Support Tips

for

PracticeBUILDER
FINANCIAL

Client Relationship Management for Financial Advisors

Ed Morrow's

Text Library System

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Introduction

Welcome to the Support Tips section of Practice Builder Financial. These tips have been compiled from the records of our Support and Development Team as they have worked with thousands of advisors from all areas of the country.

We hope that you will find these tips helpful and easy to use. Please remember, however, that your Practice Builder support options include e-mail and telephone as well. Don't hesitate to contact us. We will thank you for the opportunity to be of service.

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Viewing Options

This publication opens with the navigation window displayed at the left. The window contains "Bookmarks" to assist in navigation. Use the appropriate buttons on the command bar to view Bookmarks or to collapse the window. You may also select these options under "Window" on the menu bar or you may click the Bookmarks tab at the side or top of the navigation window. Click on any Bookmark to go directly to that section of the publication.

Control the viewing size of the pages in this publication by selecting any one of the page buttons on the command bar. Options include full magnification, fit the page in window, and fit the visible width of the page in window. As an alternative, use the viewing selections under "View" on the menu bar. The zoom-in (magnifying glass) button on the command bar can be used to zoom in and out of any area on a page.

Use the Search button (binoculars) on the command bar to open a fully functional text search box. Enter the text to be found and click Find.

Adding Documents

Step 1: In Practice Builder Financial, click on **Tools** and select **Document Maintenance**.

Step 2: Choose the tab where you would like the document to be added.

Tip: Use the Marketing tab for letters you would like to add to the Marketing Module.

Step 3: At the drop down box named **Tab**: click on the arrow and select one of the **User Defined** options (not applicable in the Marketing, Seminar, or Business Records tab).

Step 4: Click on **Add** and Practice Builder will automatically assign an ID # starting at 700.

Step 5: Type in the **Description** (title) of your document along with the number of **Pages** and the **Synopsis**.

Step 6: Click the **Save** button.

Step 7: Click the **Review** button (where applicable) and MS Word will open.

a) Proceed to type in your document, or click **Insert-File** to locate your existing document. Include the body of the text only. The date, name, address, letter close, etc. will automatically merge when your letter is printed in Practice Builder.

b) When finished, go to **File-Save As** and save the file. The **File name:** box should default to the assigned Practice Builder document ID # and the **Save as type:** should be **Rich Text Format.**

Exporting and Importing Data

Read this entire section first. Time spent planning an Import or Export is an investment that will reward you many times over.

You may be faced with the exporting and importing of data for a variety of reasons:

- You may have just purchased Practice Builder and want to move contact information from your existing contact manager
    - This could be ACT!, Goldmine, Advisors Assistant, Outlook, Eudora or any number of other contact managers
    - You have received or downloaded a list from an insurance firm or an investment company that you wish to import into Practice Builder
- You may have just purchased prospect names from Financial Planning Consultants or another data mine
- You may have joined forces with another firm and want to add all the contacts to one system

This may be a one time transfer of data or it may be a process that you intend to repeat on a regular basis. Regardless of the frequency of your export/import and the source or destination, you have some important strategic decisions to make before you start. This checklist is designed to help you.

Our Technical Support Team is just an e-mail or phone call away. We are always happy to help you do it yourself, provide tips to make it easier and warn you of traps you'll want to avoid.

Additionally, we can do the import for you at a nominal fee. You may value this offer more highly after you go through the checklist below! Consider the value of your time and your level of computer experience before you decide whether this may be an attractive option. More on this later.

One word of warning: We cannot support your other software! Although we are familiar with many of these other products we don't have complete access to the commands on their systems nor do we know every aspect of the manner they are executed. Your best source for assistance with exporting from a particular system is from that system's Support Desk.

That having been said, rest a little more easily because almost every manufacturer has tried to make export and import easy to do. At FPC we have built into Practice Builder a "wizard" that will walk you through the process each step of the way.

Here are some of the considerations before you start.

Consider the Source

Export File. Usually, you will want to export (from your other software or from any other source) to a comma separated value (CSV) file. Other possible formats might be ASCII delimited or Text. Either will be acceptable if CSV is not an option.

Data Format. You will want to know the format of the data within the records you are going to export. Here's just one example of the issues you may face:

How many different ways can the contact name be recorded in the system and how will that match up with the format in Practice Builder? Your CSV file exported from software or purchased from a data mine source could use any of these formats.

Jonathan T. Sample
Sample, Jonathan T
Sample, Jonathan, T.
Mr., Jonathan, T., Sample
Mr., Jonathan, T., Sample, Jon,

Practice Builder uses many fields just for the different parts of a client name. Honorifics like Mrs. and Dr.; suffixes like Jr. and III; Nicknames and designations; all of these have their special field in Practice Builder. You may ask why the more extensive use of separate fields and the answer is to provide you with flexibility and personalization that is not possible otherwise. Practice Builder gives you the capability to address an envelope "Mr. Jonathan Sample"; but use the nickname "Jon" in the letter.

Depending upon the format of your file, or the export from your other software, you may have a little – or quite a lot of manipulation to perform on this data to get the results you want for your input.

This format issue extends not only to names but the addresses and all the other fields. If you are unsure of what changes you must make to your data just do a sample export and e-mail it to us. We'll take a look and tell you how easy it will be or what a problem you're about to get into!

Custom Fields. You may have one or more custom fields that contain important information. To retain this information and enable you to use it for Client Relationship Management (CRM) you may need to create and configure a corresponding Key Code in Practice Builder to accept the information. For example, your custom field titled "# Employees" could import into Key Codes for:

- EMP <20
- EMP 20-100

- o EMP >100

Logic Fields. You may also have Logic Fields (True or False) and those will map easily into a Key Code. The Key Codes must, however be **created inside Practice Builder before** the import. Once again, we can help you if you're not sure.

Consider the Destination

Importance of Backups. If you have current data (names in Practice Builder), do a backup prior to the import. If something goes wrong you can restore your data back to where it was before the import occurred. You may then restart your procedure after correcting the problem within the export file. The importance of backups extends to your other software as well. Before you start any import or export routine, be sure that no matter what happens you can get back to where you started.

> ***As we become ever more dependent on our computers and the data they hold, backups become a habit that must be practiced religiously. If you need help protecting this valuable asset by implementing a backup procedure please give us a call.***

Practice Builder Import Wizard. The wizard is designed to simplify your import and it will prompt you step by step. Additionally it allows you to perform other steps automatically. Some of the different functions are:

- Duplicate Checking – Especially important as your database gets larger
- Column Headings – Although you always want to use column headings (or field identifiers) you surely don't want to import these
- Notes - Notes can be imported into Practice Builder if you have them in one column of your import file
- Field Mappings – This function allows you to reuse a particular pattern that you have previously established and saved for a particular type of import
- Default Values – Automatically add information to each record as you import it. Assign an Advisor Name and Title, choose a Letter Closing, select the destination mail address, determine a Marketing Sequence and even space out the start dates for those Sequences

Consider Letting FPC Do It for You

It all may sound easy to you or incredibly complex, probably depending upon your experience level dealing with computers and databases. In any event, this business of manipulating data and sending it here or importing it there demands strategic thought **beforehand**. The actual import is the easy part.

If you have decided to do it yourself – we hope this document will be helpful. Be sure to call us if there is any aspect you need to clarify.

If instead, you prefer the option of someone else making this even easier - we stand ready to help that way, too. These are the three questions that are always asked:

- **How This Works?** You'll need to have the data whether it's exported from your other software or supplied by a third party. If you're not sure how to get the data, we'll try to help there too – but remember, that's not our expertise. The Practice Builder Support Team will help you e-mail the file directly to us. We will look at the file structure; determine the amount of work involved to manipulate the data and to add the items you wish to add as defaults into Practice Builder. We will ask lots of questions as we try to address all of the strategic planning issues that we discussed above. Then we'll send you an estimate including the time required and the associated fee.

- **How Long it Takes?** Of course, the amount of time required varies and there is no way we can tell you before we look at the data. We can tell you that many files are completed in less than a day and seldom does the whole process take more than a week. The most time consuming aspect is the correspondence, questions and answers with you, to be sure the result is what you need.

- **How Much it Costs?** Our fee for this service is $125.00 per hour of actual programming time. The clock doesn't run until we have all the answers to the variables we will ask and actually start to work on your file. The end result will be an e-mailed file (with a backup copy on diskette if you request it) ready for you to finish on your end and easy to follow directions for that step. Most files are completed in under four hours and many in less than two.

