

Salesforce Integration for Laserfiche

About

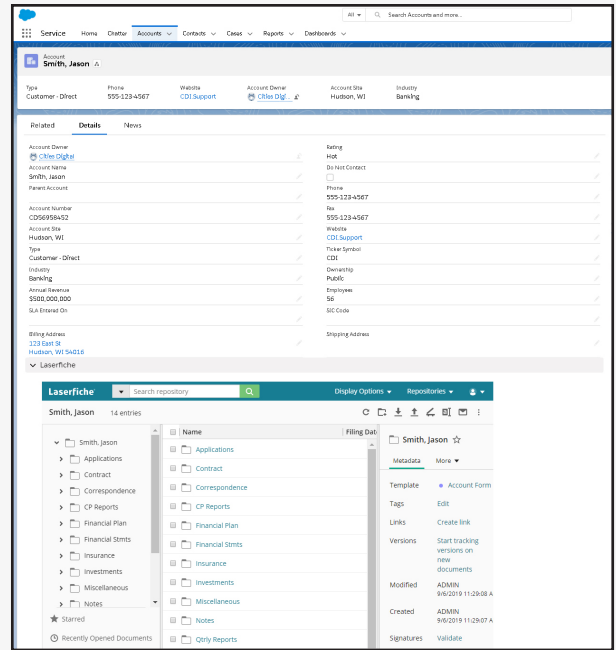
The CDI Salesforce integration for Laserfiche allows for easy connectivity and interaction between Laserfiche and Salesforce.

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

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

Your organization will also have the option to upload different Laserfiche briefcases per account, contact, lead, or other record type, to ensure the creation of specific subfolder structures, in cases where the folder structure does not already exist in Laserfiche.

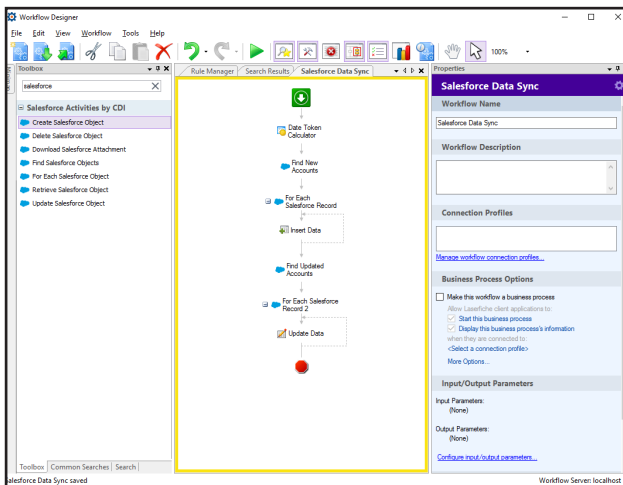
In addition, the Administration Configuration feature allows for controlled mapping between Laserfiche template fields and Salesforce attributes, helping to optimize future searches in Laserfiche.



CDI's Salesforce/Laserfiche Integration

Features

- Ability to view, scan, upload, edit, export, and delete documents directly from Salesforce
- Ability to search and access account, contact, and lead documentation from within the Salesforce interface
- Data auto-sync - updates in Salesforce 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 Salesforce attributes to Laserfiche template fields for optimized searching
- Helps ensure the creation of standardized subfolder structures in Laserfiche for new contacts



Laserfiche/Salesforce Workflow Activities Included