SmartLink for Laser App
User Guide

SmartOffice®

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Introduction

This guide outlines the use of the Laser App Integration for SmartOffice version 5.1.3 and higher. The integration of this application involves exporting data from SmartOffice to the Laser App form filling software, saving time filling out hundreds of important forms with client data. This module is available as a separate add-on to SmartOffice. For information on purchasing the Laser App Integration, please contact E-Z Data's Sales Department at (800) 777-9188. For more information, visit www.ezdata.com. For more information on the Laser App application, visit www.laserapp.com.

Requirements for the Laser App Integration

- Laser App 8.0 or higher
- SmartOffice Online v5.1.3 or higher
- Rights to the Laser App integration

Setting Up Data in SmartOffice

In order to automatically populate the fields in Laser App, the data must be entered correctly in SmartOffice; otherwise, the forms will be populated inconsistently for each contact record.

Data can be entered for the following:

- Client — Main contact used for the application. This can include either a person or business. — See pages 1 and 5 for details.

- Spouse — Used for joint application, application for spouse, and beneficiary information. — See page 3 for details.

- Beneficiaries — Key Relations who are specified as a beneficiary. — See page 6 for details.

Client - Person

The table below details the SmartOffice fields to enter in order to be automatically populated in Laser App.

Note that the Laser App fields are found on the Client Information screen within Laser App. Please refer to the *Working with Laser App* section on page 7 for further details and instructions.

SmartOffice Fields	Comments	Laser App Fields
The following data is entered on the Contact (P) tab.		
First Name		First Name
Middle		MI
Last Name		Last Name
Greeting		Salutation
Birth Date		DOB
Marital		Marital Status
Gender		Sex
Employer		Employer
Occupation		Occupation

SmartOffice Fields	Comments	Laser App Fields
Primary Residence Phone Number	Make certain to select the **Primary Residence** option.	Home Phone
Mobile Phone	The first mobile number entered will be the one used by Laser App.	Cell Phone
Primary Business Phone Number	Make certain to select the **Primary Business Phone** option.	Employer's Phone
Primary Business Phone Extension		Employer's Phone Extension
Business Fax Number	The first business fax number entered will be the one used by Laser App.	Employer's Fax
Preferred E-mail Address	Make sure to select the **Preferred** option.	Email
Primary Residence Address		
Address Block, Line 2, Line 3	Make certain to select the **Primary Residence Address** option.	Address
City		City
State		State
ZIP Code		ZIP
Country		Country of Residence
Primary Business Address		
Address Block, Line 2, Line 3	Make certain to select the **Primary Business Address** option.	Employer's Address
City		Employer's City
State		Employer's State
ZIP Code		Employer's ZIP
Preferred Address		
Address Block, Line 2, Line 3	Make certain to select the **Preferred Address** option.	Legal Address
City		Legal City
State		Legal State
ZIP Code		Legal ZIP
The following data is entered on the Add'l Personal tab.		
Total Income		Client Income
Net Worth		Net Worth
Citizenship		Citizenship
SS #		SSN
Driver's License #		Driver's License #

SmartOffice Fields	Comments	Laser App Fields
Driver's License State		Exp. Date
Driver's License Expiration Date		Issuing Entity
The following data is entered on the Key Relations tab.		
Relationship (Accountant)	Name and Preferred Phone Number	Accountant Name Acct. Phone & Phone ext.
Relationship (Attorney)	Name and Preferred Phone Number	Attorney Name Attorney Phone & Phone ext.
The following data is entered in the Business Contact record. This is only available when the client is an owner of a business. **Key Relations > Business Relations (Role = Owner)**		
Business Name		Company Name
Tax ID		Tax ID
Business Address		
Address Block, Line 2, Line 3		Company Address
City		City
State		State
ZIP Code		Zip
Business Phone		Phone and Ext.
Preferred E-mail Address	Make sure to select the **Preferred** option.	Email
Business Fax Number	The first business fax number entered will be the one used by Laser App.	Fax

Spouse

In order to automatically populate the forms in Laser App, the spouse must be designated as a main Contact's key relation; otherwise, the information will not be available on the Laser App forms.

Note that the Laser App fields for the spouse are found on the **Client Information** screen > **Spouse** tab in Laser App. Refer to the *Working with Laser App* section on page 7 for further details and instructions.

