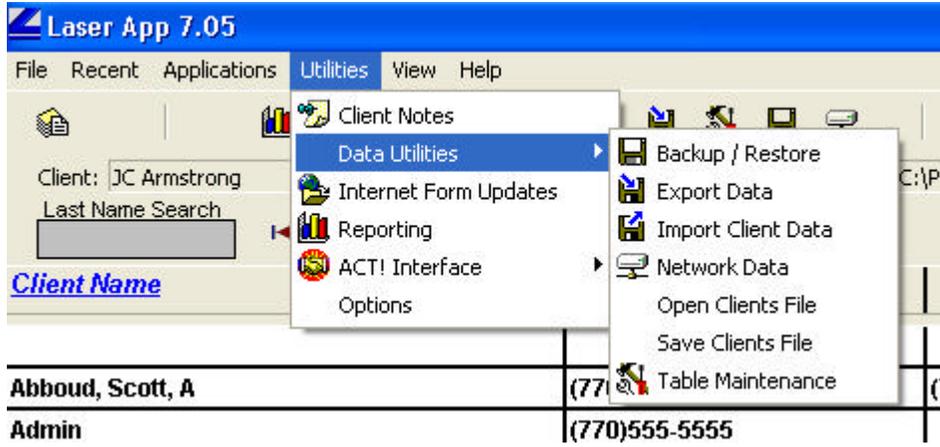


Laser App Export for Act4Advisors Import

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



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



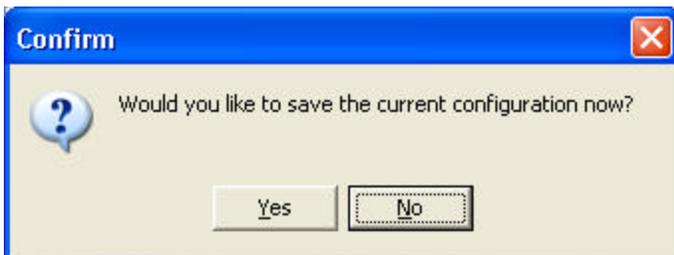
5. On the next window, click on Export All Clients and Next



