



TITAN Flow for SharePoint

Connect Microsoft SharePoint to every Salesforce process, portal, and document workflow, without breaking governance.

Product Overview

TITAN Flow connects SharePoint to Salesforce so files can move automatically between the systems your business already runs on.

Upload documents to the right SharePoint site, library, and folder from any Salesforce action, Titan portal, or document workflow, then keep Salesforce updated with the correct SharePoint link and identifiers.

The Problem

Cost-Driven Storage Reality

- Teams use SharePoint because it's a practical, cost-effective place to store and manage files at scale.
- Alternative storage options get expensive fast as volume grows.
- Salesforce is where the process and record governance live, but it's not where teams want to store every file long-term.

The Microsoft Garden

- SharePoint is where files belong, but it often sits behind separate access, structure, and process.
- The Salesforce to SharePoint connection is often unreliable or painful to maintain.
- Teams resort to workarounds, like storing files in Salesforce or pushing them into other storage systems.
- The result is a SharePoint environment that stays disconnected from Salesforce workflows.

Salesforce Storage And Performance Drag

- File storage grows quickly and drives cost.
- Large attachments add overhead, especially in record-heavy orgs.
- Duplicated files and inconsistent linking create clutter and confusion.

Workflow Breaks And Lost Traceability

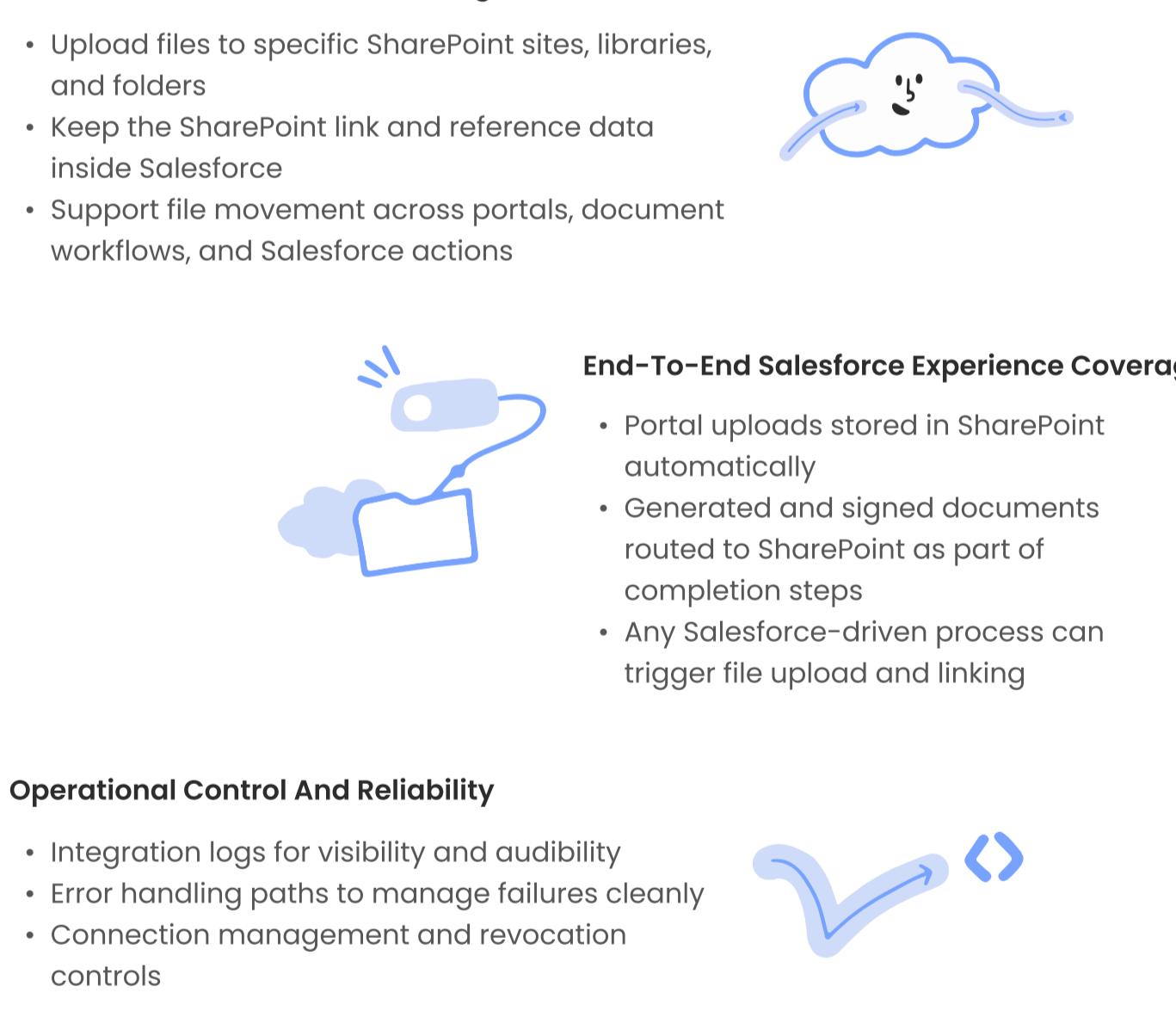
- Teams jump between platforms to upload, share, and confirm.
- Links are pasted manually or not captured at all.
- Automation stops at the most important step, when a document needs to be stored, shared, and tracked.



