DocCreate Instruction Guide
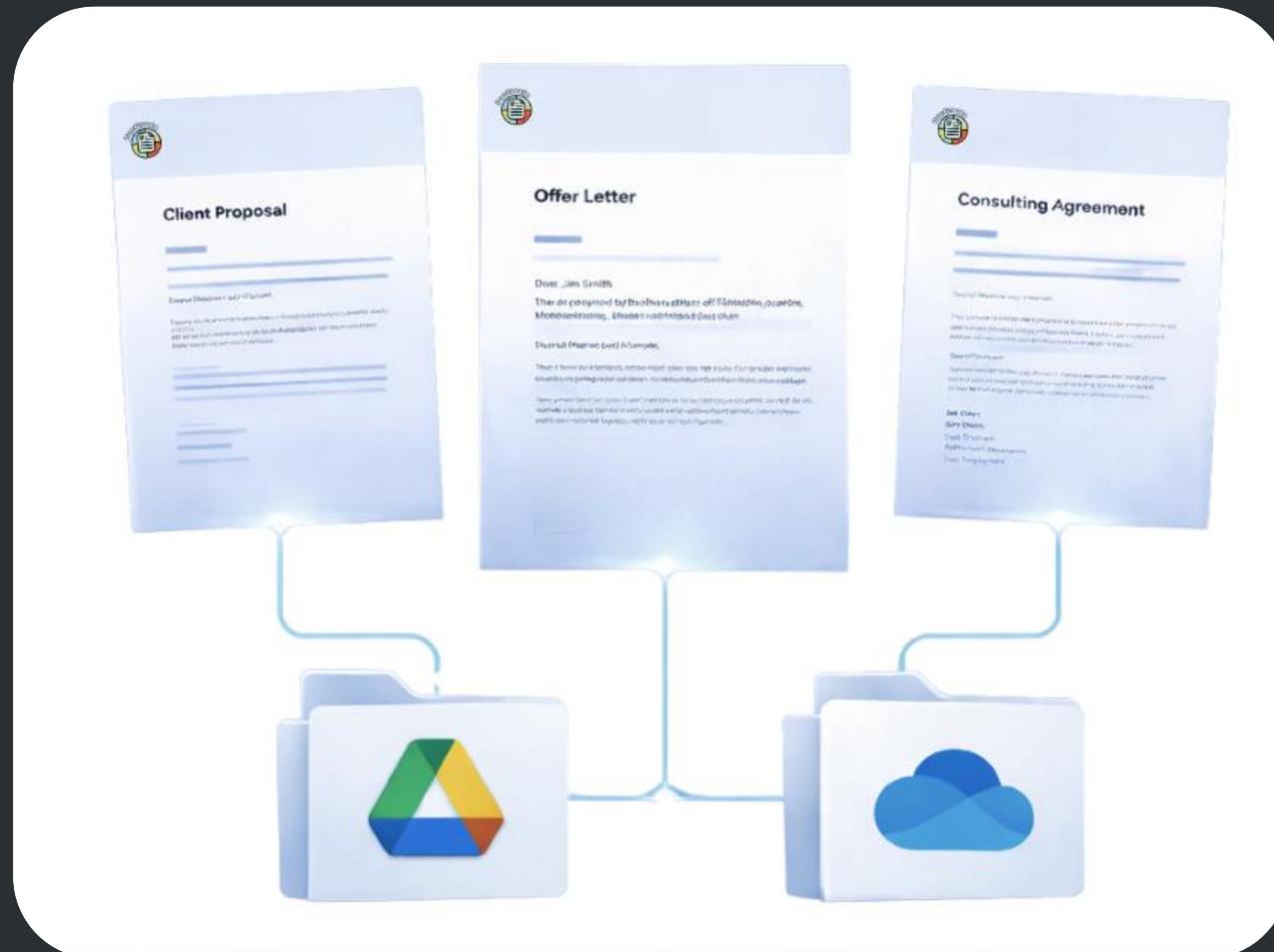
monday.com

NEW FEATURES RELEASE

2/5/26

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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.

