

DIY Adviser Client File – Rename

Did you know that your client file names can be easily changed on Adviser desktop, without hitting the big red CALL BPC panic button? This is the name that will appear on your end of season reports, planning reports and recommendations so we thought this might be a good time to deliver a nifty How To.

Right clicking and renaming will end badly (GUID conflicts, duplication, EOF/BOF errors) and feedback suggests this is not as fun as it sounds. Please find instructions below to nail it first time, every time:

1. Sync your file on App if required
2. Sync your file on Adviser desktop
3. Open file on Adviser desktop
4. Click **File**
5. Click **Save & Send**
6. Click **Save As...**
7. Click **Yes**
8. Change file location if required
9. Enter new name (make sure you leave the .adv at the end)
10. Click **Save**
11. Click **Yes**

You then have a brand new file open, drama free. Now it's time to swap the active files.

12. Click **Close**
13. Click **Refresh File List**
14. Scroll down to the bottom, your new file will be Local Only
15. Single click your new file to highlight
16. Click **Tools > Reset Sync Clock > Yes**
17. Click **Sync Selected Files with CornerPost**
18. Click **OK** on Manual Sync Complete prompt, wait 5 minutes
19. Click **Refresh File List**
20. On status "Ready" and "Changes on Local Only", single click file to highlight
21. Click **Sync Selected Files with CornerPost**

You can now sync this to your App through the CornerPost tab on the App home screen. Continue to deactivate the old file on CornerPost:

22. Click **Refresh File List**
23. Single click old file to highlight
24. Click **Delete Selected File from CornerPost**
25. Click **Yes** on prompt to confirm delete
26. Click **OK** on prompt

Once this file is deactivated, it can be deleted from the App if desired. To complete this:

27. Touch **Adviser Mobile** from home screen
28. Touch **Edit**
29. Touch red negative beside old file name
30. Touch **Delete**
31. Touch **OK** on prompt
32. Touch **Done**

You have now changed the name of your file while retaining all data, deleted the old file from CornerPost and the App and sync'd your new file to CornerPost. You're ready to go!