

Team Management Systems
ACOWIN
Software Solution

Installation and Startup Guide
Revision 05.01.16

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Welcome to Acowin!

This installation and start-up guide will take you through installing your Acowin software, connecting your workstations, entering your official Acowin license code, and completing some basic accounting and company setup. We're going to assume that you already have your computers networked together through Microsoft Windows, and your

printers are already properly installed. This Installation and Startup Guide will tell you everything you need to know in order to get Acowin up and running. Please be sure to review these pages carefully before you begin software installation. If you have any questions about the topics covered in this booklet, or you encounter any difficulties during software installation, please contact Team Management Systems Support for assistance:

Team Management Systems

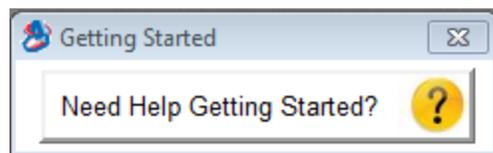
11928 Fairway Lakes Drive
Ft. Myers, Florida 33913
Phone: (239) 437-9411
Fax: (239) 437-9088
On the Web: www.acowin.com
E-mail: support@acowin.com

Please check out our Help and Tutorials!

This booklet is only one of the helpful resources available to you. Acowin has an extensive Help system, which you can reach with any of the yellow question mark buttons you'll see on almost every screen. The Introduction to Acowin Help chapters would be a great place to start learning about the program; they'll teach you about the mouse, the toolbar buttons, and other basics. Also, there is a complete set of **multi-media tutorials** online. A shortcut to the Tutorials is placed on your desktop automatically when you install Acowin on your computer, or you can find them by going to the ACOWIN website (www.acowin.com) and clicking on the Tutorials link.



The tutorials use animation and voice narration to cover many aspects of the system, from getting logged in and taking your first service call, to applying payments and exporting data to your accounting software. The tutorial programs are self-contained, so you can view them on any computer. Each tutorial ranges in time from approximately 2 minutes to 7 minutes (some are longer, but the majority are short), and are a wealth of information. There is also a link at the top of the ACOWIN main menu screen that will take you to a tutorial screen that has the minimum tutorials you should watch when you first start using ACOWIN.



Before You Begin...

Here are some basics to keep in mind before you begin software installation.



- ▶ This software was designed for the Microsoft Windows Vista, Windows Server 2003, Server 2008, Server 2012, Windows 7, 8 & 10 32-bit and 64-bit operating systems. Running ACOWIN under any other operating system is not recommended by Team Management Systems.

- ▶ **It is important** to make certain you log in as a Windows **administrator** when you install Acowin. Only an administrator can install new programs correctly – other user accounts may not be allowed to do so. Any user name *could* be given administrative privileges; if you're the only person who ever uses your computer, it's quite possible that your normal login name is designated as an administrator. Check with your Windows system consultants, or take a look at the User Accounts tools in your Windows Control Panel, if you're not sure you have administrator access.

- ▶ The minimum **workstation** hardware configuration is a Pentium P4 with 1 GB of RAM and 1 GB of free hard drive space. Every workstation should meet these minimum requirements.

- ▶ The **minimum server configuration** is a Pentium P4 with 2 GB of RAM (depending on the operating system you are using, 4GB or more of RAM is better). Windows 2003 servers should have at least 2 gigabyte of RAM to run smoothly. A Windows Vista, Server 2008, Server 2012, Windows 7, Windows 8 or Windows 10 server should have at least 4 gigabytes of RAM. Extra RAM can be very helpful on the server, since it will most likely be running Acowin and QuickBooks, and supplying information to the workstations. **Important note about Windows HOME Editions:** The Home editions of Windows are NOT suitable for use on the server, if your network has more than 2 workstations. The Home editions of Windows are severely limited in the number of network computers they will support. It's acceptable to have Windows Home editions on the workstations, but if you have more than 2 workstations, the server **MUST** be running Pro, Business, Ultimate, or Server editions of Windows.

- ▶ Your Windows display must be configured to at least 1024x768 pixels, with a minimum color depth of 256 colors. To confirm or adjust these settings, click on your Start button, then choose Settings/Control Panel/Display. The display information will be accessible from there.

- ▶ If you have a trial copy of ACOWIN, you'll have 30 days to evaluate it and make a purchasing decision. During the evaluation period, you will only be able to run the program on a single computer, designated as a server. You cannot connect any workstations to an evaluation copy of the program. Upon purchase of the ACOWIN system, you'll be given a validation code to register the software,

so that it can be used beyond the 30-day trial period. You may also purchase workstation licenses to allow access to the same program from other computers on your network. The entire procedure for licensing the server and workstations is described in this guide, so if you've already purchased the full version of ACOWIN and some workstation licenses, just follow these instructions. If you're working with a demo copy and are ready to purchase, please contact Team Management Systems at (800) 299-7351.

▶ Before you can install any ACOWIN **workstations**, you must have an operational Windows network. This consists of at least two Windows personal computers, connected using network cards and a hub or switch. The computers must be able to "see" each other across the network. This guide presumes that you have a Windows network up and running already. For the purposes of the ACOWIN software, your network will be divided into a **server** where all the data resides (typically the most powerful computer available to you and the one that has QuickBooks Server loaded on it if you are integrating with QuickBooks) and a number of **workstations** that access the information. The server could be a "dedicated" machine, meaning nobody uses it for anything other than storing data, or it could be someone's desktop computer that you have selected to be the server because it's fast and has a big hard drive.

▶ Regular backups are very important to safeguard your data. If your network doesn't already have an external backup system, you **need to set one up**. See the last section of this guide for a discussion of the various backup options available.

Installation and Setup Checklist

Here is a basic checklist that covers the overall process of installing and configuring the Acowin program. Each of the steps in this checklist is covered in greater detail in the following pages.

- ❑ Install Acowin on the computer that will be your Acowin server.
- ❑ Install Acowin on your workstations and connect them to the Acowin server.
- ❑ Run the Setup Wizard to create your "live" company *(if you're ready to begin entering live data)*.
- ❑ Run the QB Wizards to connect Acowin to QuickBooks *(QuickBooks users only)*.
- ❑ Watch the animated Acowin tutorials to learn how to use the system.

Installing the Acowin Software On Your Server

Your first step will be to select one of your computers to be the **server**, where all your data will reside. The Acowin License Manager program will be installed on this computer. Only one computer on your network can be installed as a server; the rest will be *workstations*.

Important Note for QuickBooks Users: The Acowin server will directly integrate with QuickBooks if you're using the QuickBooks Pro, Contractor, Enterprise, or Accountant editions, version 2003 or higher. This means QuickBooks **must** be installed on the Acowin server computer.

- Be sure to close any programs running on your server prior to installing ACOWIN, as you will need to reboot the server during the install
- Insert the ACOWIN CD into the server's CD-ROM drive. The installation program should run automatically. If it doesn't, you can open the My Computer icon, then double-click the CD-ROM drive. Locate the file called **launch.exe** on the CD and double-click it to run the install program.
- Select the "Install" option (which may say "Install and Update").
- You can click the Next button to accept all the defaults during the installation process. Be sure to indicate that you accept the license agreement when prompted!
- The program will ask if you want to install a 30 Day Trial, Server Installation or a Workstation Installation. Choose **Server Installation** and click Next. If you are installing a 30 day demo, choose the 30 Day Trial option.
- Continue clicking Next and then "Install". After it is finished, you will be prompted to click the "Finish" button.
- Reboot the computer when prompted. NOTE – it is very important that you reboot the computer when prompted in order to complete the installation.
- After the reboot, you will be prompted if you want to "Print workstation instructions" or "Continue without printing workstation instructions". Choose the appropriate option and then click "Continue".
- You will now be prompted to install the "Crystal Runtime". Click the "Next" button to continue.
- Accept the Crystal Run Time (SAP Business Objects) license agreement and click "Next" when prompted. After Crystal is finished installing, click the "Finish" button.

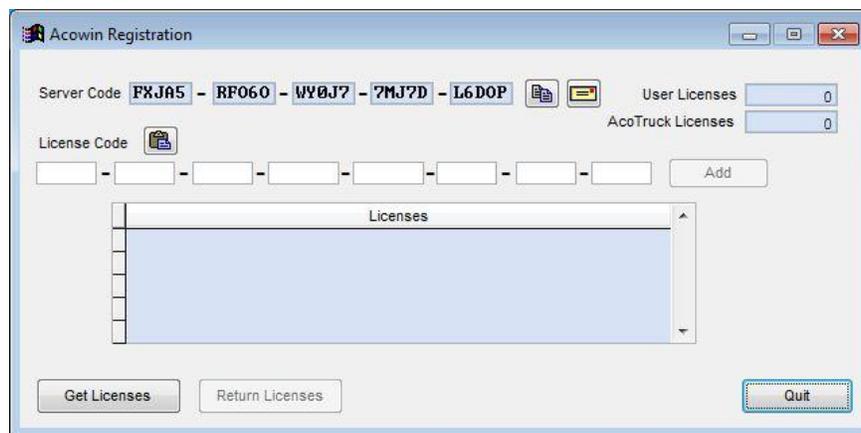


- You will now have a new ACOWIN icon on your desktop (along with several other ACOWIN related icons). Double-click this icon to run the program for the first time. You will be asked to enter your CD key, which will be printed on the back of the Acowin CD Box, or included in the e-mail you were sent when you downloaded Acowin.



- The program will notify you that you're in demo mode, and have 30 days to register. If you're ready to register the full program, click the "Yes" button. The computer will display the Registration screen. Click the "Get Licenses" button and the system will contact TMS and download your licenses. If you are running ACOWIN as a 30 day demo, then do not click the "Yes" button to register the program and skip to the section called **"The ACOWIN Toolbar"**

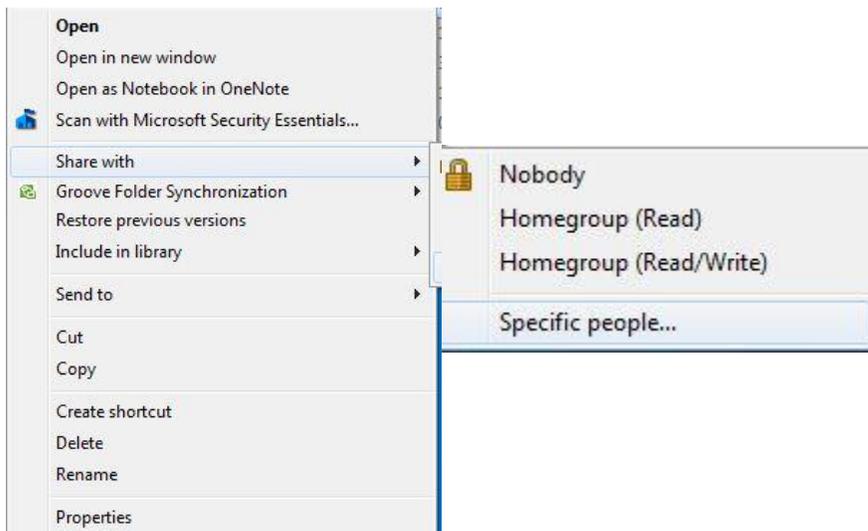
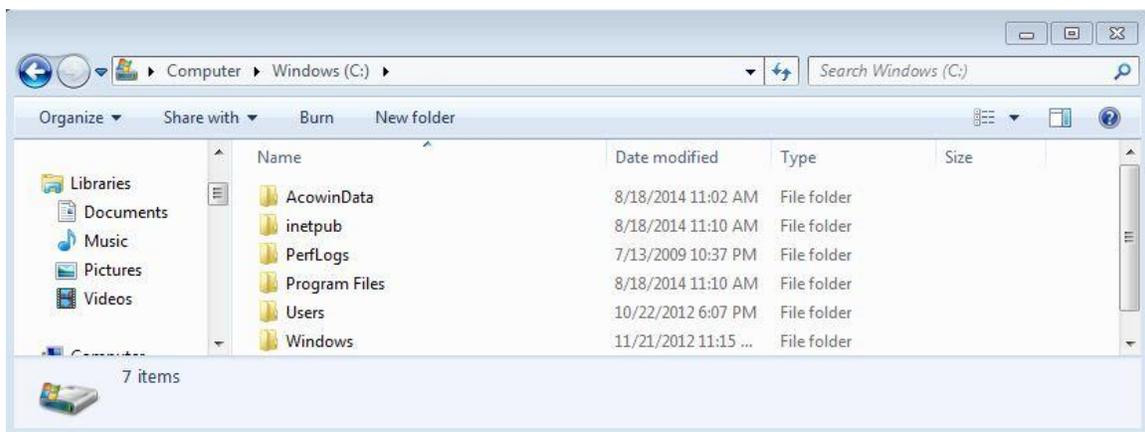
If you are using the demo version of Acowin, you can skip to the section of the Installation Guide called **"The Acowin Toolbar"**.

