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PRODUCT OVERVIEW

OpenText™ Core Capture for Salesforce®

Intelligently ingest documents and extract data to accelerate sales and service processes

Simplify document intake and routing for Sales and Service

Capture insights to deliver better results

Extract document data to map to Salesforce® fields

Automate and accelerate processes

Sales and service teams struggle with documents that need to be captured as part of critical information flows and Salesforce® processes. Manual document intake is time-consuming and repetitive, causing bottlenecks and costly errors, as well as impeding sales opportunities and creating poor customer experiences. An integrated approach to streamlining the intake and processing of customer information reduces sales and service cycle times, accelerates operations and improves customer satisfaction.

OpenText™ Core Capture for Salesforce® is a Software-as-a-Service (SaaS) capture application that automates document classification and data extraction. Core Capture combines standard features, such as optical character recognition (OCR), with powerful machine learning to automate content ingestion and accelerate information routing to the right users.

Integrating Core Capture with Salesforce allows for capturing unstructured business content and processing it. The solution can then use the results to store the document, update Salesforce records with extracted data and automate key processes.

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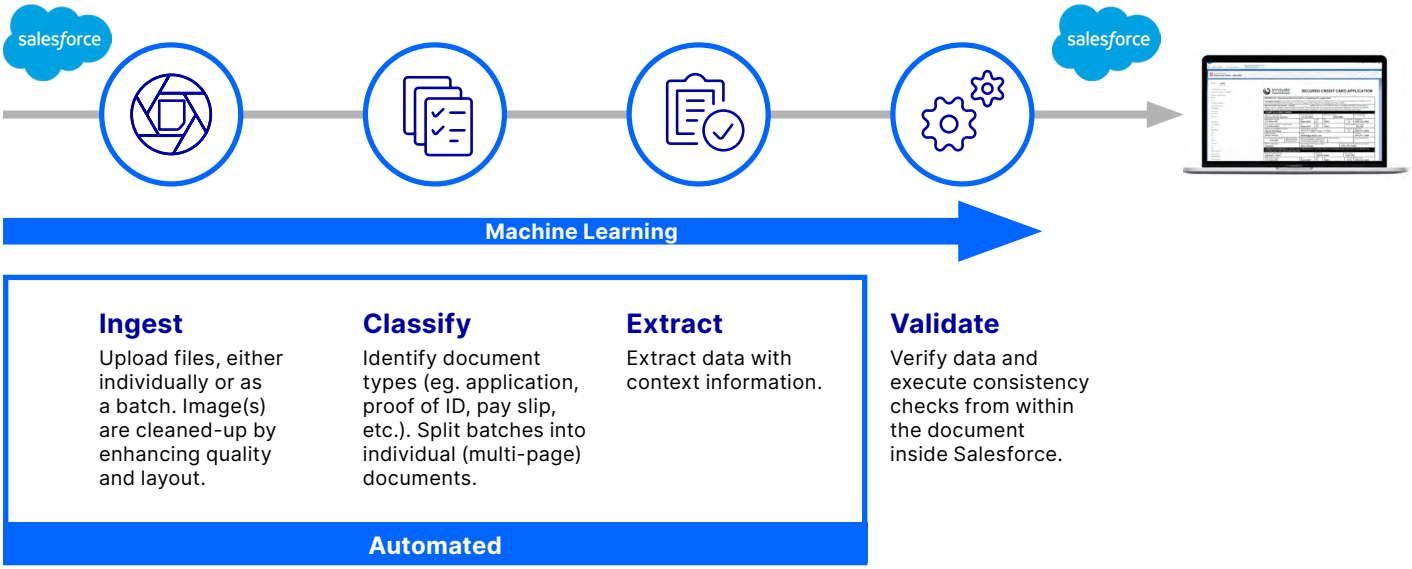
Core Capture for Salesforce – How does it work?



See how Core Capture for Salesforce integrates to deliver automation and machine learning-driven efficiencies for document and data extraction.

Seamless, powerful integration with Salesforce offers major efficiency improvements compared to alternate document processing methods. With Core Capture, organizations can automatically classify documents and translate them into valuable Salesforce data directly, using captured information such as contract numbers, contact details and more directly within Salesforce fields. That information can then be leveraged with the Salesforce Automation Framework for additional process optimization.

