

Step-by-Step Guide to Upgrading

Upgrading ConnectIt-Workflow

- 1. In an internet browser, go to <u>http://www.connectit-</u> <u>software.co.uk/registration/index.aspx?p=</u> <u>CITWF</u>
- 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 **Connectlt 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 Connectlt-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 **Connectlt 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 Connectlt-Workflow, then open the Connectlt 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 Connectlt-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.

😑 ConnectIT Registration utility 🛛 📃 🗖 🔀					
Register ConnectIT					
Registration	Seed	A-0000-0000000-AAAAAA	Copy to Clipboard		
Module		v			
Step 1: Connect to the internet and go to the ConnectIT Registration page <u>here</u> .					
Step 2: Complete the	Step 2: Complete the details on the online Registration form.				
Step 3: You will be emailed confirming that the registration process has been completed successfully. If you experience any problems then please email <u>support@connectit-online.co.uk</u> .					
Step 4: We will validate the registration information and send you email notification that your details have been activated on the ConnectIT License Server (usually within 1 working day).					
Step 5: Connect to the internet, select the Module you wish to register from the Module drop down list and then click the Create Menu button below; the appropriate menu items will be added to the Tools menu in QuoteWerks.					
		Reset Get License	e Info Create Menu Close		



- 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.
- 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 Connectlt-Workflow user.

ConnectIT Configuration utility	_ 🗆 🗙			
General Validation RFQ Document Split Document Open				
ConnectIT Rules Advanced				
ConnectIT Settings				
Rules XML File C:\Program Files\Hilltops IT\ConnectIT.Workflow\validation.xml				
Lest Connection				
If you are updating from a previous installation of ConnectIT-Workflow, please click the button below to update your existing rules for the new version.				
Update Rules				
Save				

