

openasset + Unanet[™]

CRM by Cosential

Centralize Your Data and Images with the OpenAsset & Unanet CRM by Cosential Connector

OpenAsset is a project-based Digital Asset Management (DAM) solution that helps users to store, find, and use their marketing images more easily. With the seamless integration provided by OpenAsset, users can 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:

1. Leverage your existing data in Unanet CRM to tag images at scale in OpenAsset
2. Access your Unanet CRM project and employee records from OpenAsset
3. Push data from Unanet CRM into custom fields in OpenAsset, leveraging Unanet CRM as your single source of truth
4. Select and send images from OpenAsset into Unanet CRM for use in Publisher
5. Streamline workflows and create more efficient processes

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.

