

## B.E.A.T. for Mortgage 2009 Installation Instructions

New Features:

- Multiple Loan tracking
- Automatically calculate and track Net Commission
- Automatically calculate and track Total Points

Go to [www.crmcomputers.com](http://www.crmcomputers.com) to download a 30-day trial of BEAT for Mortgage 2009.

Once file is downloaded double click on the Setup\_BEAT2009.exe file. You will be prompt for a password. The password is **CRMConnection**, enter the password and click on *ok*.

Two files will be extracted to the location C:\BEAT\Installation Files, Setup.exe and Setup\_BEAT2009.msi. Next, click on *My Computer* on you computer desktop, browse to C:\BEAT\Installation Files, and then double click on the Setup.exe file. You will be prompted with the B.E.A.T. for Mortgage 2009 Welcome Screen.

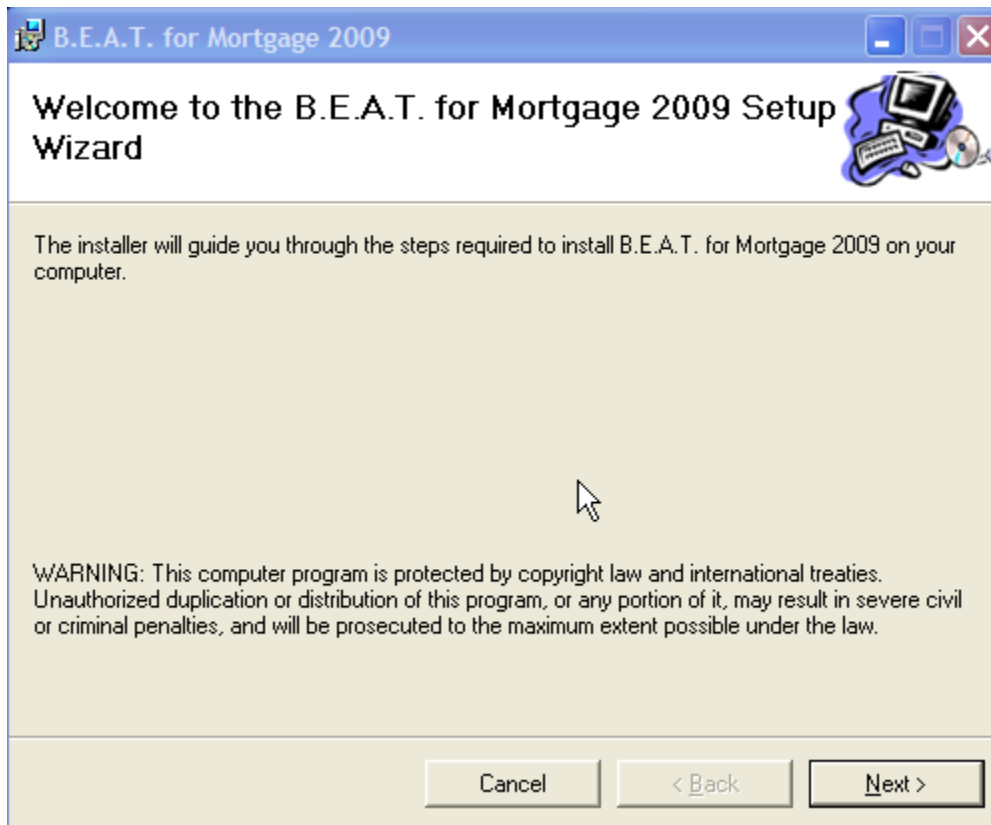


Figure 1

Click *Next*.

The next screen will be the License Agreement Screen. To agree to the User-License Agreement select *I agree*. Click *Next*.

