



## SOLUTION OVERVIEW

# OpenText Exstream™ for Salesforce

Strengthen relationships and drive incremental business with document generation seamlessly integrated into Sales, Service and Financial Services Cloud®



 **Lowers costs** and enhances productivity

 **Ensure compliance** and quality

 **Offers flexible** deployment options

 **Optimizes sales,** marketing and services

**In today's digital marketplace, organizations need to exploit every opportunity to communicate clearly and consistently across all channels and mediums, whether print, email, SMS, web, mobile or social.**

OpenText™ Exstream™ for Salesforce® empowers users to create many different types of customer correspondence directly from within their CRM system. This immediate and accurate communication can help improve customer engagement and loyalty, helping to increase profits and lower costs.

### **Lower costs and enhances productivity**

Exstream for Salesforce enables sales teams and customer agents to communicate more effectively. Generating all customer correspondence from a single source, users can access, revise, repurpose and personalize content faster, with less effort and fewer errors.

### **Ensures compliance and quality**

Users can match the message to the customer and situation. Customers can also standardize templates, policies, control and auditability for customer communication. By generating customer engagement documents using only approved content, organizations maintain tight control over their brand and messaging.

## Offers flexible deployment options

Exstream for Salesforce is an application downloaded from the Salesforce AppExchange. There are two different operating modes offered:

1. **SaaS mode.** Subscribe to our market leading Customer Communication services to rapidly adopt document generation capabilities.
2. **Enabler mode.** Connect seamlessly to a dedicated OpenText™ Exstream™ platform, wherever it is installed.<sup>1</sup>

## Optimizes sales, marketing and services

The document generation solution brings together the industry's leading customer communication management (CCM) product family from OpenText with Salesforce Customer Relationship Management (CRM) cloud solutions.

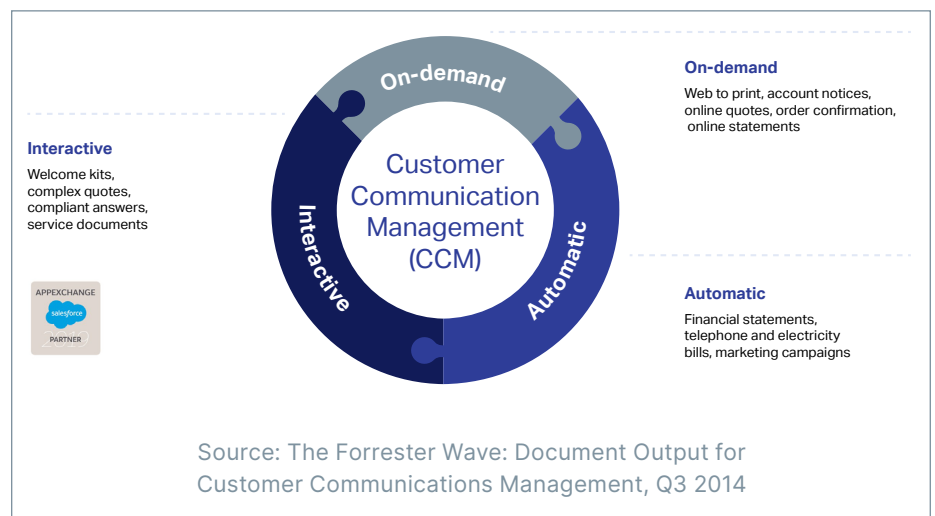
Exstream for Salesforce helps drive customer insight, improve sales and service productivity and simplify IT platforms—three key objectives on every digital business agenda.

For organizations with sophisticated document processes looking to enable line-of-business users, Exstream for Salesforce deploys with a full range of post-processing options. Organizations can save correspondence to Salesforce, a standard file system repository, OpenText™ Extended ECM for Salesforce®, backup server or business system and send out correspondence via email or upload it in batches to a print shop via FTP.

The OpenText solution is flexible enough to support almost any conceivable channel, including print, email, SMS, web, mobile and social. Other possibilities include advanced IVR integration for automating written responses to phone inquiries and integration with Google® Drive and Google® Docs for collaborating on longer documents, such as complex proposals.

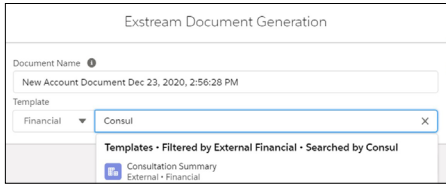
## Exstream for Salesforce

Exstream for Salesforce allows you to configure the creation steps to meet your own process. Three typical scenarios and example documents are shown below:

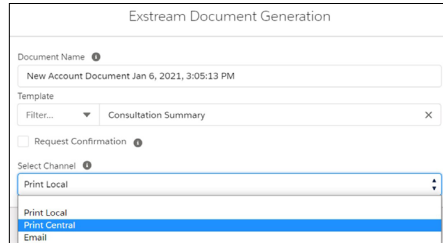


<sup>1</sup> Screen flow in this document represents Enabler mode. Similar functionality available in SaaS mode with different appearance.

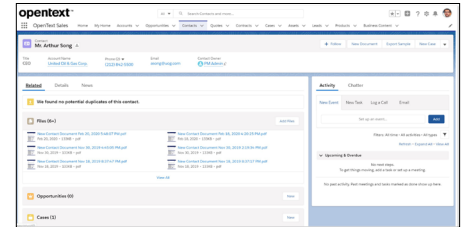
## Easy Steps to generate Personalized Documents in Salesforce



Choose a name for your document, and select an available template using our smart filtering.



Choose which of the available channels is the right delivery mechanism.



Either finalize your document in the embedded web editor or find your created document instantly available within the Salesforce object.

Features	Benefits
A single app available on the Salesforce AppExchange	Evaluated by Salesforce for security compliance and with regular updates from OpenText
User interface support	Offers support for Sales, Service and Financial Services Cloud
Device agnostic solution	Provides access from any technology platform, including Apple iPad®, Android tablets, Microsoft® Windows® PCs and other computing devices
Multilingual	Includes support for 10+ languages
SaaS mode	Let OpenText quickly deploy our Salesforce specific SaaS platform to enjoy the best of the Extream CCM platform on a per use per price model
Enabler mode	Enables users to realize the benefits of the Extream platform; requires Communication Server 16.4
Support for Process Builder and Flows	Configure Salesforce tools to generate content automatically based on triggers and events within CRM <sup>2</sup>

- [Salesforce solutions](#)
- [AppExchange](#)
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### 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](http://opentext.com).

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<sup>2</sup> Not available in SaaS mode