SalesCTRL Installation Guide

June 2020

Hardware/Software Minimum Requirements

Hardware Workstation: 2.4GHz or faster with 8GB RAM
Server: Xeon® processor with 16GB or more RAM

Operating System Workstation: Windows 7 / Windows 8 / Windows 10
Note: Limited support for Windows 7 & 10 peer-to-peer
Windows Server: 2012R2 | 2016 | 2019
Terminal Server / Remote Desktop Services 2012R2 | 2016 | 2019

Microsoft Office® Install on the workstation or Remote Desktop Services Server prior to the installation of **SalesCTRL** (Outlook®, Word®, Excel® 2010 or later).

Installation Notes

Terminal Server There are two installation scenarios in a Terminal Server / Remote Desktop Services and Citrix® environment that determine where the software and workstation components are installed.   A server reboot maybe required so plan accordingly.

1. **SalesCTRL** is installed on a separate server other than the Terminal Server / Remote Desktop Services / Citrix server

   a. Install **SalesCTRL** on the server with full user access rights to the installation directory.
   b. Configure a mapped drive (not UNC) to this location from the Terminal Server / Remote Desktop Services / Citrix server
   c. Install the **SalesCTRL** workstation component (scwkstn.exe) through the Install Application on Terminal Server function for Windows Server 2012 R2 | 2016 | 2019 using the mapped drive configured in step b when prompted for the installation location
   d. Do not install through an RDP session

2. **SalesCTRL** is installed on the Terminal Server / Remote Desktop Services / Citrix server

   a. Install **SalesCTRL** (scnew.exe or scupdate.exe) through the Install Application on Terminal Server function for Windows Server 2012 R2 | 2016 | 2019
   b. Do not install through an RDP session
   c. Configure full user access rights to the installation directory.
   d. The **SalesCTRL** workstation component (scwkstn.exe) installation is NOT required for users who access the server through an RDP connection.
   e. Configure a mapped drive (not UNC) to the **SalesCTRL** installation directory on the server for any workstation that does not use an RDP connection.
   f. Install the **SalesCTRL** workstation component (scwkstn.exe) on any workstations that do not have an RDP connection to the server using the mapped drive configured in step e. when prompted for the installation location

Advanced|Concepts

Drive Mapping   UNC drive mapping and mapping directly to the network **SalesCTRL** folder is NOT supported. Please map to the network drive i.e. T:\Apps or T:\ instead of the directory where **SalesCTRL** is installed.

PDF Printer   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.

Data Synch   Windows Server 2012R2 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.

Backup   **SalesCTRL** does a lot of stuff but it doesn't back up your data. Please invest in a reliable backup solution that includes local and offsite storage of your **SalesCTRL** programs and data. Don't forget to periodically perform a test restore to confirm you can recover your information.

Screen Savers   Please disable any screen saver and sleep functions on a network workstation that is used for **SalesCTRL**.

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

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

The installation wizard guides you through the rest of the installation procedure.

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 and ensure full access rights are granted to all users.

SCNew.exe   Choose <u>F</u>ull Installation if you are installing a New or Evaluation copy of **SalesCTRL**. You MUST install <u>at the file server</u> <u>as administrator</u> for a network installation of a New or Evaluation of **SalesCTRL**, and specify the network directory with full user rights to create for **SalesCTRL**.

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

Note: Windows® 7, 8, and 10 users must right click on SCNew.exe and Select "Run as administrator" for local single-user installation.

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

A single-user installation directory defaults to C:**SalesCTRL** and requires administrator access on the computer.

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.

SCUpdate.exe   Installing a **SalesCTRL** update follows the same steps as a new installation on a server or stand-alone computer.   Remember you must be the administrator with full rights.

First, confirm no one is logged into **SalesCTRL**, and complete a backup of the directory where **SalesCTRL** is installed.

Do not skip this step.

Login to **SalesCTRL** (on the server if possible for a network installation) and run the Sort Database / One Line Display function located under Admin | Database Menu for each database.

