

Installation Instructions for ServicePoint SQL

The following pages of instructions should allow you to successfully install the ServicePoint software. If you need assistance, please contact us toll free at 866-879-3867.

Requirements

Installation of ServicePoint SQL requires that the interfaced accounting software (CounterPoint SQL by Synchronics, Great Plains Dynamics from Microsoft Business Solutions, or PBS from Passport Software) already be installed on the target computer. Also, a version Microsoft SQL must be installed to support the SQL database access. **ServicePoint has been designed and tested for use with CounterPoint SQL version 8.3.x, Great Plains Dynamics versions 7.5 through 10.0, and Passport PBS versions 11.7 and 12. Microsoft SQL versions tested include MS SQL 2000 through 2008.**

Hardware that meets the requirements of the chosen accounting package will also support the use of ServicePoint SQL. Please refer to your accounting documentation for hardware and operating system platforms that are supported

Special note for Passport PBS users

If interfacing to PBS from Passport software, you will need to have a working copy of the AcuXDBC product installed. This is required for ServicePoint to have access to the PBS Vision system data files. To ensure proper access to the PBS company data by ServicePoint, define an odbc data source called "PBS" that is accessible from the workstations.

Installation

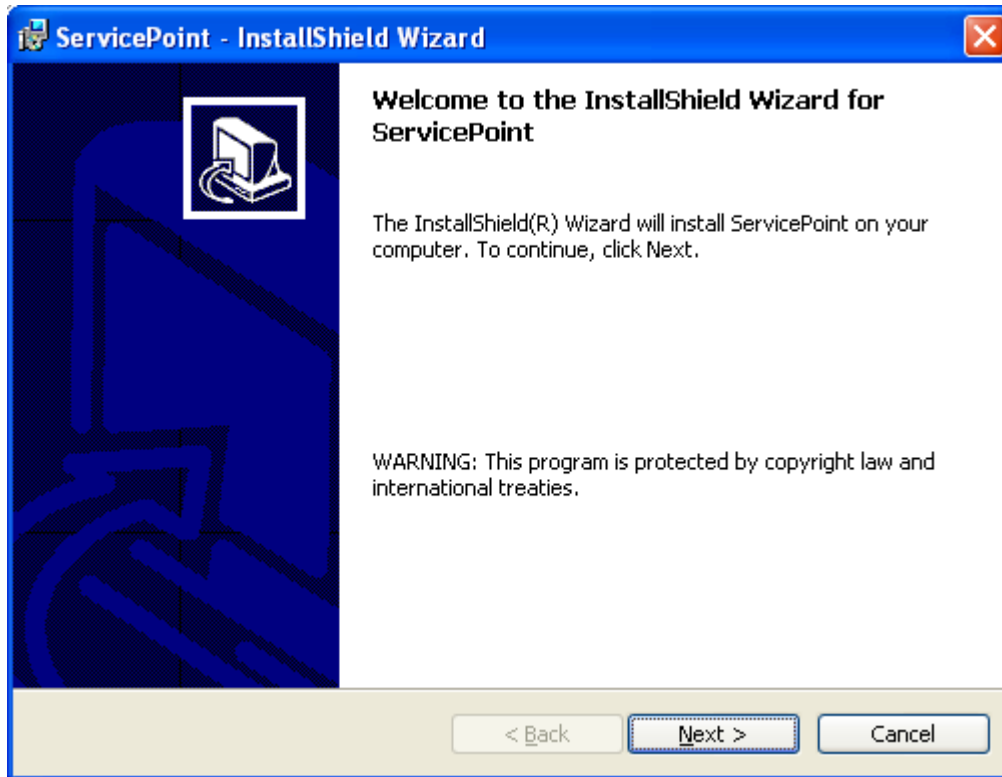
ServicePoint is a client/server application. Both a server install and a client (workstation) install must be done in order for the software to run. For a single station install, installing the ServicePoint server version and then the Workstation Client on the same computer will allow full use of the software. For multi-user network installs, the server install should be done into the desired network server location. **The workstation client must be installed onto each computer that will run the ServicePoint software.**

Download the proper installation module by using the link sent to you, or by going to <http://www.rtmcs.com/downloads.htm> and downloading the proper ServicePoint demo system for your platform. Demonstration software will be activated by applying the registration key per the instructions sent with your key.

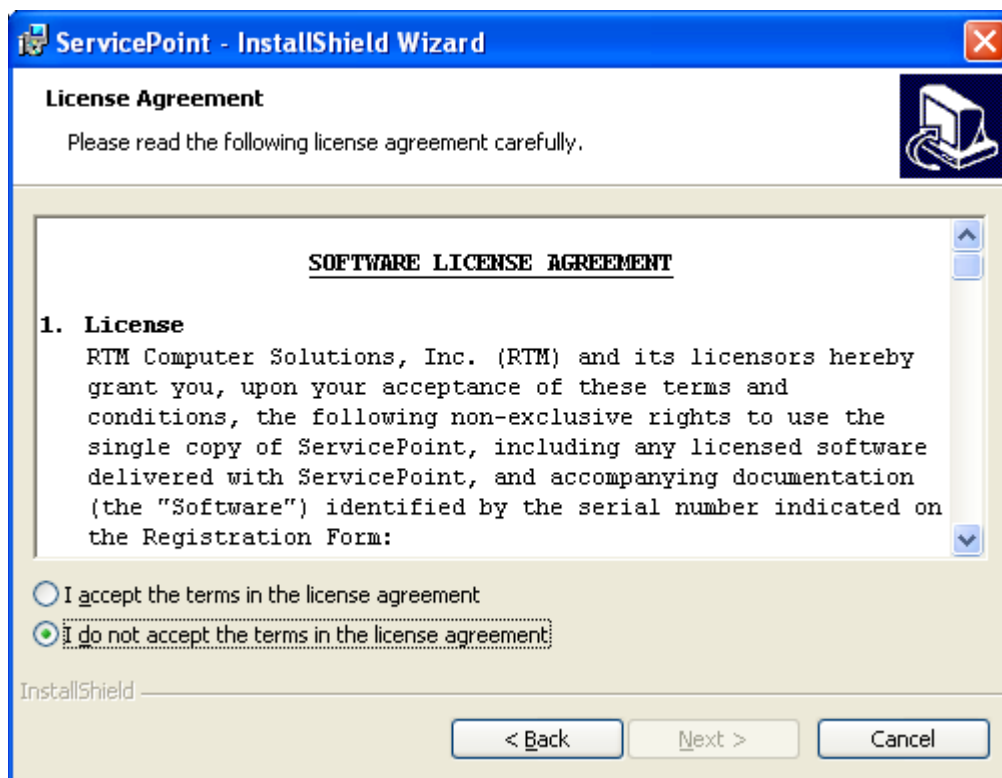
Unzip the downloaded file into a temporary directory. To initiate the server install, execute *Setup.exe* from the temporary location. This will perform the installation of the server portion of ServicePoint

