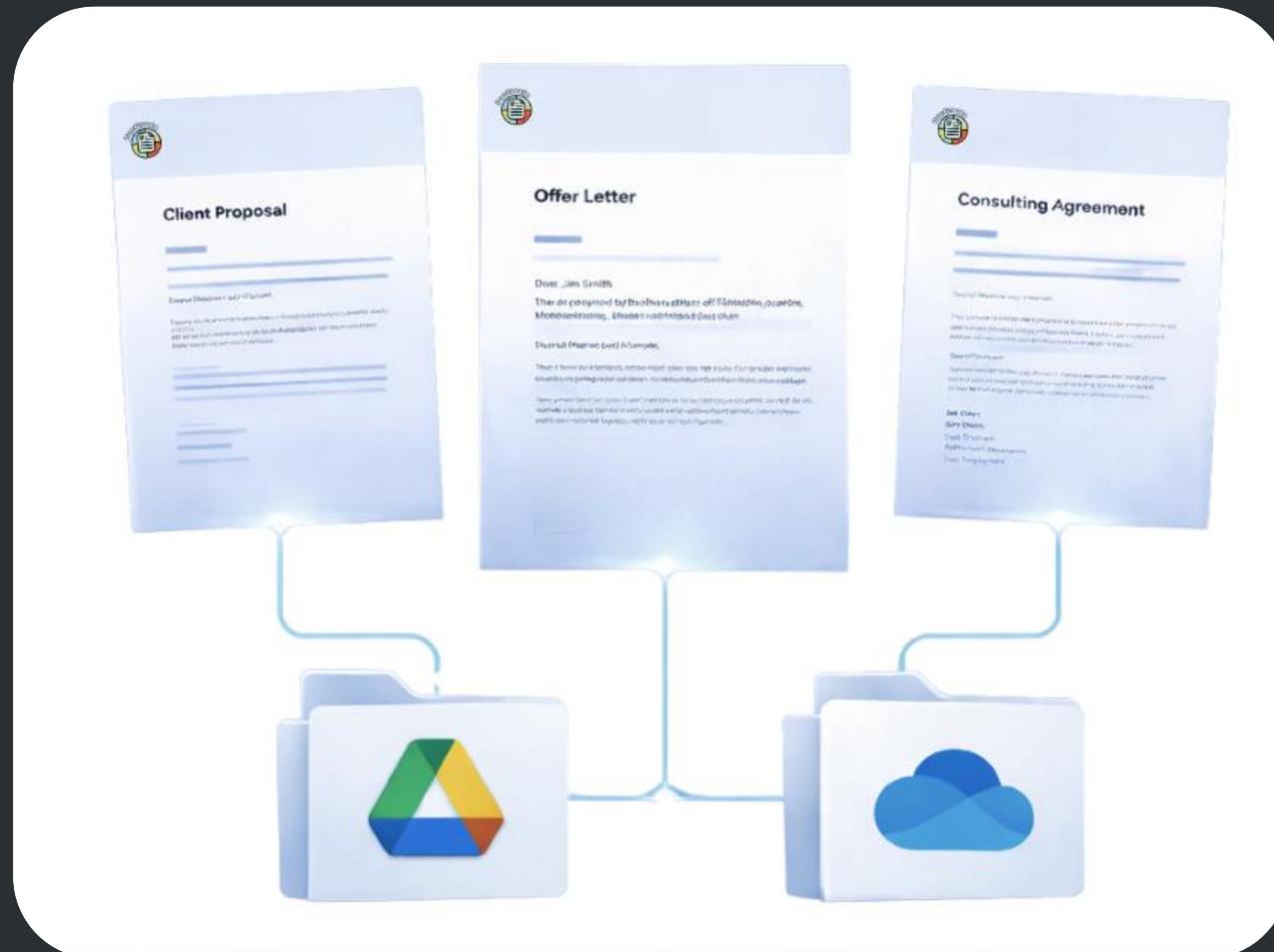


**NEW FEATURES RELEASE**

**2/5/26**



# Cloud Sync – User Guide for DocCreate



## Introduction

The Cloud Sync feature allows you to automatically upload files from your DocCreate board in Monday.com to your preferred cloud storage provider (Google Drive, OneDrive, SharePoint). This guide will walk you through the setup and usage.



# Step 1: Access DocCreate Board

i. Open Monday.com and navigate to your DocCreate board.

