QBSalesData Multi-User Installation Checklist

Online videos exist for many of these steps, go to: www.qbsalesdata.com/onlinevideos

1. **Download and install the QBSalesdata Software on your Server or main Computer. Should be the one that hosts your ACT database or Quickbooks database**
   a. Note, you will need to be able to open up both the ACT and Quickbooks client software on the machine you are working on. In some cases that means you will need to install the Quickbooks client software on your server, if your IT department only installed the database manager piece of Quickbooks.
   b. Close out of ACT! and Quickbooks. Go to www.qbsalesdata.com/install , locate the appropriate download link for your version of ACT!, and download and install the software. Answer YES when prompted to install the Data Connector Library. Move on to Step 2.
2. **Run the Build Fields program to build your QBSalesData fields in your ACT! database**
   a. Open ACT and go to View > Contacts on the top menu to make sure you are in the Contact Detail view.
   b. Then go to Tools > QBSalesData Import and click on the BUILD FIELDS button
   c. At a minimum, you need to build the Contact and Custom Table fields for your product to work properly
   d. (Optional) If you intend to use Company Records in ACT you can build the Company Fields, but not required. If you are running ACT! 2010, you will have an option to build Opportunity Fields.
3. **Add the QB Data tab to your ACT! Layout - ONLINE VIDEO AVAILABLE**
   a. This utility will take the layout file you select and save a copy of it with a _QB at the end, it will then add a QB Data tab and fields to your layout.
   b. Go to Tools > QBSalesData Tab Install, then choose "current layout" or pick a different layout.
   c. You should see the layout refresh to the _QB version and it should now instruct you to go to Tools > Design Layouts > Contacts. If it doesn't refresh, close out of ACT and go back in and switch to the new layout with the _QB at the end.
   d. Go into the Layout Designer as instructed, click on the QB Data tab once you are in the layout editor, and click anywhere in the tab area to add the fields to the layout.
   e. It will let you know when it is completed. At this point simply close and say "yes" to save the layout.
4. **Set Your Field Mapping**
   a. In ACT, go to Tools > QBSalesData Import and click on the SET MAPPING button
   b. Click on the RESET TO DEFAULTS button to set to the default mapping
   c. Do not change the mapping for Quickbooks Bill to Address 1 & 2
   d. Verify the mapping for the other fields Quickbooks fields to make sure they are pointing to the appropriate fields in ACT. When done, click on CLOSE, and close and reopen ACT to save changes.
5. **Run the QB Link Wizard to link records between ACT and Quickbooks – ONLINE VIDEOS AVAILABLE**
   a. Make sure both ACT and Quickbooks are open. *Note: If you have a large ACT database, you only want to attempt to link a max of 5,000 contacts at a time. Perform a lookup in ACT to limit the size.*
   b. In ACT, go to Tools > QB Link Wizard
   c. In most cases, you will link records using the Contact Linking tab. Select your field matching criteria, and click on the LOAD DATA button to come up with a list of matching records.
   d. After a few seconds Quickbooks will flash and prompt you with a Certificate message. Choose the YES, ALWAYS option and select a user to login as if an option.
   e. Go back to ACT and verify the matching records, and then click on the PROCESS button to link the designated records. Linked records will display a number in the QB_InternalID field.
   f. You can use the CREATE FROM QB tab to add any records that exist in Quickbooks, but not in ACT.
6. **Run a manual Transaction Sync to import QB Sales Data into ACT – ONLINE VIDEOS AVAILABLE**
   a. Make sure both ACT and Quickbooks are open
   b. Go to Tools > QBSalesData Import in ACT
   c. Select All Invoices and click on the TRANSACTION SYNC button to pull in transactions from Quickbooks. It will pull in data for all of your ACT contacts linked to Quickbooks. Note, this process may take a while if you have a lot of customers in Quickbooks linked to ACT.
   d. Your Quickbooks transactions will appear in the QB Transactions Tab in ACT, and all of the fields on your QB Data tab will be updated. Note, you can update a single record in ACT by clicking on the REFRESH DATA FROM QB button.
7. **Go to each workstation that you purchased a QBSalesData license for, and install the program using the link in Step 1. Once installed the QB Transaction and QB Item tabs will show up in ACT.**

Congratulations! Your initial QBSalesData system setup is complete. Refer to the Quickstart Guide and the online videos on our website to learn about all of the features of our product.

www.qbsalesdata.com/onlinevideos