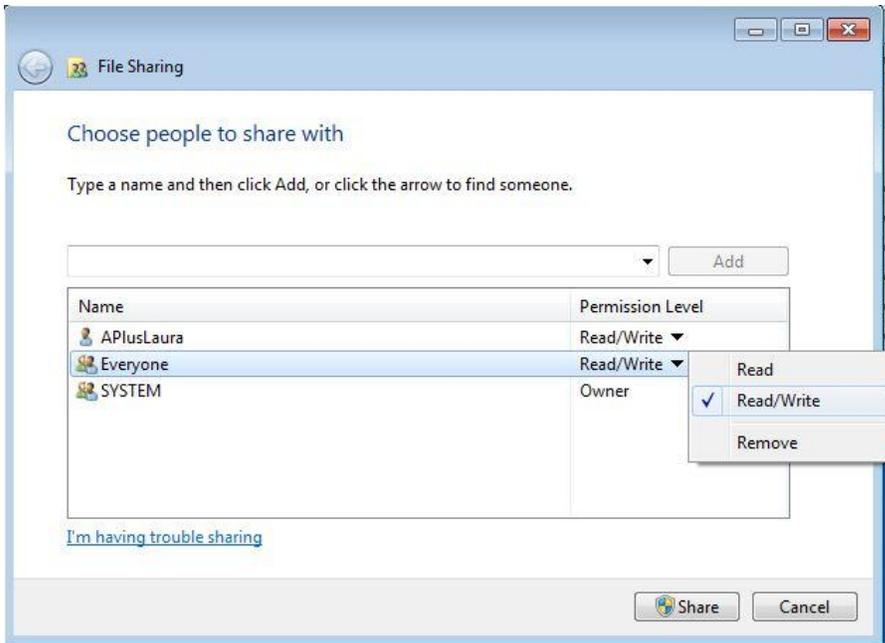


- After you have downloaded your licenses, click OK and then quit out of the registration screen.

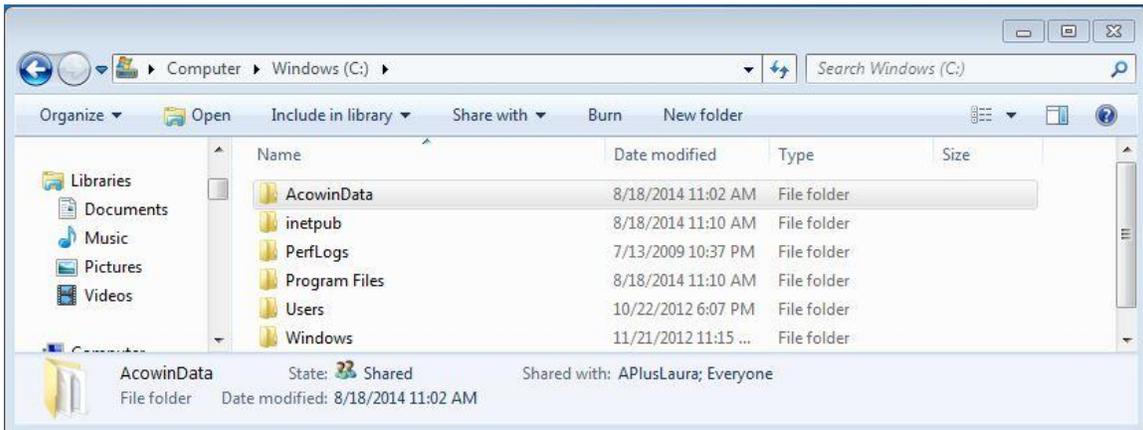
NOTE – You must have internet access from your ACOWIN server. If not, skip to the section titled: **"Licensing a Former Demo Version of ACOWIN or Manually entering Acowin License Codes"**.

- In order for the workstations to access ACOWIN's data, you must **share** the \Acowin\Data folder on the server's hard drive. Sharing a drive or folder makes it available to other users across the network. To share the ACOWIN Data folder, open the My Computer icon (or Computer icon depending on the version of Windows you are running), then *double-click* on drive C: (or whichever drive you installed ACOWIN to) and *right-click* the AcowinData folder and choose "Share with" and select "Specific People" and choose "Everyone" from the drop down list and click the Add button. Then click on the "Everyone" entry in the screen and select select "Read/Write" from the drop down and then click "Share". NOTE – These instructions show screen shots for Windows 7/8. Other versions may be slightly different, but similar.





- After you have shared the AcowinData folder, you can click on it and you will see at the bottom of the screen that the state is labeled as “Shared”.



The Acowin License Manager

The server will have two Acowin icons added to its desktop. One of them is the standard Acowin program icon, which allows someone to log in at the server and use the Acowin program. The other icon is called the Acowin License Manager. This program allows your workstations to connect to the server’s shared data across the network. For QuickBooks users, the Acowin License Manager program also makes Accounts Receivable information available to the Acowin workstations, without the workstations needing to have QuickBooks installed on them.



This is what the Acowin License Manager icon looks like.

If you plan to connect any workstations to your Acowin server, you **must** run the Acowin License Manager program. Workstations will not be able to log in if the Acowin License Manager program is not running.

When you launch the Acowin License Manager program, you'll see a simple window with a few buttons. It looks like this:



The **Connect to QB** button connects the server to QuickBooks. You must complete the QB Wizard and have QuickBooks running on the server before you can click this button. For now, you should run the Acowin License Manager program if you're going to set up any workstations, but don't worry about the Connect to QB button just yet. The QB Wizard process is described later in this Installation Guide.

The **Break from QB** button will light up if you have connected the Acowin License Manager program to QuickBooks. This allows you to disconnect from QuickBooks without closing the Acowin License Manager program, which comes in handy if you want to close QuickBooks for some reason, but still have people logged into Acowin.

The **Hide** button "hides" the Acowin License Manager program and turns it into a small icon in your System Tray (the area next to the clock on your desktop.) You can hide the Acowin License Manager program to keep it from cluttering your desktop. To restore the License Manager to its normal size, *right-click* on the

System Tray icon, which looks like this:  then click the **Restore** option. You can hide and un-hide the Acowin License Manager program at will – it does its job whether it is hidden or not.

The **Used Licenses** window shows how many Acowin users are currently logged into the system. This number cannot exceed the number of **Total Licenses** you have purchased. If you leave the Acowin License Manager program open on your desktop for a while, and people log in and out of the program, the number of Used Licenses on display might not be accurate, since the display “goes to sleep” after a while. If you think the number of Used Licenses is not accurate, click the blue Used Licenses hyper-link. This will refresh the number of licenses displayed, producing an accurate count. The Acowin License Manager window also tells you when the Acowin License Manager program was launched, and how many connection attempts have been made since it was launched.

Rules for Launching and Closing the Acowin License Manager:

- When using the fully-licensed version of Acowin, you must have the Acowin License Manager running before you can launch Acowin on **any** computer, server or workstation.
- Use of the Acowin License Manager program is **not** required, nor available, if you’re using the **demo** version of Acowin during your 30-day trial period.
- If you don’t use QuickBooks, you must launch the Acowin License Manager program, but you don’t have to use the Connect to QB button.
- When you use the Acowin License Manager on a day-to-day basis, if you are a QuickBooks user, you must launch QuickBooks and open the correct company before you can click the Connect to QB button. Every morning, when you begin work for the day, launch QuickBooks, then launch the License Manager, then click the Connect to QB button.
- You must disconnect the Acowin License Manager program from QuickBooks, with the Break from QB button, before you can close QuickBooks. (QuickBooks will tell you someone is logged into its data and refuse to let you exit from the program if the Acowin License Manager is still connected to it.)
- If you accidentally close the Acowin License Manager program while you’re logged into Acowin, it will be necessary to log out of Acowin on all computers. This will happen automatically within 15 seconds of the Acowin License Manager being closed, unless you log each workstation off manually first. A warning message will appear on all Acowin computers that a mandatory shutdown is in progress.

Licensing a Former Demo Version of ACOWIN or Manually entering Acowin License Codes

After the CD Code is entered, you’ll see a message telling you that you have 30 days to register. If you installed Acowin a while ago and have been using it in demo mode, you might have less than 30 days to go. The Acowin demo can perform all the functions of the full program, **except** for hosting workstations or

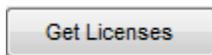
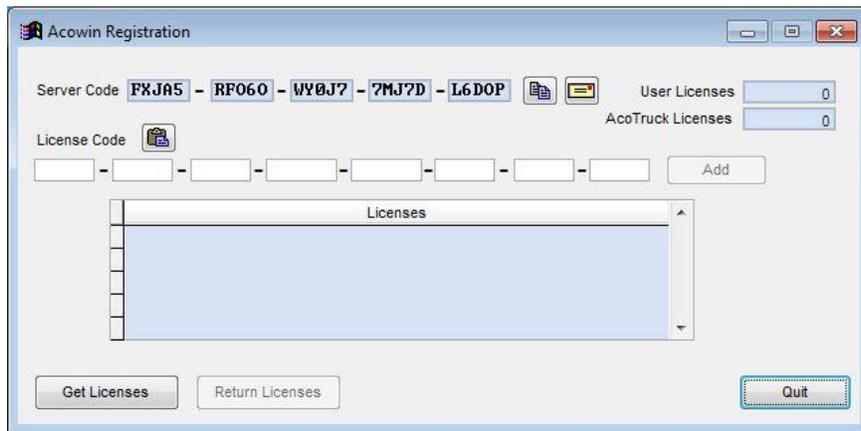
using ACOTRUCK. Only a fully-licensed copy of Acowin can support workstations and ACOTRUCK.

If you're ready to register, click Yes when the Acowin launch screen asks. You can also run the Acowin Register program later, from the Quick Launch menu. There should be a Quick Launch shortcut on your desktop, or you can click **Start / Programs / Acowin / Quick Launch**.



