Client Data System®

Installation Guide

Version 4.2 (Stand-alone)

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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 version 4.2 of the application.

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 4.2:

266 MHz Pentium-class processor (400 MHz or higher recommended)

64 MB of RAM (128 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, Me, NT, 2000, or XP operating system

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® Outlook 2000 or Lotus Notes R5, or a later version, is required to use the E-Z Mail interface. Please note that the program does not support Microsoft® Outlook Express.

Palm™ Desktop for Windows software version 3.0.1, or a later version, is required to use the E-Z Conduit Module.

Warning: AXA Agent Workstation Users should refer to the <u>CDS Installation for AXA Agent Workstations section</u>.

Before the Installation

Norton AntiVirus Users: Disable Norton AntiVirus Auto-Protect before installing CDS.

Note: 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 click the **Auto-Protect** tab.

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

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

5. Exit Norton AntiVirus.

E-Z Conduit Module Users Only

Note: Other third-party conduits (Microsoft Outlook Conduit, Pocket Mirror, etc.) must be uninstalled before the installation of the E-Z Conduit Module.

1. Ensure that Palm™ Desktop for Windows is installed. If it is not currently installed, install it from a Palm™ Desktop for Windows CD or download the latest version from <u>http://www.palm.com/support/downloads/#windowsdesktop.</u> Upgrading to the latest version of Palm™ Desktop is highly recommended.

2. Run a HotSync® session to reconcile data between Palm™ Desktop for Windows and the handheld device. If the HotSync® does not work properly, contact Palm Technical Support at (847) 262-7256 for assistance.

3. If a database that has been converted for use with CDS 4.2 has been installed and the Contact and Activity records in the PDA duplicate the Contact and Activity records in the converted database, delete the duplicate records in Palm™ Desktop for Windows. If these records are not deleted, duplicate records will be created in CDS. After deleting the duplicate records, run a HotSync® session to reconcile the changes.

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 any Windows applications that are currently running, including any suite products. To open the Task List, press the **CTRL**+**ALT**+**DEL** keys. Select and then click the **End Task** button for each task except **Explorer** and **Systray**.

2. Insert the Client Data System CD into the CD-ROM drive. The E-Z Data Setup program should start automatically. If it does not start, continue with the next step. Otherwise, skip to Step 7 to proceed with the installation.

3. From the Taskbar, click the **Start** button and then select **Run**.

4. Click the **Browse** button to open the Browse dialog box. From the **Look in:** field, select the CD-ROM drive from the drop-down menu.

5. Double-click **EZSetup** to select it and close the Browse dialog box.

6. Click the **OK** button in the Run dialog box to start the E-Z Data Setup program.

7. Click the **CDS** button to begin installation of Client Data System.

8. To also install the E-Z Conduit module, click the **E-Z Conduit** button to add it to the installation process.

9. To also install the E-Z Mail module, click the **E-Z Mail** button to add it to the installation process.

10. After selecting the Setup program options, click the **Install** button to proceed with the installation.

11. After reading the Welcome message, click the **Next** button to continue.

12. After reading the Software License Agreement, click the **Yes** button to accept the terms of the license and continue with the installation.

13. In the Installation Type dialog box, select the **CDS Installation/Upgrade** option and click the **Next** button.

14. In the Select Components dialog box, click the **Single User** button.

    Note: If the Adaptive Server Anywhere 7.0 has already been installed, Steps 15-18 will be omitted.

15. 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.

16. Click the **Next** button to accept the default directories where the Adaptive Server Anywhere 7.0 components will be installed.

17. When the installation is complete, select the **Yes, I want to restart my computer now** radio button and click the **Finish** button to restart the computer.

Note:	The computer may take a couple of minutes to restart. Do not shut the power off or reset the computer unless the computer has definitely stopped responding to the Setup program.

18. Upon restart, the CDS Setup program will start again. Click the **Next** button in the Welcome message dialog box to continue with the installation of CDS.

19. In the Setup Type dialog box, use **Typical** for the type of Setup. The Compact or Custom setups are not recommended for Stand-alone installations. Click the **Next** button to accept the default Destination Directory (C:\Program Files\CDSWin).

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

21. In the Start Copying Files dialog box, review the list of Current Settings. If a changed 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.

22. When the progress bar is at 97%, 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.

23. Earlier versions of Windows will now produce a **Restarting Windows** dialog box. If this occurs, select the **Yes, I want to restart my computer now** radio button, remove the floppy disk from drive A. If neither the E-Z Conduit or E-Z Mail options were selected, skip to step 26.

