

# Integrating SharePoint and Salesforce to Drive Business Productivity

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## Strategies for streamlining collaboration with SharePoint-Salesforce Integration

This document is intended to aid IT administrators and other stakeholders responsible for managing Microsoft® SharePoint® and Salesforce.com deployments, in planning and implementing a comprehensive, reliable, and efficient integration strategy appropriate to their organizational needs.

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Unleashing the Power of SharePoint™

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# Executive Summary

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To achieve optimal business productivity, organizations must continually work to break down the information “silos” that often form among business units. Such silos prevent knowledge workers across the enterprise from working together efficiently and sharing information. Often, different business units leverage different technologies, which are neither integrated nor able to communicate with each other. Until recently, organizations using both Microsoft SharePoint and Salesforce.com CRM faced such challenges, resulting in inefficient or duplicative processes, increased storage management and data recovery costs, and an inability to generate actionable intelligence for decision makers. Many companies do without the benefits of this integration, while others either attempt to solve it using manual, costly, and error-prone methods or build a highly customized solution that is not readily maintainable and lacks features necessary to effectively drive business productivity.

This, however, is no longer the case.

Companies using SharePoint as their information management platform and Salesforce.com as their customer relationship management (CRM) platform are now able to integrate and synchronize these two technologies in a variety of ways, in order to reach new levels of productivity.

In this document, we will briefly review how companies can take full advantage of their SharePoint and Salesforce.com investments by opening up the lines of communication and integration between the two platforms. We will identify some common challenges organizations face when using both platforms in the course of business, and review the methods and tools available to help them overcome these challenges while utilizing the best of both technologies’ unique capabilities.

This document is intended to aid sales and marketing operations staff, IT administrators, business process managers, and other stakeholders responsible for ensuring optimal productivity in planning and implementing a comprehensive, reliable, and efficient integration strategy appropriate to their organizational needs.

# Two Platforms, One Objective

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SharePoint and Salesforce CRM are two of the most popular business productivity tools in the world, and for good reason. If your organization is one of the thousands worldwide utilizing both platforms, there are powerful and creative ways you can integrate them, exchange information between them, and leverage the power of each to drive new efficiencies.

Put simply, organizations deploy platforms like SharePoint and Salesforce CRM to help them efficiently collaborate upon, deliver, store, manage, and analyze their enterprise data.

Both SharePoint and Salesforce.com, in their own ways, provide some of the functionality required to efficiently manage this productivity loop. But neither can deliver all the required functionality alone. So let's first briefly review the capabilities of each platform. Then, we'll identify the ways organizations can integrate the two platforms in order to enhance productivity, collaboration, delivery and, ultimately, the bottom line.

## Salesforce.com

Salesforce.com offers a cloud-based CRM platform used by more than 70,000 organizations globally to help manage their interactions with prospective and current customers, meeting via two core functions: (1) sales and service collateral delivery, and (2) sales and service activity collection. Salesforce.com delivers powerful functionality to the distributed workforce of sales and service organizations via its CRM applications – the Sales, Service, and Collaboration clouds – and the Force.com platform.

## Microsoft SharePoint

Microsoft SharePoint Products and Technologies consist of an integrated suite of server capabilities that help improve organizational effectiveness by providing comprehensive content management and enterprise search, accelerating shared business processes, and facilitating information-sharing across boundaries for better business insight. Fully integrated with the productivity tools knowledge workers use daily (including the Microsoft Office suite and Microsoft Outlook), imbedded with best-of-breed enterprise search capabilities, easily customizable and eminently scalable, SharePoint is considered by many experts to be the foundation for enterprise content platforms of the future, satisfying two key objectives: (1) collateral production and management, and (2) analyses and reporting.

# Integrating SharePoint and Salesforce.com for Success

To truly optimize productivity across the enterprise, it is vital that SharePoint and Salesforce.com platforms interact, communicate, and exchange information with each other. It is only with this integration that organizations can fully take advantage of the competencies of each platform.

To illustrate this point, let's review some examples of how an integrated SharePoint-Salesforce.com enterprise system can improve productivity and increase organizational efficiency.