This is the Acowin Quick Launch desktop icon.

From the Quick Launch menu, choose **Register**. The main screen of the Acowin Register program looks like this:



If your server has access to the Internet, you can license your system by simply clicking the **Get Licenses** button. Your system will contact the TMS licensing server over the Internet, obtain you license codes, and enter them on the screen automatically.

NOTE - If you decide to move the Acowin server software to a different computer, the Return Licenses button will strip the license codes from your data, and prepare the TMS licensing server to generate new codes for the new computer, after you relocate your data. Clicking the Release License button will automatically open a document containing more detailed instructions. If you are going to perform a server move, be sure to print out the document that is generated and read the entire document first, and then perform the steps.

If your system is *not* able to access the TMS licensing server across the Internet, you will need to send your Server Code to TMS. There are some tools built into the Registration screen that will help you accomplish this.



The **Copy to Clipboard** button will copy the Server Code into the Windows clipboard. You can then switch to another Windows application, such as Microsoft Word or an e-mail message you are composing, and paste the code from the clipboard. The standard Windows command for pasting the contents of the clipboard is **Control + V**. This feature would be very helpful if you wanted to paste your Server Code into a word processing document, or if you were composing an e-mail message.



The **E-mail Server Code** button will automatically prepare an e-mail that contains the Server Code, addressed to Team Management Systems Support, using your default e-mail client (such as Microsoft Outlook.) This is generally the quickest and most convenient way to get your Server Code to TMS, but if you can't send e-mail directly from the Acowin server, or if you use a web-based e-mail service instead of a program like Outlook, you might need to use the Copy to Clipboard button instead.

Team Management will return a set of license codes, via fax or e-mail as you prefer. There could be more than one code for you to enter, depending on which optional features you purchased for Acowin, and how many users licenses you have. Enter each of the codes in the white **License Code** fields, then click the Add button when it lights up. Each code you enter will appear on the table at the bottom of the screen. In the screen shot above, three license codes have been entered.



The **Copy From Clipboard** button can help you enter your license codes, if you received them via e-mail. Use your mouse to highlight the license code in the e-mail from Team Management Systems, then copy it to the Windows clipboard with **Control + C**. Switch to the Acowin Register program and click the Copy From Clipboard button, located above the space where you would type in the new license code. The license code will be instantly pasted into the fields. (The program automatically deals with the hyphens that normally appear in the printed license code.) Click Add to add this license code to your system, then repeat the process if you have any other license codes to enter. This Copy From Clipboard feature is very handy for entering the long license codes easily, and with perfect accuracy.

When all of your license codes have been added to the system, exit from the Acowin Register program, and log back into Acowin. You should now be fully licensed, and will no longer see the message that says "you have XX days remaining." You can also connect any workstations you wish to add to your system, as described in the next section.

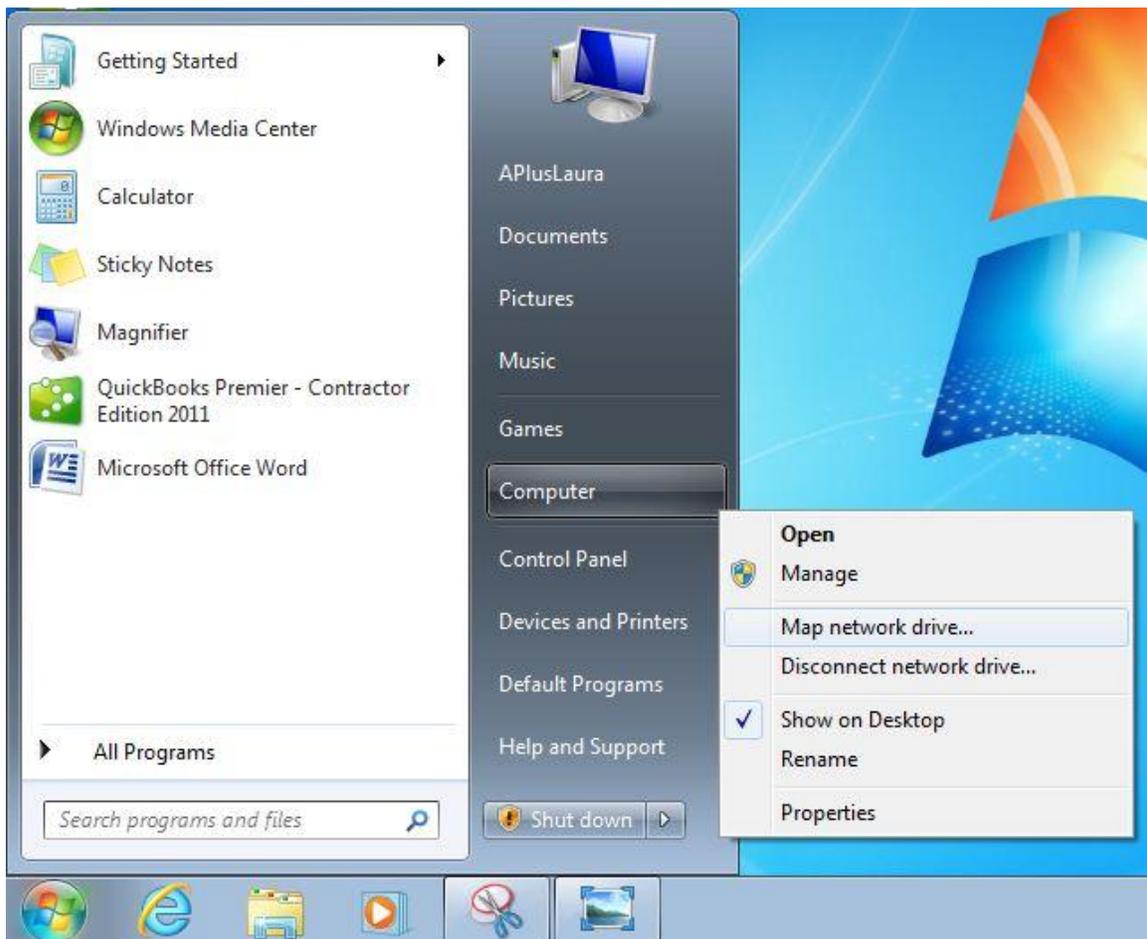
If you are not planning to install any Acowin workstations at this time, you can skip to the section of the Installation Guide called “**The Acowin Toolbar**”.

Installing Acowin Workstations

After you’ve got the server up and running, you can install the ACOWIN software on your workstations. Your software purchase will include a limited number of workstation licenses. Contact Team Management Systems if you need to add more workstations.

- Before you can install the ACOWIN software, each workstation must be *mapped* to the server’s hard disk. Mapping a shared directory creates a permanent link between it and the workstation. The screen shots below were taken using Windows 7. Other systems will be similar, check with your IT person if you need help mapping a network drive.

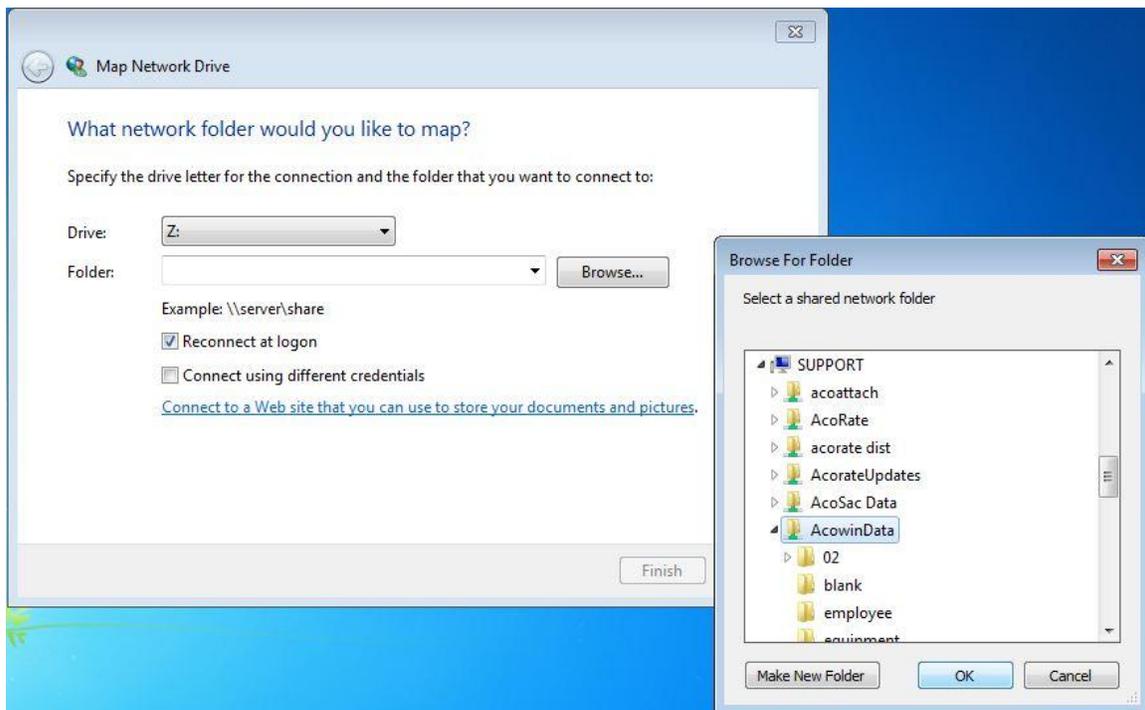
On the computer you want to be a workstation, click the Start Button and right click on the word Computer and select Map Network Drive.

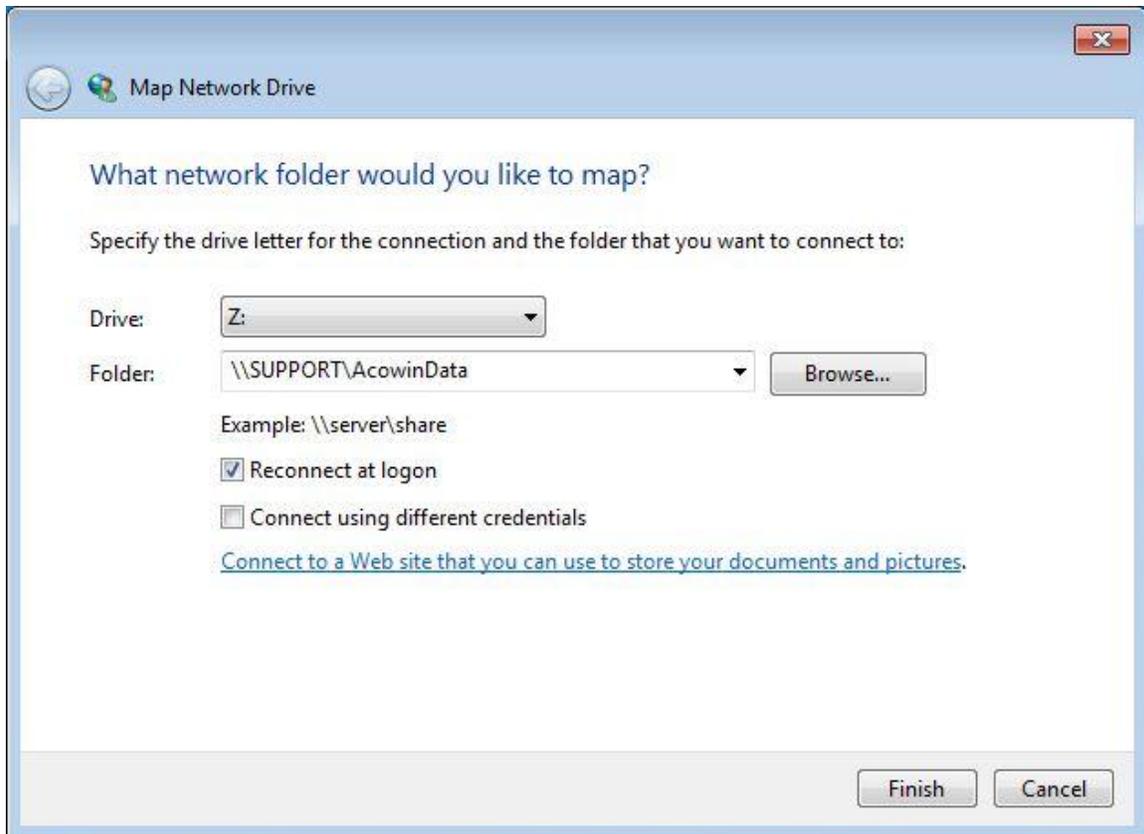


Choose a drive letter from the drop down list or keep the default drive letter. The new drive letter you choose for the mapped resource is not important. Click the Browse button and search for the Shared ACOWIN Data folder on the ACOWIN server.

