

CRM Activities for Laserfiche® Workflow



ABOUT

CDI's CRM Workflow Activities connect your Laserfiche system in real-time with Dynamics®, Salesforce®, Tamarac®, and Salentica®. Using Workflow Activities enables Laserfiche to update documents with status, look up contact details, create new contracts and compliment your custom processes.

The CRM Activities for Laserfiche Workflow also provides organizations with an automatic process for requesting records from specified recipients in Dynamics, Salesforce, Tamarac, or Salentica CRM. With this integration, users can add the CRM workflow activities to new or existing workflows within the Laserfiche Workflow Designer.

The Integration adds six workflow activities within the Workflow Designer; Create CRM Record, Delete CRM Record, Find CRM Records, For Each CRM Record, Retrieve CRM Record, and Update CRM Record. Together, these workflow activities provide seamless integration with Dynamics-based CRM systems to automate common everyday CRM tasks.

The features of this Integration from Cities Digital include:

- Allows for automatic indexing and OCR'ing of new documents as part of Windows scheduled task
- Enables users to choose server to execute OCR engine processing.