24. The E-Z Conduit Module Setup program will begin if this option was selected. After reading the Welcome message, click the **Next** button to continue with the E-Z Conduit Module Setup. When the Setup is complete, click the **OK** button to exit.

25. The E-Z Mail Setup program will begin if this option was selected. After reading the Welcome message, click the **Next** button to continue with the E-Z Mail Setup. Follow the on-screen prompts to complete the installation.

26. When the Congratulations 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 click the **Auto-Protect** tab.

3. Check the **Load Auto-Protect at Startup option** and 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.

CDS Installation for AXA Agent Workstations

To install Client Data System on an AXA Agent Workstation (a Windows-based desktop or laptop computer specifically provided by AXA Financial or its affiliates), please follow the instructions listed in this section.

FAILURE TO FOLLOW THE CORRECT INSTALLATION PROCEDURE CAN RESULT IN A COMPLETE LOSS OF HARD DRIVE DATA.

If CDS has already been upgraded to version 4.2 but without installing the E-Z Conduit Module and/or the E-Z Mail Module, see the E-Z Conduit Module Only section for instructions on installing the optional modules only.

Before the AXA Agent Workstation Installation

Before beginning installation, disable the Norton AntiVirus temporarily.

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

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

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

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

5. Exit Norton AntiVirus.

E-Z Conduit Module Only for AXA Agent Workstations

Note: Other third-party conduits (Microsoft Outlook Conduit, Pocket Mirror, etc.) must be uninstalled before the installation of the E-Z Conduit Module.

1. Ensure that Palm™ Desktop for Windows is installed. If it is not currently installed, install it from a Palm™ Desktop for Windows CD or download the latest version from http://www.palm.com/support/downloads/#windowsdesktop. Upgrading to the latest version of Palm™ Desktop is highly recommended.

2. Run a HotSync® session to reconcile data between Palm™ Desktop for Windows and the handheld device. If the HotSync® does not work properly, contact Palm Technical Support at (847) 262-7256 for assistance.

3. If a database that has been converted for use with CDS 4.2 has been installed and the Contact and Activity records in the PDA duplicate the Contact and Activity records in the converted database, delete the duplicate records in Palm™ Desktop for Windows. If these records are not deleted, duplicate records will be created in CDS. After deleting the duplicate records, run a HotSync® session to reconcile the changes.
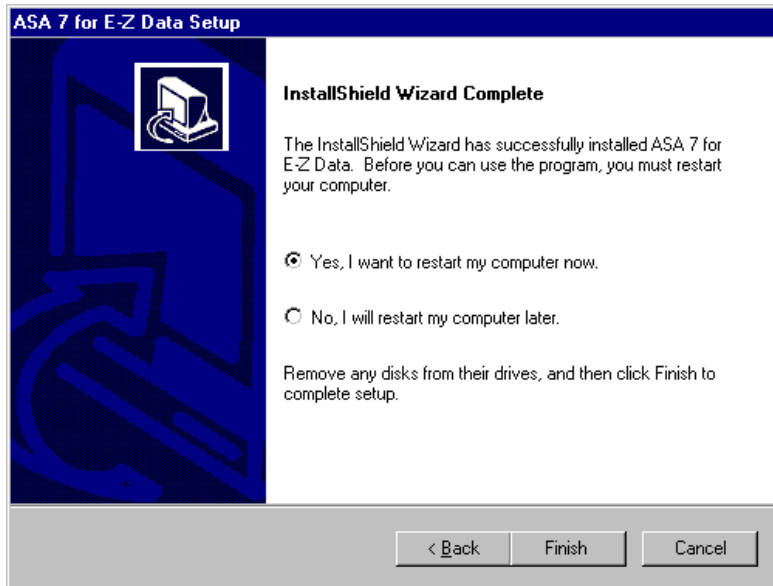
Installation for AXA Agent Workstations

1. Close any Windows applications that are currently running, including any suite products. To open the Task List, press the **CTRL**+**ALT**+**DEL** keys. Select and then click the **End Task** button for each task except **Explorer** and **Systray**.

2. Insert the Client Data System CD into the CD-ROM drive. The E-Z Data Setup program should start automatically. If it starts, continue with the next step. Otherwise, skip to Step 5.

Note:	Sybase Adaptive Server Anywhere 7.0 must be installed by a special procedure before running the E-Z Data Setup program. Do not allow E-Z Data Setup to run at this time.

