

SeeUnity Solutions for Microsoft Dynamics

DATA SHEET

Integrate or Synchronize with Microsoft Dynamics

SeeUnity has a full suite of comprehensive solutions to help you make the most of your OpenText Content Server environment. Whether you need to migrate all of your content to Content Server, you are using other ECM systems in conjunction with Content Server and need to synchronize your content between the two, you want to integrate Content Server with another ECM system like SharePoint, or you need a mobile app that supports Content Server, we have got you covered!

Fusion Content Integration

Provide a native ECM user experience that will allow your employees to access and manage content across one or more systems from within a single interface.

SeeUnity Integration for Dynamics Gives You Access to:

Map and synchronize metadata and security across repositories

- Browse, access, search, manage, and edit documents directly from Dynamics
- Faster browsing with no page refreshes when browsing or searching for data
- Search and find leads and related documents across one or many repositories
- 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



BUSINESS BENEFITS

- Improve ease of access to all of your content
- Increase user satisfaction
- Maintain a single source of the truth
- Support information governance plans
- Fuse all content into one interface
- Increase cross system collaboration

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Echo Content Synchronization

Having multiple systems or repositories where documents are stored can complicate lead 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 leads and increasing the chance for errors.

SeeUnity's Echo Content Synchronization allows you to create rules to help you seamlessly control documents throughout the lead 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.



Echo Content Synchronization - Features

Echo Content Synchronization is a robust synchronization solution to help you automate your content management.

- Publish documents from your repository of choice to external sources
- Bi-directionally synchronize documents across repositories
- Archive documents to your repository of choice and optionally delete or replace documents with a link or stub
- Map and synchronize metadata and security across repositories Configure rules to be initiated based on triggers
- Schedule or automatically manage document synchronization
- Utilize native repository APIs to ensure compliance and maintain audit and history information

CONNECT TO ALL YOUR BUSINESS APPLICATIONS



Alfresco
Amazon S3
Anaqua's AQX
Anaqua's PATTSY WAVE
Azure Storage
Box
Content Server

Dropbox
Documentum
Dynamics
eDOCS
Exchange
File Shares
Filevine

HighQ
Google Drive
iManage
Kira Systems
Litera Transact (Doxly)
Microsoft 365
NetDocuments

PacerPro
Opus2
OneDrive
Safelink
Salesforce
SharePoint
SimplyAgree
Teams



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