

Allied Financial Software Knowledgebase

I am able to enter data in some fields but not in others - fields are missing

Question: I have Act4Advisors Open and I am able to enter data in some fields but not in others. The fields are missing on the Insurance tab, Investment tab, etc.. Why is this happening?

Answer: You may have the incorrect database opened. Only Advisor.dbf database can be opened with our layouts. Typically it is located in My Documents\ACT \Database\Act4Advisor 2.0\Advisor.dbf. If shared it should be located on the networked shared location for example Z:\Database\Act4Advisors 2.0\Advisor.dbf.

When you open the database for the first time, you will notice only 3 contacts. You can start entering new data or if you have an existing database -- you will need to import your existing data into Act4Advisors.

<http://kb.actforadvisors.com/questions.php?questionid=127>