

# Orion Integration for Laserfiche®



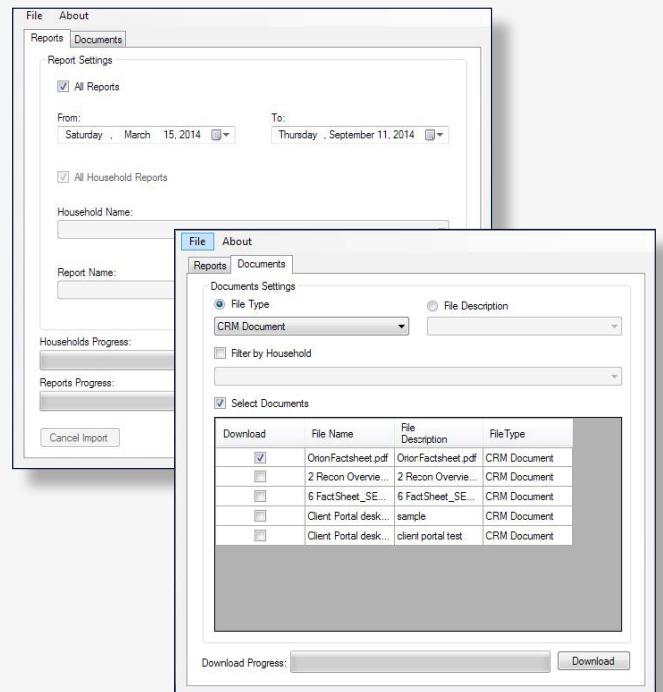
## ABOUT

CDI's integration with Orion is a portfolio accounting system and report manager allowing users to create customizable reports along with powerful billing tools and other portfolio management pieces advisors need to have total control over their data.

The Orion integration for Laserfiche® allows users to import reports from Orion directly into designated locations in Laserfiche by file type, file description, household and date range – and also allows users to download documents from Orion by the same parameters.

The integration provides the ability to apply metadata to reports being imported from Orion. The Orion Integration for Laserfiche includes the following features:

- Import reports from Orion to designated locations in Laserfiche.
- Import reports based on various parameters.
- Apply metadata and template information to imported documents.
- Download reports from Orion instead of importing directly.



The Orion integration for Laserfiche is a useful link between two powerful systems - and can unlock additional efficiency when coupled with ECM best practices and Laserfiche Workflow®.

Contact [sales@cdi.support](mailto:sales@cdi.support) or call 855-714-2800 x 2 for more information about CDI's Orion Integration for Laserfiche.