

Echo Sync for Legal Tracker

DATA SHEET

Streamline Content Management Workflow with Automated Records Sync for Legal Tracker and Your Other Essential Business Applications

Is your organization 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 securely sync records for documents, invoices, matters, and metadata between your business applications and Legal Tracker.

Build in Efficiency - Integrate and Automate

Echo Sync (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 content records, and even creating matter records, with no user or admin needed.

Manage Content Records - between applications (on-prem, hybrid, cloud)

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 another business application (DMS, HighQ, or other system) into Legal Tracker to enable secure and efficient collaboration.

↻ **Changes** to content records from within e.g., your DMS, will be automatically **synced** to Legal Tracker, keeping that content up-to-date for users. Changes made in Legal Tracker will not be synced back to the DMS.

→ **Publish content records**, such as posted invoices, from Legal Tracker to your other business applications to eliminate double 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 the DMS, HighQ, or other application, and looks in Legal Tracker for the corresponding matter. The two sites are linked, and an ongoing, one-way 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 data with detailed reporting.



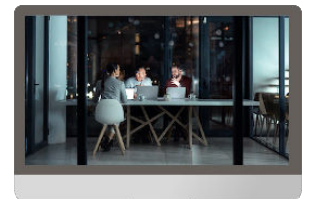
Provide up-to-date matter and financial information needed to make decisions

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

Enable efficient and secure collaboration

Improve user efficiency with access to needed content

CONNECT TO ALL YOUR BUSINESS APPLICATIONS



[Complete list of our connectors here, including:](#)

Amazon S3, Azure Storage, Box, eDOCS, HighQ, iManage, Litera, MS365, NetDocuments, Salesforce, Teams, 3E...