Practice Builder Data File Structure

Just for your reference, the importable fields in Text library System are shown here:

CLIENT / PROSPECT			SPOUSE / OTHER
Honorific	Business Address Line #2	Alumni Groups	Honorific
First Name	Business Address City	Religious Interests	First Name
Middle Name	Business Address State	Fine Art Interests	Middle Name
Last Name	Business Address ZIP Code	Office Refreshments	Last Name
Suffix	Business Address Country	Favorite Restaurant	Suffix
Nickname	Business Phone	Menu Preferences	Nickname
Designation	Business Phone Extension	Favorite Authors	ID or SS #
ID or SS #	Business Phone 2	Favorite Music	Birth Date
Birth Date	Business Phone 2 Extension	Other Preferences	Gender
Gender	Business Fax	Phobias & Dislikes	Smoker
Marital	Business Fax Extension	Personal Goals	Designation
Smoker	Business Fax 2	Career Goals	Wedding Date

CLIENT / PROSPECT			SPOUSE / OTHER
Send Mail to	Business Fax 2 Extension	Family Goals	Home Phone
Primary Address Line #1	Business Mobile	Gifts Made	Home Phone 2
Primary Address Box/Apt. #	Business Mobile Extension	Prior Attendance	Mobile
Primary Address City	Business Pager	Miscellaneous	Other Phone
Primary Address State	Business Pager Extension	User Defined 1	Pager
Primary Address ZIP Code	Business E-mail	User Defined 2	Business Name
Primary Address Country	Name Source		Job Title
Secondary Address Line #1	Referred by		Business Address Line #1
Secondary Address Box	Web Site		Business Address Line #2
Secondary Address City	Advisor Name & Designations		Business Address City
Secondary Address State	Advisor Title		Business Address State
Secondary Address ZIP Code	2nd Advisor Name & Designations		Business Address ZIP Code
Secondary Country	2nd Advisor Title		Business Address Country
Home Phone	Staff Associate Name & Designations		Business Phone
Home 2 Phone	Staff Associate Title		Business Phone Extension
Mobile	Letter Close		Business Phone 2
Other Phone	Marketing		Business Phone 2 Extension
Pager	Marketing Date		Business Fax
Home Fax	Seminar		Business Fax Extension
Personal E-mail	Seminar Date		Business Fax 2
Letter Salutation	Notes		Business Fax 2 Extension
Envelope/Label Salutation	Key Codes		Business Mobile
Document ID Description	Hobbies		Business Mobile Extension
Business Name	Sports Participant		Business Pager
Job Title	Sports Spectator		Business Pager Extension
Business Address Line #1	Organizations		Notes

Import Wizard

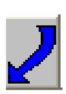
This feature enables quick and easy importing into Practice Builder from other software programs or files. These import files could be from databases, portfolio management software or even prospect names that you have purchased. You will be able to map the field matching structure and save this mapping for reuse with similar file structures.

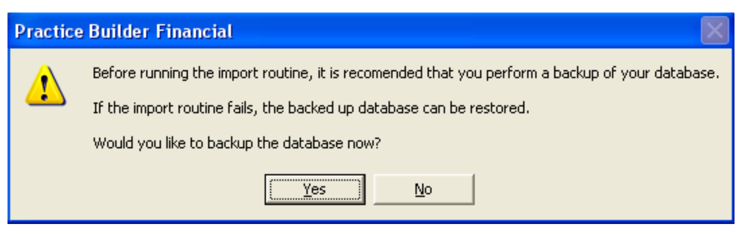
Before you begin, read all instructions first. Please be sure you have a current backup of your Practice Builder. This backup must be kept separate from your normal backups and remain unchanged until you are sure no unexpected modifications occurred. If you require assistance with backing up and restoring Practice Builder data, you may contact Practice Builder Customer Support.

Confirm the structure and content of the file you are about to import. Review the list of the Practice Builder available fields (above). You may want to add fields to your records for the Advisor Name, Advisor Title, Marketing Sequence, and Marketing (start) Date if there are to be a different Advisors or Marketing Sequences for some of the records. Adding this information will be easier at this point than to later modify individually in Practice Builder Financial. If there is to be only one Advisor Name or Marketing Sequence then the Import Wizard will handle this for you.

Using Microsoft Excel, place this information in new, separate columns added to the columns you already have. The Microsoft Excel spreadsheet will have to be saved as a CSV file to permit the Import Wizard to work. During the mapping stage you will direct the info information to the correct field.

Once you have your file ready to import, open Practice Builder and close all screens (**File – Close**)
To begin the import, select **File - Import Data - Import Wizard** or click on the Import Icon (Blue Arrow).

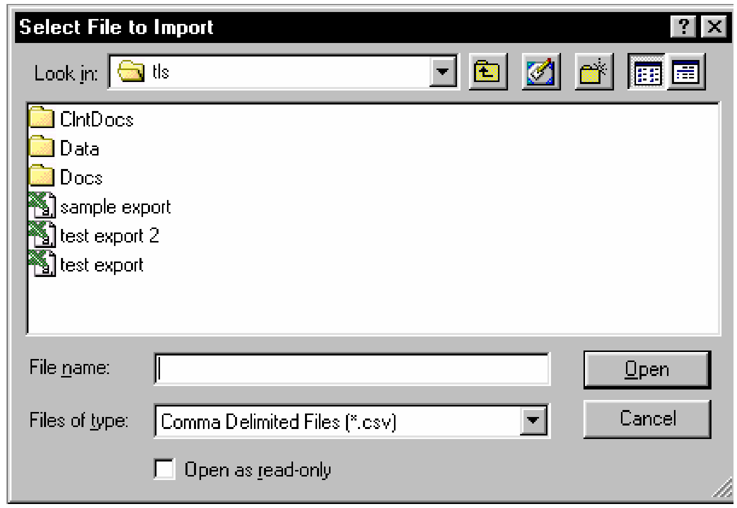




You will be asked if you would like to backup. Select **Yes** if you have not already backed up.

To start the import you will first be asked to identify and locate the file to import. Use **Browse** to locate the file, click on it and choose **Open**.

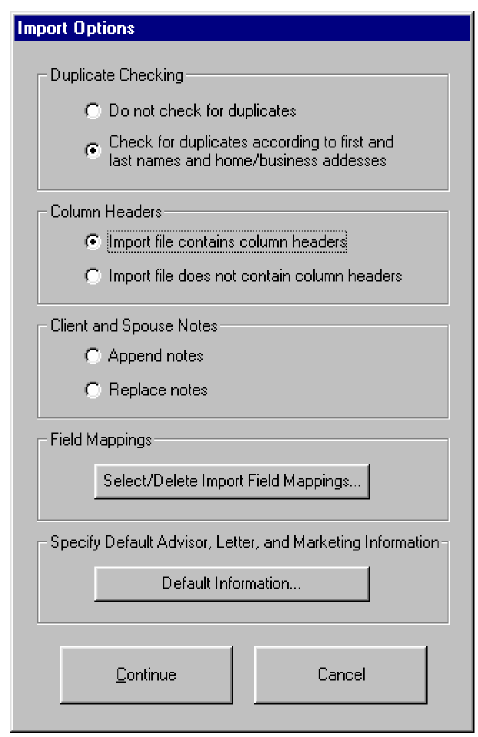
If your import file does not appear it may be because you failed to save it as a CSV file type.



The Import Options window will open.

The **Duplicate Checking** group box gives you the option to search for duplicate records in your existing Practice Builder database during the import routine. **Do not check for duplicates** creates a new record for every record you import. **Check for duplicates** will first evaluate each Client/Prospect record for a match by comparing the following fields:

1. Is there a matching Client/Prospect by ID or SS #?
2. Is there a matching Client/Prospect by First Name, Last Name, and Business Address Line #1?
3. Is there a matching Client/Prospect by First Name, Last Name, and Home Address Line #1?
4. Is there a matching Client/Prospect by First Name and Last Name? If so, is the first line of the Business and Home Address blank?

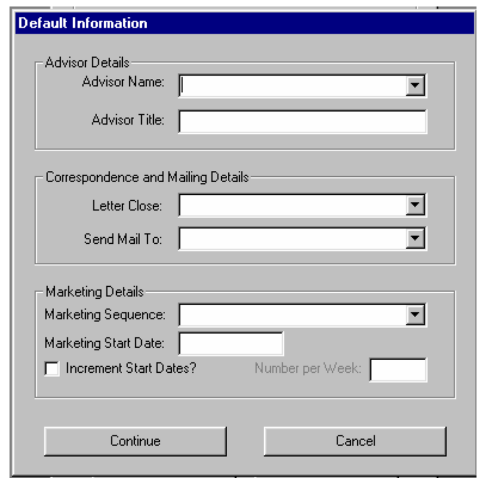


If the above four comparisons do not turn up a match, a new entry will be created. If the comparisons do turn up a match, then the new information (imported) will overwrite the existing Practice Builder record.

This is an important choice and should be carefully considered before going forward. The potential exists – depending on your choices – to erase valuable data or create unwanted duplicate entries.

The **Column Headers** group box allows for import files with or without headers that identify the information in the column, e.g. Last Name. Please note that headers will be required to enable the following **Client and Spouse Notes** option. Column headers will also facilitate easier mapping of fields that may be empty in some records.