The screenshot shows the Monday.com interface for a board named "Employees". The board is currently in "DocCreate Board View", which is highlighted in the top navigation bar. A yellow arrow points to the "DocCreate Board View" tab. The board displays a table of employee records with columns for Employee, Hire Date, Years of Experience, Location, Status, and Manager. The status column is color-coded: orange for "In Progress", green for "Done", grey for "Not Started", and red for "Stuck".

Employee	Hire Date	Years of Experience	Location	Status	Manager
Alice Johnson	Mar 15	5	New York	In Progress	
Emily Zhang	Jul 23	6	Seattle	In Progress	
Bob Smith	Apr 1	8	San Francisco	Done	
Catherine Lee	May 20	3	Chicago	Not Started	
David Patel	Jun 10	4	Los Angeles	Stuck	
+ Add employee					
			26 sum		

Below the table, there is a button labeled "+ Add new group".



ii. Identify the file column where you want to integrate Cloud Sync.

The screenshot shows the Monday.com interface for an 'Employees' board. The 'DocCreate' app is integrated, and the 'DocCreate Board View' is active. A yellow arrow points to the '+ Add Column' button next to the 'Doccreate Template' column. The settings for the template are displayed in three panels:

- 1. Delivery Configuration:** Output Format is set to 'Docx' (checked) and 'Pdf' (unchecked). Export File Name is 'File Name (Optional)'. 'Send Email to selected Column' is checked, and the email column is set to 'Select Email Column'.
- 2. Template Helper:** Includes buttons for 'Sample Templates', 'Placeholder List', 'Image Placeholders', 'Table / Sub-item Placeholders', and 'List / Sub-item Placeholders'.
- 3. Upload Template:** Shows a document icon with a 'W' and the filename 'doccreate\_template.docx' with a trash icon.

At the bottom right, there are 'Cancel' and 'Save Template Setting' buttons.



# Step 2: Connect Your Cloud Account

i. Click the Connect Account button for your chosen cloud provider.

A screenshot of the Monday.com interface. The top navigation bar includes the Monday logo, "work management", an "Upgrade" button, and various utility icons. The main content area is titled "Employees" and shows a "New employee" form with fields for "File Name (Optional)", "Send Email to selected Column", and "Select Email Column". There are also sections for "Image Placeholders", "Table / Sub-item Placeholders", and "List / Sub-Item Placeholders". A "doccreate\_template.docx" file is shown in a preview area. At the bottom of the form are "Cancel" and "Save Template Setting" buttons. Below the form is a "Cloud File Sync" section with three cards for "Google Drive", "OneDrive", and "SharePoint", each with a "Connect account" button. A large yellow arrow points to the "Connect account" button for Google Drive. The left sidebar shows navigation options like "Home", "My work", "Recents", "More", "Monday AI", "AI Agents", "AI Notetaker", "Favorites", and "Workspaces".



- ii. A browser window will open for OAuth authentication.
- iii. Authorize the app to access your cloud account.

The screenshot shows a Google OAuth authentication window. At the top left, it says "Sign in with Google". Below that is the DocCreate logo. The main heading reads "DocCreate wants access to your Google Account". A black redaction box covers the text below the heading. On the right side, there is a blue information box that says "DocCreate already has some access" and "See the 3 services that DocCreate has some access to." Below this, it says "Make sure you trust DocCreate" and "Review DocCreate's Privacy Policy and Terms of Service to understand how DocCreate will process and protect your data." It also includes links to "Google Account" and "Learn how Google helps you share data safely." At the bottom, there are two buttons: "Cancel" and "Continue". A yellow arrow points to the "Continue" button. At the very bottom, there are links for "Help", "Privacy", and "Terms".



- iv. After successful authorization, you will be redirected back.
- v. The connection is now complete.

## GOOGLE DRIVE Connected Successfully

Thank you for connecting your GOOGLE DRIVE account with  
DocCreate.

You may now return to DocCreate and refresh the page to start  
using your connected cloud provider.

