

Allied Financial Software Knowledgebase

How to run a birthday query in 4Advisors 3.0

In ACT, go to Lookup and choose Annual Events

Search For press the pulldown menu. You may select Birthdate (contact birthday), 1Child1DOB
1Child6DOB (Dependents birthday), and 1Birthdate sp (spouse birthday). Choose Current Month or Date
Range Press Find Now

At this point you can Print List and/or Create Lookup
Financial CRM Software, CRM for Financial
CRM for Financial, Financial CRM Software

<http://kb.actforadvisors.com/questions.php?questionid=54>