



# **Laser App Software**

## **Enterprise Ver. 9 Installation Guide**

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## In a Nutshell...

This basic step-by-step installation guide describes in detail three types of installations: Basic Installation setups (new installs & demos). *Note: demo installations do not have access to all the network functionalities and additional downloads.*

All users interested in learning more detailed information about Laser App Enterprise should refer to the built in help file system available from the "Help" menu within the program and by pressing the F1 key on many of the application's screens.

## What is Online Software Activation?

Starting with Laser App 7 online software activation has been required to establish your account with our service. Software Activation takes place over a secure Internet connection. Your personal information and privacy is of utmost importance to us. Please see our no-nonsense privacy statement at <http://www.laserapp.com/> for details.

### **Overview & Purpose**

The purpose of software activation is not just to reduce illegal software piracy that costs us and our loyal paying users, but to simplify the task of managing rep addresses, the appropriate broker forms, and special form promotions for our organizational customers.

### **What Information is Sent During Activation?**

If you are evaluating Laser App you will enter your name which appears as the rep name on forms, the office address used on forms, your email address, your office phone, and the broker/dealer's name who you are licensed with (if any). In addition, information based on your current hardware (configuration which cannot be used to identify you personally) is then sent securely to Laser App.

Our secure servers will then process your request and email you an activation code which is used by Laser App to download and install a public key encrypted certificate containing your account information. This information includes the rep name and office address, the duration of the subscription, and the forms you have access to. If you have purchased a full version of the software multiple licenses may be added to a single copy of the program. This allows a single assistant to fill out paperwork for multiple registered reps. The actual registration certificate need never be handled directly by the user and can be retrieved at any time for the duration of your subscription with your activation code.

### **When do I need to Activate Laser App?**

If you are evaluating Laser App you are not required to activate. However, only a single water-marked form is available, and many of the features will not work until you activate in "trial" or "paid" mode.

All non-demo users need to activate Laser App on any new "clean" installation. Periodic automatic re-activation also takes place when your subscription is renewed. The time interval for subscription renewals may vary from 30 to 365 days. Program enhancements and patches generally will not require you to reactivate unless specifically stated.

### **How to Activate Laser App Online:**

1. Establish a connection to the Internet.
2. If you use a proxy server be sure to enter the proxy name and port number information in Internet Settings located under the **Utilities→Program Settings→Proxy Settings** menu.
3. Click **Help→Program Registration & Activation** from Laser App's main menu.

4. Choose the activate option, enter your 15 digit activation code and click the “Activate” button.

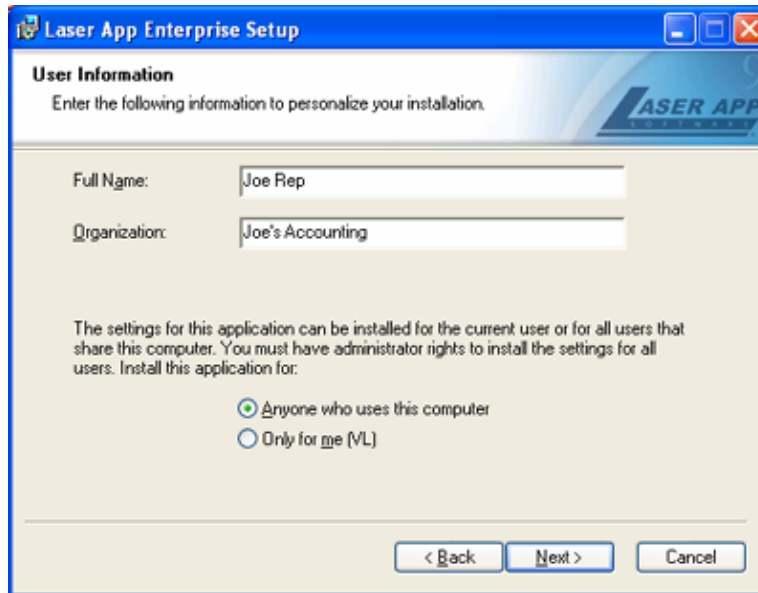
In a few seconds your copy of Laser App will be activated and you can download additional forms as well as explore more advanced features.

## Basic Installation

Existing users can download the “*elaserapp\_de.exe*” (data-enabled version) or “*elaserapp\_nd.exe*” installer programs from links in emails sent by us, or from My Laser App by clicking **Utilities**→**My Laser App Account** in the Laser App 9.x program menu. When prompted by your browser choose to save the setup program file to your hard drive. Network users should save the install file in a shared folder on their network to avoid repeating downloads from separate workstations.

