Salesforce[®] Integration for Laserfiche[®]

Cities Digital's Salesforce[®] Integration brings Salesforce CRM information together with Laserfiche[®] Document Management. From the Salesforce[®] interface, users can access documentation pertaining to their Accounts, Contacts and Opportunities, as well as create new folders for new contacts.

The Salesforce[®] Integration for Laserfiche[®] makes importing and distributing content more efficient. This leads to more functionality with Laserfiche[®] Workflow and better business processes.

The Salesforce[®] integration for Laserfiche[®] includes:

- Accesses documentation in Laserfiche[®] pertaining to Accounts, Contacts and Opportunities from the Salesforce interface.
- Allows for full access interaction with respective client files.
- Provides a full repository view of Laserfiche[®] documentation.
- Utilizes Laserfiche[®] Web Access[®] functionality for document interaction – or WebLink[®] for read-only interaction.
- Includes scan, upload, edit, export, delete, and Laserfiche[®] search options for documents, folders, briefcases, and template data.
- Integrate with custom tabs created by users.

Chatter Accounts Co	omacis cases solutions reports	Dashboards Cities Digital Customers			
e New	Grand Hotels &	Resorts Ltd			
at Rems					
and Hotels & Resorts Ltd			Cu	stomice Page Edit Layout Printable Vie	w Help for this Pag
emo Account	-h- Show Feed				
mo Cities Dipital	< Back to List: Accounts				
utomer	Contacts (2)	Opportunities (5) Cases (4) Open Activities (5) /	Activity History (2) Notes &	Attachments (3) Partners (5)	
v Peterson emo Account	Account Detail	Edit Delete Include Offline			
21					
imo Account		Account [Change]	Rating	Warm	
hnson, Bob		itels & Resorts Ltd <u>Mew Hierarchil</u>	Phone	(312) 596-1000	
n Smith	▼ Laserfiche				
ne Grev	Caserfiche' Web Acces	\$\$		& Demo@dev1 Settings	Help Log Out
	Cities Digital Solutions, Inc.	Ele • Export • Edit • Tasks • F	iecorgs +		
ocycle Bin	Folders Search	Current folder			
ecycle Bin	Folders Search	Current folder	2	Search repository	P-
ocycle Bin	Folders Search	Current folder	2	d Pages Creation Date	То
ocycle Bin	Folders Search	Current folder.	2	d Pages Creation Date 11/2/2012 12:50:51	To To
ecycle Bin	Polders Search	Current folder Current folder Current folder Name Currents Compondence	2	d Pages Creation Date 11/2/2012 12:50:51 11/2/2012 12:50:11	To S PM ^
ocycle Bin	Folders Search Carel floote Cu Ansorts Life Consignation Consignations Consig	Current folder >	2	d Pages Creation Date 11/2/2012 12:55:51 11/2/2012 12:59:11 11/2/2012 1:0:20	To S PM PM
ocycle Bin	Folders Search	Current folder	2	d Pages Creation Date 11/2/2012 12:50:51 11/2/2012 12:50:11	To 5 PM 9 Mi 5 PM
ecycle Bin	Folders Search Carel floote Cu Ansorts Life Consignation Consignations Consig	Current fuider Current fuider Accevts Correspondence Correspondence Fanoge Pannag multitis multitis	2	d Pages Creation Date 11/2/2012 12 56 51 11/2/2012 12 59 51 11/2/2012 12 59 51 11/2/2012 12 59 51	To 0 PM PM 5 PM 1 PM
ecycle Bin	Folders Search Folders Search Folders Accounts Folders Accounts Folders Accounts Folders Panning Folde	Current folder	2	d Pages Creation Date 11/2/01/2 12 56 51 11/2/01/2 12 59 11 11/2/01/2 12 59 11 11/2/01/2 12 59 41 11/2/01/2 12 59 41 11/2/01/2 12 59 21	To 5 PM * * * * * * * * * * * * * * * * * *
eçyde Bin	Folders Search Folders Search Folders Accounts Folders Accounts Folders Accounts Folders Panning Folde	Current fuder Current fuder Activity Conseptioned Cons	2	d Pages Creation Date 11/2/01/21/25/65/ 11/2/01/21/25/65/ 11/2/01/21/25/65/ 11/2/01/21/25/65/ 11/2/01/21/25/65/ 11/2/01/21/25/95/ 11/2/01/21/25/95/	To 5 PM ^ PM 5 PH 1 1 PH 2 2 PH 1 PM 1 2 PH 1
rcycle Bis	Folders Search Folders Search Folders Accounts Folders Accounts Folders Accounts Folders Panning Folde	Current fuder Current fuder Mere Accevit France Penneg France	2	d Pages Creation Date 11:02012 12:58.51 11:02012 12:58.51 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.51 11:02012 12:59.51 11:02012 12:59.51	To 5 PM ^ PM 5 PH 1 1 PH 2 2 PH 1 PM 1 2 PH 1
ncycle Bin	Former Banders	Current Stater Construction Activity Construction Cons	2	d Pages Creation Date 11:02012 12:58.51 11:02012 12:58.51 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.51 11:02012 12:59.51 11:02012 12:59.51	To 5 PM ^ PM 5 PH 1 1 PH 2 2 PH 1 PM 1 2 PH 1
eççde Bin	Forder Sectors Image: Sectors Sectors	Current fuder Current fuder Mere Accevit France Penneg France	2	d Pages Creation Date 11:02012 12:58.51 11:02012 12:58.51 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.51 11:02012 12:59.51 11:02012 12:59.51	To 5 PM ^ PM 5 PH 1 1 PH 2 2 PH 1 PM 1 2 PH 1
eççde lin	Teams Teams	Constructions Addenie Addenie Charlense	2	d Pages Creation Date 11:02012 12:58.51 11:02012 12:58.51 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.51 11:02012 12:59.51 11:02012 12:59.51	To 5 PM ^ PM 5 PH 1 1 PH 2 2 PH 1 PM 1 2 PH 1
cycle fin	rearry interface rear	Constructions Addenie Addenie Charlense	2	d Pages Creation Date 11:02012 12:58.51 11:02012 12:58.51 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.51 11:02012 12:59.51 11:02012 12:59.51	To 5 PM ^ PM 5 PH 1 1 PH 2 2 PH 1 PM 1 2 PH 1
ugde film	Teams Teams	Constructions Addenie Addenie Charlense	2	d Pages Creation Date 11:02012 12:58.51 11:02012 12:58.51 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.41 11:02012 12:59.51 11:02012 12:59.51 11:02012 12:59.51	To 5 PM ^ PM 5 PH 1 1 PH 2 2 PH 1 PM 1 2 PH 1

The configuration allows for the use of tokens to build dynamic Laserfiche[®] Folder paths for the contact documentation, as well as the application of Laserfiche[®] Template Field information. Upload a briefcase per Salesforce entity to keep consistent folder structures, and choose between Laserfiche[®] Web Access[®] or WebLink[®] for viewing the client documentation in the Salesforce[®] interface.

Contact sales@citiesdigital or call 855-714-2800 x 2 for more information about Cities Digital's Salesforce[®] Integration for Laserfiche[®].

RMATION FURTHER

www.citiesdigital.com



855-714-2800 sales@citiesdigital.com Laserfiche® is a trademark of Laserfiche

