Allied Financial Software Knowledgebase

Act4Advisors 2 User Database (Server) Installation for 2010

Installation Instructions:

ACT! must be installed on all workstations including the server computer. The server can also be a workstation for a peer to peer network. Install ACT! by Sage 2010 and be sure to open and run the software before installing Act4Advisors. ACT! is sold separately and is required.

INSTALLING THE DATABASE

Unlock the Database Installation Program

Click Here: A4A2dbSetup.exe - Download and save to your Desktop.
Double click on A4A2dbSetup.exe and press OK.

Highlight, copy and paste the Hardware Fingerprint into an email addressed to support@software4advisors.com

Body should contain the licensee's name and the hardware fingerprint, i.e.

Licensees Name: <name of person who purchased the software>
HWFP: <your eight digit hardware fingerprint>

You will receive an email back from support with the name and key.

This combination of name and key will "unlock" the installer on this computer. Once the installer is unlocked, you can reinstall the software on this computer without entering the Keycode.

Follow the installation prompts. You must agree to the License Agreement to continue.

You must agree with the license agreement. Read and choose "I Agree" if you want to install and use the software.

Enter the licensee's name and company.

Choose your database location. The database can be installed on any drive but it must be first opened from the server computer where the database resides.

Opening the Database from the Server

You must open the Act4Advisors database from the server before any other user can login. After the software has finished installing, open ACT! and click on File > Open. Choose the Advisor35.pad file.

ACT! will prompt you to update the software. Choose Yes.

ACT! will prompt you to backup the file before you open the database but this is not necessary to accept. Chose No.

ACT! will then update and attach the database.

After the database has been updated and verified, ACT! will open the Act4Advisors database.

Login to the database

The first time you open the database, you will be prompted to login. Use the login name ME and no password. This "User Record" has full administrative rights to the database.

The database will open as pictured below.

The main contact will be the primary "My Record" which is a user record in the ACT! database. Enter personal information for the administrative user into this record, keeping in mind that the login name for this user is set at ME. You can set a password by clicking on the File menu and choosing Set Password.

Sharing the Database

To share the database with other users, open the database from the server and click on Tools > Database Maintenance > Share Database. The database will now be available to others to open.

Next, browse to the database location and copy the Advisor35.pad file into the database folder above it. This is the file that all users will access when opening the database.

This PAD file is not the database file but is a "pointer" file to the database. If this file does not work correctly, you can let ACT! recreate it or edit it manually with Notepad.

If you would like to recreate the PAD file to correct pointer issues, delete the PAD file in both folders. Next, open ACT! ignore any error you see or close the database, i.e. File > Close.

Next, click on File > Open. Change the file type at the bottom of the dialog box to "ACT! Database (*.ADF)" and select the Advisor35.ADF file. This will recreate the PAD file. At this point, you should copy the new Advisor35.PAD file into the database folder as noted above.

Adding Users to the Database

PLEASE READ! If you plan to import data from another ACT! database including those upgrading Act4Advisors, you should NOT add users following these directions. You should follow our instructions on Data Importing. If you are new to ACT! or are not importing data FROM another ACT! database with multiple users, follow the instructions below.

To add users to the database, click on Tools > Manage Users. You can create a user and set their login name and password or leave their password blank. Simply follow the wizard. The user can be set to "Active

Pending Logon" or "Inactive". Once each user has been set to Active Pending Logon, you will then be able to install Act4Advisors Workstation installation on that user's computer.

*Keep in mind that Act4Advisors has a license check program that will check the number of users in the database and compare this with the license level you have purchase. Do not add more Active users than you have licensed.

Also, to keep your data secure, we recommend that all users set a password once they start using the database.

If you have difficulty with this installation, feel free to contact Act4Advisors support at 770-475-9213. We provide 30 days free installation telephone support.

http://kb.actforadvisors.com/questions.php?questionid=180