Fox Entertainment Group Establishes Collaboration Between Sales and Legal Teams by Utilizing SeeUnity's Fusion Content Integration Product

Salesforce and eDOCS Integration Streamlines Deal Approval Process

American Entertainment Company

The Fox Entertainment Group, a subsidiary of 21st Century Fox, is an American entertainment company that operates through four segments, mainly filmed entertainment, television stations, television broadcast networks, and cable network programming. The company is wholly owned and controlled by the American media conglomerate 21st Century Fox, which is owned and chaired by Rupert Murdoch, since his company News Corp acquired all the stock of Fox. The transaction was completed on March 12, 2005. The division was part of the renamed 21st Century Fox after it had spun off its publishing divisions into the newly formed "New" News Corporation in 2013 as part of a corporate re-organization.

Challenges

Fox Entertainment Group (Fox) is comprised of many corporate divisions and subsidiaries, all with their own unique document management challenges. Fox utilizes an OpenText eDOCS repository (eDOCS) that serves 700 users, houses over 6 million documents within 7 libraries, and supports over 14 application integrations.
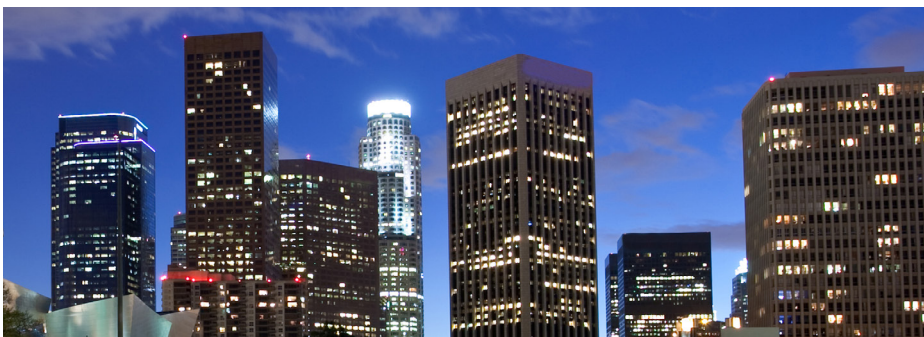
SALESFORCE INTEGRATION WITH eDOCS
The Fox Television Distribution division (TVD) and legal teams wanted to create a centralized, cloud-based system that would allow for detailed visibility into the sales pipeline, establish collaboration between the sales and legal teams, and streamline the deal approval process.

The TVD IT group chose Salesforce as their CRM platform. To fully take advantage of this new system, a key requirement was the ability to access the underlying contracts and amendments for all of the customers and accounts. The legal group that negotiated the TVD agreements housed the working agreements in eDOCS, but the fully executed documents were paper copies.

Solution

A scanning vendor was brought in to scan and index the entire file room. Later, those files were ingested into eDOCS. All of the documents had an old Agreement ID from the previous system, which made it easier to tie desired metadata to the agreements. Microsoft's SSIS was used as the ETL (Extract, Transform, and Load) tool to sync the data to eDOCS.

Industry

Film, Television

About the Project

- OpenText eDOCS DM
- Salesforce CRM
- 6000 files in eDOCS
- SeeUnity's Fusion Content Integration product embedded in Salesforce UI to expose eDOCS

"For the UI, we went with a longtime development partner of ours and of OpenText, SeeUnity, for their Fusion product. Outside of having great integration solutions for eDOCS and other products, their professional services team is top notch". – Michael Burch, Executive Director, Secure Document Management Services, Fox Entertainment Group

Challenges

- Needed to establish collaboration between the Television Distribution group and legal teams
- Wanted to streamline the deal approval process
- Required a centralized, cloud-based system that would provide visibility into the sales pipeline
- Required secure integration solutions
- Preferred versatile solutions to support future growth

