

INSTALLING CCRSOFTWARE PRODUCTS

This document provides a quick review of how to install CCRSoftware products with QuickBooks. This is a *summary* of the information found in the product documentation, which has more detail on the options that are available.

OPERATING REQUIREMENTS

CCRSoftware products have the following general requirements – you should check the documentation or our web site for specifics on the particular product you are working with. In some cases there may be limitations of features on older versions of QuickBooks. Non-US support also varies from product to product.

- QuickBooks Edition/Version:
 - **US Edition:** Our products will support the US edition of QuickBooks Pro and Premier, 2006 version or later, and the US edition of QuickBooks Enterprise, version 6 or later.
 - **Canadian Edition:** Our products will usually support the Canadian edition of QuickBooks Premier 2009 and later. Some of our products might not support Canadian tax features.
 - **UK Edition:** Our products will usually support the UK edition of QuickBooks Premier 2008 and later. Some of our products might not support the UK tax features.
 - **Australian Edition:** Our products will usually support the Australian version of QuickBooks Premier 2008/2009.
 - Other Non-US versions are not supported.
- **Microsoft Windows:** This application will be compatible with Microsoft Windows 7, 10 and 11.
- **Microsoft .NET Framework 2.0:**
- **Computer Display Resolution:** Your computer should have a display resolution of at least 800 X 600.

INSTALLATION OVERVIEW

Installing the application involves several steps. Note that you must install QuickBooks® on your computer prior to installing this application.

- **Application Installation:** Run the CCRSoftware **Setup** program to install the application on your computer. Please install the application in a local directory on your workstation. **Do not** install this on a “network share” drive. You should be logged in with a Windows admin account, and select the option to install for “all users”.
- Start QuickBooks® and open your company file as the administrator in single user mode. Run the application (found in the *CCRSoftware* folder of the Windows Program menu).
- **Program Setup:** If this is the first time you have run a CCRSoftware application on this computer you will be asked for a location to save a parameter file – **we recommend that you choose the location where your data file resides**. This is very important – you must choose a location that all users have read/write/create permissions, and you must select the same location on each workstation that you install this software onto. **If you are reinstalling on a computer or computer network where this product has been used before** you want to select the SAME location as you used before. Your preference settings are saved at this location.
- **Company Setup:** QuickBooks® will ask you if it is OK for this application to access your data – say “Yes, whenever this QuickBooks company file is open”.

- **Registration:** When you first install the application it will run in a trial mode, which will allow you to use the application at no charge for up to 30 days. You can select “Don’t Register” to start with (you can register the application later).
- **Preferences:** Some CCRSoftware products will ask for additional setup information. This information can be found in the program documentation, which is available either on our web site or as a PDF file in your Programs/CCRSoftware menu.
- **QuickBooks® Setup:** Some CCRSoftware products will require changes in your QuickBooks company file to work – such as adding custom fields to order templates, and so forth.

APPLICATION INSTALLATION

Prior to installing this application you must install QuickBooks on the computer workstation that you wish to use.

Run the **Setup** program that you have been provided. The setup program will lead you through the simple steps necessary. Please note the following:

- You should install the application while logged in as the **administrative user** of your computer system.
- **The Microsoft .NET Framework version 2.0 must be installed on your computer.** If it hasn’t already been installed, you will be prompted to install it. You will need to restart the CCRSoftware application again after this process.
- Choose to install this for **all users**.
- **Please install this application in its own subdirectory** – it is best to not install multiple CCRSoftware products to the same folder as other products. Use the default location that it recommends.
- **Install the application on your local disk drive** – don’t install this to a shared network drive, or a *mapped drive*. The application should be run from a local drive to avoid security warnings.

When the setup program is complete the CCRSoftware application is installed on your computer. Detailed instructions on setup (including specific instructions for features unique to this application) can be found in your Windows program menu, in the *CCRSoftware* folder (you will see a PDF documentation file). You can also find detailed instructions for most CCRSoftware applications on our web page (www.ccrsoftware.com).