SmartOffice Fields	Description	Laser App Fields
The following data is entered on the Contact (P) tab.		
First Name		First
Middle		Mi
Last Name		Last
Greeting		Salutation
Birth Date		DOB

SmartOffice Fields	Description	Laser App Fields
Gender		Sex
Employer		Employer
Occupation		Occupation
Mobile Phone	The first mobile number entered will be the one used by Laser App.	Cell Phone
Primary Business Phone Number	Make certain to select the **Primary Business Phone** option.	Employer's Phone
Primary Business Phone Extension		Employer's Phone Extension
Business Fax Number	The first business fax number entered will be the one used by Laser App.	Employer's Fax
Preferred E-mail Address	Make sure to select the **Preferred** option.	E-mail
Primary Residence Address		
Note that the Client's Primary Residence Address will be used for the Spouse's Home Address in Laser App.		
Primary Business Address		
Address Block, Line 2, Line 3	Make certain to select the **Primary Business Address** option.	Employer's Address
City		Employer's City
State		Employer's State
ZIP Code		Employer's ZIP
The following data is entered on the Add'l Personal tab.		
Total Income		Spouse Income (Banking/Finances tab)
Citizenship		Citizenship
SS #		SSN
Driver's License #		Driver's License #
Driver's License State		Exp. Date
Driver's License Expiration Date		Issuing Entity

Client - Business

The table below details the fields to populate in SmartOffice in order to be automatically populated in Laser App.

Note that the Laser App fields are found on the Client Information screen within Laser App. Please refer to the *Working with Laser App* section on page 7 for further details and instructions.

SmartOffice Fields	Comments	Laser App Fields
The following data is entered on the Business (P) tab.		
Business Name		Last Name/Co. (Basic Info tab)
		Company Name (Corp/Trust Info tab)
Tax ID		Tax ID (Corp/Trust Info tab)
Tax		Client Tax Bracket (Banking/Finances tab)
Preferred Phone Number	Make certain to select the **Preferred** option.	Phone (Corp/Trust Info tab)
Primary Business Phone Extension		Phone Extension (Corp/Trust Info tab)
Business Fax Number	The first business fax number entered will be the one used by Laser App.	Fax (Corp/Trust Info tab)
Preferred E-mail Address	Make sure to select the **Preferred** option.	Email (Corp/Trust Info tab)
Preferred Address		
Address Block, Line 2, Line 3	Make certain to select the **Preferred Address** option.	Address
City		City
State		State
ZIP Code		ZIP
Business Address		
Address Block, Line 2, Line 3	The first business address entered will be the one used by Laser App.	Legal Address
City		Legal City
State		Legal State
ZIP Code		Legal ZIP
The following data is entered on the Key Relations tab.		
Role (Accountant)	Name and Preferred Phone Number	Accountant Name
		Acct. Phone & Phone ext.
		(Banking/Finances tab)
Role (Attorney)	Name and Preferred Phone	Attorney Name

SmartOffice Fields	Comments	Laser App Fields
	Number	Attorney Phone & Phone ext. (Banking/Finances tab)

Beneficiaries

Beneficiaries are considered anyone who is part of the Client's Key Relations. In order to automatically populate the forms in Laser App, the beneficiary must be designated as the Client's key relation; otherwise, the information will not be available on the Laser App forms.

Note that the Laser App fields for the beneficiaries are found on the **Client Information** screen > **Beneficiaries and Others** tab in Laser App. Refer to the *Working with Laser App* section on page 7 for further details and instructions.

SmartOffice Fields	Description	Laser App Fields
The following data is entered on the Contact (P) tab.		
First Name		First
Middle		MI
Last Name		Last
Birth Date		DOB
Employer		Employer
Occupation		Occupation
Preferred Phone Number	Make certain to select the **Preferred Phone** option.	Phone
Primary Business Phone Number	Make certain to select the **Primary Business Phone** option.	Employer's Phone
Primary Business Phone Extension		Employer's Phone Extension
Preferred E-mail Address	Make sure to select the **Preferred** option.	E-mail
Preferred Address		
Address Block	Make certain to select the **Preferred Address** option.	Legal Address
City		Legal City
State		Legal State
ZIP Code		Legal ZIP
Primary Business Address		
Address Block, Line 2, Line 3	Make certain to select the **Primary Business Address** option.	Employer's Address
City		Employer's City
State		Employer's State
ZIP Code		Employer's ZIP
The following data is entered on the Add'l Personal tab.		
SS #		SSN/TID

SmartOffice Fields	Description	Laser App Fields
The following data is from the Key Relations tab.		
Relationship		Relationship

Working with Laser App

Once all of the data is entered in the appropriate fields in SmartOffice, begin completing the forms.

