Users Manual

dbCAMS+ Display System

for

Act4Advisors

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Overview

This system displays dbCAMS+ investment information within Act4Advsiors. It uses an ActiveX control to query the dbCAMS+ database in real-time when you click on the dbCAMS+ tab in Act4Advisors.

Installation

The installation of the software installs a registration shortcut on you desktop. You must register the software on your computer before it will run. To register, click on the "Register your Act4Advisors-dbCAMS+ Display System" icon on your desktop. Call Custom Advisor Solutions with User Name field on the registration screen. CASI will give you a Registration Key for your system.

After you register your system, close your Act4Advisors system and then start it up again. You should see a new tab at the bottom of the screen named "dbCAMS+". Clicking on this tab will display your dbCAMS+ information for the current Act4Advisors contact. If you switch to another Act4Advisors contact, you will need to click on the "Refresh" button to display the new information.

If you do not see the dbCAMS+ tab

The installation system installs a control file in the ... /Act/NetLinks/ folder. This is the default location for control files. If you do not see the dbCAMS+ tab in **Act4Advisors after you close ACT! and restart it**, then you probably have changed the default NetLinks folder. To find out the location of your NetLinks folder, go to the Act4Advisors system, click on Edit, select Preferences. Go to the General tab. On the right hand side of the screen, you will see a box labeled "Default locations". Select the File type of "Netlinks" from the pull down list. Write down the current folder. You will have to move the file named "casi359.ctl" from the current folder to YOUR NetLinks default folder. The casi359.ctl file should be in the .../Act/Netlinks folder. Please call CASI if you have any problems with this process. After you have moved the control file, shut down Act4Advisors and restart it. You should now see the dbCAMS+ tab.

The Display Process

The display system needs the dbCAMS+ client number to link the two systems together. This number is stored within Act4Advisors in the field named client_num. The ActiveX control takes the client number from the Act4Advisors client_num field and uses it to select the correct dbCAMS+ client. When you switch from one Act4Advisors contact to another contact, the display screen is not refreshed. There is a refresh button on the display screen. Clicking the refresh button will re-query dbCAMS+ and refresh the screen.

Maintaining the dbCAMS+ client number in Act4Advisors

The dbCAMS+ client number is populated into the Act4Advisors client_num field automatically if you use the Custom Advisor Solutions (CASI) conversion system to convert your dbCAMS+ database to Act4Advisors. If you convert your own database without the CASI conversion system, you will need to make sure you place the dbCAMS+ cltno field into the Act4Advisors client_num field. Any conversion is a one-time process so it does not maintain the field if you add new investment clients in dbCAMS+.

The CASI Synchronization System also populates the Act4Advisors client_num field. Since this system is run on a periodic basis, it will add any linkages that are missing when it runs. If you do not use this system, then you will have to add the client numbers in Act4Advisors manually as new investment clients are added in dbCAMS+. The Act4Advisors client_num field may or may not show on your Act4Advisors screens. If it does not show, then you will have to add the field to your Act4Advisors screen layout so you can manually maintain the client number.

Support

Support for this product is provided by Custom Advisor Solutions, Inc. Please call us at 410-675-7880.