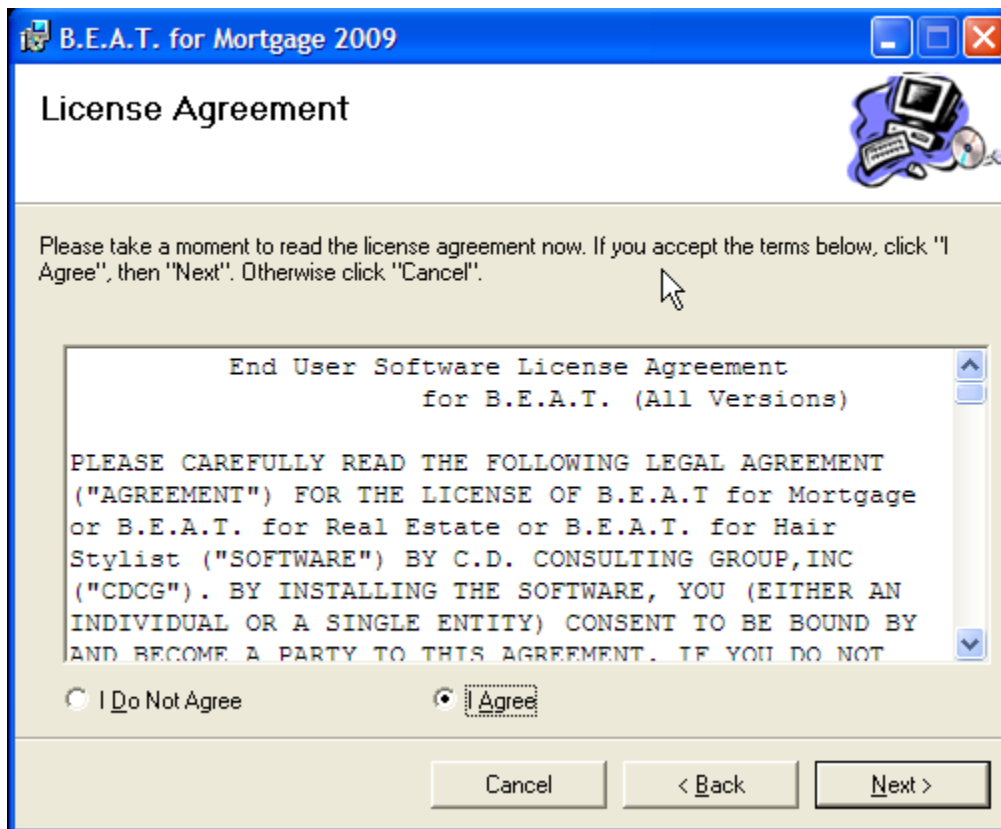


Figure 2

Next you will be prompted with the Select Installation Folder screen. You will notice a default location already selected; please **don't change because BEAT functionality is dependent upon the default location.**

