ɑ **opentext**™

OpenText Content Management for Microsoft Dynamics 365 Sales and Service

Connect Microsoft Dynamics 365 with OpenText Content Management to organize content and data in one place—boosting collaboration, sales, and service success

Benefits

- Unify sales and service documents in one connected business workspace
- Boost productivity with smarter sales and service workflows
- Unlock insights from both structured and unstructured data
- Protect enterprise content with security and compliance

Sales, marketing, and service teams using Microsoft Dynamics 365® often struggle to manage growing volumes of documents, content, and data. Disconnected systems, limited access, and manual processes slow down decision-making, introduce errors, and damage customer experience—holding businesses back from reaching their full revenue potential.

To boost collaboration, workplace productivity, and provide a single source of truth for customer-facing content, organizations must connect client data with sales, marketing, customer service, and field service business processes.

OpenText™ Content Management for Microsoft Dynamics 365 Sales and Service® bridges the gap, integrating critical business content directly into Dynamics 365.

The solution delivers powerful content services to enrich customer-facing operations. Teams have consistent access to real-time data and documents, enabling informed decisions, faster service, and better client experiences. With easier access to complete customer records, organizations can accelerate sales cycles, grow customer relationships, and remove friction from every interaction.

Accelerate sales cycles

Seamless integration between OpenText™ Content Management and Dynamics 365 connects people, content, and processes. Business Workspaces create repeatable collaboration patterns, keeping pursuit teams, service agents, and marketing teams aligned and productive.

Drive productivity, collaboration, and customer service

At the core of the solution is the Business Workspace, intelligently linking content to Microsoft Dynamics 365 process flows. Users, including sales teams, call center agents, dispatchers, and field-service staff, stay within the familiar Dynamics 365 environment while accessing all related client content.

Maximize the value of structured and unstructured content

All content updates automatically synchronize across connected systems, improving data quality and eliminating manual rework. Whether drafting proposals, managing cases, or handling service requests, teams work from a central engagement portal that shares and updates information in real-time.

# Protect sensitive information with rights-based access control

Role-based permissions and business rules ensure users see only the information they are authorized to access without needing to navigate multiple systems. Sensitive content remains protected while keeping critical data easily accessible inside the Dynamics 365 interface.

Enable 360-degree insight for smarter decisions

Dynamic, real time content surfaces a single source of truth for every client engagement. New account managers or service agents can immediately step into client relationships armed with complete context, improving responsiveness, personalization, and customer loyalty.

Maintain control over enterprise content

With the rise of unstructured, unmanaged content, regulatory and legal risks are growing. OpenText automatically applies records management policies to all unstructured content, whether it was created in Microsoft Office 365® or in business systems, ensuring secure lifecycle management from creation to archiving or disposal.
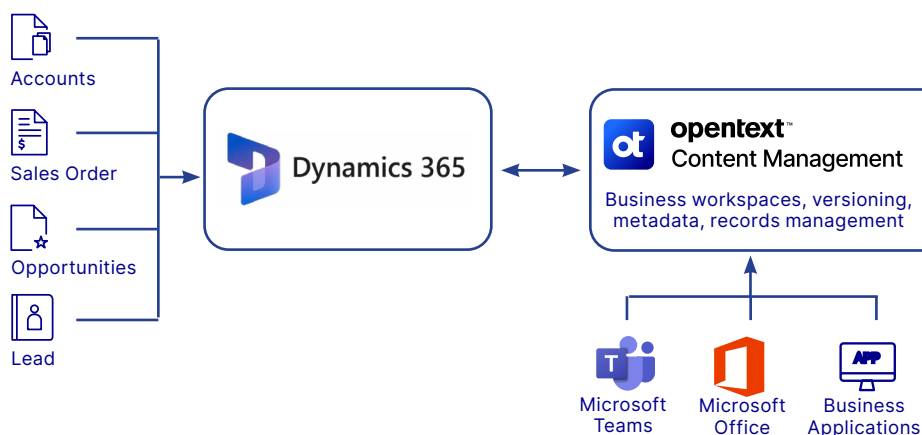
OpenText Content Management for Microsoft Dynamics 365 Sales and Service deployment options:

