

INTERFACES AVAILABLE

- DST FANMail
- DAZL / Advisors Central
- Pershing
- Vision 20-20
- Fidelity / NFS
- Wedbush Morgan
- TD Waterhouse
- LPL
- Sterne, Agee & Leach
- SEI
- First Clearing
- Rydex Funds
- CANNEX
- Zurich Kemper / OneLife
- Albridge / StatementOne
- MassMutual (XMLife)
- Charles Schwab
- DATAlynx / First Trust
- Union Central
- Jefferson Pilot
- Metlife
- Skype

Version 2.8 Interim Update Released

We've placed a new update on our web site which contains 2 new features of importance. We've also incremented the Version number to 2.80.00.

This update has two major new features. One of the features will only apply to some users, while the other will apply to all users.

Skype Dialing

Skype is a Voice Over Internet Protocol (VOIP) phone system owned by Ebay. It's specifically set up to work from your computer.

Advisors Assistant now has an interface for Skype which will allow you to dial any phone in the world right from your computer.

To learn more about Skype, read the next article.

Strong Passwords

Security has become a major issue. Because we have several banks using Advisors Assistant, we've added an option in Version 2.8 to use strong passwords.

A strong password must be at least 8 characters, have one upper-case letter and one lower-case letter and one number. It must be set to expire in a number of days and the same password can't be repeated until 10 new ones are used. Only the user knows the password and it is not even seen by the administrator. Once a user changes their password, they can't change it again for 10 days.

Search for "strong" in the help for complete information on setting up strong passwords. Once they are set up, you should not go back to standard passwords. ■

How To Make Free Long Distance Calls

An exciting new feature in Advisors Assistant is the ability to make phone calls over the Internet with the Skype VOIP service. Advisors Assistant has always had the ability to dial the phone using the Windows dialer, but you needed a modem or a digital converter to allow your computer to connect to the phone line.

Now with Advisors Assistant 2.8 and Skype you can use your computer to dial any phone number within the USA or Canada free for the remainder of 2006! (Read about this on the Skype web site.)



Getting Set Up On Skype

To get set up on Skype:

1. Go to www.skype.com and download and install their software.
2. Update Advisors Assistant from our web site and be sure to install the new station routine on each station on your network (besides updating the main program.)
3. Set up a Skype Group for your company so you can all use the same account. You can read about this on their web site.
4. Set Skype to load when you boot your



Some Suggestions On New Computer Equipment

With Advisors Assistant 2006 in beta for Contact Management and Insurance, we've been getting lots of calls from users who are purchasing new equipment. They want to be sure they can run the new system.

Advisors Assistant 2006 has two components, the computer which stores the data and runs the database engine (SQL Server), and the computer(s) that run the program. In a single user system both components run

on the same computer. On a network, SQL Server or SQL Express (the free SQL Server) will run on the computer acting as a server.

The "server" should have 512 MB or more of memory. Microsoft recommends 1 GB for running the SQL Server database engine, but it will run with 512 MB if you're not running lots of other programs. A new server should be configured with at least 2 GB of memory so you will be prepared for the future.

The stations on the network should have 512 MB or more of memory. Adding memory will always increase computer speed.

Dual Processor Chips

If you're purchasing new computers, be sure to get a minimum of 1 GB of RAM memory. After memory, the new dual processor chips are the next best investment. Processor speed is more significant on servers than on stations, and never buy the fastest processor available for business applications.

Microsoft's new Vista Windows update will probably require a minimum of a gigabyte of memory, so start at that level when purchasing a new machine.

Free Long Distance (From First Page)

computer. That's the default when you install.

5. Set up Skype Out, with a deposit of \$10 so you can start an account. They will only use the \$10 if you make an international call from the US or Canada.
6. You'll need to get a "headset." That's a set of headphones that has a boom microphone attached. The microphone plugs into your computer. If you're using a phone headset already, such as Plantronics, there are special amplifiers from Plantronics that let you switch back and forth from the phone to the computer. Labtec also makes a switch, in the \$20 range, that lets you use the same headset for your phone system and your computer. A standard headset can be purchased on the web for less than \$15.

So, for about \$25 you can get set up to have free long distance for the rest of 2006 if you live in the US or Canada. Using Skype from other countries will run about 2 cents per minute.

Free Support Calls For International Users of Advisors Assistant

Our international users can call our 800 numbers in the US using Skype at no charge. Calling US 800 numbers from anywhere in the world using Skype is free.

Dialing With Skype

Now you've installed Skype, updated Advisors Assistant, installed the Version 2.8 Station on your workstations, and you've given Skype \$10 to establish the Skype Out account. Your headphones are on your head and you're ready to dial. How's that work?

1. Click on the phone icon on the view screen.
2. Select the phone number from the list of phone numbers.
3. Click on the Dial Skype button.

