

Microsoft Dynamics CRM Integration for Laserfiche



About

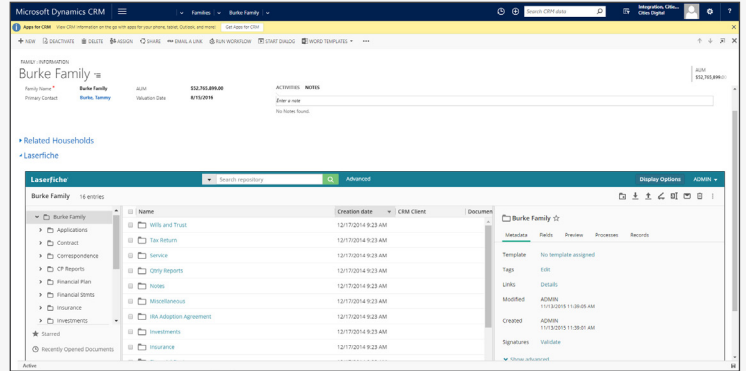
The CDI Dynamics CRM integration for Laserfiche allows for easy connectivity and interaction between Laserfiche and Dynamics.

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

This full-access interaction gives users the time-saving ability to upload or scan documents through the Dynamics 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.

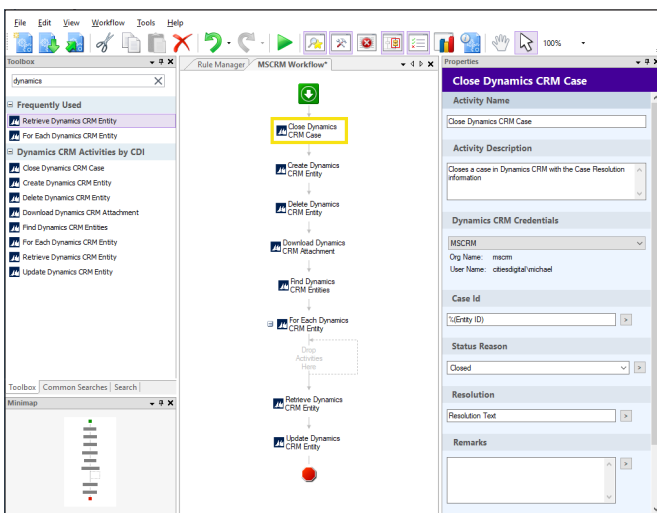
In addition, the Administration Configuration feature allows for controlled mapping between Laserfiche template fields and Dynamics attributes, helping to optimize future searches in Laserfiche.



CDI's Dynamics CRM/Laserfiche Integration

Features

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



Laserfiche/Dynamics CRM Workflow Activities Included