

# Salentica® CRM Integration for Laserfiche®

**Cities Digital's** integration for Salentica® CRM allows for easy interaction between Salentica® and Laserfiche®. Users are able to work with the corresponding Account, Contact, and Lead Documentation using Laserfiche® Web Access from the CRM interface.

Features of Cities Digital's Salentica® Integration with Laserfiche® include:

- Configuration page for administrators to map CRM attributes to Laserfiche® Template Fields to optimize searching.
- Full access interaction with respective Account, Contact, and Lead Documentation.
- Laserfiche® Web Access® functionality for document interaction.
- The ability to Upload, Edit, Export, Delete, and use Laserfiche® Search options for documents, folders, briefcases, and Template data.

The Salentica® integration with Laserfiche® allows for easy interaction with Laserfiche® Documentation from the CRM interface. The Laserfiche® tab located in Account, Contact, and Lead entities provides full access to corresponding documentation stored in Laserfiche®.



A screenshot of the Microsoft Dynamics CRM interface. At the top, it shows 'Microsoft Dynamics CRM | Salentica CRM | Families | Alexander'. Below the header, there's a 'FAMILY INFORMATION' section for 'Alexander'. A 'Laserfiche' tab is open, displaying a list of 14 entries under the heading 'Laserfiche'. The list includes items like 'Applications', 'Contract', 'Correspondence', 'CP Reports', 'Financial Plan', 'Financial Stmt', 'Insurance', 'Investments', 'Miscellaneous', 'Notes', 'Orты Reports', 'Service', 'Tax Return', and 'Wills and Trust'. To the right of the list, there are columns for 'Name', 'Pages', and 'Creation date'. A tooltip 'List' is shown over the 'Creation date' column. On the far right, there are 'Display Options' and 'ADMIN' buttons.

This integration utilizes Web Access® functionality to upload or scan in documents, export electronic files and briefcases, create files and folders, and edit Template data.

The Administration Configuration Page allows for mapping between Laserfiche® Template Fields and CRM Entity Attributes to optimize searching within Laserfiche®. Upload different Laserfiche® briefcases per Account, Contact and Lead to create specific subfolder structures, in the case that the contact folder structure does not exist in Laserfiche®. Ensure that users will create the appropriate contact within Laserfiche® when using the integration.

# Salentica® & LASERFICHE®

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