The workstation client install can be run over a network from the ServicePoint network server directory after the server installation has completed. The workstation setup will be found in a subdirectory called "WorkstationClientInstall", directly under the server install location. The client install from the network can be started by double-clicking the file "*ServicePoint Client.msi*" in that directory. Please be sure that any previous installs of ServicePoint are removed using Windows Control Panel / Add Remove Programs before installing a new version of ServicePoint.

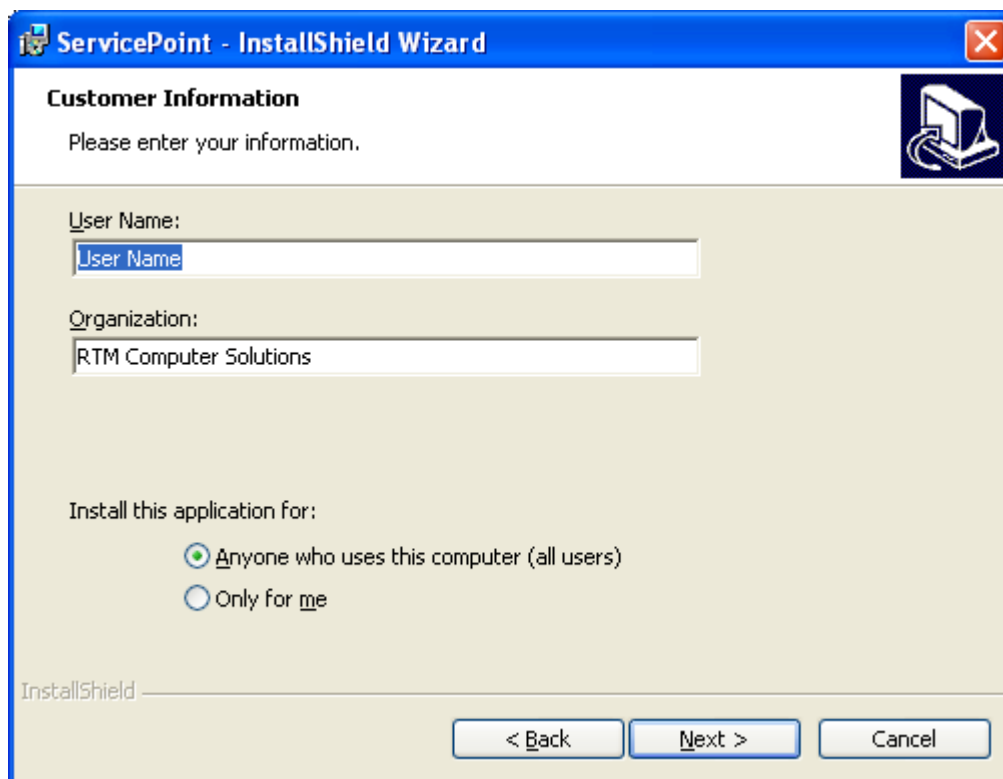
Upon invoking one of the installation routines, a screen will appear as the InstallShield Wizard is preparing for installation. Click the Next button to continue the installation once it is activated as shown below.



