



Astute Solutions LLC

DocHub

In-Browser Microsoft Office Editing for Salesforce

Edit Word, Excel, and PowerPoint attachments in a single click — no downloads, no version chaos.

The Problem

Every time a Salesforce user needs to edit an attached document, the same friction repeats.



1. Download

User clicks the attached .docx from Salesforce, saves it locally.



2. Open in desktop Office

Opens in Word, edits the document, saves to local disk.



3. Re-upload as new version

Navigates back to the Salesforce record, uploads manually.



4. Version chaos

Colleague edits a parallel copy. Two versions now exist. Someone loses their work.

The daily cost

3–5 min

spent per edit on download / re-upload overhead

40%

of shared documents end up in duplicate versions

0

audit trail for who edited what, when

The Solution

One click. In-browser editing. Salesforce stays the system of record.

Click Edit Online. Microsoft Office opens in your browser. Save — and Salesforce automatically has a new version.



No downloads

Word, Excel, and PowerPoint open directly in the browser via Microsoft Office for the Web. No local file to manage, no re-upload step.



Salesforce is the source of truth

Every save writes back to the same ContentDocument as a new ContentVersion. Version history, sharing rules, CRUD/FLS all preserved.

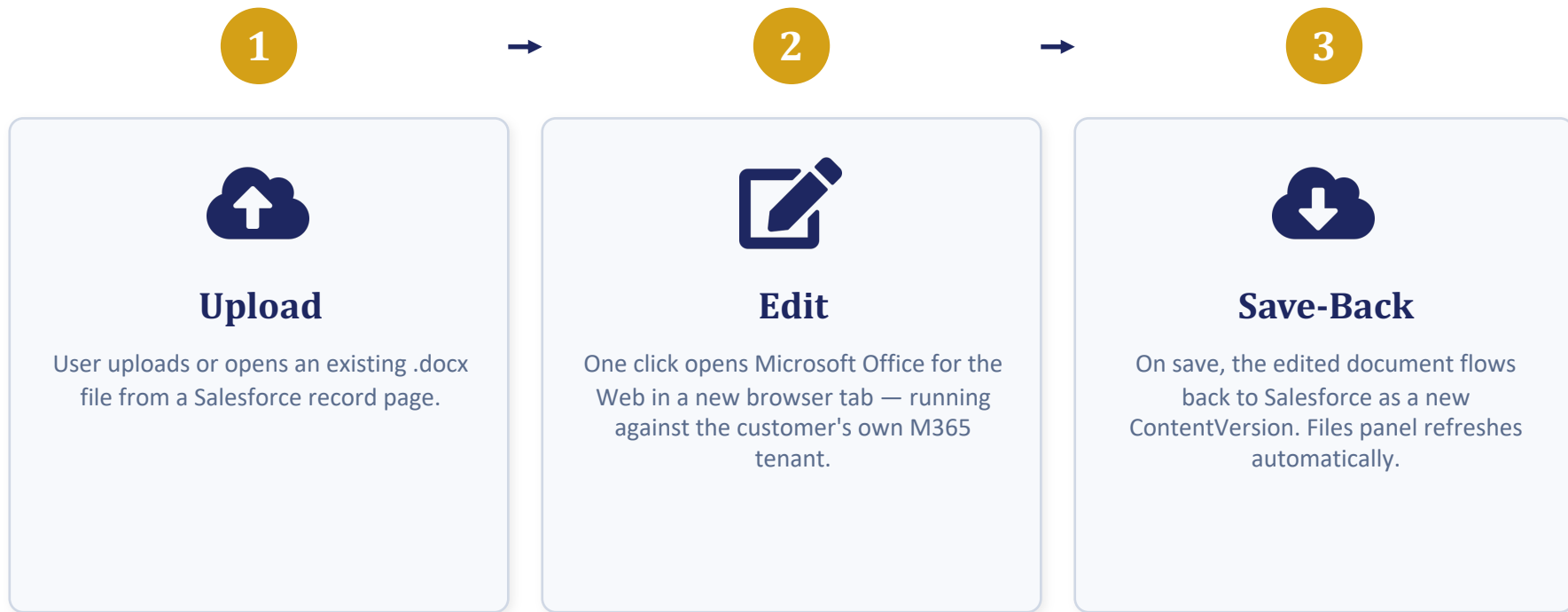


Enterprise-grade security

OAuth 2.0, AWS SigV4, KMS-encrypted secrets, per-customer isolation, minimum-scope Microsoft Graph permissions.