<b>Business Case One</b>	<b>Author Enterprise Content in SharePoint, Deliver it to Your Team through Salesforce.com Content Libraries</b>
<b>Objective</b>	<ul style="list-style-type: none"> <li>You manage a global organization that provides software and services to retail businesses worldwide.</li> <li>The product marketing department wants to create product brochures and other assets for the geo-distributed sales workforce to use as sales enablement materials.</li> <li>The process must utilize all architects, developers, and technical writers necessary for the task.</li> </ul>
<b>Challenges</b>	<ul style="list-style-type: none"> <li>There is no way natively – from either Microsoft or Salesforce.com – to effectively move content between the two platforms.</li> <li>It is highly unproductive to have sales people switching from Salesforce to SharePoint to find and deliver assets to their prospects</li> <li>Using the file system is inefficient for this process, as it does not facilitate organized content management, or remove the need to manually upload content to Salesforce.com once ready for distribution to the sales team(s).</li> </ul>
<b>Solution</b>	<ol style="list-style-type: none"> <li>The documents are authored and stewarded within SharePoint, taking advantage of its collaboration, change management, workflow, and versioning capabilities.</li> <li>Once the collateral is finalized and approved by all stakeholders, use <b>DocAve Content Replicator for Salesforce</b> to replicate the content into Salesforce.com's Content Library, (which acts much like a SharePoint Document Library.)</li> <li>Once in Salesforce.com's Content Library, execute and upload the collateral to publish it within Salesforce.com for use by sales representatives.</li> <li>Sales representatives will go out and contact prospective and current clients on the new products, use the collateral provided to serve as additional information, and track their progress – including items such as specific opportunities, contact information, won/lost, and assets – as Objects within Salesforce.com.</li> <li>All content in SharePoint continues to be managed, edited, updated, and modified by the content team using the established processes and benefits of SharePoint. On a pre-defined schedule, or in real-time (event-driven), the updated content is automatically synchronized to Salesforce.com, ensuring all sales enablement collateral is fully up-to-date.</li> </ol>

<p><b>Business Case Two</b></p>	<p><b>Aggregate Customer Feedback in Salesforce.com, Integrate and Analyze it in SharePoint</b></p>
<p><b>Objective</b></p>	<ul style="list-style-type: none"> <li>• Your organization’s customers have been submitting feedback in the form of service tickets, tweets, messages in community forums, and calls into the company’s customer service contact center, all of which is stored in the Service Cloud.</li> <li>• The product marketing team wants to take a look at all of the incoming data – in real-time – to gauge customer sentiment on a per product basis, and position potential customer feedback accordingly.</li> <li>• Mind you, your product marketing employees do not have Salesforce.com licenses and, more importantly, they need to integrate the feedback data with the customer assets data in the accounting system already available in SharePoint – so the data in Salesforce must be ported over to SharePoint.</li> <li>• From there, the product marketing team can view the data, analyze it, determine the customers that own various products, work within SharePoint to revise customer-facing material, then distribute efficiently to sales and service staff via Salesforce.</li> </ul>
<p><b>Challenges</b></p>	<ul style="list-style-type: none"> <li>• There is no way to natively move content and data effectively across the SharePoint and Salesforce.com platforms.</li> <li>• Various teams in the company need to be able to integrate and analyze data from multiple different, disparate data sources, including both structured and unstructured data.</li> </ul>
<p><b>Solution</b></p>	<ol style="list-style-type: none"> <li>1. All the customer feedback data, (saved as ‘Objects’ within Salesforce.com), must be transferred to SharePoint – use <b>DocAve Data Replicator for Salesforce</b> to move the data to SharePoint so the associated stakeholders can then review and analyze the data.</li> <li>2. Product marketing, technical writing, and legal teams analyze the data via SharePoint (leveraging SharePoint’s Business Intelligence functionality).</li> <li>3. These teams then collaborate within SharePoint to author and/or revise any customer-facing collateral based upon their analysis.</li> <li>4. Once finalized and approved by all stakeholders via SharePoint workflow, the finalized piece of collateral is then replicated into the Salesforce Content Library with <b>DocAve Content Replicator for Salesforce</b>.</li> <li>5. Within Salesforce, the collateral is then uploaded into Sales Cloud and Service Cloud for use by sales and customer service representatives. Sales decides to issue it as collateral, while customer service decides to either include it as a knowledge base article or send directly to impacted customers.</li> <li>6. <b>DocAve Data Replicator for Salesforce</b> will then automate the replication of resulting customer response data as soon as it is entered as Objects within Sales Cloud, and forum threads for the knowledge article are updated within the Service Cloud, enabling SharePoint stakeholders to monitor the reaction and adjust accordingly.</li> </ol>

