



case study

Enhancing Document Management with Microsoft SharePoint x Salesforce Integration

Industry: Cybersecurity

Solution: Microsoft SharePoint

Implementation x Salesforce Integration

Challenge

As the organisation expanded, document management became increasingly complex and inefficient. Files were stored across multiple systems and folders, with no unified structure or governance in place. Departments struggled to locate and manage critical documents, leading to wasted time, duplicated work, and version control issues. Additionally, there was no seamless link between Salesforce and document storage, causing disconnection between sales data and associated documentation.

Objectives

The primary objective was to implement a centralised, scalable document management solution that improved accessibility, organisation, and collaboration across departments. A secondary goal was to automate the creation and organisation of sales-related documents by integrating SharePoint with Salesforce—ensuring that every opportunity had a corresponding, properly structured folder for document storage.

Solutions

We implemented Microsoft SharePoint as the organisation's central document management and storage platform. A well-structured library system was designed with dedicated sections for each department, promoting clarity and consistent file organisation.

To enhance operational efficiency, we integrated Salesforce with SharePoint using Microsoft Power Automate. This automation ensured that whenever a new Opportunity was created in Salesforce, a corresponding folder was automatically generated in SharePoint, following a predefined naming convention. This reduced manual effort, improved document tracking, and ensured that all relevant sales documentation was stored in the correct location from the outset.

Results

- Improved document organisation and discoverability across departments
- Automated folder creation, saving time and eliminating manual setup errors
- Enhanced collaboration, with a centralised location for all documents tied to Salesforce opportunities
- Reduced time spent searching for files, resulting in increased productivity
- Stronger version control and governance, ensuring consistency and data integrity