QSalesData Multi-User Installation Checklist – v3.x

1. **Download and install the QSalesData Software on your Server or main Computer. It 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 before starting the install. During the installation, answer YES when prompted to install the Data Connector Library.
2. **Run the Build Fields program to build your QSalesData 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. Go to Tools > QSalesData 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 or higher, you will have an option to build Opportunity Fields.
3. **Add the QB Data tab to your ACT! Layout**
    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 > QSalesData 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 > QSalesData 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**
    a. Make sure both ACT and Quickbooks are open, and you are logged into Quickbooks as the "Admin" user so that the initial certificate can get created.
    b. **Creation of the QB Certificate:** The first time QSalesData attempts to access your Quickbooks company file, the QB program will flash and prompt you with a Certificate message. Choose the YES, ALWAYS option and if you have the option to pick a user, pick the admin user. This may happen in the middle of the Linking or Create from QB process. After the certificate is created, go back to ACT and continue the process.
    c. In ACT, go to Tools > QB Customer Link Wizard
    d. **If you have an existing ACT database**: you will most likely 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**.** *Note: If you have a large ACT database, only attempt to link a max of 2,000 contacts at a time. Perform an ACT lookup to limit the size.* Verify the matching records, and then click on the PROCESS button to link the designated records. Records that are linked will display a number in the QB_InternalID field on your QB Data tab in ACT.
    e. **If you are starting out with a new blank ACT database:** you can skip the Contact Linking tab and go to the Create from QB tab and hit LOAD DATA and then CREATE to pull all of your QB Customers into ACT.

6. **Run a manual Transaction Sync to import QB Sales Data into ACT**
    a. Make sure both ACT and Quickbooks are open. In ACT, go to Tools > QSalesData Import
    b. 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, so you may want to run it at the end of the day.
    c. When complete, 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. You can update individual records in ACT by clicking on the REFRESH DATA FROM QB button on the QSalesData toolbar.
7. **Go to each workstation that you purchased a QSalesData 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. You will also need to switch the ACT Layout on each workstation to the one that ends in _QB so that all of the other ACT users will be able to see the QB Data tab in ACT.**

Congratulations! Your initial QSalesData system setup is complete. Refer to the User Guide to learn about all of the features of our product.

AUTOMATIC NIGHTLY TRANSACTION SYNC: Once you get everything with QSalesData setup and running, you will most likely want to install and configure our TransactionSync program on your server/main computer. This allows you to schedule a nightly transaction Sync to happen automatically on your server. That way your Quickbooks data in ACT is refreshed every night. Go to the Online Videos section of the QSalesData website to watch the video **"Setting up the Nightly Transaction Sync Program"**