<p><b>Business Case Three</b></p>	<p><b>Flexibly Backup Salesforce.com Data to On-Premises Storage for Swift, Lossless Restores</b></p>
<p><b>Objective</b></p>	<ul style="list-style-type: none"> <li>Your organization’s IT administrators want to ensure the same level of data recoverability for Salesforce.com content as it enjoys with its other enterprise content.</li> <li>They desire the ability to perform on-premise backups and swift, full fidelity, item-level restores of their Salesforce.com data.</li> </ul>
<p><b>Challenges</b></p>	<ul style="list-style-type: none"> <li>Natively, Salesforce.com provides automatic nightly backup of the Salesforce.com instance, with bi-monthly updates offsite to its own servers, making swift recovery of data difficult and cumbersome.</li> <li>Salesforce.com’s protocols address data restoration from a “catastrophic recovery” perspective only, meaning that to restore a single-item, all content must be re-written. This limits the organization should it only want to restore a few custom objects or accounts following an accidental deletion.</li> <li>Restoring Salesforce.com data from the previous day’s backup will overwrite all deltas performed since the last backup. This is not a satisfactory process for an organization that actively uses Salesforce on a daily basis.</li> <li>The IT administrator is unable, natively, to efficiently move data from one Salesforce.com instance to another (e.g. a development sandbox).</li> </ul>
<p><b>Solution</b></p>	<p><i>To backup Salesforce.com content:</i></p> <ol style="list-style-type: none"> <li>Determine how often backups should be performed on Salesforce.com data, based upon the Service Levels expected from the platform’s end-users. If discrete datasets require more aggressive backup schedules than others (based upon its business-importance, modification frequency, or otherwise), identify these datasets and determine the appropriate backup frequency.</li> <li>Use <b>DocAve Backup and Restore for Salesforce</b> to schedule any number of backup plans, based upon the datasets identified in the previous step. During this backup plan building process, leverage DocAve’s ability to perform full, incremental, or differential backups.</li> <li>Identify the on-premise storage resources backup data should be delivered to.</li> <li><b>DocAve Backup and Restore for Salesforce</b> will execute the prescribed, discrete backups, notifying administrators if any errors occurred during the process.</li> </ol> <p><i>For restoration:</i></p> <ol style="list-style-type: none"> <li>In the <b>DocAve Backup and Restore for Salesforce</b> interface, select the “Restore” option.</li> <li>Via the graphical restore controller, select the Salesforce.com records you would like to restore with a click of the mouse.</li> <li>Choose restore type – “in place” or “out of place” (i.e. to another Salesforce.com instance).</li> <li>Decide whether or not to overwrite the existing record.</li> <li>Restore the content instantly, or schedule the restoration for a later time/date.</li> </ol>

# DocAve for Salesforce – The Industry’s Leading SharePoint-Salesforce.com Integration Toolset

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With three independently deployable modules, all piloted via a single, browser-based interface, **DocAve for Salesforce** provides the tools organizations need to ensure seamless interactivity and communication between their SharePoint and Salesforce.com deployments.

**DocAve Content Replicator for Salesforce** offers automated integration of Salesforce Content Libraries with SharePoint Document Libraries, enabling:

- One-way synchronization of SharePoint with Salesforce Content Libraries, so stakeholders enterprise-wide have access to the most up-to-date data;
- Publication of Salesforce.com-stored documents via SharePoint for fully integrated, enterprise-wide information management;
- Flexible version and metadata filters, enabling seamless assimilation of Salesforce content into SharePoint workflows so that SharePoint’s document management prowess can improve organizational business processes; and
- Lose nothing in translation, as full metadata and securities mapping enables complete integration with Microsoft Active Directory (AD) and delivery of all AD permissions to Salesforce (as discrete metadata).

**DocAve Data Replicator for Salesforce** allows for the seamless, real-time transfer of Salesforce CRM data to SharePoint, enabling:

- One-way replication of Salesforce CRM data to SharePoint lists, so that mission-critical business information is always seen by all stakeholders in its most recent version;
- Full integration with PerformancePoint functionality, so Salesforce CRM data can be subject to the same powerful business intelligence and enterprise analytics tools SharePoint offers; and
- Flexible scheduling of full, incremental, or differential replication of Salesforce CRM data, ensuring the most valuable data is available as business demands.

**DocAve Backup and Restore for Salesforce** provides full-fidelity terrestrial backup and swift, item-level recovery of Salesforce CRM data, enabling:

- Localized Salesforce.com protection, by backing up Salesforce CRM data to on-premises terrestrial file stores for swift, lossless recovery following accidental deletion;
- Flexible – full and incremental – backup scheduling, enabling organizations to protect Salesforce CRM data as business demands, without overburdening storage resources;
- Item-level restore back to the Salesforce CRM cloud, or to any network-addressable or cloud location, ensuring zero data and productivity loss; and



- Granular, selective backup of Salesforce accounts, contacts, custom objects, or any other items to save precious storage resources and protect data according to business criticality.

**To learn more about how DocAve for Salesforce can streamline business processes and optimize productivity, please visit the AvePoint website at: [www.avepoint.com](http://www.avepoint.com)**

**To download a free, fully enabled 30-Day trial of the DocAve for Salesforce platform, please visit: <http://www.avepoint.com/resources/atlas-free-trial-downloads/>**

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