



## QSalesData Workstation Update Instructions

Updates to our QSalesData program will be released on a regular basis. You will receive email notifications letting you know that the new version of the program is available for download and install.

*You can check your existing version by going to Tools > QSalesData Import. Your version number will be displayed at the top of the window.*

This document provides instructions on how to update the various components of your QSalesData implementation.

### **STEP ONE: Update the QSalesData software on your server or main computer that has QSalesData installed and run BUILD FIELDS once for your ACT database.**

1. Close out of ACT if you have it open. Go to [www.QSalesData.com/install](http://www.QSalesData.com/install) and click on the QSalesData link near the bottom of the page to download the new build. **Choose the appropriate build for your specific version of ACT!**
2. Click on RUN when prompted.
3. Click NEXT to continue thru the install
4. When prompted to install the Data Connector Library, say NO because you are performing an upgrade and the library files are already there.
5. Click NEXT and FINISH when prompted to complete the install.
6. Open up ACT and go to Tools > QSalesData Import
7. Click on the BUILD FIELDS button and say YES to continue
8. Check the Contact Fields and Custom Table checkboxes. (If you use Company Records in ACT, then check the Company Fields checkbox as well, but that is optional)
9. Type in the login information for an ACT administrator use in the login section
10. Click on the BUILD FIELDS button and any new fields included with the update will be built.
11. Close out of ACT and go back in before adding any new fields to the ACT layout.

**(Note: You only need to run the Build Fields piece once, you don't have to run it for every workstation.** If the release notes specify that new fields are available, you may need to go into Tools > Design Layouts in ACT to make them appear on your ACT screen)

### **STEP TWO: If you have additional workstations that have QSalesData installed, run through the update process on each of those machines as well.**

1. Close out of ACT if you have it open. Go to [www.QSalesData.com/install](http://www.QSalesData.com/install) and click on the QSalesData link near the bottom of the page to download the new build. **Choose the appropriate build for your specific version of ACT!**
2. Click on RUN when prompted.
3. Click NEXT to continue thru the install
4. When prompted to install the Data Connector Library, say NO because you are performing an upgrade and the library files are already there.
5. Click NEXT and FINISH when prompted to complete the install.

Note: If you have several workstations that need to be updated, you can download and save the QSalesData install file to your network and simply run that file from each machine rather than having to repeat the download on each machine.