

Installing The Trial Version of Roundtable Software Advantage Accounting System Version 4 and Windows Modules

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System Requirements

- Windows 98/2nd Edition and up
- 150 MB of free disk space
- No special memory/CPU requirements

MAKE A COMPLETE SYSTEM BACKUP

Before loading any software you should always back up the important files on your system.

DO NOT INSTALL ON A SYSTEM ALREADY RUNNING RTS-ADVANTAGE

This trial version of the software is not intended for installation on a system that is currently running *any* version of the Advantage Accounting Software. Attempting to do so may result in losing access to your live data.

Thank you for your interest in the RTS–Advantage Accounting System. This documentation provides instructions on how to load the trial version of the accounting software as well as instructions for loading the X-Charge Credit Card Processing package that integrates with the RTS-Advantage software.

The following packages are included on the CD:

- Trial Version of the base platform for the RTS–Advantage Accounting System, version 4**
- Trial Versions of currently available Windows modules**
- X-Charge Credit Card Processing Interface**

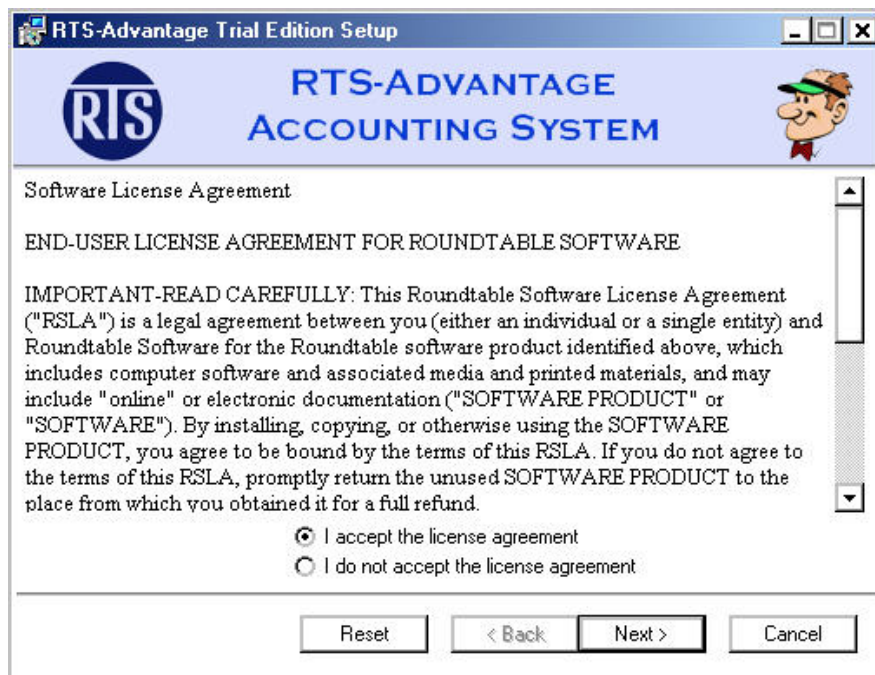
Installing the RTS–Advantage Accounting Software

The trial version of the software can be downloaded from:
<http://www.rtsadvantage.com/demos/v4v5Trial.exe>

Allow your browser to copy the file to your Desktop. After closing all other applications click the icon on your Desktop to begin the installation.

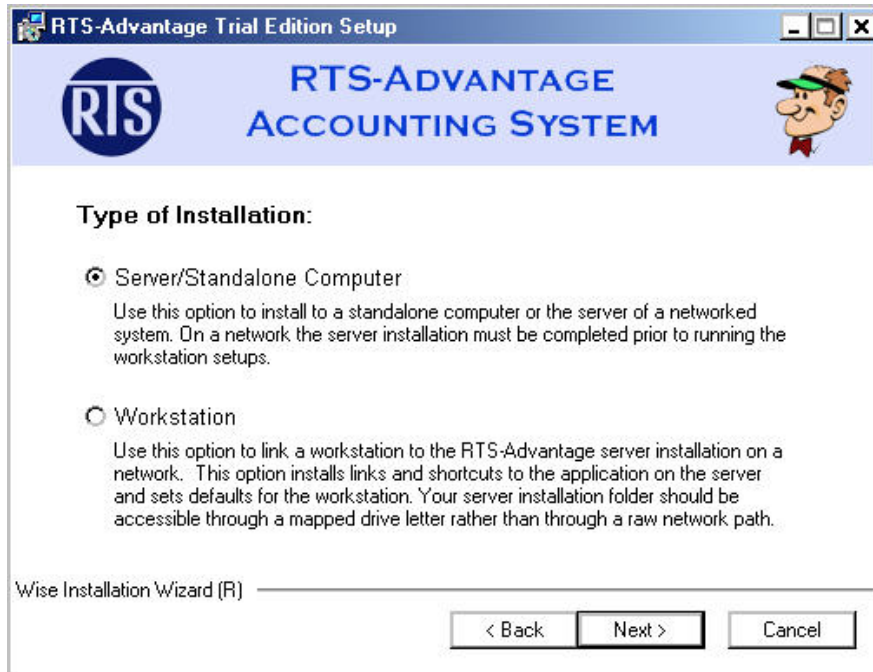
If you get a message about “Unknown Publisher” click Run to continue with the installation.

