



SHAREPOINT TO **SALESFORCE** INTEGRATION USER GUIDE

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Purpose

- This document will guide users in utilizing the newly developed Salesforce-to-SharePoint integration. The primary goal of this integration is to provide a seamless, efficient, and user-friendly experience for managing documents within the Salesforce environment. By leveraging SharePoint as the document storage backend, the system ensures that no additional file storage is consumed within the Salesforce platform. This approach optimizes storage costs and delivers a faster and load-free interface, allowing users to access, upload, and manage documents without impacting Salesforce performance.

Overview of Integration

- The Salesforce to SharePoint integration is designed to streamline document management by bridging the gap between two powerful platforms—Salesforce and Microsoft SharePoint. With this integration, users can directly access, upload, and manage documents stored in SharePoint without leaving the Salesforce interface.
- This functionality is embedded within specific Salesforce records (such as Accounts, Opportunities, or Cases), allowing users to associate documents with relevant data seamlessly. The integration ensures that all files are stored externally in SharePoint, significantly reducing storage usage within Salesforce and maintaining optimal system performance.

Key features include:

- Uploading documents to SharePoint from within Salesforce
- Viewing documents directly from Salesforce
- Organizing documents in SharePoint folders linked to Salesforce records
- Enhanced security and access control via SharePoint permissions

This integration enables a smooth, centralized workflow where users can manage documents more efficiently while ensuring data remains secure, organized, and easily accessible.

Accessing the Integration Functionality

- To add a component to your Org, go to the record and click on the edit page. Please reference the screenshot below:

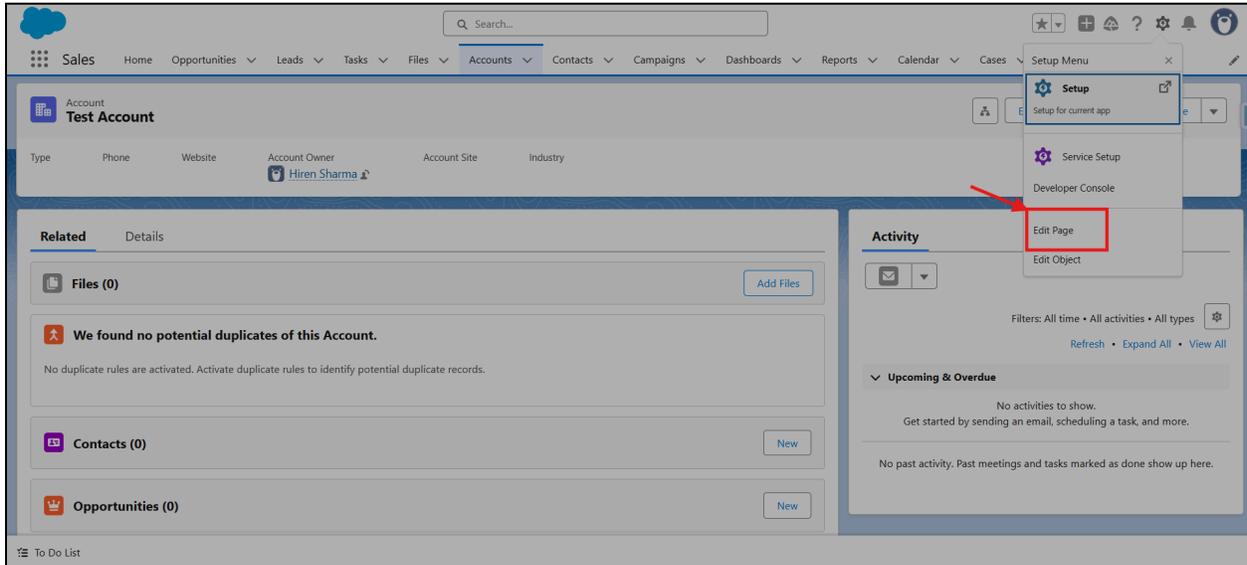


Fig.No.1 Salesforce to SharePoint integration Component

- In the left-hand corner, you will see a custom component called “SharePoint Integration.” Simply drag and drop this component onto the Related Tab, as shown in the screenshot below for reference.

