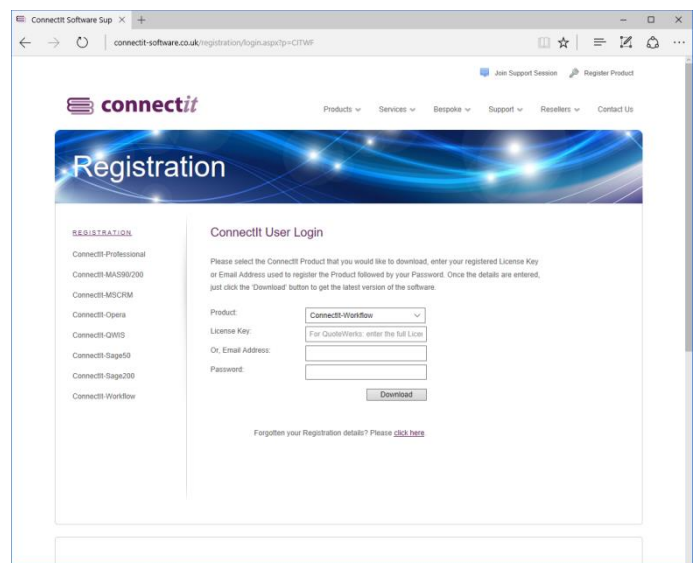


Step-by-Step Guide to Upgrading

Upgrading ConnectIt-Workflow

1. In an internet browser, go to <http://www.connectit-software.co.uk/registration/index.aspx?p=CITWF>
2. Enter your **QuoteWerks** license key (or the email address used to register initially) and your password.
3. Click download.

Note: If you don't know the password, then you can use the "click here" option to be emailed your registration details.

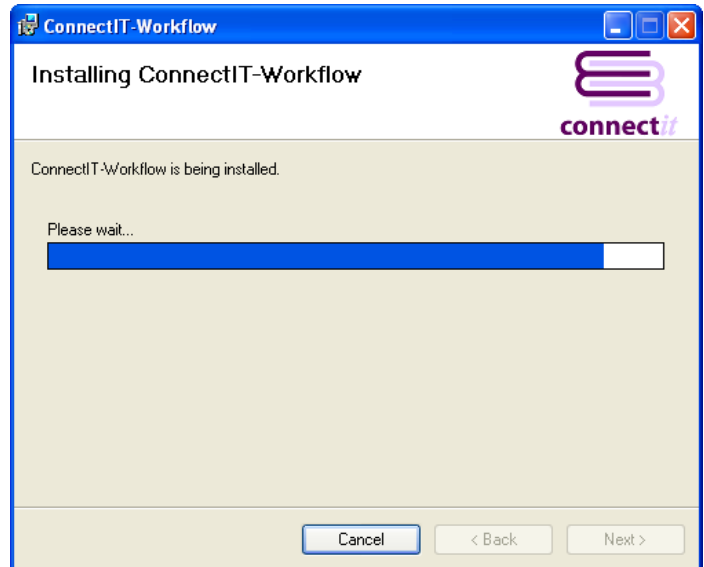


4. The **ConnectIt Install** download will start; save the file to your hard drive or a convenient place on your network.



5. Once the download is complete, extract the files and run the **setup.exe**.

For more information on installing ConnectIT-Workflow, please refer to the Step-by-Step Guide to Installation.



6. On successful upgrade, users may receive a message that a valid license could not be found. If this message appears, then open the **ConnectIT Registration** utility and click the **Get License Info** button to get the most up to date registration information for your purchase.
7. If new utilities are available in your new version of **ConnectIT-Workflow**, then open the **ConnectIT Registration** utility, select the required additional module from the **Module** drop down list box and then click the **Create Menu** button. Any new menu options will be available the next time you start **QuoteWerks**.
8. If additional user licenses or **ConnectIT-Workflow** modules have been purchased, click the **Get License Info** button to update your **Connect-Workflow** registration.



Note: These steps only need to be performed once for each QuoteWerks installation on your server and/or remote users.



9. If you are using the **ConnectIt-Workflow Validation** module, you will now need to open the **ConnectIt-Workflow Configuration** utility and click the **Update Rules** button on the Validation | ConnectIt tab. This will ensure that your existing Validation rules are updated into the new version of ConnectIt-Workflow.
10. If you are using the **ConnectIt-Workflow Document Split** and/or **Request for Quotation** modules, you will now need to open the **ConnectIt-Workflow Configuration** utility and then click **Save** from any of the **ConnectIt-Workflow Configuration** utility tabs. This will update your new version of ConnectIt-Workflow with any new features and configuration options.

Note: These final steps will need to be performed for each ConnectIt-Workflow user.