The Setup program will take a moment and then display the License Agreement screen:



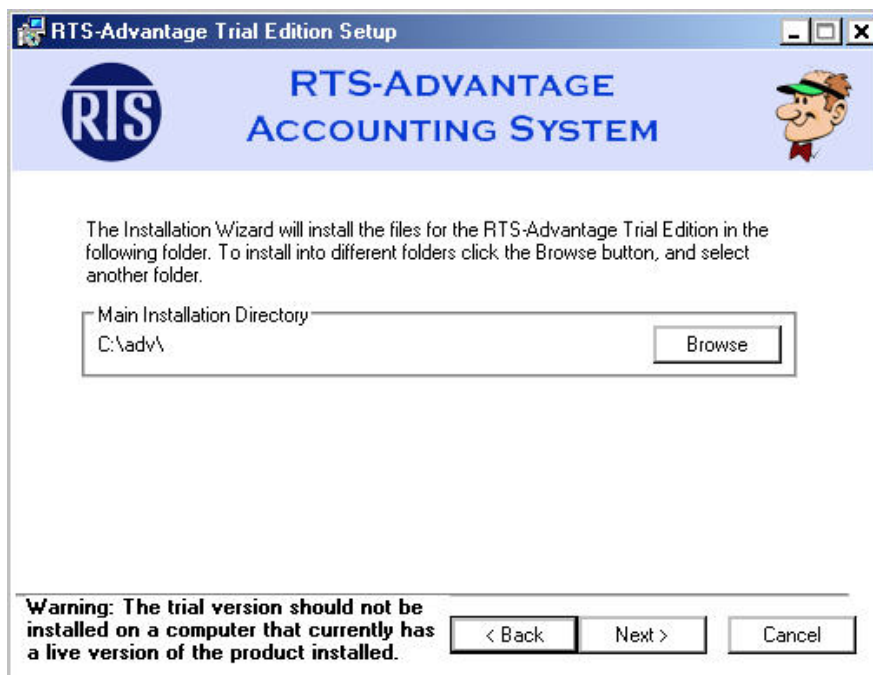
Read the Roundtable Software License Agreement. If you accept the terms of the agreement, select the Accept button and then click Next to continue. If you do not accept the license agreement, click Cancel to stop the installation process.