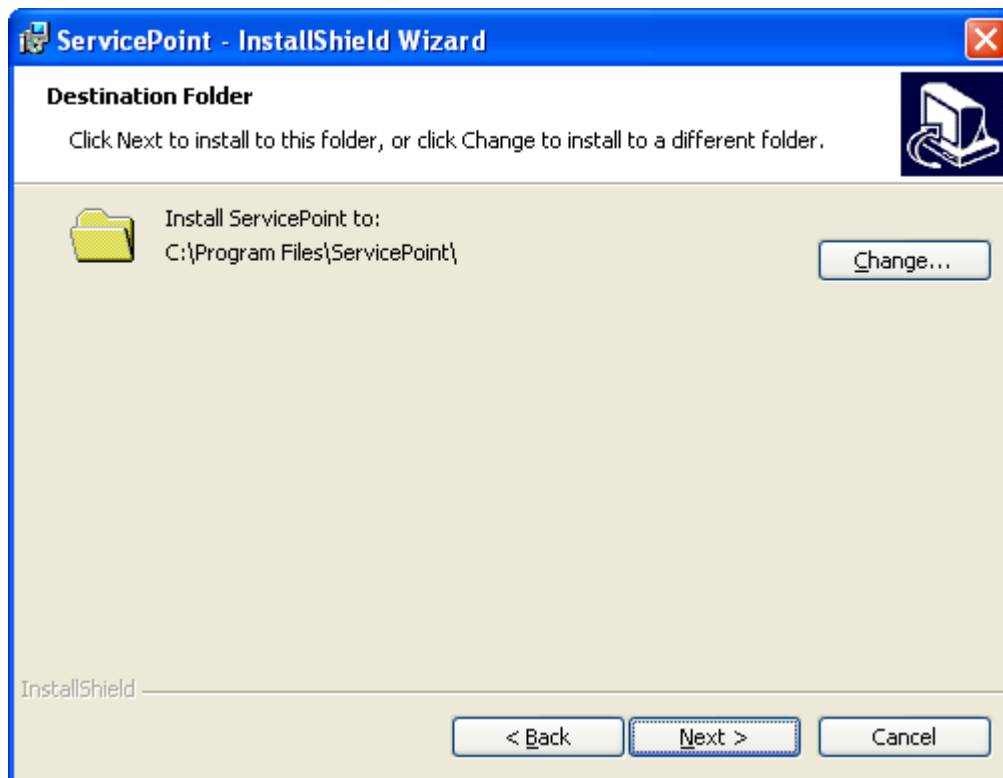
Review the license agreement and then click the top button to agree with the terms. Click the Next button to continue.



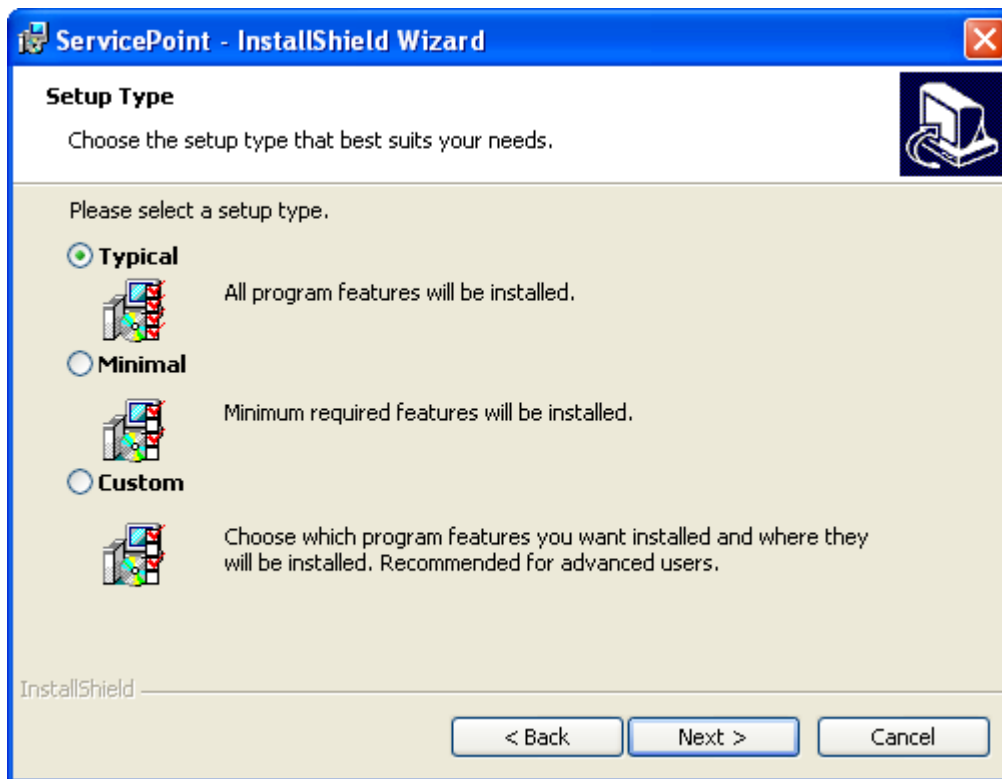
Edit the User Name and Organization, if needed, and then click the Next button to continue.



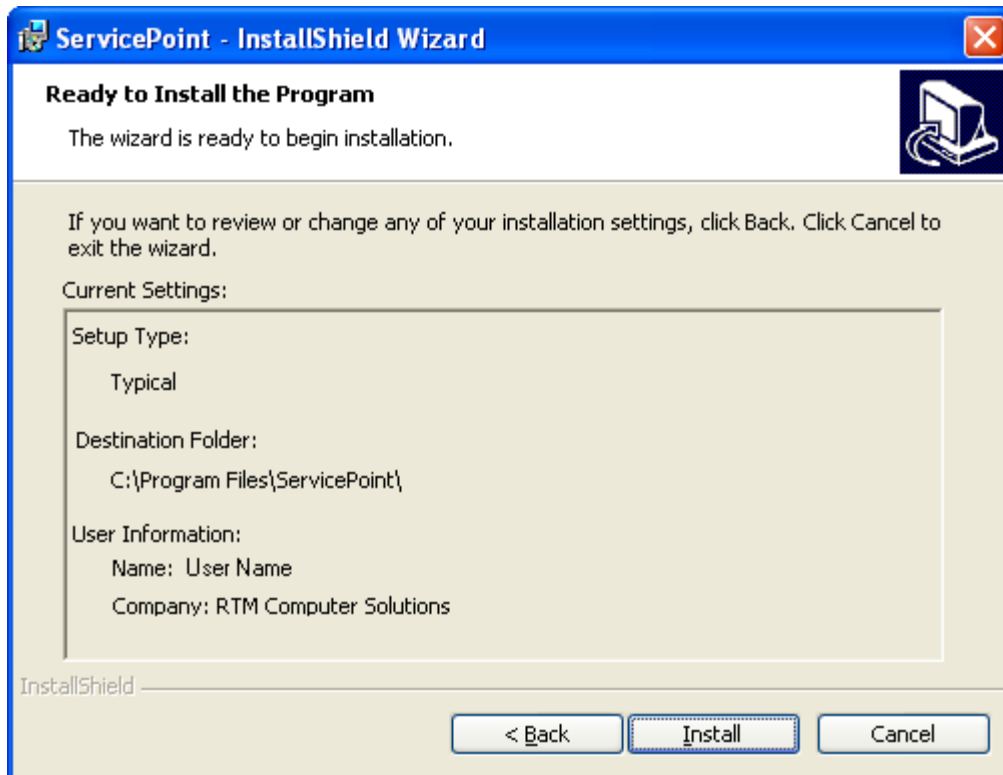
The default installation path will appear. To change the path, click the Change button and select the new path. Generally, the default installation path should be used.



