

## Echo Integrations for AQX® – Matter Management & Finance Systems

### Streamline IP Management Workflow with Automated Content Records Sync for AQX® and Matter Management/Finance Systems

Is your firm evaluating ways to improve operational efficiencies and reduce costs? Integration technologies are vital in today's world. They help keep remote workers, clients, and business partners connected and working productively.

Now you can automatically sync records for documents, invoices, and related matter content between AQX and Aderant, Legal Tracker, Mitratch, SimpleLegal, T360, 3E, Onit, and more.

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#### Build in Efficiency – Integrate and Automate

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**Echo Content Synchronization (Echo)** is an API-based enterprise content synchronization product designed to automate processes, support internal and external collaboration, and help maintain content governance.

**Echo Automate** works in tandem with Echo, automatically detecting changes, syncing mapped metadata, and even creating matter records, with no user or admin needed.

#### Manage Content Records - between applications

Configure sync rules based on metadata mapping and triggers. Syncs are automatically initiated, while IT maintains full administrative oversight using the Echo Management Studio. Schedule syncs every one minute or as preferred.

- Automatically sync matter metadata **one-direction** from AQX into your matter management system to enable secure and efficient collaboration.
- ↻ **Changes** to content records from within AQX will be automatically **synced** to the matter management system, keeping that content up-to-date for users. Changes to the records or documents in the matter management system will not be synced back to AQX.
- **Publish content records**, such as posted invoices, from your matter management system to AQX. Eliminate double data entries, save time, avoid errors, and provide collaborators with timely and up-to-date information.

#### Automate Processes

Echo Automate detects new matter records as they are created in AQX and looks in the matter management system for the corresponding matter. The two sites are linked, and an ongoing records sync is started. If no matching record is found, Echo Automate creates one, links the two sites, and initiates the sync.

#### Report and Notify

Configure email notifications for admins to receive metadata sync confirmations and error reports. Retain audit and sync history data with detailed reporting.



**Provide up-to-date matter and financial information needed to make decisions**

**Eliminate manual processes, double entry, and errors with automated processes**

**Improve user efficiency with access to needed content**

**Enable secure content collaboration**

LET US SHOW YOU  
THE POSSIBILITIES



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