

Allied Financial Software Knowledgebase

Additional or Missing Layouts, Reports, and Templates

We have created labels and envelopes to pull information from the Preferred Mailing fields. Also have corrected reported problems with the Birthday and Anniversary reports. See attachment at the bottom of this web page.

Close ACT.

Download and extract all files to Act4Advisors 3.0\Advisor35-Database files

Open Windows Explore and browse to Act4Advisors 3.0/Advisors35-Database files and double click on the folder Act4AdvisorsLayoutsReportsTemplates. Copy all folders to Advisors35-Database files. There will be a message about merging folders - press yes or ok.

<http://kb.actforadvisors.com/questions.php?questionid=15>