How It Works

A three-step flow, running end-to-end in your existing Salesforce and Microsoft 365 tenants.



The Experience — 1. File Panel

DocHub replaces the standard Salesforce Files widget with a richer, action-first experience.

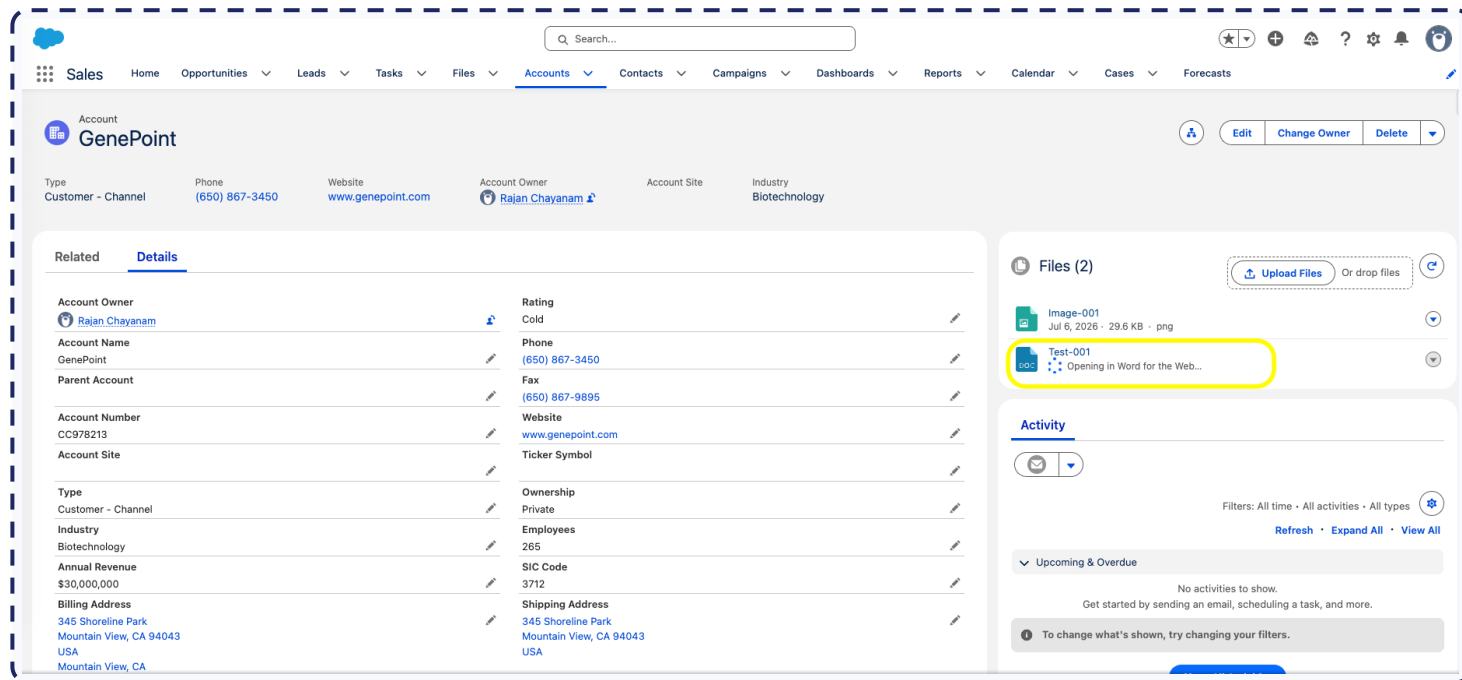
The screenshot displays the Salesforce interface for the 'GenePoint' account. The 'Files (2)' panel is active, showing two files: 'Image-001' (29.6 KB, png) and 'Test-001' (13.3 KB, docx). A yellow box highlights the 'Edit' button for the 'Test-001' file, which opens a dropdown menu with options: 'View File Details', 'Download', and 'Delete'. The 'Activity' section below shows filters for 'All time', 'All activities', and 'All types', with buttons for 'Refresh', 'Expand All', and 'View All'. The 'Upcoming & Overdue' section indicates 'No activities to show' and provides a tip: 'Get started by sending an email, scheduling a task, and more.' The 'Related' section on the left shows account details for 'GenePoint', including the account owner 'Rajan Chayanam', account name, parent account, account number, account site, type, industry, annual revenue, billing address, ownership, employees, SIC code, and shipping address.