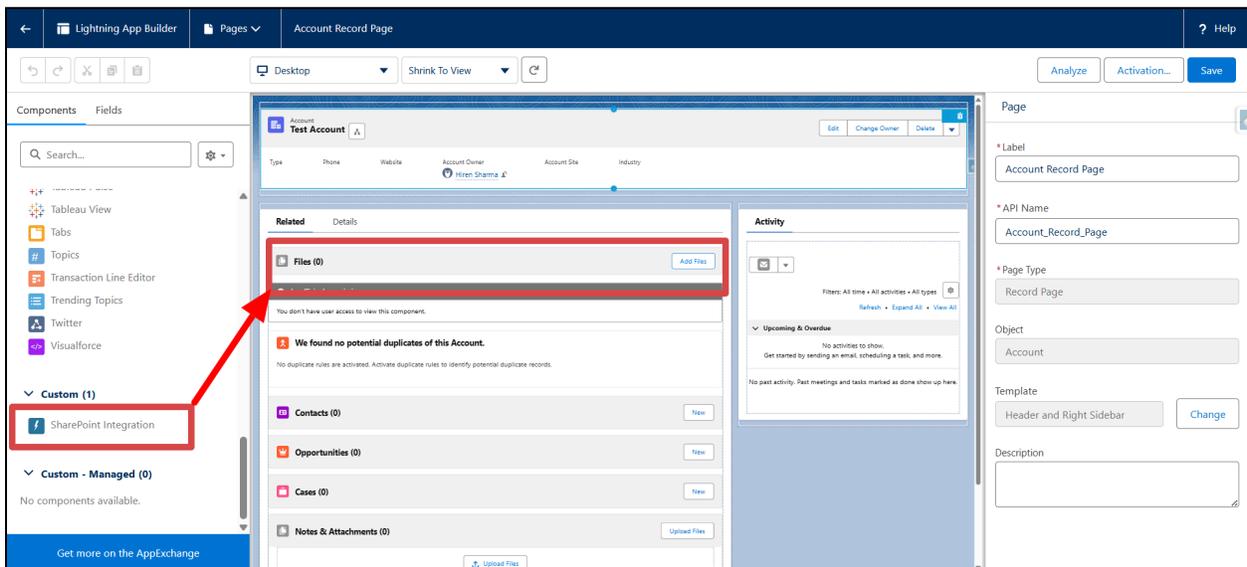


Fig.No.2: Salesforce to SharePoint Component Edit Page

- The integration is designed to work with any object in Salesforce. For demonstration purposes, we've added it to the **Account** object.

To try it out:

1. Go to the **Account** tab in Salesforce.
2. Create a new Account record (e.g., name it "**Test Account**" for testing).
3. Once the record is created, scroll to the **Related** tab.
4. In the **Files** section, you will find the SharePoint integration panel.
5. From here, you can start uploading and managing documents directly through SharePoint.

Refer to the screenshot for visual guidance on where to find the integration.

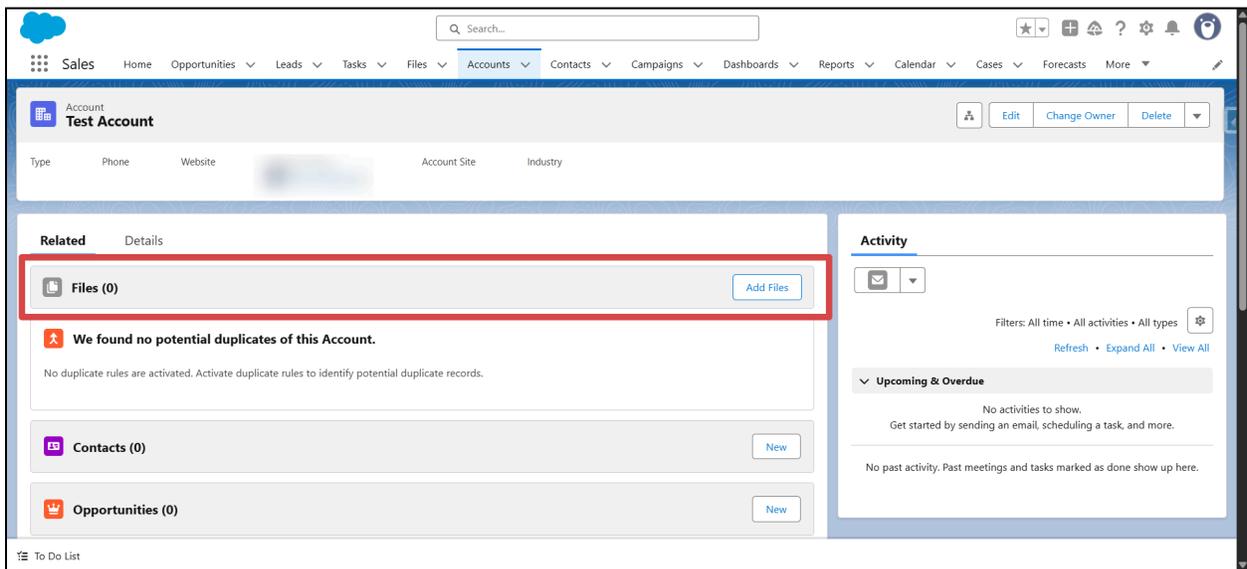


Fig.No.3: Upload the Document in Salesforce

- If a user wants to upload a file, they can do so by clicking on the **Add File** section. This will also allow them to browse and view all existing folders and files stored in Microsoft SharePoint.

