CDI

REDTAIL

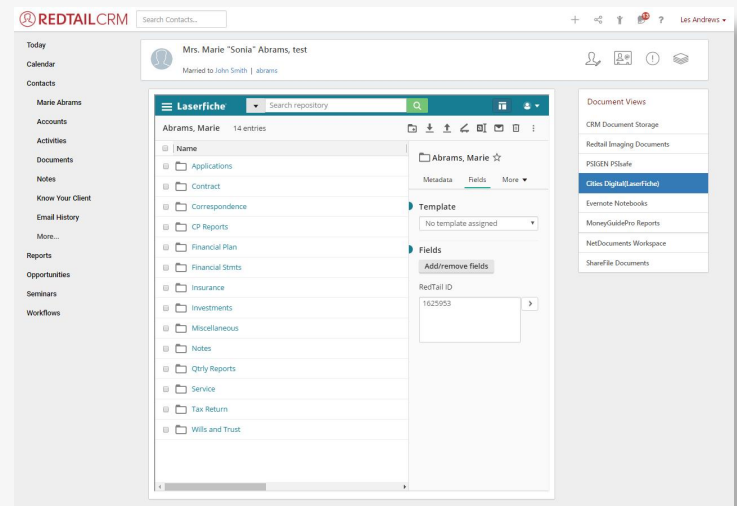# Redtail Integration for Laserfiche®

ABOUT

CDI integration allows for easy interaction between Redtail CRM and Laserfiche®. Users are able to work with the corresponding client documentation using Laserfiche Web Access from the Redtail CRM interface. The integration also allows for a full Laserfiche Repository view in Web Access to get a high level view of documentation from the Redtail CRM interface.

- Includes an administration configuration options page to map CRM attributes to Laserfiche Template Fields to optimize searching.

- Allows for full access interaction with respective Client Documentation.

- Provides for a full Repository view of Laserfiche Documentation.

- Utilizes Laserfiche Web Access functionality for document interaction.

- Includes Upload, Edit, Export, Delete, and LF Search options for documents, folders, briefcases, and Template data.

The Administration Configuration Page allows for mapping between Laserfiche Template Fields and CRM Entity Attributes to optimize the searching within Laserfiche.

Upload a Laserfiche briefcase to create specific subfolder structures, in the case that the Client folder structure does not exist.

CDI

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