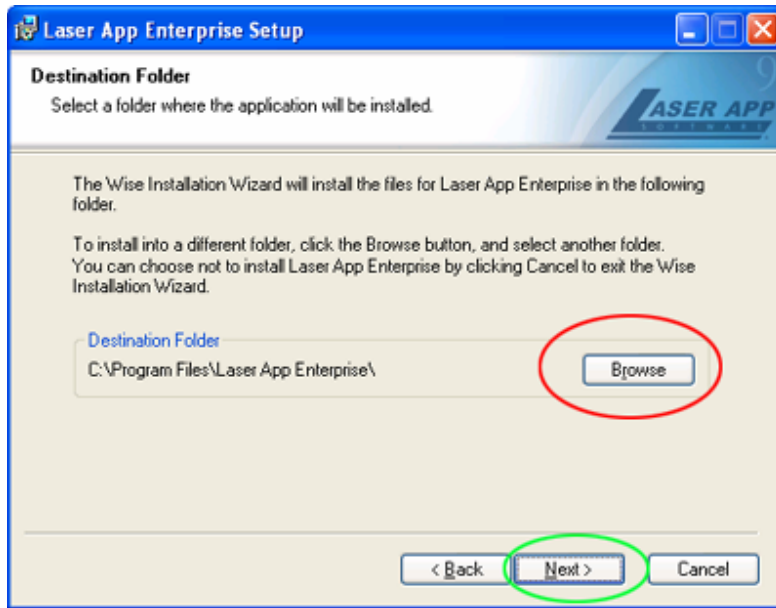
To begin installation close all running applications, then follow the steps below (Administrator level access is required):

1. From Windows Explorer double click the installation program file you downloaded. The setup program will start by displaying a welcome screen and then an end user license agreement screen. Click “*Next*” through these screens.
2. If you are the only person using Laser App on the current workstation or laptop choose to install “*Only for me*” in the User Information screen below:

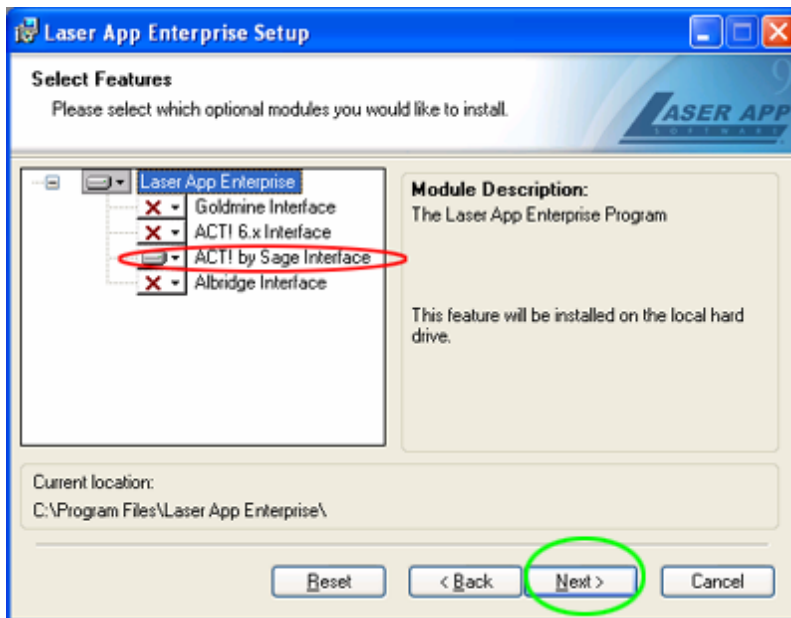


If you are installing for other workstation users select “*Anyone who uses this computer*” and click “*Next*”.

3. The next screen will allow you to choose the local destination folder for the installation. If you need to change the default destination click the “Browse” button (circled in red) and choose a new folder. *Note: you must select a subdirectory on a local hard drive only. DO NOT install to a remote, removable or mapped drive.* Finally, click “Next”(circled in green below) to continue.