Accelerate cloud strategies with OpenText cloud experts

- OpenText Managed Private Cloud

Extend your team

- On-premises software, managed by your organization or OpenText

Run anywhere and scale globally in the hyperscaler cloud of your choice

- Hyperscaler cloud partners (OpenText Private Cloud, AWS private or public cloud, GCP private or public cloud, Azure private or public cloud)
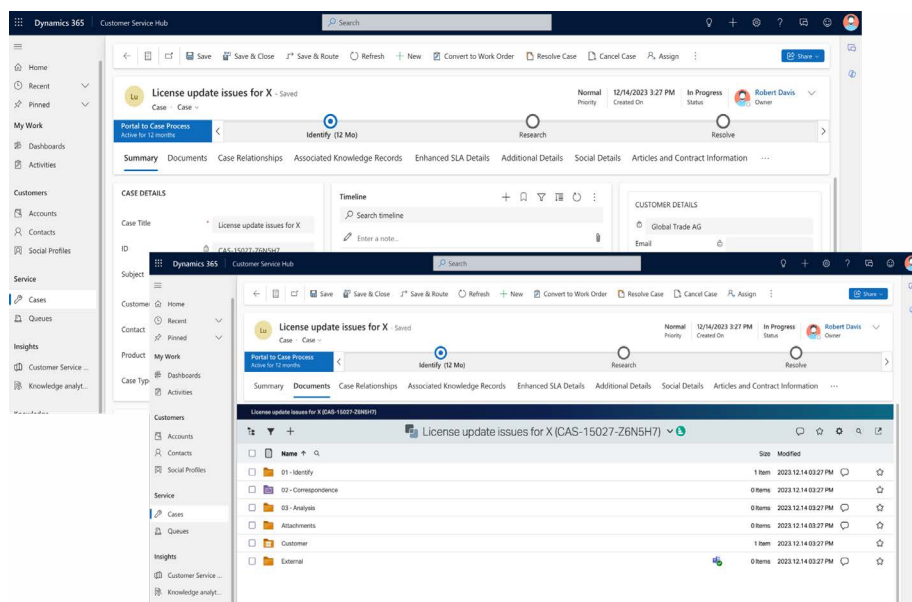

Figure 1 - Example of an embedded Business Workspace in Dynamics 365 Sales and Services. Users access a view from OpenText Content Management, containing the files and folders related to a customer case.
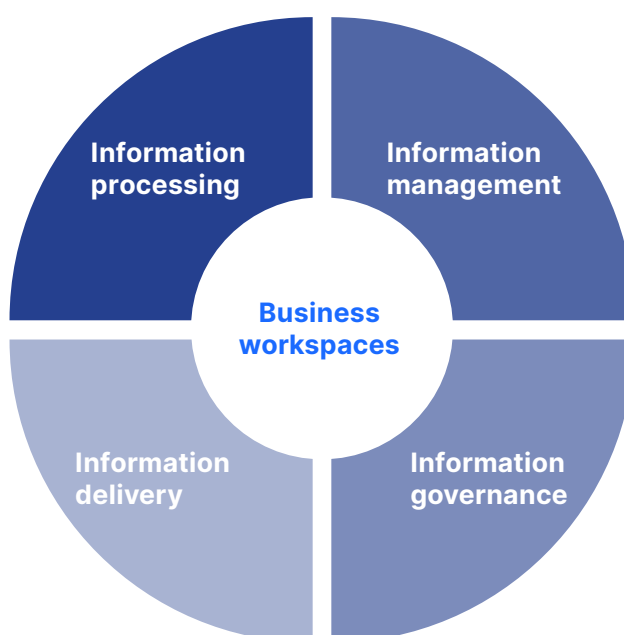

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Content Management

for Microsoft Dynamics 365 Sales and Services

Business workspaces

- Information processing
- Information management
- Information delivery
- Information governance

Digital workplace

Personal and team productivity

- Content creation
- Communication
- Ad-hoc collaboration

Digital business

Process productivity and compliance

- Extend content services into lead applications
- Transactional content services
- Repeatable collaboration

Feature/Component	Description
OpenText Content Management Integration	Seamlessly connects sales and service processes with structured content across Dynamics 365 Sales and Service.
Business Workspaces	Links auto-generated workspaces to leads, opportunities, cases, and more to support structured, compliant collaboration.
Sales Enablement Content Hub	Provides sales teams with access to proposals, contracts, RFIs, and marketing assets to accelerate deal velocity.
Customer Service content access	Empowers agents and field teams with service contracts, warranty info, product documentation, and real-time case files.
Mobile and offline support	Supports access to business-critical documents on mobile devices, even while offline.
Preconfigured templates	Standardized templates accelerate workspace setup for sales, service, and marketing scenarios.
Records and compliance management	Applies governance, retention, and audit policies automatically to ensure consistency and mitigate risk.
Unified UI integration widget	Embedded UI in Dynamics 365 for in-context content access, no need to leave the application.
Microsoft collaboration tools	Enables co-authoring and sharing using Microsoft Teams®, Outlook®, and Office tools directly from Dynamics.

OpenText Content Management for Microsoft® Dynamics 365™ Sales and Service brings together the power of business content and customer data inside the applications your teams use every day. By embedding enterprise-grade content services directly into Microsoft Dynamics 365, OpenText helps organizations accelerate sales, deliver outstanding customer service, and drive greater productivity—without disrupting familiar workflows. Unlike other solutions, OpenText offers seamless, secure integration that unifies structured and unstructured data, improves compliance, and creates a single source of truth to empower smarter decisions and lasting customer loyalty.

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