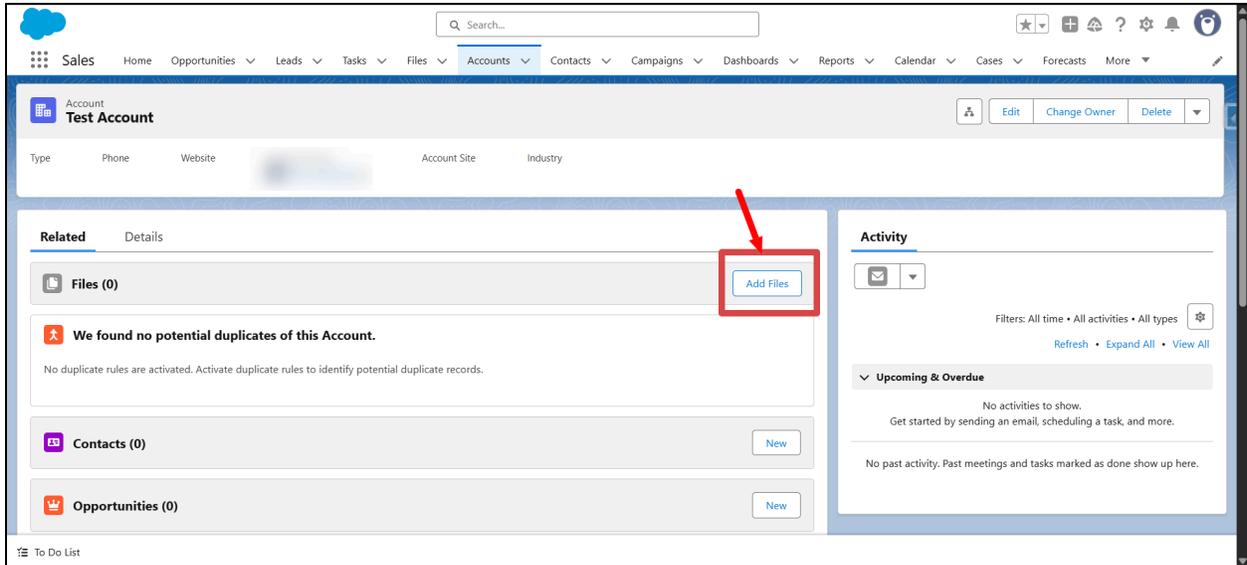


Fig.No.4: Add files in Salesforce from the record

- By selecting a specific folder, you can access the files present in SharePoint, allowing users to add files to that record.

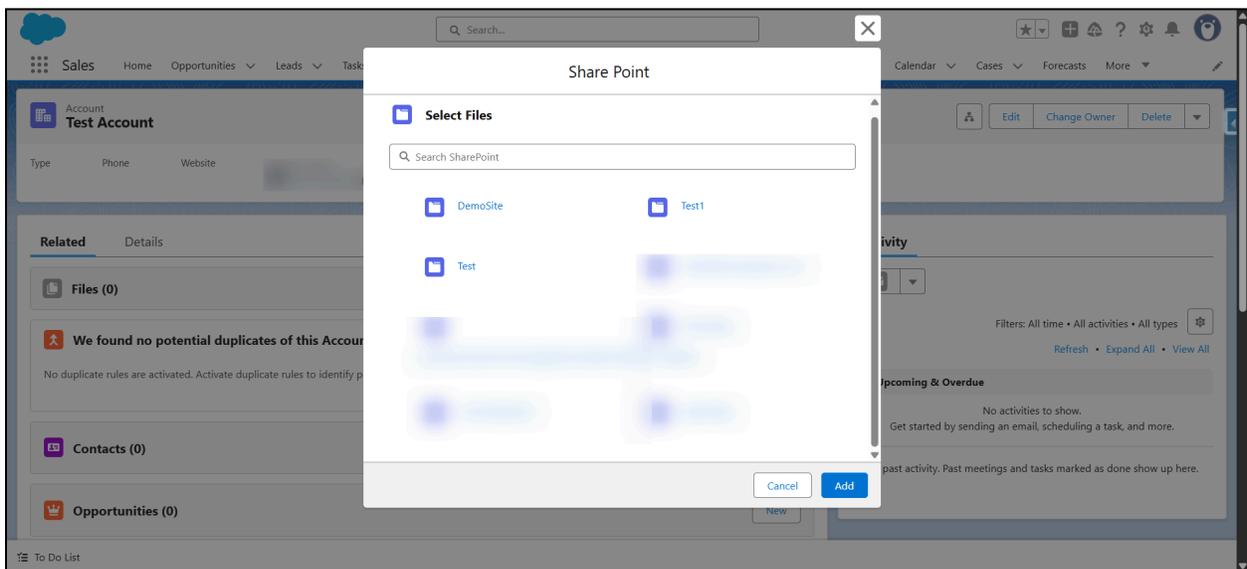


Fig.No.5 Add file from specific folder

- To add a specific file to a record, select the checkbox and click the add button shown in the screenshot.

