

OpenText Extended ECM for Salesforce brings content management to your CRM processes

Improve customer insight and streamline sales



Simplify the information management landscape by unifying CRM and ERP with ECM



Avoid miscommunication and improve customer experience



Accelerate sales cycles by sharing and reusing best practice materials



Reduce risk and deploy flexibly

Every organization seeks to increase agility and productivity by extracting the maximum value from its processes and content. However, knowledge workers in marketing, sales and services are only as good as the information they can efficiently access. OpenText™ Extended ECM for Salesforce® bridges the silos created by disparate applications in marketing, sales and services to pull structured and unstructured information together seamlessly and present the complete picture to users who need it.

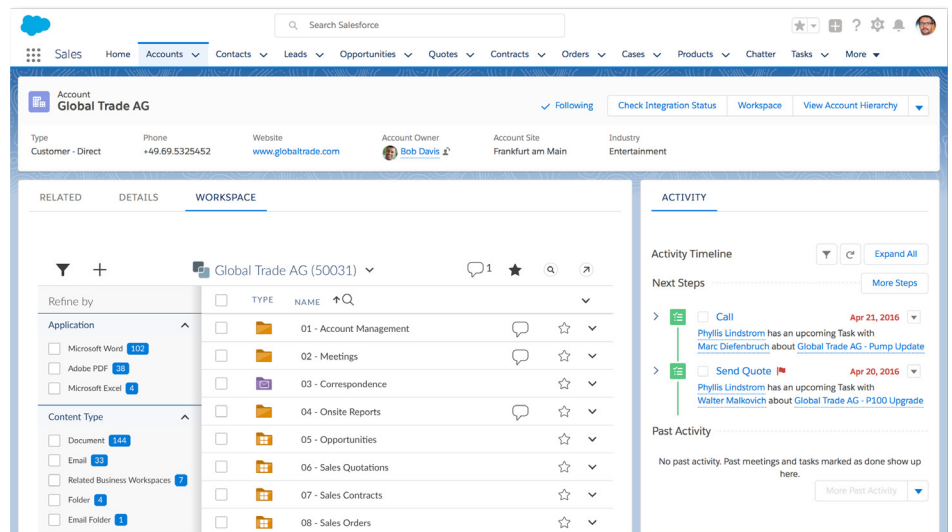
Bringing CRM and ECM together rapidly and seamlessly

One of the most pressing challenges of Salesforce customers is to connect their CRM application to other systems and improve adoption. Integrating content management and adding value to CRM applications is a top priority for many Salesforce users.

With Extended ECM for Salesforce, OpenText is delivering on this demand. Extended ECM for Salesforce connects Salesforce cloud services to the Extended ECM Platform and surfaces enterprise content management capabilities and content inside the Salesforce user interface.

The solution builds upon the OpenText Extended ECM 20.2 platform, developed in a cloud-native architecture that allows customers the choice of where to deploy from on-premises to hyperscaler platforms. The new architecture allows customers to deploy and upgrade faster, allowing end users faster access to new features. The core capabilities of the Extended ECM platform include document management, records management,

capturing, archiving and workflow and collaboration, making them available to Salesforce users. Connectivity, automated data synchronization routines and UI widgets enhance the Force.com platform, transforming it into a content hub for marketing, sales and services.



From sales data chaos to streamlined customer information

In order to avoid errors, salespeople need to work with the latest version of contracts, product information or customer order history. To sell more successfully, salespeople should reuse materials that have resonated well with customers. Managing content may present complexities for salespeople, but OpenText can help simplify the process.

Extended ECM for Salesforce offers a deep and feature-rich integration of the successful OpenText content management platform into Salesforce, including best-of-breed user experience and functionality, automated routines around content hierarchy creation, linking and metadata governance. Templates, property providers and permission profiles allow users to tune content management to organizational policies and guidelines, ensuring that data and content are never out of sync. The solution also enables flexible deployments, connecting the Salesforce cloud to the OpenText cloud or on-premises installation.