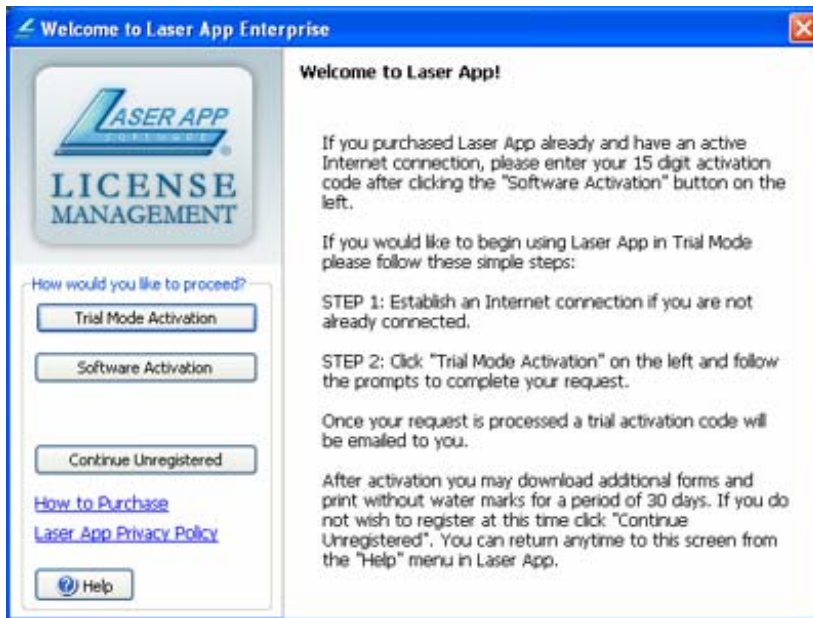


4. After clicking *Next* in the screen above you will see the “Select Features” option screen. If you have any of the programs and services listed on this screen you should toggle the option to install the appropriate module. In this case the ACT! By Sage module has been configured to install. You can also add or remove these modules at a later time by running a “Modify” installation from Add/Remove programs in Windows Control Panel. After making your selection (if any) click “*Next*” to continue.



5. You should now see the “Ready to Install Application screen (not shown). Click *Next* to begin the installation process, *Back* to make changes or *Cancel* to abort. When the installation is complete click “*Finish*” to close the install program.
6. On the first program start after installation you should see the following screen: (if you do not see the screen below click **Help**→**Program Registration & Activation** from the main menu).

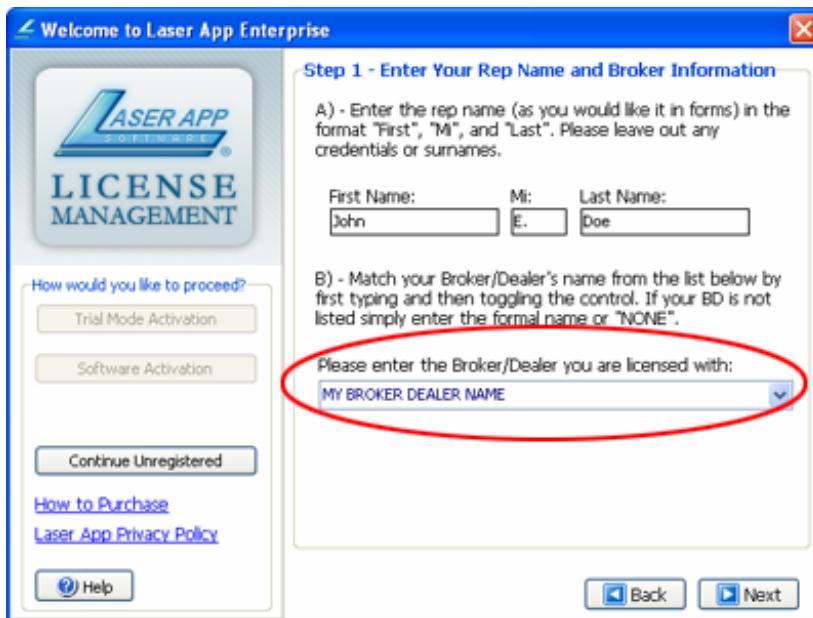
*Note: you must have an active Internet connection to activate the software. If you use a proxy server click to Continue Unregistered and enter that information by clicking Utilities →Program Settings →Proxy Settings.*



If you already have a 15 digit activation code (sent you by Laser App) click the “Software Activation” button, enter the code, and click “Activate Software”. Following activation you can install forms and use the major features of the program. Be sure to read over the documentation to familiarize yourself with features by clicking **Help** → **Laser App Help** from the program’s main menu.

