Client Data System®

Installation Guide

Version 4.3 (Single User)

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Introduction

E-Z Data, Inc.'s Client Data System® (CDS) is a modular front office system designed to increase the marketing, sales, and customer servicing capabilities of insurance agents, investment advisors, and the companies they represent. This document contains instructions for installing CDS version 4.3.

E-Z Data employs the most resourceful tools available to achieve CDS's high performance. The program uses the most powerful and effective development language (Microsoft Visual C++) as well as the most robust database management system available—Sybase Adaptive Server Anywhere 7.0.

More than fifteen years of leadership in client management software has resulted in innovative functionality that cannot be found in other programs. The unique SmartPad™, Letter Log, Sets, and valuable Dynamic Reports are industry-specific tools that will increase the effectiveness of your office. CDS makes accessing information, entering data and navigating through the system smooth and efficient. For more information on the system, please visit the E-Z Data, Inc. Web site, www.ez-data.com.

Hardware and Software Requirements

The following list details the minimum and recommended hardware and software requirements for Client Data System, version 4.3:

- **266 MHz Pentium-class processor** (500 MHz or higher recommended)

- **64 MB of RAM** (256 MB or higher recommended)

- **500 MB of free hard disk drive space** for initial installation (1 GB recommended). In addition, plan to maintain additional free hard disk space of approximately four times the size of the CDSWIN directory, including all subdirectories, for program upgrades and database rebuilds. This additional space is still required on the C: drive even if the CDSWIN directory is maintained on a different drive.

- **Microsoft® Windows®** 98, 2000, XP, or 2003 Server operating system (XP or later strongly recommended)

- **Microsoft® Word 97**, or a later version, is required to use Word as the default word processor in CDS. Earlier versions of Word can be used independently of CDS on the same computer. Microsoft® Word 2003 or later is recommended.

- **Microsoft® Outlook 2000 or Lotus Notes R6**, or a later version, is required to use the e-mail synchronization modules. Please note that the program does not support Microsoft® Outlook Express.

- **E-Z Mobile** for use with a PDA. Please note that E-Z Conduit is **not supported** by CDS v4.3.

Before the Installation

Norton AntiVirus Users: Disable Norton AntiVirus Auto-Protect before installing CDS. Note that Windows 2000/XP users will need administrative rights to perform this action.

1. From the desktop, select **Start**, **Programs**, **Norton AntiVirus**, and then click **Norton AntiVirus**.

2. Select **Options** and then click the **Auto-Protect** tab.

3. Clear the checkmark next to the **Load Auto-Protect at Startup** option and then click the **OK** button.

4. Click the **Yes** button when prompted to unload Auto-Protect.

5. Exit Norton AntiVirus.

Installation

Note for Portable Computers Only: When installing CDS on a portable computer with an interchangeable diskette drive and CD-ROM drive, copy the Control file from the diskette to drive C before beginning installation. During the CDS installation from the CD-ROM, a prompt will ask for the Control file diskette. Change the location of the file from A:\ to C:\ on the prompt dialog box before proceeding.

1. Close all programs that are running on the computer, including CDS and any open MobiLink connections.

2. Insert the CDS v4.3 CD into the CD-ROM drive.

3. If the InstallShield Wizard opens, skip ahead to Step 8. If not, continue as follows:

4. From the Taskbar, click **Start** and then click **Run** to open the Run dialog box.

5. Click the **Browse** button and then select the CD-ROM drive from the drop-down list of the **Look in:** field in the Browse dialog box.

6. Double-click the **Setup.exe** file from the list to return to the Run dialog box.

7. Click the **OK** button in the Run dialog box to open the InstallShield Wizard.

8. When the InstallShield Wizard opens, click the **Next** button to start the Setup program.

9. When prompted, review the Software License Agreement. If the terms are acceptable, click the **Yes** button to continue.

10. From the Setup Option window, select the **Single User** button to install the stand-alone version of Client Data System. If you are installing a Network version, please refer to the appropriate documentation for a Network installation.

    Note: If the Adaptive Server Anywhere 7.0 has already been installed, Steps 11-13 will be omitted.

11. A message box will indicate that Adaptive Server Anywhere 7.0 needs to be installed before running the CDS installation. Click the **Yes** button to continue.