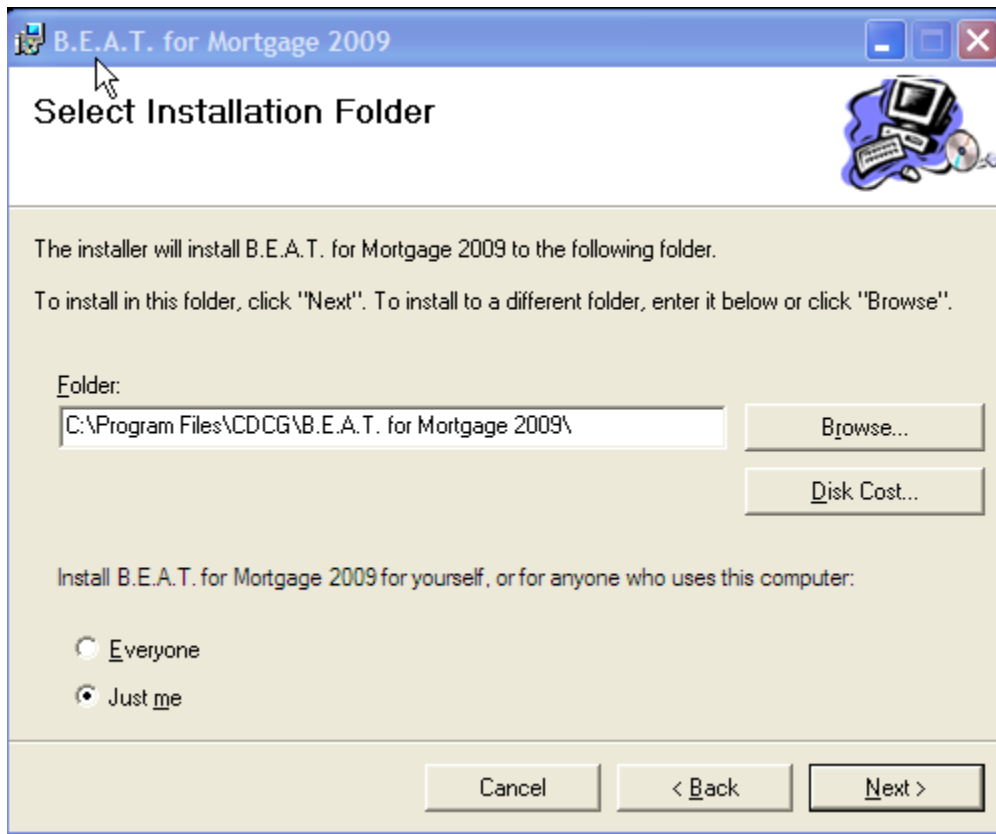


Figure 3

Next, you will be prompted with the Confirm Installation Screen, click *Next* to continue.

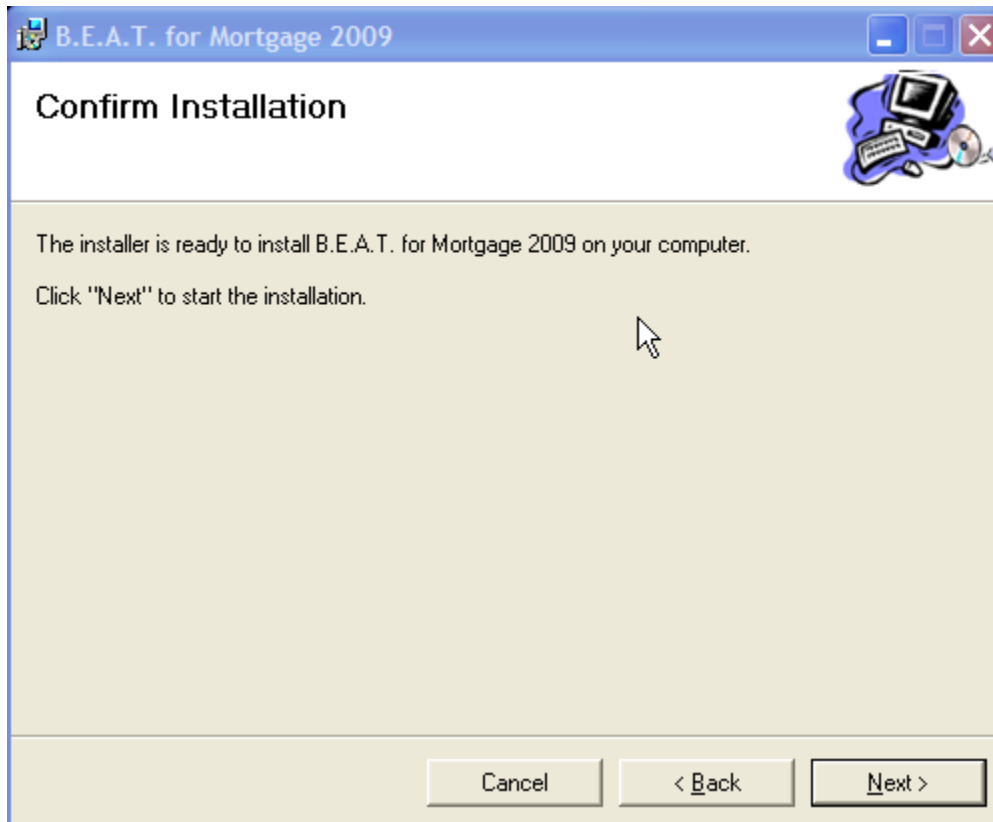


Figure 4

BEAT should be installing at this point.