Finally, if you will be evaluating Laser App and do not have an activation code, you can request a demo activation code by clicking the “Trial Mode Activation” button. You can also click “Continue Unregistered”, but you are limited to a single form “Sample Form”. Having a trial activation code allows you full access to massive online library of forms Laser App offers for a set period of time. To request a demo activation code follow these additional steps:

7. After clicking the *Trial Mode Activation* button you will be on the screen shown below:



Enter your First, Middle initial, and Last Name in part A. Be sure to use proper capitalization as you would like it printed on forms (leave surnames and credentials out of these fields as they are added at a later time). Next toggle your broker/dealer from the list circled in red. You can find the closest match by typing the name into that field, and then toggling the control. If you do not have a broker/dealer, or you cannot match yours on this list just enter “NONE”. Finally, if you have a promotion code enter it in the *Promotion Code* box, or leave this field blank. *Note: the*

promotional codes used here are not the same as those used in the Laser App online order form. Click “Next” to continue.

8. On the next screen (shown below) enter the office address information EXACTLY as you would like it printed in forms requiring a “Rep” address. When completed click the “Next” button to continue.

Welcome to Laser App Enterprise

**Step 2 - Enter your Rep Office Information**

Please enter your company name and office address. This information will be used as the "Rep Address" information in all your forms.

Company Name:

Office Address:  Ste.:

City:

State:  Zip/Postal Code:

Office Phone:  Phone Ext.:

How would you like to proceed?

[How to Purchase](#)

[Laser App Privacy Policy](#)

9. Enter your email address and confirm it a second time in the screen show below:

Welcome to Laser App Enterprise

**Step 3 - Enter Your Email Address**

Please enter your email address carefully below.

This address will be used to send you an activation code to purchase or evaluate Laser App.

Email Address:

Email (confirm):

How would you like to proceed?

[How to Purchase](#)

[Laser App Privacy Policy](#)

Click the “Get Activation Code” button. After a few seconds you will receive a message back saying an activation code will be emailed to you within minutes. The email will contain a 15 digit activation code that can be entered by clicking Help→Program Registration & Activation from the Laser App menu. Following activation you can download and install forms and begin using Laser App for the duration of the trial period.

*Note: If you have difficulties connecting from this screen we suggest you close the entire activation window by clicking “Continue Unregistered” and review your proxy-server settings from the “Utilities→Program Settings→Proxy Settings” menu in Laser App’s main screen.*

## Upgrading from Version 8.x

Laser App 9 Enterprise represents a major upgrade to previous versions of Laser App. If you have version 8.x installed you should backup your contact data from **Utilities & Options**→**Backup & Restore** (as per the instructions in version 8.x) and then completely uninstall before installing version 9.x.

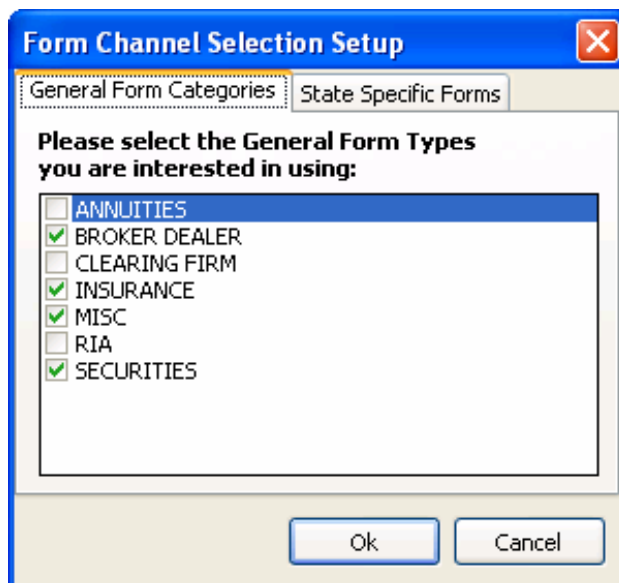
After installing and registering version 9.x you can download a utility module to convert your data and import your old contact backup file. Simply follow these simple steps:

1. Go to the Laser App website <http://www.laserapp.com/> and login in to the “User Downloads” section (link is in top right of the screen).
2. Download the dataconv.exe program into the Laser App 9.x program directory. By default this is c:\Program Files\Laser App Software\Enterprise.
3. Restart Laser App if it was running and from the **Utilities**→**Network & Database**→**Backup/Restore** menu choose “Restore”.
4. Browse to your contact data backup file from the old version and open it. Your contact data should be converted and restored to the new version 9.x format.