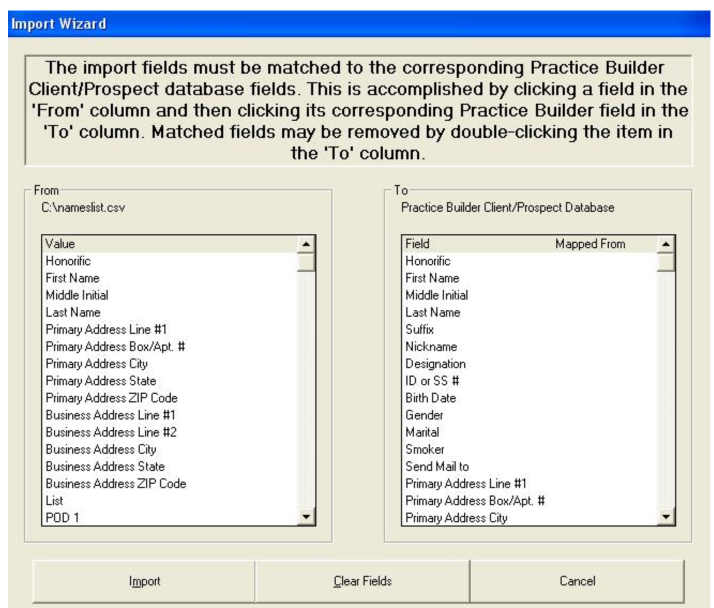
The **Client and Spouse Notes** group box applies only to duplicate records. In the case of duplicates this option allows for either Replace (overwriting) or Append (adding new at the end of the existing).



The **Field Mapping** group box allows you to select a previously saved map of fields (or to eliminate a map that may be incorrect or no longer needed).

The **Default Information** command button will open another window to allow you to create default values for the fields shown. It will further calculate incremental values for the marketing start dates if you wish to phase in marketing to a group of names over a period of time. You can, for example, import 500 names with a start date of today for the first 25 and a start date of 7 days from now for the next 25 and so on.

Continue will open the field mapping Import Wizard.

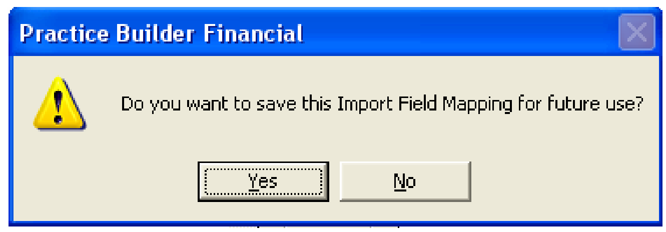


The desired Practice Builder field locations must be matched to the corresponding Import Fields of the import file. This is accomplished by clicking a field in the 'Import Field' column. That entry will then be highlighted yellow. Then clicking its corresponding position in the 'Field Location' column will clear the highlighting and move the field name to the Mapped From column. Matched fields may be removed by double-clicking the item in the 'Field Location' column.

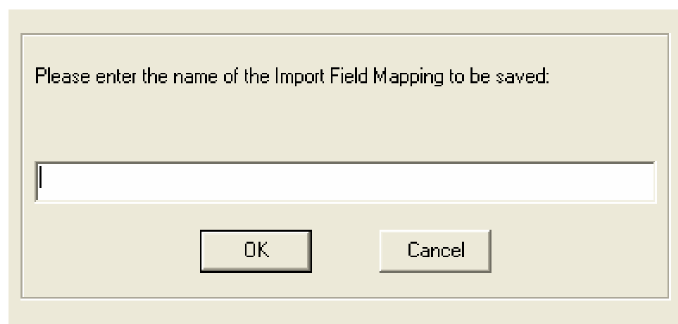
This process must be followed sequentially for every field that you wish to import. If you want to start over in the mapping process, click **Clear Fields**. If you decide not to import the data, click **Cancel**.

The Practice Builder Key Codes are listed last in the Client/Prospect Fields. These fields will accept a logic (Boolean) value ONLY. To import to these logic fields you must have a value of TRUE, T, YES, Y, or 1 to result in a check for that Key Code. FALSE, F, NO, N, 0 or blank will result in no check mark for that field. You may want to manually adjust these values in the import file before you import.

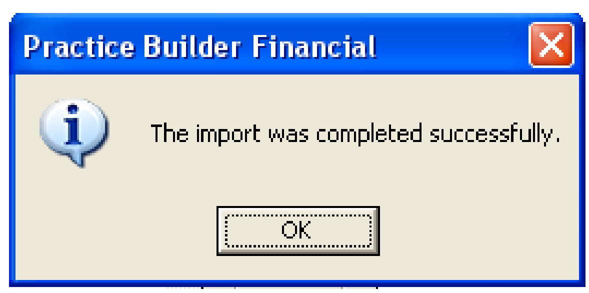
When the mapping is completed click **Import** to finish the process.



Then, if the mapping is a new one, you will be asked if you want to save the mapping. Saved mappings are helpful when you are pulling names from other software that will be a repeated process, or if you are often receiving a file with the same format.



If you want to save the mapping to use for another import, and your response is **Yes**, you will get an additional message.   This message is a prompt to save the mapping and give it a name.



After entering a name for your mapping, click **OK** and the import will begin. The mapping will be available for use at a future date.

Now that you have completed the import, be sure to check over your Practice Builder database for accuracy.

Remember that if you have a problem you can always restore from the backup that you made at the outset. Then you can correct the problem and re-import the data.

If you have any problems, please feel free to contact Customer Support for assistance.

Changing your Activation Key

If you were assigned a new activation key when you purchased an additional module or upgraded your version, you will need to change your activation key in Practice Builder Financial.

Step 1: Enter Practice Builder, click on **Tools** and select **Options**.

Step 2: Click on the **Licensing** tab.

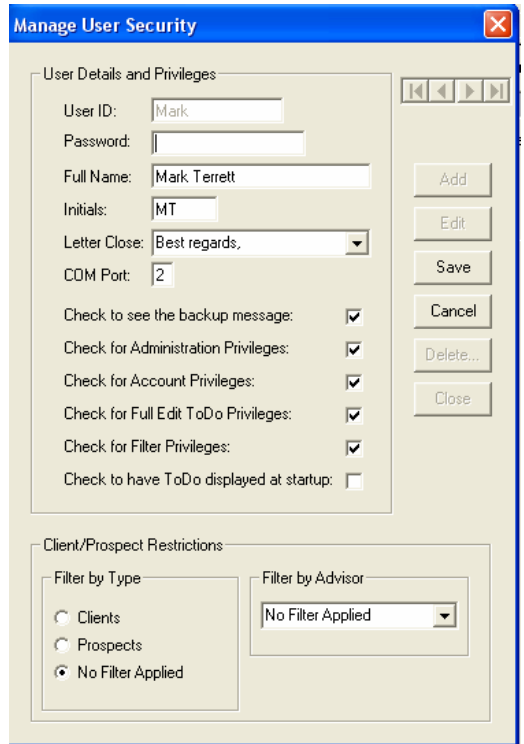
Step 3: Enter your licensed user name in the User Name text box.

Step 4: Enter your new activation key (exactly as shown, including periods and all digits) and click in the company box so that Practice Builder will accept the new key

Step 5: You must now exit Practice Builder and re-enter for the changes to take place.

Eliminating Login Screen-Windows 95/98

Step 1: Load Practice Builder and open the **Tools** menu, and choose **Manage User Security**. The **Manage User Security** window will appear.



Step 2: Use the arrows at the top right to scroll through Users.

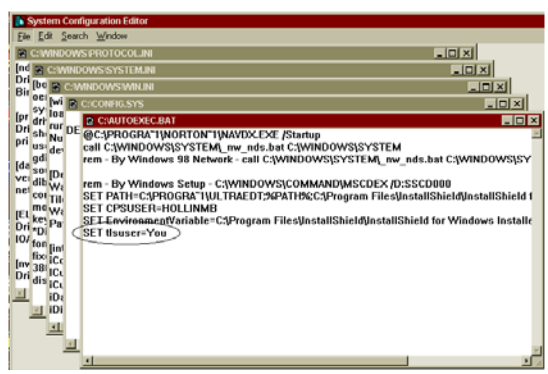
Step 3: Click the **Edit** command button and blank out your password.

Step 4: Choose a letter close from the **Letter Close** drop-box and then make certain that your cursor is in the **Password** text field before you press the **Save** button.

Step 5: **Close** the **Manage User Security** window and **Exit** Practice Builder.

Step 6: Click on the Windows **Start** button and click **Run**.

Step 7: In the **Open** text field type: **sysedit** and click **OK.** This will call up your **System Configuration Editor**.



Step 8: Type this command in the **autoexec.bat** window that opens: **set tlsuser=your User ID for Practice Builder Financial**

For example, if you enter 'You' as your User ID when entering Practice Builder Financial, the following line would be added to the autoexec.bat file: ***Set tlsuser=You***

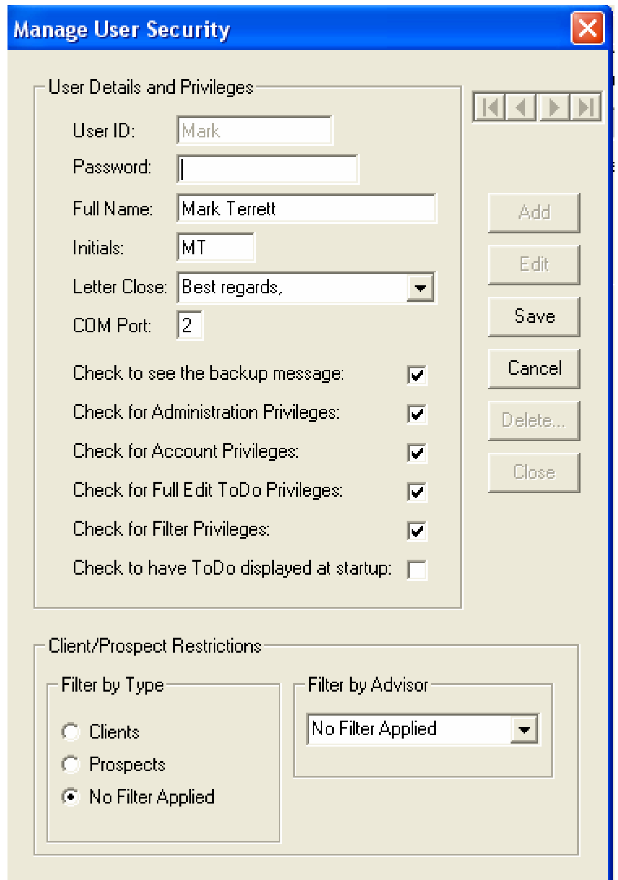
Step 9: Once the autoexec.bat file has been modified, **Save** your changes and **restart** your computer.