For the Salesforce integration, two solutions were needed: an ETL to connect to Force to sync the Salesforce data, and a way to present the eDOCS content in the Salesforce user interface (UI). Fox already had a global license and the infrastructure to support Informatica, so this was used as the ETL. SeeUnity, a longtime development partner for Fox and a technology partner with OpenText, was chosen to provide the integration to connect eDOCS and Salesforce. SeeUnity's Fusion Content Integration product (Fusion) provides secure access into Fox's eDOCS repository from within the Salesforce UI with full eDOCS native functionality.
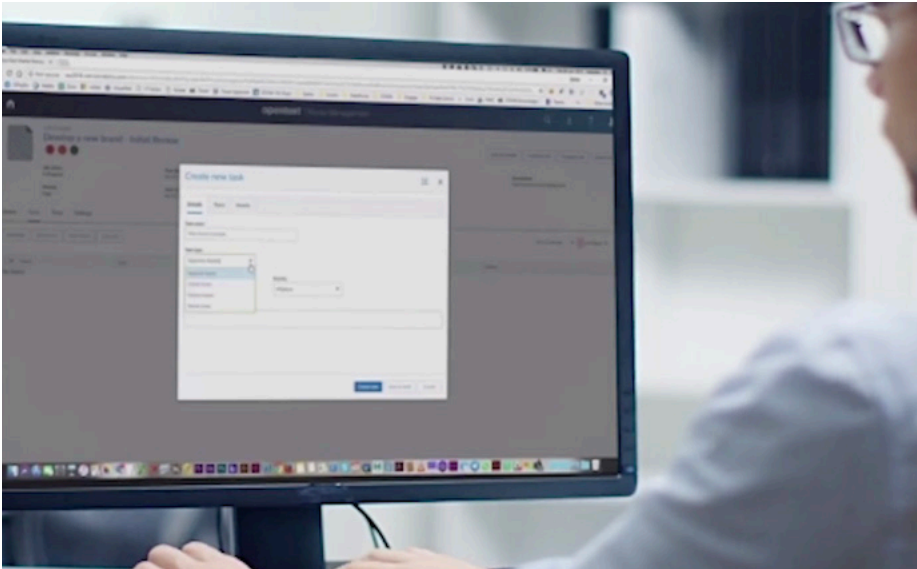
SeeUnity's Fusion embedded in the Salesforce UI to expose the fully functional eDOCS

Benefits

With the integration in place, this new process allows attorneys to upload the fully executed agreements to eDOCS and profile the document with the integrated Salesforce Agreement ID, which auto-populates the customer information in Salesforce, their region and territory, and media type. The process creates a relationship between the agreement and Salesforce customer, which is now accessible through the SeeUnity Fusion iFrame in the Salesforce UI. The sales and operational staff can now access and work with any related agreements housed in eDOCS from any tab in Salesforce (Account, Agreement, Customer). The teams can also upload content directly to eDOCS from the Salesforce UI.

"We're breaking down silos. Giving an executive or a lawyer the ability to quickly research and find information that sets precedents on a very critical decision makes all the difference." – Michael Burch, Executive Director, Secure Document Management Services, Fox Entertainment Group

Solution

Fusion Content Integration

Salesforce – eDOCS

- Securely surface eDOCS sales and contract data from within the Salesforce user interface
- Native eDOCS functionality: Browse, access, search, manage, and edit eDOCS content directly from Salesforce UI
- Upload documents to eDOCS and profile from within Salesforce
- Configure custom actions, such as linking agreements in eDOCS to the corresponding Salesforce customers and auto-populating Salesforce fields
- Scalable–flexible product with native connectors that support many business applications and repositories

Benefits

- Enable sales and legal team collaboration with secure integration of cloud-based CRM and on-premise DMS
- Workflow is streamlined, saving time and speeding up the deal approval process
- Work efficiently by accessing all relevant data via a single user interface
- Maintain Corporate Information Governance initiatives by keeping content in the repository of record
- Allows for future growth and new third-party application integrations

opentext™

eDOCS

SeeUnity™

We are content integration experts providing in-depth solutions to connect, sync, or migrate data across on-premise or cloud-based ECM solutions with external business applications. We're dedicated to improving workflow and business processes by extending applications and connecting people with content. SeeUnity supports a growing list of 20 connectors and provides comprehensive migration and synchronization tools to 500+ customers and 30+ partners worldwide. We proudly serve customers of all sizes, including Fortune 500 businesses, AMLaw 100 and 200 firms, and government entities.

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