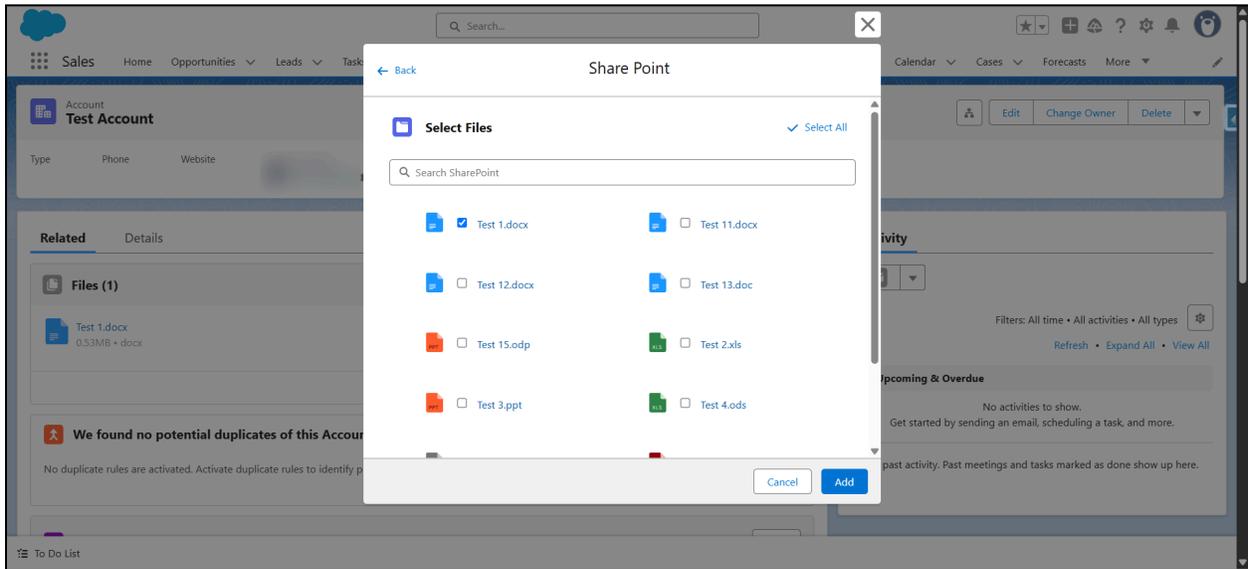


Fig.No.6: Select a file from a folder

- Once you upload a file, you will receive a notification confirming the successful upload. Please refer screenshot below.

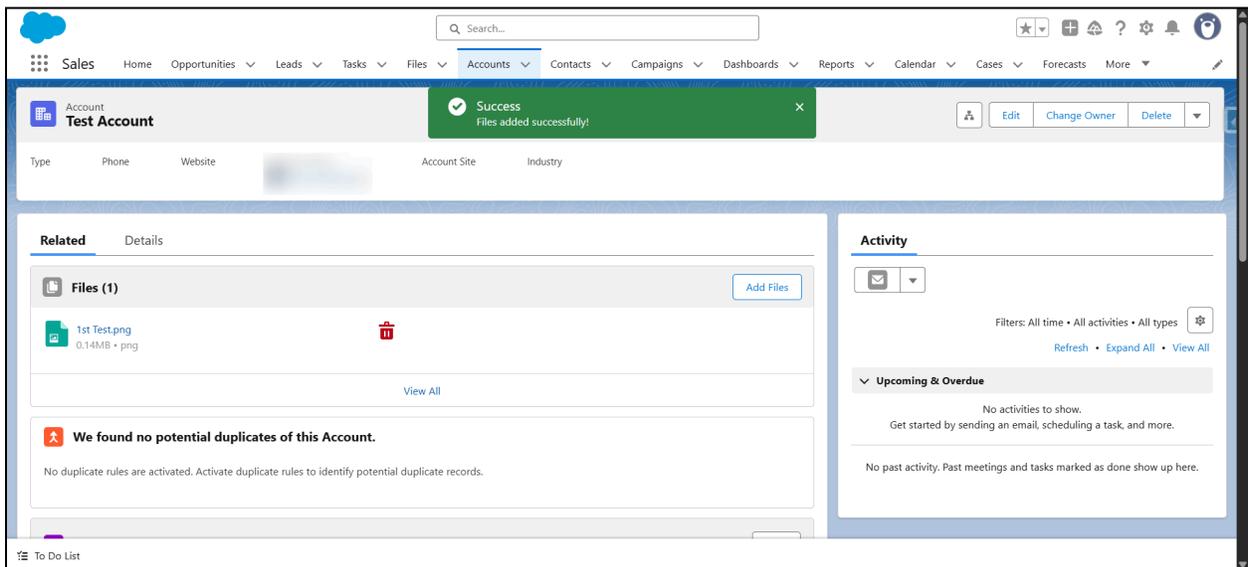


Fig.No.6 Successful File Upload

- If you click on the file, a preview will appear in a separate window, as shown in the screenshot below.