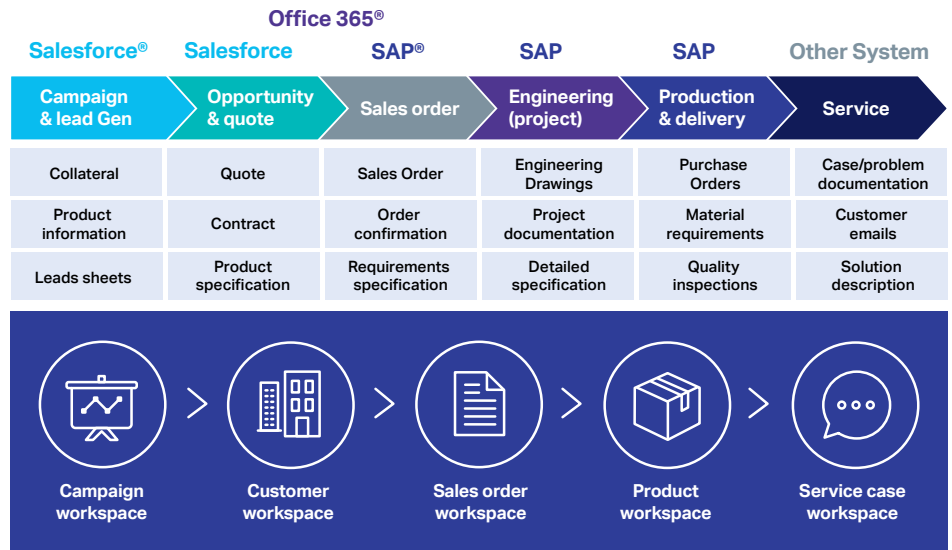
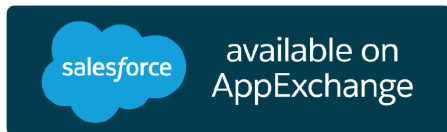
Improving productivity: making content accessible and relevant

Extended ECM for Salesforce provides instant, contextual, enterprise-wide information amalgamation, collaboration and document creation related to the specific case or opportunity. By extending and enhancing the Salesforce platform with OpenText, sales and services representatives can access the relevant information they need dynamically, helping them become more efficient and on target when it comes to client development and support. In addition, OpenText solutions help ensure regulatory compliance, adherence to security policies and cost savings.

Simplify content management based on a single integrated EIM platform

Best-in-class companies realize that marketing, sales and service processes accelerate and improve when campaign dossiers, customer files and services workspaces deliver complete and up-to-date collections of marketing assets, communication or field records. As well, content that is indirectly linked to these processes, such as material specifications, machine records, supply chain dashboards or aggregated IoT data, also contribute to excellent customer insight and service.

[Learn more](#)



Extended ECM mobilizes this data and turns it into competitive advantage by delivering a unified enterprise content management backbone that integrates with the multitude of business applications, runs in hybrid environments and can be implemented both on-premises or in the OpenText cloud or Microsoft® Azure™. With Extended ECM for Salesforce, users of Salesforce, SAP®, Microsoft® or Oracle® software gain a unified, 360-degree view of structured and unstructured information directly within their chosen application UI. Users therefore no longer have to logon to multiple applications and sort through numerous screens to unify information. Microsoft and mobile users are also included in Extended ECM solutions, accessing content in Windows® Explorer, Microsoft® Office, Microsoft® SharePoint® or Microsoft® Office 365™ and working with iOS™ and Android™ apps or the responsive Extended ECM UI on tablets and smartphones. Further, file sharing and sync capabilities can be deployed with OpenText™ Core™.

Optimize marketing, sales and services with Extended ECM for Salesforce

Extended ECM for Salesforce drives customer insight, improves sales and service productivity and simplifies IT platforms—three key objectives on every digital business agenda delivered on a solid information management platform inside the Salesforce application.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://www.opentext.com).

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