

Allied Financial Software Knowledgebase

4Advisors 3.0 Single User Installation Instructions

Act4Advisors v. 3.0 Requirements:

ACT! by Sage 2006 Standard or Premium v. 8.02+

ACT! by Sage 2007 Standard or Premium v. 9.01+

ACT! by Sage 2008 Standard or Premium v. 10.0+

[Click here to view requirements >](#)

Installation Instructions:

Install ACT! 8.02 or greater and be sure to open and run the ACT! software before installing Act4Advisors.

ACT! is sold separately and is required.

Unlock the Installation Program

Double click on the installation file and choose the OK button.

Highlight, copy and paste the Hardware Fingerprint into an email addressed to support@software4advisors.com

Body should contain the licensee s name and the hardware fingerprint, i.e.

Licensees Name: <name of person who purchased the software>

HWFP: <your eight digit hardware fingerprint>

You will receive an email back from support with the name and key.

This combination of name and key will unlock the installer on this computer. Once the installer is unlocked, you can reinstall the software on this computer without entering the Keycode.

Follow the installation prompts. You must agree to the License Agreement to continue.

You must agree with the license agreement. Read and choose **I Agree** if you want to install and use the software.

Enter the licensee s name and company.

Opening the Database

After the software has finished installing, open ACT! and click on File > Open. Choose the Advisor30.pad file.

If you are using ACT! 2007, ACT! will prompt you to update the software. Choose Yes.

ACT! will prompt you to backup the file before you open the database but this is not necessary to accept. Chose No.

ACT! will then update and attach the database.

After the database has been updated, ACT! will open the Act4Advisors database.

Login to the database

The first time you open the database, you will be prompted to login. Use the login name ME and no password.

The database will open as pictured below.

The main contact will be your My Record . Enter your personal information into this record keeping in mind that your login name is ME. You can set a password by clicking on the File menu and choosing Set Password.

You can now enter or import your data.

<http://kb.actforadvisors.com/questions.php?questionid=1>