Optimize your marketing, sales, and services with OpenText Exstream and Extended ECM

Improve customer insight and streamline sales with OpenText™ Extended ECM for Salesforce®

What if your sales, service, and marketing people using Salesforce.com® for campaigns, opportunity management, or customer service could access all relevant documents such as collaterals, contracts, proposals and invoices right from Salesforce®? And they could generate highly personalized correspondence from Salesforce via a built-in rules engine, including quotes, proposals, contracts, service documents, and correspondence follow-ups? No switching applications between Salesforce and your document management or struggling to figure out which document is the right version. And even better, what if this content were consistent with related business platforms such as SAP®, Oracle®, or Microsoft®?

OpenText Extended ECM for Salesforce connects Salesforce cloud services to the OpenText Extended ECM Platform and surfaces ECM capabilities and content inside the Salesforce user interface choice (Lightning, Salesforce1 or Classic). The Extended ECM Platform also spans SAP, Oracle, and Microsoft applications.

Extended ECM takes care of the content—the whole lifecycle of the content. And content comes in many forms: document, email, and increasingly, digital media such as images and videos.

And it provides access to content anywhere at any time—content with context, making it relevant, actionable, and personal. It is also integrated with the leading business process, such as in CRM, ERP/Finance/Manufacturing, and supply chain.

The platform increases productivity, improves customer service, fosters better and faster decisions, and provides a stable framework for compliance.

The Extended ECM Platform includes capabilities such as Document Management, Records Management, Capturing, Archiving, Workflow, and Collaboration and makes these capabilities available for Salesforce users. In addition, Extended ECM UI widgets surface content viewing, editing, and management inside the Salesforce user interface. While Extended ECM for Salesforce runs inside the Force.com® infrastructure, organizations can deploy the related Extended ECM Platform component on-premises or in the cloud.

OpenText™ Exstream for Salesforce is a cloud-based enterprise solution for interactive and mobile document generation and further processing of output correspondence and business documents. Exstream can pull Salesforce information, and depending on the data and the interactive user input, the document content will change dynamically. After creating these documents, Exstream supports multichannel output methods (print, email, SMS, etc), also storing auditable document versions in OpenText Extended ECM for Salesforce and updating or creating data in Salesforce.

Adding each of these integrated OpenText solutions to your organization’s Salesforce applications assures everyone has access to the same single version of the truth across all platforms. Information becomes more relevant and more personal, all in real time.

Join the nearly 500 large global companies already benefitting from OpenText Exstream and Extended ECM—the digital information platform across all your enterprise business suites.