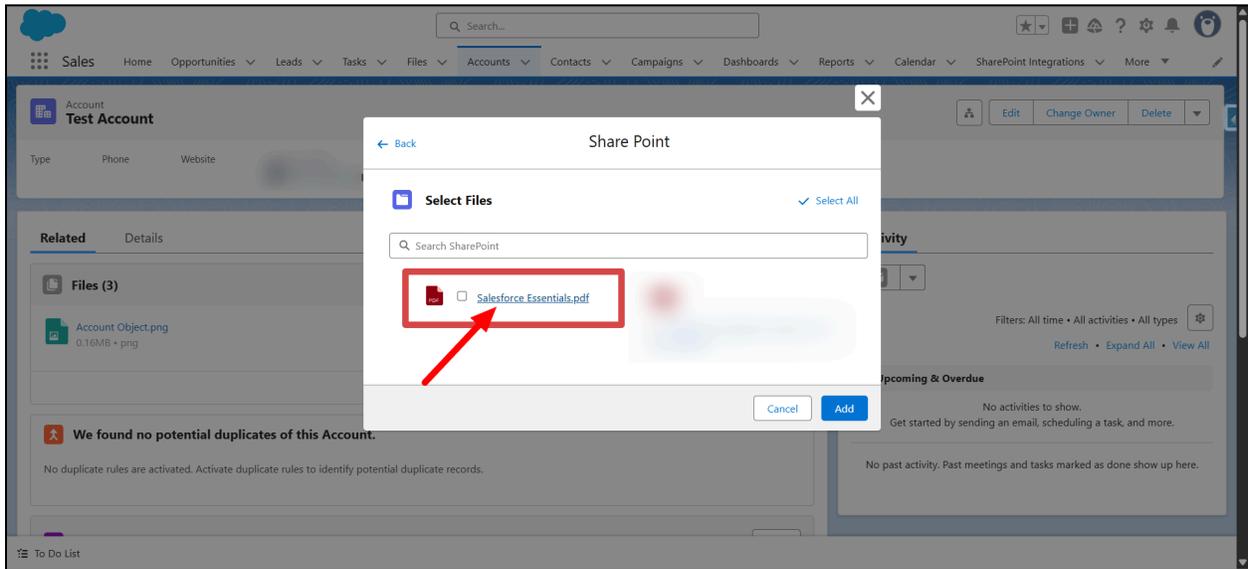


Fig.No.7 File Preview in Salesforce

- If you click on the file, a preview will open on a different page, as shown in the screenshot below.

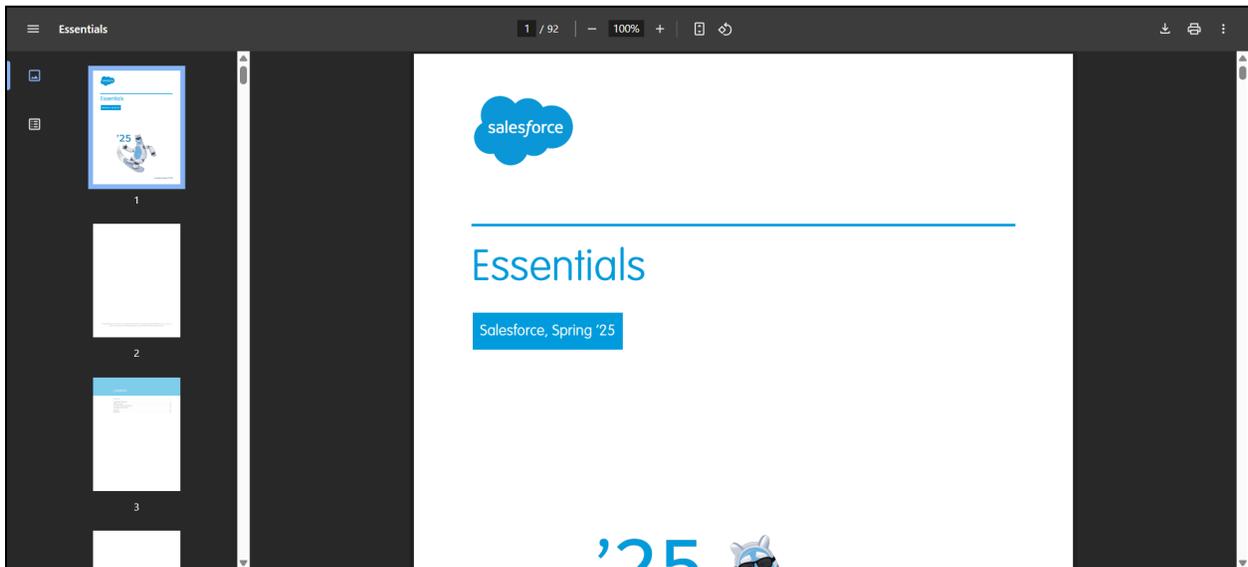


Fig.No.8 File Preview in New Tab in Browser

- If a user has more than 200 files, we have you covered. We've developed a "Load More" button that allows you to easily access all your files, bringing more than 200 files to your fingertips.

