

# Salentica® CRM Integration for Laserfiche®

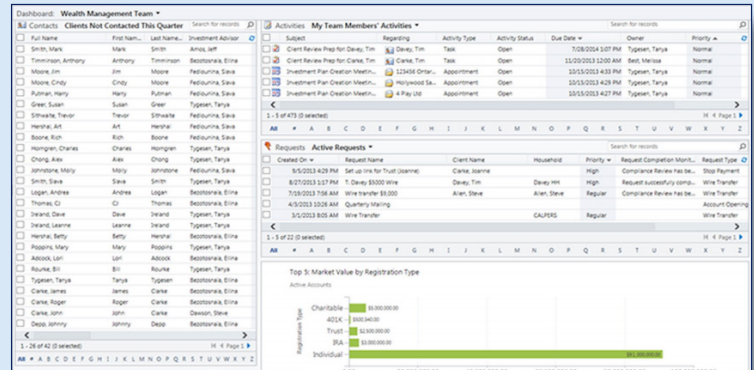
Cities Digital's integration for Salentica® CRM allows for easy interaction between Salentica® and Laserfiche®. Users are able to work with the corresponding Account, Contact, and Lead Documentation using Laserfiche® Web Access from the CRM interface.

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®. 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.

## SALENTICA CRM for WEALTH MANAGEMENT



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.

For more information about Cities Digital's Salentica® CRM Integration for Laserfiche® please email [sales@citiesdigital.com](mailto:sales@citiesdigital.com) or call 855-714-2800 x2.

# Salentica® & LASERFICHE®

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Laserfiche® is a trademark of Laserfiche



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