Related	
Account Owner	Rating
Rajan Chayanam	Cold
Account Name	Phone
GenePoint	(650) 867-3450
Parent Account	Fax
	(650) 867-9895
Account Number	Website
CC978213	www.genepoint.com
Account Site	Ticker Symbol
Type	Ownership
Customer - Channel	Private
Industry	Employees
Biotechnology	265
Annual Revenue	SIC Code
\$30,000,000	3712
Billing Address	Shipping Address
345 Shoreline Park	345 Shoreline Park
Mountain View, CA 94043	Mountain View, CA 94043
USA	USA
Mountain View, CA	

Users see every attached file with the actions : Edit, View file details, Download, Delete — right on the record page.

The Experience — 2. Edit Online Action

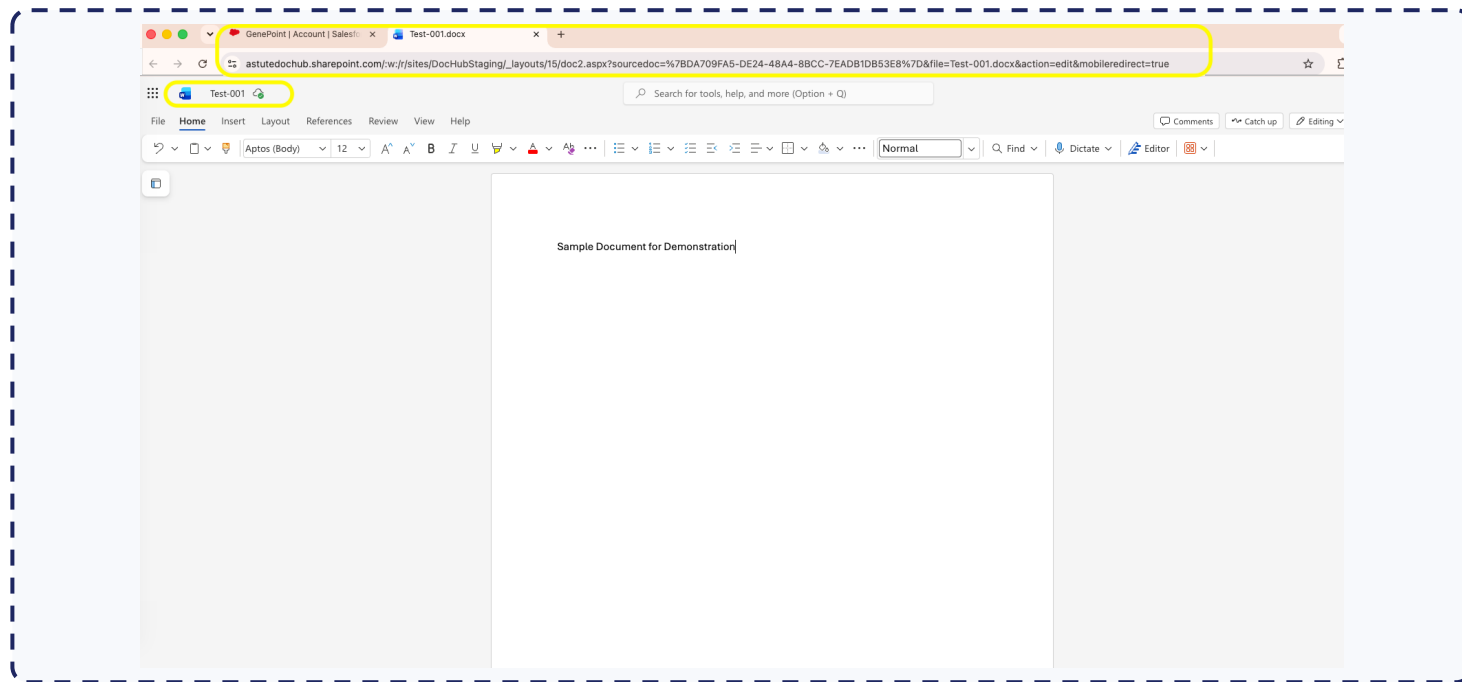
A single click launches the in-browser editor. No downloads, no local file handling.