Double-click your **Practice Builder shortcut** icon and watch Practice Builder load instantly!

Eliminating Login Screen-Windows 2000/XP

The following instructions will enable you to remove the login screen and gain immediate access to Practice Builder Financial without any password protection other than what may be required to open your computer.

Step 1: Start Practice Builder Financial and select **Manage User Security** from the **Tools** menu.



Step 2: Use the arrows at the top right to scroll through Users.

Step 3: Click **Edit**.

Step 4: Take note of your User ID. You will need this information later.

Step 5: Delete your password in the Password text field.

Step 6: Select a letter close from the Letter Close drop-down list and click **Save**.

Step 7: Exit Practice Builder.

Step 8: Right-click the **My Computer** icon on your Desktop and select **Properties** from the shortcut menu.

Step 9: Click the **Advanced** tab.

Step 10: Click the **Environment Variables** command button.

Step 11: Click **New** under User Variables

Step 12: Type tlsuser in the Variable Name text field

Step 13: Type your Practice Builder User ID (exactly as you entered it in Manage User Security) in the Variable Value text field and click **OK**. You will now bypass the login screen when opening Practice Builder Financial.

Editing the Letters Templates

Prior to editing the templates, it is suggested that you make a copy of your current template (especially if you have changed it from the original) and save it under another name. To do this, open the template in each of the Letters and Service Modules, and click on File Save As. In the name of the file, assign a new name, for example clorig (short for client original). This must be saved as File Type: Document Template.

Step 1: Open Practice Builder and click on the green Letters icon.

Step 2: On the Letters screen, click the **Template** button to open the letter template in Microsoft Word.

Do not alter or remove any of the existing text (bookmarks shown below) in the template. These must remain or the system will not function correctly:

February 12, 1999

Honorific Firstname MI. Lastname Suffix Designations
Address Box
City, ST Zip
Country
Dear LetterSalutation:

Insertfile
Letterclose

Advisor

Instead:

To Change Margins- go to **File**, **Page Set Up**, and **Margins.**

To Add Headers or Footers- go to **View**, **Headers** and **Footers.**

Before you start tip: If you would like the header to be on the first page of your document only, please go to File-Page Set Up and select the Different First Page option **before** typing in your header/footer.

You may use the Header to replicate your stationary if you would like to print letters on plain paper. Or you can use the footer to add compliance information that may be required.

To Change Fonts- go to **Edit**, **Select All, Format, Fonts.**

Step 3: **Save** your changes and repeat these steps under the Service Letters icon.

Once you have edited the template. From each of the Letters and Service Letters one at a time open the template and select save/as and give the copy a different name. (For example Letters template might be named clnew and service sernew, again the File type should be Document Template.)

Then if you need to edit the template again for a one time letter you will have a copy that you can copy and rename it so that you are not always forced to recreate a new template.

Should your template files get corrupted beyond repair or if you just wish to restore the original starting point - there is an option in Practice Builder that will permit you to download the original templates.

Go to the **File** and select **Close**, then **Help** and **Download Original Templates**, and select the template that you need to download.

Creating a Desktop Shortcut / Icon

Step 1: Right-click on your desktop anywhere you do not have an icon; go to **New** and then **Shortcut.**

Step 2: At the Create Shortcut Screen, it will ask you for the path for Practice Builder. If you know the path you may enter it, or if not click on **Browse.**

Step 3: Locate your **TLS** folder and double-click on it.

Step 4: Once your TLS folder is open, you should see some folders and an icon for Practice Builder; double-click on the Practice Builder icon.

Step 5: You should now be returned to your Create an Icon Screen with the path of Practice Builder, now click on **Next**.

Step 6: Windows will ask you to name the icon; we suggest ***Practice Builder.*** After you have named the icon, click on **Finish**.

You should now have a **Practice Builder** icon on your desktop.

Adding Compliance Bookmark to Letters Template

Step 1: Open Practice Builder and click the **Letters** button.

Step 2: Click the **Template** command button. The Letters template will be brought up in **Word**.

Step 3: In **Word**, open the **View** menu and click **Header and Footer**. Dotted lines will appear at the bottom and top of the template outlining the now editable Header and Footer sections of this document template.

Step 4: Place your cursor in the **Footer** of the template and type the word **Compliance** (see Figure 1).

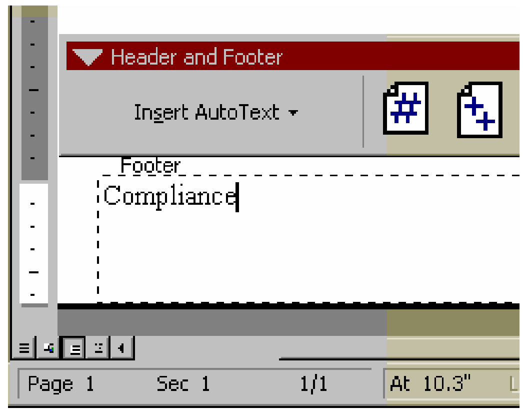


Figure 1. Typing the Bookmark in the Footer

Step 5: Press **ctrl+shift** and the **Back Arrow Key** to highlight this word.

Step 6: Open the **Insert** menu and click **Bookmark**.

Step 7: Type **Compliance** in the **Bookmark Name** Text Field and click the **Add** command button (see Figure 2).

Figure 2. Referencing the Bookmark

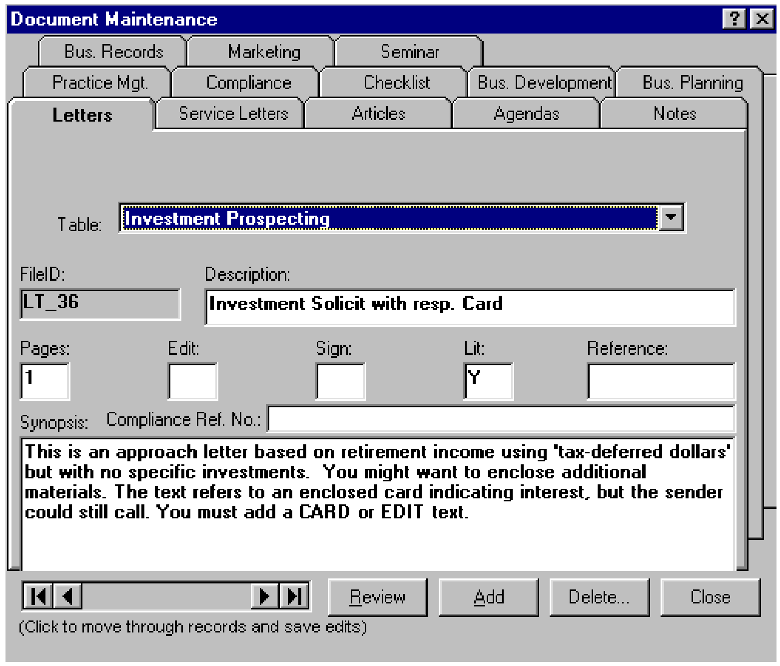
Step 8: Open the **File** menu and click **Exit**. Click **Yes** when asked if you would like to save your changes.

*Note: Refer to **Adding a Compliance Number to a Document** Support Tip to learn how to add compliance information to a specific document.*

Adding a Compliance Number to a Document

Step 1: Open the **Tools** menu and click **Document Maintenance**. The Document Maintenance window will appear.

Step 2: Choose a **tab** and a **table** under which you want to add the compliance number.



*For example: To add a compliance number to an investment prospecting letter, click the **Letters** tab and select **Investment Prospecting** from the **Tab:** drop-down menu. (Note: The tabs available for compliance numbers are as follows: Letters, Articles, Marketing, and Business Development.)*

Step 3: Next, use the **Navigation Keys** (arrow buttons at the lower left hand corner of the Document Maintenance window) to locate the document for which you would like to add a compliance number.

Step 4: Type your compliance number (field size is limited to fifty characters) in the **Compliance Ref. No.** text field and **tab** out of the field **to save**.

Removing the Read-Only Attribute

After copying files from a CD to your hard drive, the files will retain their read-only status. To remove the read-only status from the files in your tls\docs folder:

Single User Instructions

Step 1: Click **Start** > **Run**.

Step 2: In the Open text field type the word **Command**.

Step 3: Click **OK** and you will be taken into MS-DOS.

Step 4: If the drive letter displayed is not where Practice Builder Financial is installed, type the drive letter followed by a colon and press **Enter**. (Example: c :) If the correct drive letter is displayed, go to step 5.

