

Allied Financial Software Knowledgebase

How to import data into Act4Advisors 3.0 from ACT! for Financial Professionals.

Question:

I am switching from ACT! for Financial Professionals (AFFP) to regular ACT! with Act4Advisors. How do I import my data?

Answer:

1. Backup your AFFP database using File > Backup > Database. This must be done in AFFP. Save the backup file to your Desktop.
2. Fully uninstall AFFP using Control Panel > Add/Remove Programs (in XP) or Control Panel > Programs and Features (in Vista).
3. Install ACT! by Sage as either the same or newer version as you AFFP software.
4. Open ACT! and choose File > Restore Database > Restore As. Pick the backup file in step one and name the restored database.
5. Open the restored database in ACT!. File > Open Database.
6. Close ACT!
7. Install Act4Advisors
8. Open the Act4Advisors database and follow the ACT! import instructions based on a single user database or multiuser database.

<http://kb.actforadvisors.com/questions.php?questionid=145>