

Allied Financial Software Knowledgebase

4Advisors 3.5144 Update

Compatible with ACT! by Sage 2008 (10.03) and 2009 (11.01 with hotfix)
Act4Advisors v3.5144 Update Files

Overview:

4Advisors Version v3.5144 includes some functionality changes in how we handle preferred mailing addresses. These changes require that you add two fields to your database and modify the new layouts to include these two fields. The two new fields have already been drawn onto the new layouts but the field you add to the database will not automatically be assigned to that field on the layout. As a result, you must edit the layout and select the new field.

Changes:

Preferred Mail Address now has buttons on the layout to choose the preferred address. You can also "Lock an Address" so that the global preferred address program does not overwrite your preferred mail address changes.

**Fixed closing error for ACT! users.

**Fixes the ability to customize toolbars.

**Additional tab called Other Info added with User Define Fields 1-10.

**Fix black box in Contact and Spouse field.

**Background imaging tiling on the Personal tab
**1280x1024 Screen resolution layouts now available

Caution:

Backing up is important. If you have modified the original 4Advisors layouts without renaming them, be sure to do so BEFORE you add the new layouts. These layouts will replace the original layouts but NOT the layouts that you have renamed.

Instructions:

1. Start by backing up your database. File > Backup > Database
2. After backing up, close ACT!
3. Plugin Update:

**Step 3 must be done all each workstation but the remaining steps are done only once.

4. Layout Update:

Download and Extract all files to

\Advisor30-database files\Layout folder

or \Advisor35-database files\Layout folder

5. Open ACT! and choose one of the new layouts, i.e. 4Advisors 1024x768.

6. Add two fields to your database named exactly as below. To add the fields, choose

Tools > Define Fields > Create Field

Field 1 - Name the first field 1MailUpdate and change the field type to a Yes\No field.

Field 2 - Name the second field 1MailName and leave the field type as Character and choose Next. Increase the length of this field from 50 to 75 characters.

Close the Add dialog box.

7. On the menu, choose Tools > Design Layouts.

8. On the Preferred Address, double click on the first field that is light blue. From the field list, select the field 1MailName and choose Add. Note: Uncheck "Include a Label".

9. Next, double click on the small box to the left of the preferred address. Select the field, 1MailUpdate and Add. Note: Uncheck "Include a Label".

10. Choose File > Save and repeat Steps for each layout.

11. To open a different layout, click on File > Open and select the layout you would like to update.

12. Repeat steps 10-13 until done with all of the layouts.

It should be noted that since the database and layouts are shared among all users, you only have to do these changes from one computer. All other users will see the changes.

Act4Advisors

<http://software4advisors.com>

Allied Financial Software, Inc.

<http://kb.actforadvisors.com/questions.php?questionid=12>