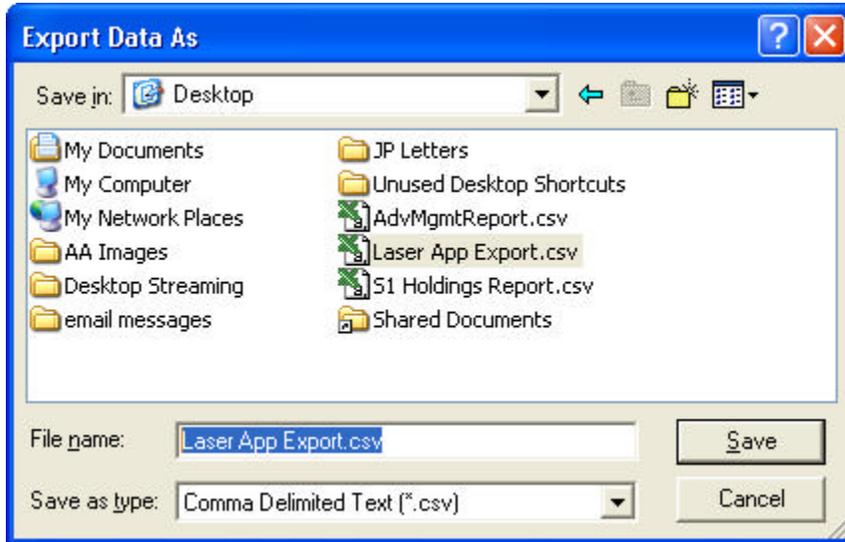
6. All Fields and then Finish



7. When asked to save your configuration, choose No



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



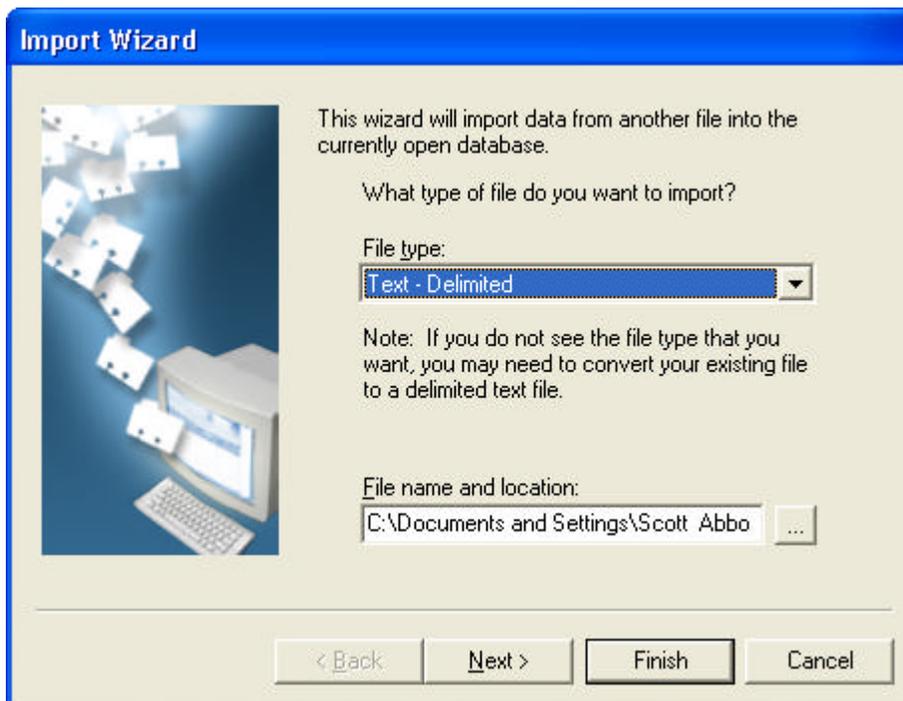
- The data is now saved to a comma delimited text file and is ready for importing into Act4Advisors.

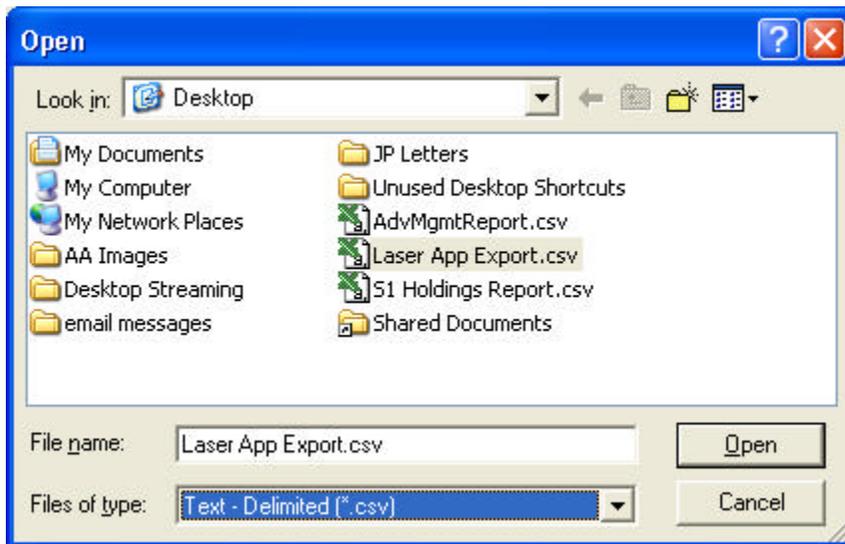
Laser App Export for Act4Advisors Import

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

- Open ACT! and the Act4Advisors database.
- Click on File, Data Exchange, Import to start the ACT! Import Wizard
- 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

