

Intacct Integration for Laserfiche



About

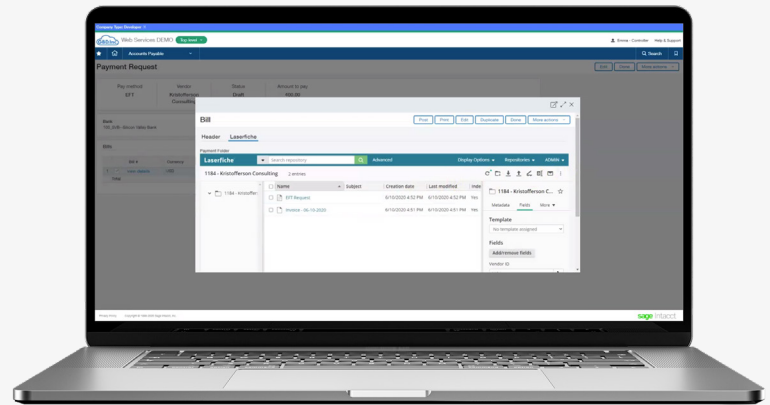
The CDI Intacct integration for Laserfiche allows for easy connectivity and interaction between Laserfiche your Intacct accounting software.

By utilizing Laserfiche Web Access, the CDI Intacct integration lets users quickly and easily access documentation in Laserfiche for any account, vendor, client, contact, POs, receipts, or custom entity/field, directly through the Intacct interface.

This full-access interaction gives users the time-saving ability to upload or scan documents through the Intacct interface, as well as export electronic files and briefcases, create files and folders, and edit template data.

Your folder structure in Laserfiche will also be automatically generated per account, vendor, client, contact, POs, receipts, or other record type. This will ensure the creation of specific subfolder structures in cases where the folder structure does not already exist in Laserfiche.

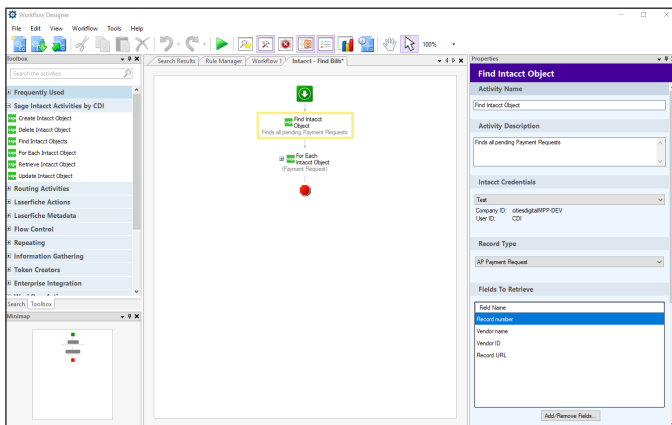
In addition, the Administration Configuration feature allows for controlled mapping between Laserfiche template fields and Intacct attributes, helping to optimize future searches in Laserfiche.



CDI's Intacct/Laserfiche Integration

Features

- Ability to view, scan, upload, edit, export, and delete documents directly from Intacct.
- Ability to search and access vendors, clients, POs, and receipts lead documentation from within the Intacct interface.
- Data auto-sync - updates in Intacct can automatically be applied to Laserfiche.
- Includes Laserfiche Workflow Activities:
 - Create Record
 - Delete Record
 - Find Record
 - For Each Record
 - Retrieve Record
 - Update Record
- Allows administrators to map Intacct attributes to Laserfiche template fields for optimized searching.
- Helps ensure the creation of standardized subfolder structures in Laserfiche for vendors, clients, POs, and receipts.



Intacct/Laserfiche Workflow Activities Included