



Salesforce integration for Higher Education

Enhance efficiencies, decision-making and engagement

Many educational institutions leverage Salesforce as their primary CRM solution for marketing to existing students as well as for alumni fundraising, advancement, and engagement. But the data is only part of the information your staff needs to make informed decisions. As a result, staff often need to search for information elsewhere — including physical files and cabinets, email inboxes or other repositories.

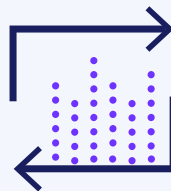
The OnBase Integration for Salesforce for Higher Education helps digitize your school's workplace with a seamless connection to Hyland's industry-leading content services capabilities, providing instant access to critical information alongside the corresponding Salesforce records.

Users can import, retrieve and view electronic documents and content directly from their Salesforce screens to enhance efficiencies across a wide range of use cases, including admissions and recruitment, student advising and communications, alumni/donor engagement and case management.

The solution is compatible with Salesforce Admissions Connect to streamline admissions management and accelerate decisions to applicants. Admissions staff can quickly gain a complete view of the student as related information is surfaced next to the Salesforce record, eliminating time-consuming searches across multiple repositories for relevant documents and information.



Access related documents and content directly from Salesforce



Gain a complete view of information for students, donors and alumni



Integrate seamlessly with a familiar interface

Highlights

- Provides access to related documents and content directly from Salesforce
- Enables a complete view of information for students, donors and alumni
- Accelerates workflow with Salesforce mobile app for task execution and to import documents directly into content repository
- Checks all the necessary boxes for document security and retention
- Seamlessly integrates and scales across campus departments and businesses

Use cases

- Enrollment management; admissions and recruitment
- Donor management; advancement
- Student advising, communications and marketing; student experience management
- Case management

Impact

- Increases efficiencies by eliminating time-consuming searches for information across repositories
- Accelerates processes and workflow with a complete view of information
- Enhances student engagement and satisfaction with faster responses and decisions
- Extends the value of existing technology investment with seamless integration to leading content services capabilities

➔ Learn more about [Hyland's solutions for higher education.](#)

About Hyland

Hyland uniquely empowers organizations with unified access to AI-enabled enterprise content and unstructured data across repositories, unlocking profound insights that fuel innovations – fundamentally redefining how they operate and engage with those they serve. The pioneer of the Content Innovation Cloud™ — a unified content, process and application intelligence platform — Hyland is trusted by thousands of organizations worldwide, including more than half of the Fortune 100.