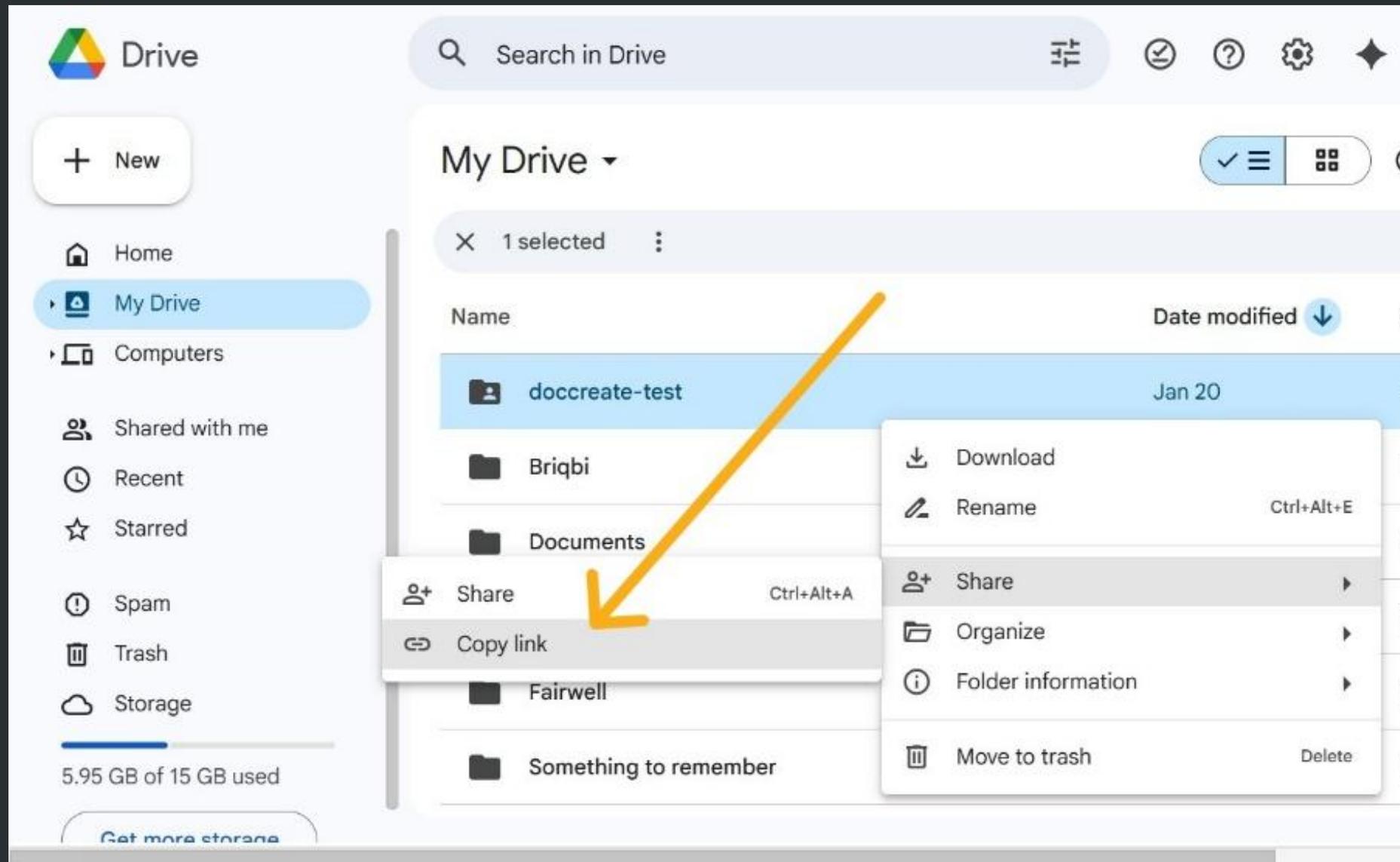
**This window will close in 10 seconds**

[Close this Window Now](#)

