

# TITAN Experience Studio

Salesforce First portals and web experiences for every industry and workflow

## Product Overview

TITAN Experience Studio is the Salesforce First way to build secure, branded portals and web experiences on top of Salesforce data.

It includes the full experience layer you need to run a portal from end-to-end, including **pages, forms, and workflow orchestration**. Capture data through forms, guide users through flows, and keep every interaction synced to Salesforce records in real time.

## The Problem

Organizations keep trying to deliver self-service, but the portal layer breaks down in predictable ways.

### Experience Gaps And Low Adoption

- Portals feel disconnected from the brand and customer journey
- Mobile experiences are an afterthought, leading to drop-off
- Users can't easily find status, next steps, or "my records"

### Data Lives In The Wrong Place

- Portal tools store data outside your systems of record
- Sync introduces delays, duplication, and troubleshooting overhead
- Teams lose confidence in what's current and what's accurate

### Builds And Changes Take Too Long

- Portal projects turn into IT backlogs
- Small changes require developers, tickets, and release cycles
- Teams ship fewer improvements because iteration is expensive

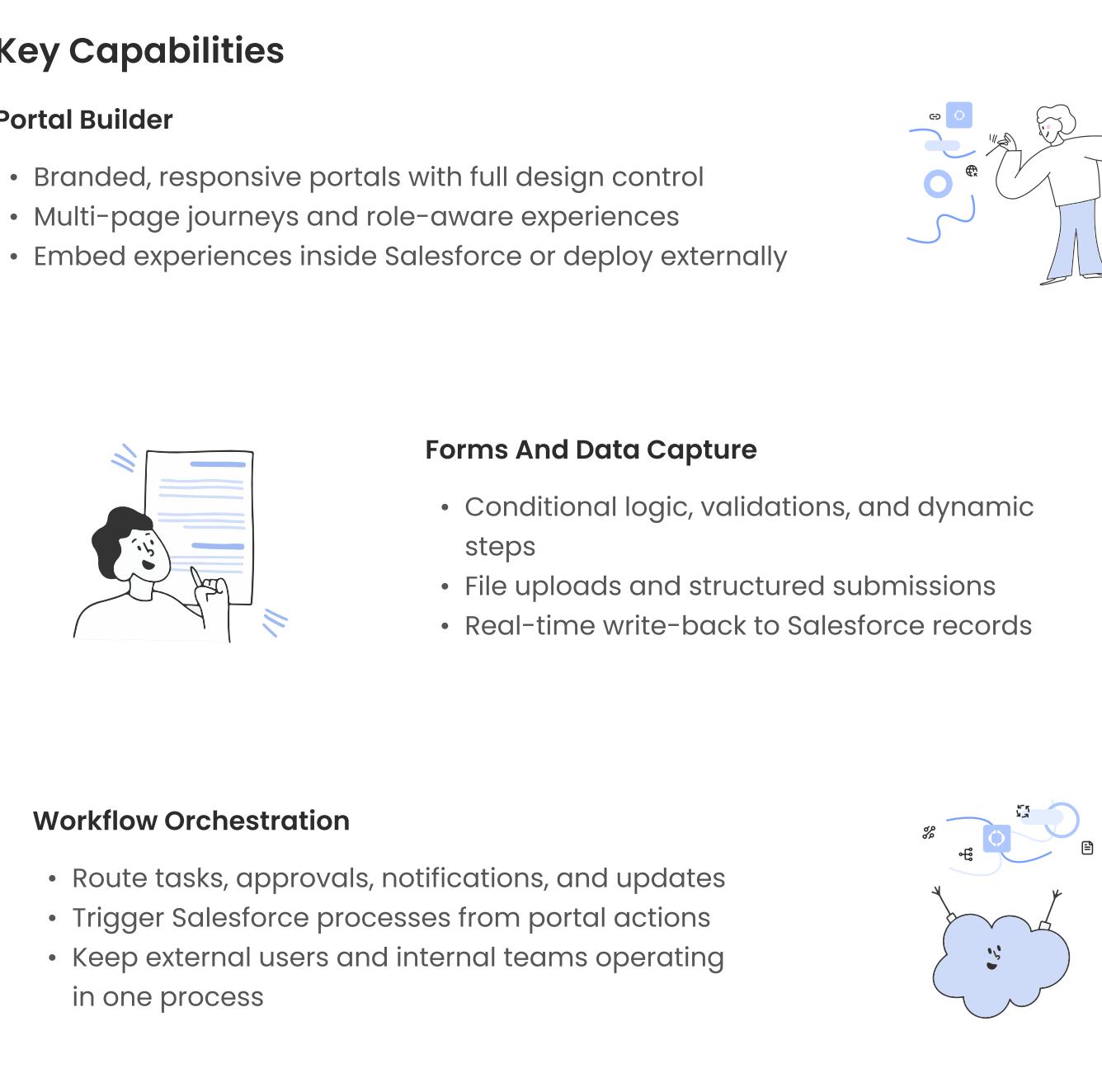
### Security And Governance Friction

- Access control is hard to align with Salesforce roles and data policies
- Audits and traceability get messy when the portal layer is separate
- Teams compromise on user experience to stay compliant



## Titan's Salesforce-Centric Solution

**Titan's Experience Studio** enables you to build branded, authenticated portals with embedded forms and guided flows that seamlessly sync with Salesforce in real time. It can also be embedded into your existing website using embedded forms or an iFrame, so users always know their status and next steps, while your team retains control, governance, and data integrity within Salesforce.



## How It Works

### 1. Design a Pixel-Perfect Portal Experience

Build fully branded, responsive pages with precise layout control, and use Titan Genie to speed up form creation and mapping.



### 2. Authenticate Users and Control Access

Secure access with SmartV capabilities, including role-based entry, permission-aware experiences, and controlled visibility so the right users see the right records, actions, and pages.