Installing On A Network Server Or Standalone Computer

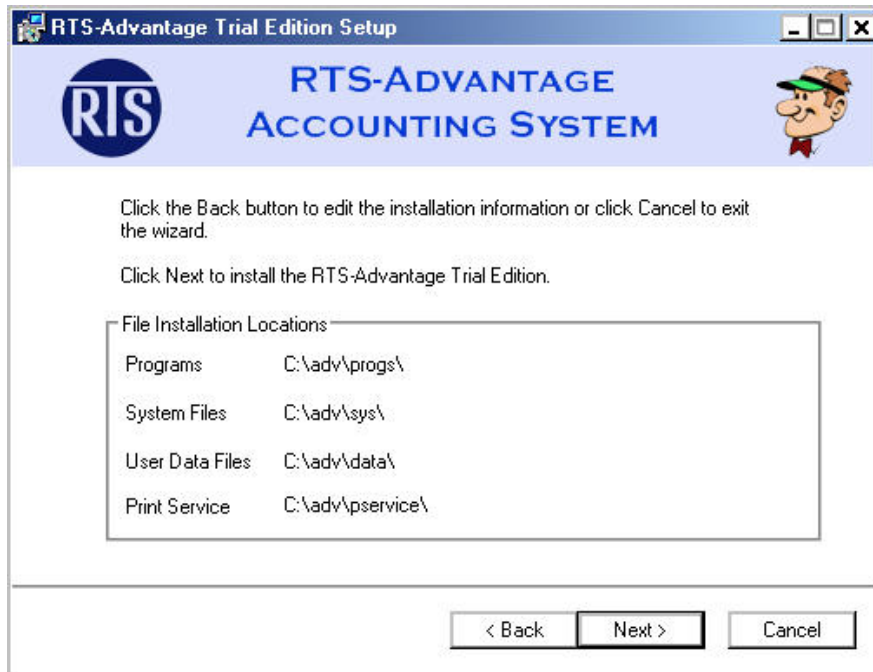


On the Type of Installation screen, choose the Server/Standalone option. (See page 4 for Workstation Installation instructions.) When used on a network, the software must be installed onto the server before the workstations.

On the next screen (below) you select the main folder on the server where the trial version files will be installed. The Installation program will create this main folder and four sub-folders below that. If you want to change the default, click the Browse button and enter your own folder. When ready to proceed, click the Next button.



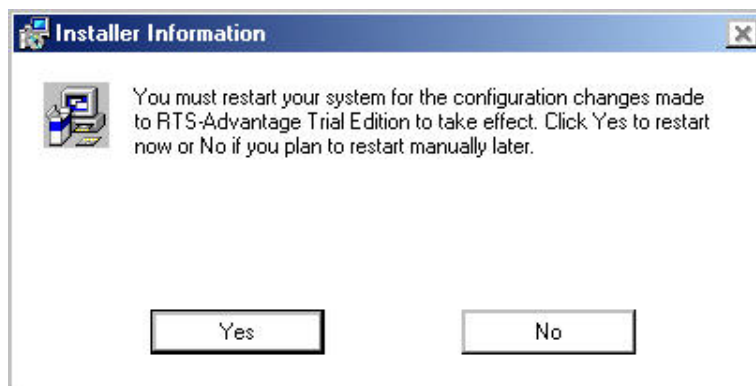
You then have the chance to review the four folders to which the trial version will install. If they are acceptable, click the Next button to proceed with the installation. If not, click the Back button to return to the previous screen to change the main folder or click Cancel to exit the install. We recommend you use the suggested folders unless you have a specific reason to change them.



Note To Vista Users: To avoid potential security conflicts do not specify any Windows system folders. Vista is reluctant to allow other programs to write and delete files from these folders.

The installation will now copy files to the folders previously specified. Be patient—there are quite a few files to transfer.

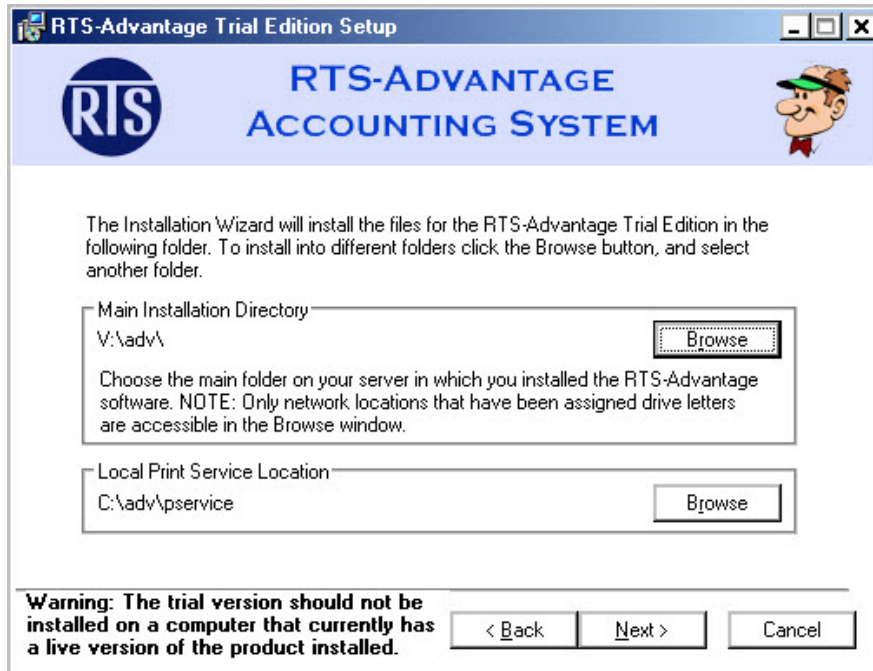
When the installation is complete, you are asked to reboot your computer. You can allow the setup to reboot the computer or select to reboot manually later. Rebooting is necessary to complete the installation process.



