

# Fast•Class File

SmartOffice

## Volume 37: Laser App Integration

This Fast Class demonstrates how SmartOffice integrates with Laser App software. The **SmartLink for Laser App** makes it possible to quickly fill out forms and applications in Laser App with SmartOffice contact information.

To populate Laser App forms with SmartOffice contact data, you will need the following software and licenses:

- Laser App Software Version 7.2 or higher (available for purchase online at [www.laserapp.com](http://www.laserapp.com))
- SmartOffice Version 3.5.9 or higher
- SmartLink for LaserApp (available for purchase from E-Z Data)

To take advantage of SmartOffice integration with Laser App software, you will need to ensure that the **SIAdapter.LaserApp** option is selected in the **Module/Licenses** section of the **User Roles/Licenses** tab for your User ID.

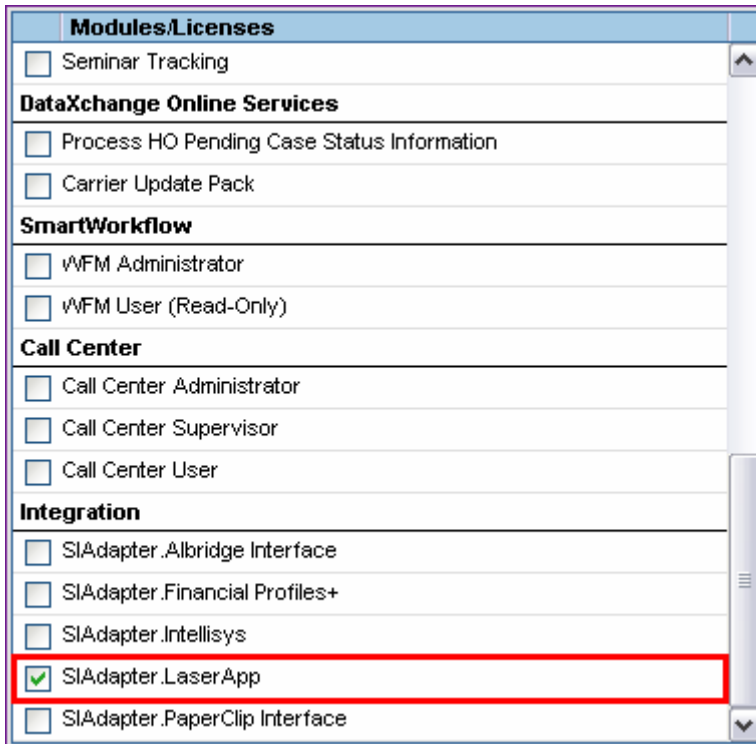


Figure 1: The Modules/Licenses section of the User Roles/Licenses tab.

To populate a form in Laser App using contact data from SmartOffice:

- Open the contact record in SmartOffice with the information to be used in the Laser App form.
- With the contact record open, click the **Laser App** button in the toolbar.



Figure 2: The Laser App button in the Contact record toolbar.

*Note: The **Laser App** button is only available on the contact record toolbar. The **Laser App** button is available on the following Contact record tabs: **Summary, Detail, Add'l Personal, Key Relations, Benefit, Letters/Documents, and Opportunities.***

- Laser App will open in Quick Form Mode.



Figure 3: Laser App Quick Form Mode.

- Select **Forms** in the menu bar of Laser App Quick Form Mode.
- Select the desired form.

*Note: In Laser App Version 8, forms can be downloaded in the **Forms** menu using the **Form Installation** option. To learn more about what forms are available and how to perform a download, visit [www.laserapp.com](http://www.laserapp.com).*

- Laser App will open the selected form populated with data from the contact record selected in SmartOffice.



**Laser App Software - Sample Form**

Print Save Open Reset

Status: CLIENT: Joseph M. Ackerman REP: Eric Burgess Web Site: http://www.laserapp.com/forms.htm

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# Sample Form

## New Account App

Rep Name	Rep #
Daniel Odell	

**Account Registration**

Individual  UGMA  Corporation  Trust  
 Joint  UTMA  Partnership  Other

B/D Confirmation # \_\_\_\_\_

**Account Owner**

Name Joseph M. Ackerman Citizenship \_\_\_\_\_  
 Address 488 S. Oakland Avenue  
 City, State and Zip Code Pasadena, CA 91101  
 DOB 02/27/1950 Social Security # 576094321  
 Day telephone \_\_\_\_\_ Evening telephone 6267992951  
 Legal address (if different from above) \_\_\_\_\_  
 City, State and ZIP Code \_\_\_\_\_  
 E-mail joe ackerman@eznet.com

**Joint Owner**

Name Kathleen Ackerman Citizenship \_\_\_\_\_  
 Address 488 S. Oakland Avenue  
 City, State and Zip Code Pasadena, CA 91101  
 DOB 05/08/1955 Social Security # 550763111  
 Day telephone \_\_\_\_\_ Evening telephone 6267992951

**Figure 4: Sample Laser App form populated with SmartOffice contact record data.**

Contact information imported to Laser App from SmartOffice includes the primary Contact Name, Address, DOB, SSN, Phone Number, Employment Name, Address and Occupation.

