

Simple Accounting for Forms Experts

SAFE

Getting Started

(What You Need To Know To Install And Begin Using SAFE)

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INSTALLING SIMPLE ACCOUNTING™

Installing Simple Accounting for Forms Experts is *simple* and below you will find step-by-step instructions that prove it! However, before actually beginning the installation of the program, please read over our "Getting Started" topic and do a bit of advance planning so that once you have SAFE installed, you can begin working with it effectively right away. If you'll be running the program on a network then you or your network administrator should have a look at our "Networking" topic. Investing a little time in planning now insures your success using with Simple Accounting!

1. Insert the CD into your CD-ROM drive. The setup program is designed to start automatically on most computers. If the setup program starts, please skip to Step #4, otherwise...

2. Click the [Start] button then click [Run] from the menu.

3. In the Open box, type: **D:\AUTORUN [enter]**

...where 'D' is the drive letter of your CD-ROM drive.

TIP: If you do not know the drive letter of your CD-ROM, click the [Browse] button in the Run Window to locate your CD-ROM and look within it for the file AUTORUN.

4. Setup now begins. A message box appears saying, "This will install Simple Accounting for Forms Experts EE Version XX on your computer. Do you wish to continue?" Click [Yes] to proceed with installation.

5. The Welcome screen appears, which recommends that you close all other programs. But of course, you took care of that in step 1 above, so click [Next].

6. The Simple Accounting for Forms Experts License Agreement appears. **Please read this carefully**, then click [Yes] to accept the terms and proceed with the installation.

7. You will now be asked to enter a password required to extract the attached files. Please enter the six digit numeric installation we've provided on your invoice and click [OK]. Setup will begin extracting the actual program files. A thermometer appears to show this progressing.

Note: You may be asked to enter this password again later in the installation. This is perfectly normal. If this happens simply enter the same password again.

8. You will then be prompted to choose the destination directory. The default is C:\SIMPLE. However, if you are installing to a network server, you may wish to specify a folder on your network server. (You should consult with your Network Administrator to select a folder on your server.) After making your selection, click [Next].

9. Now choose which components are to be installed. After making your selections, click [Next].

- **If this is your first time installing Simple Accounting, use the default selections.** This will install two companies: *Demonstration* and *Clean*. The Demonstration version includes sample transactions illustrating orders, checks, payments, etc. The Clean company is waiting for *you* to enter *your* data! After Setup is complete, you will be able to run SAFE with either set of data, any time you like.

TIP: The Demonstration company can be removed in the future if you so desire, but you may want to keep it around for quite some time in order to try new things without affecting the "real" books!

- **If you are upgrading a previous installation** be certain to click [Change] on the clean data/upgrade option and carefully review each sub option before proceeding!

10. Next you will see the Program Folder selection window. We recommend using the default 'Simple Accounting'. Click [Next] to proceed to start copying files. Copying usually takes just a minute or two.

IF YOU RECEIVE AN ERROR WHILE FILES ARE COPYING: Once in a great while, you may encounter an error installing from a workstation to a network server drive. If you do receive an error, cancel Setup and try installing directly to the server.

Congratulations!

Your installation is complete! You should now have a Simple Accounting program group in your Start menu with separate menu entries for Demonstration and Clean versions of SAFE. Right now, we suggest that you view the README files for any last minute notes.

GETTING STARTED WITH SIMPLE ACCOUNTING

Success in most things usually requires planning and Simple Accounting is no exception to this rule. Before you can actually be productive, there are two phases to plan for when installing SAFE: before you run Setup and after. Below are some things to do at both points in the process.

Things You Should Attend To Immediately *Before* You Run Setup:

- **Learn how to access the On-Line Help and Movies.** You can easily do this before or after installation using the procedure described on the following page.
- **Will you be using SAFE on a network?** If so, you should read the **Networking** topic located in the online documentation. (See the instructions below for getting there!). If not, then simply let the Setup program use the default location and you're that much closer to "blast off"!

Things You Should Attend To Immediately *After* You Run Setup:

Once you've installed the program and start it for the first time, you will be prompted to enter the Global setup information. By reviewing and planning for the following items you will be prepared to enter the appropriate information and get right to using the program! (You may want to watch the movie on Global Options for tips entering this information and navigating the program. Instructions below.)

- **Read the Configuring SAFE EE topic located in our online documentation** There you will find complete step-by-step instructions for getting things set up just the way you'd like them. Along the way, you will find links to tutorial movies included on the CD for nearly every step. For example, would you like to see how to set up a Terms ID? Simply click on the movie icon within the section on terms and you will be whisked away to our movie library where you can locate and view the movie that will literally let you see how it's done!
- **Choose a default Employee ID.** This person who will have access to various administrative functions in SAFE. This can be changed later on, if needed.
- **Decide on a Global (or master) password.** The default is SIMPLE and many of our customers leave it at that, but you may want to change it to something else for increased security.
- **Decide if you will use the default chart of accounts included with SAFE.** Our default chart of accounts has been approved by the DMIA and you can easily add more accounts as the need arises. Another plus to using the included chart of accounts is that you'll be up and "running" just that much faster. But please, make your decision carefully! Only you and your accountant know what is best for your company.
- **Gather the information for your primary bank account,** including the bank's address, phone numbers, account number, and starting check number.
- **Plan your coding conventions for things such as customers, vendors, products, etc.**

What Next?

We recommend that you explore the extensive help we provide to guide you to productivity. Granted, it's very tempting to fire up SAFE without watching a single movie or reading any of the On-Line Help file, but: knowledge is power! Exploring the following topics will provide you with a steady path to learning SAFE.