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

Step 2: Connect Your Cloud Account

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

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

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.
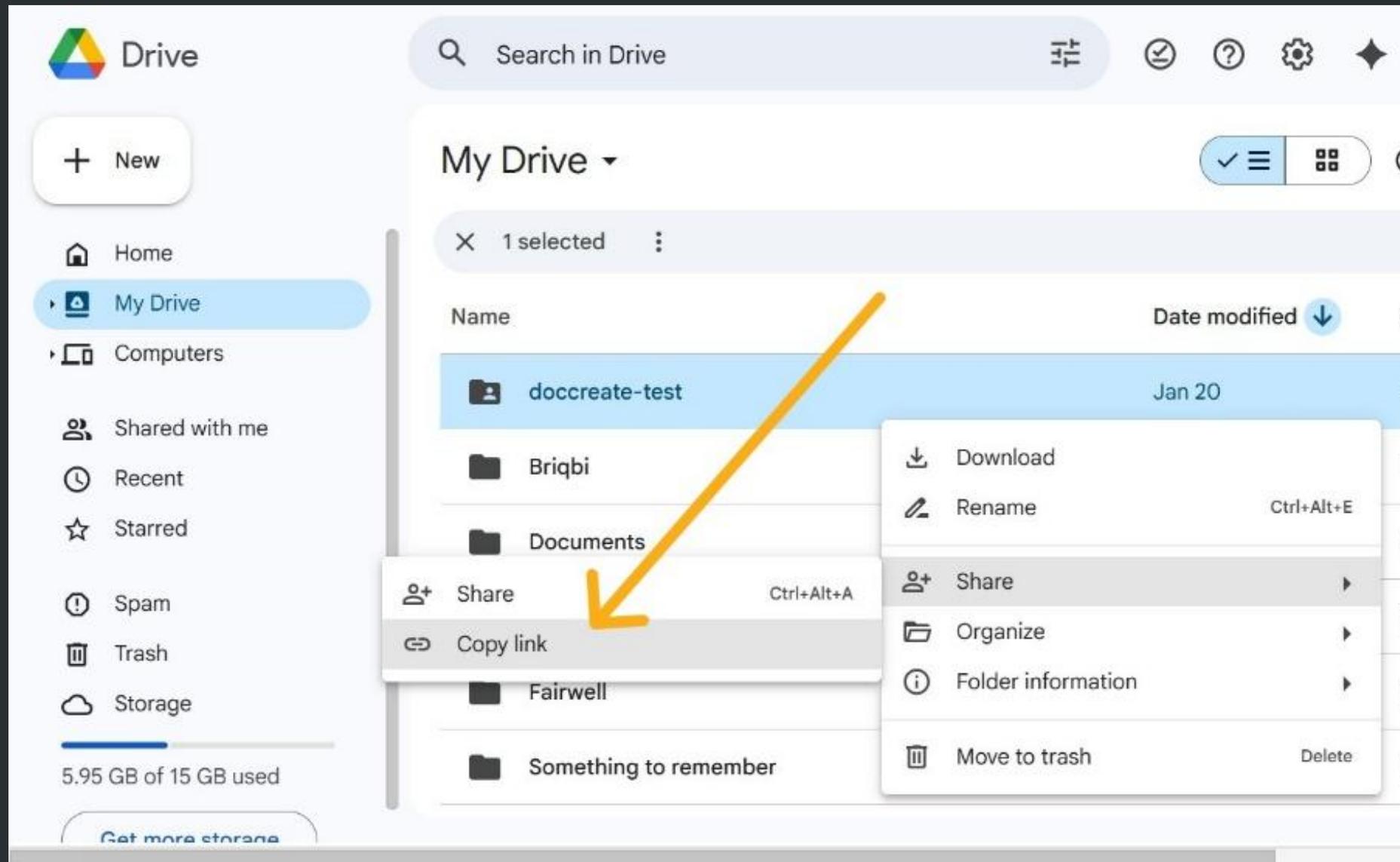
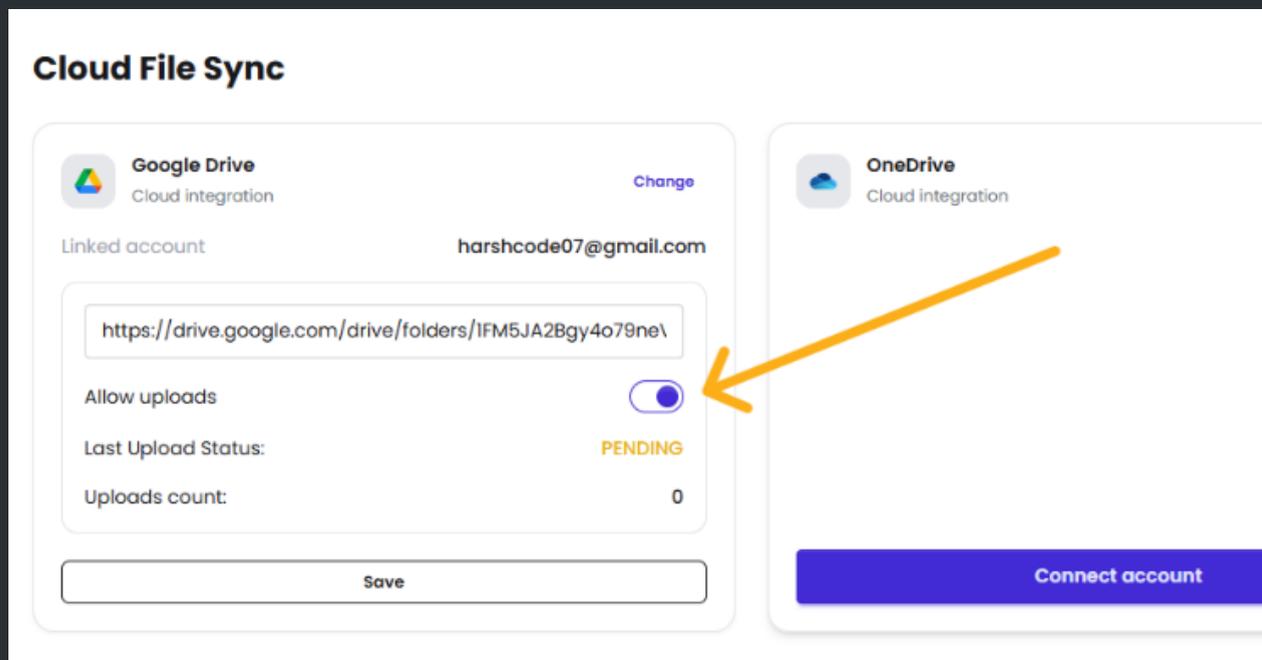**This window will close in 10 seconds**