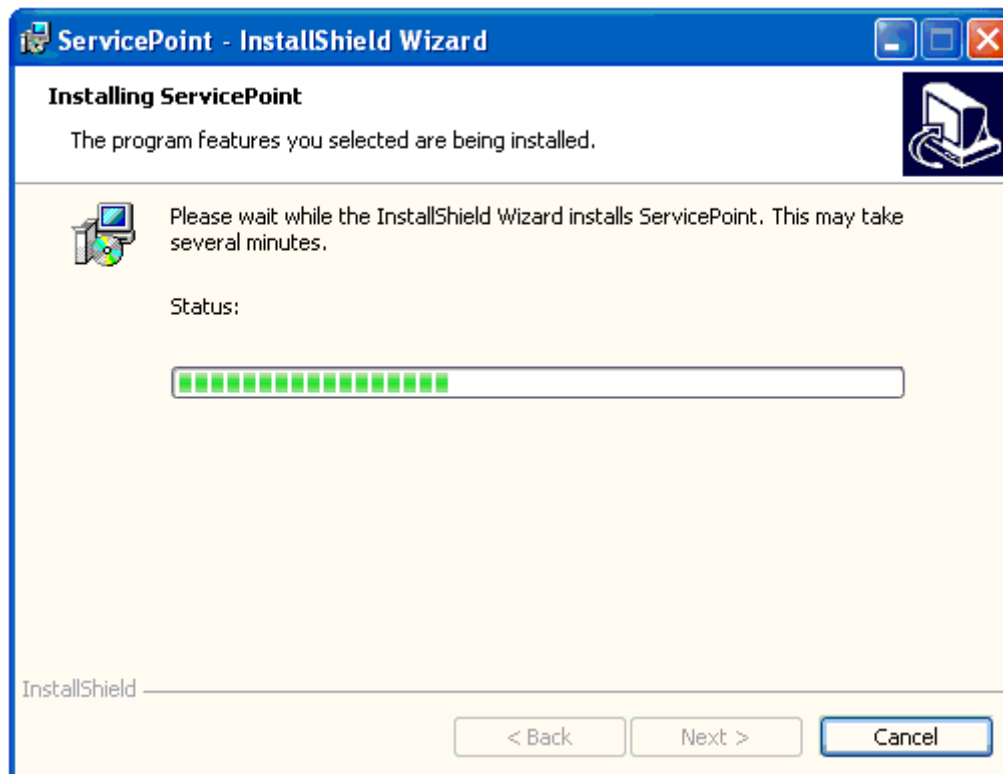
The following screen will appear for both the Server, and the Workstation Client versions of the install. The default value of setup type is “Typical”. This setup type will install the ServicePoint program files, and the ServicePoint reports for the Server version of the install. For the Workstation Client version of the install, the workstation client files, the database installation utility, and the registration utility will be installed. The DB Installation utility is used to setup a new ServicePoint SQL database, as well as allowing installation of ServicePoint Demonstration data. At least one workstation must have the DB Installation utility installed in order to properly set up the ServicePoint SQL database. If you want to exclude the installation of the Utilities, select the “Minimal” install, or select “Custom” and indicate your preference. After selecting an option, click the “Next” button to continue.



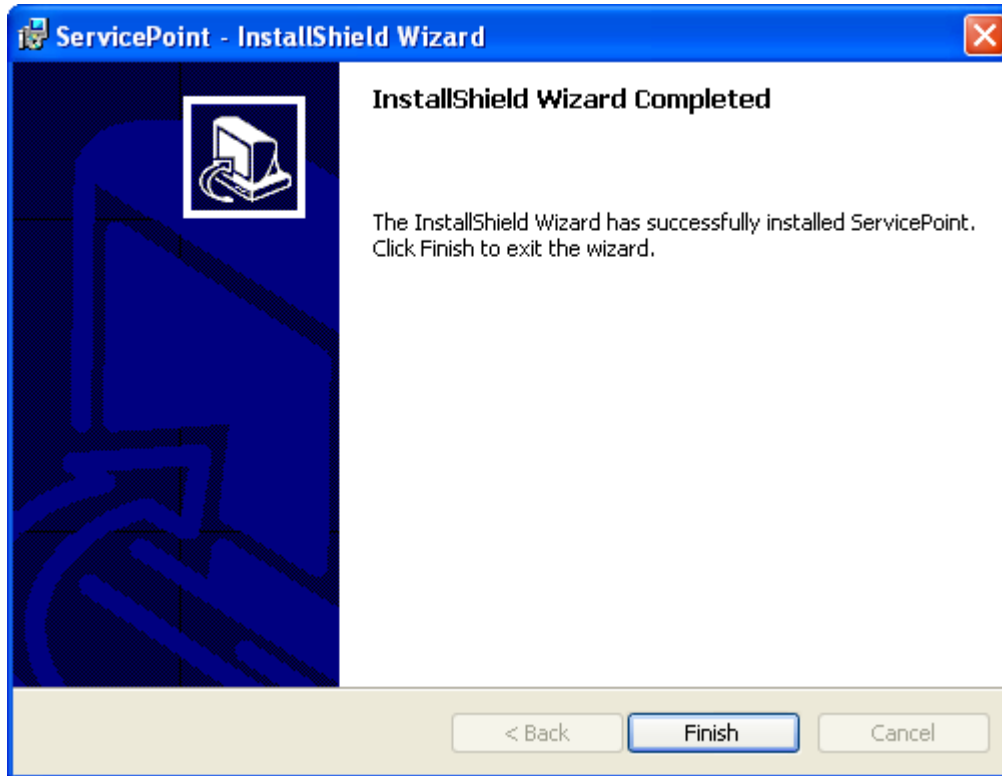
The summary screen will appear, displaying the selections for installation. Review to make sure these are the settings you chose in the previous installation steps. If these need to be adjusted, click the Back button and make the changes. Once the settings are as you desire, click the Install button.