3. Click the **Exit** button to close E-Z Data Setup.

4. From the Taskbar, click the **Start** button and then select **Run**.

5. Click the **Browse** button to open the Browse dialog box. From the **Look in:** field, select the CD-ROM drive from the drop-down menu.

6. Double-click the **CDS41** folder.

7. From the CDS41 folder, double-click the **ASANY7** folder.

8. From the ASANY7 folder, double-click **Setup** to select it and close the Browse dialog box.

9. Click the **OK** button in the Run dialog box.

10. When the ASA 7 for E-Z Data Setup dialog box opens, click the **Next** button to accept the default directories where Adaptive Server Anywhere 7.0 components will be installed.
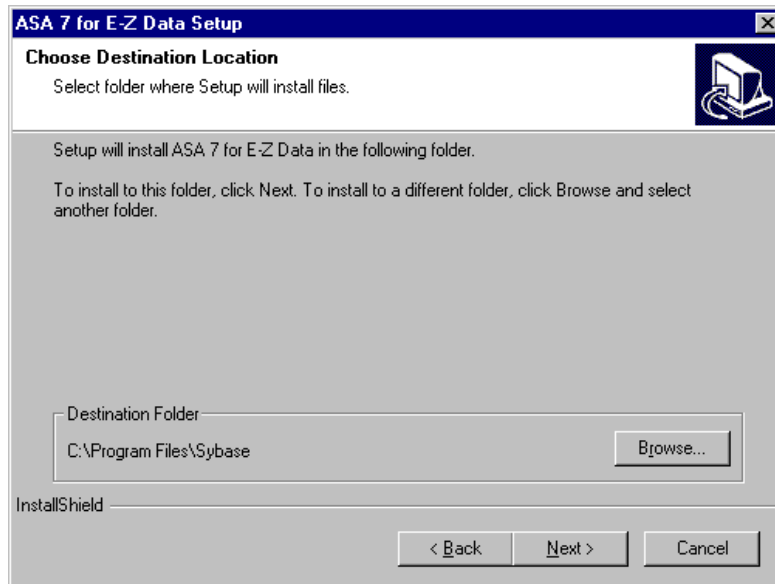
11. When the installation is complete, select the **Yes, I want to restart my computer now** option and click the **Finish** button to restart the computer.

Note:	The computer may take a couple of minutes to restart. Do not shut the power off or reset the computer unless the computer has definitely stopped responding to the Setup program.

12. After the computer restarts, close any Windows applications that may have opened, including any suite products and CDS Setup. Press **CTRL**+**ALT**+**DEL** and end all tasks except Explorer and Systray.

13. From the Taskbar, click the **Start** button and select **Run**.

14. Click the **Browse** button to open the Browse dialog box. From the **Look in:** field, select the CD-ROM drive from the drop-down menu.

15. Double-click the **EZSetup** icon to select it and close the Browse dialog box.

16. Click the **OK** button in the Run dialog box to start the E-Z Data Setup program.

17. Click the **CDS** button to begin installation of Client Data System.

18. To also install the E-Z Conduit module, click the **E-Z Conduit** button to add it to the installation process.

19. To also install the E-Z Mail module, click the **E-Z Mail** button to add it to the installation process.

20. After selecting the Setup program options, click the **Install** button to proceed with the installation.

21. After reading the Welcome message, click the **Next** button to continue.

22. After reading the Software License Agreement, click the **Yes** button to accept the terms of the license and continue with the installation.

23. In the Installation Type dialog box, select the **CDS Installation/Upgrade** option and click the **Next** button.

24. In the Setup Type dialog box, use **Typical** for the type of Setup. The Compact or Custom setup options are not recommended for Stand-alone installations. Click the **Next** button to accept the default Destination Directory (C:\Program Files\CDSWin).

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

26. In the Start Copying Files dialog box, review the list of Current Settings. If a changed 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.

27. When the progress bar is at 97%, 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.

28. When the Restarting Windows dialog box opens, select the **Yes, I want to restart my computer now** radio button, remove the floppy disk from drive A. If neither the E-Z Conduit or E-Z Mail options were selected, skip to step 31.

29. The E-Z Conduit Module Setup program will begin if this option was selected. After reading the Welcome message, click the **Next** button to continue with the E-Z Conduit Module Setup. When the Setup is complete, click the **OK** button to exit.

30. The E-Z Mail Setup program will begin if this option was selected. After reading the Welcome message, click the **Next** button to continue with the E-Z Mail Setup. Follow the on-screen instructions to complete the setup.

