OPENASSET + Unanet CRM by Cosential

Centralize your data and images with the OpenAsset and Unanet CRM Connector

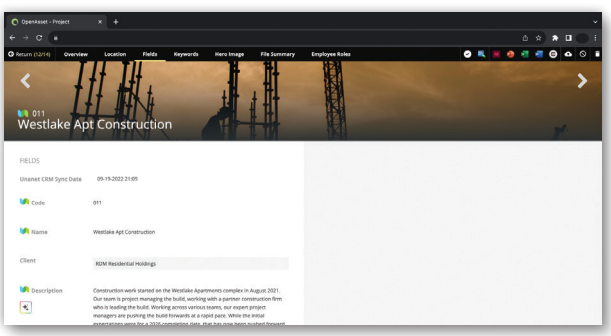
PRODUCTS

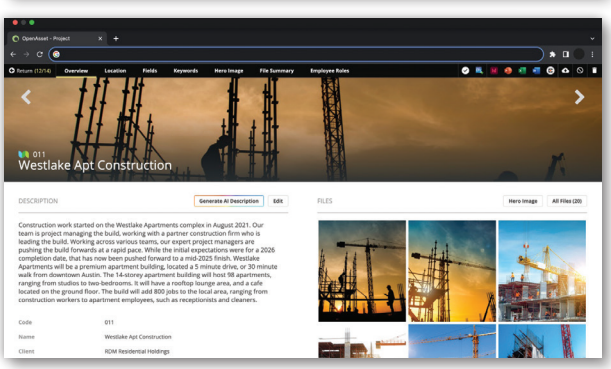
SOURCE

The Unanet CRM Connector, provided by OpenAsset, allows users to access digital assets and their accompanying data at any time and from any workflow, ensuring optimal efficiency and productivity. Firms can sync project and employee data from Unanet CRM into OpenAsset to auto-populate fields and keywords, as well as push images from OpenAsset into Unanet CRM.

Key Benefits

- Leverage your existing data in Unanet CRM to tag images at scale in OpenAsset.
- Access your Unanet CRM project and employee records from OpenAsset.
- Push data from Unanet CRM into custom fields in OpenAsset, leveraging Unanet CRM as your single source of truth.
- Select and send images from OpenAsset into Unanet CRM for use in Publisher.





What the Integration Delivers

- **Filtering on OpenAsset approved Projects:** Create a filter to help select which projects to sync.
- **Automatically create a project in OpenAsset when created in Unanet CRM:** New projects in Unanet CRM matching predefined criteria will be created in OpenAsset.
- **Map Unanet CRM fields to OpenAsset project fields or keywords:** Leverage data in Unanet CRM to build project portfolios and taxonomies.
- **Map Unanet Employee information to OpenAsset employee fields:** Push subsets of employee data stored in Unanet CRM into OpenAsset to build out employee profiles.
- **Map Employee Roles in Unanet CRM to OpenAsset:** Once configured, the system will auto-generate employee experience in OpenAsset based on project assignments in Unanet CRM.
- **Select and Send Images from OpenAsset to Unanet CRM:** Choose images in OpenAsset and send the image and select metadata directly into Unanet CRM Projects or Personnel Records.
- **3 Hour Sync Cadence for Projects and Employee Data:** The system will update projects and employee data every 3 hours with just a few clicks.

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Learn more about our Unanet Connector.