We suggest you begin by reading the General chapter of SAFE and watching the following Movies in this order:

- | | | |
|-------------------|--------------------------------------|--|
| 1. Global options | 6. Bank Accounts / Starting Balances | 11. Entering Beginning Customer Balances |
| 2. Employees | 7. Sales Tax IDs | 12. Entering Beginning Vendor Balances |
| 3. G/L Accounts | 8. Customers | 13. Entering Beginning Inventory |
| 4. Terms IDs | 9. Product Types | 14. Entering Your Beginning G/L Balances |
| 5. Vendors | 10. Products | 15. Closing the Prior Period |

All these movies are quite short. Those movies in **red** are extremely important! After you have these set up your next step should be to view the movies on **Sales Order Basics**. With these under your belt, you should have a pretty good idea of how all these pieces fit together.



LEARNING SIMPLE ACCOUNTING

This software includes two very powerful ways to help you master Simple Accounting: **Tutorial Movies** and **On-Line Help**.

- **Tutorial Movies** are videos you watch at your computer that show one of our techs performing procedures in Simple Accounting in a step-by-step video manner.
- **On-Line Help**, in contrast, is a completely indexed reference of all the features in SAFE with thousands of hyperlinks to help you navigate from one topic to another.



Exploring The On-Line Help

To access the on-line help directly from your CD:

1. Open Windows Explorer and browse your CD drive.
2. To view the On-Line Help, simply double click on the SAFE HLP file

To access the online documentation once you've installed SAFE

Simply start SAFE and from within the SAFE program you can either:

1. Click on Help Menu, located at the top right-hand side of the screen. From there you may choose Contents or "Search for Help On". Either way, you will have hundreds of topics at your fingertips to assist you in getting the most of SAFE!
2. Press the <F1> key at any time to bring up *context sensitive* help explaining the area of the program you are currently working with.

Key Topics

To specifically locate the **Networking** topic, start Help and choose "Search for Help on..." and type in "Networking". With the correct topic highlighted, click on [Display].

To specifically locate the **Getting Started** (Configuring SAFE EE) topic in our online documentation, start Help and choose Contents and then Start Up, and then Configuring SAFE EE. Or you can choose "Search for Help on..." and type in "Getting Started". With the correct topic highlighted, click on [Display].



Viewing Our Tutorial Movies

You'll also find included on the CD a number of *movies* that will answer many common questions about SAFE. If these movies only whet your appetite for more then grab the popcorn and visit us at our website where you'll find a growing library of tutorial movies on many different aspects of using SAFE EE.

To View The Movie Tutorials Included On Your CD:

1. Open Windows Explorer and browse your CD drive.
2. Start the Movies program by double clicking on it. The first movie to watch is HELLO.EXE. This is not only an introduction to SAFE, but also installs a small video driver that enables you to watch all other Simple Accounting Movie Tutorials!

Note: If you run HELLO.EXE and are still have trouble viewing the movies, it may be because you do not have Windows Media Player or another program which can play videos on your PC. You can install Windows Media Player by going to [Start], then Settings, then Add/Remove Programs and clicking on the Windows Programs tab.

To View Even More Movie Tutorials From The Internet:

1. Open your web browser and point it to: www.suntowersystems.com/support.htm
2. Click on the purple movie camera icon to bring up a current list of available tutorials!

CUSTOMER SUPPORT OPTIONS

We strive to provide you with the best accounting software possible! You'll find that we also strive to provide the best customer support possible, too! There are many different avenues of support available to you from voice to email to our Remote Support Service (RSS). We'll outline those options for you here.

Voice: (206) 241-4859 (West Coast: 8 a.m. to 6 p.m. PST)
(334) 679-4192 (East Coast: 8 a.m. to 3 p.m. EST)
There is no charge for routine calls under 3 minutes. Longer calls are billed to your RSS subscription.

Fax: (206) 241-4879. (West Coast)
(334) 675-6116. (East Coast)
There is no charge for a fax back response to most questions.

Email: support@suntowersystems.com
Again, no charge for an email response to most questions.

Internet: www.suntowersystems.com - Our web site is the place to receive free updates to our software, timely notes about Simple Accounting, and answers to more involved technical questions. If you don't have a modem, contact us, and we'll provide you one at a deep discount!

Remote Support Service™ Subscribe to **RSS**, our premium service contract. You'll receive one year or 12 hours of support (whichever comes first) for only \$699. If you want **fast** service when you do have a problem, then you can't afford not to subscribe! With RSS we can dial directly to your computers to diagnose problems or provide on-line training. You won't use RSS often, but when you do, it's good to know you have it! We feel very strongly about this service, and evidently so do our customers: ninety five percent of our subscribers renew RSS year after year!

Note: We use and recommend iCloseUp® from Norton-Lambert, an amazing program for remote control and file transfer. iClose-Up is available to RSS subscribers at a specially discounted price!

As you can see, we provide strong support via the Internet with our email, website, and iCloseUp (the i stands for Internet!) services. If you're not already "on-line", then let us encourage you to get there! There are thousands of ISP's (Internet Service Providers) out there waiting to serve you! Some of them are even free! But, as with most things, you get what you pay for! However, you should be able to find a quality provider for \$20 per month. Find a reputable ISP in your local area and sign up today!

Note To Users Of America On-Line: AOL is not really a conventional ISP. Due to the technical limitations of AOL, we are unable to provide remote support to users of America On-Line. We strongly suggest you switch to another provider in order that we may provide you with the best possible service.