How Laserfiche Works with Salesforce.com

Forward-thinking financial advisors know that intelligent use of technology is essential to improving client service, enhancing employee productivity and facilitating compliance. They also know that managing multiple applications causes costly inefficiencies that detract from the time they can put into profitable, client-facing work.

Built on an open architecture, Laserfiche enterprise content management (ECM) integrates seamlessly with salesforce.com to eliminate the need for paper files, streamline audits and protect confidential client documentation—lowering costs, decreasing risk and boosting profitability.

Laserfiche ECM

- Document management
- Records management
- Security and auditing
- Automated disclosure
- Flexible information capture

Better client service

Higher productivity

Less risk

Salesforce CRM

- Account management
- Lead management
- Opportunity tracking
- Analytics and forecasting
- Collaborative content library

Flexible Options for Information Capture

In today's mobile world, your advisors aren't sitting at a desk with a scanner, waiting to capture client information. They're in the field, building client relationships. But that doesn't mean you can afford to rely on easily misplaced paper files. Laserfiche gives your advisors flexible options for timely information capture without infringing on the time they spend with clients.

- Laserfiche bundles scanning into its software and provides the ability to scan directly from salesforce.com.
- Laserfiche eliminates the need to scan locally and then upload the imaged document, simplifying compliance by ensuring that there's only one copy of the document.
- Laserfiche is compatible with any scanner on the market, so previous investments in scanning technology won't go to waste.
- Laserfiche supports non-traditional imaging devices such as networked copiers, multifunction peripherals, fax servers and even digital cameras.
- The Laserfiche Mobile iPhone app allows advisors to securely—and instantly—upload confidential and time-sensitive client files from the field.

"Our clients have small children, so we aspired to meet them within ten minutes of where they work or live. As much as we moved around, we needed a way to manage client information where security was bulletproof, but we could be mobile enough to capitalize on making the planning process exceptionally convenient. Today, we rely heavily on Laserfiche and our CRM."

Carl Friedrich, CFP®/CEPF®
Owner, Friedrich Wealth Management

Automated Document Processing

Don't make your employees waste time on repetitive data entry and document filing. When you scan using Laserfiche, your client documents are automatically filed after inheriting metadata from salesforce.com, giving staff more time to focus on revenue-generating activity.

- Use account information from salesforce.com to automatically name, index and assign metadata to client documents.
- Simplify back-file conversion with batch import and workflow capabilities that automatically capture and process large numbers of documents and route them to the appropriate places in salesforce.com.
- Use Laserfiche workflows to create document views that are applicable to the advisor.
- Capture and process documents in a variety of electronic formats, including PDFs, e-mails and Microsoft Word documents.

"We've brought on four new advisors in the last year, but thanks to Laserfiche we haven't had to bring on any new administrative staff. When you tell your executives that your administrative staff can do something in 20 minutes that used to take four hours, they can appreciate that."

Amy Flourry
Operations Manager, Rehmann Financial

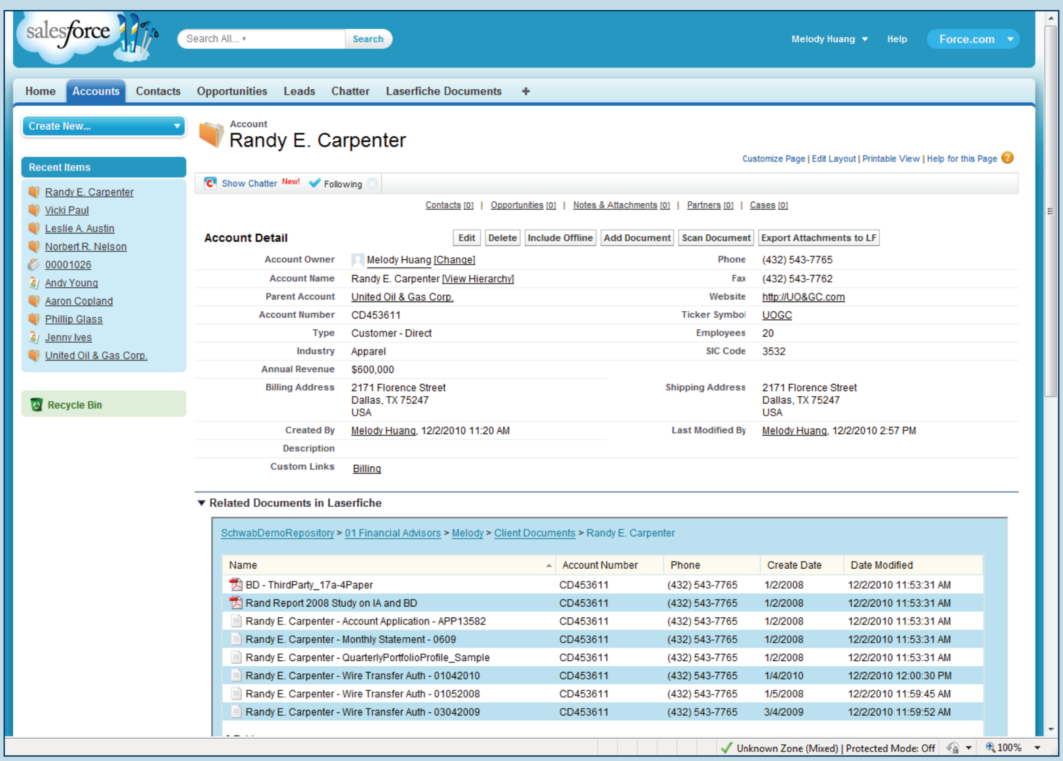
Intelligent Document Interface

The CRM interface is the heart and soul of your technology portfolio. Laserfiche understands this, and provides an integration that doesn't force your advisors to change the way they work. With nearly 30 years of technology experience, Laserfiche knows that the point of this integration is to allow your advisors to benefit from advanced ECM functionality in the context of their CRM.

- The Laserfiche Integration for salesforce.com takes a CRM-centric approach to documents, giving advisors instant access to client documents by embedding them directly into each client's page in salesforce.com.
- Activity in salesforce.com triggers behind-the-scenes actions in Laserfiche so that advisors never have to open a separate Laserfiche screen.
- Laserfiche is a highly flexible and customizable solution that RIAs can easily adapt to their own unique needs. In addition to storing client files, Laserfiche also manages documents related to running the practice, including HR records, compliance logs and more.

"Integrating Laserfiche with our CRM gives us immediate access to information, creating more time for mission-critical investment research—which ultimately benefits the client and our performance. I'm not sure you can put a price tag on the efficiency gains."

Joseph Salpietro
President and CEO, Xpyria Investment Advisors



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