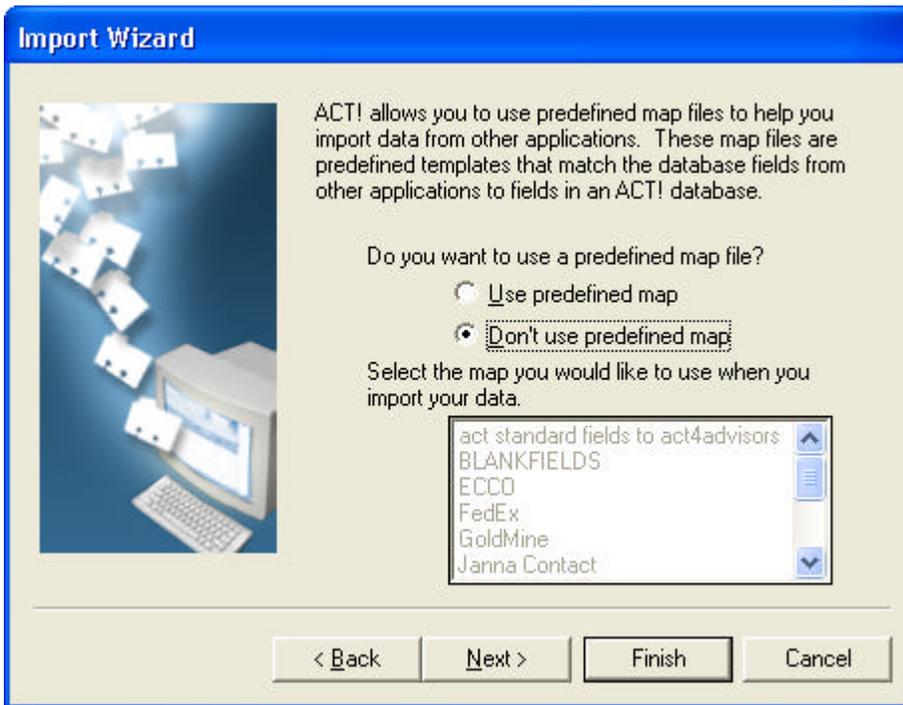




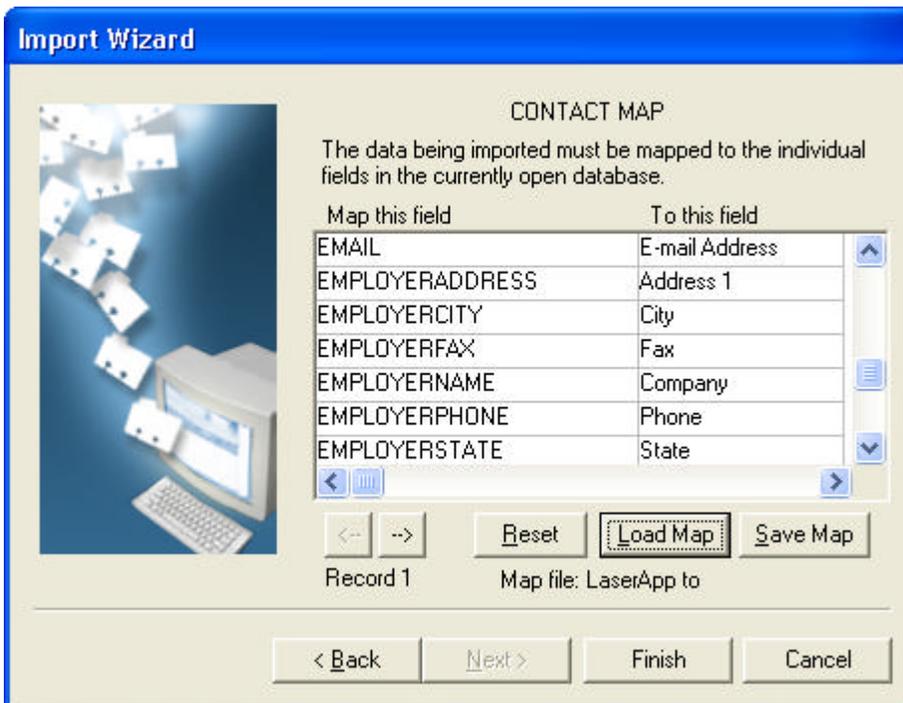
4. After you have chosen the correct file, click Next
5. Leave the next screen at Contact Records Only and click on Next



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



- 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.



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.

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