

## **Allied Financial Software Knowledgebase**

### **ACT! and Act4Advisors Upgrade Disclaimer**

Upgrading from ACT! 6.0 to a newer version of ACT! is not a technically difficult process but there are several steps necessary to ensure a successful upgrade.

The upgrade process is tedious at best and requires that you 1. Cleanup your old database by removing old and unneeded data. 2. Convert the database using the Custom Conversion Wizard. 3. Import the converted database into the new Act4Advisors database.

Allied Financial Software, Inc. will provide you with detailed upgrade instructions allowing step by step directions for going through the upgrade process. The upgrade instructions are provided at no charge to those customers who have purchased an upgrade from us.

For those customers who do not have the time or inclination to go through this process, we offer ACT! Upgrade Conversion Services. The service will allow up to 3 hours of upgrade work for a discounted consulting rate.

Single User Upgrade is \$300  
Multi User Upgrade is \$350

If more than 3 hours of work are needed, we bill the additional time at our normal ACT! consulting rate of \$150 per hour billed in 15 minute increments.

Additional time may be needed for reasons beyond our control including by not limited to: 1. The ACT! 6.0 database is corrupted and cannot be easily fixed with the ACT! Diagnostic Tool. 2. If you have added extensive customization that you would like us to recreate in the new Act4Advisors database. 3. You have missing files that you would like to reattach in the new database. 4. You have slow computers or computers that are being used by others while we are in need of those computers for the upgrade process.

Most conversions require the 3 hour time frame and it should be noted that we do not count the time it takes to import the data into the final database.

Allied Financial Software, Inc. and Act4Advisors do not control the import process which is a function of the ACT! software. Items beyond our control can add to the complexity and cost. In addition, ACT! may have conversion or import bugs that affect may the transfer of data.

All services provided by Allied Financial Software, Inc. are non-refundable since you are paying for our time to do the work. ACT! may have conversion or import bugs that affect the transfer of data.

Alternately, if you would like to attempt to convert the data yourself, we do provide email support at no charge. Optional annual telephone support is offered if you would like our assistance in peering into your computer and answering questions regarding the conversion or import process. The annual support does not allow us to do the work for you but to only assist you with doing the work yourself. Click here for more information regarding our support offerings <http://kb.actforadvisors.com/questions.php?questionid=158>

Important Note for Customers Using ACT! (6.0) or Prior: Customer activation and registration are required to use newer versions ACT!. Also, certain features may have changed or are no longer available, including inbound caller ID functionality, WinFax integration, recording and playback of macros, e mail/modem based database synchronization, and SideACT!. Also, newer versions of ACT! databases cannot be saved back to a

previous version.

<http://kb.actforadvisors.com/questions.php?questionid=161>