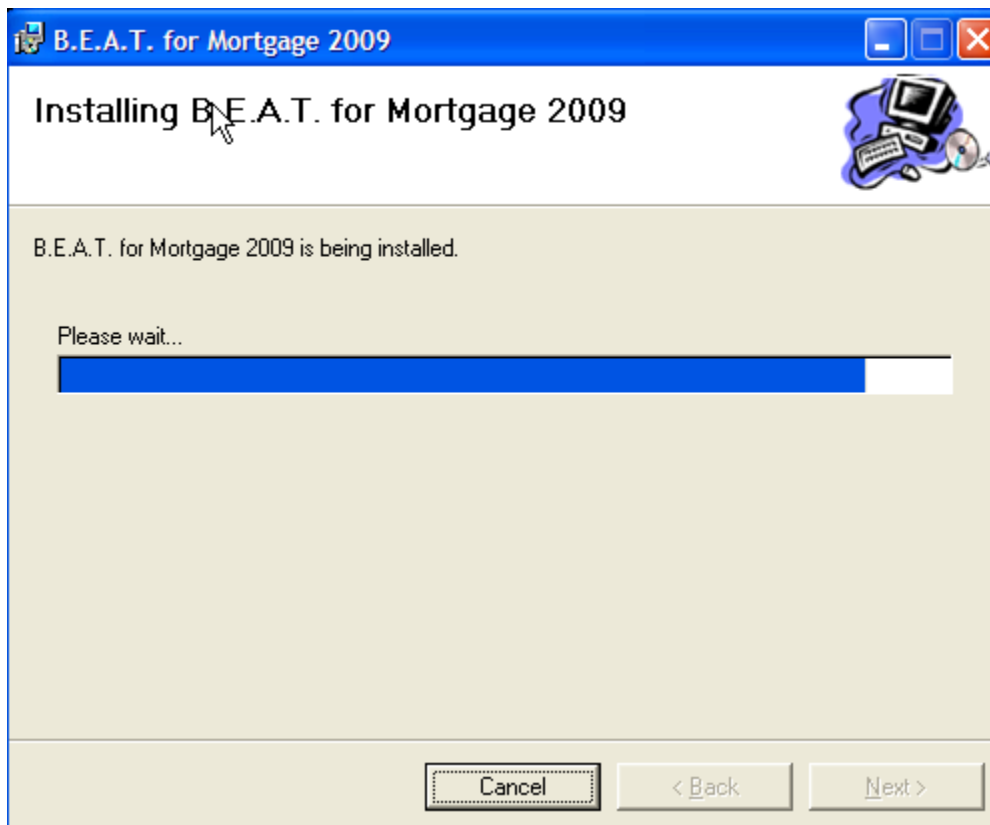


Figure 5

Installation Completed. Click Close.

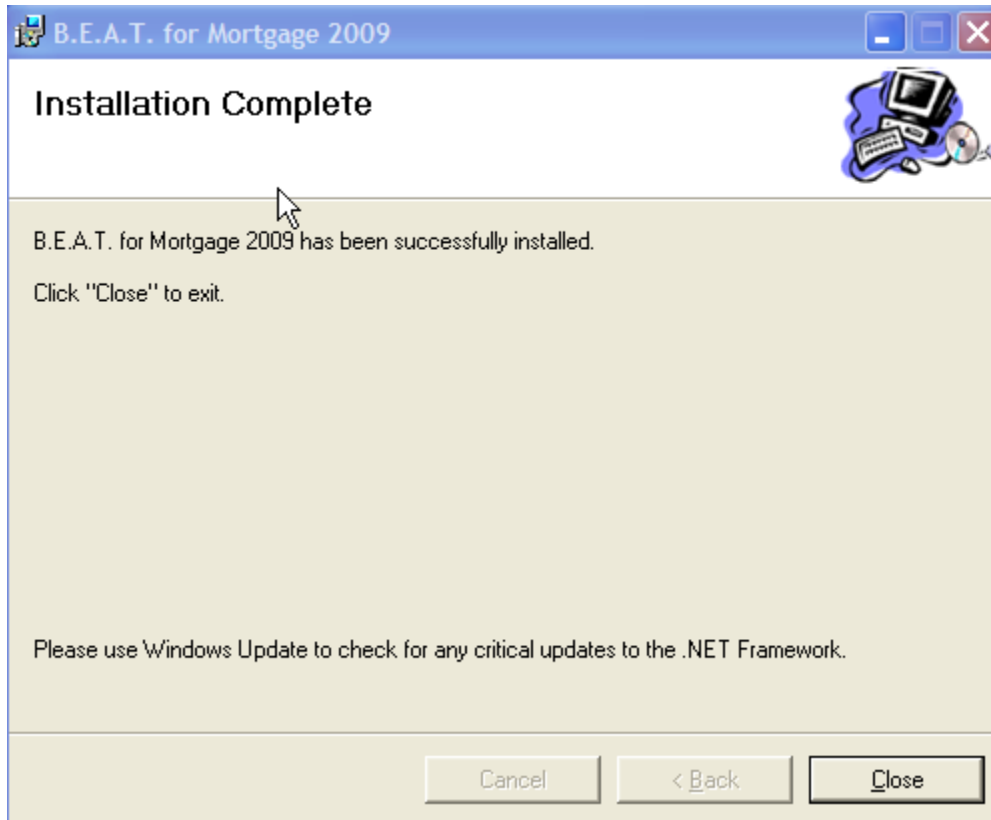


Figure 6

Open ACT to a blank screen.

