LF**INTEGRATOR** FOR SALESFORCE®

INTEGRATE AND EXTEND

Laserfiche integrates with Salesforce, one of the leading Customer Relationship and Service applications.

SECURE ACCESS YOUR WAY!

Access your Laserfiche documents, forms and records without leaving Salesforce.

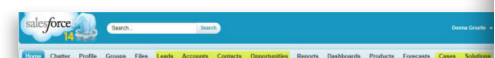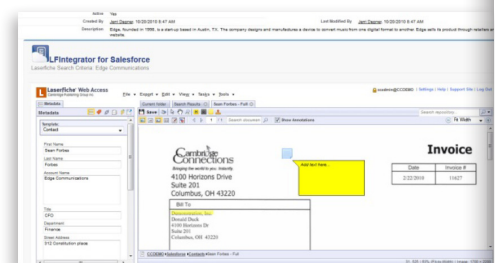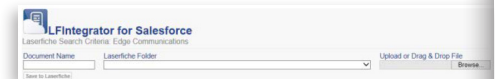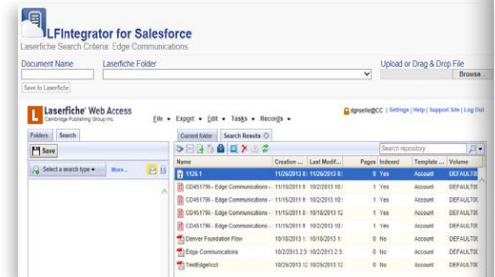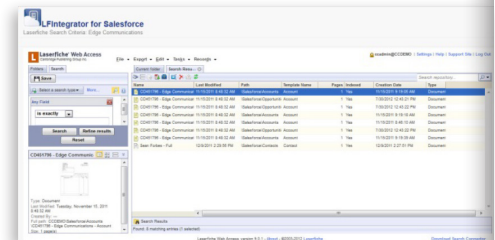## ON SCREEN INTEGRATION OF LASERFICHE WITH SALESFORCE

Laserfiche is the solution to ECM and document management requirements. Now, integrate your Salesforce CRM with Laserfiche. LFIntegrator inside the Salesforce object page automatically searches Laserfiche when it is opened and displays all associated documents. The user does not leave Salesforce to access a Laserfiche document.

- Displays associated Laserfiche documents
- User does not leave Salesforce to access documents
- Drill down to specific document
- Customize search criteria
- Update Laserfiche template metadata
- Save, upload, drag & drop to Laserfiche
- Supports Leads, Accounts, Contacts, Opportunities, Cases & Solutions

Without leaving Salesforce, save a document to Laserfiche and upload or drag & drop

Just drill down to a specific document and use any Web Access function including Notes and Highlighting.

It is currently supported in the Salesforce tabs for Leads, Accounts, Contacts, Opportunities, Cases and Solutions. Setup is completed via the LFIntegrator Settings Tab.

You can map the Salesforce fields to the Laserfiche fields on the associated Laserfiche Template for ten Salesforce Object Types. Then, check the checkbox next to the fields you wish to be included in the Laserfiche search. When any of these fields are changed in Salesforce they will be updated in Laserfiche.