

Act! Integration for Laserfiche®

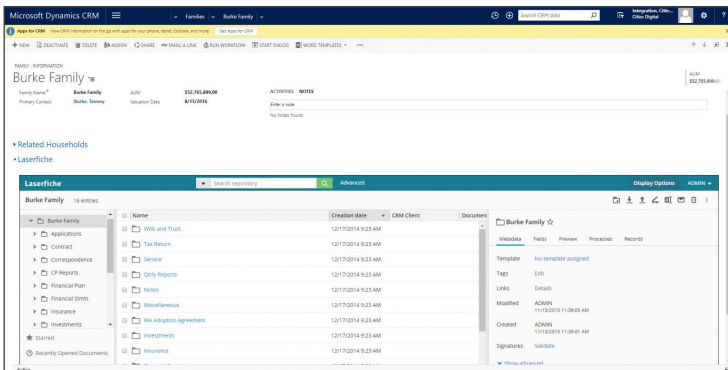


About

CDI's Act! integration creates a powerful link between your records in Act! and your content stored in Laserfiche.

This versatile integration allows users to conveniently manage client-specific content stored in Laserfiche from within the *Act!* or *Act! for Advisors* interface. Users are then able to easily search, view, scan and import documents to Laserfiche directly from Act! and incorporate that content into office Workflows.

The integration also allows for Laserfiche Templates to be dynamically populated with data from Act!.



CDI's Act! CRM/Laserfiche Integration

Features

- View Documents Through Act!**
 View record-specific documents stored in Laserfiche from within Act!.
- Scan Directly to Laserfiche**
 Scan documents directly to client folder in Laserfiche from Act!.
- Apply Act! Metadata**
 Automatically apply Act! metadata to newly scanned or imported documents.
- Easy Search Interface**
 Simplified search interface within Act! for locating relevant documents in Laserfiche.
- Workflow Process Efficiencies**
 Easily incorporate documents and data from Act! in Workflow processes.
- Subfolder Generation**
 Optional automated subfolder generation in Laserfiche for Act! records.