Close this Window Now

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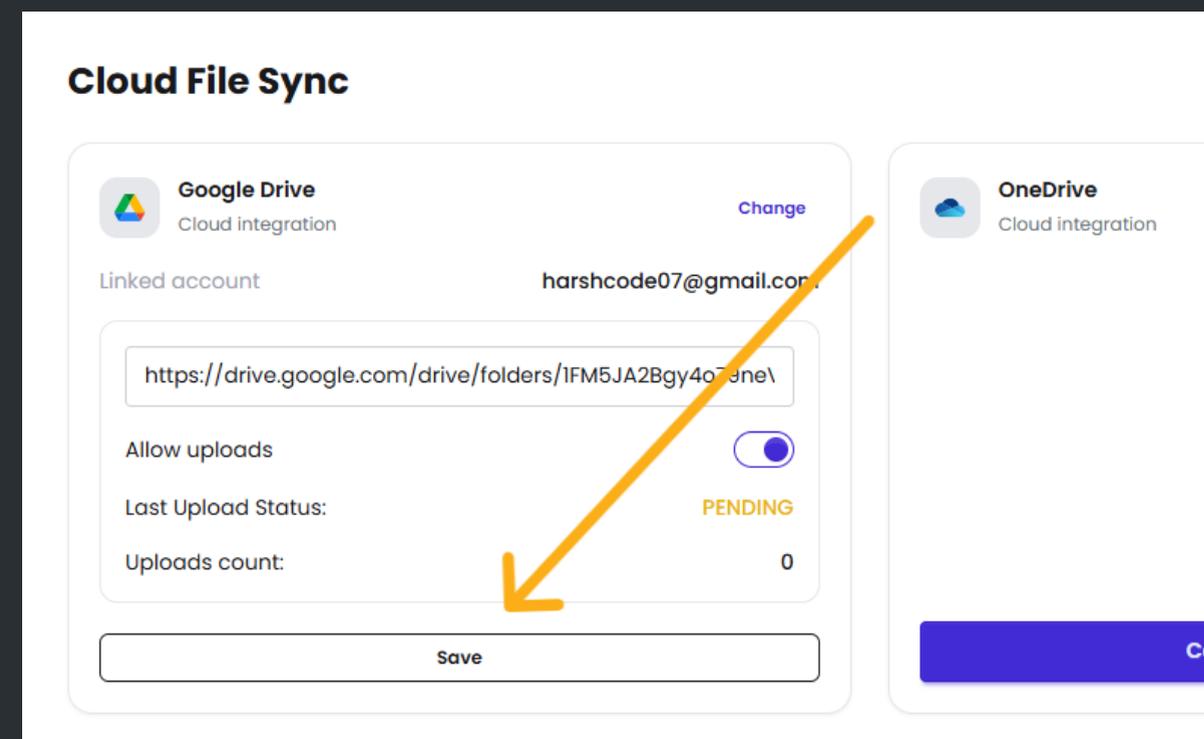# Step 3: Configure Cloud Sync Settings