PROGRAM SETUP

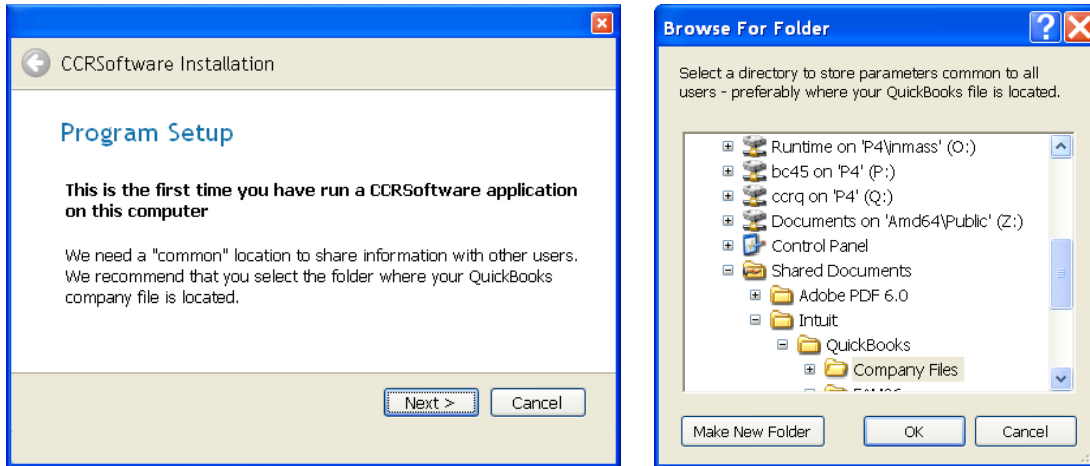
After the program is installed, you must set it up to work with your QuickBooks company file.

Start QuickBooks® and log in to the company file as the Administrative User: You must have QuickBooks® running, with the company file open, and you must be logged in as the “administrative user” **in single user mode**.

Start the CCRSoftware application: The application can be found in the Windows program menu, usually in the CCRSoftware folder.

The first time that you run any CCRSoftware application on a computer you will see the *Program Setup* wizard. This will only be done one time per computer, AND if you are running in a multi user situation it will occur on each computer you use.

Please note that the following screen shots may differ slightly in various CCRSoftware applications, as the technology has evolved over the years. Each app will be basically the same as shown here.

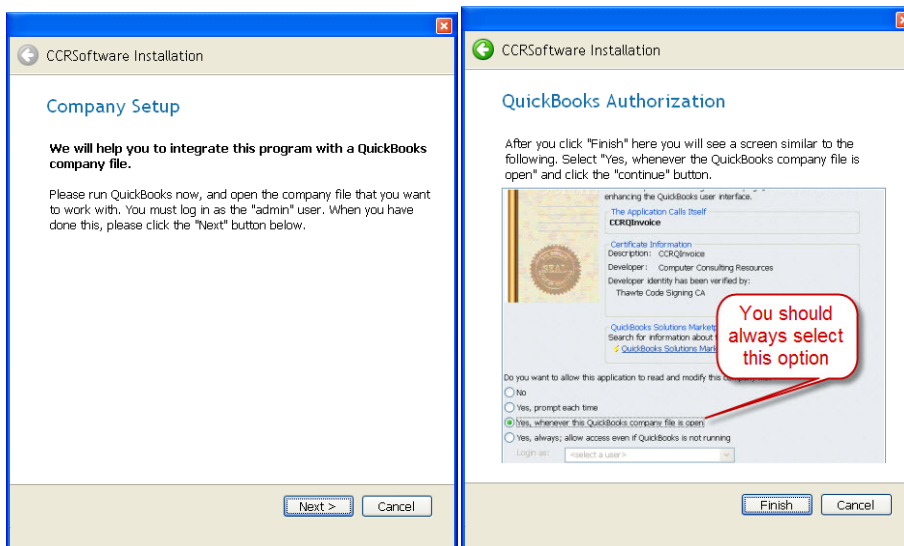


The *program setup* step asks you for a place to store some “common” information. **It is important that you select a location that is accessible to all QuickBooks® users** if you are running in a multi-user environment. The location where your QuickBooks® data files are stored is a good choice. The default that is shown is where your version of QuickBooks® would store the data files in a local folder on your workstation, which isn’t always the best place if you have a multi user installation. It is important that all users have read/write/create permission in this location.