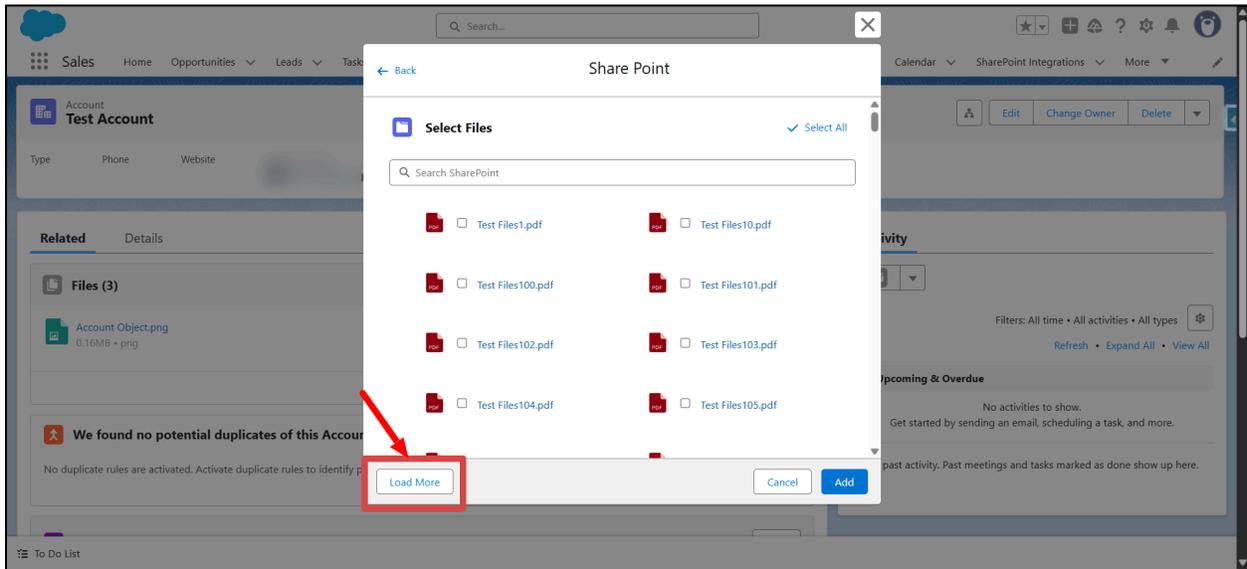


Fig.No.7 Load More Button

- If you're wondering how to select and upload all the files, especially if you've added more than 200 files, we have you covered! We've also created a "Select All" button that allows you to select multiple files at once and upload them simultaneously. We can also deselect according to our needs. Please see the screenshot below for reference.

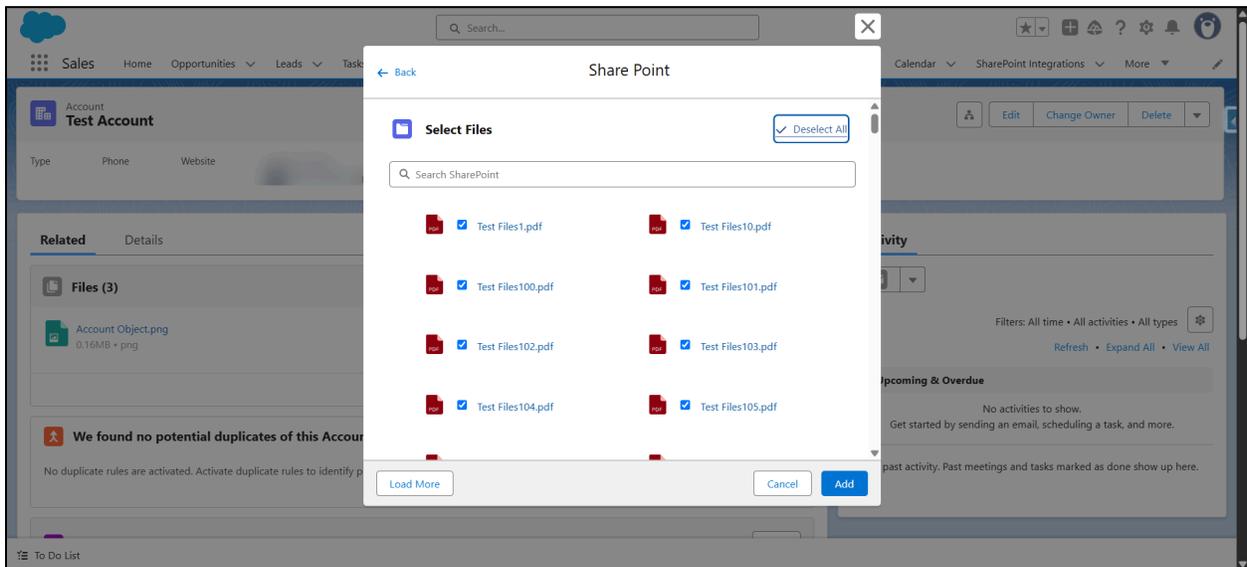


Fig.No.8 Select All Button

- So far, we have explored how to upload multiple files from SharePoint to Salesforce. However, we also need effective data management to ensure that if a file already exists in a particular Salesforce record, it cannot be uploaded again. If someone attempts to upload a duplicate file, a Warning message should be displayed stating that the file already exists in Salesforce.