All fields in Laser App forms are 'live'. Data can be easily added or modified simply by clicking on the selected field and adding/updating data.

Data from related contacts linked in a SmartOffice **Household** can be added to the form by clicking **Insert** and **>>** buttons in the form or by toggling the **Registration Type** drop-down in the upper right hand corner.

To add contact data to a Laser App form using either the **Insert** or **>>** button:

- Click the **Insert** or **>>** button to open the **Insert Beneficiary/Dependent** screen.
- Select contact data in the **Insert Beneficiary/Dependent** screen with a left-click.
- Click **OK** to add the contact data to the form.

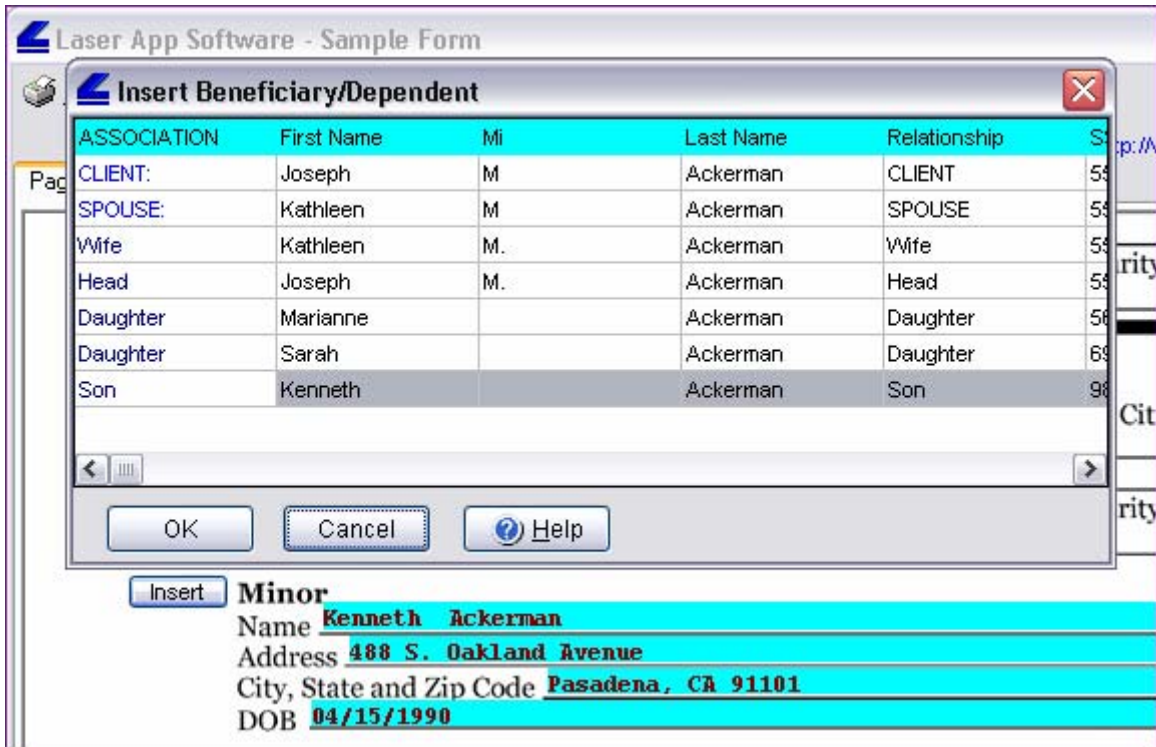


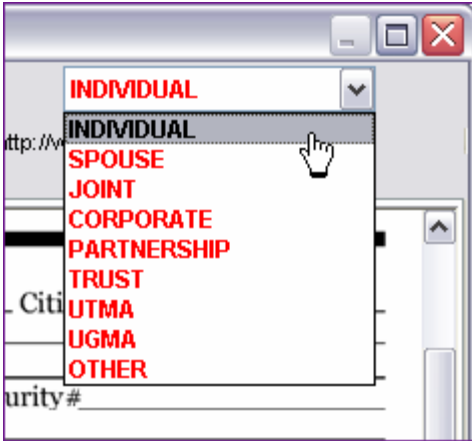
Figure 5: Contact data added to form from the Insert Beneficiary/Dependent screen.

Linked contact info available in the **Insert Beneficiary/Dependent** screen is defined by **Household** relationships established in SmartOffice.

*Note: Since Smartoffice Household data is used to identify contact relationships for Laser App forms, the selected contact and spouse (if married) will appear twice if the contact selected in SmartOffice is a married head of household.*

To add contact data to a form using the **Registration Type** drop-down:

- Left-click the **Registration Type** drop-down field.
- Select the contact registration type from the available choices.
- Contact data will be added to the form based on registration choice and contact relationships established in a SmartOffice **Household**.



**Figure 6: The Registration Type drop-down field.**

*Note: Selections in the **Registration Type** drop-down field will determine the relationship between contact data selected in SmartOffice and primary applicant and application type in Laser App Quick Form Mode.*

When data entry is complete, the form can be printed using the **Print** button in the Laser App menu bar or saved using the **Save** button. Files can be saved in one of two ways: either as a temporary file that can be updated at a later time, or as a .pdf file with user defined security and password protection. (File security settings for .pdf files available in Laser App Version 8 only.)