Step 5: Type **cd\tls\docs** and press **Enter**.

Step 6: Type **attrib *.* -r** (be sure to press the space bar after "attrib" and "*.*") and press **Enter**. The cursor will flash on the line below the command line for a moment and then return to the [drive letter]:\tls\docs directory.

Step 7: Type **Exit** and press **Enter** to return to Windows.

Network Instructions

Step 1: Click **Start** > **Run**.

Step 2: In the Open text field type the work **Command**.

Step 3: Click **OK** and you will be taken into MS-DOS.

Step 4: Type the drive letter where Practice Builder is installed followed by a colon and press Enter. Example: z:

Step 5: Type **cd\tls\docs** and press **Enter**.

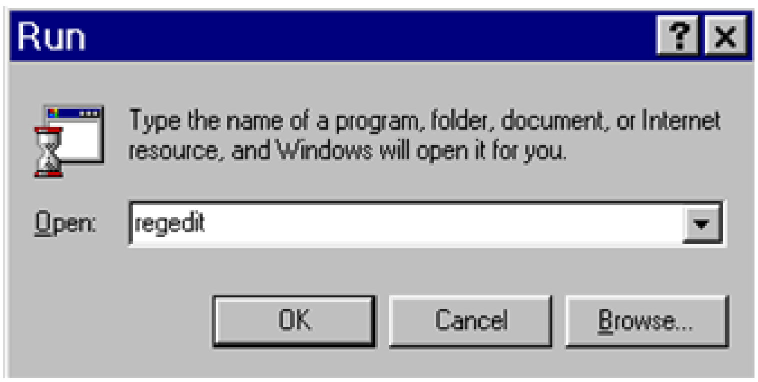
Step 6: Type **attrib *.* -r** (be sure to press the space bar after "attrib" and "*.*") and press **Enter**. The cursor will flash on the line below the command line for a moment and then return to the [drive letter]:\tls\docs directory.

Step 7: Type **Exit** and press **Enter** to return to Windows.

Editing Your System Registry

Step 1: Click **Start** on your desktop, and then click on **Run**.

Step 2: Type **regedit** in the Open: text box and click **OK**.



Step 3: Locate **HKey_Local_Machine** on the left hand side of your computer screen and double-click to open.

Step 4: Double-click on the **Software** folder.

Step 5: Locate the folder named **FPC**. Click on it once to highlight it and hit the **Delete** key on your keyboard. It will ask you if you want to delete the folder, click on **Yes** to delete.

Repairing Database

Practice Builder CD-ROMs contain a utility that can repair a damaged database. You may need this utility if you get an error message such as “ “Unrecognized Database” or “Invalid Database Format.”

To access this utility and repair your database:

Step 1: Insert your Practice Builder CD

Step 2: Click **Start** > **Run** > **Browse**.

Step 3: Locate and access your CD-ROM drive and open the **RepairDB** folder.

Step 4: Double-click the **repairdb.exe** file. You will return to the Run window and the Open text field should contain the text: [drive letter]:\repairdb\Repairdb.exe

Step 5: Click **OK**.

Step 6: Select the damaged database and click **Repair**.

a. The database that is damaged will appear in the error message you receive when you try to start Practice Builder Financial.

b. Example:

> An unexpected condition has occurred. You may attempt the continuation of this session by selecting Retry. Please report the following information to your Practice Builder Financial support person:
>
> Unrecognized database format ‘c:\tls\data\security.mdb’

c. In this instance the security.mdb file is the damaged file and the message indicates that it is located on the c: drive in the TLS subdirectory named Data.

Step 7: When the database has been successfully repaired you will receive the following message:

> The database has been repaired of any damages and compacted for optimization.

Step 8: Click OK.

You should be able to enter Practice Builder now without difficulty.

<u>What if I can't find any of my CDs?</u>

If you are unable to locate any Practice Builder CDs, you can use MS Access to repair the damaged database.

The error message you receive when you try to enter Practice Builder will tell you the location of the database that is damaged. (See example above.)

1. Use Windows Explorer to navigate to the damaged file and double-click to open it in MS Access.

2. Access will detect that the file has been damaged and you will be asked if you would like Access to attempt to repair the file. Click **Yes**.

3. Once Access has finished its work, try opening Practice Builder. You should be able to gain admittance without difficulty.

If neither of the above suggestions corrects the problem (or if the damaged file is tlssys.mdb, contact Practice Builder Support.

Uninstalling Practice Builder

Warning: This will delete all of your data and program files.

Step 1: Click on **Start**, **Settings**, and **Control Panel.**

Step 2: Double-click on **Add/Remove** Programs.

Step 3: Scroll down and find Practice Builder (or TLS).

Step 4: Select Practice Builder (or TLS) and click on **Add\Remove**.

Step 5: (It will ask if you are sure you want to remove Practice Builder (or TLS), click on Yes.)

Step 6: Practice Builder (or TLS) will now begin to uninstall. You may receive a message that your system is unable to remove some components, click **OK**.

Step 7: When it has finished uninstalling Practice Builder (or TLS), click **OK** on the Add/Remove Programs box.

Now we need to delete the TLS folder

Step 8: Double-click on **My Computer.**

Step 9: Double-click on the **drive letter** where you had Practice Builder (or TLS) installed (c: by default).

Step 10: Locate the directory where you installed Practice Builder or TLS (TLS by default).

Step 11: Click on the **TLS** folder once you have located it.

Step 12: Press the **Delete** key on your keyboard. You will be asked to confirm, click **Yes**.

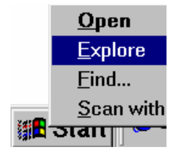
Practice Builder (or TLS) has now been removed.

Note: *If you are permanently removing your Practice Builder program from your system or changing drives, please refer to Editing your System Registry to ensure the FPC key is also deleted*

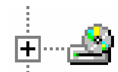
Copying the Documents through Explore

Step 1: Close Practice Builder and insert your Practice Builder CD in your CD-ROM drive.

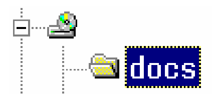
Step 2: Right-click on **Start**, and select **Explore**.



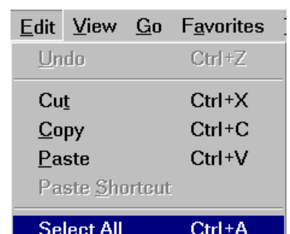
Step 3: In Explore, go to your **CD-ROM** drive and double-click on it; that will bring down the folders in the CD-ROM.



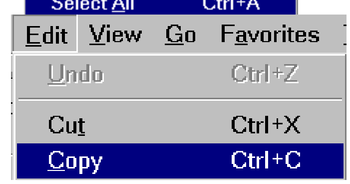
Step 4: Click on the **TLS** Folder, Click on **TLS** Folder again, then click on the **Docs** folder to open it.



Step 5: Once the Docs folder is open, click on **Edit** and **Select All**.

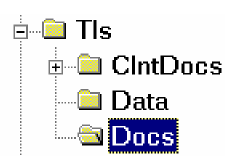


Step 6: Once the documents are highlighted, click on **Edit** and then **Copy**.

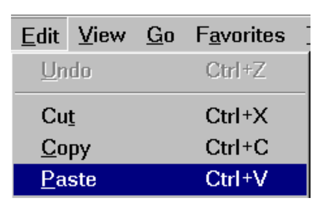


Step 7: Locate your **TLS** folder under the drive where Practice Builder is installed and double-click on it.

Step 8: Your TLS folders should now be displayed. Click on the **Docs** folder to open it.



Step 9: *Once the Docs folder is open, click on **Edit** and then **Paste**. Now your Documents will begin to copy into this folder. This may take a few moments.*



Note: Please refer to Removing the Read-Only Attribute from Practice Builder documents.

Creating Your Sequence

Add Your Marketing Sequence

Step 1: Open the **Marketing Module** and click **Add New Sequence** under **Sequence Maintenance**.

Step 2: You will be prompted for the name of your new sequence. Type in the name (such as **Clearcreek Teachers**) and click **OK**.

Step 3: A new blank sequence has now been added to Practice Builder, ready for your editing.

Add a Practice Builder Letter or Article to Your Sequence

Step 1: You can click the **Add** button to add a new letter and article to the sequence.

Step 2: You select letters/articles by **File ID** from the **Letters** and **Articles** drop-down lists.

Select Days

Step 1: Once you have selected the letter/article that you wish to add, you will need to enter the number of **Days** that you would like between the mailings. The first item should be day 0 to indicate that it is to be sent the day you start the client in the marketing sequence.

Step 2: Click **Save** and repeat the process until you have completed your sequence.

*Note: The days may be added 0, 1, 2, 3, 4, 5 6…indicating the order you want the letters to be mailed. When your Sequence is completed, go to the first item in the sequence, highlight it, and then click on **Increment Days** to the proper number of days you want for the mailings. The days **must** be entered in seven-day increments to use this function.*

Add a Custom Letter to Marketing

Many financial advisors wish to incorporate their own letters into the Marketing Module. The following will provide instruction on how to accomplish this. Once your letter has been added to the module, you will be able to add it to <u>any</u> of the marketing sequences.

Step 1: In your Practice Builder program, click on **Tools** and select **Document Maintenance**.

