

Unity for Salesforce

Open up your enterprise to the Salesforce cloud

Extend the Salesforce Cloud

Over 150,000 companies in financial services, insurance, government, retail, manufacturing, healthcare and other industries use the industry-leading Salesforce customer relationship management (CRM) platform for their core sales, marketing, and service business processes. The robust scalable cloud-based Salesforce platform significantly speeds up the rollout and management of their CRM applications but can present challenges when Salesforce users need information and documents from other, often on-premise, systems. Unity for Salesforce addresses these challenges by securely extending the Salesforce cloud with consolidated data and documents from on-premise or other cloud content management systems, databases, and ERP, case, and line of business systems, from any vendor.

Give Salesforce Users the Whole Story

The complete profile of a customer may include content and interactions that go back many years-often from before Salesforce was deployed and stored in other systems and repositories. Unity for Salesforce gives Salesforce users a complete unified customer profile and history that includes content and documents from content systems, line of business applications and other systems of record.

Make Salesforce Users Even More Productive

Users lose momentum and business processes slow down every time a user leaves Salesforce to work in another application. Unity for Salesforce minimizes these disruptions. Unity maximizes the time users spend in Salesforce by giving them access to critical content, data and documents from other systems without leaving Salesforce.

Intelligent Enterprise Search

Unity for Salesforce brings intelligent enterprise wide search to Salesforce. Users securely search content, metadata and application data in multiple on-premise or cloud databases and repositories anywhere in the enterprise, without leaving Salesforce.

With Intellective' Unity for Salesforce:

- Associate documents, workflow and data from other systems with Salesforce elements like opportunities and accounts
- Keep users in Salesforce and its familiar user interface when they need data and documents from other systems
- Augment Salesforce's content capabilities with robust full-lifecycle content management
- Reduce storage costs by using existing storage for content and documents instead of purchasing additional storage from Salesforce
- View, annotate and update data and documents stored in other systems. Drag and drop on the Salesforce screen to add documents to content repositories
- Rapidly search on-premise or cloud-based content repositories to find and access documents that speed up Salesforce tasks
- Automatically execute contextual queries across multiple systems and repositories, based on Salesforce elements like customer, account, case or contract
- Enforce role-based entitlements that leverage existing security systems, so users see only what they're supposed to
- Leverage Intellective's consulting and support services to rapidly deploy Unity for Salesforce



Make Salesforce Users Even More Productive

Quickly locate and leverage content and data from your line of business, legacy and content management systems without leaving Salesforce



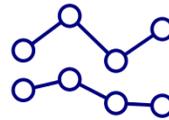
Connect and Extend

Easily extend Salesforce in the cloud with data and content from on-premise content management systems, ERP, case, and line of business systems without extensive coding, integration or Salesforce customization.



Accelerate

Accelerate business processes by giving Salesforce users the data, content and documents they need-regardless of where the content is located-without leaving Salesforce.



Manage Content

Leverage on-premise or cloud-based content systems to provide full-lifecycle content management from Salesforce. View, annotate and update documents stored in multiple content systems and repositories.



Search

From Salesforce, use the Unity for Salesforce Intelligence Engine to quickly locate data and documents stored in multiple databases, repositories and systems.



Work with Large Files

Enable Salesforce users to work with files and attachments that exceed the Salesforce file size limits.



Mobile

Access and use Unity for Salesforce features and capabilities anywhere and from any device, along with native Salesforce capabilities.



Collaborate

Collaborate with co-workers and participate in company workflows managed by other line of business systems-all in the context of Salesforce activities.



Simplify Security

Manage a single secure connection between Salesforce in the cloud and Unity for Salesforce instead of exposing multiple on-premise systems to the internet.

With Intellective Unity:

- Rapidly configure and deploy new applications across multiple line of business applications and repositories to speed up business processes
- Easily connect BPM, case, workflow and other LOB systems and content repositories
- Quickly integrate new systems with existing systems following a merger or acquisition
- Modernize mainframe-hosted applications and infrastructure with a modern adaptive user interface
- Optimize and tune business processes with integrated actionable analytics and Advanced Analytic Visualizations like Sankey Diagrams
- Extended Unity's analytics with HUE (Hadoop User Experience) and other analytics tools
- Search diverse data and content repositories to quickly find all data, documents and other content needed for a job task
- Deploy a unified user interface with normalized data to reduce complexity, training and operational costs
- Enforce role-based entitlements that leverage your security systems, so users see only what they're supposed to
- Leverage Intellective consulting and support services to rapidly deploy Unity

For More Information

For more information on how Salesforce for Unity can help your company achieve its goals, please contact your Intellective representative or Intellective Business Partner, or visit: www.Intellective.com

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