You may be asked for a login and password at this point. If so, login as the administrator and enter the administrator password (login ID should be either administrator or admin).

NOTE – Be sure to put a check mark in the “Reconnect at logon” check box so that your computer will reconnect to the ACOWIN server any time it is rebooted. *The ACOWIN Workstation program will **not** be able to access the server if you don't **map the server's hard disk!***



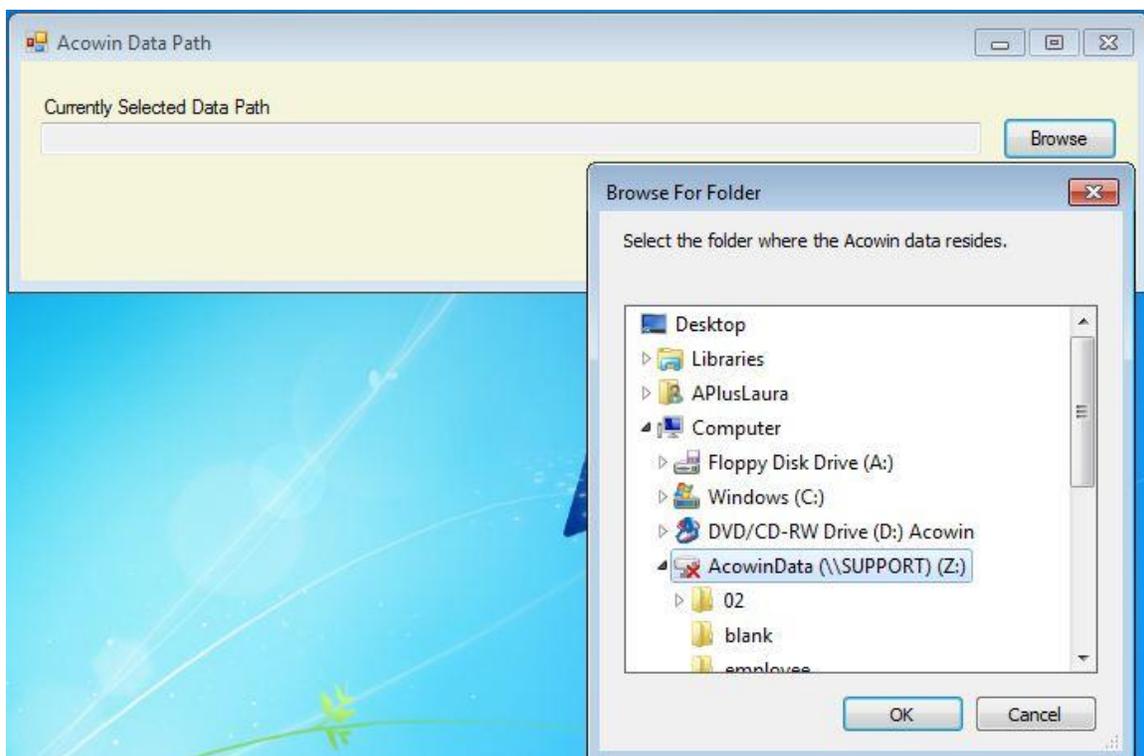


- Once the mapped drive has been established, it's time to install the Acowin software. At each workstation, insert the ACOWIN disk in the CD-ROM drive (or click the download link and Save the setup file to your workstations hard drive) and allow the installation program to run. If the install program doesn't run automatically, you can manually run the program called **launch.exe** on the CD. Your "My Computer" icon could be used to explore the CD and locate this program.
- From the installation program's main menu, choose the "Install and Update" button. You can click Continue or Next to accept all the defaults during the installation process. Be sure to indicate that you accept the license agreement!
- When the program asks if you want a 30 Day Trial, Server Installation or Workstation Installation, choose **Workstation Installation**.
- Continue clicking Next, accepting the defaults. When you get to the screen to select a setup type, be sure to choose **Typical**.
- After the install program has finished, you will be required to Restart your system so ACOWIN can complete the installation process. Be sure to answer yes when prompted to restart your computer.

- After your computer has been rebooted, you will be prompted if you want to Print Workstation Instructions or Continue without printing workstation instructions. You can select either option, but since you are reading this document, you can continue without printing workstation instructions. **NOTE** – If you let your computer sit at this option, it will eventually continue without printing your workstation instructions.
- Click the Continue button when prompted (or if you let the computer sit for a couple of minutes, it will continue on its own.
- After the install program has completely finished, an ACOWIN icon will be added to your desktop.
- You must run the Acowin Datapath program to tell the workstation where it can find the Acowin data. To run the Datapath program, click:

Start / All Programs / Acowin / Datapath

Click the **Browse** button, and navigate through the **mapped network drive** you created earlier. Locate the folder containing the Acowin data, then click the OK button. If your mapped drive points directly to the Acowin Data folder, you can click OK as soon as you select the mapped drive letter. The Currently Selected Datapath should look like this: “X:\” or “X:\Data\”. Click **OK** when the Datapath has been set.

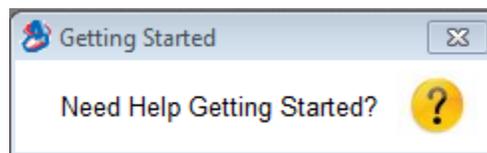


- Remember that the Acowin License Manager program **must** be running on the server before you can log in from a workstation! If the License Manager program is not running, go to the Acowin server and launch this program now.
- Your workstation is now ready to use. Double-click the Acowin icon to log in.

NOTE – If you get an error that says something like “Failed to open “X:license.dbf” (replace “X” with the mapped drive letter you created), then Double Click on “Computer” (or My Computer) on your desktop and Double Click on your Mapped Network drive. If it opens, then double click the ACOWIN Icon again to login. If it doesn’t open, then you mapped the drive incorrectly or the ACOWIN License Manager may not be running on the server.

The Acowin Toolbar

The rest of this guidebook will take you into various setup screens in Acowin. To help you work with these screens, it’s time to introduce you to the Acowin Toolbar. The Toolbar is a row of buttons that appears at the bottom of every Acowin screen. You’ll use these buttons to perform basic functions like adding a record and saving your work. The most important Toolbar buttons are pictured and described below. The Acowin Help system discusses the Toolbar in greater detail – check out the Help chapter called “Acowin Basics”, or watch the Acowin Basics multimedia tutorial available by double clicking the “ACOWIN Tutorials” icon from your desk top. **NOTE** – You can also get to the ACOWIN Basics tutorial by clicking the “Need Help Getting Started?” button after you login to ACOWIN. This link will take you to the basic tutorials that you should watch when you are new to ACOWIN.



Edit – Click this button to edit a screen and make changes to it. On many of the setup screens described below, you’ll click Edit to “open up” the screen, fill out the fields, and then click Save to save your work.



New – Click this button to add a new record to a file. For example, to add a new employee to your system, you’d go to the Employee File and click the New button.



Save – This button saves your work after you fill out a screen.



Revert – You can click this button to abandon any changes you have made, prior to saving, and put a screen back to the way you found it.



Search - This button lets you locate an existing record in your database. Each file in the Acowin system offers different Search options. For example, in the Customer/Site File, you can Search using name, address, or phone number.

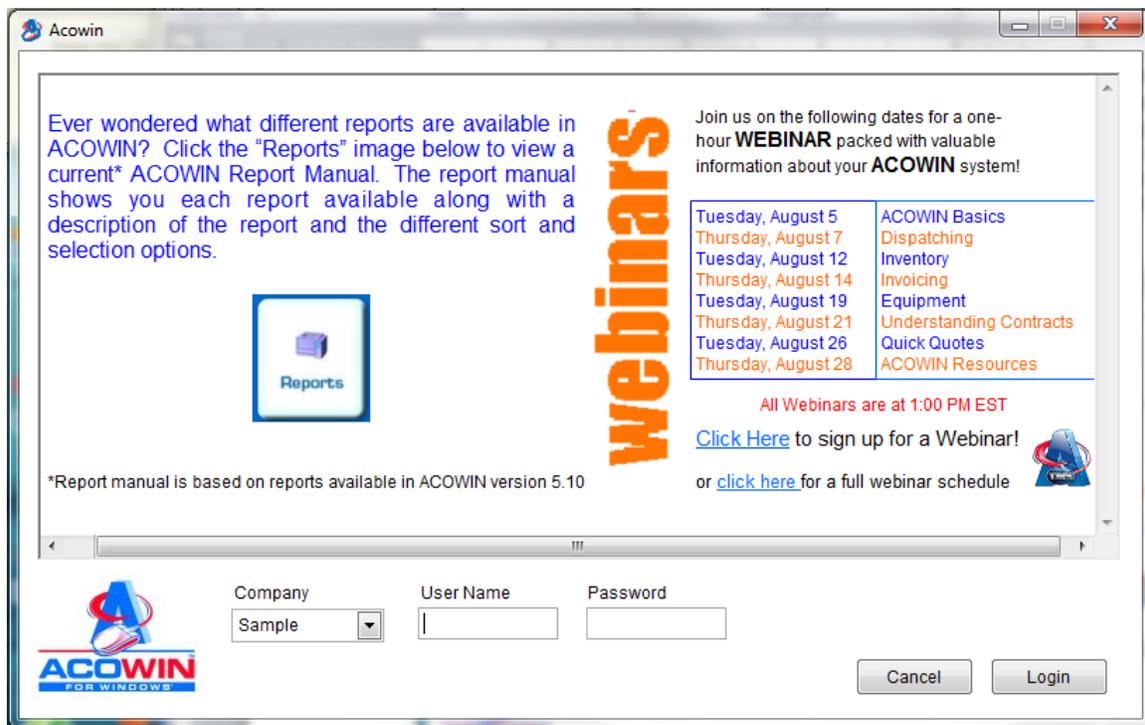


Exit – Clicking this button exits you from a screen and returns you to the previous screen. If you're adding a new record or making changes to a screen, and you click Exit before you click Save, the computer will warn you that anything you've entered on the screen will be lost.