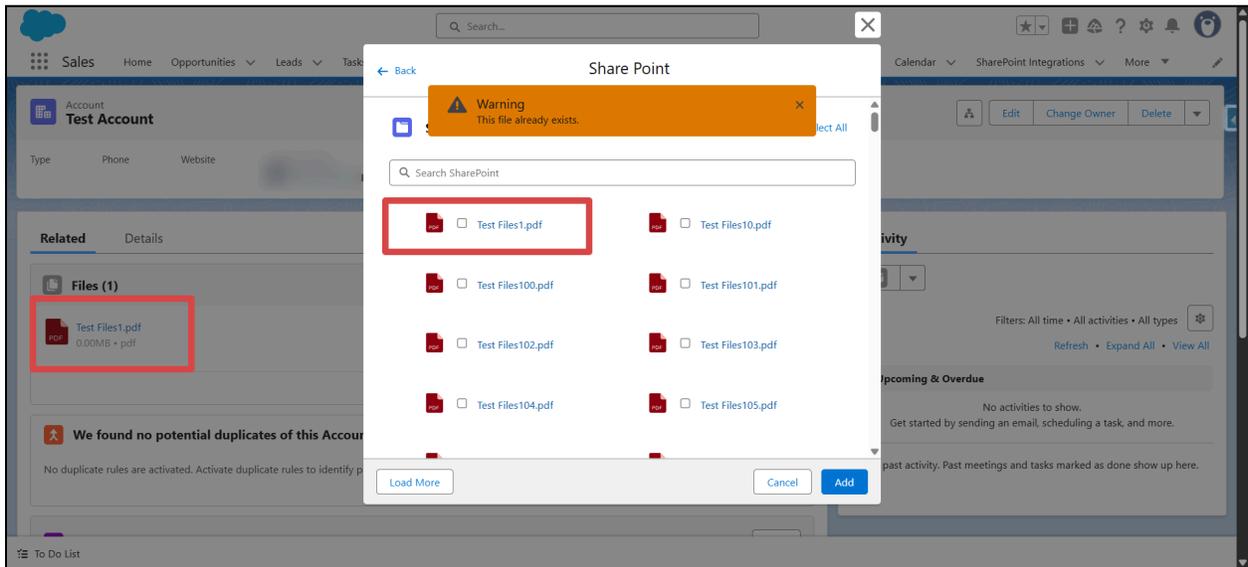


Fig.No.8 Warning for Duplicate file

- We have now added the file to Salesforce. If you want to delete a specific file, you can easily do so by clicking the delete button, as shown in the screenshot below:

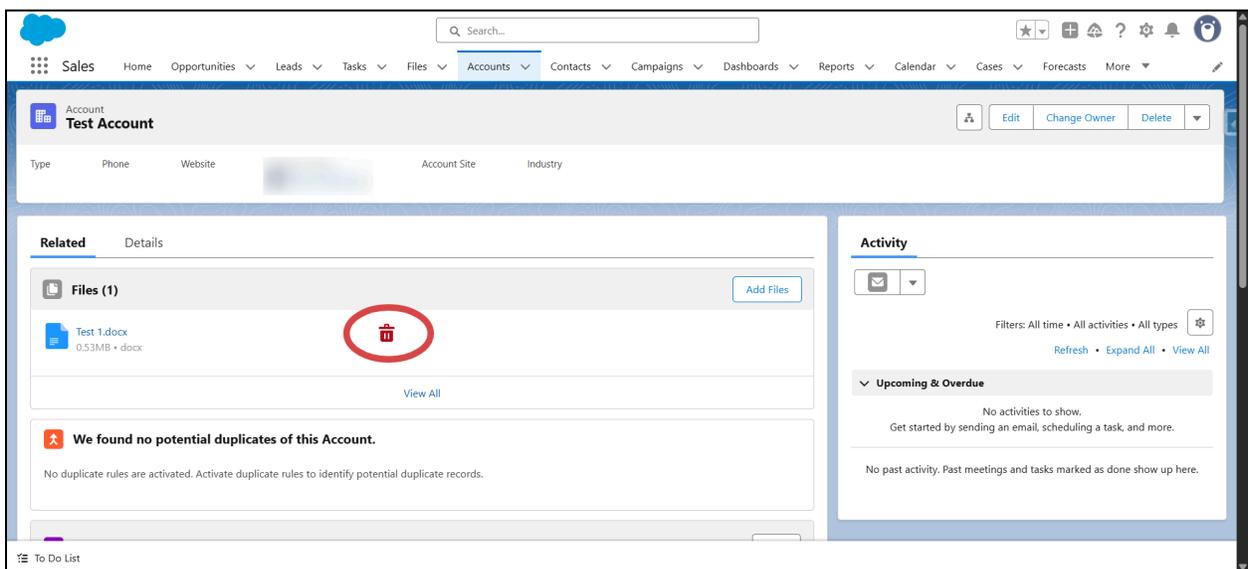


Fig.No.8: Delete File Navigation in Salesforce

- If you select a particular file you want to delete, a pop-up will appear asking if you are sure you want to delete the file, as shown in the screenshot below.

