

FOR SALES, SERVICE, AND SECURITY TEAMS

Secure File Exchange Inside Your Salesforce Workflow

Send, Request, and Receive Large Sensitive Files Directly from Cases, Opportunities, and Accounts, While Your Own Storage Infrastructure Stays Outside the Salesforce Cloud.

Sales Cloud

Service Cloud

Experience Cloud

The Challenge

Many customer-facing Salesforce workflows move regulated data. Patients and clinics upload records covered by HIPAA to a support case. Sales contracts carry intellectual property and personal data. Partners and customers upload sensitive files through a portal. Native Salesforce file handling may not provide the compliant transport, storage, and audit path these obligations require, and attachment limits cannot carry the largest files.

The Solution

The Kiteworks Salesforce Lightning® Plugin brings secure file exchange into the Salesforce screens your teams already work in. Users send and request files from a case, opportunity, contact, or custom object without leaving the record. Files move through Kiteworks and rest in storage infrastructure you own and control, outside the Salesforce cloud, governed by your policies and captured in your audit log.

Key Capabilities

Governed file exchange that fits the way sales and service teams already work.



No Workflow Detour

Uploads and downloads happen in the same Salesforce screens reps already use, reducing errors and rework.



Large, Sensitive Files

Move proposals, contracts, licenses, and diagnostic logs that exceed what native attachments can carry.



Your Storage, Your Control

Keep secure file storage infrastructure outside the Salesforce cloud, under your own governance policies.



Salesforce-Native Access

Specify user- and group-level access to files using your existing Salesforce sharing settings and permissions.



Browser-Simple for Customers

Customers securely download what you send and upload what you request, straight from a web browser.



Compliance-Ready Reporting

The platform gives you the controls and reporting to demonstrate compliance across every exchange.

How It Works

1

REQUEST

Ask From the Record

A rep or support engineer requests files directly from the Salesforce case, opportunity, or account they are working in.

2

COLLECT

Customer Uploads Securely

The request goes out through Kiteworks. The customer uploads the requested files securely from their web browser.

3

GOVERN

Policies Apply Automatically

Files go to your own storage infrastructure, protected by your access controls and governance policies.

4

RESOLVE

Work the Case in Salesforce

The team accesses the files inside the Salesforce record, with every action captured in the audit log.

Three Clouds, Three Use Cases

One plugin covers Sales Cloud, Service Cloud, and Experience Cloud, working on Contact, Case, Opportunity, and custom objects. A single Kiteworks instance can control multiple Salesforce instances, so governance stays consistent across business units.



Sales Cloud

On the opportunity record, a rep sends pricing and contract redlines to the buying committee and requests the signed agreement back. No attachment limits, no personal email.



Service Cloud

A support engineer requests diagnostic logs and configuration files from the case itself. The customer uploads from a browser and the files attach to the case number.



Experience Cloud

Partners and customers working in your community portal exchange documents from the record they are already on, under the same policies and the same audit log.

In Practice: ITAR-Controlled Support Data

A defense industry software firm supports customers whose technical data is ITAR-controlled. The firm's commercial Salesforce native file handling does not provide the compliant transport path this data requires for export licensing.



Customers Upload From the Case

The customer uploads multi-terabyte logs and databases from the case window, but the files travel from their own system straight into Kiteworks, never through Salesforce. These external users need no Kiteworks licenses.



Support Troubleshoots Internally

The team relays files to a hardened internal environment for troubleshooting. Nothing goes back out through Kiteworks.



Compliance Runs Through the Flow

Each upload goes into a folder named for the Salesforce ticket ID, every transfer is audited, and files are purged when the ticket closes, all on a Kiteworks platform that is FedRAMP High In Process.

Ready to secure the files moving through Salesforce?

www.kiteworks.com

Kiteworks



Kiteworks' mission is to empower organizations to effectively manage risk in every send, share, receive, and use of private data. The Kiteworks platform provides customers with a secure data exchange that delivers data governance, compliance, and protection in a unified control plane. Kiteworks unifies, tracks, controls, and secures sensitive data moving within, into, and out of their organization, significantly improving risk management and ensuring regulatory compliance on all private data exchanges. Headquartered in Silicon Valley, Kiteworks protects over 100 million end-users and thousands of global enterprises and government agencies.