

OpenText Content Management for Microsoft Dynamics 365 Finance and Operations

Connect content to Dynamics 365 workflows to simplify operations, boost productivity, enhance compliance, and enable secure, in-context collaboration



Benefits

- Securely manage finance and operations documents in one connected business workspace
- Connect siloed content directly into Dynamics 365 Finance and Operations
- Enable real-time access with role-based permissions
- Ensure one source of truth across business processes

Organizations face pressure to streamline financial and operational workflows, but legacy systems and disconnected content slow decision-making and increase compliance risk. By integrating OpenText™ Content Management with Microsoft Dynamics 365® Finance and Operations, companies can bridge the gap between content and process, allowing users to access and collaborate on documents within a single, secure workspace.

To streamline financial and operational processes, improve collaboration, and reduce risk, organizations need to securely connect business content with the systems where work happens. OpenText Content Management for Microsoft Dynamics 365 Finance and Operations bridges the gap between transactional data and the documents that support it—right within the Dynamics interface.

Delivering a unified approach to content and process, it helps teams manage and access the documents they need to complete tasks—faster, more accurately, and with fewer manual steps. The result? Better decisions, improved compliance, and a smoother flow of work across finance and operations.

Maximize the value of connected content

Unlock the full potential of integrated content management with OpenText Services to ensure fast deployment, optimized performance, and long-term success

- **Consulting Services** to guide implementation and integration strategy
- **Managed Services** to support ongoing operations and system performance
- **Learning Services** to empower users and admins with the right skills

With deep expertise in bridging content across multiple ERPs, OpenText Services helps enterprises:

- Accelerate straight-through processing and reduce manual exceptions
- Cut paper handling and audit preparation costs
- Improve cash flow and shorten payment cycles
- Eliminate vendor payment errors and strengthen supplier relationships

Take advantage of expert support designed to reduce complexity, minimize risk, and boost business impact from day one.

Securely manage financial and operational content

Documents like contracts, purchase orders, bank records, and reports are stored in a centralized, secure repository. Role-based access ensures the right people see the right content at the right time. Version control, audit trails, and collaboration features help distributed teams work confidently and in sync.

Bring siloed content into Dynamics 365 Finance and Operations

With transparent integration, users can access and manage documents for key processes directly within Dynamics 365. Supported entities include:

- Bank account
- Employee
- Customer
- Fixed asset
- Purchase order
- Purchase requisition
- Sales order
- Vendor

Each entity automatically creates a connected Business Workspace in OpenText Content Management, enabling structure, compliance, and lifecycle management from day one.

Enable instant access for every stakeholder

Whether you're in finance, procurement, operations, or project delivery, you can access relevant documents in real-time, without leaving the apps you use every day. Workspaces ensure that all related content is available, organized, and searchable across related business areas.

Trust one version of the truth

With deep integrations across systems like Microsoft Office 365®, Microsoft Teams®, SAP S/4HANA®, and Dynamics 365, your team always works from a single, consistent source of content, eliminating duplication, confusion, and delays.

Stay compliant and in control

Every document is governed from creation through retention and disposition. Built-in records management, metadata handling, and security controls help meet regulatory requirements, reduce legal exposure, and keep your content strategy future ready.

Help teams work smarter and faster

When content is scattered and disconnected from your business processes, it slows teams down, increases risk, and drains productivity. OpenText Content Management for Microsoft Dynamics 365 Finance and Operations solves this by embedding secure, organized content directly into your workflows so your teams can move faster and work smarter.

What sets OpenText apart is its deep integration of business content with your data, delivering intelligent tools for control, collaboration, and lifecycle management. It's more than just storage, it's a strategic asset that drives measurable business value.