Installing On A Workstation

On the Type of Installation screen, choose the Workstation option. If you are installing onto a single user system or to a network server, refer to the instructions beginning on page 2. Because the workstation installation needs access to certain files on the server, the software must be installed onto the server before the workstations.

After specifying a Workstation installation, you select the Main Installation Directory on the server where the trial version files are installed. The Installation program will create icons on your local desktop that access the programs on your server. If you want to change the default folder, click the Browse button and enter your own directory.

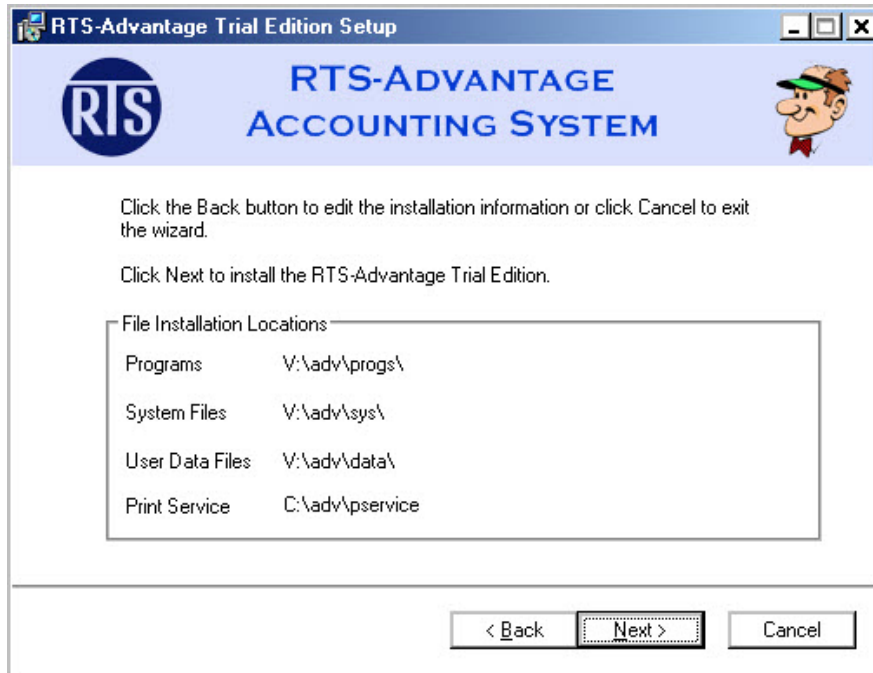


NOTE: For ease of use, we recommend that you assign a drive letter for the server on your workstation rather than specifying a network address here.

This screen also allows you to specify the local directory to be used by the Windows Printer Interface that our DOS product uses to access named Windows printers. To avoid conflicts with other users, this directory should be local to each workstation.

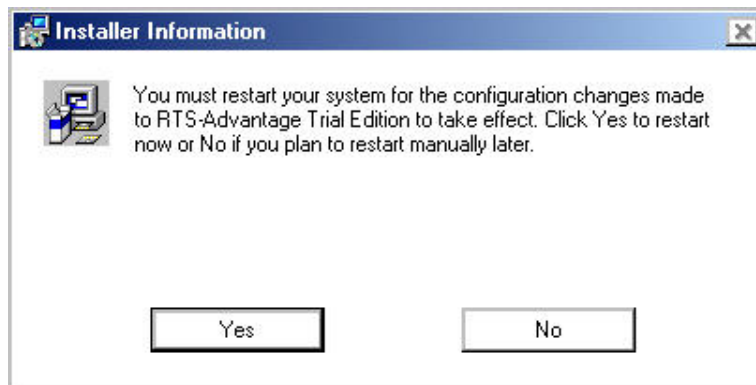
When ready to proceed, click the Next button.

You then have the chance to review the four directories that will be used by the Installation program. If they are acceptable, click the Next button to proceed with the installation. If not, click the Back button to return to the previous screen to make your changes or click Cancel to exit the install.



Note To Vista Users: To avoid potential security conflicts do not specify any Windows system folders. Vista is reluctant to allow other programs to write and delete files from these folders.

The installation program will now copy files to the directories specified previously.



When the installation is complete, you are asked to reboot your computer. You can allow the setup to reboot the computer or select to reboot manually later. Rebooting is necessary to finish the installation process.

Logging Into The Trial Version Of RTS-Advantage

The trial version of RTS-Advantage is now installed and ready to use. To run the DOS-based version 4 of the program click on the RTS-Advantage Accounting icon and then enter “demo” at both the login and password prompts.