Note that you will see this each time you install the application on a new computer workstation. It is important that you specify the same location from each workstation, so that they all have access to the same folder.

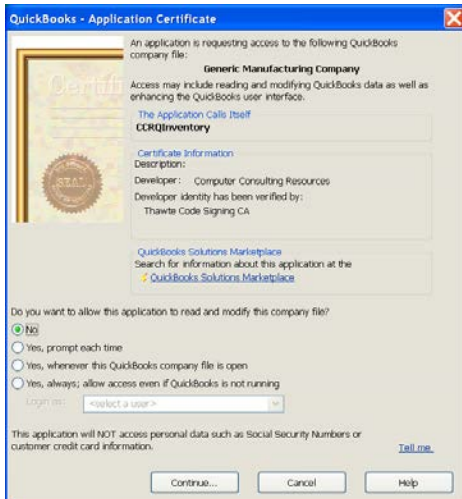
COMPANY SETUP

The first time that you use a CCRSoftware application with a particular QuickBooks® company file you will be asked to “authorize” access to your data. This is why you must have the company file open as the “admin” user – only the admin user can authorize this.



Click the *finish* button in the wizard.

QuickBooks® won't allow an outside application to access your company data without you giving explicit approval, as a security measure. This is a good thing! Applications cannot get to your information without you knowing what is going on.

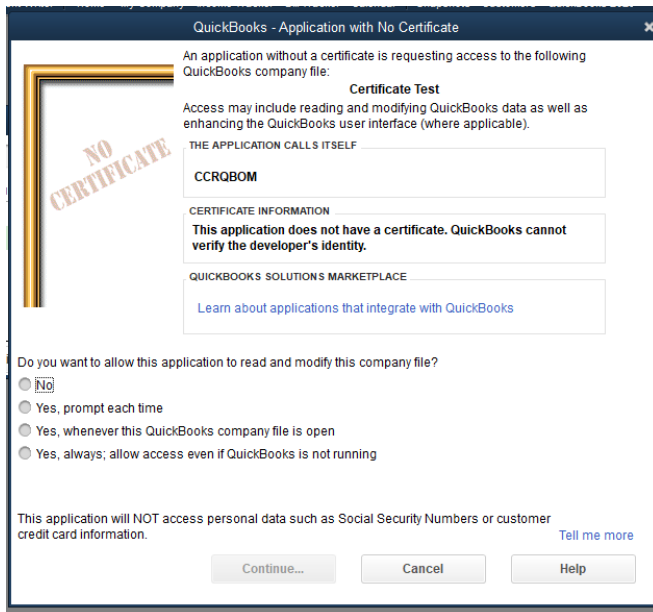


When the application first accesses your QuickBooks company data (as a part of the installation process), QuickBooks will open an authorization screen similar to what is shown here. You must give the program permission to access your company data.

Select **Yes, whenever this QuickBooks company file is open**.

This is usually the most appropriate setting. There are other variations but this generally works the best. You can change these settings later in your QuickBooks *preference* settings.

PLEASE NOTE that if you have installed the “revoked certificate” patch (you will know if this applies to you), the certificate screen will be different. DO NOT WORRY, this is not a problem, the software is safe to use.



REGISTRATION

When you install this application on a computer for the first time, it will be set up with a “trial period”. You will have access to all features for a period of 30 days from the time that you install the application. This allows you to evaluate the application to determine if it fits your needs.

The very first time that you run the application on a computer you will see a Registration screen.

STANDARD RELEASE VERSIONS

For a *standard release* product your serial number (registration key) is in this format:
XXXXX-XXXXX-XXXXX-XXXXX



If you have been provided with a serial number please enter your name, company name, and serial number in the appropriate locations. Then press the *Register* key. This will unlock the application for use on this computer.

Do not click the *I already have a license* link, even if you believe that you already have a license number. This is

only used in special situations (our tech support staff will tell you if you need to use this link).

If you do not have a serial number you can run the application for 30 days after installation. Select *Don't Register*, and a screen similar to this will appear.