Step 2: Choose the **Marketing** tab or if the custom letter is one that you might want to use in other ways than just thru the Marketing Sequence, do not add it to the Marketing Folder, instead add it to Letters, and one of the Tabs within that. The letter will be easily accessible for editing and changing, and can still be used in Marketing.

Step 3: Click the **Add** button and Practice Builder will automatically assign a File ID # starting at 700.

Step 4: Type in the **Description** (title) of your Letter and click **Save.**

Step 5: Click the **Review** button and Word will open the new document.

Step 6: Proceed to type in your document, or click **Insert > File** and locate an existing document on your local disk or network drive.

Step 7: When finished, click **File** > **Save As** and save the file.

Step 8: The save box should default to the assigned Practice Builder document name and the file type should be **Rich Text Format (rtf)**.

Step 9: If the **File type** drop-down list does not have **Rich Text Format (*.rtf)** selected, select it before you click Save.

Note: Practice Builder only recognizes files saved in Rich Text Format.

Step 10: Exit Word and Close the Document Maintenance window.

Step 11: Open the Marketing Module and click **Add**.

Step 12: Select the letter you added from the **Letter ID** drop-down list and enter the number of **Days**.

Step 13: Click **Save**.

Adding Return Address to Envelope

If you prefer to use unprinted envelopes for your correspondence with contacts you will need to change the templates within Practice Builder so that your return address prints on the envelope.

Step 1: Open this file in Microsoft Word: tls\docs\envelope.dot

Step 2: Type your return address in the upper left hand corner of this template and save your work.

Step 3: Open the tls\docs\mktgenve.dot file in Word and do the same as step 2.

Step 4: Open the tls\docs\semenve.dot file in Word and do the same as step 2

If you have further questions, please contact technical support.

Key Code Maintenance

To assign a Key Code to a client/prospect, do the following:

Step 1: Open the client/prospect's record in Practice Builder Financial.

Step 2: Click the **Key Code** command button and the **Key Codes for Client/Prospect** window will appear.

Step 3: Check the checkboxes that apply to this client/prospect and click the **OK**.

For additional Key Code Maintenance tips, press the F1 key, click on index, type in Key Code and click on the entry when found. Press Esc to get out of the on-line help screen.

Printing Labels by Key Codes

To Generate Labels Using Key Codes

Step 1: Open the **Tools** menu and click **Global Processing** to open the **Global Processing Menu.**

Step 2: Choose the **Use Global Codes** option and the **Global Codes** menu will appear.

Step 3: Check the check boxes to specify the type of client/prospects for which you want to print labels and click **OK**.

Step 4: Now, back on the **Global Processing Menu** check the **Labels** check box and click the **Process** command button.

To **add a custom code** just click you mouse to the right of an unassigned check box and type your custom code.

(The custom code will now be available for all client/prospects.)

Printing a Client List by Key Codes

Step 1: Open the **Tools** menu and click **Global Processing.**

Step 2: Select **A Client**, for example, and click **OK**.

Step 3: Check the **Client List** check-box and click **Process.**

Note: If the Process button is not active after selecting Client List, Check and then uncheck the Letters check-box and then click Process.

Step 4: The Print Designation window will appear. Select **Print** to print the list or **Preview** to review the list before printing. You may print the list after previewing it by clicking the **Printer Icon** in the Preview window.

Printing Special Items for All Clients/Prospects

Assigned to a Marketing Sequence

You may want to send your company newsletter to all clients/prospects assigned to a particular sequence and you need labels to get the job done. Or you may want to send them a special letter and article that is not part of the marketing sequence to which they are assigned. In either case, the Services and Results dialog will help you complete the task.

To create a special item for all clients/prospects assigned to a sequence:

Step 1: Open the **Marketing Module**.

Step 2: Select a sequence from the **Current Sequence** drop-box.

Step 3: Click the **Services and Results** command button under **Sequence Details**.

To create letters and/or articles:

Step 1: Select the items you want to print. You may select the Create **a letter for all persons in this sequence** option button and/or the **Create an article for all persons in this sequence** option button.

Step 2: Then pick the document by **File ID** from the drop-down lists provided.

Step 3: Once you have made your selections, click **Process**.

To create envelopes or labels:

Step 1: Select the **Create envelopes/labels for all persons in this sequence** option button.

Step 2: Click **Process**. The **Envelopes & Labels** window will appear.

Step 3: Select either **Envelopes** or **Labels** under **Create**.

Step 4: Once you have made your selection, click **Process**.

Re-Running Last Marketing Sequence

To run the last sequence you processed, do the following:

Step 1: Open the **Tools** menu and click **Marketing>Rerun Last Marketing Cycle**.

Step 2: Choose the items that you would like to rerun by checking the appropriate check boxes.

Step 3: Under the **Process** section, choose **Individual Sequence** then pick the sequence you ran last from the **Please choose the sequence** drop box.

Step 4: You will be asked if you want to send the documents directly to the printer. Click **Yes**.

NOTE: you may re-run Marketing for your sequence, starting with any client number.

For example, you ran marketing and client number 000035 printed a good article, and you know that others did not. You can re-run your marketing, select Start with client prospect having _____number. Type in 000036. Then select articles and Process. You will print articles for just those who did not get a good print.

Adding a Picture to the Letters Template

Step 1: Open the **Letters** section of the program and click the **Template** command button.

Step 2: Once the template is open, open the **View** menu (in **Word**) and click **Headers and Footers**.

Step 3: Then open the **Insert** menu and choose **Picture** > **From File**.

Step 4: Select the picture you wish to insert and click **Insert**.

Step 5: **Exit** Word and **Save** your changes.

Adding a Signature File

To add a signature file, you must first have a digital copy of your signature. To do this you will want to write your signature on plain white paper and scan that image into your computer as a digital image. If necessary you can clean up the signature or enhance it with your digital photo editing software.

Practice Builder uses the template process in Microsoft Word to produce letters. You may edit the templates by opening the **TLS Docs** folder in Microsoft Word, or by clicking the **Template** button in the L**etters** section of Practice Builder.

Before you modify your templates, we do recommend that you make a backup copy of your **Client.dot** and **Service.dot** templates. You can do this by opening the TEMPLATE in the Letters Module, and Selecting SAVE AS, and giving the template a new name. Example: Joe. You will then have a backup copy of Client.dot named Joe.dot (the.dot extension is added by Word when you save the file in the template format).

Once you have a digital image of your signature, move your cursor in the blank area between the Letter close and Advisor field in the template. Left-click to establish your cursor. On the Word menu click on **Insert, Picture, From File**. You will then get a **Look** in box to locate your signature file.

Once your file is located, click **Insert** and **Save** your changes.

You may want to repeat these steps for **Service Letters** (yellow icon), which can be done by clicking on the **Template** button in the Service Letters section, or by opening the **Service.dot** template in Microsoft Word.

You can obtain additional information on editing documents by consulting the Help menu in Microsoft Word.

If these templates are corrupted

If you have not saved a copy as a backup, you should call Support for assistance.

If you have saved a copy of the template as suggested above then you may Click on Firm Info on the Client Prospect Home Page, then click on Advisor list, and for the Advisor you have assigned to Jon Sample, type the word Joe under the heading of Letters Template.

Go back to the Letters Module and open the Template, click on File Save As, and give the template the name of Client.   Now you can go back to the Firm Info Button, Advisor List and type the template name client back into the column labeled Letters Template.

The result of this is renaming your copy, named joe.dot, to client.dot which Practice Builder is looking for.

Specifying the Envelope Print Destination

If you want to change the default settings for envelopes (how they print, either manually or to a specific tray) do the following:

Step 1: Open **MS Word**.

Step 2: Click **File** > **Open**.

Step 3: Select **Document Templates** from the **Files of type** drop-box.

Step 4: Navigate to your tls\docs folder on the drive where Practice Builder resides.

Step 5: Open an envelope template (there are two envelope templates, **envelope.dot** and **mktgenve.dot**. One is the global template the other is the marketing envelope template)

Step 6: Open the **File** menu and select **Page Setup**.

Step 7: Click the **Paper Source** tab, make your changes and click **OK**.

Step 8: **Save** your changes and **Exit** MS Word.

Editing the Envelope Templates

Add Your Return Address

You can modify the Practice Builder envelope templates to fit your practice.

To add your return address to an envelope template:

Step 1: Open **Word**.

Step 2: Open the **File** menu and click **Open**.

Step 3: Select **Document Templates** from the **Files of type** drop-box.

Step 4: Select the drive letter where Practice Builder is installed from the **Look in** drop box. Locate and double-click the **TLS** folder.

Step 5: Then double-click the **Docs** folder. You will see all the templates used by Practice Builder. Locate and double-click the **mktgenve.dot** (for envelopes processed with marketing materials) or **envelope.dot** (for envelopes produced through Global Processing and on the Client/Prospect screen) file.

Note: If you see a file called mktgenve and it doesn't have the file extension .dot, don't worry this just means that Windows Explorer isn't configured to display file extensions.

Step 6: Once the template is open you will see a cursor flashing in the upper left-hand corner of the document. Type your return address here.

Step 7: When finished, **Save** your changes and **Exit** Word.

Changing the Font

Step 1: Open **Word**.

Step 2: Open the **File** menu and click **Open**.

Step 3: Select **Document Templates** from the **Files of type** drop-box.

