

Allied Financial Software Knowledgebase

How To Import Data Act4Advisors 1.5 to the new Act4Advisors 2.0 Database (Single User License)

Single User Act4Advisors Import

Please read and execute steps 1 and 2

Step 1. (Optional). Install Act4Advisors PreImport. This installs a program that will copy your dropdown menus from an existing Act4Advisors database to Act4Advisors version 2.0 Database.

Go to Start on your computer, Programs or All Programs,
find Act4Advisors and select Act4Advisors User Conversion.

It will ask for the location of your existing database and the location of the new database.

Please log in using the username and password from your old database.

Step 2. Now it's time to import your data..

To import your existing Act4Advisors data, open the New Act4Advisors database - location: My Documents\ACT\Database\Act4Advisors 2.0\Advisor.dbf.

Click on File, Data Exchange, Import. Be sure to pick the correct file type and browse to where your old Act4Advisors database is located (typically in this location: C:\My Documents\Act4Advisors\Advisor.dbf), Click on the NEXT button.

Select Load Map button, browse to C:\Program Files\A4A.

Which Map Should I Use?

Select this one : "Act4Advisors Upgrade.map"

THIS MAP IS ONLY GOOD IF YOU HAVE NOT MODIFIED FIELDS. If you choose this map, you will still have to map the rest of your data fields.

Very Important Note: Whether your "Map" file is located or not, you may still have to map data fields to the appropriate data fields in Act4Advisors. This is quite easy but it may take you a few minutes.

The left column of the contact map screen includes the data fields of your current database. The right hand side column includes the available data fields for Act4Advisors. Simply click in the boxes on the right hand side to choose a data field in Act4Advisors. BEFORE YOU CLICK ON THE NEXT OR FINISH BUTTON, SAVE YOUR MAP INCASE YOU HAVE TO REDO THE IMPORT. This will save you time.

For additional information on importing, consult with your ACT! documentation. If you require a consultant to import your data, feel free to contact us for a quote. If you are uncomfortable importing data, feel free to contact us for our Data Conversion Services. We often convert data from Bill Good, FDP, Brokers Helper, Advisors Assistant, EZ Data, dbCAMS, Junxure, Protracker, Brokers Ally, and even from other ACT! databases. Our fees are based on the time it takes to convert the data but the fees are very reasonable.

<http://kb.actforadvisors.com/questions.php?questionid=70>