

SalesCTRL Installation Instructions

February 2011

Hardware/Software Minimum Requirements

Hardware	Workstation: 2.4GHz or faster with 512MB RAM, 2GB available disk space Note: Virtual Memory must be System Managed or Custom (1024MB minimum)
Operating System	Workstation: Windows XP Professional, Vista, Windows 7 Server: Windows Server 2003, 2008R2, Small Business Server 2003/2008 Terminal Server / Remote Desktop Services 2003/2008, Citrix (see Terminal Server install document)
Microsoft Office®	Install on the workstation or Terminal Server prior to the installation of SalesCTRL (Outlook®, Word®, Excel® 2003 or later).

Installation Notes

Terminal Server Citrix®	Install on the server through Add / Remove Programs or Install Application on the Terminal Server (Windows Server 2008R2).
Network Drive Mapping	UNC drive mapping and mapping directly to the network SalesCTRL folder is not supported. We recommend mapping to the network drive i.e. T:\ or T:\apps.
PDF Printer – SCDPF	The workstation and server software installs a PDF printer called SCPDF to use within SalesCTRL. Printing to this printer outside of SalesCTRL includes a product nag message in the body of the PDF document.
ActiveFax®	Document faxing is available through the optional faxing software application, ActiveFax – www.actfax.com
Data Synchronization	Windows Server 2003 or later is required for this option.
Accounting HotLink™	Refer to the application specific setup documentation for the optional Open Systems® Accounting Software and TRAVERSE® HotLink.
Microsoft Outlook	Select Tools, Options. On the Mail Format Tab, verify that the “Use Microsoft Office Word <Version> to edit e-mail messages” box is unchecked. For Office older than 2003, verify the "Compose in this format" field, pull-down is set to Outlook Rich Text, plain text or HTML instead of Microsoft Word.
Microsoft Word	Select Tools, Options. On the following tabs, verify the settings: Print Tab - verify the "background printing" box is not marked and the "Update Fields" and "Update Links" boxes are marked. Save Tab - verify that the "auto-save" and "background saves" boxes are not marked. General Tab - verify that "update automatic links at open" box is marked.

Installation – Single-user, Network, Update, and Evaluation

Insert the SalesCTRL CD in your CD-ROM drive and the installation program will launch if the Windows Auto Run feature is enabled. **Note: Install from the server when running SalesCTRL on a network.** If the Auto Run feature is not enabled or you have downloaded the software please choose from the following:

SCNew.EXE	<i>Network, Single-user or Evaluation</i>
SCUpdate.EXE	<i>Update to existing installation</i>
SCWkstn.EXE	<i>Workstation Installation - run only <u>after</u> Network install</i>

Choose Full Installation of SalesCTRL, Uppdate Existing SalesCTRL, or SalesCTRL Workstation Installation. The installation wizard guides you through the rest of the installation procedure.

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If you are installing a single-user version or Evaluation Copy of SalesCTRL, use the Browse... button to create a new folder. When you install on the network you must specify your network directory.

SCNew.exe

Choose Full Installation if you are installing a New or Evaluation copy of SalesCTRL. You **MUST** install at the file server as administrator for a network installation of a New or a network Evaluation of SalesCTRL, and specify the network directory to create for SalesCTRL.

Please note the installation process may require a server reboot upon completion.

Login as **ADM** (no password required) using the SalesCTRL shortcut on the server desktop and select OK to Apply The Updates.

Single-user installation directory defaults to c:\salesctrl and requires administrator access on the computer.

Note: Vista® and Windows® 7 users must right click on SCNew.exe and Select "Run as aadministrator".

Evaluation software users login in as **ADM** (no password required) and can test drive the software for 60-days before the purchase of an activation license key is required.

Network Workstation Installation

Insert the SalesCTRL CD in your CD-ROM drive and the installation program will launch if the Windows Auto Run feature is enabled. If the Auto Run feature is not enabled or you have downloaded the software please choose the following to install SalesCTRL on your workstation after you have completed the network installation:

SCwkstn.exe

Note: The workstation component is not required for a Terminal Server installation for RDP users, only for the workstations mapped to the server.

The workstation installation wizard allows you to select the network destination folder where SalesCTRL is installed with a Browse... Button. Do not install on your workstation local hard drive.

You must reboot the workstation after completing the workstation install.

Verify Installation of The Software Update

After installing a SalesCTRL update, always login and confirm the Build Date and Version through Help | About This Database on the menu toolbar. The updated information means you have installed the SalesCTRL update to the correct directory on your computer. If this information does not change from the previous installation please confirm the correct directory is selected during the installation process and the correct scupdate.exe program was installed.

Click Yes Utility - Microsoft Outlook Security Prompt

This is an Outlook security feature introduced in Outlook 2000 (SR2 and newer), and installed by default with Outlook 2002 and Outlook 2003. This feature helps guard against most viruses that are spread via attachments to email messages as well as protects users from worm viruses that replicate through Microsoft Outlook. However, this improvement is annoying when third-party software like SalesCTRL uses Outlook for sending email.

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A freeware utility called ClickYes is installed in the SalesCTRL program directory that automatically clicks the Yes button for the Outlook security prompt when sending an e-mail from any email field in SalesCTRL. It does not affect any other windows with Yes buttons.

Network

Run the ClickYesSetup program from the mapped SalesCTRL directory at each workstation, right click on the ClickYes icon toolbar after installation, and select Start on Logon.

Terminal Server / Remote Desktop Services

Login as administrator on the server and Run the ClickYesSetup program through Add/Remove Programs or Install Application on the Terminal Server. Right click on the ClickYes icon toolbar after installation, and select Start on Logon.

Evaluation Software - User and Password Information

The User ID to login is **ADM** without a password and the User's Guide PDF is located on the CD. The software must be registered through the Register function on Help | About This Database to use it beyond the initial 60-day evaluation period. SalesCTRL is licensed by installation - contact us at (414) 362-9640 to obtain product activation keys for your computer if you have purchased a live copy of the software.

Interrupted Installation

The first time you launch SalesCTRL after installing, it automatically starts a Change Database process. If this process is interrupted for any reason, navigate using the Windows Explorer to the directory where SalesCTRL is installed, locate the file UPDPROG.DBF and remove it. Next, locate the file called UPSC97.OLD and rename it to UPSC97.APP. **Note:** If UPSC97.APP already exists from a prior interrupted installation, please rename UPSC97.APP to UPSC97OLD.APP. Verify that no one else is logged into SalesCTRL and allow the Change Database function to complete when you login again.