

Digital signatures meets document management, best practices for processing & archiving with DocuSign



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Laserfiche Snapshot™

Generate unalterable, archival-quality TIFF copies of electronic documents from within their native applications.



Scheduled Import

Conserve network resources and simplify backup by regularly importing documents from a network folder.



Automation/ Forms Processing

Automatically capture and index information with production-level processing utilities.



Drag & Drop

Import documents directly into Laserfiche using familiar drag and drop functionality.



Scanning

Scan paper documents of any size using almost any image capture device.



Microsoft® Office® Integration

Send Word®, Excel®, PowerPoint®, e-mails and other Office documents directly to Laserfiche from within their native applications.



Laserfiche – Your central repository for client and back office data



Document Imaging

Converting paper documents into an electronic or digital format.



Document Management

Managing documents (physical or digital) throughout their life cycle, including acquisition, filing, access control and archiving.



Business Process Management

Applying workflow technology to repeatable (and in this context, content-related) processes in order to standardize and optimize them.



Laserfiche Enterprise Content Management

Managing all organizational content throughout its life cycle, including acquisition, filing, access control, archiving and—where applicable—BPM.



Departmental installation



Enterprise-wide deployment



Benefits of DocuSign and DM

1. Workflow and routing for approval prior to digital signature use
2. Status and audit logs showing document status
3. Manually or automatically submit documents for digital signature
4. Automatic capture and importation into document management from docusign
5. Workflow to autofile documents and merge with other client documents



Sign over web forms w/ signature

CONFIDENTIAL


INITIAL CONSULTATION FORM

Household

Single Line

Date captured on form submission
Date

Please fillout this form as completely as you can and then fax or mail it to: Financial Group.
A representative will contact you within 48 hours to discuss your needs and schedule an appointment.



Los Angeles, CA
New York, NY
[P] 888.888.888
[F] 800.800.8000
financialgroup.com

Number:


Inspection Information

Did the building meet the minimum International Fire Code Requirements?
 Yes
 No

Inspected by:

Reviewed by:

Signature





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