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.

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Step 4: Trigger File Uploads

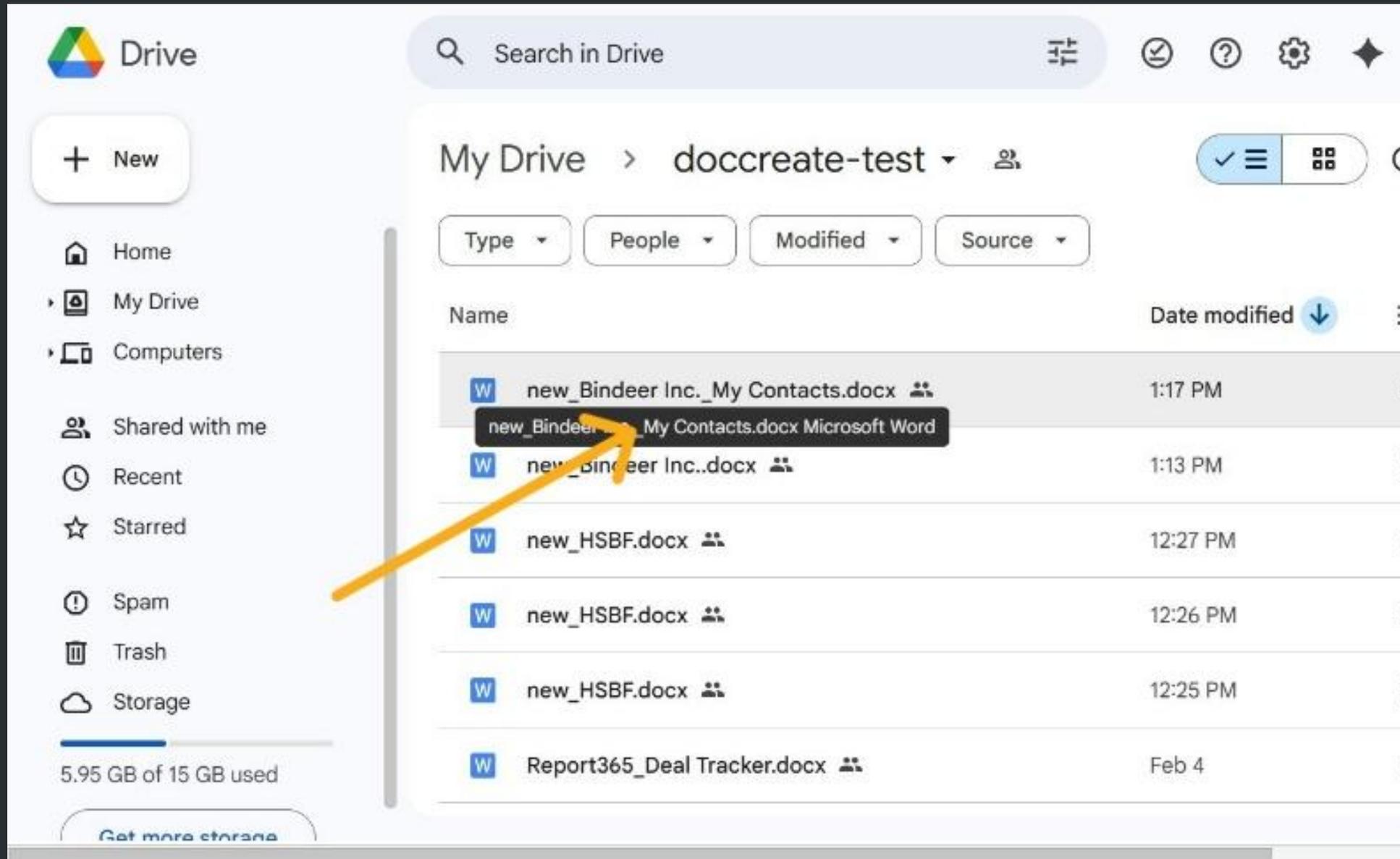i. Use the trigger automation button for your file column on the Monday board.

