

# Laserfiche®-Schwab® PortfolioCenter® Solution

**Cities Digital's** solution for collating and organizing reports from the Schwab® Advisor Services PortfolioCenter® allows Financial Advisors to stay organized and become more efficient. Using Laserfiche® Workflow, the Solution provides users with an easy way to automate the processing of large numbers of client reports, breaking them out by individual client, inserting custom pages into the report, emailing the report, and finally, archiving the report in your Laserfiche® repository.

The Solution requires organizations to have a Laserfiche® folder structure that separates client files by individual folders with a Laserfiche® Template containing a unique Schwab® ID. The end result will be an automated method to collate, email and store client reports from the Schwab® Advisors Services PortfolioCenter® in predetermined locations in Laserfiche®.

The Solution offers:

- **Integration with Laserfiche® to utilize Workflow with Schwab® PortfolioCenter®.**
- **Automatically collate, route, auto-file and email reports generated in the Schwab® Advisor Services PortfolioCenter®.**
- **Insert custom pages into reports prior to archiving or emailing.**



Portfolio Description	Account Number	Objective	Advisor	Billable Client	Birth Date	Home Phone
Abbey, George	999-1035	GROWTH	JOHN	TRUE	12/05/1970	222-222-2222
Abbey, George	999-8012	PERFORMANCE	JOHN	TRUE	12/05/1970	555-555-5555
Abbey, Michael	999-8018	SPECULATION	JOHN	TRUE	11/09/1978	222-222-2222
Abraham, Jill	999-2020	RETIREMENT	JOHN	TRUE	08/02/1940	303-360-0000
Baker, Janet	999-7036	ASSET DIVERSIFICATI	JOHN	TRUE	11/09/1972	720-777-7777
Baker, Janet	999-7030	ASSET DIVERSIFICATI	JOHN	TRUE	11/09/1972	720-777-7777
Baker, Jennifer	999-7032	ASSET DIVERSIFICATI	JOHN	TRUE	11/09/1972	720-777-7777
Baker, Janet	999-7033	ASSET DIVERSIFICATI	JOHN	TRUE	11/09/1972	720-777-7777
Baker, Margaret	999-7021	ASSET DIVERSIFICATI	JOHN	TRUE	11/09/1972	720-777-7777
Baker, Michael	999-7024	ASSET DIVERSIFICATI	JOHN	TRUE	11/09/1972	720-777-7777
Brown, John	999-1023	ASSET PROTECTION	JOHN	TRUE	04/01/1982	866-275-1111
Brown, Maria	999-2006	RETIREMENT	JOHN	TRUE	06/09/1996	555-555-5555
Brown, Sarah	999-1007	ASSET PROTECTION	JOHN	TRUE	09/02/1960	866-220-1111
Brown, Will (b)	999-1005	ASSET PROTECTION	JOHN	TRUE	05/15/1965	866-220-1111
Harper, Clifton	999-2014	GROWTH	JOHN	TRUE	05/08/1979	540-555-5155
Matthews, Jacki	999-1009	ASSET DIVERSIFICATI	JOHN	TRUE	01/05/1996	910-777-7777
Sliva, Boyd	999-8006	ASSET DIVERSIFICATI	JOHN	TRUE	03/15/1936	444-444-4444

The Cities Digital Laserfiche®-Schwab® PortfolioCenter® Solution helps users stay organized and save time. The Solution is a crucial link between powerful systems that can lead to improved efficiency and better business processes.

Contact [sales@citiesdigital](mailto:sales@citiesdigital) or call 855-714-2800 x 2 for more information about the Laserfiche®-Schwab® PortfolioCenter® Solution.

# PortfolioCenter® & LASERFICHE®

855-714-2800

[sales@citiesdigital.com](mailto:sales@citiesdigital.com)

Laserfiche® is a trademark of Laserfiche



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