The 'Edit' action is gated by permission set assignment. Users without the DocHub permission set never see the affordance.

The Experience — 3. In-Browser Editing

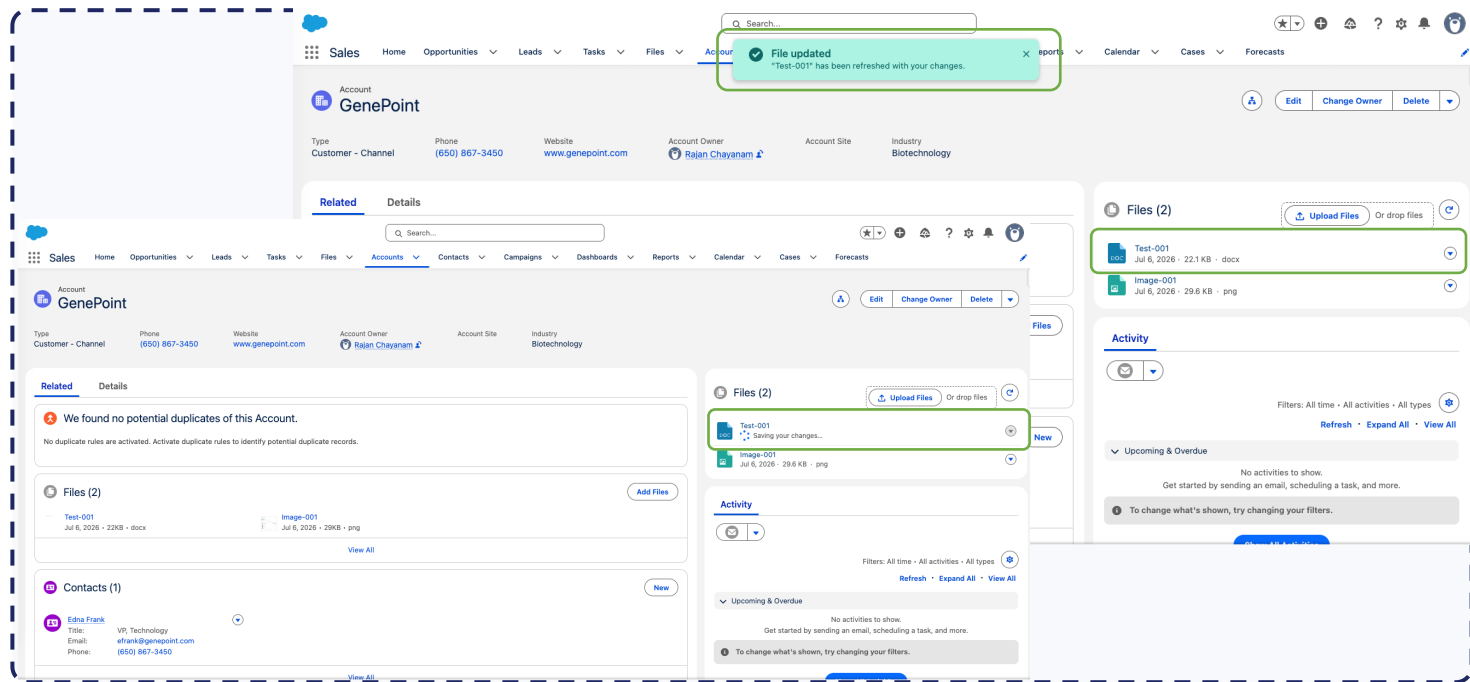
The user edits in Microsoft Word for the Web — the same experience as editing any M365 document.