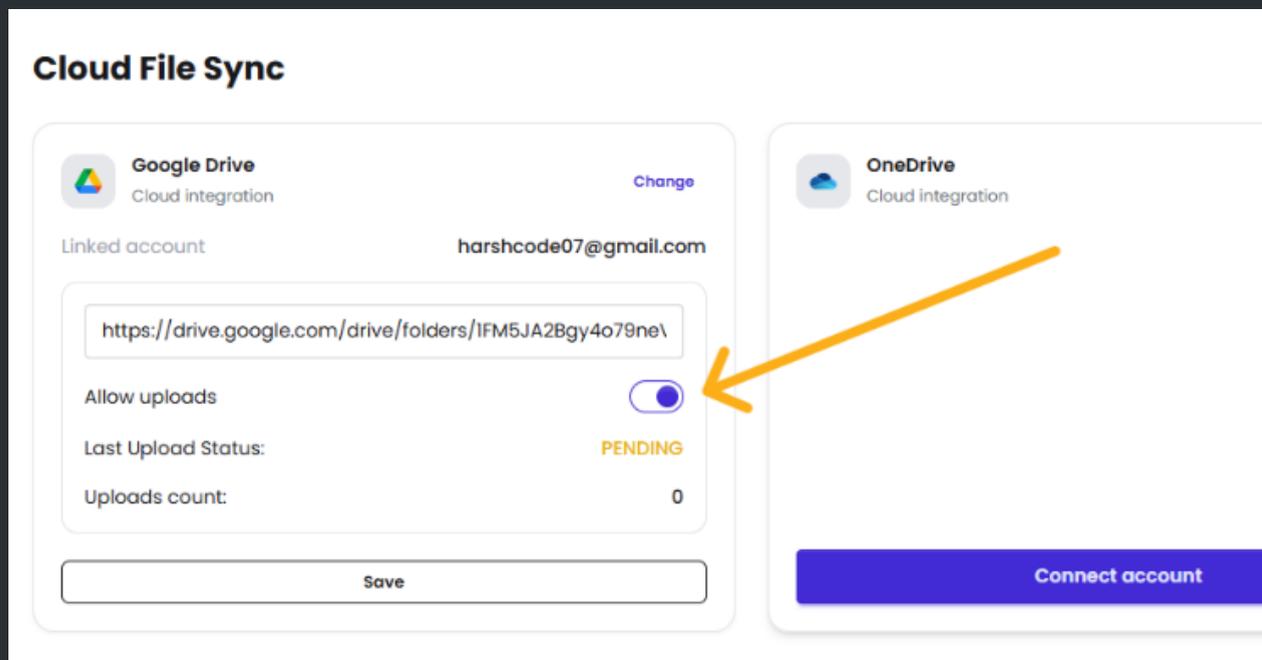


## Step 3: Configure Cloud Sync Settings

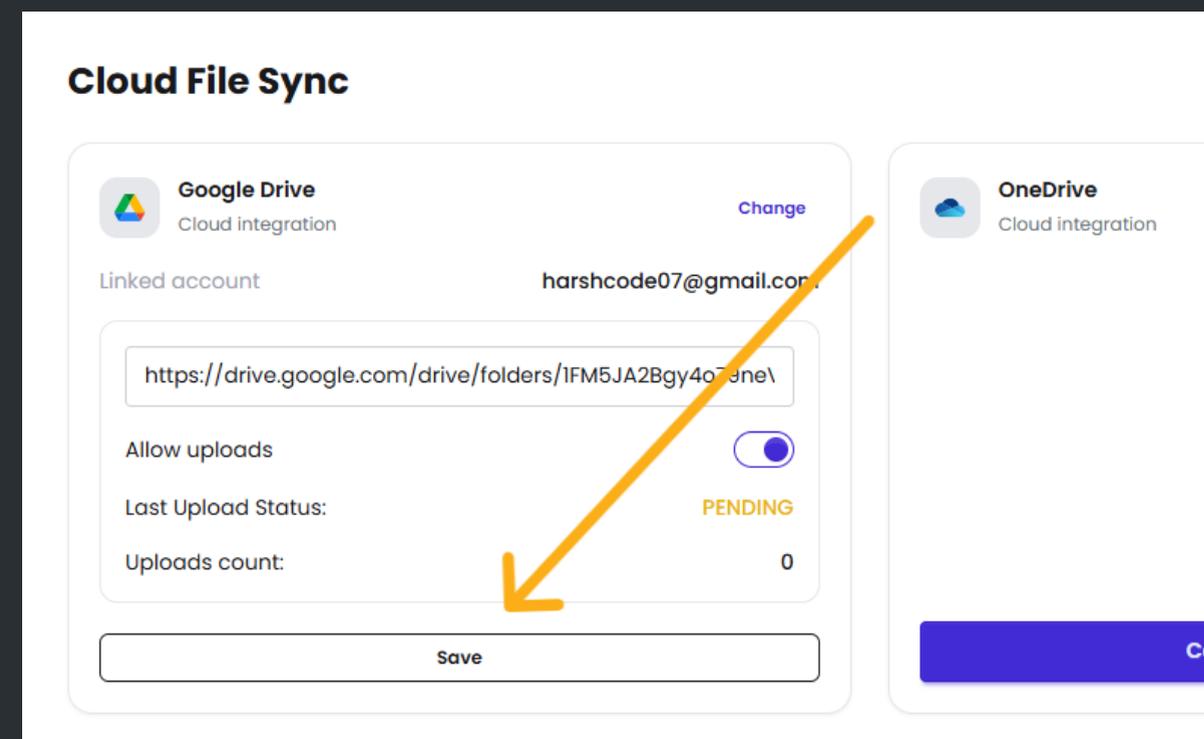
i. Specify the folder path in your cloud storage where DocCreate files should be saved.



ii. Enable the “Allow Upload” toggle to permit automatic uploads.



iii. Click Save to store your Cloud Sync settings.





