

# SmartOffice Integration for Laserfiche®



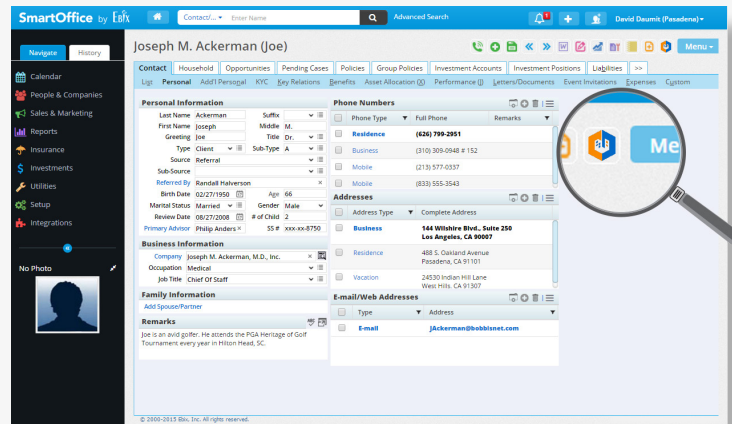
## ABOUT

CDI's SmartOffice Integration allows users to view documentation pertaining to contacts from the SmartOffice CRM interface. Users can configure the integration to use WebLink or Web Access for document viewing. Token values are selected during customization to create dynamic folder paths within Laserfiche®. The SmartOffice integration makes a seamless link between the CRM and a document repository, saving users time, helping them stay better organized and ultimately more profitable.

Features of the SmartOffice CRM Integration Include:

- Access to relevant documents in Laserfiche from the SmartOffice CRM interface.
- Dynamic creation of Client Folders within Laserfiche.
- Additional administration configuration for Laserfiche Template application.
- The ability to create dynamic Laserfiche Folder paths by selecting token values.
- The option to choose between Web Access and WebLink for document viewing.

The SmartOffice Integration by CDI allows users to interact easily with client documentation. From the SmartOffice CRM, users can access Laserfiche documentation pertaining to a client by using the SmartOffice Integration menu option.



By clicking on the Laserfiche link, users will open that client's Folder in Laserfiche using either WebLink or Web Access.

The administrative configuration page allows users to set up a dynamic folder structure using token information from the SmartOffice metadata to create their client Folders. The WebLink or Web Access URL is also configured on this page, along with default Laserfiche Template information.