The edit session runs against the customer's own Microsoft 365 tenant. DocHub never sees the document content during editing.

The Experience — 4. Automatic Save-Back

Close the tab — the edited document reappears in the Files panel as a new version.



Every save creates a new ContentVersion on the same ContentDocument. Version history, sharing rules, and audit trail are preserved end-to-end.

Security & Compliance

Built for enterprise from day one. Currently in Salesforce Security Review for public AppExchange listing.



Salesforce Security Review

Full architectural review by Salesforce's Security team for AppExchange approval. Multi-round DAST + source scanner clean.



OAuth 2.0 client_credentials only

No user OAuth flows. No refresh tokens. Server-to-server auth only, with per-customer secret isolation in AWS Secrets Manager.



AWS SigV4 + KMS encryption

Every callout signed with per-customer AWS IAM credentials. Customer-managed KMS keys, annual rotation, TLS 1.2+ everywhere.



Sites.Selected only

DocHub uses Microsoft Graph's most restricted permission scope, tied to one designated SharePoint site per customer — not the whole tenant.



Standard Salesforce sharing enforced

Every Apex class uses 'with sharing' + USER_MODE. Users only see files they have CRUD/FLS access to. Nothing bypasses the platform's controls.



Tamper-evident audit log

Every edit and save-back recorded to an S3 audit bucket with Object Lock (COMPLIANCE mode in production). No one — including us — can rewrite history.

Three Editions

Priced per user, per month. Buy only the capabilities you need today; expand as your document workflows mature.

Starter

AVAILABLE

\$15 / user / mo

Passed Security Review

- Replaces the standard Salesforce Files widget
- Upload, view, download, delete, file details
- In-browser editing of .docx, .xlsx, .pptx via Microsoft Office for the Web
- Permission-set gated for controlled rollout
- Standard sharing / CRUD / FLS enforcement

Professional

\$20 / user / mo

Planned Q4 2026 – Q1 2027

- Everything in Starter
- Additional file actions: Upload New Version, Remove from Record, Public Link
- Two-level document classification with admin dashboard
- AWS S3 storage offload to customer's own AWS account
- Cost reduction on Salesforce File Storage

Enterprise

\$30 / user / mo

Planned Q2 – Q3 2027

- Everything in Professional
- Multi-cloud storage: AWS S3, Azure Blob, GCP, SharePoint
- Five-level document classification taxonomy
- Document scanning via Amazon Textract with configurable record creation
- Agentforce integration for document-aware AI

Why DocHub

How we differ from the alternatives your team is likely already evaluating.

1 Native in-browser editing is the whole product

Competing storage-offload products treat editing as an afterthought. DocHub is built around the daily Edit Online workflow — the thing users actually do every day.

2 Salesforce remains the system of record

No parallel database, no separate file taxonomy to maintain. Every version lives on ContentDocument where your existing reporting, sharing, and audit tools already work.

3 Narrowest Microsoft Graph scope in the category

We use Sites.Selected on one designated SharePoint site — not Files.ReadWrite.All. Your Microsoft admin sees a permission scope they can actually approve.

4 Multi-cloud storage roadmap without vendor lock-in

Enterprise tier lets you offload files to AWS S3, Azure Blob, GCP, SharePoint, or Box — your choice, in your own cloud accounts, with your existing spend commitments honored.

Next Steps

1

Design workshop

One-hour session to map DocHub's Starter feature set against your specific use cases. We'll identify which record pages, file types, and user personas we prioritize first.

2

Pilot deployment

Install DocHub in a sandbox org, custom configuration for your Entra + SharePoint setup. Two to four weeks of validation with a small user group before broader rollout.

3

Production rollout

Managed AppExchange installation, custom configuration for your Entra + SharePoint setup and permission-set-based phased rollout to your Salesforce user population.

Astute Solutions LLC

DocHub is our flagship AgentExchange product.

Contact

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