Step 4: Select the drive letter where Practice Builder is installed from the **Look in** drop box. Locate and double-click the **TLS** folder.

Step 5: Then double-click the **Docs** folder.

Step 6: You will see all the templates used by Practice Builder. Locate and double-click the **mktgenve.dot** (for envelopes processed with marketing materials) or **envelope.dot** (for envelopes produced through Global Processing and on the Client/Prospect screen) file.

Note: If you see a file called mktgenve and it doesn't have the file extension .dot, don't worry this just means that Windows Explorer isn't configured to display file extensions.

Step 7: Open the **Edit** menu and click **Select All**.

Step 8: Open the **Format** menu and click **Font**.

Step 9: Make your selections in the **Font** dialog and click **OK**.

Step 10: **Save** your changes and **Exit** Word.

Removing Bar Codes from Envelopes

To remove the barcode from an envelope template:

Step 1: Open **MS Word**.

Step 2: Click **File** > **Open**.

Step 3: Select **Document Templates** from the **Files of type** drop-box.

Step 4: Navigate to your tls\docs folder on the drive where Practice Builder resides.

Step 5: Open an envelope template (there are two envelope templates, **envelope.dot** and **mktgenve.dot**. One is the global template the other is the marketing envelope template)

Step 6: Note: If you receive a message that says Word can't find the data source for the document, click Options > Remove Data Header Source and move on to step 6 below.

Step 7: Once the template is open, highlight the barcode and delete it. (You may either press the **Delete** key on your keyboard, right-click and select **Delete** from the **shortcut menu**, or open the **Edit** menu and select **Delete**.)

Step 8: **Save** your changes and **Exit** MS Word.

Removing Return Address from Envelope

You want to remove a return address that you have added to a Practice Builder envelope template?

Here's how:

Step 1: Open **MS Word**.

Step 2: Open the **File** menu and click **Open**.

Step 3: Select **Document Templates** from the **Files of type** drop-box.

Step 4: Navigate to the **c:\tls\docs** folder and you will see the templates used by Practice Builder displayed.

Step 5: Open the envelope template you wish to edit (**envelope**.dot or **mktgenve**.dot).

Step 6: Delete your return address from the template.

Step 7: **Exit** Word and answer **Yes** when asked if you would like to save your changes.

Making Permanent Edits to Documents

To make a permanent edit to documents in Practice Builder:

Step 1: Enter the Letters, Articles, or other section of the program containing the document to which you want to make a permanent change.

Step 2: Click one to highlight the document you wish to edit.

Step 3: Click Text Copy call the document up in Word to make your edits.

Step 4: Make the desired changes and close MS Word.

Step 5: Click Yes when asked if you would like to save the changes you have made to the document.

Setting a Memo/Appointment Reminder

To set an appointment reminder from the Memo section of the program:

Step 1: Click the **Memo** command button.

Step 2: Select the **Add** option button.

Step 3: Type the details in the **Comment** text field.

Step 4: Click **Save As** and check the **Memo Only, Memo/Appointment, Memo/Task or Memo/Appointment and Task** click Save

Step 5: Select the **Start time** and an **End Time** for the appointment. Save

Step 6: Check the **Reminder** check-box and select the number of minutes before the appointment start time that you want the reminder to appear.

Step 7: Select the **Completion Date** for the Task. Save.

Step 8: Close the Comments box.

Backing Up, Restoring or Moving Data

Importance of a Backup Routine

Does it seem to you that as we rely on our computers more and more, the more vulnerable they become? And of course there seems to be no limit to the number of viruses, Trojan horses, and spam; without even mentioning the other hazards like electrical fluctuations, fire, flood or theft.

Backup is the only lifesaver on this ocean of problems. Significant changes in the Practice Builder backup have been implemented over the past few releases – all designed to make your backup procedure easier and more effective. You do have a procedure, right? One that protects all of the information that is vital to your practice? Call us if you need help!

At the minimum, this procedure should involve regularly scheduled backups of all critical information stored on your computer and periodically removing that backup to a safe, off-premise storage. For example, you may back up to a different computer or hard drive on a daily basis and on an additional weekly schedule, backup to a tape drive and then take the tape home with you.

Also essential is a regular test of the backup procedure to ensure that the data is actually usable and correct. This may consist of testing the data by restoring from backup monthly.

To backup Practice Builder data:

Step 1: Open Practice Builder, then Select **File** – **Close**.

Step 2: Select **Tools** - **System Utilities** - **Backup**. Select the type of backup you want to perform and then click Continue You may select from the following types:

1. **Data** to backup client/prospect data
   The backup file created will begin with TLS_DATA_FULL_.

2. **Documents** to backup the main documents
   The backup file created will begin with TLS_DOCS_FULL_.

3. **Client/Prospect Documents** to backup the documents merged for each client/prospect.
   The backup file created will begin with TLS_CLNT_FULL_**.**

4. **Data, Documents, and Client/Prospect Documents** to backup all three above.
   The backup file created will begin with TLS_ALL_FULL_

NOTE: The date and time of the backup will be included at the end of the file name.

Step 3: Select the location to store the backup files and click **Backup**.

Step 4: If you have a previous backup in that location you will get a message asking if you want to overwrite the previous file. If you select **Yes** then the file you are creating will be placed there and the previous file will be deleted. If you Select **No**, the backup will abort and you will have to identify the folder you want to place the backup into and start over.

Step 5: Once the backup is completed, select **OK**. To re-open your client/prospect records, select the first icon on the Left of the Icon Bar.

Restoring Data from a Backup.

Step 1: If the backup file is located on removable media, insert that media into the appropriate device

Step 2: Open Practice Builder and select **File** - **Close**.

Step 3: Select **Tools -System Utilities - Restore**.

Step 4: Select the type of restore and then click **Continue**.

Step 5: The type of restore you select will depend entirely upon the type of backup you have previously performed. See Step 2 of Backup Procedure above.

Step 6: Locate the backup file and click **RESTORE**.

Step 7: You will receive a message "*To insure data integrity restoring a backup will end this session. If you continue with the restore, please be sure it is completed before restarting. Do you want to continue with the Restore?*" You must select either **Yes** or **No**. **Yes** runs the restore and logs you out of Practice Builder. **No** aborts the restore and returns you to the Practice Builder Screen.

Step 8: When the restore is complete, Practice Builder will close. Reopen Practice Builder and your restored data will be shown.

Locating Practice Builder Files

The default location for all Practice Builder Financial files on a stand-alone computer installation is the TLS Folder on the root directory of the hard drive (usually c:\TLS).

In any network installation of Practice Builder, you will specify the location of the files (perhaps your G:\ or F:\ directory) but again all the files will be within a folder called TLS. The acronym is for Text Library System, the original system, created in 1983, from which Practice Builder Financial evolved.

For any installation, the TLS folder should contain the following Practice Builder Financial files and subfolders:

Data (folder)

- *Contains four database files used by the system*

Docs (folder)

- *Contains the original body text (in Rich Text Format) of all Practice Builder documents (before being merged or used with any client information).*

Clntdocs (folder)

- *Contains the actual personalized documents you have created and used with each contact.*

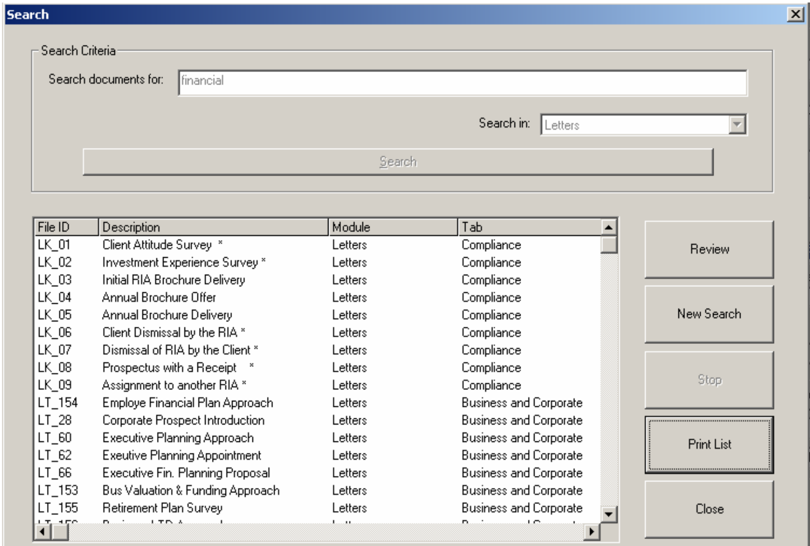
Searching Documents

The Search Routine can be accessed by clicking the Practice Builder toolbar search icon or by selecting **File – Search**.

Each method will display the Search window.

Type a short phrase such as “fiscal year” into the **Search documents for** text box.

Use the **Search in** selection box to search for the phrase in a particular module. Selecting **All Documents** may take longer to search than smaller selections.



Click on the **Search** button to begin.

The results of your search will be displayed. You may highlight a document and then select **Review** to display it within Word, Print the List, or perform a New Search.

Selecting **Print List** will provide a report that includes the File ID, Description, and the Module where the document is located, and the tab within the module where the document is stored.