Logging Into Acowin For the First Time

Your Acowin system comes with a fully-prepared company called “Sample”. This company already has some customers, equipment, Call Slips, and Inventory set up, along with a complete Chart of Accounts, Distribution Codes, and System Setup. You can immediately log into the Sample company to test out Acowin or practice using the system – it’s a great way to see what Acowin can do. You can initially log into the Sample company with the user name **GUEST**, and the password “**password**”. If you want, you can later use the Employee File to set up additional users and passwords.

NOTE – The top part of the login screen you see below will change from time to time to make you aware of various events going on with ACOWIN, helpful tips, things that may be of interest, etc.



If you’re running the Acowin demo and you don’t want to set up a live company right now, you can skip to the end of this Installation Guide, and read the section called “**Congratulations!**”³². Then you can log into the Sample company, with user name “GUEST” and password “password”, and begin to play around with the program.

Running the Acowin Setup Wizard

When you’re ready to start entering live data, you’ll want to create a new company. Acowin provides a powerful tool called the Setup Wizard to help you create and configure your new company, quickly and easily. The Setup Wizard

will guide you through the essential steps for defining your new company's service procedures and accounting practices, as well as entering your company's employees and setting passwords for Acowin users. When you're finished with the Setup Wizard, you'll have a fully configured "live" company, ready to take service calls and produce invoices!

NOTE - The the Setup Wizard was designed to make things easy and simple. It will only ask you for the minimum information necessary to produce a full operational company with a simple accounting structure. We designed the Setup Wizard to produce a friendly and easy-to-use program that would help users prepare a basic ACOWIN company. If your company is more complex, and you require more intricate lists of codes, account numbers, and other setup items than the Setup Wizard creates, just use the Wizard to cover your basic setup needs. You can access the various setup screens in Acowin later, to add more codes and accounts for your more intricate needs. In fact, the final screen of the Setup Wizard will helpfully point out where you can go to elaborate on any of the information produced by the Wizard. You'll also find such a list of configuration options, and their locations in the program, at the end of this chapter.

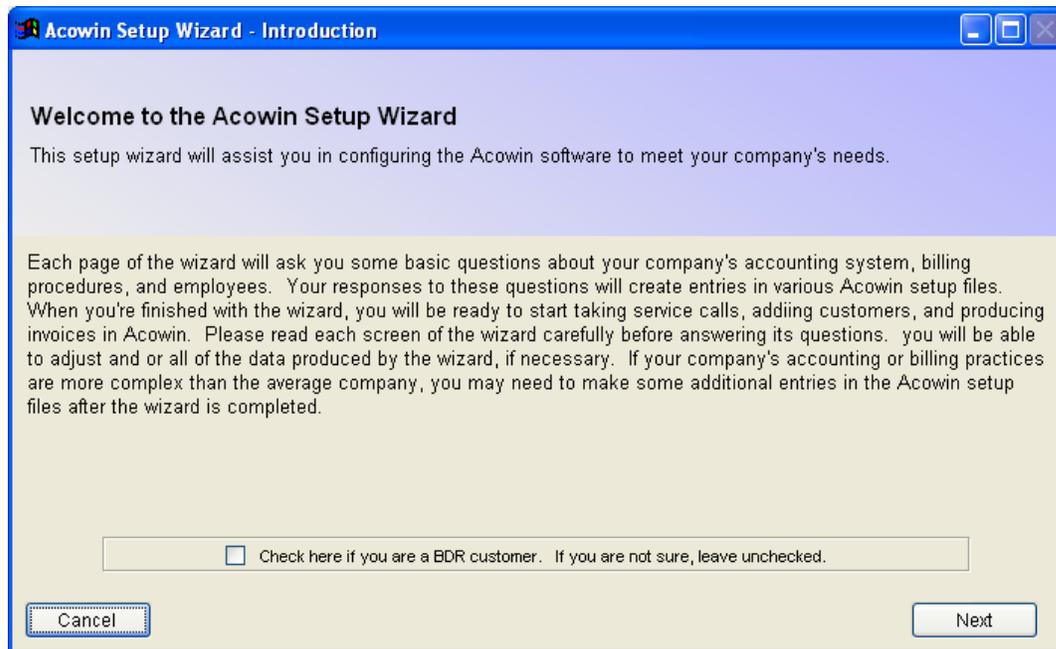
Also, please note that QuickBooks SDK users (QuickBooks 2003 and later) will want to run the QB Wizard after they have completed the Acowin Setup Wizard. The QB Wizard links Acowin into QuickBooks so they can share data. The QB Wizard is discussed in detail in the next section of this Installation Guide.

NOTE – You may want to set up an appointment with ACOWIN support technician to walk you through the Setup Wizard. The Setup Wizard is easy to run, but you do want to make sure that you answer the questions correctly since the answers will be used to create your new company and long into the future.

Before you can run the Setup Wizard, all users must be **logged out of Acowin**. Also, you must **close the Acowin License Manager program**. If anyone is logged in when you try to launch the Setup Wizard, or if the Acowin License Manager is running, you will receive an error message stating that file access is denied, and the Setup Wizard will not run. If you see such an error message, get everyone to log out of Acowin, make sure the Acowin License Manager is not running, and then try the Setup Wizard again. To close the Acowin License Manager, bring it out of "hide" mode (by clicking on the little blue "A" down by your system clock) and then close it with the normal Windows "X" button, in the upper-right corner of the License Manager program.

To run the Setup Wizard, click **Start / Programs / Acowin / Quick Launch**. This program exists only on the Acowin server, not on the workstations, so you must go to the Acowin server to run it. From the Quick Launch menu, choose the **Setup Wizard**.

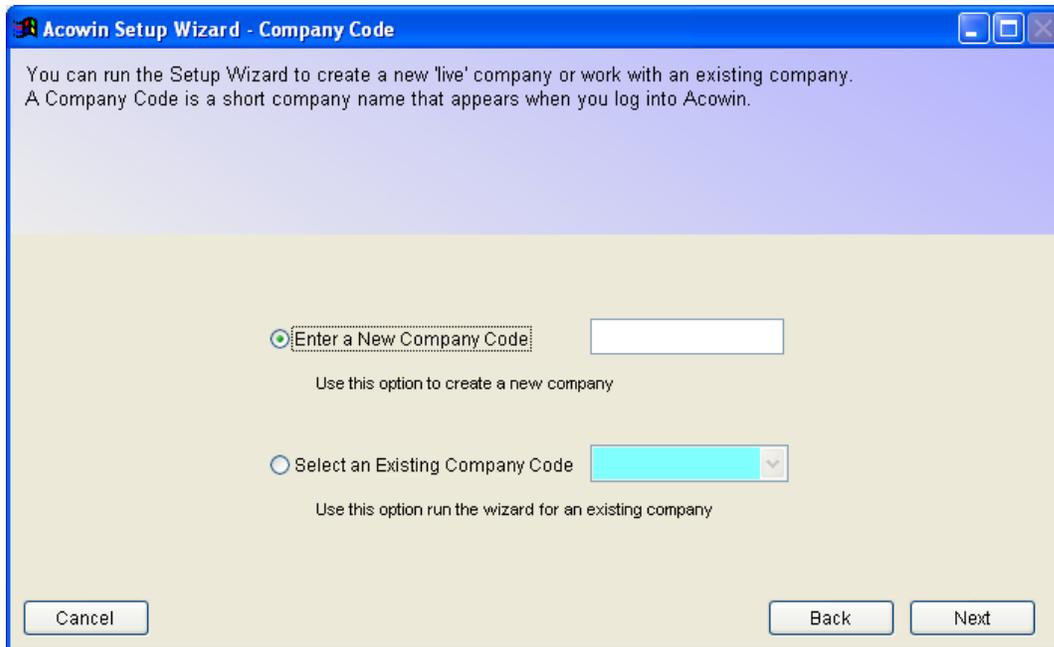
When you launch the Setup Wizard, it will introduce itself and explain what it does, then invite you to click Next to continue. The first screen of the Setup Wizard looks like this:



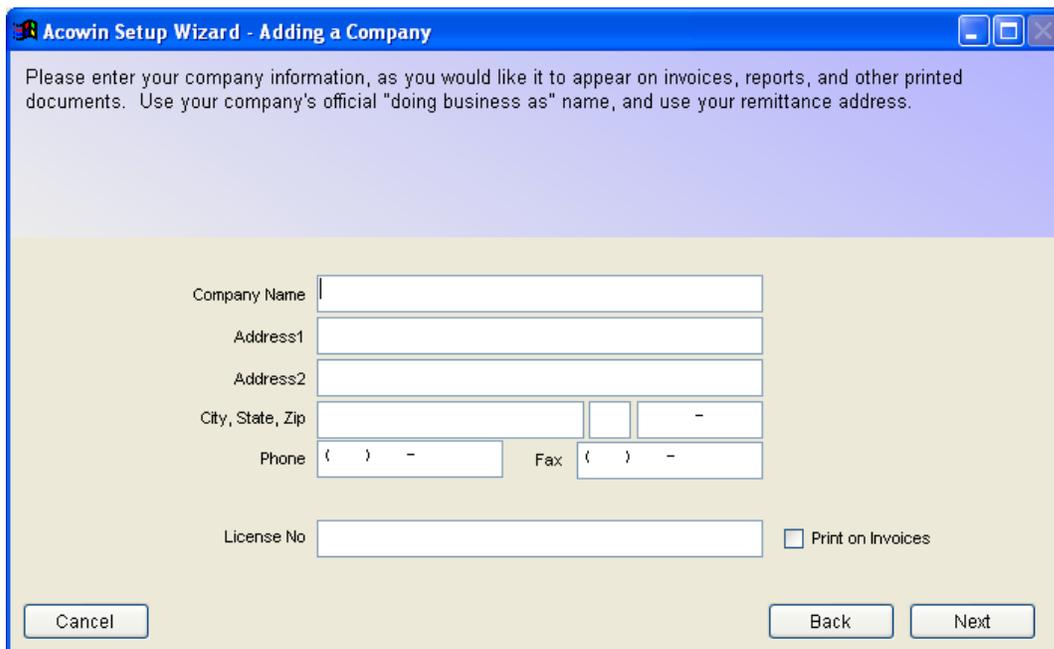
The next screen will ask you to choose between creating a new company, or using the Setup Wizard to configure an existing company in Acowin. It is possible to use the Setup Wizard to configure a company you have already created. New users will most likely want to take this opportunity to create their new company. The “Company Code” requested by the Setup Wizard will be the short company name you see when you log into Acowin and choose a company.

NOTE – If you select an existing company, the only options you will have is to have the system create default Problem Codes, Resolution Codes or Brands based on the type of company you select. Therefore, make sure that you answer all of the questions during the initial running of the Setup Wizard when you initially run it.

This is what the second screen of the Wizard looks like:



If you create a new company, the Setup Wizard will next ask you to provide your company's name, address, and phone number. The screen looks like this:



Important note for QuickBooks users: the Company Name in Acowin must be **exactly** the same as the company name in QuickBooks, because these names are used to link the data in the two programs together. You can check the company name in QuickBooks by pulling down the Company menu and selecting Company Information.

Contact Information	
Company Name	Quality-Built Construction
Address	100 Mason St. Woodcrest, CA 94327
Phone #	650-555-1234
Fax #	650-555-5678
E-mail	qualitybuilt@samplename.com
Web	www.samplename.com
Country	US

The QuickBooks company name, above, must be the same as the Acowin company name, pictured below. This includes capitalization, punctuation, and any special characters, such as hyphens.

