Simple Accounting: Post Installation Laundry List

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Thanks for purchasing Simple Accounting for Forms Experts for Windows (SAFE for Short!). Now what? There is, obviously, a lot more to getting up and running than simply installing the CD. So here are a few items to get you from installed to productive. Please read thoroughly!

#1) UNLOCK SAFE!

You will need to enter your Multi-User Access Code to disable the 200 transaction limit of the Evaluation software and enable multi-user capabilities.

To do this, follow these SIMPLE steps!
1. Start SAFE
2. Go to FILES|Setup/Global Options
3. Select the Security Tab
4. Enter the number provided on your invoice in the Access Code field. (Enter it CAREFULLY!):
5. Press the [Ok] button to save your changes and enable multi-user mode.

#2) CHECK YOUR INTERNET CONNECTION!

We require that you have an internet connection which is linked to your server in order for us to provide remote technical support. Need an ISP? May we recommend Compuserve (800)-848-8990 or AT&T Worldnet (800)-967-5363? Both have low-cost plans for infrequent surfers.

Note: We do not support or recommend America On-Line (AOL)!

#3) GET ICLOSE-UP!

The latest version of Close-Up (dubbed iClose-Up) is available and can be had from the web by doing the following:
1. Open your web browser and go to **www.nortonlambert.com**
2. Click on the Trial Version
3. Fill out the form, then download the 9MB zip file. Be patient! This could take some time.
4. While you are there, you should ALSO download Microsoft's NetMeeting 3.01 (it's free), or from our web site (www.suntowersystems.com) in the downloads page.
5. The file you receive will need to be unzipped to a temp folder on your computer.
6. FINALLY run the installation program in the zip file. There is a 30 day time-lock, but you will receive a password from Norton-Lambert to unlock this upgrade, PLUS the CD in a couple of weeks
7. Install NetMeeting.

Let us know when it is installed so we can test.

#4) SEND US YOUR DATA FOR CONVERSION

Remember, it may take us between five and seven days to convert your existing data into Simple Accounting format. You should, therefore, get this information to us as early in this process as possible. For more information on what can and cannot be converted, and approximate costs, please check our web site: www.suntowersystems.com/convertd.htm

#5) INSTALL WITH FRESH DATA IF NEEDED.

After evaluating SAFE for a while, it is often nice to be able to clear out 'practice' data and start again with a clean slate. Although we provide a Demonstration Company for you to practice with when you begin, you may have used the "real" company to do some experimenting and want to clear that out and start over.

The easiest way to do this is to simply re-install the program from your SETUP.EXE file (on your CD, or from the SETUPEX.EXE file you downloaded from our web site. Before you do this, however, you will need to erase all data files in the Simple Accounting folder as the setup program will **not** erase these.

To erase all data files do the following:
1. Press the Windows [Start] button, the select [Find], then Files & Folders.
2. In the Named field, enter: *.TPS

   ....then click [Find Now]
3. A list of Simple Accounting data files will appear. Press Ctrl/A to select all these files.
4. Now press <Del> to send them all to the Recycle Bin.

#6) SEND US YOUR FORMS!

If you would like us to design your invoice, statement, POs, etc, send them on down! Complete information on this can be found on our web site: www.suntowersystems.com/fds.htm.
    NEW: You should also send us a BMP or GIF or JPG scan of your bank deposit slip's MICR code for setting up the SAFE bank deposit slip. There is no charge for this!

#7) SIGN UP FOR TRAINING AS SOON AS POSSIBLE!

If you are interested in having one of our instructors come to your site to provide training, it is important to get information and set dates early.
1. We are currently requiring a 3-4 week lead time due to the popularity of SAFE.
2. We require a 33% deposit plus airfare to hold dates. The balance is due one week before training commences.
3. We will also need directions (and even better, a map) from the airport to your offices!

4. An instructor will be assigned and you will be contacted to discuss itinerary, materials, and anything else you need to know in order to get ready. At that time, you may be asked to have certain materials prepared (such as reports, lists of questions, etc.)

5. You are not expected to provide transportation, food, drinks, lodging, entertainment, trinkets, free t-shirts, or anything else to the instructor. Your only responsibility is to learn all you can during the time he/she is in your offices.

6. **If you need to reschedule**, you can do so within one week of class. We will apply your deposit to the new dates so long as we receive payment for the balance immediately upon rescheduling. We will *attempt* to switch travel bookings, although you are responsible for any price differences or flight change fees. If you are not willing to commit to a firm date when you reschedule, you forfeit all payments.

    If you need to cancel with more than a week before training, you lose your deposit, but the balance of any payments you make will be refunded immediately. If you cancel within seven days of training, you forfeit all payments.

#6) CHECK YOUR EQUIPMENT!

It is extremely important that your hardware and other software be <dawn>compatible </dawn>with SAFE. Please make certain that the following guidelines are adhered to:

1. We strongly suggest that you use Windows NT Workstation, Windows 2000 or Windows 98 for clients. For W2K or NT Workstation you'll need at least 64MB of RAM. For Windows 98, you should have at least 32MB. More is always better, and in fact, we suggest twice these amounts for best performance.

2. We will support Windows 95 version B. If you have Windows 95 (original) or Windows 95a, you MUST upgrade these machines to Windows 95 B or Windows 98. There is a SERIOUS bug in earlier versions of Windows 95 which can cause problems for multi-user databases (such as SAFE). If you use Windows 95B, the same RAM requirements are in place as for Windows 98.

3. The machine we dial into for technical support (running Close-Up) MUST run either Windows 98, NT Workstation or NT Server. No exceptions. We suggest you obtain a high quality modem for this <dawn> purpose.</dawn> We specifically recommend the US Robotics Courier series. NOTE: We cannot recommend ANY of the lower-end US Robotics products as they are TERRIBLY unreliable.

4. For a server we support NT Server 4 or Small Business Server, each with SP4 or later. You -may- use Windows 98 as a file server for systems with three users or under but it is not suggested. If you do so, we strongly suggest upgrading the machine to at least 128MB of RAM. THE FILE SERVER COMPUTER MUST BE DEDICATED TO RUNNING SAFE. IF YOU ATTEMPT TO USE THE FILE SERVER COMPUTER ALSO AS A WORKSTATION YOU ARE ASKING FOR TROUBLE.

5. You can use any printer(s) you like so long as there are Windows drivers for them. If there are incompatibilities, you will need to contact your printer manufacturer for updated drivers, as we cannot possibly have details on every printer. We can tell you that the major brands (HP, Epson, IBM, Canon, Brother) should all work fine so long as you obtain current drivers. IMPORTANT: Usually if there is a problem it is because of the drivers being old. Check the manufacturer's web site for current versions.

6. As far as networking goes, we STRONGLY suggest that you have your network set up by a Microsoft Certified Professional. You can go to our web site www.suntowersystems.com/hotlink.htm or www.microsoft.com for a list of MCSEs in your area.
     FYI: IN FIFTEEN YEARS OF OPERATION, OUR UNHAPPIEST CUSTOMERS HAVE CONSISTENTLY BEEN THOSE WHO HAD A BROTHER-IN-LAW, FRIEND OF A FRIEND, OR 'REALLY BRIGHT COLLEGE KID' COME IN AND WIRE THEIR NETWORK. OUR ADVICE<dawn>: Stick to a professional.</dawn>

Thanks again for ordering SAFE and please don't hesitate to call us any time with your questions and comments.