The install status window will appear. The various steps of the installation will be displayed as they are being performed. This will take a few minutes.



Once the software has been installed, the window below will appear. Click the Finish button to close the window and return to your desktop.



Again, the workstation client setup should be done on each computer that will be running ServicePoint. The first time the client ServicePoint application is run from a workstation, you will be asked to browse to the ServicePoint server directory. Use the browse window that appears to locate the ServicePoint executable file in the server install. This location will then be stored for future use.

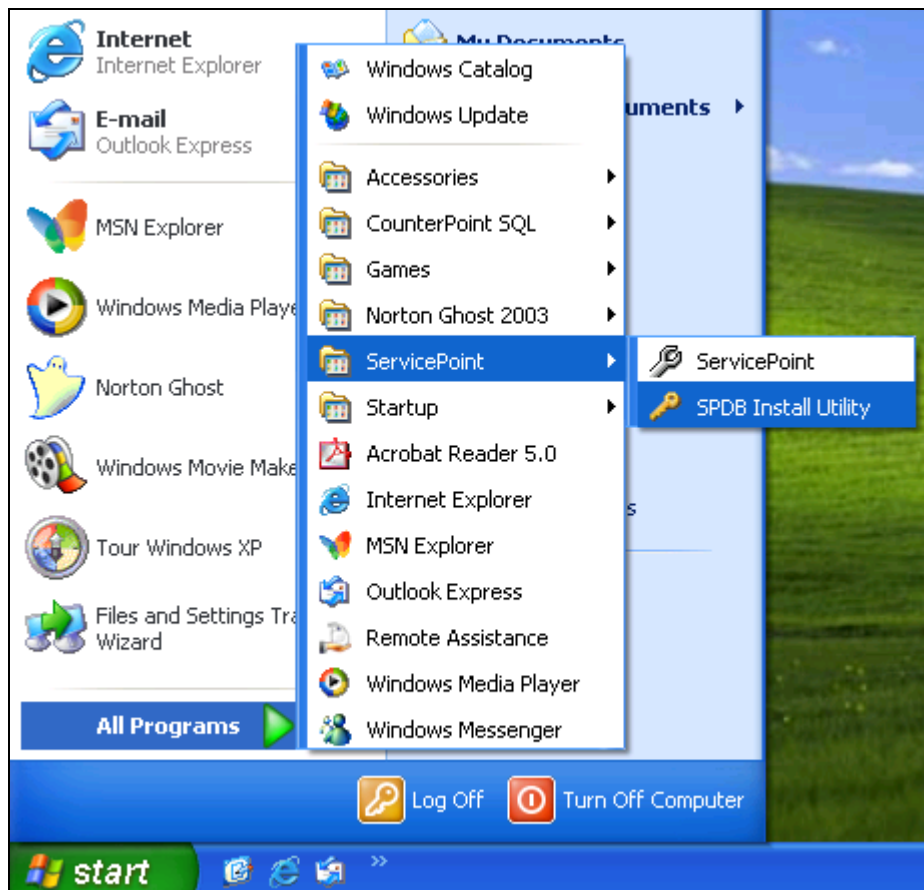
Database Initialization and demonstration data install

Before running ServicePoint for the first time, the ServicePoint database needs to be defined to MS SQL Server. Additionally, the ServicePoint SQL database utility will allow installation of demonstration data, if desired.

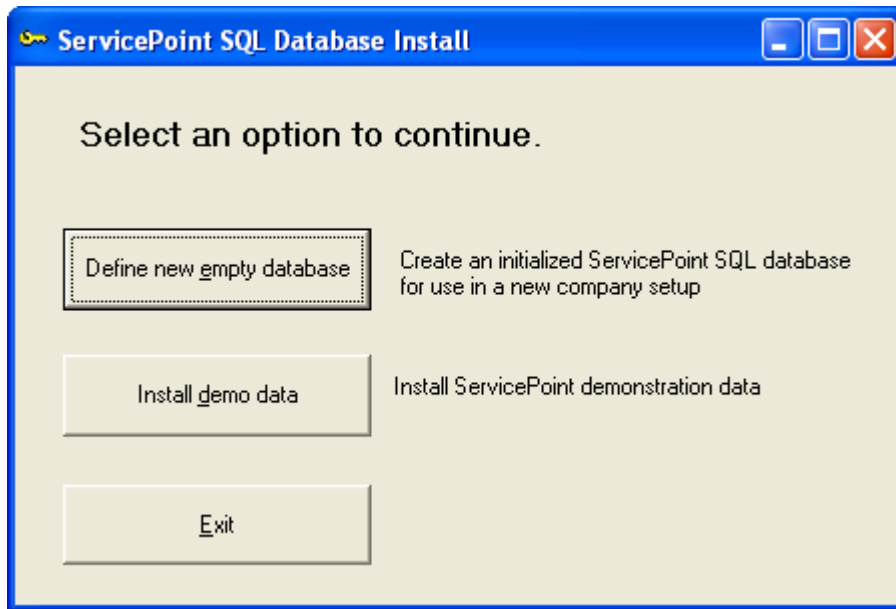
To define a database for ServicePoint, you must first have defined a company database for use in CounterPoint SQL, or Great Plains. This can be a company defined in your accounting specifically for use or testing with ServicePoint, or an existing company within the accounting package (including demodata or starter data). Please refer to your accounting software documentation for instructions on defining companies for your chosen platform. Once a demo company exists for use within CP SQL or Great Plains, proceed with the steps below to create a ServicePoint SQL database.