Click the *Try* button to continue as a trial application. Each time that you start the application this screen will appear, until you enter a serial number.



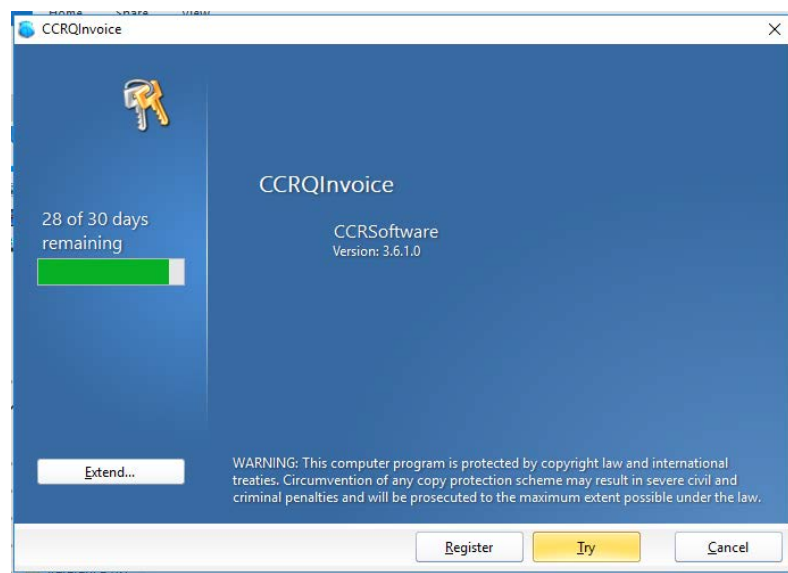
If you have decided to purchase the application and have been provided with a serial number, click the *Register* button on this screen, and you will be shown the Registration screen.

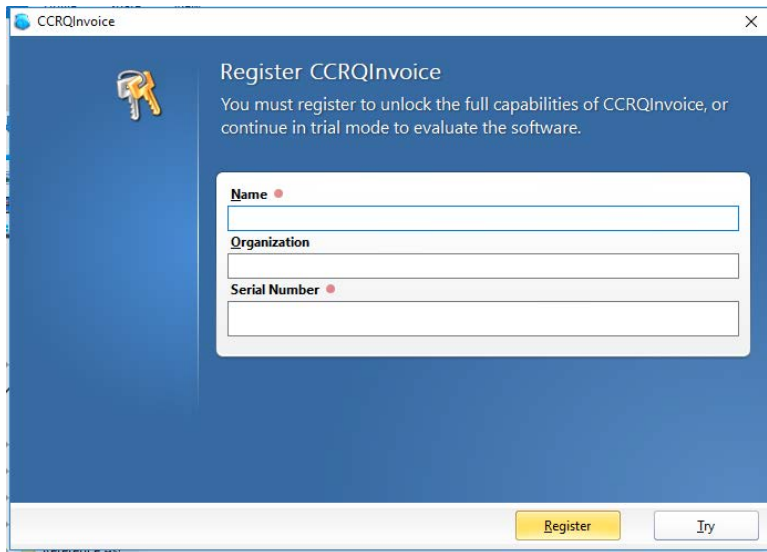
PRE RELEASE VERSIONS

For a *pre release* product your serial number (registration key) will start with “STD” and will be in this format:

STD-XXXXX-XXXXX-XXXX-XXXX

You can click the *Try* button to run this as a demo version (limit 30 days), or click the *Register* button to enter your registration key. Don't bother clicking the *Extend* button, you cannot use that to extend your demo period.





PREFERENCES

With some CCRSoftware programs, the first time you run the program you may be presented with a “wizard” that will help you set up some initial preference settings. You can always change these later by selecting the *preference* function from the main menu. Some applications might not perform this step. Details on these preferences can be found in the documentation, which you can find as a PDF file in the Windows Programs menu (in the *CCRSoftware* folder) or on our web site (www.ccrsoftware.com). Some CCRSoftware applications don’t need you to set up preferences, so you might not see a setup wizard.



QUICKBOOKS® SETUP

Some CCRSoftware applications may require additional steps to configure QuickBooks to support features that you wish to use. This will be explained in the program documentation.