



Advisors Assistant Integration for Laserfiche®

ABOUT

The CDI Advisors Assistant® Integration gives the ability to access documentation stored in Laserfiche® without leaving the Advisors Assistant interface. By opening a client profile in Advisors Assistant, users can view all corresponding Laserfiche documentation. Users may scan, import, or append documents within the Advisors Assistant interface and know that their documentation is synchronized with Laserfiche.

- Includes the ability to view Laserfiche documentation under client profiles in Advisors Assistant.
- Allows for scanning, importing, and appending documents stored in Laserfiche from Advisor Assistant.
- Synchronizes documentation within Laserfiche.

The Advisors Assistant Integration from CDI allows users an easy way to view, import, and append pagesto documents stored in Laserfiche from the Advisors Assistant interface. While viewing client information within Advisors Assistant, users can click on the “scan” tab to review corresponding documentation. Users may also choose to import documents through view, or append pages to a current document. These features allow for easy integration without having to leave the Advisors Assistant application.

