

Smart Office CRM Integration for Laserfiche®

Cities Digital's SmartOffice Integration allows users to view documentation pertaining to contacts from the SmartOffice CRM interface. Users can configure the integration to use Web Link or Web Access for document viewing. Token values are selected during customization to create dynamic folder paths within Laserfiche. The SmartOffice integration makes a seamless link between the CRM and document repository, saving users time, helping them stay better organized and ultimately more profitable.

Features of the SmartOffice CRM Integration Include:

- Documents access from the SmartOffice CRM interface
- Dynamic creation of Client Folders within Laserfiche
- Additional administration configuration for Laserfiche Template application
- The ability to create dynamic Laserfiche Folder path by selecting token values
- The option to choose between Web Access and WebLink for document viewing

The SmartOffice Integration by Cities Digital allows users to interact easily with client documentation. From the SmartOffice CRM, users can access Laserfiche documentation pertaining to a client by

The screenshot shows a CRM record for Patricia Taylor. The record is divided into sections: Personal Information, Business Information, and Family Information. A callout box with a plus sign icon and the text 'Get documents so easily, just click this button up on the toolbar!' is positioned over the record. The plus sign icon is highlighted with a red box. The record shows fields for Last Name (TAYLOR), First Name (PATRICIA), Birth Date (11/29/1963), Age (48), and SS # (xxx-xx-0755). There are also fields for Business Information and Family Information.

using the SmartOffice Integration menu option. By clicking on the Laserfiche link, users will open that client's Folder in Laserfiche using either WebLink or Web Access.

The administrative configuration page allows users to set up a dynamic folder structure using token information from the SmartOffice metadata to create their client Folders. The WebLink or Web Access URL is also configured on this page, along with default Laserfiche Template information.

Contact your Cities Digital Account Representative for more information about Cities Digital's SmartOffice Integration for Laserfiche.

SMARTOFFICE LASERFICHE

+ CITIESDIGITAL

855-714-2800
sales@citiesdigital.com

Laserfiche® is a trademark of Laserfiche