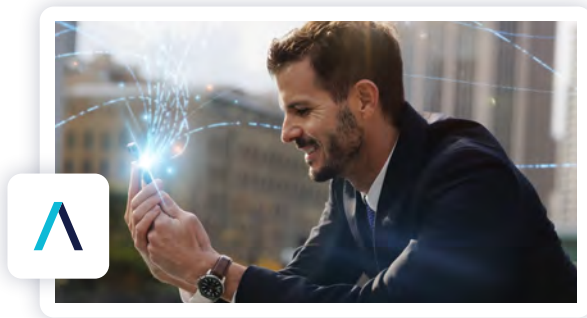


SharePoint Connector for Mitratesh CaseCloud™



Seamlessly Access SharePoint Documents Within Salesforce



The SharePoint Connector for Mitratesh CaseCloud™ bridges the gap between your Salesforce legal matter management and Microsoft SharePoint document repositories. This powerful integration enables users to access, create, manage, and edit SharePoint documents and folders directly within Salesforce, eliminating the need to switch between platforms and ensuring all matter-related documents remain in context and easily accessible.

What Makes This Integration Different & Key Benefits

Unlike basic SharePoint integrations that simply link to external sites, the CaseCloud™ SharePoint Connector provides a fully embedded experience. Users can perform complete document lifecycle operations without ever leaving Salesforce. Each record can be mapped to specific SharePoint folders, ensuring that document organization mirrors your matter structure automatically.



Native Salesforce Experience:

Access all SharePoint documents and folders directly from Salesforce Lightning record pages. No platform switching required.



Seamless Folder Management:

Connect records to existing SharePoint folders or create new ones on the fly. Each matter automatically maintains its organized document structure.



Drag-and-Drop Simplicity:

Upload files to SharePoint with intuitive drag-and-drop functionality or traditional file selection, making document management effortless.



Create Documents In-Context:

Generate new Word documents, Excel spreadsheets, and PowerPoint presentations directly from the Salesforce interface.



Automated Folder Creation:

Leverage Salesforce Flows to automatically create folder structures when new matters are opened, ensuring consistency across all matters.



Folder Templates:

Deploy pre-configured folder hierarchies with a single click, standardizing document organization across your organization.

Core Capabilities



Lightning Connector Component:

Embed the full-featured SharePoint browser on any Lightning record page, providing complete folder navigation and file operations.



Document Viewer Component:

Preview SharePoint documents directly in Salesforce or link specific documents to record fields for quick access.



Azure AD Authentication:

Secure, enterprise-grade authentication using Microsoft Entra ID (Azure Active Directory) for seamless single sign-on.



Flow Integration & Automation:

Utilize Apex invocable methods to automate folder creation, document uploads, and other SharePoint operations within Salesforce Flows.



Hierarchical Folder Navigation:

Browse through SharePoint folder structures with intuitive drill-down capabilities, viewing files and subfolders at every level.



Lightning Web Security (LWS):

Enhanced security and performance with full Lightning Web Security support, protecting against vulnerabilities while optimizing resource management.



With powerful automation, intuitive interfaces, and comprehensive document management capabilities, the **SharePoint Connector eliminates the barrier between Salesforce and SharePoint** so teams can work more efficiently while maintaining the document security and organization that SharePoint provides.



About Mitrates

Mitrates is the trusted legal technology partner to the world's leading legal organizations. More than 8,000 legal teams, including 70% of the Am Law 200 and 65% of the Fortune 100, rely on Mitrates's legal-first, AI-powered platform to drive smarter decision-making, operational efficiency, and regulatory readiness across the legal function.

Learn more at www.mitrates.com.