Titan's Unified Solution

TITAN Flow turns SharePoint into a seamless destination for files across the Salesforce experience.

Whether a file is generated, signed, uploaded through a portal, or attached through a Salesforce action, Titan routes it into SharePoint automatically and writes the SharePoint link back into Salesforce so the process stays continuous, trackable, and governed. For advanced Microsoft environments or multi-system processes, Titan's API Hub extends the same approach, enabling secure REST connections for deeper SharePoint automation and integration with additional platforms.



How It Works

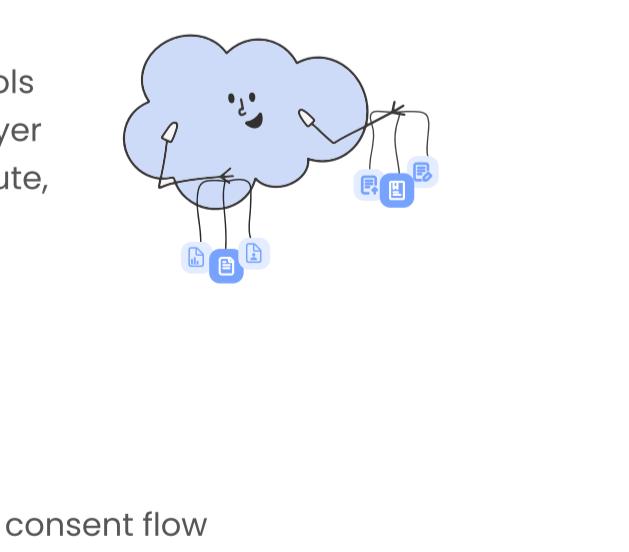
1. Connect SharePoint Once

Authenticate with Microsoft and manage access centrally with revocable control.



2. Trigger from Anywhere in the Salesforce Experience

Start the Flow from any Salesforce action or Titan experience, including a Titan button, an embedded page in Salesforce, or a portal on your website and mobile.



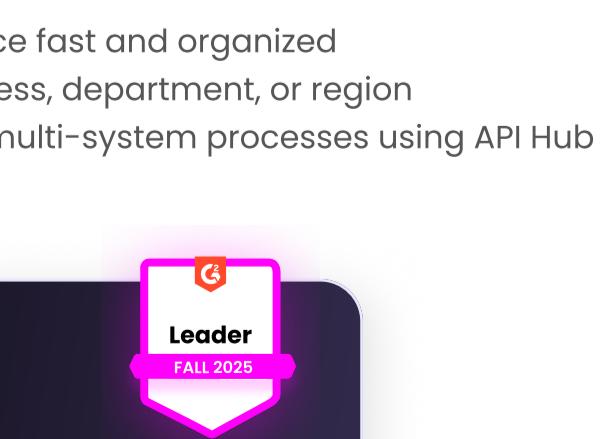
3. Route Files to the Right SharePoint Destination

Select the SharePoint site, library, and folder aligned to your governance model.



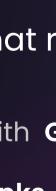
4. Capture SharePoint Outputs Automatically

Store returned SharePoint file links and IDs in variables to use throughout the process.



5. Close the Loop in Salesforce

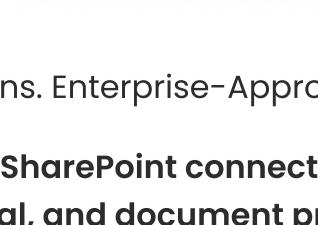
Update Salesforce with the SharePoint link and trigger downstream actions, alerts, approvals, and record updates.



Key Capabilities

SharePoint Connected File Routing

- Upload files to specific SharePoint sites, libraries, and folders.
- Keep the SharePoint link and reference data inside Salesforce.
- Support file movement across portals, document workflows, and Salesforce actions.



Operational Control And Reliability

- Integration logs for visibility and audibility.
- Error handling paths to manage failures cleanly.
- Connection management and revocation controls.

End-To-End Salesforce Experience Coverage

- Portal uploads stored in SharePoint automatically.
- Generated and signed documents routed to SharePoint as part of completion steps.
- Any Salesforce-driven process can trigger file upload and linking.



Cost Consolidation

- Replace point integrations and connector tools with one central solution.
- Reduce the need for multiple platforms to route, store, and track documents across systems.

Security & Compliance

- Microsoft authentication using OAuth-based consent flow.
- Short-lived access tokens generated as needed for secure record requests.
- Titan doesn't become another data system: your files and record data remain in Salesforce and SharePoint, and Titan does not store them.
- Revocable access and traceable integration activity through logs and controls.

Ideal Use Cases

- Route portal uploads into SharePoint and store the link on the Salesforce record.
- Automatically route generated contracts, proposals, and signed agreements to SharePoint.
- Offload large attachments to keep Salesforce fast and organized.
- Standardize file governance by object, process, department, or region.
- Connect Microsoft file handling to broader multi-system processes using API Hub.

Why Titan

Unlike point tools that require workarounds:

- Titan routes files with **Governed SharePoint Paths**.
- Titan writes back **links, IDs, and metadata**.
- Titan triggers from any **Salesforce or portal step**.
- Titan keeps data in **Salesforce and SharePoint only**.

1,000+ Organizations Enterprise-Approved

AppExchange-Loved (4.89/5)

TITAN Flow for SharePoint connects the Microsoft world to every Salesforce workflow, portal, and document process, keeping files governed in SharePoint and trackable in Salesforce.

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