## Laser App Export for Act4Advisors Import

Importing data into Act4Advisors is relatively simple. Your main issue is getting the data out of Laser App. To export the data out of Laser App 7.x, follow these instructions:

- 1. Open Laser App
- 2. On the menu, click on Utilities, Data Utilities, Export Data



3. On the next window, click on Create New Export and then Next

Data Export Wizard	Σ
Export Options	guration
Create New Export	
? Help X Close	🏟 Next

4. On the next window, click on Client and then Next

Data Export Wizard	
Please Choose Which Data to Export            • Client         • C Pending Transactions         • Rep         • Approved Transactions         • O Pending Transactions	
? Help X Close ♣ Back ♣ Ne	ext

5. On the next window, click on Export All Clients and Next



6. All Fields and then Finish

ZData Export Wizard		X
Field Selection      All Fields      Selected Fields		
? Help X Close	<b>4</b> Back	🗰 Finish

7. When asked to save your configuration, choose No



8. Next, Save the file to your Desktop or another memorable desired location with the named Laser App Export.csv

Export Data As	? 🔀
Savejn: 🞯 Desktop	- 🖛 🛍 🕂 📰-
Hy Documents My Computer My Network Places AA Images Desktop Streaming email messages	DP Letters Unused Desktop Shortcuts AdvMgmtReport.csv Laser App Export.csv S1 Holdings Report.csv Shared Documents
File <u>n</u> ame: Laser App E	xport.csv Save
Save as type: Comma Deli	mited Text (*.csv)

9. The data is now saved to a comma delimited text file and is ready for importing into Act4Advisors.

## Laser App Export for Act4Advisors Import

You next step is to import the Laser App data into Act4Advisors. If you already have data in Act4Advisors, be sure to backup your Act4Advisors database BEFORE you start!

You will need to download the Laser App to Act4Advisors.map file from Allied Financial Software, Inc to more easily map the data in the Laser App Export file to Act4Advisors. Customers can use the WebInfo tab or visit our website at www.software4advisors.com

- 1. Open ACT! and the Act4Advisors database.
- 2. Click on File, Data Exchange, Import to start the ACT! Import Wizard
- 3. In the first wizard window, change the File Type to Text-Delimited and browse to the Laser App Export.csv file. When you browse for this CSV file, you will have to change the File Type to CSV



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File <u>n</u> ame:	aser App Export.csv			<u>O</u> pen
Files of type:	ext - Delimited (*.csv	)		Cancel

- After you have chosen the correct file, click Next
   Leave the next screen at Contact Records Only and click on Next

Import Wizard	
	ACT! databases can contain contact records and group records. What kind of records do you want to import? © Contact records only © Group records only © Contact and group records To view additional import options, click the Options button. 
I	< Back Next > Finish Cancel

6. The next screen is asking you to load a preset map file created by ACT!. Choose Don't use predefined map file and click Next

Import Wizard	
	ACT! allows you to use predefined map files to help you import data from other applications. These map files are predefined templates that match the database fields from other applications to fields in an ACT! database. Do you want to use a predefined map file? <ul> <li>① Use predefined map</li> <li>② Don't use predefined map</li> </ul> <li>Select the map you would like to use when you import your data.</li>
L	< Back Next > Finish Cancel

7. On the next screen, you should load the Laser App to Act4Advisors.map file. If you do not have this file, you will have to manually map each Laser App field on the left to the appropriate Act4Advisors field on the right. The map file does this for you automatically.

Import Wizard			
	CONTAC The data being imported must fields in the currently open da	T MAP t be mapped to the indivitation	dual
1000	Map this field	To this field	
1 2	EMAIL	E-mail Address	~
	EMPLOYERADDRESS	Address 1	
	EMPLOYERCITY	City	
	EMPLOYERFAX	Fax	
	EMPLOYERNAME	Company	
	EMPLOYERPHONE	Phone	
	EMPLOYERSTATE	State	~
	<	al anna	>
	Kernel     Reset       Record 1     Map file: L	Load Map Save M aserApp to	ар
	< <u>B</u> ack <u>N</u> ext>	Finish Can	cel

To load the map file, click on Load Map button and browse to the Laser App to Act4Advisors.map file. With newer version of Act4Advisors this file is located in C:\Program Files\A4A\ folder.

8. After selecting the file choose Finish and your data will be imported into Act4Advisors.