

SharePoint Deal Folders for Private Equity and Deal Teams in Salesforce

Deal folders from a template, documents filed automatically, and deal stage stamped on SharePoint folder properties

CloudFiles is Document Automation for Salesforce. This guide describes a pattern we see among private equity firms and corporate deal teams: deal folders in SharePoint created from Salesforce, documents filed without manual sorting, and secure external file sharing for due diligence. CloudFiles connects SharePoint, AWS S3, Google Drive and Azure Blob; deal teams in this pattern usually work in SharePoint.

What problem do deal teams have with SharePoint deal folders?

A deal team tracks targets, sponsors, advisors and pipeline in Salesforce. The documents (teasers, NDAs, CIMs, models, IC memos, diligence reports) live in SharePoint. Every new deal means someone builds a folder tree by hand, copies it from the last deal, and pastes a link into Salesforce. Folders end up inconsistent. Documents arrive by email and sit in a shared inbox until someone files them. When a deal moves stages, nothing in SharePoint reflects it, so finding every deal in diligence means asking around.

Diligence adds another problem: outside parties need to see specific documents, under control, without being added to the firm's Microsoft tenant.

Which Salesforce objects are involved?

- **Opportunity** (or a custom Deal object): each deal gets its own SharePoint folder tree.
- **Account**: the target company, sponsor or portfolio company.
- **Contact**: advisors, lenders and counterparties who receive share links.
- **Custom objects**: the widget and Flow actions work on any standard or custom object, so a Fund or Portfolio Company record can have folders too.

How do we create deal folders in SharePoint from Salesforce?

To create deal folders in SharePoint from Salesforce and automate SharePoint folder creation from Opportunities, an admin builds a record-triggered Flow with CloudFiles Flow actions:

1. **Deal created.** When an Opportunity or Deal record is created, the Flow calls **Create Folder** in the deals library, named from the deal code and linked to the record.

2. **Template applied. Copy Resources** copies the firm's template folder tree (for example Sourcing, NDA, CIM, Model, Diligence, IC, Closing) into the new deal folder, so every deal starts with the same structure.
3. **Deal team access. Update Permissions** grants the deal team write access by Salesforce user or group.
4. **Drop-off filing.** Documents saved to a drop-off folder are filed into the right subfolder by a Flow that calls **Move Resource**.

Asynchronous actions return nothing and report completion later as a CloudFiles event, which a record-triggered or platform-event Flow handles. The View Metadata dialog in the CloudFiles Content Library lists the Site Id, Drive Id and Folder Id each action needs, with copy buttons.

How do we set SharePoint folder properties from deal stage?

To set SharePoint folder properties from deal stage, a Flow runs whenever the Opportunity stage changes. It calls **Update Drive Columns** to write the stage, deal type, sector and expected close date onto the deal folder's SharePoint columns. **Set Resource Property** can store additional values on the folder, and **Search by Resource Metadata** lets a Flow find folders by those values later.

The result: someone working in SharePoint can filter the deals library to every deal in diligence, and the view matches Salesforce because Salesforce wrote it. Metadata goes from Salesforce to SharePoint by Flow.

The same stage Flow can change access. Moving to IC might grant read access to the investment committee group through **Create SharePoint Site Group** and **Update SharePoint Site Group Members**. Closed Lost might revoke write access and move the folder to an archive with **Move Resource**.

How does secure external file sharing for due diligence work?

For secure external file sharing for due diligence, **Create Link** produces a share link to a folder or file, and **Update Link Settings** changes it later. Each link can carry:

- an email wall, a password, an email verification code and a consent step,
- an expiry date and a view limit,
- tracking of every view with location, and every download per file,
- white-label branding and a custom domain.

External advisors and bidders never need SharePoint access or an account in the firm's tenant. When a process ends, a Flow on stage change can update link settings to close access.

Counterparties can also upload into the deal's SharePoint folder through an Experience Cloud portal, using **Share with Community User**, without having a SharePoint account and without being held to Salesforce's own file size limits for portal uploads.

What does the deal team see in Salesforce?

The CloudFiles file browser widget on the Opportunity record page shows the deal's SharePoint folder tree. The team previews CIMs, models and memos, searches across the whole tree and uploads without leaving Salesforce. Download as PDF and print from preview (when an admin enables it) are there for IC packs.

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

Who controls access?

Flow automation runs as a service principal or integration user; the widget runs as each user through their own storage connection. The SharePoint service principal 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, granting access site by site. Deal folder and site-group access stays in step with Salesforce owners, teams and stage.

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.

ISO certificates, the SOC 2 Type II report and a penetration test summary 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.