Advisor Name (for Letters)

To assign an advisor name to a client/prospect that will appear at the bottom of letters sent to that client/prospect, you must select the name from the Advisor Name (for letters) drop-down list on the Client/Prospect tab.

If the name you want to assign to the client/prospect is not a choice in the list, you may add it through the Advisor List dialog.

To access this dialog:

Step 1: Click the **Firm Info** button on the Client/Prospect tab. The Firm Information dialog will appear.

Step 2: Click the **Advisor List** button and the Advisor List dialog will appear.

Step 3: Type the advisor name in the Advisor Name column. Include any designations in this column, also, immediately following the name.

Step 4: If you want a title (or any other type of information) printed beneath the advisor name at the bottom of letters, enter this information in the Title column.

Step 5: When finished click **Close** to exit the Advisor List dialog and click **Close** to exit the Firm Information dialog.

You will now be able to select this advisor name from the Advisor Name (for letters) drop-down list.

The number of Advisor Names you can add to your system is dependent upon the license you own.

Editing Marketing Letter / Article Content

Change the Content in Marketing Letters and Articles

Step 1: Open the Marketing Module.

Step 2: Select a sequence from the **Current Sequence** drop-down list.

Step 3: Click to highlight the letter and/or article you wish to edit.

Step 4: Click **Edit**.

Step 5: Click the **Preview** button next to either the **Letter ID** or **Article ID** drop-down list to bring the document up in MS Word.

Step 6: Make the desired changes and **Exit** Word. Click **Yes** when asked if you want to save your changes.

Step 7: Click the **Save** button on the Marketing Module screen.

Missing a Week of Marketing

If, for whatever reason, vacation, equipment problems, other priorities or other unforeseen reason; you need to skip a week of marketing, Practice Builder will allow several choices.

If you do nothing and run your normal marketing cycle, the system will print the letters that were required last week AND the letters due to other clients/prospects for this week. The system will not print more than one letter for any client/prospect unless you have a sequence which calls for two or more letters on the same day. This choice will probably double your printing volume for this run of marketing but that is the only change. All client/prospect sequences will be maintained and subsequently run as normal.

You may choose to not increase your volume and print this week only the letters and articles that were due last week. This choice requires that you tell the system to ignore the one week (or more) that just passed without a marketing run. Essentially, you will erase that week from the Practice Builder's calendar. Again, all client/prospect sequences will be maintained and subsequently run as normal, merely a week later. Your printing volume will not increase as above. To implement this choice follow the steps below.

Step 1: In Practice Builder, click on Tools and select Marketing and then select Display Marketing Counts.

Step 2: In the lower left corner Select Sequence gives you the option of choosing any individual sequence or all of the sequences.

Step 3: At the bottom right, **Increment Start** will increase the start date by one week for the sequences selected in Step 2. Click on **Increment Start.**

Step 4: A dialog box opens asking if you are sure. Click on **Yes** and Practice Builder will automatically erase the week you missed.

Step 5: Repeat this process for additional weeks if necessary.

Or:

Step 1: Open **MS Access**.

Step 2: Open the **File** menu ad select **Open** (or **Open Database**).

Step 3: Locate the [driveletter]:\tls\data folder.

Step 4: Double-click the database that needs to be repaired.

Step 5: Follow the MS Access instructions for repairing the database.

Once Access has repaired the database, you should be able to enter Practice Builder without difficulty.

Using Three-Across Labels

To Change from the default 2-across labels to 3-across labels in Practice Builder Financial:

Step 1: Select **File**, then **Close**

Step 2: Then **go to Help, Download Original Labels**

Step 3: Select **Download Three Across Labels**

Step 4: Click on Yes to continue the download. .

You will now have the template installed to use three across labels! If you elect to switch back to two across labels you will need to repeat the process but download the two across template.

Note: Three across template fits 1" x 2 5/8", Avery 5960(white) and Avery 5660(clear).

Moving Program and Data to Another Computer

To transfer a working system to a new machine (standalone to standalone):

-

Step 1: Make sure the old system is fully updated and new activation key is entered if additional modules have been purchased.

Step 2: Install on the new machine and enter the Licensed Owner Name and Activation Key. Make sure the **new** computer system is fully updated and the new activation key has been entered if additional modules have been purchased In Practice Builder Financial you can check or edit this under Tools/Options/Licensing.

Step 3: How to move contents of data, docs, and clntdocs to new machine:

a. If you are on a network, you can copy the folders \docs, \clntdocs and \data to a temporary folder on the Network. The folders are located within the TLS folder.

b. Copy the files listed above from the Network Drive to the TLS folder on the new system. Make sure you highlight TLS and paste them. You will be prompted to overwrite files, select Yes. **If you do not get this prompt, you are not copying them to the correct folder, cancel and make sure you are putting them where they belong**.

c. If your current system is not connected to a network, you may select the option below that best fits your needs. This is done on the **old** system.

Step 4: Perform a backup of your data files and place them on a writeable CD, .or other transportable media.

Step 5: Use zip drive. Copy the directories of C:\tls**data**, **\clntdocs, and \docs** to a zip disk in your disk drive. **This requires that you have a zip drive on both the old PC and the new.** Then on the new machine copy the directories to c:\tls, this will replace the files that were placed on the new machine during the install with the files from the old. **At this point if you DO NOT get a message that the files already exist, do you want to copy, you are not putting them into the correct folder.**

Step 6: **CD-read-write.** Copy the files above from the Old Machine to the CD. Then copy them from the CD to the New Machine.

Step 7: Verify that your system works on the new machine.

Step 8: Use your Windows Add/Remove Programs utility- On the OLD PC, remove Practice Builder Financial and all its components. Use your Windows Explorer and delete \tls on the drive of the old PC.

If you want to transfer a working system to a network (standalone to network)

Step 1: Same as above

Step 2: Install on network drive, make sure that all the updates have been applied and that the system works.

Step 3: Copy contents of \data, \docs, and \clntdocs from local machine to network \tls directory. Verify that the information on the network is correct.

Step 4: Setup user accounts on network.

Step 5: Run Component setup on all of the other workstations that will run the system. Create an icon from the network and paste it to the desktop of the workstation.

Step 6: Uninstall PRACTICE BUILDER FINANCIAL from the workstation that the data files were copied from

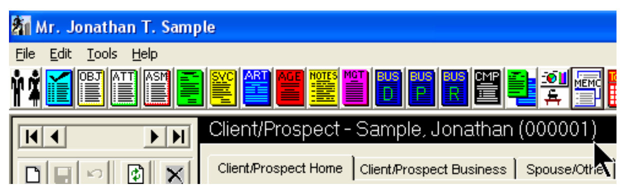
Step 7: Install components on that workstation.

Adding Scanned Documents to Client Records

For a variety of reasons you may want to store related documents pertaining to clients/prospects within Practice Builder. Not only does this keep all documents neatly together, it also allows for easy retrieval. Some advisors use this capability for statements and other financial reports they receive for their clients. These are scanned and then the digital image is saved within Practice Builder.

To use this function you must first have a digital file. Using the scanning software you have available, scan the documents for a client and save the file in a folder that you can identify as belonging to that client.

Step 1: In Practice Builder, Select the Client whose record you want to add scanned documents into. For Example Jonathan Sample's, client record is 000001. Look at the top of the screen directly under the row of icons.



Step 2: When you are ready to copy the scanned documents into the Practice Builder client record, double click My Computer and go to the drive where Practice Builder Financial is installed (the TLS\ClntDocs folder),

Step 3: Locate the Client Record Number then copy or paste the new file from its original folder into this TLS\clntdocs\ (client record number) folder.

Suggestion: Create a new folder inside the ClntDocs folder for each client that you have scanned items. Place all the scanned items within that folder.

Act and Goldmine Exports

There are two automated ways to import data into Practice Builder. The first, which is included with Practice Builder, is from a comma separated value (CSV) file. The second method, which is available only with an optional, additional module, is through a Microsoft Outlook synchronization.

The use of a CSV file requires that you have previously exported from the source application into a CSV file. Given that the best support for any program is directly from its vender, our support team will refer you to the support department of the program you are exporting from.

If there is not a one to one match for an element of data from your source application, you may consider importing it into a Key Code within Practice Builder. This requires pre planning on your part as to what fields would be candidates for Key Codes within Practice Builder.

Once exported, our Support Team can assist you in importing the following information (if available from your exported file) See Page 2.

ACT can export directly into a text delimited file. Since you have the ability to customize some fields in ACT, you will have to choose which fields contain information that you wish to see in Practice Builder.

Fields to look for that may require editing on your part are:

- Names
- Addresses
- Customized fields in the export file that should be Key Code Entries in Practice Builder.
- Client and Spousal information entered as Mr. and Mrs. John Q. Sample will have to be edited and separated into separate columns.
- Notes may have to be copied and pasted from one program to the other depending upon whether you are able to export into your file...

The Goldmine export file is basically the same, editing will be required on your part, and fields you have defined in Goldmine will have to be looked at individually and the UserDefined fields interpreted and Key Codes set up in Practice Builder for those items.

- Names
- Addresses

- UserDefined fields in the export file that should be Key Code Entries in Practice Builder.
- Client and Spousal information entered as Mr. and Mrs. John Q. Sample will have to be edited and separated into separate columns.
- Notes may have to be copied and pasted from one program to the other depending upon whether you are able to export into your file…