## Installing New Forms

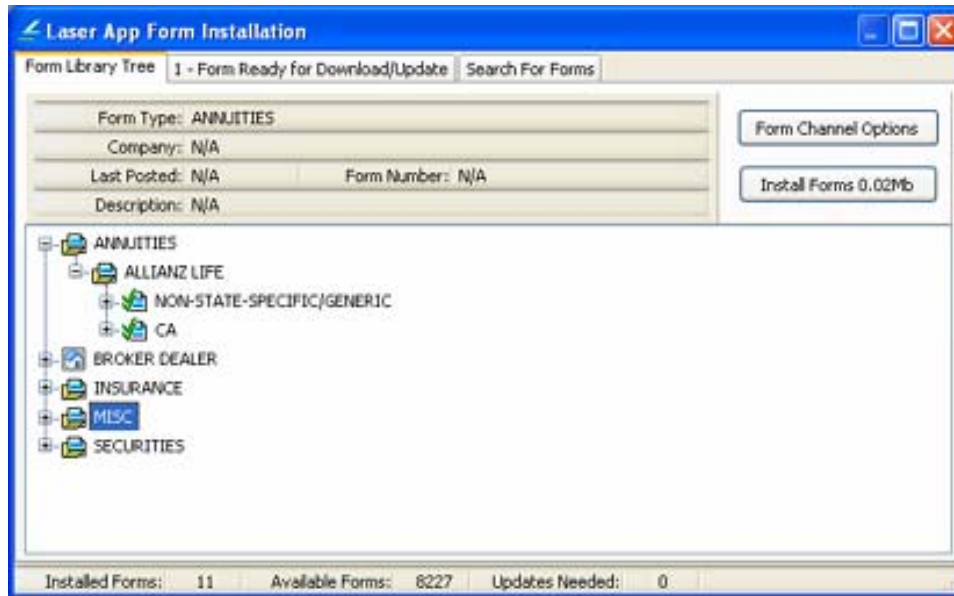
When you first attempt to install forms in Laser App 9 you will see a dialog window similar to that shown below. This dialog window can also be accessed from Program Settings at a later time.

1. To begin installing forms click **Utilities**→**Install & Update Forms** in the main program menu.



Laser App 9 uses “Form Channels” to ignore form categories you are not interested in and thus speed up form updating. From this initial configuration screen you should choose only the form types you are interested in. If you select insurance or annuities you will be presented with a list of states in a second tab.

Once your selection is complete Laser App will retrieve the appropriate form library in a three step process lasting a few seconds. You will then see the Laser App Form Installation window:



The form installation window is divided into three tabs (only two of which are visible unless a form is selected for installation). The first tab (shown above) shows the available and installed forms in a tree structure. Checking the tree nodes here selects forms for installation. Tree nodes representing forms that are already installed are shown with a green check icon and are not selectable. In addition, a “Search for Forms” feature has been added where forms can be selected for installation based on end-user searches.

2. Once the desired forms are selected click the “Install Forms” button to complete the installation process.

## Networking Forms and Data

Laser App is capable of sharing a common forms and/or contact data location on a server. It also includes an optional separate database server which can run on Windows or Linux as service/daemon. For further instructions on networking Laser App refer to the database server installation guide in the “downloads” section of “My Laser App” and the Help documentation from the main menu.

## Terminal Services & Laser App

Does Laser App work with Terminal Services/ Citrix etc.?

Yes, Laser App Enterprise supports “fast user switching” and multiple user profiles and should work with terminal services in a LAN environment (with the exception of some USB digital signature pads). However, because of the complicated and varying configurations inherent in these setups, our support staff are not allowed to assist you with any networking, printing, or configuration related issues. Only your network administrator is qualified to help you configure your terminal server.

Is Laser App well suited to this environment?

In short, the answer is “It depends”. Laser App is a graphics intensive program requiring more RAM than most service and small database applications. In this regard you are limited by the processor and memory resources on your server. Depending on how you have printers configured heavier network loads will be encountered during printing operations. This alone might eliminate practical access over dialup connections. Saving PDF files instead of printing may be preferable in such cases. We suggest you experiment by running several simultaneous sessions while monitoring the resources on your server as Laser App users load and print forms.

# Roaming Profiles and Laser App

Laser App Enterprise by default is a non-roaming application with large caches of form data stored in the non-roaming profile directories. This is by design, and we do not recommend using roaming profiles simply because (as with many other programs) of versioning conflicts that can arise. If you do use roaming profiles it will be necessary to activate and setup broker & rep data the first time you connect from a new workstation. Subsequent connections should not require activation and Broker/Rep data setup. We recommend using a terminal services setup without roaming profiles.