

OpenText Exstream for Salesforce

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



Lower 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 business managers and customer agents to improve customer interaction. Generating all customer correspondence from a single source, Salesforce®, users can access, revise, repurpose and personalize content faster and with less effort.

Ensures compliance and quality

Users can match the message to the customer and situation. They 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 the business process.

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.** OpenText manages and runs the technology in a public cloud.
2. **Enabler mode.** Existing OpenText™ Exstream™ users can connect seamlessly to the platform wherever it is installed.

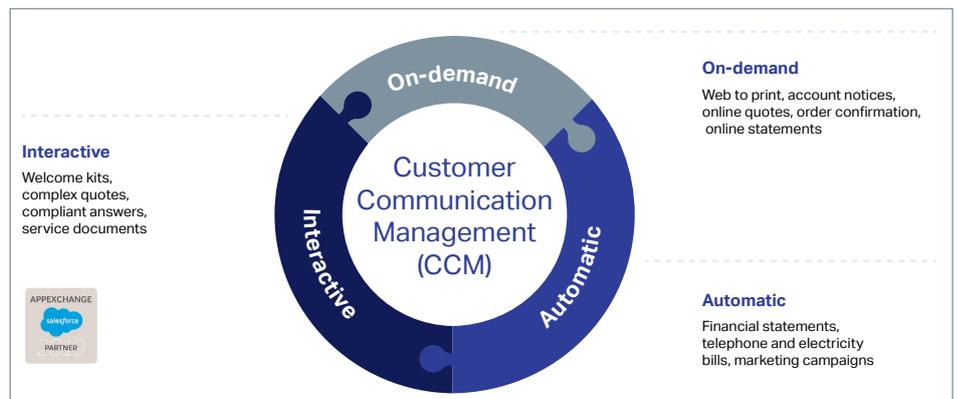
Optimizes sales, marketing and services

The document generation solution brings together the industry's leading customer communication management (CCM) product family from OpenText and Salesforce Customer Relationship Management 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 postprocessing options. Organizations can save correspondence to a standard file system repository, such as OpenText™ Extended ECM for Salesforce®, backup server or business system (e.g., Salesforce) 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



Source: The Forrester Wave: Document Output for Customer Communications Management, Q3 2014

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 and Service 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	Allows users to edit templates and generated correspondence in Microsoft® Word; includes electronic signatures as a standard feature so organizations are not required to purchase and integrate third-party software applications
Enabler mode	Enables users to realize the benefits of the Exstream platform; requires Communication Server 16.4

[Salesforce solutions](#)

[AppExchange](#)

[Learn more](#)

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](https://www.opentext.com).

Connect with us:

- [OpenText CEO Mark Barrenechea's blog](#)
- [Twitter](#) | [LinkedIn](#)

Salesforce, Sales and Service Cloud, and others are trademarks of salesforce.com, inc., and are used here with permission.