Empty Database Initialization

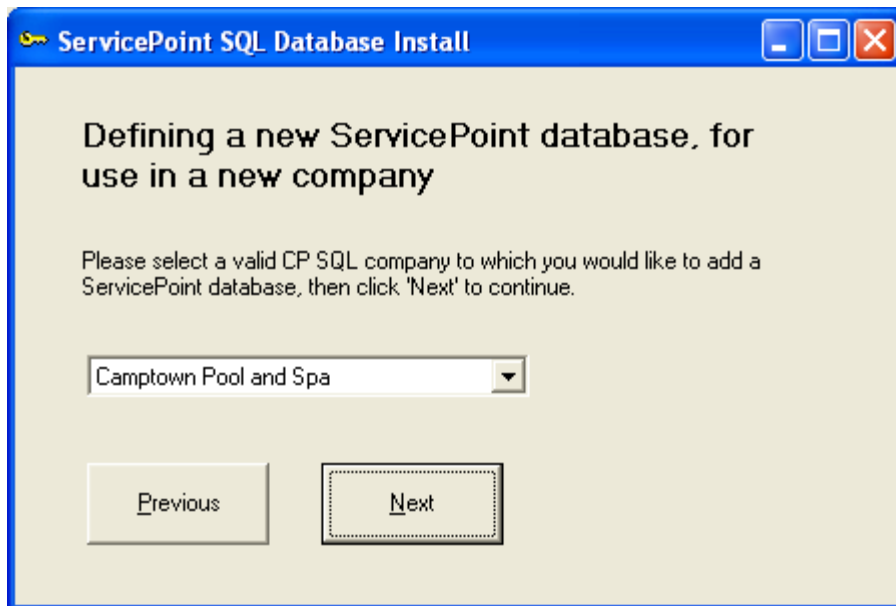
From the server install of ServicePoint that has had the ServicePoint Database Initialization utility installed, start the program by executing *SPDP Install Utility*, found under Start/Programs/ServicePoint. Alternatively, the utility may be started from a workstation by browsing to the server install of ServicePoint, and executing the application *DataInstall.exe*.



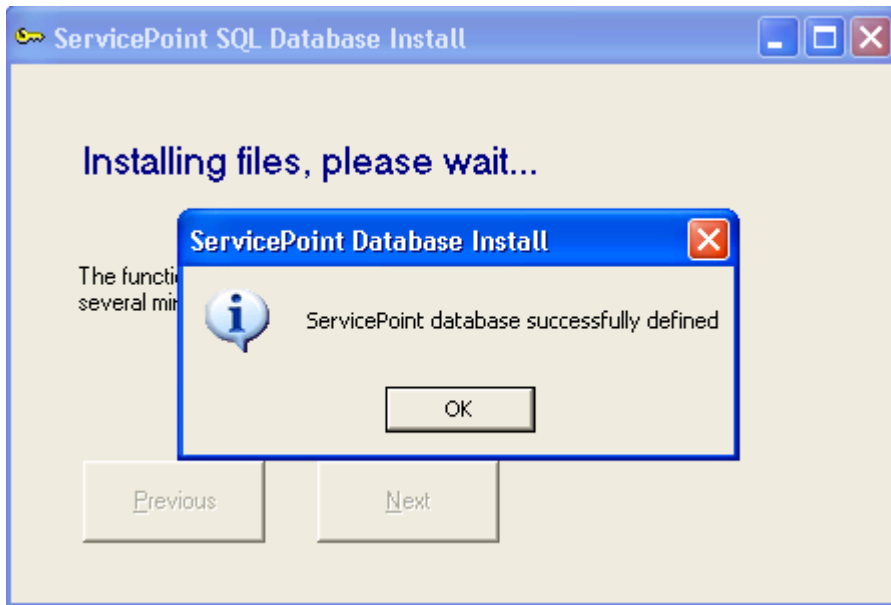
The following menu of options will appear when the program is invoked. Select “Define new empty database”.



The screen below will be displayed. Use the pulldown list to select the desired accounting company for which a ServicePoint database should be defined. After selecting the correct company, click “Next”.



