

Salesforce SharePoint Integration Guide

Connect SharePoint folders and document libraries to any Salesforce record, standard or custom

What is CloudFiles Document Management?

CloudFiles is Document Automation for Salesforce. CloudFiles Document Management is the Salesforce SharePoint integration that puts SharePoint document libraries on every Salesforce record, standard or custom, and automates the folders, file uploads, permissions and secure sharing around them. The same app connects Salesforce to SharePoint, AWS S3, Google Drive and Azure Blob, along with OneDrive, Box and Dropbox, so one managed package covers every storage your teams use.

Document Management ships in one Salesforce managed package with Document Generation and Document AI. Admins install it from AgentExchange, connect SharePoint, and place the file browser on the record pages that need it.

What is the best app to manage SharePoint files within Salesforce?

The best app to manage SharePoint files within Salesforce is one where users never leave the record. CloudFiles adds a file browser widget to any Lightning record page: standard objects such as Account, Opportunity and Case, and every custom object you build. Users preview, upload, organize and search SharePoint files in place. A Content Library tab gives the same view across all connected libraries.

What users get on the record:

- A tree view of the attached SharePoint folders, with search across the whole folder tree.
- Previews for PDF, Office files, images, video and audio.
- Upload, multi-file delete, download a file as PDF, and print from preview when the admin enables it.
- The same experience for Google Drive, AWS S3 and Azure Blob folders, so a team that keeps contracts in SharePoint and archives in AWS S3 works from one widget.

How do I integrate SharePoint with Salesforce for document management?

To integrate SharePoint with Salesforce for document management, you connect SharePoint once, register the sites users can see, and link folders to records.

1. Connect SharePoint

Choose one of two ways to connect SharePoint:

- **A service principal.** This is app-only access: CloudFiles authenticates as the CloudFiles app in your own Microsoft tenant. It uses no license, has no password or MFA to break, and shows an "Active for automations" badge once it is ready.
- **An integration user,** if your team prefers a named account.

Your Microsoft 365 admin can limit CloudFiles to only the SharePoint sites you choose, granting access site by site. Each new site needs its own grant before CloudFiles can use it.

2. Register SharePoint sites

Admins register the SharePoint sites that users can see from Salesforce.

3. Place the widget

Add the CloudFiles file browser to the Lightning record page of each object. On the Salesforce side, assign a least-privilege Salesforce permission set.

Two identities, by design

Flow automation runs as the integration user or service principal. The widget and Content Library run as each user through their own storage connection. Automation keeps running when a person changes roles, and each user sees what their own access allows.

How do I connect SharePoint folders to Salesforce records?

Every record can have its own SharePoint folder. You connect SharePoint folders to Salesforce records by hand from the widget, or automatically with Salesforce Flow using the Create Folder action. Once a folder is linked, the link survives record renames, so the folder stays attached when an Account changes its name.

CloudFiles respects your existing SharePoint folder layouts. If your document libraries already follow a structure, link records to the folders you have rather than rebuilding them. When a file or folder already exists, admins choose the behavior per library: Rename, Replace, No Op or Fail.

Can I connect custom objects to SharePoint document libraries?

Yes. You can connect custom objects to SharePoint document libraries exactly as you connect Accounts or Opportunities. A custom Project, Matter, Property or Application object gets the same widget, the same record-linked folders and the same Flow actions.

Is this a bi-directional SharePoint integration for custom objects?

Yes, for files and folders. CloudFiles gives you bi-directional SharePoint integration for custom objects and standard objects alike, because it works on the live files through Microsoft's own API. There is one copy of each file, and it is in your SharePoint.

- Files added in Salesforce appear in SharePoint.

- Files added in SharePoint appear on the Salesforce record once the folder is linked.
- Deleting a file in Salesforce deletes it in SharePoint.

Metadata and permissions move one way, from Salesforce to SharePoint, by Flow. A column edited in the CloudFiles widget raises an event that a Flow can write back to the record.

Google Drive works on live files the same way SharePoint does. For AWS S3 and Azure Blob, CloudFiles offers event-driven sync, turned on per connection: a file that arrives in the bucket or container by any route is indexed and appears on the record.

How do I integrate SharePoint files into Salesforce objects with automation?

Salesforce Flow is how most admins integrate SharePoint files into Salesforce objects at scale. CloudFiles adds Flow actions, also callable from Apex, for folders, files, metadata, permissions and sharing.

Area	Flow actions
Folders	Create Folder, Get Connected Folder, Create SharePoint Site, Create SharePoint Drive, Create Microsoft Team
Files	Copy Salesforce Files, Create Salesforce File(s), Move Resource, Copy Resources, Delete Resource, Create File Request
Metadata	Update Drive Columns, Set/Get Resource Property, Search by Resource Metadata
Permissions	Update Permissions, Create SharePoint Site Group, Update SharePoint Site Group Members
Sharing	Create Link, Update Link Settings

To point a Flow at a specific SharePoint location, open the Content Library and choose "View Metadata" to open the Metadata for automation dialog. It lists the Library, Site Id, Drive Id and Folder Id a Flow needs, each with a copy button.

Typical triggers are a record being created, a stage or status change such as Closed Won, an owner or team change, and scheduled Flows.

How do SharePoint permissions stay in step with Salesforce?

Flows keep SharePoint folder and site-group access in step with Salesforce owners, teams, territories and status. Update Permissions grants or revokes read or write access by email, or by Salesforce user or group. Users need no SharePoint rights for the widget experience when an admin designs it that way, and external users never need SharePoint access.

Can I share SharePoint files securely outside the company?

Yes. Share links can carry an email wall, a password, an email verification code and a consent step. Links can expire and can carry a view limit. Every view is tracked with location and every download is tracked

per file. White-label and custom domains are available for share links.

With Experience Cloud, you share SharePoint folders and files with community and portal users, configured per widget. External users can upload into SharePoint, Google Drive, AWS S3 or Azure Blob without an account in that storage.

Security and compliance

- 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, including the ISO certificates, the SOC 2 Type II report and a penetration test summary, are available under NDA from the CloudFiles Trust Center.

Why teams choose CloudFiles for Salesforce SharePoint integration

- Users stop working in two windows: SharePoint files sit on the Salesforce record.
- Stored SharePoint URLs that break when folders move are no longer needed.
- SharePoint keeps its version history and audit trail.
- Existing SharePoint folder layouts are respected.
- Teams replacing Files Connect, Document Extractor or a sync tool that breaks on folder renames get one app that covers SharePoint, AWS S3, Google Drive and Azure Blob.
- 24x7 support from CloudFiles, headquartered in California.

Pricing

Business plan: \$19 (USD) per user per month. Enterprise: on request.

Get started

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