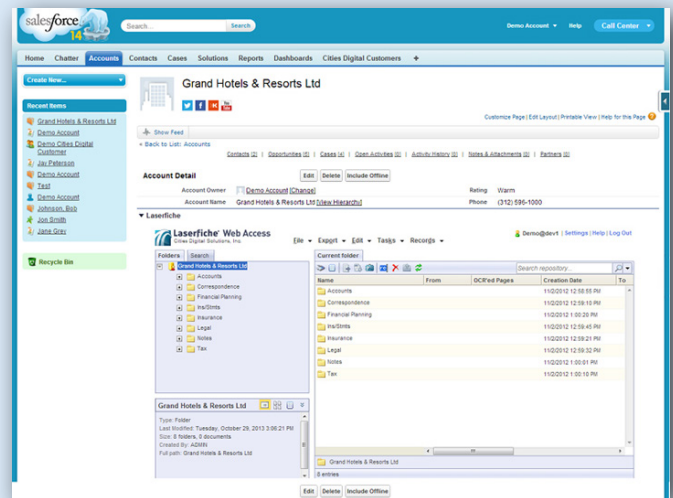# Salesforce Integration for Laserfiche

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®:

- **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.**

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®.

Salesforce & LASERFICHE

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