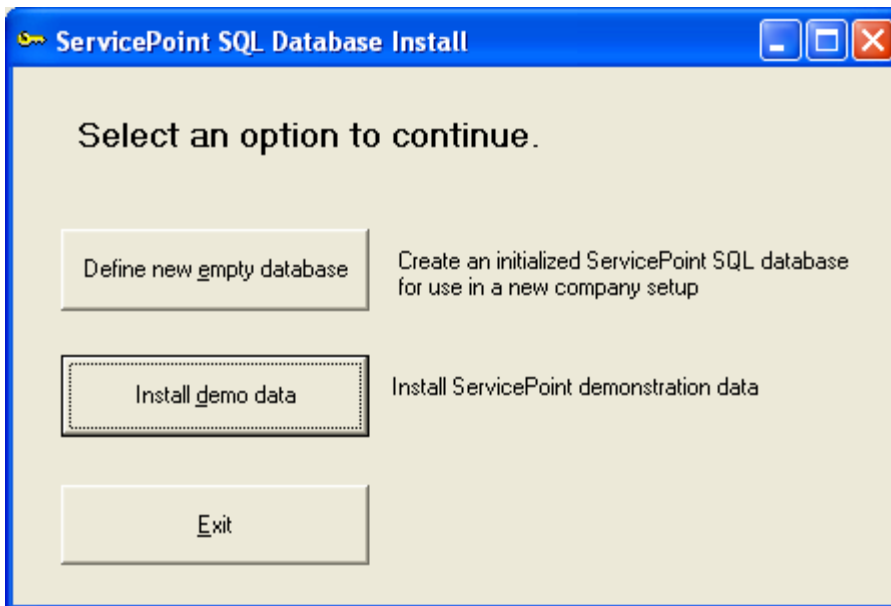
Database definition should only take a short time. The following message will be displayed upon successful completion. Click “OK” to clear the message.



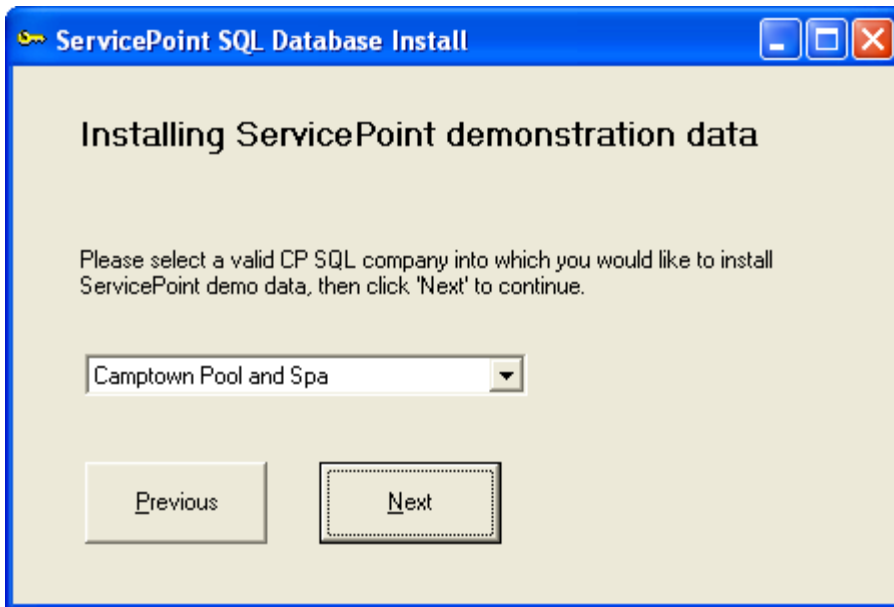
Click “Finish” and the menu of data options will be redisplayed. If you are initializing an empty ServicePoint SQL database only, you may click “Exit” to exit the utility. If you wish to install demonstration data into your newly defined ServicePoint database, proceed with the following steps.

Demonstration Data Installation

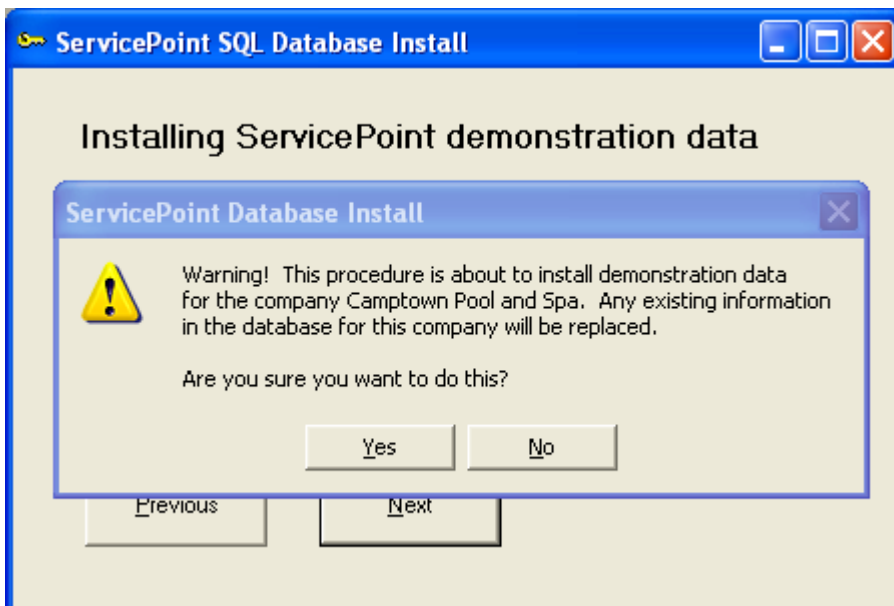
From the menu of options, select “Install demo data”.



