

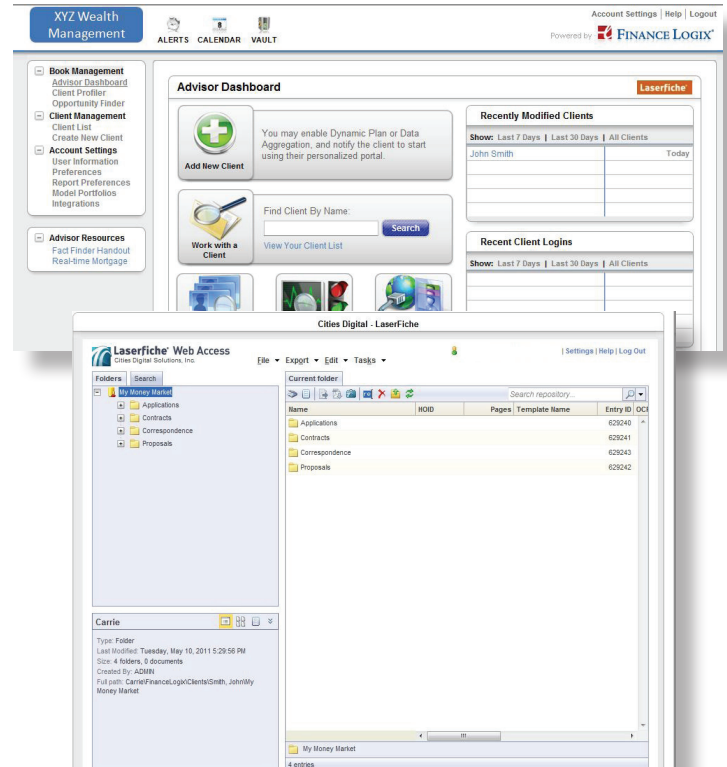
Finance Logix Integration for Laserfiche®

Cities Digital's Laserfiche Integration with Finance Logix allows full interaction with Laserfiche Documentation per Client and Account from the Logix interface.

This Integration allows for easy interaction between Finance Logix and Laserfiche. Users are able to work with the corresponding Client and Account Documentation using Laserfiche Web Access from the Finance Logix website. The Integration also allows for a full Laserfiche Repository view in Web Access from the Advisor Dashboard page, to get a high level view of documentation from the Finance Logix 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 and Account 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 integration between Laserfiche and Finance Logix allows for easy interaction with Laserfiche Documentation from the Logix interface. The Laserfiche button located at the Advisor Dashboard, Client, or Account



level allows for full Laserfiche access for corresponding documentation. This Integration utilizes Web Access functionality to upload or scan in documents, export electronic files and briefcases, create files and folders, and edit Template data.

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

FINANCE LOGIX LASERFICHE

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