



## Client Data System<sup>®</sup>

Laser App Integration  
User Guide



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## Introduction

This guide outlines the use of the Laser App Integration for Client Data System® (CDS) version 4.3 and higher. The integration of this application involves exporting data from CDS 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 CDS. 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.ez-data.com](http://www.ez-data.com). For more information on the Laser App application, visit [www.laserapp.com](http://www.laserapp.com).

## Requirements for the Laser App Integration

- Laser App 7.2 or higher
- CDS v 4.3 or higher
- Rights to the Laser App integration

Please see the [Laser App Integration](#) fast class, which will explain the features of Laser App integration.

## Setting Up Data in CDS

In order to automatically populate the fields in Laser App, the data must be entered correctly in CDS; 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. See page 1 for details.
- Spouse Used for joint application, application for spouse and beneficiary information. See page 2 for details.
- Beneficiaries Family members who are specified as a beneficiary. See page 3 for details.

### Client

The table below details the fields to populate in CDS 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 for further details and instructions.

CDS Fields	Comments	Laser App Fields
<b>The following data is entered on the contact Personal tab.</b>		
First Name		First Name
MI		MI
Last Name		Last Name
Birth Date		DOB
Marital		Marital Status
Gender		Sex
SS #		SSN
Business Name		Employer
Occupation		Occupation

CDS Fields	Comments	Laser App Fields
Residence Phone Number	The first residence phone number entered will be the one used by Laser App.	Home Phone
Preferred E-mail Address	Make sure to select the <b>Preferred</b> option.	E-mail
<b>Residence Address</b>		
Street (both lines)	The first residence address added will be the one used by Laser App.	Address
City		City
State		State
ZIP		ZIP
Country		Country of Residence
<b>Business Address (which is coming from the Business Name link)</b>		
Street (both lines)		Employer's Address
City		Employer's City
State		Employer's State
ZIP		Employer's ZIP
<b>The following data is entered on the Add'l Personal tab.</b>		
Driver's Lic. #		Driver's License #
Lic. State		Issue Entity

## Spouse

In order to automatically populate the forms in Laser App, the spouse must be associated as a main Contact's key relation with type equal to Family; 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 > Spouse** tab in Laser App. Refer to the [Working with Laser App](#) section for further details and instructions.

CDS Fields	Description	Laser App Fields
<b>The following data is entered on the contact Personal tab.</b>		
First Name		First
MI		MI
Last Name		Last
Birth Date		DOB
Gender		Sex
Business Name		Employer
Occupation		Occupation
<b>Residence Address</b>		
Note that the Client's Residence Address will be used for the Spouse's Home Address in Laser		

CDS Fields	Description	Laser App Fields
App.		
<b>Business Address (which is coming from the Business Name link)</b>		
Street (both lines)		Employer's Address
City		Employer's City
State		Employer's State
ZIP		Employer's ZIP
<b>The following data is entered on the Add'l Personal tab.</b>		
Driver's Lic. #		Driver's License #
Lic. State		Issue Entity

### Beneficiaries

Beneficiaries are considered anyone who is part of the Client's key relations (of the Family type) other than the spouse. In order to automatically populate the forms in Laser App, the Beneficiary must be associated as the Client's key relation with type equal to Family; 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 > Beneficiaries and Others** tab in Laser App. Refer to the [Working with Laser App](#) section for further details and instructions.

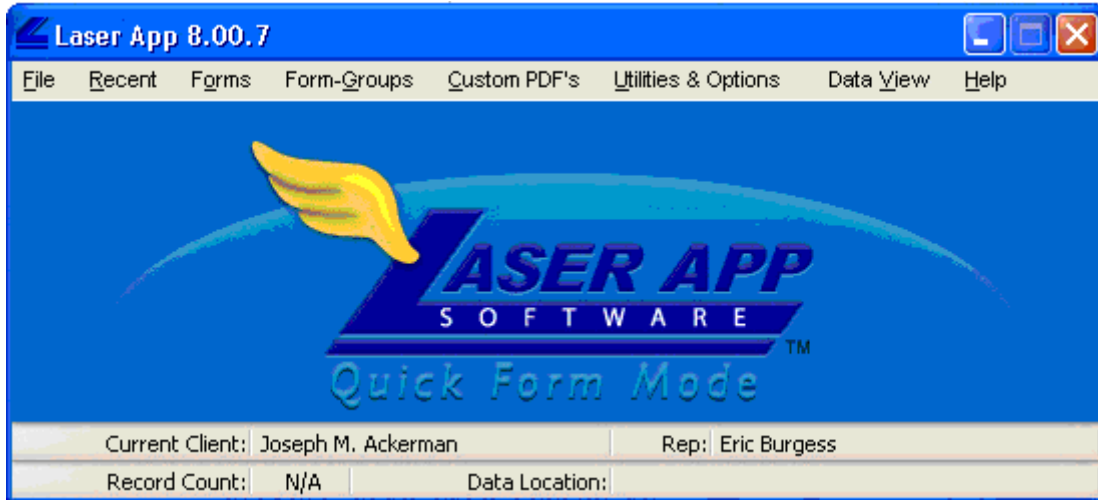
CDS Fields	Description	Laser App Fields
<b>The following data is entered on the Contact (P) tab.</b>		
First Name		First
MI		MI
Last Name		Last
Birth Date		DOB
SS #		SSN
Residence Phone Number	The first residence phone number entered will be the one used by Laser App.	Phone
<b>Residence Address</b>		
Street (both lines)	The first residence address added will be the one used by Laser App.	Address
City		City
State		State
ZIP		ZIP