31. When the Congratulations dialog box appears, click the **Finish** button to exit.

After the Installation for AXA Agent Workstations

Norton AntiVirus can now be re-enabled. Continue as follows:

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

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

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

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

5. Exit Norton AntiVirus.

The installation process is complete. See the Using CDS for the First Time section on page 10 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 just 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 into this database as the demonstration user to create agency databases and users for their company.

To Create a Database

1. From the Taskbar, click the **Start** button, point to **Programs**, then **Client Data System**, and 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 into CDS (no password is required for DEMO).

3. From the CDS desktop, click **Database** and 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 click the **OK** button.
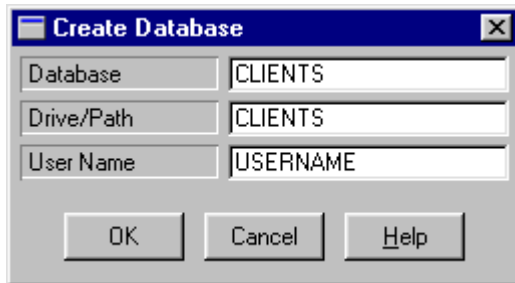
   Example: The Drive/Path location is a subdirectory of the CDSWIN directory. The CLIENTS database will be created in a subdirectory of CDSWIN named CLIENTS. Each database created is located in a subdirectory of the same name as the database. Do not enter path information (e.g., C:\Program Files\CDSWin\Clients) 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. If the E-Z Conduit Module was installed, proceed to the Setting up the E-Z Conduit Module section for setup procedures. If E-Z Mail was installed, see the CDS Help topic *E-mail Utilities* for setup information.

Setting up the E-Z Conduit Module

Before performing the first synchronization between the PDA device and CDS, follow these steps:

Tip:	The contact records in the PDA can be imported as the basis for a new database during the first synchronization.

1. Log in to the CDS database to be used with the PDA device.

2. From the CDS desktop, click **Database** and then **User Management** to open the Database Users dialog box.

3. Double-click the user that will be using the E-Z Conduit Module to open the User Profile window for the selected user.

4. Click the **Security Information** tab to bring it to the forefront.

5. In the **Data Security Options** section, click the down-arrow of the **PDA Options** menu and select **Conduit.** Then, click the **OK** button.


6. When prompted, click the **OK** button to log out of CDS and then log back in as the User who will be using the E-Z Conduit Module to enact the changes.

7. From the CDS desktop menu bar, click **Tools** and select **PDA Interface Setup**. This opens the PDA Sync Setup dialog box.
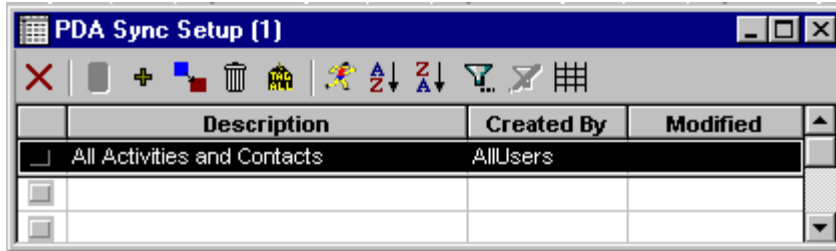
8. From the PDA Sync Setup, double-click the **All Activities and Contacts** row to start the PDA HotSync Setup Wizard.

9. After reading the Welcome message, click the **Next** button to start the Wizard. Follow the on-screen instructions to complete the setup. For more information about this process, see the CDS Help topic **Adding a PDA HotSync Setup Record**.