## Step 4: Trigger File Uploads

i. Use the trigger automation button for your file column on the Monday board.

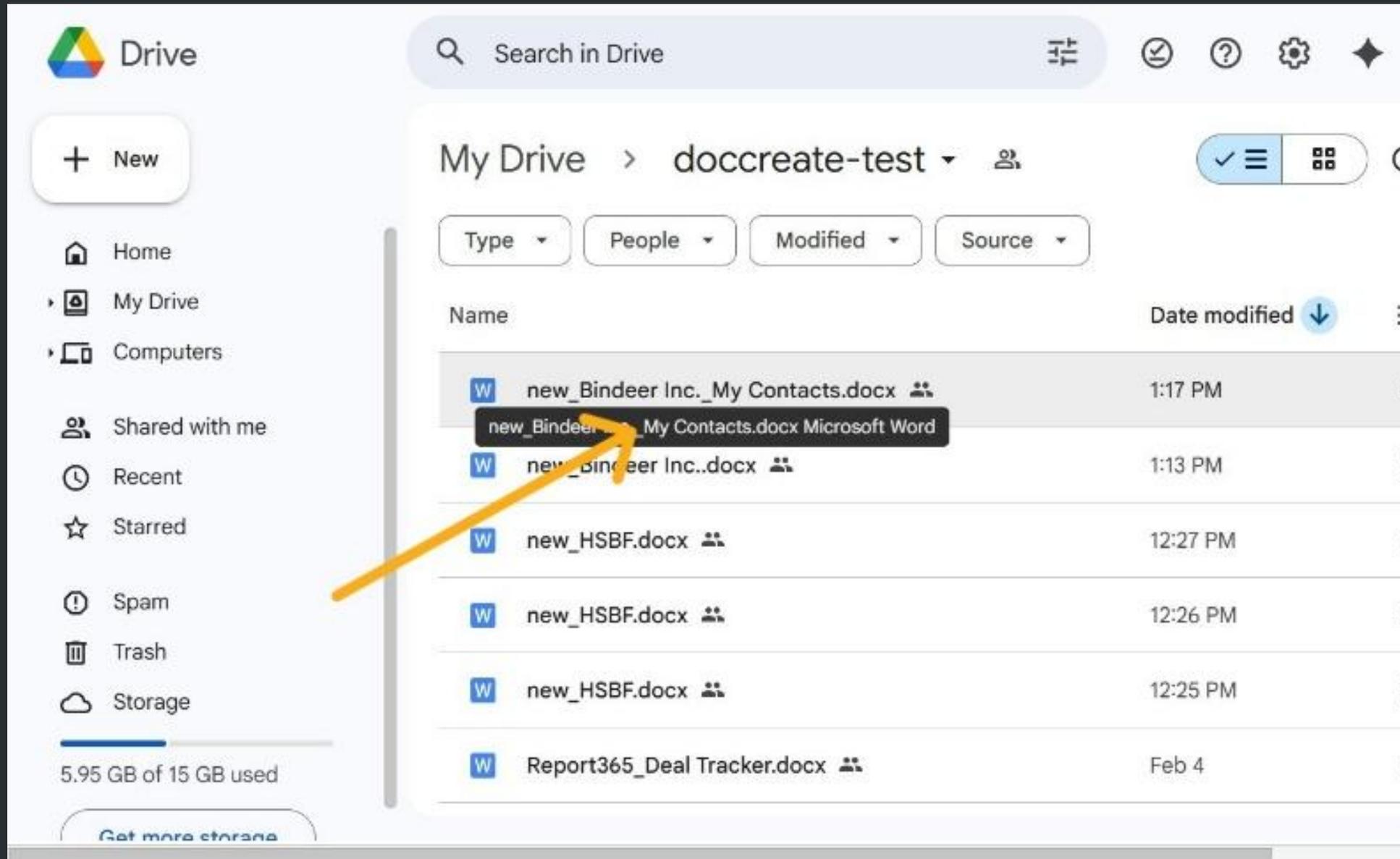
The screenshot shows a Monday.com board with a table. The table has the following columns: Date, Years of Experi..., Location, Status, Manager, Salary, Doccreate Templ., Button, and a plus sign. The rows are as follows:

Date	Years of Experi...	Location	Status	Manager	Salary	Doccreate Templ..	Button	+
Mar 15	5	New York	In Progress		\$60,000		Click me	
Jul 23	6	Seattle	In Progress		\$70,000		Click me	
Apr 1	8	San Francisco	Done		\$80,000		Click me	
May 20	3	Chicago	Not Started		\$75,000		Click me	
Jun 10	4	Los Angeles	Stuck		\$65,000		Click me	
	26 <small>sum</small>				\$350,000 <small>sum</small>			

A yellow arrow points to the "Click me" button in the "Button" column of the row with "Chicago" as the location.



ii. Files in the column will now be uploaded automatically to your connected cloud account.





iii. Upload progress and status can be monitored in DocCreate.