*RTS-Advantage
Accounting*

LOGGING INTO VERSION 4

DOS Prompt - ADV

Roundtable Software Advantage Accounting System 4.0
DEALER DEMO VERSION ONLY-NOT FOR SALE 08/21/08

Demo Supervisor Login/Password = demo/demo

Login Password

Enter demo at both prompts, pressing Enter after each.

F1=Help Program = Advantage Accounting Main Menu
(c) 1999-2004 Roundtable Software DEMO VERSION

LOGGING INTO VERSION 5

Or, to run version 5—the Windows version—click on the Artie Windows icon and enter “demo” for both the Login and Password:



*RTS-Advantage
for Windows*

RTS-Advantage Login

Login: demo

Password: ●●●●

Login Exit

The default demo/demo login is filled in for you; simply click the Login button to access the version 5 Windows product.

Note that the version 4 platform can be accessed through the Windows menu. Simply expand any module and click on a program to open a command prompt with the version 4 program running.



Clicking Here

Opens This

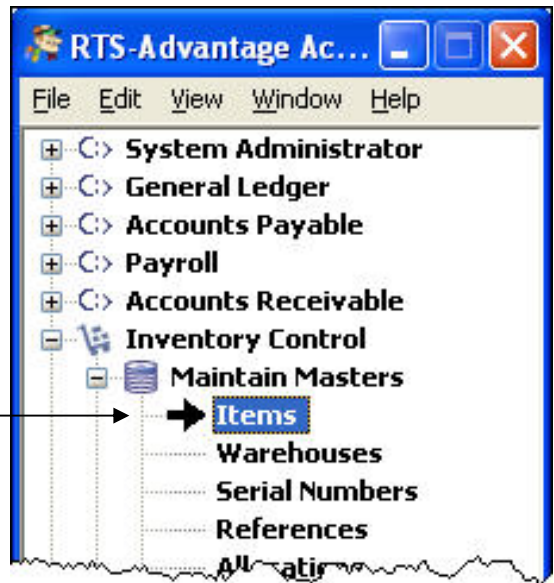
Add Edit Delete View Print RapidEntry Quit GoTo			
			06/23/08
COA Number			Last Period Balance
Description			Accumulated Balance
Account Type			Distribution Percent
Display Code			
Period	Period History	Period Budget	Accum History
1-July			
2-August			
3-September			
4-October			
5-November			
6-December			
7-January			
8-February			
9-March			
10-April			
11-May			
12-June			
F1=Help			
Program = GL01-Chart of Accounts Master			
Company = AA-Advantage Home Supply & Decor			



Remember!

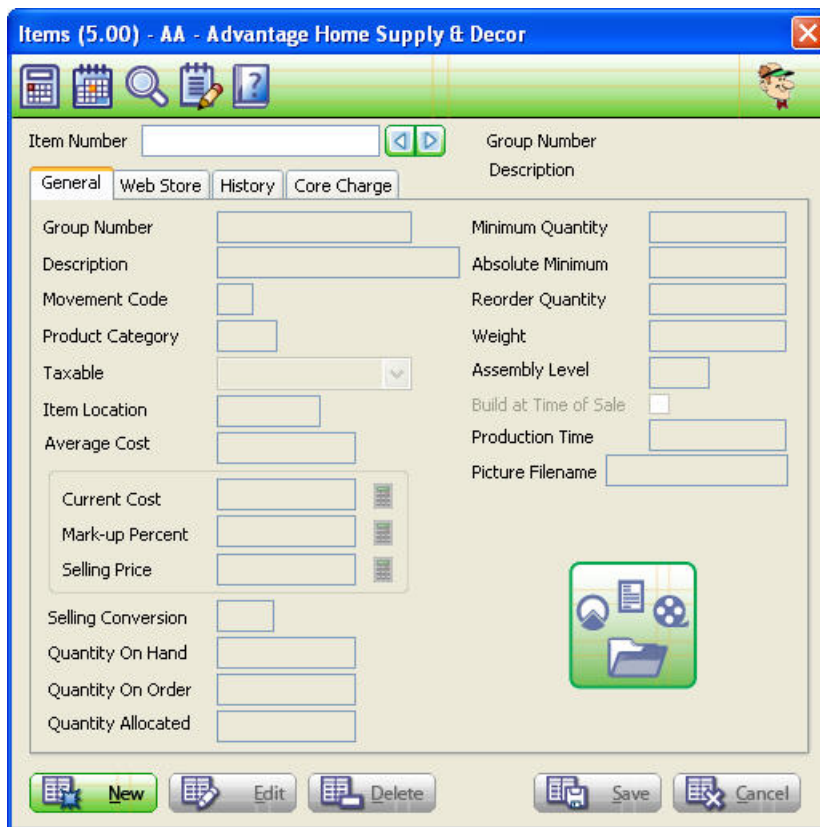
In DOS, press ENTER
 —not TAB—
 to accept input!