Run **SCupdate.exe** from a directory outside of the existing **SalesCTRL** directory and Browse to the correct location when prompted.

A server or computer reboot may be required upon completion.

Login to **SalesCTRL** (on the server if possible for a network installation) and proceed with the Change Database process prompt.   Do not allow any users access to **SalesCTRL** until this is completed.

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.

Network Workstation Installation

Choose the following to install **SalesCTRL** on your workstation after you have completed the server installation:

SCwkstn.exe

Note: The workstation component is not required for a Terminal Server installation for RDP users unless **SalesCTRL** is installed on a separate server as described in the Terminal Server Installation Notes.

Windows® 7, 8, and 10 users must run the SCwkstn.exe logged in as Administrator.

If this is a new workstation, please confirm the Windows drive mapping is correct **BEFORE** proceeding with the installation. See **Drive Mapping** above on Page 2 and check the other workstations on the network where **SalesCTRL** is in use

Click on More Info if the Windows protected your PC prompt appears and Run anyway.

The **SalesCTRL** workstation install updates the registry on the computer to display the mapped drives when prompted to select the network destination directory, and requires a reboot of your computer before proceeding.

Answer "Yes, restart the computer now", and click Finish.

Login to your workstation after the reboot, and wait for the **SalesCTRL** workstation installation prompt for User Name and Organization. Do not manually run SCwkstn.exe.

The workstation installation wizard prompts you to select the network destination folder where **SalesCTRL** is installed with the Browse Button**.**

Scroll down until you see the mapped drive where **SalesCTRL** installed, and select that directory.

Remember this must be a mapped drive – i.e. S:\apps

Do not install to your workstation directory.

You may be prompted to reboot the workstation after completing the workstation install.

ODBC Driver Installation

This driver may be required for new workstation installations (single-user and network) to provide the communication between **SalesCTRL** and Microsoft Office ®.   Please contact us if the file odbc6.zip is not located in the **SalesCTRL | UTIL** directory to obtain the current version.

Unzip the file to a directory other than the **SalesCTRL** installation directory, run Setup, and install the contents to your location workstation.

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® 2003 | 2007 | 2010 | 2013 | 2016 | 2019. 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.

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 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. 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.

Moving SalesCTRL

Moving your **SalesCTRL** installation to a different computer/server or directory location can be accomplished with these steps.

1. Confirm no one is logged into **SalesCTRL**
2. Copy the **SalesCTRL** directory to the new computer/server or directory location
3. Run scupdate.exe (confirm it is the same release or later as the current installation) on the new computer/server and use the directory where the **SalesCTRL** is copied to when prompted

4. After completion of the scupdate.exe install, login to **SalesCTRL** on the new computer/server and complete the Change Database process
5. Map a drive at each workstation to the **SalesCTRL** directory in a network or peer-to-peer environment.
6. Install scwkstn.exe (confirm it is the same release or later as the current installation) on each network workstation and use the directory where **SalesCTRL** is located when prompted
7. Login to **SalesCTRL** from each workstation, update a contact record or activity, and confirm the other workstations see the updated information

Slow Network Write Speeds – Windows Server 2012R2 | 2016

Windows 7, 8 and 10 users may encounter intermittent workstation disconnects or slow performance in a network environment.   This is documented in several on-line support threads.

https://social.technet.microsoft.com/Forums/en-US/7bd0aa5b-eb95-40a8-a56d-c6013273665c/extremely-slow-smb-network-speed-server-2012-r2?forum=winserver8gen

The resolution requires the following changes to the network adaptors installed in the file server under the advanced tab of the network drivers:

Disable these offload settings

- Ipv4 checksum offload
- largesend offload V2(ipv4)
- largesend offload V2(ipv6)
- VM queues
- TCP Checksum offload (ipv4)
- TCP checksum offload (ipv6)
- Udp checksum offload (ipv4)
- Udp checksum offload (ipv6)

Please confer with your network administrator or IT support person before making these changes.

Technical Support

        Phone: (414) 362-9640
        Email: support@advanced-concepts.com

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