

OpenText Content Management for Salesforce® brings modern content management to your CRM processes

Improve customer insights and streamline sales



Benefits

- Simplify information management by unifying CRM and ERP with ECM
- Improve customer experiences and avoid miscommunication
- Accelerate sales with a 360-degree customer view
- Reduce risks and stay compliant

Sales, Service and Marketing teams are only as good as the information they can efficiently access. OpenText™ Content Management for Salesforce® bridges information silos to pull structured and unstructured information together seamlessly, presenting a complete 360-degree view to users.

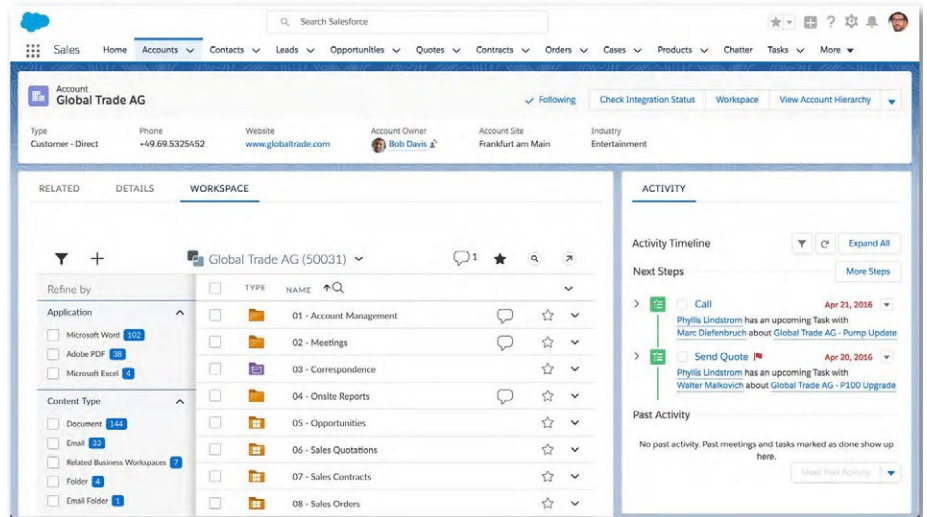
Two of the most pressing challenges for Salesforce® users are connecting their CRM application to other systems and improving adoption. Integrating content management adds value to CRM applications by reducing misinformation that can cause lost productivity and customer frustration.

Connecting Salesforce platforms to OpenText™ Content Management (formerly known as OpenText™ Extended ECM) surfaces enterprise content management capabilities and content ins

Unify CRM and ERP with ECM

The OpenText Content Management for Salesforce cloud-native architecture allows organizations to choose where to deploy, from on-premises to hyperscaler platforms.

Organizations can provide Sales and Service agents swift access to document management, records management, capture, archiving, workflow and collaboration. Single sign on, automated data synchronization routines and experience cloud widgets enhance the Salesforce platform, transforming it into a content hub for marketing, sales and services.



Access OpenText Content Management from within the Salesforce user interface

Go from sales data chaos to streamlined customer information

To avoid errors, Sales colleagues need to work with the latest version of contracts, product information and customer order history. To sell more successfully, they should reuse materials that have resonated with other customers. Ensuring what they need is always at their fingertips can be difficult.

OpenText Content Management for Salesforce includes 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.

Improve productivity: Making content accessible and relevant

OpenText Content Management for Salesforce provides instant, contextual, enterprise-wide information amalgamation, collaboration and document creation related to specific cases or opportunities. Sales and services representatives can access the relevant information they need dynamically within the tool they already use, helping them be more efficient and on target when it comes to client development and support. The solution can also help ensure regulatory compliance, adherence to security policies and cost savings.

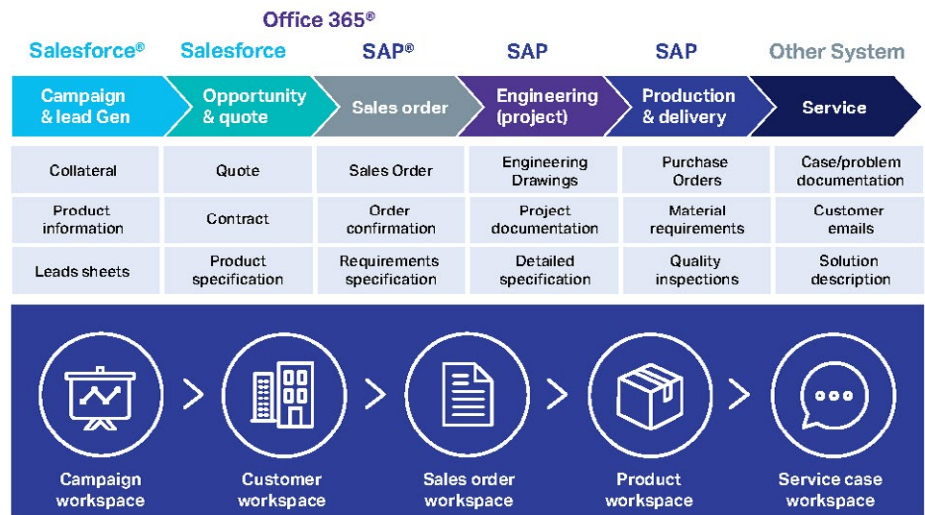
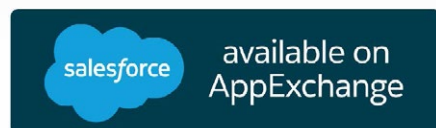
Simplify content management with a single integrated EIM platform

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, communications or field records. Content indirectly linked to these processes, such as material specifications, machine records, supply chain dashboards or aggregated IoT data, can also contribute to excellent customer insight and service.

OpenText Content Management mobilizes this data and turns it into competitive advantage by delivering a unified enterprise content management backbone that integrates with a multitude of business applications, runs in hybrid environments and can be implemented on premises, in the OpenText™ Cloud or in a hyperscaler environment.

Resources

[Learn more >](#)



Optimize marketing, sales and services with OpenText Content Management for Salesforce integrations

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 log on to multiple applications and sort through numerous screens.

Microsoft and mobile users can access content in Windows® Explorer, Microsoft® Office, Microsoft® SharePoint® or Microsoft® Office 365® as well as working with iOS™ and Android™ apps or the responsive Extended ECM UI on tablets and smartphones. File sharing and sync capabilities can be deployed with OpenText™ Core Content Management.