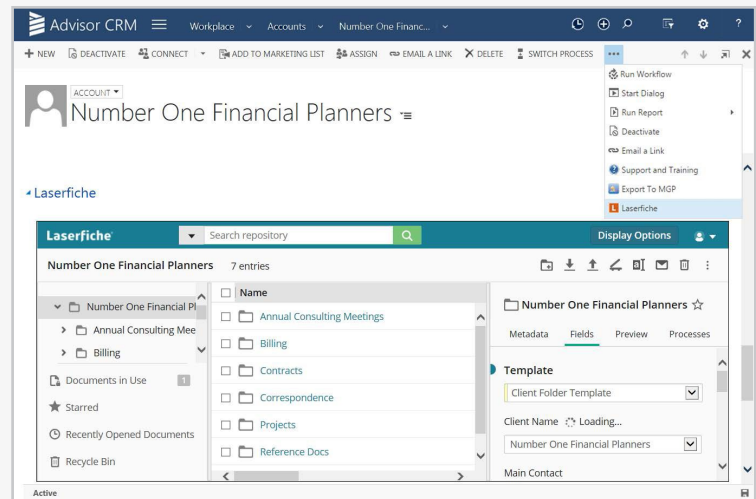# Tamarac® Integration for Laserfiche®

ABOUT

CDI's Laserfiche® Integration with Tamarac CRM fully interacts with Laserfiche Documentation per Account, Contact, and Lead Entities from the CRM interface.

The integration between Laserfiche and Tamarac allows for easy interaction with Laserfiche Documentation from the CRM interface. Clicking the Laserfiche tab located in Account, Contact, and Lead entities provides full access to corresponding documentation stored in Laserfiche. 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 the 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. This ensures that users will find or create the appropriate contact within Laserfiche when using the Integration.

FEATURES

- Includes an administration configuration options page to map CRM attributes to Laserfiche Template Fields to optimize searching.

- Allows for full access interaction with respective Account, Contact, and Lead Documentation.

- Utilizes Laserfiche Web Access functionality for document interaction.

- Includes Upload, Edit, Export, Delete, and LF Search options for documents, folders, briefcases, and Template data.

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