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

Improve customer insight and streamline sales and service processes

Simplify the information management landscape by unifying Salesforce CRM and ERP with Documentum

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, team members in marketing, sales and services are only as good as the information they can efficiently access. OpenText Extended ECM Documentum 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 Salesforce CRM and ECM together rapidly and seamlessly

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

With Extended ECM Documentum for Salesforce, OpenText is addressing this demand. Extended ECM Documentum for Salesforce connects Salesforce Sales and Service clouds to the Documentum Platform and surfaces enterprise content management capabilities and content seamlessly inside the Salesforce user interface.

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The solution builds on OpenText Documentum Platform, which includes 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 your marketing, sales and services teams.
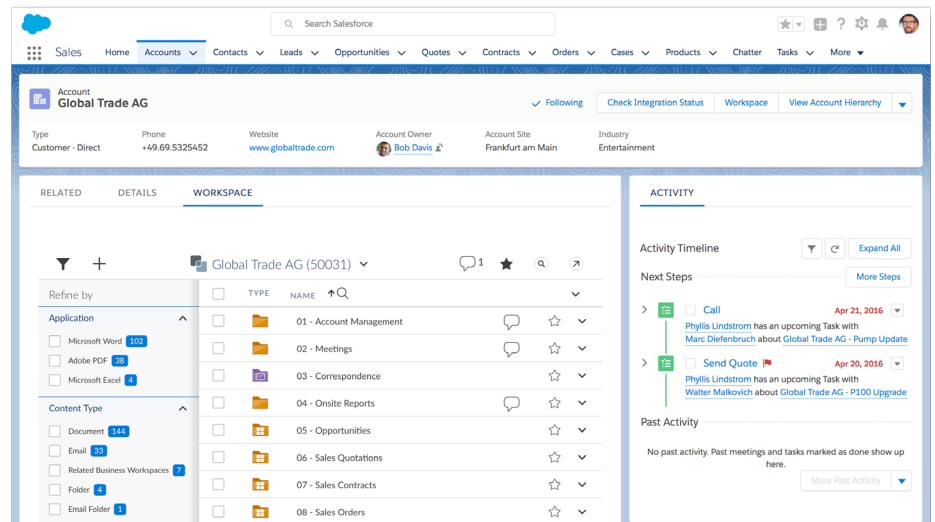

From sales data chaos to streamlined customer information

In order to avoid errors, sales teams need to work with the latest version of contracts, product information or customer order history. To sell more successfully, sales teams 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 Documentum for Salesforce offers a deep and feature-rich integration of the successful OpenText Documentum 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 synch. The solution also enables flexible deployments, connecting the Salesforce cloud to the OpenText cloud, Hyperscaler cloud, or on-premises installation.
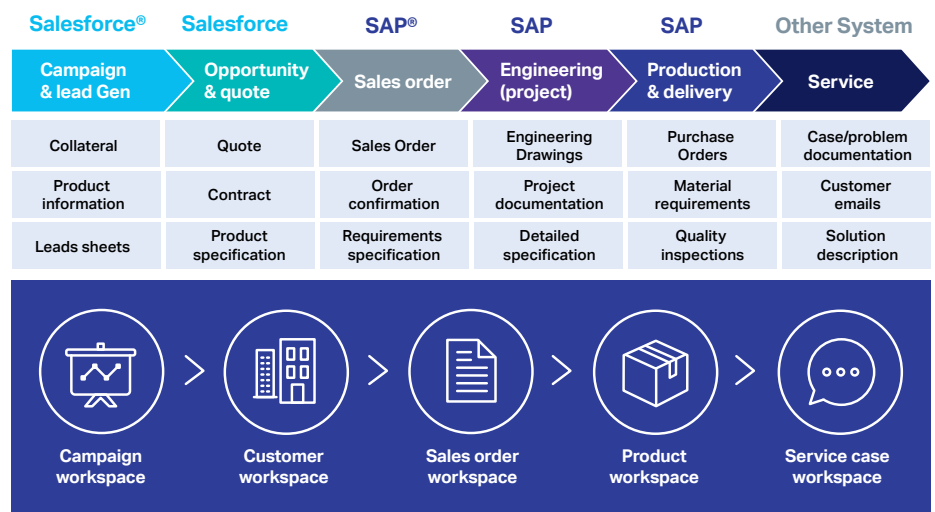
Improving productivity: making content accessible and relevant

Extended ECM Documentum for Salesforce provides instant and contextual access to enterprise-wide information, collaboration and document creation related to the specific Salesforce process. By extending and enhancing the Salesforce platform with OpenText, sales and services teams 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.

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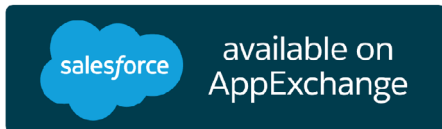
Simplify content management based on a single integrated EIM platform

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.

Salesforce®	Salesforce	SAP®	SAP	SAP	Other System
Campaign & lead Gen	Opportunity & quote	Sales order	Engineering (project)	Production & delivery	Service
Collateral	Quote	Sales Order	Engineering Drawings	Purchase Orders	Case/problem documentation
Product information	Contract	Order confirmation	Project documentation	Material requirements	Customer emails
Leads sheets	Product specification	Requirements specification	Detailed specification	Quality inspections	Solution description

Campaign workspace	Customer workspace	Sales order workspace	Product workspace	Service case workspace

OpenText Documentum mobilizes the 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. With Extended ECM Documentum for Salesforce, Salesforce users experience 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 find relevant information.

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**.

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