From this point onward, the Setup Wizard will ask for basic information about your company policies, costs, billing, and accounting. Each screen of the wizard will clearly explain what is required. You can use the Back button to return to a previous screen if you want, or you can click Cancel to abort and exit from the Setup Wizard at any time. Remember that you can also run the Setup Wizard again for a company you have already established, or use the various Acowin setup screens to alter any of the information produced by the Wizard, so don't be too worried about making a mistake – anything you do with the Wizard can be corrected later, if necessary.

When you finish the Setup Wizard, you'll be ready to log into Acowin, select your new "live" company, and get started using the program! Remember that different companies are **totally separate** from one another. A customer you enter in the Sample company will not appear in the "live" company. This enables you to practice and experiment in the Sample company, without messing up your live data. Be sure to pick the right company when you're logging in!

Following is a list of all the information requested by the Setup Wizard, and the location in Acowin where you can go to make revisions to the data produced by the Setup Wizard. Keep this list handy in case you want to customize the results of the Wizard, correct mistakes that were made when the Setup Wizard was run, or prepare a more complex configuration of Acowin than the Wizard provides for.

Setup Wizard Item	Where to make revisions in Acowin
Your accounting software program	Accounting / Setup / Default Setup
Profit Centers	Accounting / Setup / Profit Centers
Fiscal Year	Accounting / Setup / Default Setup
Account Numbers	Accounting / Setup / Chart of Accounts
Sales Tax percentages	Setup / Subsystems / Tax Regions
Next invoice, Call Slip, customer number	Setup / Settings
Your company logo	Setup / Settings / Forms
Minimum charge and labor billing rates, and material mark-ups	Setup / Subsystems / Rate Types
Billing interval (round up to nearest XX minutes when billing labor)	Setup / Company Info
Default labor costs	Setup / Service Labor Defaults, and Setup / Job Cost Labor Defaults
Problem Codes	Setup / Subsystems / Problem Codes
Brands	Setup / Subsystems / Equipment Brands
Manufacturers	Setup / Subsystems / Manufacturers
Employee information, employee Name Codes, passwords for system users, individual labor costs	Employee File

If you're a QuickBooks SDK user, remember that you will still need to run the **QB Setup Wizard**, which is described in the next section. One of the functions performed by the QB Setup Wizard is importing all your QuickBooks customers into Acowin, so you will probably want to run the QB Wizard fairly soon.

If you're not a QuickBooks user, you may wish to use the **Acowin Data Conversion** tool to import customer data from another program. This is a program that exists only on the Acowin server. Click Start / Programs / Acowin /

Acowin Tools / Data Conversion to launch this program, then click its Help button to read up on how it works, and how you can go about extracting customer data from another program and bringing it into Acowin.

NOTE – If you do not understand the ACOWIN Data Conversion instructions, please contact ACOWIN support for a support technician to discuss the proper way to prepare your data, perform the conversion, etc.

If you are not a QuickBooks user, you are not using QuickBooks Pro, Premier, or Enterprise editions version 2003 or higher, or you do not want to use the “seamless integration” offered by the QuickBooks SDK system, you can skip to the section called “**Congratulations!**” on page32.

The QuickBooks Setup Wizard

The QuickBooks Setup Wizard, also known as the **QB Wizard**, links your Acowin company to the corresponding company in QuickBooks. If you are not a QuickBooks user, or if you don't want to use the “seamless integration” offered by the QuickBooks SDK system, you don't need to run the QB Wizard.

There are actually 2 different QuickBooks Wizards. The standard Wizard and then the Accounts Payable Wizard. If you do not want to integrate Accounts Payables with QuickBooks, then you do not need to run the QuickBooks Wizard for Accounts Payable.

Before You Run the QB Wizard

There are a few things you must configure in QuickBooks and Acowin before you can run the QB Wizard successfully. The QB Wizard will test to ensure all these steps have been completed. The following items must be addressed in QuickBooks:

- ❑ QuickBooks: The Item List must include an item named “Acowin Invoice”, with an Item Type of “Service”. To add this item in QuickBooks, go to the Item List, RIGHT-click on any existing item, and pick New.
- ❑ QuickBooks: Sales Tax must be turned on. In QuickBooks, pull down the Edit menu and choose Preferences. Select the Sales Tax icon on the left side of the screen. Click the Company Preferences tab. The option called “Do you charge sales tax?” **must** be set to “Yes”.

The QB Wizard will import the customers from QuickBooks into Acowin. In order for QuickBooks customers to be imported properly, the following three conditions should be met by **all** active customers in QuickBooks, **before** you run the QB Wizard. You can check a Customer entry, or make corrections, by selecting it on the Customer List and clicking the Edit Information button. (Prior to QuickBooks 2006, you would RIGHT-click on the customer and choose Edit.)

- ❑ Each Customer List entry must have either a Company Name, **or** a First and Last Name. **If all three of these fields are left blank, the Customer List entry is considered invalid, and will not be imported into Acowin.**
- ❑ The phone numbers for each customer must contain **only** numbers. There must be no alphabetic characters in the phone number fields.
- ❑ You must have a valid customer Address in the QuickBooks customer record. If you do not have an address, the record will not be imported even if you met the above 2 requirements.
- ❑ Only Customers will be imported into ACOWIN from QuickBooks, not the Ship To address information. Many people use the ship to address field in QuickBooks for other information than an actual site address (contract info, sales info, equipment info, etc.), so therefore, ACOWIN does not pull the ship to information into ACOWIN.
- ❑ If you're using the QuickBooks Premiere Edition, there must be no active Job information for the customers. On the Job Information tab of each customer, the Job Status field must say "None", and all of the other fields must be **blank**. QuickBooks Pro users will find there is no Job Information tab on their Customer List entries, so they don't need to worry about this condition.

There are also three items that must be set properly in Acowin before you can run the QB Wizard. If you created your new Acowin company with the Acowin Setup Wizard, and you selected the "QuickBooks 2003 or Later" option for accounting software, all of the Acowin steps listed below will **already be completed for you** - you will only need to address the QuickBooks items.

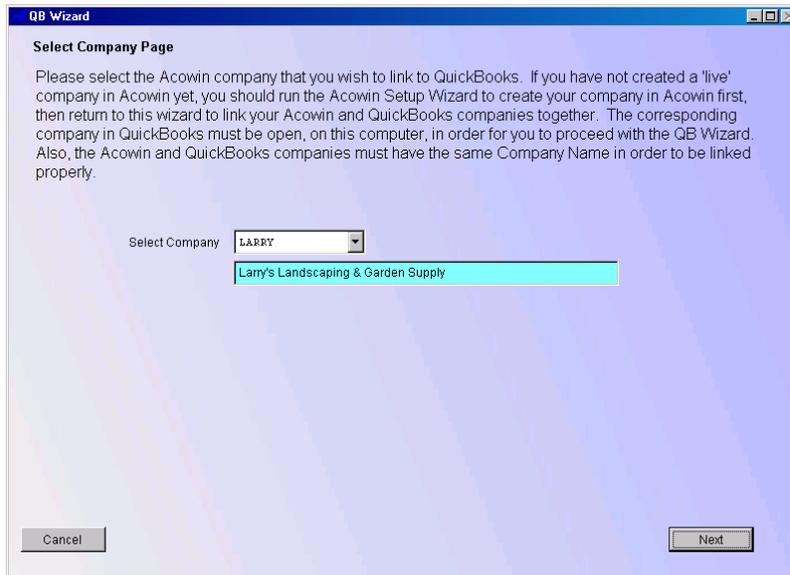
- ❑ Acowin: The Company Name must be the same as the Company Name in QuickBooks.
- ❑ Acowin: Accounting software must be set to "QuickBooks", version 2003 or later, in Accounting / Setup / Default Setup.
- ❑ Acowin: If you are an existing Acowin user who has been processing invoices for some time, and you're now switching to QuickBooks SDK, you must ensure all invoices and payments in Acowin are fully processed, posted, and exported

Running the QB Wizard

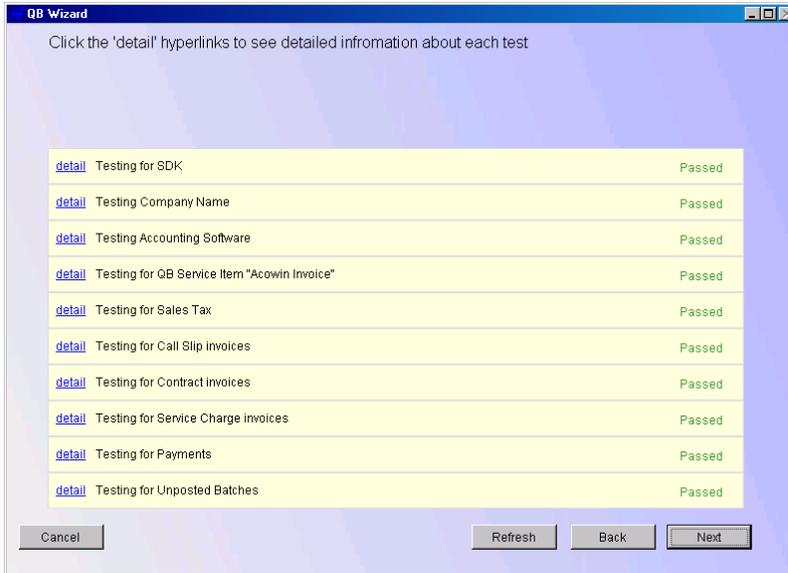
- Acowin must **not** be running. If Acowin is running, click the Exit button on the main menu to exit from Acowin.
- The Acowin License Manager must **not** be running. If it is running, close it. If the Acowin License Manager is in "hide" mode, click on its icon in the System Tray to bring it up full-screen, then close it with the normal Windows "X" button.
- QuickBooks must be installed on the **same computer** that functions as the Acowin server. The Acowin server can't communicate with QuickBooks if QuickBooks isn't installed on the same computer as the Acowin server.

- QuickBooks must be **running** on the Acowin server computer, and the correct company must be **open** in QuickBooks.
- You must be logged into QuickBooks as the **administrator**.
- QuickBooks must be running in **multi-user mode**. You can change to multi-user mode by pulling down the File menu of QuickBooks and choosing “Switch to Multi-User Mode.” If you see an option called “Switch to Single-User Mode” instead, you’re already in Multi-User Mode.

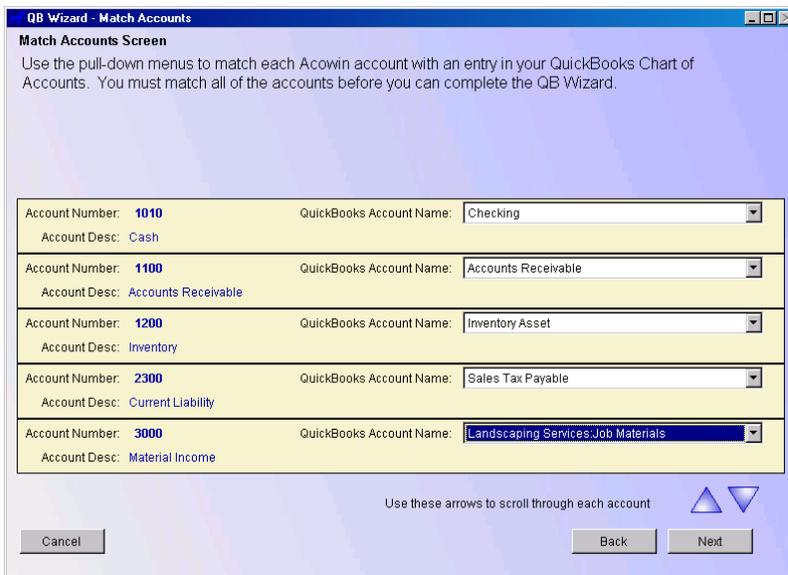
To run the QB Wizard, click Start / Programs / Acowin / Quick Launch. From the Quick Launch menu, select the QB Wizard. The first screen of the QB Wizard will ask you select the Acowin company that will be linked to QuickBooks.