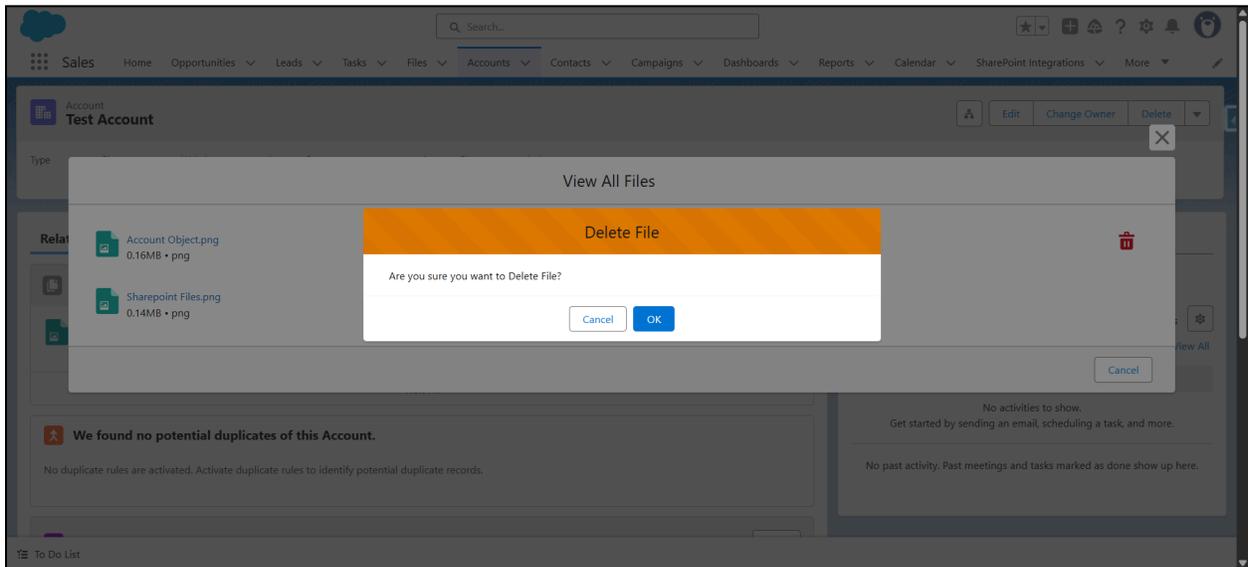


Fig.No.8 Delete Confirmation Pop-up Window

- If you click the ****Delete**** button, a confirmation message will appear, and the file will be removed from the file section as shown in the screenshot below.

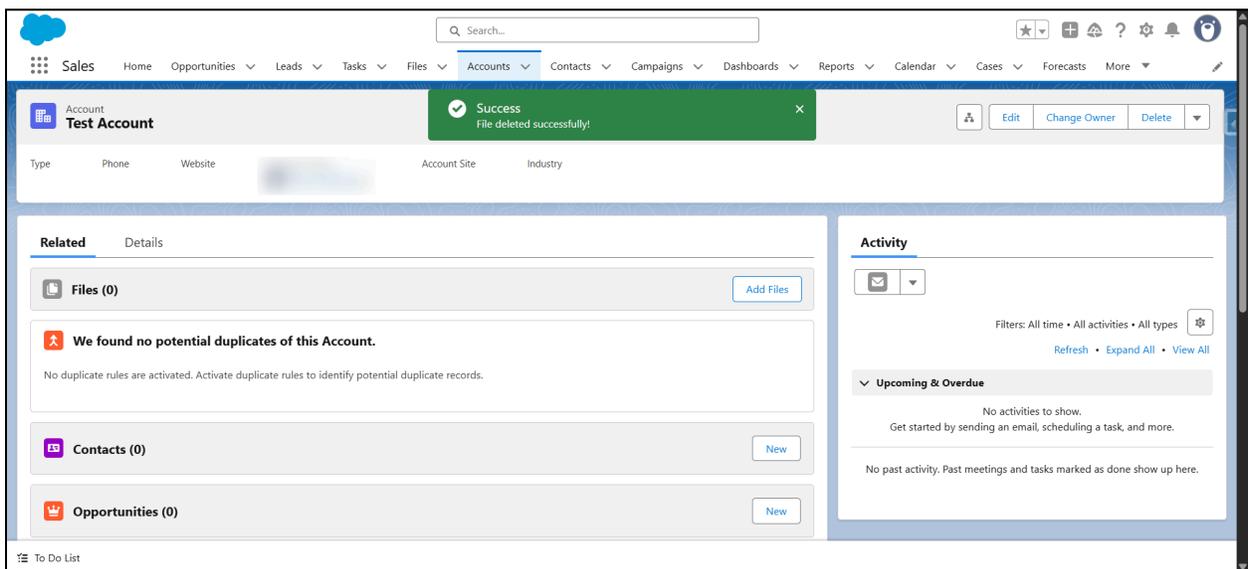


Fig.No.9 File Delete successfully from Salesforce

Key Benefits of the Integration

- **Reduced Salesforce Storage Usage**
Files are stored in SharePoint, not Salesforce, helping you avoid expensive storage limits.
- **Centralized Document Management**
Keeps all documents in one organized location (SharePoint), while making them easily accessible from Salesforce.
- **Faster Performance**
By offloading file storage and handling to SharePoint, Salesforce remains lightweight and responsive.
- **Improved Collaboration**
Teams can collaborate on documents in SharePoint (real-time editing, version control), even while accessing them through Salesforce.
- **Easy Access Across Systems**
Documents can be accessed from both platforms—Salesforce and SharePoint—ensuring flexibility for users in both environments.
- **Secure and Compliant**
Leverages SharePoint's robust security and permission controls, ensuring sensitive documents are protected.
- **Scalable for Future Needs**
The system can be applied across different Salesforce objects and scaled to accommodate more teams or use cases.
- **Familiar Interface for Users**
Users continue to use SharePoint's familiar document structure without needing to leave Salesforce.
- **Seamless User Experience**
The integration feels native within Salesforce, eliminating the need to switch tabs or platforms to manage documents.

Conclusion

The Salesforce to SharePoint integration delivers a powerful, seamless solution for managing documents within the Salesforce ecosystem while utilizing SharePoint's robust storage and collaboration capabilities. By enabling direct access to SharePoint from within Salesforce, users can efficiently upload, organize, and manage documents without consuming Salesforce storage or disrupting workflow. This integration not only enhances productivity and system performance but also ensures data security and scalability for future business needs. With its user-friendly interface and intuitive functionality, the integration represents a significant advancement in document management across platforms.