

# SeeUnity Microsoft Dynamics™ Solutions

Connect Your ECM Repositories to Microsoft Dynamics CRM 2013™

## SEEUNITY DYNAMICS INTEGRATION

Microsoft Dynamics is meant to simplify your case management. Don't let multiple ECM systems add unnecessary steps. SeeUnity Dynamics Integration brings all of your repositories together and available from one interface: Microsoft Dynamics. This means that your employees are empowered through Microsoft Dynamics to search and access all of your documents stored one or more ECM systems.

### SeeUnity Integration for Microsoft Dynamics CRM 2013

The screenshot displays the Microsoft Dynamics CRM 2013 user interface. At the top, the navigation bar shows 'Microsoft Dynamics CRM' and 'SERVICE' with a dropdown menu. The main content area is titled 'Service requested (sample)'. Below the title, there are tabs for 'Identify (Active)', 'Research', and 'Resolve'. The 'Identify (Active)' tab is selected, showing a list of actions: 'Find Customer' and 'Find Case'. The 'Summary' section on the left provides details for the case, including 'Case Title: Service requested (sample)', 'ID: CAS-01028-Q48917', 'Subject: Maintenance', 'Customer: Jim Glynn (sample)', 'Type: Request', and 'Origin: Web'. The 'RELATED DOCUMENTS' window is open, showing a file explorer view of a network drive with various folders and files. The 'CUSTOMER DETAILS' section on the right shows information for 'Jim Glynn (sample)', including company, email, mobile, and business phone numbers. The 'RECENT CASES' section at the bottom right shows a list of recent cases with columns for 'Status' and 'Case Title'.

SeeUnity Integration for Microsoft Dynamics gives you access to:

- Browse, access, search, manage, and edit documents directly from dynamics!
- Faster browsing with no page refreshes when browsing or searching for content
- Search and find cases and related documents across one or many repositories
- Attach document links from documents to emails initiated within Dynamics
- Context sensitive menus offer only relevant actions based on document state in native repository, such as check-in/check-out, view profile, or history
- Open and edit documents in Office Online
- Drag and drop to move or import documents to external repositories
- Preview documents in hover view

 SeeUnity

The Content Integration Experts

info@seeunity.com

970-776-8300

5245 Ronald Reagan Blvd. STE 200, Johnstown, CO 80534

  
GOLD CERTIFIED  
Partner

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## SET RULES FOR AUTOMATIC DOCUMENT HANDLING

Having multiple systems or repositories where documents are stored can complicate case management. With multiple repositories and no synchronization solution employees are left to manually update documents, changes, or archive documents across repositories, increasing the time required to manage cases and increasing the chance for errors.

SeeUnity's Echo Content Management allows you to create rules to help you seamlessly control documents throughout the case management cycle. You can configure Echo Content Management to apply different rules at each stage of the case management cycle in Dynamics. Rule options to apply to documents include bi-directional synchronization of document changes and additions, archival of documents, or updating metadata appropriately across your repositories.

### *How Can Echo Content Management Help?*

- Access all of your documents from within Dynamics
- Sync category metadata across repositories to ensure seamless integration
- Easily create case related items by mapping metadata to different objects

## POSSIBLE DYNAMICS USE CASES

- An employee is newly involved with a complaint and would like to review all of the relevant documents associated with the complaint. They access the related documents stored in external repositories directly from the case in Microsoft Dynamics using SeeUnity's Dynamics Integration. Any documents they edit or add are automatically reflected within external repositories and other users of the Dynamics Integration will see the changes reflected.
- An employee closes a case in Microsoft Dynamics. Echo Content Management can be configured to capture the close event and trigger a host of possible options to be applied to each repository involved including: set all related documents to read only, declare as a record, update metadata, remove document, or archive to a repository of choice.

## ABOUT SEEUNITY

SeeUnity has over 40 combined years of experience with successful integration, migration, synchronization, and mobility of ECM systems. Our products and solutions have helped over 300 organizations globally take control of their ECM systems. For more information about SeeUnity, visit [www.seeunity.com](http://www.seeunity.com)

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