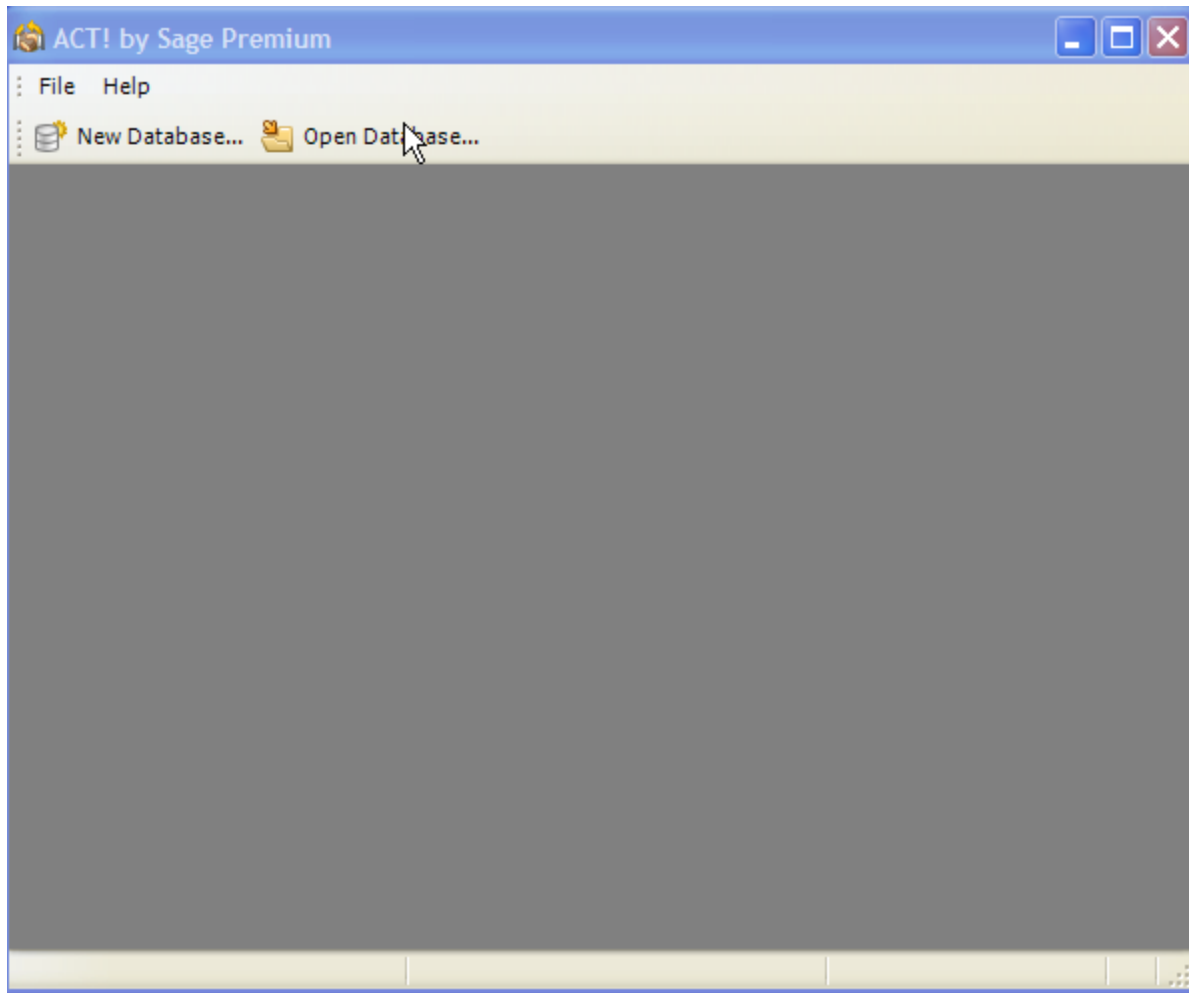


Figure 7

Next File-→Restore-→Database, then you will be prompted with the **Restore Database** screen, select *Restore As*. Click ok.

