

Newgen's Contextual Content Services Platform for Salesforce



Overview



Ensuring better customer relationships and experience requires Salesforce users to access information easily and securely. This includes accessing a diverse variety of documents in various formats.

However, rather than focusing on client value, most organizations' employees spend a significant amount of time chasing down the right documents and coordinating between teams.

This leads to low productivity, limited collaboration, and a poor customer experience.

Salesforce users can overcome these challenges and enable a single source of truth by connecting Newgen's Contextual Content Services Platform with their application. The integration enables end-to-end content management, thus bridging content silos and offering a unified view to users.

Challenges Faced by Salesforce Users



- Limited content management capabilities
- Inability to access and retrieve the right content at the right time
- Low user productivity and limited collaboration
- Different document versions resulting in content duplication







Newgen's Contextual Content Service Platform for Salesforce



Newgen OmniDocs Contextual Content Services Platform, part of NewgenONE Digital Transformation Platform, seamlessly integrates with Salesforce. The integration enables users to access and leverage the platform's extensive content management capabilities directly from the Salesforce interface.

The platform streamlines content storage, management, access, control, and utilization. It allows users to maximize their Salesforce investments by bridging content silos, providing a 360-degree view and unified access to content, and making the users contextually aware while ensuring enhanced compliance and collaboration.

The platform enables:

-  **Content Lifecycle Management**
Streamline content management by capturing content from multiple sources, classifying it with metadata, surfacing it in frequently used applications, defining retention rules, and disposing of content when required.
-  **Security and Monitoring**
Assign user rights at file, folder, and cabinet levels and metadata-driven rights for enhanced security. Monitor users' activities, capture audit trails, and generate system reports for detailed insights.
-  **Collaboration Among Users**
Using a centralized repository, users can collaborate while avoiding content duplication and managing document versions. Annotations and notes can also be used to collaborate, and password-protected content can be shared.
-  **Integration with Low-cost Storage Services and Productivity Apps**
Utilize low-cost storage services like Amazon S3 Glacier and Microsoft cold storage to safely transfer and store the less critical, not-so-frequently used data. Integrate with productivity applications, including MS Teams, MS Outlook, SharePoint, and SAP, through web services and APIs.
-  **Compliance and Governance**
Manage the document lifecycle while ensuring better compliance and governance. The platform is ISO, and DOD certified to meet various regulatory requirements.

Business Advantages



Enhanced content visibility

360-degree view of customers and prospects-related content



Unified access

Easy access to document and record management capabilities through an intuitive user interface to ensure a single source of truth



Higher productivity

Secure and seamless collaboration across applications and organization, breaking down content silos



Improved process efficiency

Fast retrieval of documents based on user-defined metadata and content-based search, resulting in shorter turnaround time

Better SLA adherence

Better control over enterprise-wide content, resulting in enhanced compliance and SLA adherence

About Newgen

Newgen is the leading provider of a unified digital transformation platform with native process automation, content services, and communication management capabilities. Globally, successful enterprises rely on Newgen's industry-recognized low code application platform to develop and deploy complex, content-driven, and customer-engaging business applications on the cloud. From onboarding to service requests, lending to underwriting, and for many more use cases across industries. Newgen unlocks simple with speed and agility.

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