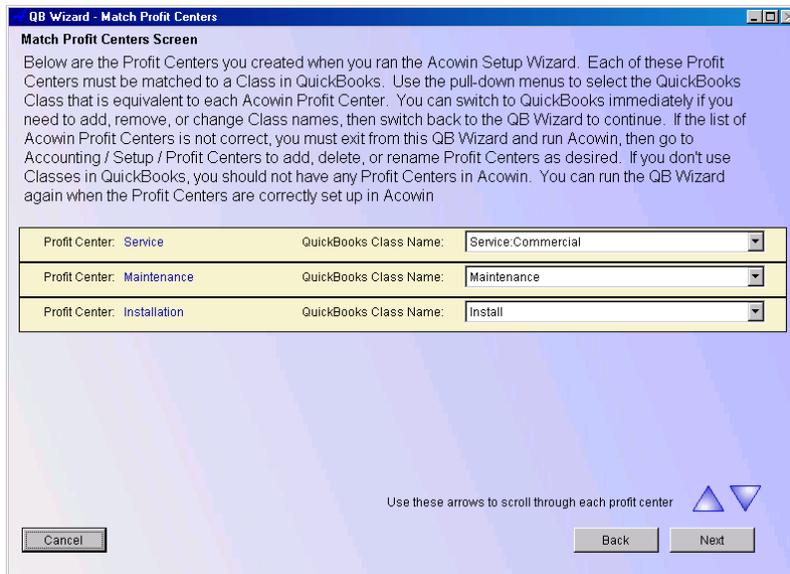
Next, the wizard will perform a series of tests, to make sure both Acowin and QuickBooks are configured properly. All of these tests must be passed in order for you to proceed. If any of the tests fails, you can click on the red “Failed” link to see a detailed explanation of the problem, and instructions for how to resolve it. If any of the QuickBooks tests fails, you can switch to QuickBooks, address the problem, then switch back to the QB Wizard and click the Refresh button to apply the tests again.



Next, the wizard will ask you to match your Acowin Chart of Accounts numbers with the corresponding QuickBooks Chart of Accounts entries. Use the pull-down menus to select the name of the QuickBooks account that matches up with each Acowin account. You must link all of the Acowin accounts to a QuickBooks account before you can click the Next button.



If you created Profit Centers when you ran the Acowin Setup Wizard, the QB Wizard will ask you to link the Profit Centers to the corresponding Classes in QuickBooks. Each Acowin Profit Center must be linked to a QuickBooks Class before you can click the Next button. Using Profit Centers or Classes is optional in both Acowin and QuickBooks. If you didn't create any Profit Centers in Acowin, you won't see this screen of the QB Wizard at all.



The QB Wizard will display a concluding screen and ask you to click Finish. The link between Acowin and QuickBooks will be completed, and all QuickBooks customers will automatically be imported into Acowin. You'll be shown a list of any QuickBooks customers that couldn't be imported, because they were missing crucial information, such as name, phone number or address. When the QB Wizard is finished, you can log back into Acowin. You can now synchronize invoices between Acowin and QuickBooks!

The QuickBooks Wizard for Accounts Payable

After you have run the QuickBooks Wizard to link Accounts Receivable between Acowin and QuickBooks, you can run the wizard that links Accounts Payable between the two programs.

Note: Accounts Payable integration requires QuickBooks version 2006 or higher. QuickBooks 2003 is adequate for integrating Accounts Receivable with Acowin, but you must have the 2006 or later version of QuickBooks to link Accounts Payable.

Before you run the QB Wizard for A/P, you must add a Non-Inventory Part named "Acowin Item" to the QuickBooks Item List. This item will be used when Acowin creates Accounts Payable invoices in QuickBooks. You can choose any General Ledger account to go with this item - the G/L account you select is irrelevant, because Acowin will over-ride it every time it uses the Acowin Item. Here's an example of a properly constructed "Acowin Item."

Edit Item

Type: **Non-inventory Part** (Use for goods you buy but don't track, like office supplies, or materials for a specific job that you charge back to the customer.)

Item Name/Number: **Acowin Item** Subitem of Manufacturer's Part Number

Unit of Measure: **Enable...**

This item is used in assemblies or is purchased for a specific customer:job

Description: Price: **0.00** Item is inactive

Tax Code: **Tax** Account: **5000 · Cost o...**

Buttons: **OK**, **Cancel**, **Notes**, **Custom Fields**, **Spelling**

The QB Wizard for A/P is launched from the Quick Launch menu. Use **Start / Programs / Acowin / Quick Launch** on the server to bring up the Quick Launch menu, then click **QB Wizard for A/P**. As with the Accounts Receivable QB Wizard, you must have QuickBooks **open** into the correct company, and Acowin must be **closed**, when you run the wizard. After asking you to select the Acowin company you're linking to QuickBooks, the QB Wizard for A/P will perform a set of tests to ensure both Acowin and QuickBooks are properly configured for Accounts Payable.

QB - A/P Wizard

Click the 'detail' hyperlinks to see detailed information about each test

detail	Testing for SDK	Failed
detail	Testing for SDK 3.0	Failed
detail	Testing Company Name	Failed
detail	Testing Accounting Software	Passed
detail	Testing QB Wizard	Passed
detail	Testing A/P module status	Failed
detail	Testing for Acowin Item	Failed

Buttons: **Cancel**, **Refresh**, **Back**, **Next**

As with the Accounts Receivable QB Wizard, you can click the red “Failed” hyperlink for any failed test, to receive instructions for correcting the situation. If all the tests are passed, the final screen of the A/P Wizard will ask you to assign account numbers for a set of important General Ledger accounts related to Accounts Payable, and choose the corresponding QuickBooks Chart of Accounts entry for each. You can click the “Suggest” blue hyperlink for each account number to let the wizard suggest an account number for you.

Account Desc	Account Number	QuickBooks Account Name
Accounts Payable	2000 suggest	Accounts Payable
Inventory	1200 suggest	Inventory Asset
Vendor Paid Tax	suggest	Cost of Goods Sold
Vendor Bill Offset	2020 suggest	QuickBooks Credit Card

The purpose of each of these four General Ledger account numbers is as follows:

- Accounts Payable - the Liability account that will be credited by Accounts Payable invoices.
- Inventory - the Asset account that will be debited when materials are purchased for storage in warehouses and trucks.
- Vendor Paid Tax - a Cost-of-Goods or Expense account that will be debited when you pay sales tax to a vendor at the time of purchase
- Vendor Bill Offset - a Liability account that will be credited by the difference, if any, between the original amount of a Purchase Order, and the amount billed on the vendor’s invoice.

Congratulations! You're ready to begin using Acowin!

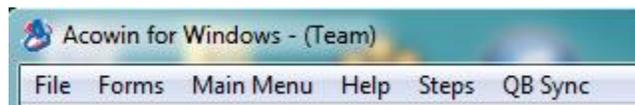
If you've followed the steps in this handbook, your live company is now fully configured and ready to go. You can start adding customers, taking service calls, and producing invoices. Here are a few parting thoughts, reminders, and bits of advice for you as you begin to explore the Acowin system.



► Be sure you create a **Dispatcher entry** for everyone who will use the Dispatch Board, listing the technicians who should appear on the Dispatch Board for that user. If a user without a Dispatchers File entry runs the Dispatch Board, **they will not see any technicians!** The Dispatchers file can be accessed right from the Employee File screen, using the Dispatchers button, or you can also access it in Subsystems, by clicking the Setup button on the Main menu, choose Subsystems, then click Dispatchers. The Company Setup Wizard will automatically create a Dispatchers entry for every employee you indicated was an Acowin *user*. These entries include every employee you indicated was a *technician*.

► Once you have users and passwords entered into the system, be sure to log out as "GUEST", and log back in under your personal user name. The "**GUEST**" **user name** is only meant to be used when you're first setting up the system, and possibly under unusual circumstances in the future (if everyone forgot their passwords, you could log in as "GUEST" to assign new passwords, for example.) You shouldn't use the "GUEST" user name for everyday activities – among other things, the "GUEST" user probably doesn't have an entry in the Dispatchers file, and thus *would not see any technicians when running the Dispatch Board*.

► Use the **Help system!** In the Menu at the top of your ACOWIN screens is a "Help" link. Click and select Help, which will open up a detailed help system.



You can also access help by clicking the Help icon (as seen here)  at the bottom of the various ACOWIN screens. By clicking the Help Icon, you will be taken to the help page associated with the screen from which you are at.

You can run Help right from the Start menu (Start/Programs/Acowin/Acowin Help) and keep it on your desktop at all times, while you're getting used to the new system. Later, you can pull up Help from within the ACOWIN program whenever you need it, using the Help pull-down menu at the top of the screen.

- ▶ Every new user should read the “**Acowin Basics**” book of the Help system, before they get started. These Help pages explain the toolbar buttons and other standard concepts of the system.

- ▶ Be sure to take advantage of the **ACOWIN Tutorials**, which you can access from your computer desk top or from www.acowin.com. These multimedia tutorials offer a guided tour of the entire system, broken down into short, easy lessons. The Setup tutorial covers the setup tasks outlined in this booklet. You can watch the tutorials at your convenience by going to www.acowin.com from anywhere you have internet access. You will need a sound card and speakers to hear the spoken-voice portions of the tutorials.

- ▶ Most **new users** should learn how to add Customer / Site File entries first, then learn how to add Call Slips. This way, everyone will be able to answer the phone and take a service call when you get busy. These two files are also great ways to get acquainted with the new system - just about all of Acowin’s features can be found on those screens. You can let new users log into the Sample company to practice, since Call Slips and invoices added to the Sample company will have no effect on your live company data.

- ▶ It’s important for users to **log out** of the system when they’re finished using it for the day. There are two ways to log out:
 - Click the standard Windows close button (the “X”) at the top-right corner of the ACOWIN window.
 - Pull down the File menu at the top of the ACOWIN window and choose Quit.

- ▶ If your users **don’t log out correctly**, your workstation licenses may not be released. In other words, the system might still think they’re logged in. This could happen any time a workstation is rebooted or shut down without the user logging out of ACOWIN – a sudden power failure, for example

- ▶ As you make your way through the system, you’ll run into **pull-down menus** that contain lists of choices. Most of these lists are maintained in the Subsystems menu of the Setup file. You can add new choices to almost any pull-down list by *right-clicking* your mouse on the drop down field. For example, if you’re setting up some Equipment and you need to add a new Brand, you could right-click on the Brand field. You should be able to build most of your pull-down lists as you go, using this approach.