Digitizing inbound processing provides sales and service agents early visibility so they can prioritize urgent, value-add tasks. Automating repetitive tasks streamlines processing, leading to improved customer satisfaction and a better employee experience. Populating relevant information to all connected systems delivers a single source of truth across departments and teams and expedites the digitization of key sales processes.

Simplify document intake and routing for Sales and Service

Intelligently identify all document types to reduce time-consuming sorting and processing, enabling users to increase productivity and focus on higher-value work.

Capture insights to deliver better results

Intelligently capture mission critical documents of all types, then categorize and route them to the right people, places and processes within Salesforce environments. Provide realtime access to information to enable Sales and Service teams to make smarter and faster decisions to enhance customer experiences.

Extract document data to map to Salesforce fields

Reduce document and manual data processing time and costly human errors by automating document identification and the extraction of information with AI-assisted machine learning. Provide critical inputs to Salesforce data fields to expedite operational processes and boost user productivity.

Automate and accelerate processes

Document recognition and categorization of incoming sales and service documents within Salesforce ensures key insights get surfaced within processes. These consumed documents and data can help automate manual repetitive tasks and streamline processing times, leading to improved operations, higher customer satisfaction and better employee experiences.

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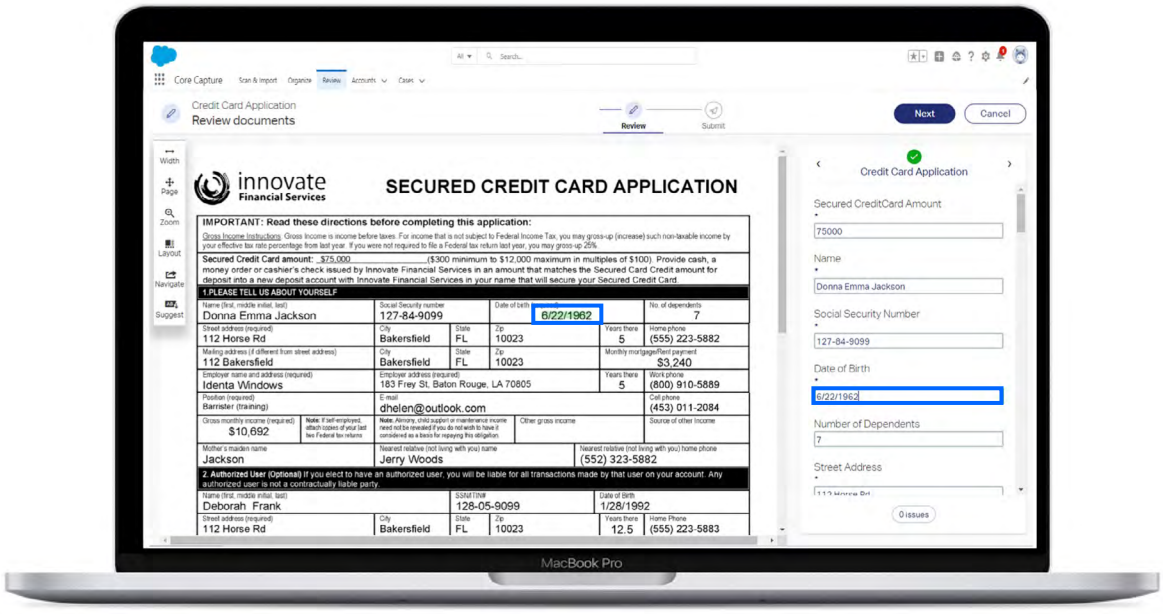
Feature	Description
Capture and ingest incoming digital documents	Digitize, upload, categorize, route documents, process information sources and automate document handling.
Classify documents	Identify document types (application, proof of ID, pay slip, etc.) to categorize and route them.
Extract data and validate relevant information for Salesforce processes	Extract critical data from customer documents to accelerate and enrich Salesforce processes.
Run anywhere with public cloud (multi-tenant SaaS)	Ensure business information is protected and always available. Get on-demand scaling, instant access to emerging technology, reduced operational costs and optimized processes for Salesforce.



Capture inbound documents and automatically extract data to populate Salesforce fields

- Additional OpenText Solutions for Salesforce
- Visit OpenText on the Salesforce AppExchange
- Core Capture for Salesforce Website
- Explainer Overview Video

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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