### Cloud File Sync

**Google Drive**  
Cloud integration [Change](#)

Linked account: **harshcode07@gmail.com**

Allow uploads:  [Change](#)

Last Upload Status: **SUCCESS**

Uploads count: **1**

**OneDrive**  
Cloud integration

## Supported Cloud Providers

You can connect multiple accounts and manage folder paths separately for each provider.



## TIPS

Make sure you have permissions to create folders and upload files in your cloud account.



# Dynamic File Naming – User Guide for DocCreate

---

## Introduction

DocCreate supports dynamic file naming using placeholders that pull data from Monday board columns. This helps automate file names based on each item's data, reducing manual work.



# Step 1: Open Template Settings

i. Open Monday.com and navigate to your DocCreate board.

The screenshot shows the Monday.com interface for a board named "Employees". The board is currently in "DocCreate Board View" mode, as indicated by the selected tab. A yellow arrow points to the "DocCreate Board View" tab. The board displays a table of employee records with columns for Employee, Hire Date, Years of Experience, Location, Status, and Manager. The status column is color-coded: "In Progress" (orange), "Done" (green), "Not Started" (grey), and "Stuck" (red). A summary row at the bottom shows a total of 26 employees. The left sidebar shows the navigation menu with "Employees" selected at the bottom.

Employee	Hire Date	Years of Experien...	Location	Status	Manager
Alice Johnson	Mar 15	5	New York	In Progress	
Emily Zhang	Jul 23	6	Seattle	In Progress	
Bob Smith	Apr 1	8	San Francisco	Done	
Catherine Lee	May 20	3	Chicago	Not Started	
David Patel	Jun 10	4	Los Angeles	Stuck	
+ Add employee					
			26 sum		



ii. Navigate to the template where you want dynamic file naming.

The screenshot shows the Monday.com interface for a board named 'Employees'. The 'DocCreate' app is integrated into the board. A yellow arrow points to the 'Doccreate Template' button in the top navigation bar. Below this, there is a section for configuring the template. The configuration is divided into three main sections:

- 1. Delivery Configuration:** Includes options for 'Output Format' (Docx is selected, Pdf is unselected), 'Export File Name' (with a text input field for 'File Name (Optional)'), and a toggle for 'Send Email to selected Column' (currently off).
- 2. Template Helper:** Includes buttons for 'Sample Templates', 'Placeholder List', 'Image Placeholders', 'Table / Sub-item Placeholders', and 'List / Sub-item Placeholders'.
- 3. Upload Template:** Includes a document icon and a text input field containing 'doccreate\_template.docx'.

At the bottom right, there are 'Cancel' and 'Save Template Setting' buttons.