- ▶ It is **strongly recommended and critical** that you install a **battery backup** on all of your Acowin computers, both server and workstations, to reduce the risk of damage to your data during power failures and brown-outs. You should also connect your network hub or router to a battery backup. Since Acowin is a multi-user network application, power failures that knock out the computers, hub, or router could cause damage to your data. Battery backups are very affordable,

and can be purchased from any computer or office supply store. A few dollars invested in battery units will protect your computer hardware and valuable data!

Backing Up Your Acowin Data

Be sure to **back up your data regularly!** At a minimum, you should prepare a complete backup of the C:/AcowinData folder (or where your ACOWIN data is being stored) from the server every night. In addition to the ACOWIN Data folder being backed up, you also need to back up your ACOWIN attachments folder. The location of your attachments is not part of the ACOWIN Data folder, so it is very important that you also back up your attachments. If you keep data from several shared programs on the server, you should back up the entire server every night

There are several hardware options for making backups:



External hard drives (or Jump/Thumb drives) can hold a large amount of data, are inexpensive and can produce “unattended” backups – the backup software is instructed to run overnight, and the entire backup fits on the external hard drive. You should have several external hard drives and rotate them out throughout the week. This way if you have a problem, you will have several backups to be able to try to recover. It is much better to lose a day or several day worth of data than all of your data. It is also highly recommended that you take a backup off site with you. You can have the best backup system in the world, but if your hardware gets stolen or damaged because of fire, flood, etc., you will be thankful that you had a backup off site.



Online “cloud” backups – if you are going to do an online backup, make sure that it is not doing an instantaneous backup of your ACOWIN files throughout the day, but backing it up in the middle of the night or at a time when no one is using the system. If doing online backups, we recommend that you schedule them between 2:00 AM and 5:00 AM. ACOWIN does some automatic processing at night at 1:00 AM local time, so be sure you do not set your automatic backup to run at this time.



CD/DVD-R drives can write a large amount of data to a special type of compact disk. The disks can typically only be written once, but they are inexpensive, and each one stores a great deal of data – about 500 megabytes on a CD Rom and about 4 GB on a DVD.

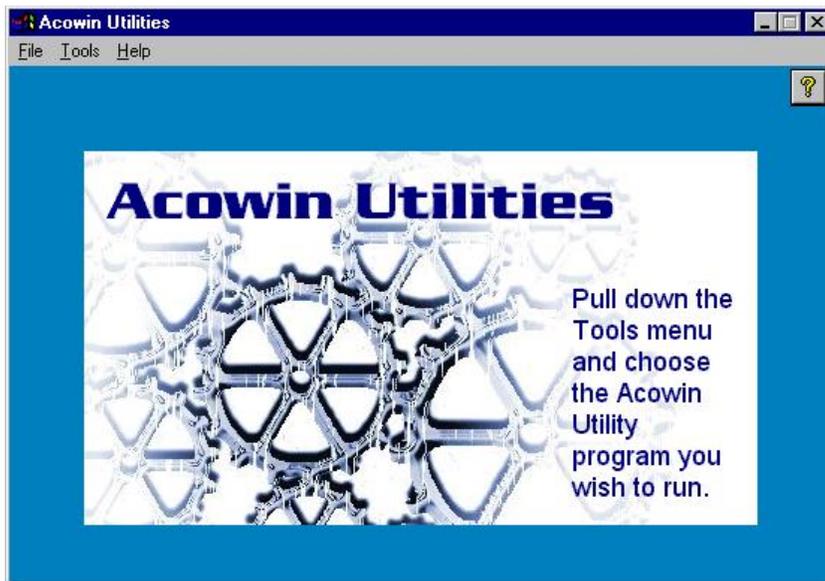


Tape drives can produce “unattended” backups – the backup software is instructed to run overnight, and the entire backup fits on a single tape. You can purchase tape drives with many different speeds and capacities. With a high-capacity tape drive, you could back up both the server and selected data from all across your network, such as everyone’s spreadsheets and word processing documents, every night. If you are using a tape backup system, it is recommended that you have a different tape for each day of the week and you rotate them out every day. As mentioned prior, it is highly recommended that you take the prior days backup tape off site with you at the end of the day in case of tragedy.

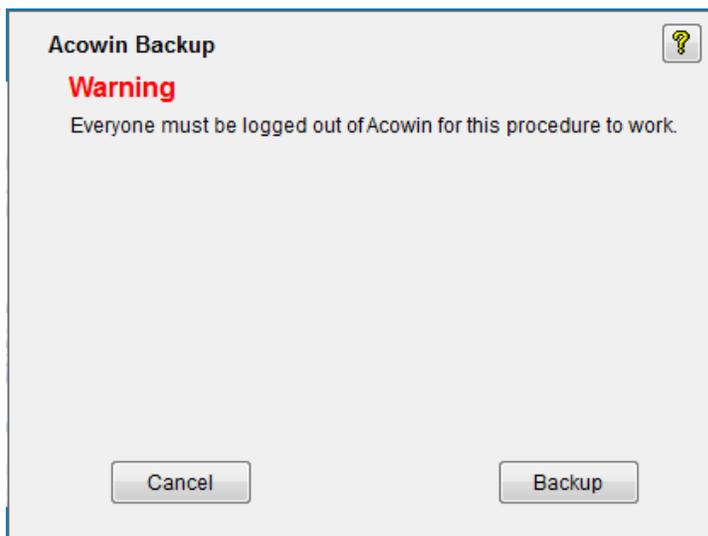
The Acowin Backup Utility Program: Acowin includes a utility program that can help you make backups, by compressing all of your data into a single, compacted file known as a “zip” file. You can create a “zip file” and copy it onto any sort of computer storage device. Using this backup utility is optional – you can still create backups by copying the C:\Acowin\Data folder (or your system’s data folder location) as well as the ACOWIN Documents folder from the server onto a disk, CD/DVD, External Hard Drive, Jump/Thumb drive, Cloud Backup or tape cartridge, without compressing it first. The Acowin Backup utility makes backups easier because instead of copying an entire folder filled with dozens of files, you’ll have a single “zip” file to copy, and it will be much smaller than the uncompressed Data folder would be. Here are the instructions for using the Acowin Backup program:

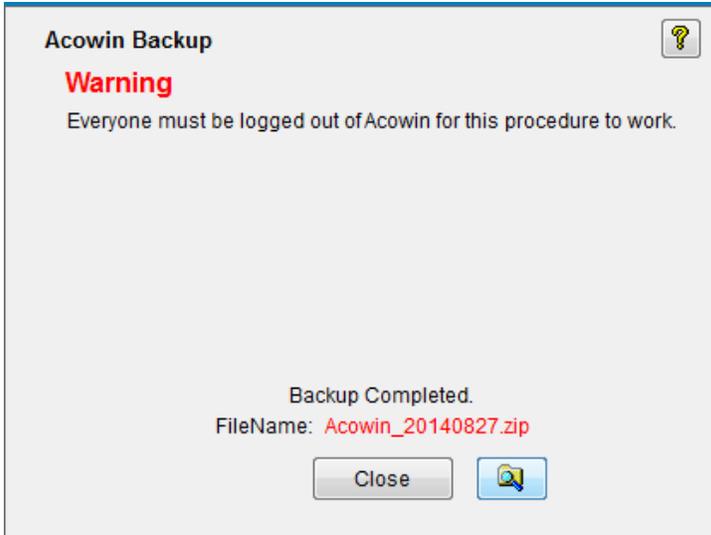
- When you use the Acowin Backup, make sure everyone is logged out of Acowin, and the Acowin License Manager program is **not** running.
- On the Acowin server, click Start, then choose Programs / Acowin / Acowin Quick Launch (or select the ACOWIN Quick Launch icon from your ACOWIN Server’s desk top).
- Pull down the Tools menu of the Acowin Utilities program, and choose Backup.
- You’ll see a message reminding you that everyone must be logged out of Acowin before you can proceed. Click the Backup button to make your backup.
- You’ll see an animated progress indicator, showing you all of the Acowin data files being compressed into the zip file. This can take several minutes.
- When the process is completed, the Acowin Backup program will tell you the name of the zip file that was created. Its name will include the word “Acowin” and the year, month, and day the file was created. It will look something like this: **Acowin_20140827.zip** If you create multiple backup files on the same day, each new file has another number added to its name, so each backup is guaranteed to have a unique file name.

- The new backup file will be saved in the My Documents\AcowinBackup folder on the Acowin server. The final screen of the Backup program includes a “magnifying glass” button that will open this folder. Backup files will remain here indefinitely, until and unless you delete them. The new backup file can be copied from the AcowinBackup folder to an external backup device, such as an external hard drive, jump/thumb drive, CD/DVD, tape backup, etc. **NOTE** - if you just leave the backup zip files on your server’s hard drive, and the hard drive crashes, the backups won’t do you any good. If you have an automatic backup program that runs overnight, configure it to include the AcowinBackup folder.

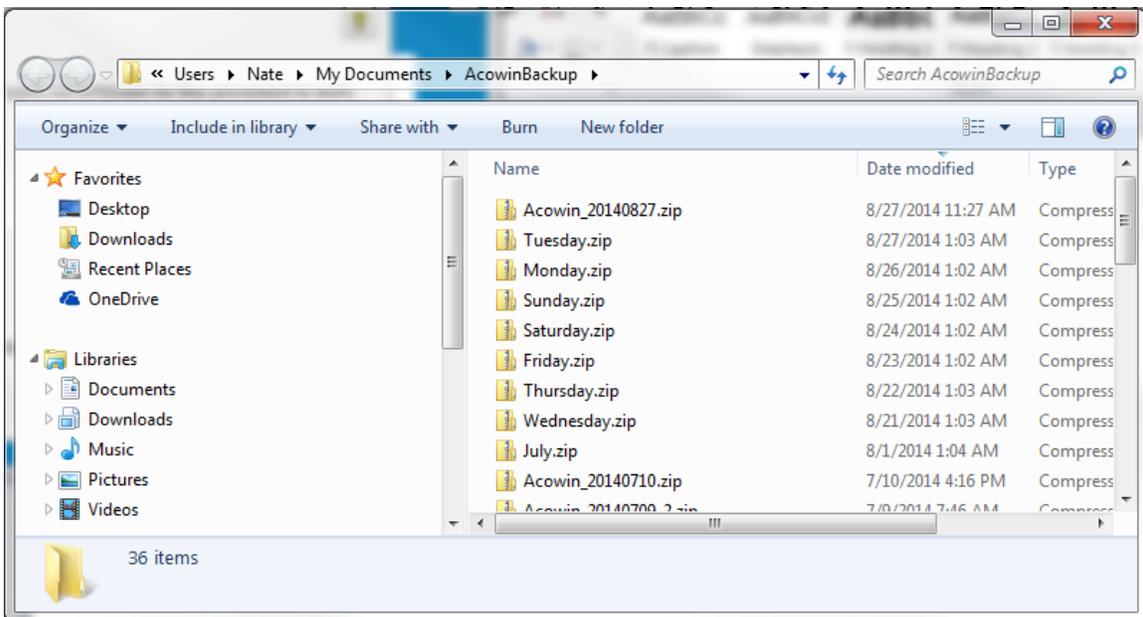


This is the Acowin Utilities program. Pull down the Tools menu and choose Backup to make a backup zip file.





After the backup is made, you will have an option to drill down to the file location by clicking the “File Folder with magnifying glass” icon.



Here are some Acowin backup files, sitting in the AcowinBackup folder. From here, the zip files can be copied to an external backup device.