

A SharePoint Site for Every Salesforce Account: IT Services and Account Teams

Sites, libraries and site groups created from Salesforce Accounts and Opportunities, with access that follows the account team

CloudFiles is Document Automation for Salesforce. This guide describes a pattern we see among IT services and managed services firms: a SharePoint site for every Salesforce Account, a document library for every Opportunity, and access that follows the account team. CloudFiles also connects AWS S3, Google Drive and Azure Blob, but this pattern is built on SharePoint.

What problem do IT services account teams have with SharePoint?

An IT services firm runs its client relationships in Salesforce and its delivery documents in SharePoint: statements of work, solution designs, network diagrams, runbooks. Each new client needs a SharePoint site, set up the same way every time. In practice someone in IT builds it by hand, weeks after the deal starts, with whatever permissions they remember. When an account manager leaves or a territory is reassigned, the site's membership stays as it was. Lost deals leave live libraries behind that nobody owns.

The fix is to have Salesforce create and maintain the SharePoint structure, so the site exists the moment the Account does and its membership matches the account team.

Which Salesforce objects are involved?

- **Account:** the client. Each Account gets its own SharePoint site, created from a template.
- **Opportunity:** each deal gets its own document library inside the Account's site.
- **Account Team, Opportunity Team and Territory:** these drive who belongs to the site's groups.
- **Custom objects:** the same widget and Flow actions work on any standard or custom object, such as a Project or Contract record.

How do we create a SharePoint site per Account from Salesforce?

To create a SharePoint site per Account from Salesforce, an admin builds record-triggered Flows with CloudFiles Flow actions:

1. **Account created or qualified.** A record-triggered Flow calls **Create SharePoint Site**, using the site layout the firm has standardized on.

2. **Site groups created.** The Flow calls **Create SharePoint Site Group** to add groups such as Account Team (edit) and Delivery (read).
3. **Opportunity created.** A Flow calls **Create SharePoint Drive** to add a document library for the Opportunity inside the Account's site, then **Create Folder** to lay out the standard folders (Proposal, SOW, Design, Handover).
4. **Columns set. Update Drive Columns** writes Salesforce values, such as Opportunity stage, service line or close date, into SharePoint columns.
5. **Links for the client. Create Link** produces a secure share link for a client stakeholder when a proposal is ready.

The Site Id, Drive Id and Folder Id a Flow needs are listed in the View Metadata dialog in the CloudFiles Content Library, each with a copy button. About a third of CloudFiles actions are asynchronous: completion arrives later as a CloudFiles event that a record-triggered or platform-event Flow handles, so follow-on steps wait until the site exists.

How do SharePoint site groups follow the Account team?

SharePoint site groups for the account team are kept current by **Update SharePoint Site Group Members**. A Flow runs when the Account owner changes, when an Account Team member is added or removed, or when an Opportunity Team changes. It adds or removes the matching people from the right site group. For folder-level access, **Update Permissions** grants or revokes read or write by email, Salesforce user or group.

Permissions go from Salesforce to SharePoint by Flow. Salesforce is the source of truth for who is on the team, and SharePoint follows it.

Can we sync SharePoint permissions with Salesforce territories?

Yes. To sync SharePoint permissions with Salesforce territories, a Flow runs when an Account's territory assignment changes, or on a schedule. It reads the territory's users and calls **Update SharePoint Site Group Members** to replace the territory group's membership on that Account's site. A regional manager who takes over a territory gets access to its client sites, and the previous owner's access is removed in the same run.

This is where firms replacing Files Connect, Document Extractor or a sync tool that breaks on folder renames usually see the biggest change: access is no longer a ticket to IT.

How do we archive SharePoint on Closed Lost?

To archive SharePoint on Closed Lost, a record-triggered Flow fires when the Opportunity stage changes to Closed Lost:

1. **Update Permissions** revokes write access for the Opportunity team, leaving read access for the Account owner.

2. **Move Resource** moves the Opportunity's library content into an Archive folder on the Account's site.
3. **Update Drive Columns** stamps the stage and close date onto the folder so it can be found later.

A Closed Won branch can do the opposite: grant the delivery team access and create the handover folders.

What do users see in Salesforce?

The CloudFiles file browser widget sits on the Account and Opportunity Lightning record pages. Users preview, upload, organize and search files in the Account's SharePoint site without leaving Salesforce. Previews cover PDF, Office files, images, video and audio. The Content Library tab gives a wider view across libraries.

CloudFiles works on the live SharePoint files through Microsoft's own API, so there is one copy, in your storage. Files added in Salesforce appear in SharePoint, and files added in SharePoint appear on the record once the folder is linked.

Who runs the automation, and what can it reach?

Two identities are involved. Flow automation runs as a service principal or an integration user. The widget and Content Library run as each user through their own storage connection.

The service principal authenticates as the CloudFiles app in your Microsoft tenant, uses no license, has no password or MFA to break, and shows an "Active for automations" badge. Your Microsoft 365 admin can limit CloudFiles to only the SharePoint sites you choose, and each new site needs its own grant before CloudFiles can use it. On the Salesforce side, a least-privilege permission set is available for the integration.

Is it secure?

- 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 are available under NDA from the CloudFiles Trust Center.

Get started

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

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