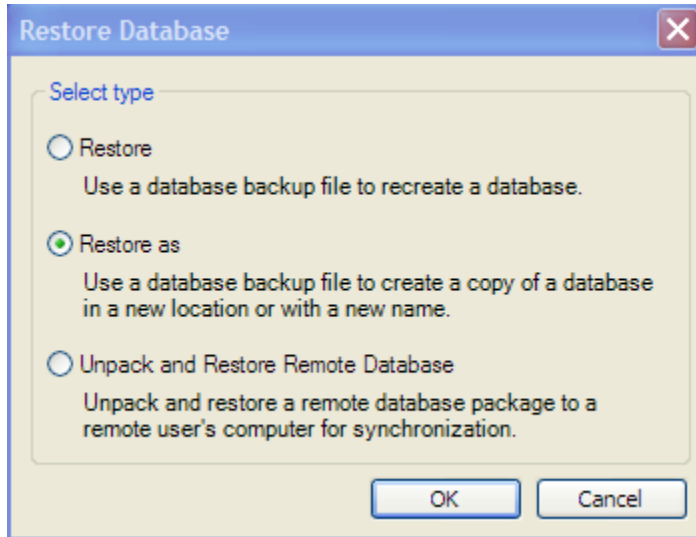


Figure 8

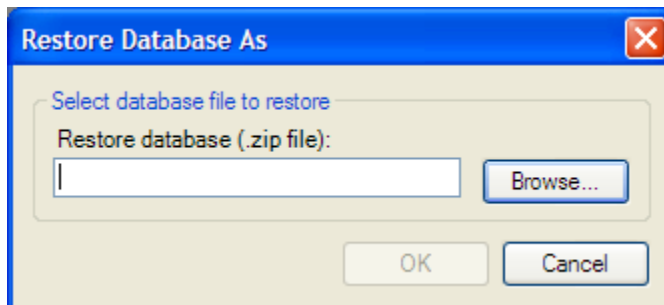


Figure 9

Next click on Browse...and then click on **My Computer**. Click on the local disk (C), browse to \program files\CDCG\B.E.A.T. for Mortgage 2009\. Select the file Skeleton\_1102199.zip for ACT! 2009 Premium (version 11.0.367.0 or higher) or SkeletonStan.zip for ACT! 2009 Standard (version 11.0.367.0 or higher), then click on Open.