To Open Laser App from SmartOffice

1. Find the appropriate Contact record and either:
   - Select the Contact from the Contact Summary.
   - Open the Contact record and then select either the **Contact (P)** or **Add'l Personal** tab.
2. Click the **Laser App** button.
3. The File Download dialog box displays the following options:
   - Open - Opens Laser App.
   - Save - Saves the file to the computer.
   - Cancel - Cancels the process.
4. Clear the **Always ask before opening this file** option if you do not want to display this dialog box in the future and then click the **Open** button.
5. Laser App displays with the Client's name displayed on the toolbar.

Entering Additional Information in Laser App

Before selecting a form, review the data in Laser App to ensure that everything is entered properly. The Laser App Client Information dialog box is used to review the information already populated by SmartOffice as well as to enter additional information needed in a form. This further minimizes the amount of manual entry since it is entered once and automatically populated in the necessary fields within the selected forms.

A majority of the fields are already populated by SmartOffice. The remaining information can be entered in the appropriate tabs.

To Enter Additional Information in Laser App

1. To open the Client Information dialog box, do one of the following:
   - **Laser App 8.x Users**: From the expanded **Data View** menu, select **Contact Data**.
   - **Laser App 9.x Users**: From the expanded **Actions & Settings** menu, select **Contact Data**.
2. Click the appropriate tab to review, and if necessary, enter additional information for the:
   - Client - Person (Basic Information tab).
   - Spouse (Spouse tab).
   - Beneficiaries (Beneficiaries & Others tab).
   - Client - Business (Corp/Trust Info tab).
   - Client's financial information (Banking/Finance tab).

3. Enter information in the appropriate fields.
4. Close the Client Information dialog box to begin filling out forms.

   Note that the information entered will automatically be saved and this information will only be available prior to closing Laser App.

Tips & Tricks

The following are a few tricks to help fill out forms more efficiently.

### Fill out Forms for Spouses, Joint Applications, etc.

Fill out a form for the client's spouse, joint application, and others by using Laser App's Registration Type drop-down list. Select the appropriate option from this drop-down list to automatically populate the necessary fields within the form. For further details, please refer to the Laser App Help.

Including Representative Information in Forms

The representative's information actually comes from Laser App, not SmartOffice. This information is based on what was already entered while setting up Laser App.

To display the rep's information, click the **Data View > Rep Info** menu (**Actions & Settings > Rep Info** menu if using Laser App 9). The Installed Rep License dialog box is opened to display the representatives and the details for each rep if multiple reps are listed.
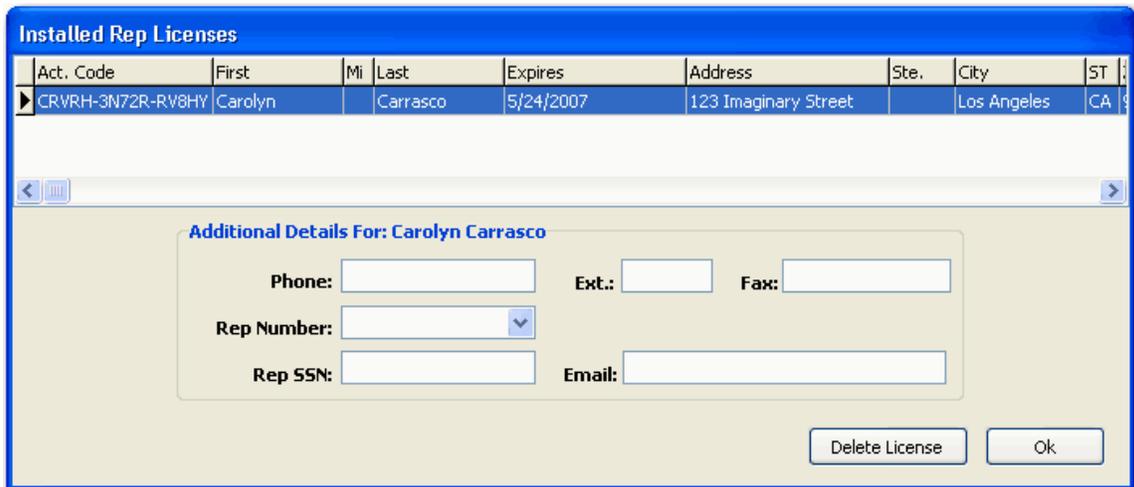
The following information can be modified:

- Rep #
- Telephone Number
- Extension
- Fax Number
- Social Security Number
- E-mail Address

To modify the rep's information:

1. From the Installed Rep Licenses dialog box, highlight the rep that you want to modify.
2. Click the **Edit License** button.
3. From the Enter Your Rep Information dialog box, make the necessary modifications.
4. Click the **OK** button to save the changes.
5. Close the Installed Rep Licenses dialog box.