



## **Imaging Assistant for Laserfiche™ For Advisors Assistant & Laserfiche Users**

*Imaging Assistant for Laserfiche™* is a “middleware” application created by Bluelake Software ([www.bluelake.com](http://www.bluelake.com)), a Laserfiche reseller and maker of various add-in products supporting document capture. It merges an industry leading client management application – Advisors Assistant® – with an industry leader in electronic document management – Laserfiche®. The result is a powerful combination for converting paper documents to electronic files tied to each client, with minimal data entry, and very little learning curve for existing Advisors Assistant users.

### **Imaging Assistant for Laserfiche™ provides the ability to:**

1. Scan or electronically import documents from within the familiar Advisors Assistant interface, and store the documents in Laserfiche, in a secure, efficient, and regulatory compliant manner.
2. Access the documents stored in Laserfiche from within Advisors Assistant, by clicking on Client File Links, like any other linked document within Advisors Assistant.
3. Perform standalone searches in Laserfiche directly, leveraging information like Client Name, SSN or Tax ID, populated automatically from the Advisors Assistant database.

Setup is easy, and the product is available for free, fully functional, 30-day evaluation. Download and pricing is available on our website at [www.bluelake.com](http://www.bluelake.com) – see Products, Advisors Assistant Integration.

### **Requirements:**

- Advisors Assistant version 6.x or above
- Laserfiche 7.2 or above, including 8.3.
- Windows XP, Vista or Windows 7

If you already own Laserfiche the solution includes the ability to link existing documents in Laserfiche® to Advisors Assistant® contact records.

If you do not own Laserfiche®, please contact Bluelake Software or another authorized reseller for a demonstration.

### **Other Add-In Products:**

Bluelake has a solution for leveraging the data contained in Advisors Assistant for bulk, automated capture of Fund Statements . Please contact us for details or view more information here:

[http://www.bluelakesw.com/Downloads/AALF6\\_Fund\\_Form\\_Processing.pdf](http://www.bluelakesw.com/Downloads/AALF6_Fund_Form_Processing.pdf)

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