#### Smart Validation

#### Set Conditions

1 STEP 1 Login    2 STEP 2 Condition    3 STEP 3 Authentication



### 3. Capture Data with Forms

Embed logic-driven forms to collect updates, uploads, requests, and submissions, and write them into the right Salesforce records instantly.



### 4. Orchestrate the Journey with Flows

Turn steps into an end-to-end process with routing, approvals, conditional paths, and automation that runs after each user action.

### Cost Consolidation

- Replace disconnected portal tools and sync layers with one Salesforce-centered experience layer
- Reduce maintenance overhead by eliminating duplicate data stores



### 5. Operate with Dashboards and Role-Based Views

Use dashboards for both admins and users, with separate views for progress and outcomes. Control who can access specific portal elements, reports, and dashboards so each audience sees only what's relevant.

## Key Capabilities

### Portal Builder

- Branded, responsive portals with full design control
- Multi-page journeys and role-aware experiences
- Embed experiences inside Salesforce or deploy externally



### Forms And Data Capture

- Conditional logic, validations, and dynamic steps
- File uploads and structured submissions
- Real-time write-back to Salesforce records



### Workflow Orchestration

- Route tasks, approvals, notifications, and updates
- Trigger Salesforce processes from portal actions
- Keep external users and internal teams operating in one process

### Cost Consolidation

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- Reduce maintenance overhead by eliminating duplicate data stores



### Security & Compliance

- Access control aligned to Salesforce governance and permissions
- Auditability through Salesforce record updates and traceable user actions
- Data stays in Salesforce, not in an external database



### Popular Use Cases

- Customer portals for onboarding, service requests, and document collection
- Partner portals for deal registration, referrals, and co-selling workflows
- Employee portals for HR requests and internal services
- Student portals for enrollment flows and service requests, requiring traceability and access control



### Why Titan

#### Unlike Portal Tools That Create A Duplicate Database:

- Titan Keeps **Portal Data in Salesforce**
- Titan Combines **Pages, Forms, And Flows**
- Titan Enables **Real-Time Status And Next Steps**
- Titan Supports **Fast Iteration Without Rebuilds**



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