

Allied Financial Software Knowledgebase

Act4Advisors Workstation Installation for ACT! v19 and v20

Act4Advisors Workstation Installation Instructions (READ CAREFULLY)

Step 1. Close Act! and download the installation file

Click here to Download save file to desktop.

Step 2. Open/Run the file as an administrator. Right click on the file and choose Run as Administrator. It will say, "This software requires a security key&" Press the OK button.

Step 3. With your mouse pointer, highlight the Hardware Fingerprint and Copy it via a right mouse click. The 8 digit hardware fingerprint is located right above where it is prompting you to enter in your Name and Keycode.

Step 4. Click here to create the email to request the keycode.

Step 5. In the body section of the email, right click and Paste the Hardware Fingerprint. Type in the name of the licensee and version of Act! you are installing for.

LEAVE THE KEYCODE INPUT WINDOW OPEN UNTIL YOU RECEIVE THE KEY BACK

Keycodes will only be sent to the licensee and other employees or consultants who have been pre-designated.

We will generate a name/key provided by the hardware fingerprint. When you receive it, enter or copy and paste it into the keycode input window.

Note: This installation will only install registry and program files. It will not install a new database. You must locate the database on your PC or the network after the installation. In ACT! choose File > Open Database. If you need further help on this issue contact support@software4advisors.com or you may call 770.475.9213 - support calls will require either a support contract or a support per incident fee.

Final Settings

Once Act! opens the first time, choose Tools > Preferences > Startup tab.

Change the Startup View to Contacts and OK.

Outlook Email Integration

Configure your Act! database to integrate your Outlook emails into the Act! History.

Choose Tools > Preferences > Email&Outlook Sync tab> Email System Setup button.

On Step 3 of the wizard, be sure to add your database as an addressbook. If an addressbook existings, remove and re-add.

Finish the wizard and restart Outlook.

<http://kb.actforadvisors.com/questions.php?questionid=233>