Skype Phone Number Requirements

Skype needs the country code and the area code to dial a number. Most of us leave our home country code blank, so, if it's blank Advisors Assistant will read your home country code from your computer's registry.

You will need to be sure the area codes are filled in for your phone numbers before Skype will dial them. Filling in the area code in the phone number is probably worth saving a dollar or so on a long distance call.

Skype Quality

For US calls, we've mostly found Skype to be good quality. Of course, if your Internet connection begins to fail, you'll have problems. For international calls, Skype exceeds normal phone call quality!■

You may save enough money on your long distance phone bill to pay for your annual Advisors Assistant updates.

New Computer Equipment (From Page 2)

Buying For The Future

The useful life of a computer seems to be from 3 to 4 years. There are two major causes of obsolescence.

1. Processor obsolescence: Pentium II's are just too slow and haven't been able to run newer programs for the last 2 years. Pentium III's will still run most of today's programs, but processor speed makes them run slowly.
2. Memory capacity: Many Pentium III computers won't accommodate more than 512 to 1GB of memory. They probably won't run Microsoft's new Vista Windows system.

New Computer Memory

Don't fill up all the memory slots when you buy a new computer. If the box contains 2 slots, don't buy two 512 MB chips. Spend the extra \$20 and purchase a 1 gigabyte chip. That way, you won't be throwing away 2 good chips just to expand your memory to 2 GB.

New Computer Processors

While we said not to buy the fastest processor, don't buy the slowest either.

Look for that "sweet spot." Below the sweet spot, you don't save much by choosing a slower processor. Above the sweet spot, you pay a lot more for just a small gain in processor speed.

Hard Drives

If you're on a network, you don't need to store all that much on your work station. Normally a 60 to 80 GB drive is offered and should be fine.

The amount of network storage you have depends on the size of your business. Small businesses should look for that sweet spot where just a few dollars adds significantly to storage.

Backup Tapes

Backup tapes for your server are a must. They can backup overnight and they are very easy to take off site. Be sure to get a unit large enough to backup all of your hard drive(s) on one tape so you don't have to change tapes. ■

Look for a computer that will accommodate at least 4 GB memory so you'll have room for expansion. This will extend your service life.

Off Site Backups?



We have this user's permission to share this picture of his office. Mirrored drives didn't help much because both drives burned up in the fire. The picture is the newsletter article.

Is your critical data part of an off-site backup strategy. Do you take your Advisors Assistant backup home on a zip drive, tape, or a USB 2 memory stick? How about your accounting?



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The Leader In Client Management Since 1985

Client Marketing Systems, Inc. has provided office automation software to the financial services community since 1985.

Advisors Assistant® tracks contacts, clients, calendar items, investments, and insurance. Since our first day of business, Client Marketing Systems, Inc. has provided toll free technical support to our users who stay updated.

With thousands of users worldwide, premier support, and a twenty-one year record of service to the financial community, Client Marketing Systems, Inc. is the clear choice for financial professionals.

How To Join Our User's Group

ClimarkCommunity.com is a web site forum specifically for Advisors Assistant users to provide information to each other and Client Marketing Systems.

To register please follow these steps:

1. Go to www.ClimarkCommunity.com.
2. Click on Register under the logo.
3. Fill in your User Name.
4. Fill in your email address and password. This information is not exposed to other members.
5. Be sure to leave the box about receiving email from forum administrators checked, (located under the Submit Button in the Additional Options section,) or you won't receive special announcements. If you don't want to receive any email from other members, uncheck the second privacy box. (When a member sends you an email, they still don't see your address. The forum actually sends you the email!)
6. Confirm the verification code. This is designed to keep automated web robots from registering.
7. Click on the Submit Registration button. You'll receive a verification email. **BE SURE to click on the link in that email to verify your email address.** Other-

wise, you won't be given access to the forum.

Your Profile Is Important. Don't Leave It Blank!

After you register, you'll receive an email from admin@climarkcommunity.com. It's a good idea to put climarkcommunity.com on your list of acceptable email addresses if you have a spam filter.

After replying to the verification email:

1. Log back into the forum and **fill out your profile**.
2. Click on **Control Panel** on the second line on the right side of the screen.
3. In the "Your Profile" section on the left side, click on **Personal Details**. We need to know if the person registering is the registered Advisors Assistant user or a member of the staff.
4. **In the Biography Section, put the real name of the Registered User for your system (such as John Smith.)**

Once we identify you as a user, we'll upgrade your forum status from Forum Member to Advisors Assistant User, and you'll have access to several new interesting areas of the Community. ■

ClimarkCommunity

Members receive pre-announcements through blast emails.

They knew about Skype weeks before release of Version

2.8.