## Step 2: Use '<' for Dynamic Inputs

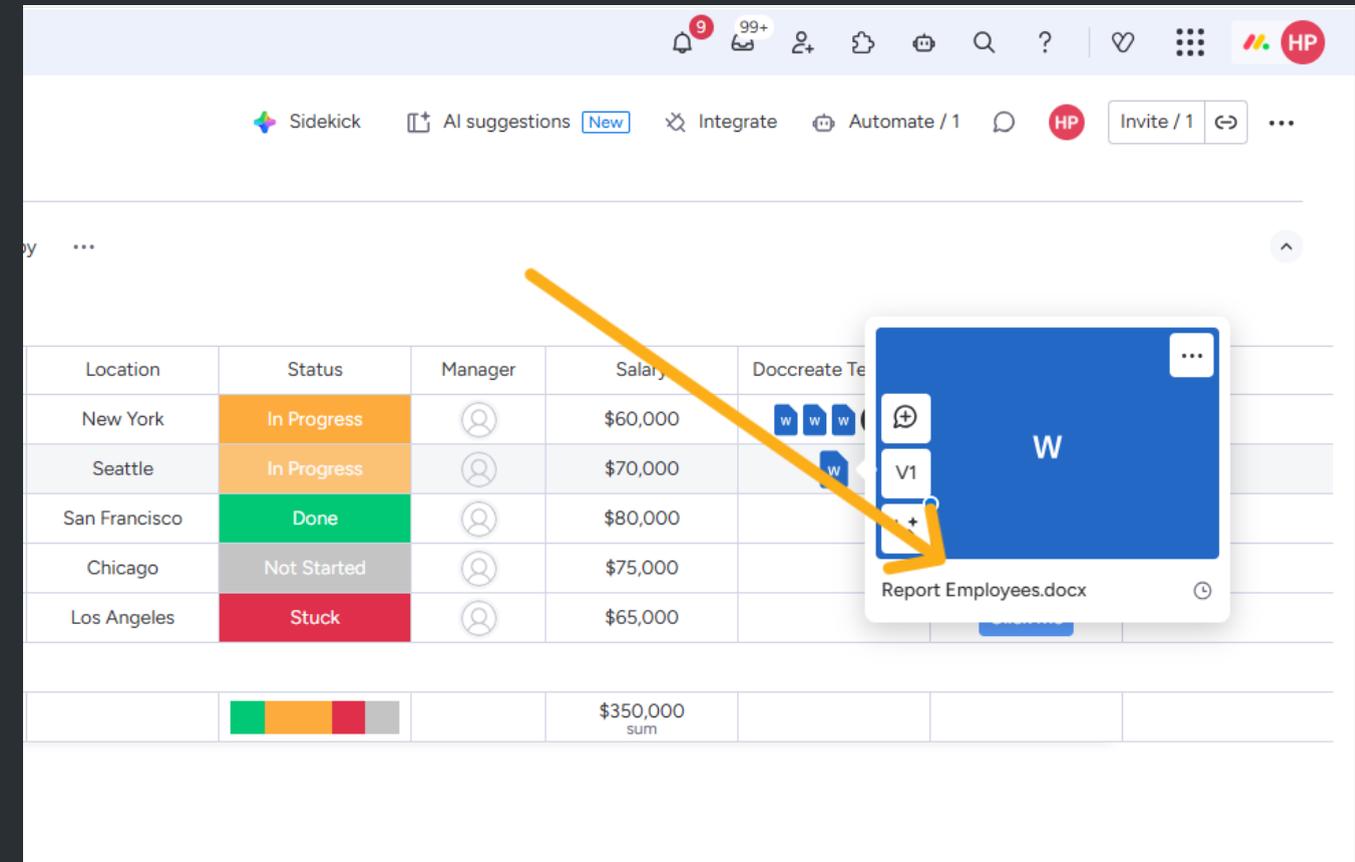
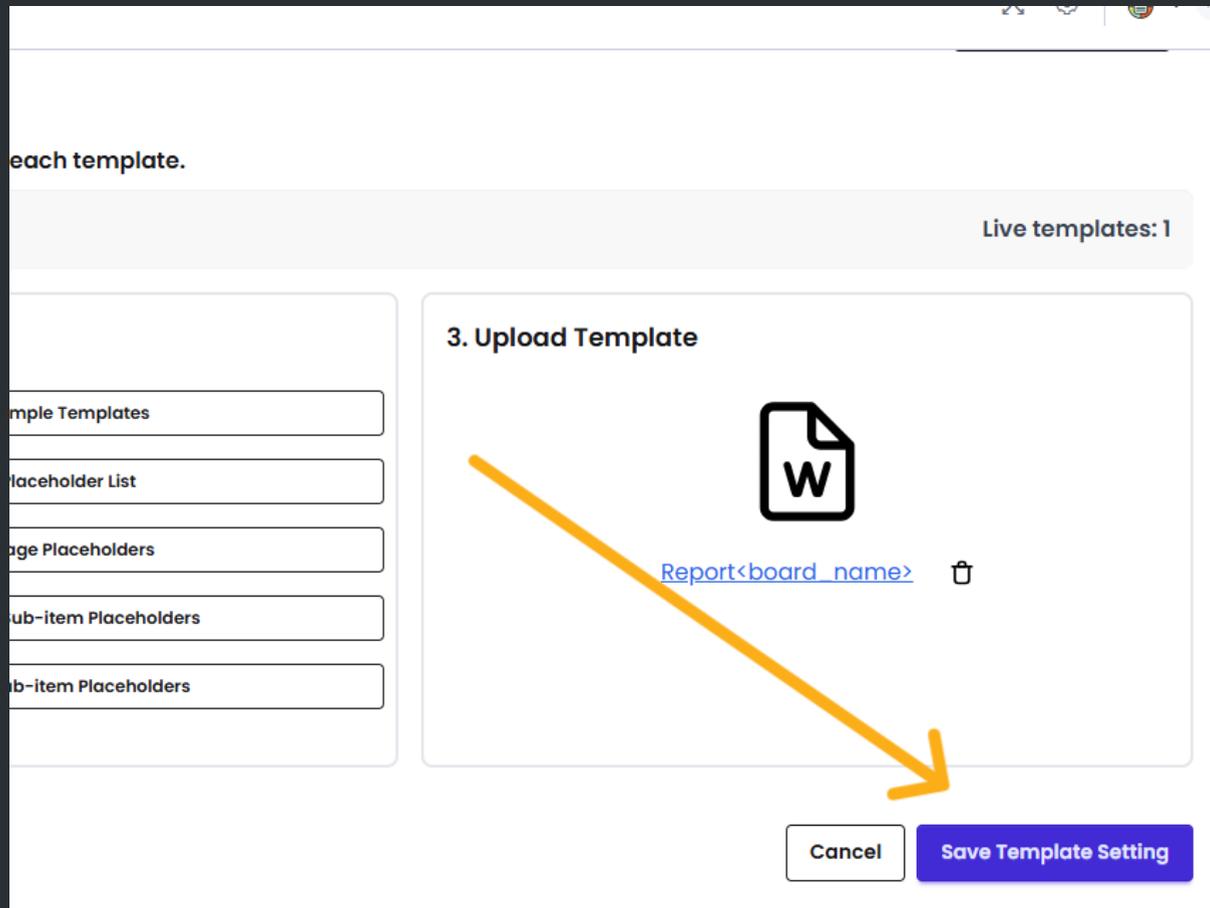
- i. While entering the file name, type '<'.
- ii. A dropdown will appear showing all available columns for the current item.
- iii. Select the column you want to insert into the file name.