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.

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.

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

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.

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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
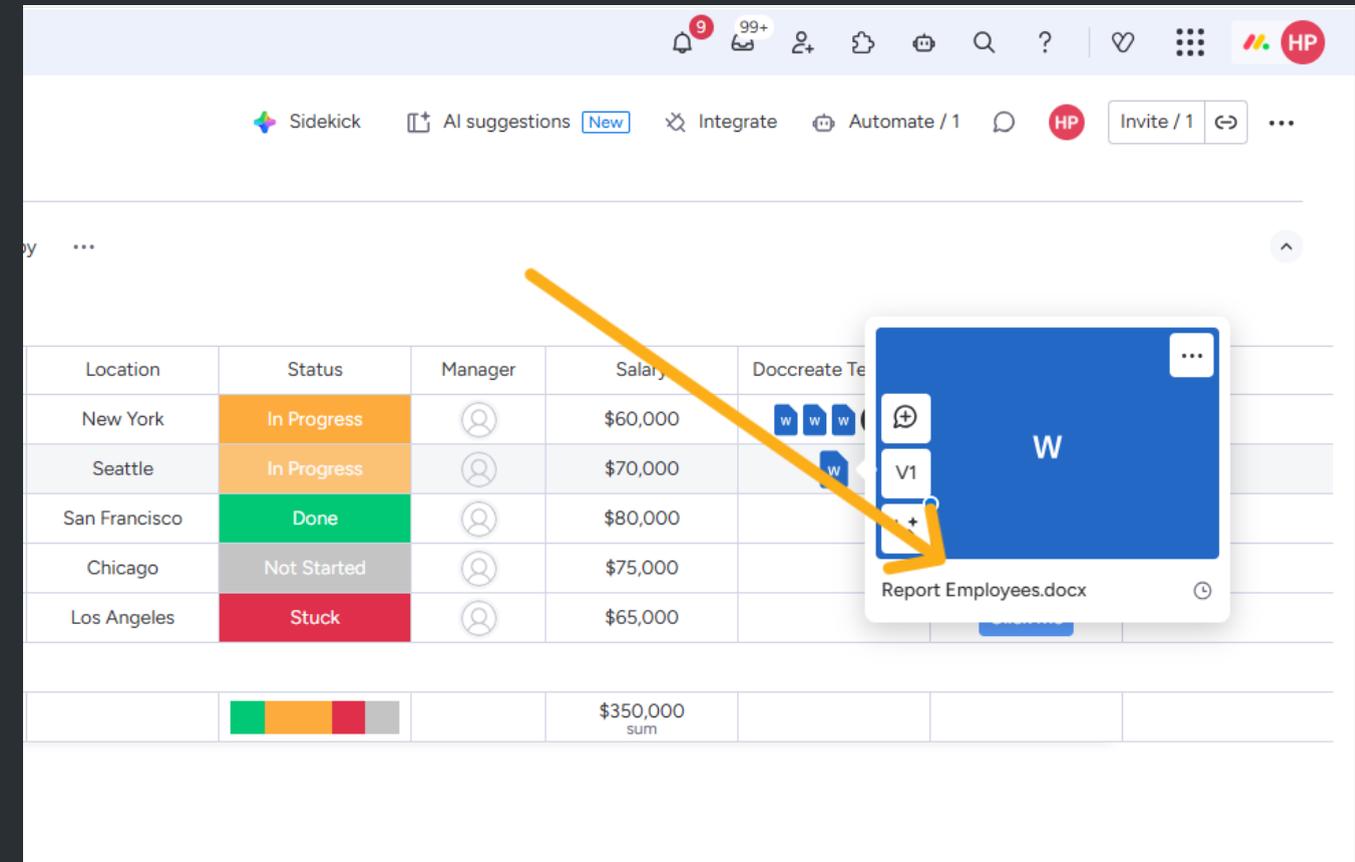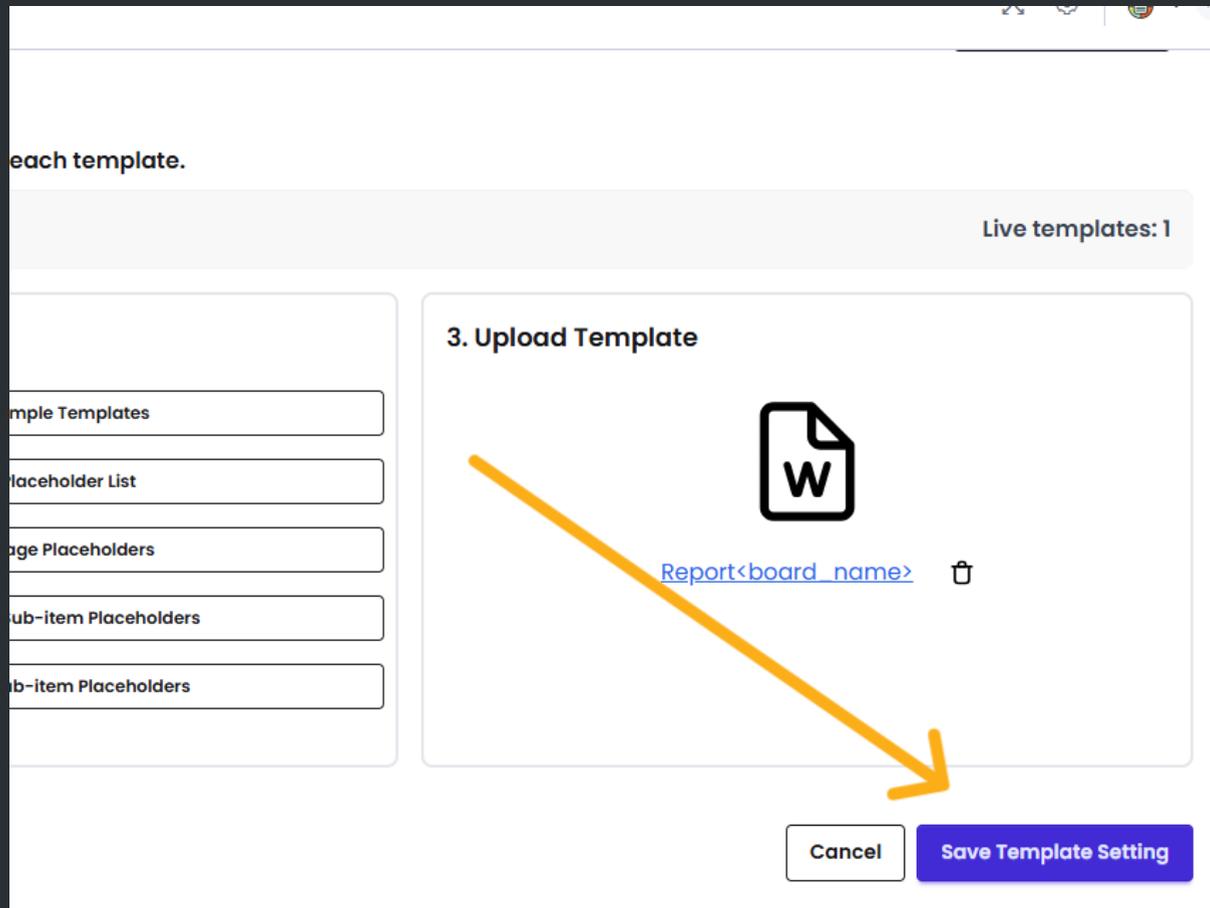
Example:
User types: Invoice_<Board_name>_<Date>
Generated File: Invoice_AcmeCorp_2026-02-05.pdf

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.

TIPS

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

Dynamic inputs reduce manual renaming and help keep files consistent.

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