

Allied Financial Software Knowledgebase

Act4Advisors Layout is showing the contact field and the rest of the fields are missing.

Part 1. If you have recently installed ACT! by Sage on a new computer and after opening the shared database over the network the fields are missing, follow the instructions below.

Act4Advisors 3.0 Installation compatible with ACT! by Sage 2007 (9.0), 2008 (10.0), 2009 (11.0)

Step 1. Close ACT and download the installation file

<http://software4advisors.com/download/A4A3wsSetup.exe> Save this file to your Desktop

Step 2. Open/Run the file. It will say, "This software requires a security key&" Press the OK button.

Step 3. Highlight the Hardware Fingerprint with your mouse and Copy it via right mouse click.

Step 4. Click here to create the email to request the keycode.

Step 5. In the body section of the email, right click and Paste the Hardware Fingerprint. Type in the name of the licensee.

Keycodes will only be sent to the licensee and other employees or consultants who have been pre-designated.

We will generate a name/key provided by the hardware fingerprint. When you receive name and key repeat steps 1 and 2 and enter the info.

Part 2: After you are done with the Workstation installation, keep ACT closed - download and install the Act4Advisors Plugin.

Act4Advisors Plugin:

Close ACT. Download and Run:

Note: This installation will only install registry and program files. It will not install a new database. You must restore your database from backup first before installing this file or locate the shared database on the network after the installation. If you need further help on this issue contact support@software4advisors.com or you may call 770.475.9213 - support calls will require either a support contract or a support per incident fee.

CRM for Financial

ACT! for Financial

<http://software4advisors.com>

Allied Financial Software, Inc.

<http://kb.actforadvisors.com/questions.php?questionid=121>