



Client Data System®

Single User Installation Guide



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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 6.0.

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 9.0.

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 6.0:

- **750 MHz Pentium III processor** (2 GHz or higher recommended)
- **128 MB of RAM** (256 MB or higher recommended)
- **300 MB of free hard disk space.** Workstations that are used for database maintenance procedures should have three times the size of the largest CDS database as free hard disk space on the drive.
- **Microsoft® Windows® XP** or Server 2003 operating system
- **Microsoft® Word 2000**, or a later version, is required to use Word as the default word processor in CDS
- **Microsoft® Outlook 2003** or **Lotus Notes R6**, or a later version, is required for Calendar and E-mail Posting synchronization with CDS
- Please note that **CDS v6.0 does not support E-Z Conduit**

Before the Installation

Norton AntiVirus Users: Disable Norton AntiVirus Auto-Protect before installing CDS. Note that 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. Locate the folder containing the CDS v6.0 Installation files. From this folder, double-click the **Setup.exe** file.
3. After reading the Welcome message, click the **Next** button to continue.
4. When prompted, review the Software License Agreement. If the terms are acceptable, click the **Yes** button to continue.
5. 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 9.0 has not already been installed it will install automatically.

6. In the Choose Client Data System Directory dialog box, click the **Next** button to accept the default Destination Directory (C:\CDSWin).
 7. In the Start Copying Files dialog box, after reviewing the Current Settings, click **Next** to continue.
 8. The installation program will prompt you to install Microsoft Outlook Synchronization. There are two separate components:
 - The Outlook Posting component enables the user to post Outlook E-mail into CDS.
 - The Outlook Calendar/Contact Synchronization Component enables the user to copy contacts and activities between CDS and Outlook.
- If you want to install either of these components, ensure that Microsoft® Outlook is closed prior to beginning this installation. Then, select the checkbox for the component(s) you want and click the **Next** button to begin the installation.
9. When the InstallShield Wizard Complete dialog box displays, 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

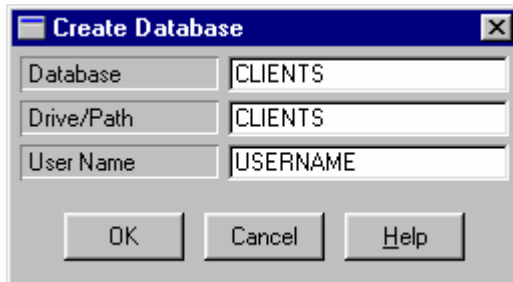
Before using CDS for the first time, please read the *Getting Started with the Client Data System User Guide* to learn the basic operation of the program. This guide provides invaluable information on reaping the full benefits of the application. The following section provides a brief overview of operations 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 **Client Data System**.
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.