



# A Cloud Solution for Document Generation

As organizations migrate from on premises to hosted business systems, they face the challenge of finding a cloud-based document generation solution with enterprise-grade functionality.

Even small and medium businesses generate a wide range of high-volume customer correspondence related to sales, marketing, and customer service activities, such as proposals, quotes, contracts, direct mail, web offers, order confirmations, and written follow-ups to phone inquiries.

Most of these organizations have very sophisticated processes for designing, producing, managing, and maintaining customer correspondence. They also have to deliver this correspondence across a multitude of channels: print, email, SMS, web, mobile, social, and others. To complicate matters even further, composing a single piece of customer correspondence often requires gathering data from several on premises or hosted business systems, such as customer relationship management (CRM), and repositories.

While there are many cloud-based document generation systems on the market, most are actually point solutions targeted at single use cases or platforms.

OpenText, however, offers a comprehensive, Customer Communications Management (CCM) cloud solution that functions as a single source for document generation across all use cases, channels, technology platforms, and business systems.

## What Sets OpenText Apart

OpenText Communications Center CRM (CC CRM) document generation solution for the cloud offers functionality that no single competing cloud system can match.

Here are some of the features that put the OpenText cloud solution in a category of its own:

### 1. Comprehensive out-of-the-box CCM functionality

For organizations with sophisticated document processes looking to enable Line of Business users without added IT overhead, CC CRM comes with a full range of post-processing options so organizations can save their correspondence to a standard file system, repository, backup server, or business system (e.g., Salesforce®), send out correspondence in email format, or upload it in batches to a print shop via FTP.

## FEATURES SUMMARY

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- *Comprehensive out-of-the-box functionality*
- *True multi-channel capabilities*
- *Built-in adapters to popular business systems*
- *Multilingual support*
- *Interactive document generation*
- *Integrated electronic signatures*
- *Device agnostic solution*
- *All-version support for Microsoft® Word*
- *Multi-facitated data visualization tools*

## 2. True multi-channel capabilities

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

## 3. Built-in adapters to popular business systems

OpenText offers out-of-the-box integration with Salesforce®, Oracle® Siebel, Oracle Fusion, SQL Server® databases, and Microsoft® Excel®, allowing organizations to gather data from multiple sources, at the same time.

## 4. Multilingual support

OpenText currently supports 10+ languages, helping global organizations communicate with customers around the world.

## 5. Interactive document generation

With Interview Mode switched on, users receive contextual suggestions throughout the document creation process. Suggestions may involve document type, structure, content selection, layout, and more.

## 6. Integrated electronic signatures

With electronic signatures as a standard feature, organizations are not required to purchase and integrate third-party software applications. With the OpenText, organizations can collect customer signatures on their preferred device (e.g. tablet) and technology platform (e.g. Apple®, Android™, Microsoft).

## 7. Device agnostic solution

The OpenText solution is not tied to a specific technology platform so users can access it from their Apple iPads®, Android tablets, Windows PCs, and other computing devices.

## 8. All-version support for Microsoft® Word

Since Office Open XML (OOXML) is one of the supported output formats, users can easily edit templates and generated correspondence in Microsoft Word.

## 9. Out-of-the-box data visualization tools

Standard functionality includes tools for inserting graphical representations of customer data (e.g., tables, charts, and graphs) into correspondence.

## Bottom-Line Benefits

Organizations can derive significant business value from adopting a hosted document generation solution by OpenText. Here are several key benefits:

### Lower costs

Instead of paying to maintain a collection of cloud-based point solutions, organizations can save money by standardizing on a single hosted solution for all customer correspondence, including electronic signatures.

### Control over where data is hosted

While the standard hosting option is Amazon, the open architecture of the OpenText solution allows it to be hosted anywhere. Organizations concerned with data privacy or compliance issues can choose an appropriate local host to ensure that their data never crosses an international border.

### Faster communication

Organizations can take advantage of OpenText enterprise functionality to quickly design customer correspondence templates and generate millions of personalized documents per day.

### Higher efficiency

Organizations that use several partial solutions simultaneously must maintain document templates in each system, which is a time-consuming, inefficient process that is likely to yield inconsistent communications. Standardizing on a single source for all customer correspondence streamlines the whole process and eliminates duplication.

### Better customer service

A single-source solution greatly simplifies cross-channel customer support so organizations can deliver timely, appropriate correspondence. With so many channels to serve, a simple customer service request can trigger a very complicated correspondence process, potentially involving several different teams handling social media, service and support, shipping, etc. It's important not to get any wires crossed.

While many cloud vendors continue to offer partial solutions, mostly targeted at small businesses, OpenText alone can deliver a comprehensive, enterprise-grade suite of document generation tools in the cloud.