Deployment options

Accelerate cloud strategies with OpenText cloud experts

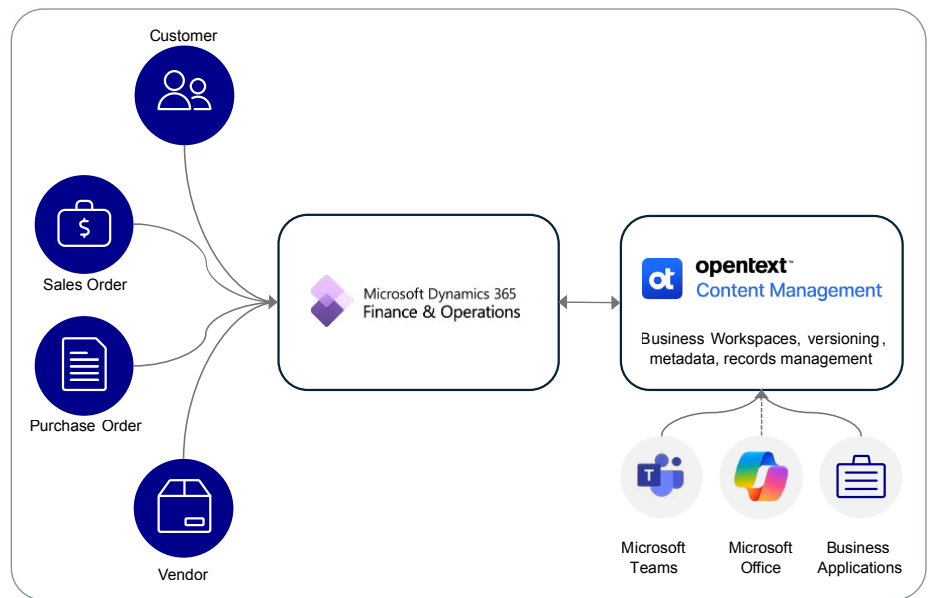
- OpenText Managed Private Cloud

Extend your team

- On-premises software, managed by your organization or OpenText

Run anywhere and scale globally in the hyperscaler cloud of your choice

- Hyperscaler cloud partners (OpenText Private Cloud, AWS private or public cloud, GCP private or public cloud, Azure private or public cloud)



Feature/Component	Description
OpenText Content Management Integration	Seamlessly connect structured business processes with unstructured content inside Dynamics 365 Finance and Operations.
Business Workspaces	Automatically create event-driven workspaces that store, manage, and relate documents to core Dynamics entities.
Enterprise-grade document control	Apply versioning, metadata tagging, audit trails, and access control to ensure governance and compliance.
Microsoft Teams and Office 365 integration	Enable collaboration and co-authoring directly from Teams, Outlook, and Office apps, without leaving Dynamics.
Preconfigured templates	Accelerate workspace creation with predefined structures for common processes like P2P, Sales, or HR.
Role-based access and security	Ensure only authorized users can access sensitive content based on business roles and policies.
Unified content access widget	Embed the OpenText Content Management UI directly in Dynamics 365 for seamless access, navigation, and interaction with content across processes.
Lifecycle and records management	Automate retention, archiving, and deletion policies to meet audit and compliance requirements.
Process-specific document handling	Streamline document handling with drag-and-drop, linking, and retrieval across supported entities like Customer, Sales Order, and Vendor.
Workspace relationships	Bridge related business workspaces and processes, enhancing visibility and optimizing navigation between business entities (e.g., Sales Order ↔ Vendor).

Resources

Read more about OpenText Content Management for Microsoft Dynamics 365 Finance and Operations on Microsoft AppSource

[Read more ›](#)

OpenText Content Management (Extended ECM)

[Learn more ›](#)

OpenText Content Cloud integrations for Microsoft 365

[Learn more ›](#)

Calculate your potential savings

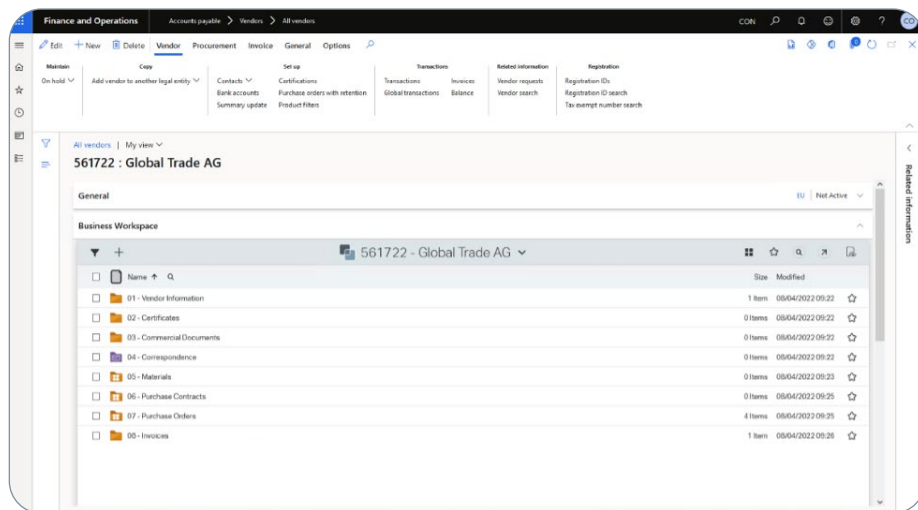
[Learn more ›](#)

Fueling financial processes with relevant content

[Read the blog ›](#)

Watch an overview of OpenText integrations for Microsoft Dynamics 365

[Watch the video ›](#)



Connect structured content directly into Dynamics 365 Finance and Operations.