Hyland for Salesforce

Empower smarter decisions with seamless access to high-value content supported by a cloud-native content management system

Access content directly from Salesforce

Salesforce is central to managing customer, vendor and partner relationships, but the data alone doesn't tell the full story. Business-critical documents often live outside of Salesforce, forcing users to search across disconnected systems and slowing down decision-making.

Hyland for Salesforce integrates the power of Hyland Content Innovation Cloud™ directly into the Salesforce interface, giving users instant access to the documents and content they need — right where they work. Users can view, search and retrieve documents directly from Salesforce records, import content without switching applications, and surface contracts, invoices and communications in context with customer or vendor data. This seamless experience eliminates the need to hunt through email inboxes, shared drives or legacy systems — saving time and improving responsiveness. By mapping Salesforce field values to Hyland keywords, users can quickly locate relevant documents and make informed decisions faster.

Gain a complete view of your business relationships

Disconnected content leads to incomplete insights and slows down business processes. Hyland for Salesforce provides a holistic view of all related information, enabling faster, more informed decisions and improved customer and vendor interactions. Whether accessed from Salesforce or other integrated systems, content is automatically updated and aligned with your organization's retention and compliance policies. This ensures users are working with the most current documents, reducing errors and improving operational efficiency.

For example, when responding to a customer inquiry, staff can instantly surface related documents alongside Salesforce data, enabling quicker and more accurate responses. Automated retention options also ensure documents are purged when required, helping maintain compliance without manual effort.

Simplify integration with a cloud-native architecture

Hyland for Salesforce is built on a modern, cloud-native foundation that supports native integration using Salesforce Lightning Web Components (LWC). It delivers enterprise-grade performance and security via Hyland's Unified Content Enabled Backend (UCEB), and enables rapid deployment through Salesforce AppExchange and Hyland's cloud infrastructure.

Configuration is low-code and intuitive, reducing IT burden and accelerating time-to-value. Built-in mapping between Salesforce data and Hyland concepts eliminates the need for custom API development, making the integration scalable and cost-effective. This familiar interface allows organizations to reap the benefits of content access without disrupting existing workflows or requiring extensive training.

Enhance Salesforce with intelligent content capabilities

Hyland for Salesforce lays the groundwork for advanced capabilities that go beyond simple document access. Organizations can leverage intelligent capture and classification to automate content ingestion, AI-powered knowledge discovery to surface insights and agentic workflows to streamline business processes. By embedding content intelligence into Salesforce, users unlock deeper insights and drive smarter, faster decisions. These capabilities help organizations stay competitive by enabling proactive customer service, efficient operations and strategic growth initiatives.

✓ Who benefits?

Hyland for Salesforce is designed for a wide range of users and industries:

- **Business and operations leaders:** VP of sales, customer service directors, operations managers

- **IT leaders:** CIOs, IT directors, system administrators

- **Industries:** Small- to enterprise-sized organizations across all sectors

These users benefit from streamlined access to content, improved decision-making and enhanced collaboration across departments.

↗ Visit **Hyland's Salesforce integration page** or explore the solution on the Salesforce AppExchange to see how Hyland for Salesforce can transform your content experience.

About Hyland

Hyland empowers organizations with unified content, process and application intelligence solutions, unlocking profound insights that fuel innovations. Trusted by thousands of organizations worldwide, including many of the Fortune 100, Hyland's solutions fundamentally redefine how teams operate and engage with those they serve. For additional information on the Hyland platform and services, please visit Hyland.com.

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