10. From the PDA Download Description dialog box, click the **Setup** button to set the custom fields in the PDA device to download from (and subsequently upload to) fields in the CDS Contact Information table. To save this Setup record without assigning custom fields, click the **Finish** button and proceed to Step 14.
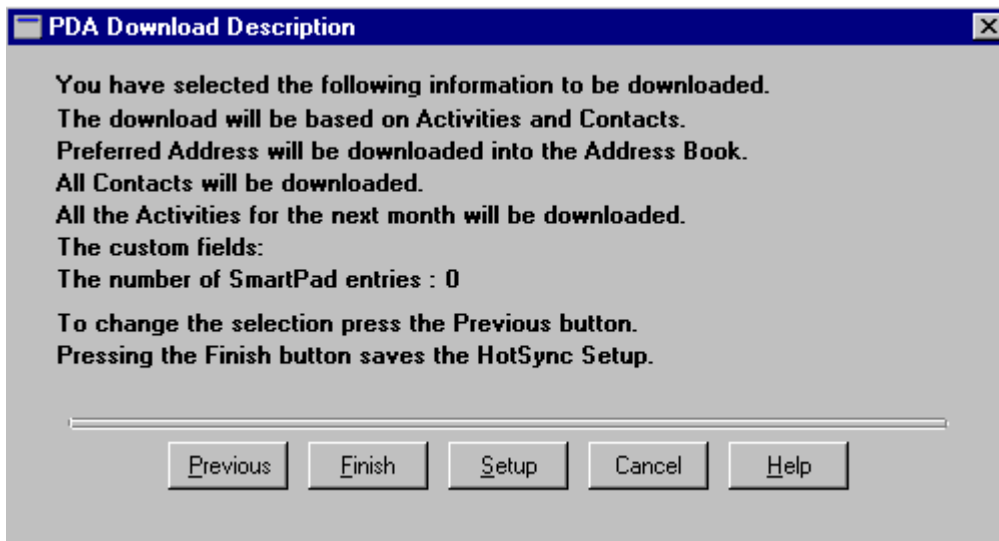
11. Assign a field from CDS to the first of four custom fields available on the PDA device. Click the down-arrow for **Custom1**, use the scroll bar to find the field name, and then select the field. Repeat this process for **Custom2**, etc.
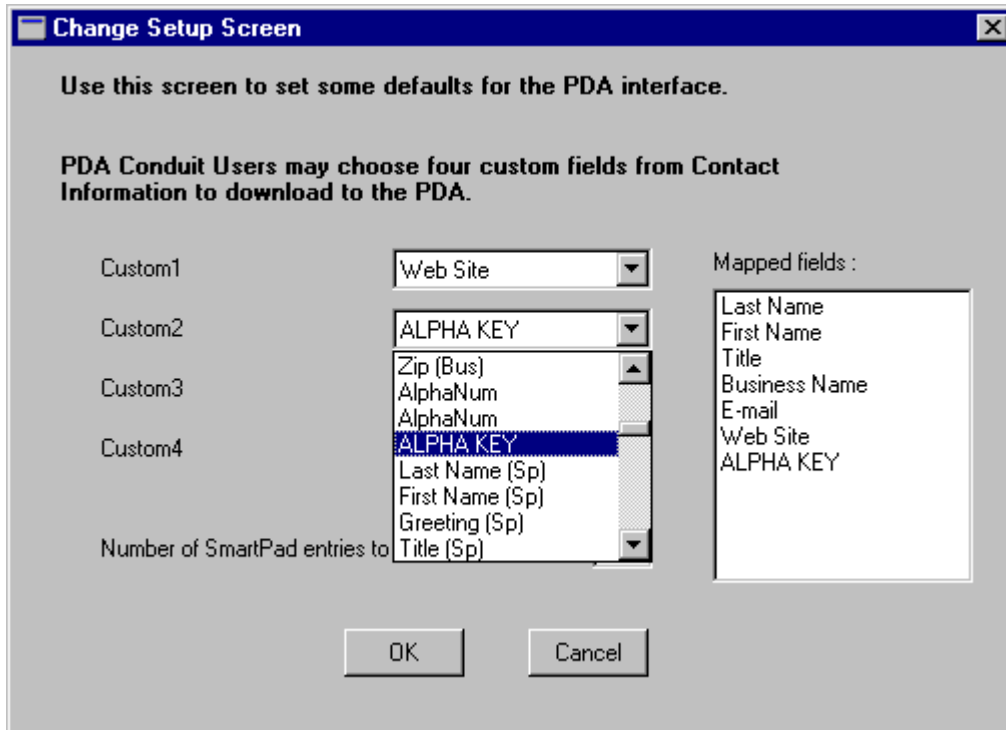
Note:	Choose the correct fields before selecting them. Once selected, the fields cannot be changed for this User's setup without risk of data corruption.

12. Click the **OK** button to confirm the selections and return to the PDA Download Description dialog box.

13. Click the **Finish** button to save this setup.

14. In the Save the PDA Download dialog box, change the **Description** and add a **Keyword**, if necessary.

Note:	If custom fields were assigned to the PDA device (as in Step 13), clear the **All Users** dialog box before clicking the **OK** button to save this setup. If **All Users** is not cleared, all PDA device users will have the same custom field assignments when connecting to CDS. Select **All Users** to make this setup available to all users.

15. Click the **OK** button to save the PDA Sync Setup.

16. If necessary, start the Palm HotSync® Manager, which is sometimes required for a HotSync®.

The E-Z Conduit Setup is now complete. For more information on usage, see the *E-Z Conduit Module* section of the CDS Help.