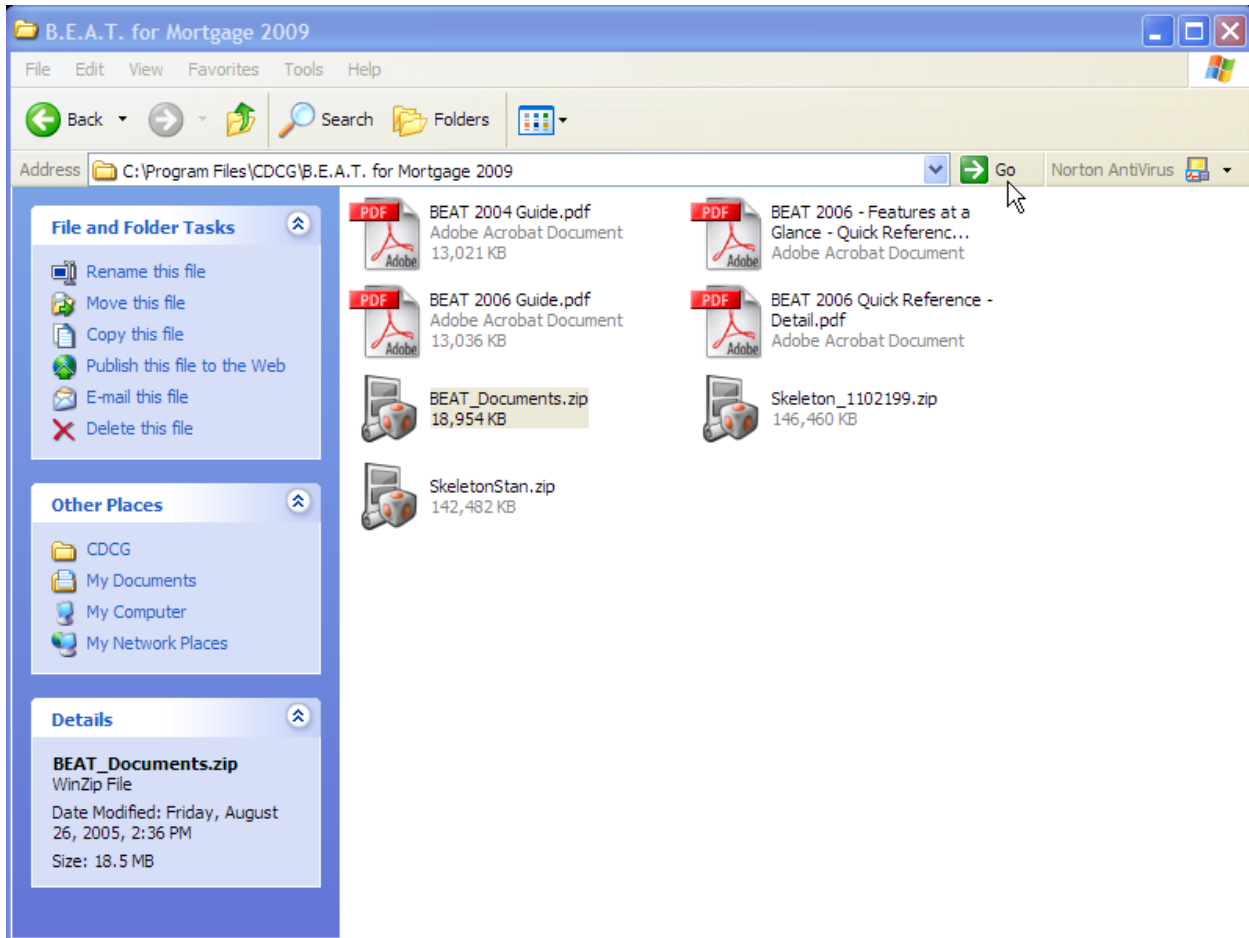


Figure 10

You should be back to the *Restore Database As* Screen, then click OK.

Now you should be at the below screen.

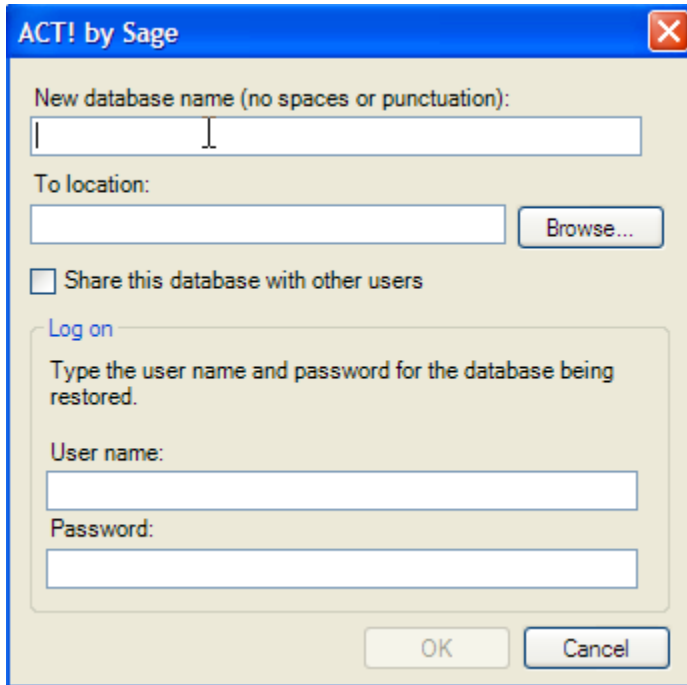


Figure 11

Enter the following information in Fields or Boxes:

**New database name:** BEAT

**To Location:** C:\BEAT

**User name:** Anthony Polk

**Password:** <no password>

Once information is entered click OK. **Note:** If prompted to create a new directory, select yes.