

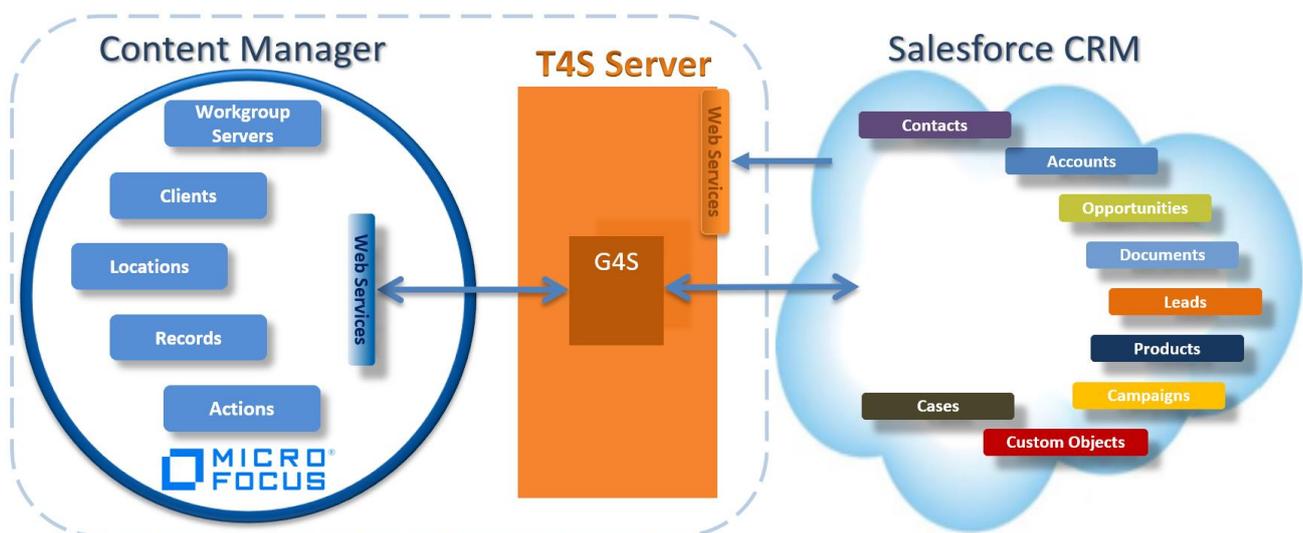
Salesforce to Content Manager

ONSHORE RECORD KEEPING FOR SALESFORCE.COM

The [T4S connector](#) adds record governance and data residency to Salesforce by integrating it with Micro Focus Content Manager (TRIM). The bidirectional real time integration allows users to intuitively work with TRIM documents from inside Salesforce. Document handling and governance features include:

- Onshore record retention solution
- Documents can reside only in TRIM (referenced in Salesforce).
- Documents can reside in both TRIM and Salesforce (configurable)
- TRIM document search and view from Salesforce
- Save, update, delete or download TRIM documents from Salesforce
- Upload documents from Salesforce to context aware containers in TRIM
- Save Salesforce records to TRIM as PDF documents
- Save Salesforce emails or email attachments to TRIM as documents
- Add direct links to TRIM documents in Salesforce
- Show documents in selected TRIM containers in Salesforce
- View all documents in a container from a predefined search
- Save Salesforce data exports to TRIM or a local server using scheduled tasks
- Control access with Salesforce roles and TRIM permissions
- Two-way SSL connection between Salesforce and the T4S server

T4S uses a Salesforce application and on-premise software hosted on a T4S server to ensure high document volumes can be passed between the two systems. Users in Salesforce request actions from the T4S server which calls the internal G4S component to pass information between the Salesforce Partner API and standard TRIM REST Web Services.



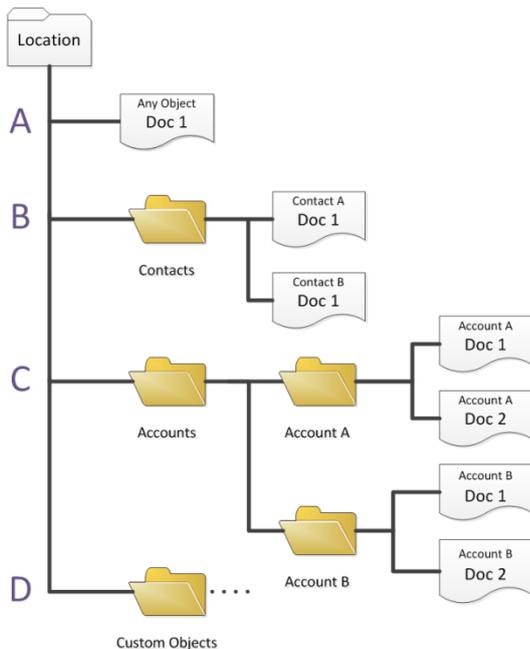
T4S simplifies document management by hiding complexity and surfacing only the required features in Salesforce. With many features automated or transparent, users in Salesforce can focus on the task at hand.

Organizations must take reasonable steps to protect personal information from misuse, loss and unauthorised access, modification or disclosure. T4S helps enterprises meet data privacy and residency requirements by on-shoring documents to TRIM and local servers. Businesses need to determine if documents should be located in the cloud, TRIM or in both locations. This can be determined object by object then a Salesforce administrator can configure T4S accordingly. When configured so the documents

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reside solely in TRIM only the document metadata is stored in Salesforce so its existence is known and it is accessible in Salesforce. If an organization chooses to store documents in Salesforce, T4S extends the native functionality by allowing the user to also save the information in TRIM. At all times, strong encryption techniques ensure document security is never compromised.

As well as attachments and chatter documents, T4S provides conversion features to push individual Salesforce records to TRIM as PDF documents and push emails as files. This makes it easy to take a snapshot of key information and save it to TRIM, thereby creating an audit and evidence trail. When any document is moved or copied to TRIM, the user can choose to push it immediately or queue it for later.



T4S allows any object in Salesforce to be individually mapped according to the business needs. Documents pushed from Salesforce.com to TRIM can be stored in a number of ways. The simplest saves all Salesforce objects to a flat structure at a configurable TRIM Location (see A).

Another option collectively saves and maps documents against an object type (B). Here, Salesforce Contacts have been mapped to a named TRIM Contacts folder.

The most granular structure (C) is where Salesforce objects are mapped separately under individual parent containers. In these mapping examples, document metadata is also pushed to TRIM for document identification and easy searching.

Documents relating to Salesforce custom objects can also be saved in TRIM (as above) as long as they are surfaced in the Salesforce GUI.

Document permissions are tightly controlled using TRIM's in-built security model coupled to the extensive security offered by Salesforce. By using TRIM Web Services T4S enforces the same security constraints as those imposed in TRIM itself. T4S offers very secure connection options including:

- Restrict page access using Salesforce roles.
- Generic TRIM access using stored credentials.
- Override generic access using individual credentials.

The T4S Data Exporter feature automatically moves Salesforce Data Exports to a local server for backup and additional on-shoring. Salesforce administrators can create a time and date schedule that automatically downloads the Salesforce objects and attachments identified in the Data Export setup.



T4S is supported by the FuseIT development team who have deep experience with Salesforce, Micro Focus Content Manager and Sitecore. T4S has been in active development since its first release in 2012.

FuseIT is a Salesforce ISV and Consulting Partner, Micro Focus Partner, and a member of the Sitecore Technology Alliance Program. We have [other products](#) that integrate these technologies.

Please contact us for a demonstration of T4S and how it can solve your challenges.

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