## Working with Laser App

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

### To Open Laser App from CDS

1. Find the appropriate Contact record and then select **Launch Laser App** from the expanded **Tools** menu.
2. 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 CDS 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 CDS. The remaining information can be entered in the appropriate tabs.

### To Enter Additional Information in Laser App

1. From the **Data View** menu, select **Contact Data** to open the Client Information dialog box displaying the Basic Information tab.
2. Click the appropriate tab to review, and if necessary, enter additional information for the:
  - Client (Basic Information tab).
  - Spouse (Spouse tab).
  - Beneficiaries (Beneficiaries & Others tab).
  - Corporations & Trust (Corp/Trust Info tab).
  - Client’s Investment and Financial information (Banking/Finance tab).
3. Enter information in the appropriate fields.
4. Close the Client Information dialog box to begin filling out forms.

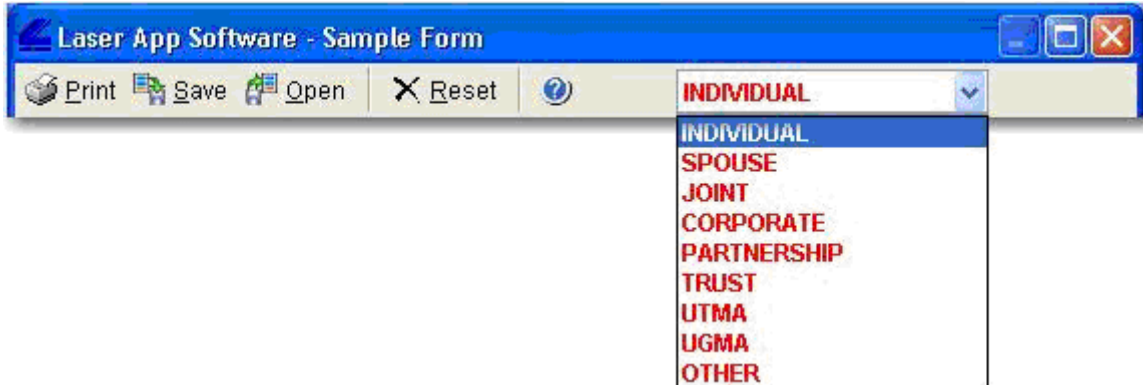
Note that the information entered will automatically be saved and this information will only be available until closing Laser App.

## Tips & Tricks

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

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

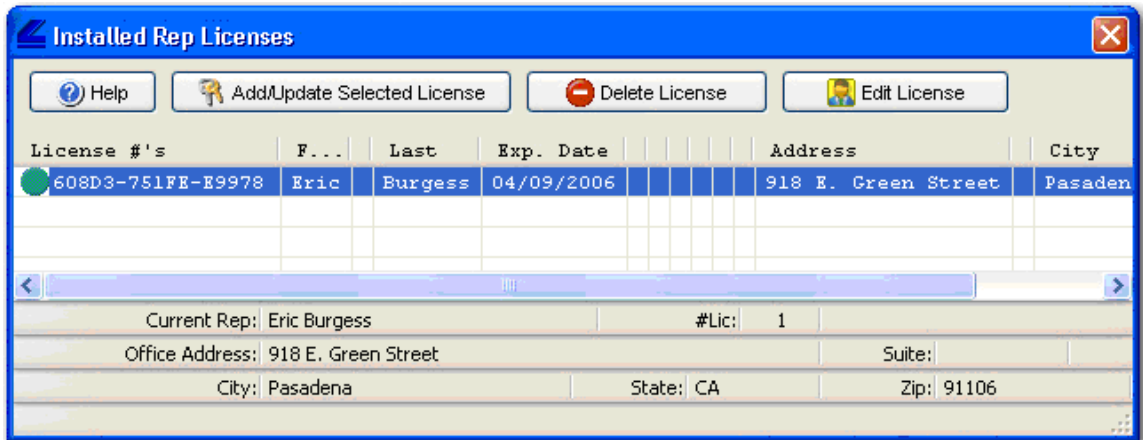
Fill out a form for the client's spouse, joint application and others by using Laser App's Registration Type drop-down list. Just select the appropriate option from this drop-down list to automatically populate the necessary fields within the form. For further details, please refer to the Laser App Help.



### Including Representative Information in Forms

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

You can view the rep's information from the **Data View > Rep Info** menu. The Installed Rep License dialog box displays to show 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.