12. Click the **Next** button to accept the default directories where the Adaptive Server Anywhere 7.0 components will be installed. There will be a slight pause at the end of this installation when the installation window will close briefly.

13. When the installation is complete, click the **Finish** button to resume the CDS installation.

14. In the Setup Type dialog box, use **Typical** for the type of Setup. The Compact or Custom setups are not recommended for Single User installations.

15. In the Select Program Folder dialog box, click the **Next** button to accept the default Program Folder (Client Data System).

16. In the Start Copying Files dialog box, review the list of Current Settings. If a change is required, click the **Back** button. Otherwise, click the **Next** button to begin. A progress bar will track the status of the files being copied.

17. When the progress is near completion, a prompt to insert the Control File diskette into drive A opens. Insert the diskette (or type C:\ in the dialog box if the file was copied to the hard disk) and then click the **OK** button to continue with the installation. A folder containing the new icons may open and obscure the dialog box. If this occurs, minimize the open folder to display the dialog box to continue.

18. The installation program will prompt you to install Microsoft Outlook Synchronization. Ensure that Microsoft® Outlook is closed prior to beginning this installation. Then, click the **Yes** button to begin the installation. When the installation is complete, click the **Finish** button to close the Synchronization installation.

19. Earlier versions of Windows may produce a Restarting Windows dialog box. If this occurs, remove the floppy disk from drive A and select the **Yes, I want to restart my computer now** option.

20. When the InstallShield Wizard Complete dialog box appears, click the **Finish** button to exit.

After the Installation

Norton AntiVirus Users: Re-enable Auto-Protect as explained below.

1. From the desktop, select **Start**, **Programs**, **Norton AntiVirus**, and then click **Norton AntiVirus**.

2. Select **Options** and then click the **Auto-Protect** tab.

3. Check the **Load Auto-Protect at Startup** option and then click the **OK** button.

4. Click the **Yes** button when prompted to load Auto-Protect.

5. Exit Norton AntiVirus.

The installation process is now complete. See the *Using CDS for the First Time* section for information on using this software.

Using CDS for the First Time

Before using CDS for the first time, please read the ***Getting Started with the Client Data System*** user guide to learn the basic operation of the program. This guide provides invaluable information on reaping the full benefits of the application. The following section provides a brief overview of operations and is included as a quick-start reference.

Creating Databases

During installation, demonstration data and users are created in the Demonstration (DEMO) database. New users should log in to this database as the demonstration user to create agency databases and users for their company.

Create a Database

1. From the Taskbar, click **Start**, point to **Programs**, **Client Data System**, and then select **CDS for Windows**.

2. In the Login dialog box, select the Database **DEMO** and the User Name **DEMO**. Click the **OK** button to log in to CDS (no password is required for DEMO).

3. From the CDS desktop, click **Database** and then select **Create New Database**. Click the **OK** button on the Simultaneous Database Creation warning dialog box.

4. In the Create Database dialog box, enter a name for the database. After entering the name, press the **TAB** key to move the cursor to the Drive/Path field. CDS populates this field automatically. Press the **TAB** key again to move the cursor to the User Name field. Type a user name into the User Name field and then click the **OK** button.
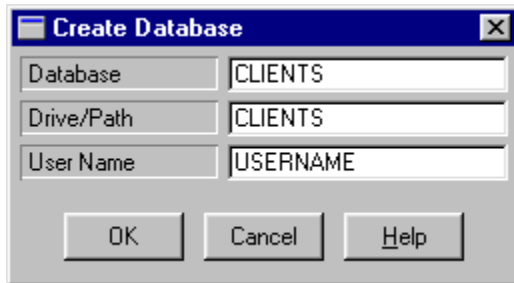
    Example: The Drive/Path location is a subdirectory of the CDSWIN directory. The CLIENTS database will be created in a subdirectory of CDSWIN named CLIENTS. Each created database is located in a subdirectory of the same name as the database. Do not enter path information (e.g., C:\Program Files\CDSWin\Clients) in the Drive/Path field.

5. Once the database is successfully created, a dialog box opens to confirm that the creation was successful. Click the **OK** button to log in to the new database.

6. Repeat Steps 3 and 4 of this section to create additional databases.

See the CDS Help topic *Getting Started in CDS* for additional information.