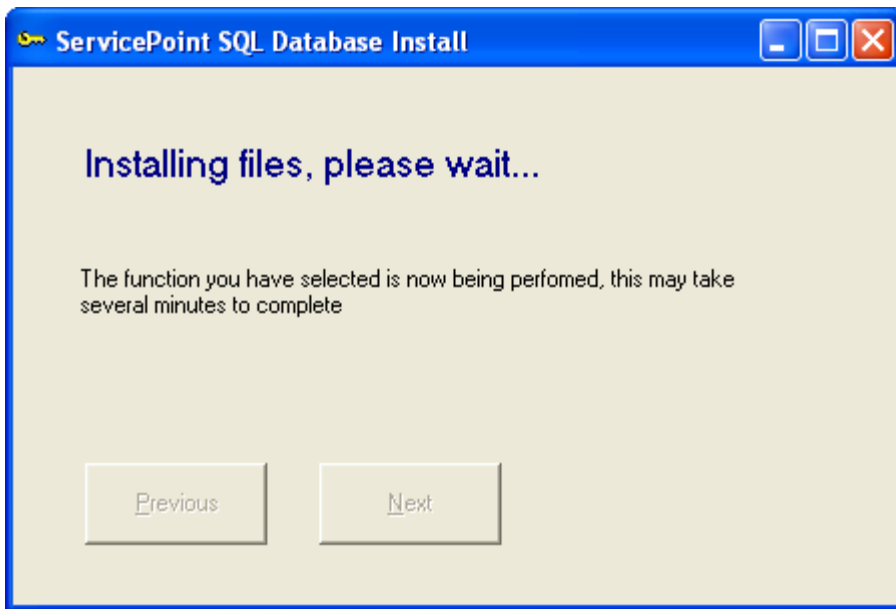
The screen below will be displayed. Use the pulldown list to select the desired accounting company for which ServicePoint demonstration data should be installed. The company selected must have already had the ServicePoint empty database defined, as described above. After selecting the correct company, click “Next”.



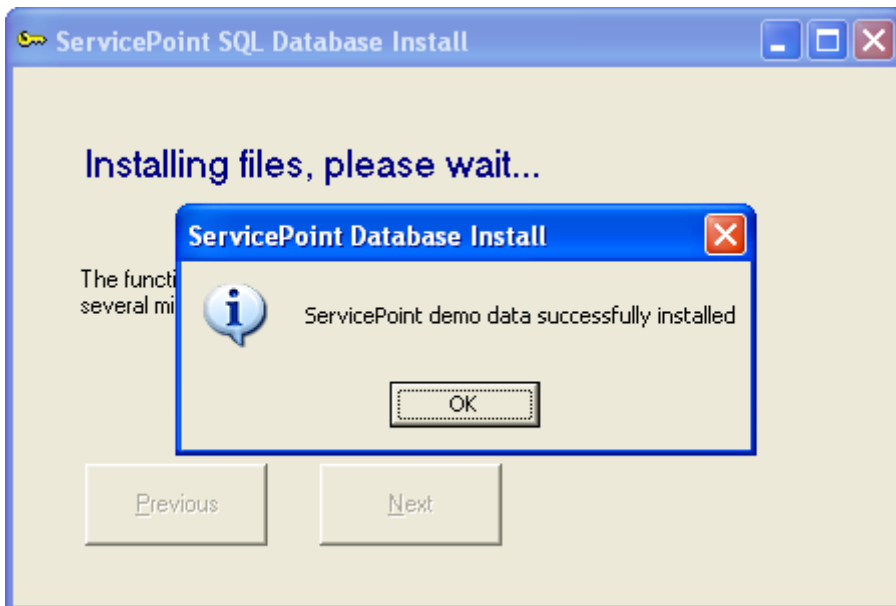
The following warning will be displayed. It is important to note that the installation of ServicePoint demonstration data into a company will overwrite both the existing database for ServicePoint, and the associated accounting company. Any existing data in these companies will be overwritten. To proceed, click “Yes”. Click “No” to abort installation.



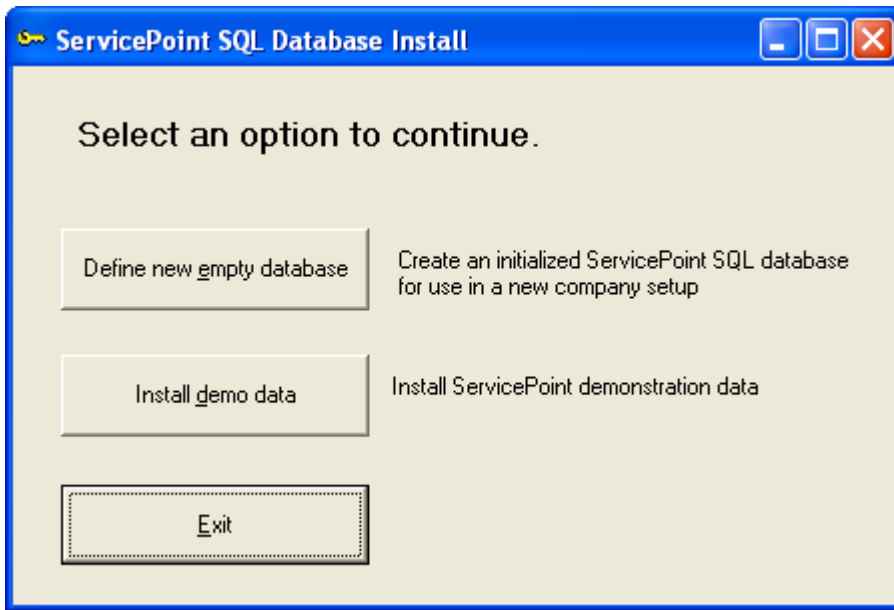
While the demonstration data is being installed, the screen below is displayed. Demonstration data installation will take a few minutes. Do not abort installation, as damage to the database structure may result.



After demonstration data installation is completed, the following message is displayed. Click "OK" to clear the message, and then click "Finish" and the menu of data options will be redisplayed.



Click “Exit” to end the utility.



Running ServicePoint

After defining the ServicePoint database, you may now run the application by either double-clicking the ServicePoint icon on the desktop, or executing ServicePoint under Start/Programs/ServicePoint.