A screenshot of the DocCreate web interface. At the top, there's a navigation bar with "New employee" selected, and search, person, and filter icons. Below that, a "Doccreate Template" button and a "+ Add Column" link are visible. The main content area is divided into two panels. The left panel, titled "1. Delivery Configuration", has an "Output Format" section with "Docx" selected and "Pdf" unselected. Below that is the "Export File Name" section, which includes a text input field containing "Report&lt;". A yellow arrow points from the text input field to the dropdown menu that has appeared below it. The dropdown menu lists several options: "Item Name", "Board Name", "Column: Hire Date", "Column: Years of Experience", and "Column: Location". To the right of the text input field, the text "Use '&lt;' for dynamic Inputs" is displayed. The right panel, titled "2. Template Helper", contains a list of template categories: "Sample Templates", "Placeholder List", "Image Placeholders", "Table / Sub-item Placeholder", and "List / Sub-item Placeholder". At the bottom of the left panel, the text "Cloud File Sync" is visible.



# Step 3: Save Template

i. The template will now generate files with names dynamically populated from the selected column data for each item. eg, Report\_Board1



Example:  
User types: Invoice\_<Board\_name>\_<Date>  
Generated File: Invoice\_AcmeCorp\_2026-02-05.pdf



# To Remove Dynamic Placeholders Automatically

If you have placeholders displayed above the file name input, you can cross them out. This will automatically remove placeholders from the final file name.

The screenshot shows the DocCreate interface. At the top, there's a navigation bar with 'New employee' and search/filter options. Below that is the DocCreate logo and tagline. The main content area has a heading: 'You can add multiple templates to a single board. Use this section to map your file columns to each template.' Below this is a '+ Add Column' button. The '1. Delivery Configuration' section is active, showing 'Output Format' with 'Docx' selected and 'Pdf' unselected. Under 'Export File Name', there's a text input field containing 'Report <board\_name>'. The placeholder '<board\_name>' is highlighted in blue and has a red 'X' over it, with a yellow arrow pointing to it. Below the input field is a 'Send Email to selected Column' toggle and a 'Select Email Column' dropdown. The '2. Template Helper' section on the right lists various placeholder types: 'Sample Templates', 'Placeholder List', 'Image Placeholders', 'Table / Sub-item Placeholders', and 'List / Sub-item Placeholders'.

## TIPS

Combine Cloud Sync and Dynamic File Naming for automated upload and organized files.

Dynamic inputs reduce manual renaming and help keep files consistent.



[www.flowtechapps.com](http://www.flowtechapps.com)

