SeeUnity

An Anaqua Company

Integrate or Synchronize with Salesforce

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

SeeUnity Salesforce Integration

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

- Browse, access, search, manage, and edit documents directly from Salesforce

- 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 reopository, 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

SeeUnity Solutions for Salesforce

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 lead management cycle in Salesforce. 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	Dropbox	HighQ	PacerPro
Amazon S3	Documentum	Google Drive	Opus2
Anaqua's AQX	Dynamics	iManage	OneDrive
Anaqua's PATTSY WAVE	eDOCS	Kira Systems	Safelink
Azure Storage	Exchange	Litera Transact (Doxly)	Salesforce
Box	File Shares	Microsoft 365	SharePoint
Content Server	Filevine	NetDocuments	SimplyAgree
			Teams