

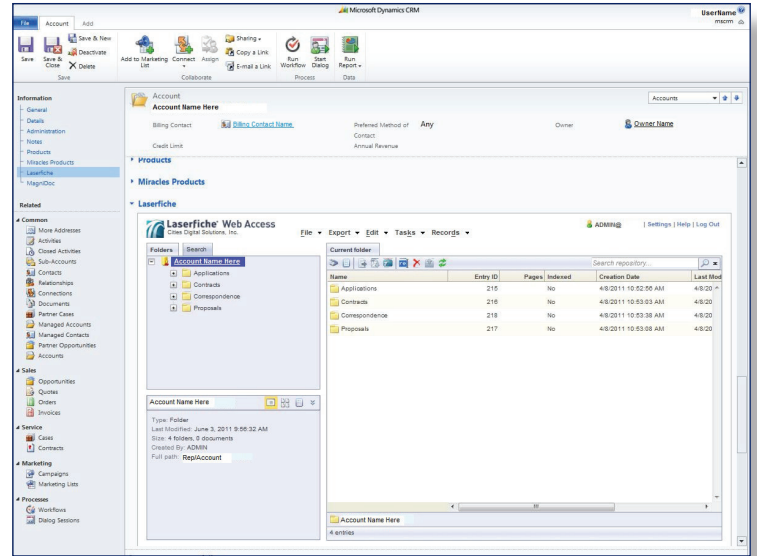
# Microsoft Dynamics CRM Integration for Laserfiche®

**Cities Digital's** integration allows for easy interaction between Microsoft CRM and Laserfiche®. Users are able to work with the corresponding Account, Contact, and Lead Documentation using Laserfiche Web Access from the CRM interface.

Features of Cities Digital's MSCRM Integration with Laserfiche Include:

- Configuration page for administrators to map CRM attributes to Laserfiche Template Fields to optimize searching.
- Full access interaction with respective Account, Contact, and Lead Documentation.
- Laserfiche Web Access functionality for document interaction.
- The ability to Upload, Edit, Export, Delete, and LF Search options for documents, folders, briefcases, and Template data.

The MSCRM integration with Laserfiche allows for easy interaction with Laserfiche Documentation from the CRM interface. The Laserfiche tab located in Account, Contact, and Lead entities provides full access to corresponding documentation stored in Laserfiche. This integration utilizes Web Access functionality to upload or scan in documents, export electronic files and briefcases, create files and folder, and edit Template data.



The Administration Configuration Page allows for mapping between Laserfiche Template Fields and CRM Entity Attributes to optimize searching within Laserfiche. Upload different Laserfiche briefcases per Account, Contact and Lead to create specific subfolder structures, in the case that the contact folder structure does not exist in Laserfiche. Ensure that users will create the appropriate contact within Laserfiche when using the integration.

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

# MICROSOFT CRM LASERFICHE

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