Any version 5 Windows modules currently available will have an icon, rather than a C:> before the module name. In this example, Inventory, having an icon, will access the version 5 Windows Inventory module while the modules above it, having the C:>, will access the version 4 product, as shown previously.



Clicking Here

Opens This



Using The Trial Version

The Roundtable Software Advantage Accounting System is a complete, full-featured, robust accounting package that meets and exceeds the needs of most small- to medium-sized businesses. While you are welcome to explore the software on your own, we know from years of experience that consulting with one of our qualified resellers is the best way to quickly learn how to utilize the software to enhance your day to day business operations. If you do not already have a reseller, please contact us for a referral.

Limitations of the Trial Version

Both the version 4 and version 5 trial versions are fully functional, but have some limitations. The trial version is designed to allow you to explore all the abilities of the product. If, after reviewing the products, you find it to be a good fit for your business, please contact one of our qualified resellers to purchase a version with the trial restrictions removed.

The version 4 trial product is limited by the following:

- Company files may not be expanded beyond their current sizes
- New companies may not be created
- All reports print the word DEMO along the left edge
- Cannot change the supervisor login (demo/demo)
- The trial version may not be current with the live product

The version 5 Windows trial product has the following constraints:

- "DEMO" watermark on all reports
- Demo Reminder that pops up before accessing any program

Uninstalling the Trial Version

When you are done exploring the software, you can uninstall the product by using the Windows Add/Remove Programs facility. Before running the uninstall, close our Windows Printer Service by right-clicking on the Artie icon in your tray and selecting the "Stop Print Interface" option.

The remainder of these instructions discusses the installation of X-Charge, a third-party package from CAM Commerce which interfaces with the Roundtable Software Advantage Accounting System to handle credit card processing.

Installing The X-Charge Software

Introduction

X-Charge from CAM Commerce Solutions provides you with a fast and secure credit card payment processing platform that can be used by any Windows-compatible personal computer. X-Charge can be seamlessly integrated with your RTS-Advantage Accounting System or it can be used as a stand-alone credit card processing terminal.

The RTS-Advantage distribution CD contains the latest version of the X-Charge software that you can load and explore. When you are ready to activate the credit card processing services, contact CAM Commerce at: 800-637-8268.

System Requirements

To use X-Charge with maximum efficiency, we recommend that your system and its hardware meet the following requirements:

System

- Must be running Windows 98, ME, NT 4.0, 2000 or XP

Hardware

- Processor: Pentium or greater
- RAM: 64 megabytes (MB) of application memory
- Hard Drive: Must have 2 MB of free disk space
- High Color (16 bit) (800 x 600 pixels) video display
- CD-ROM drive
- Modem: 14.4K or better with dedicated telephone line
- A printer

Optional Hardware

- Magnetic stripe credit card reader, 2 track
- 40 column receipt printer

X-Charge Software Installation

To install the X-Charge software:

1. Exit all Windows programs.
2. Place the CD in the CD drive. Left-click on the Windows Start button, then select and click on Run. Enter D:\XCSetup.exe (where D: is the letter of your CD drive) and press ENTER or click on the OK button.

The installation screen is used to install the X-Charge software, browse the CD, and to install Adobe Acrobat. Clicking on Browse CD displays the directory information where the CD files are stored. Clicking on Adobe Acrobat will install Adobe Acrobat Reader on your system which is required in order to access the on-line User Manual for X-Charge.

3. To continue with the software installation, click on Install X–Charge. The Welcome screen displays.
4. Review the Welcome screen information, then press ENTER or click on the Next button, The License Agreement screen displays.
5. Read the terms of the License Agreement carefully. Use the scroll bar on the right side of the window to view all of the agreement. If you accept the terms of the agreement, click on the Yes button. The Choose Destination Location screen displays.
NOTE: By default the software installs on you local hard drive. If you need to change the destination folder, click on the Browse button and make your selection.
6. Once the destination folder information is entered correctly, press ENTER or click on the Next button.
7. Review the Start Installation screen information, then press ENTER or click on the Next button to start the installation.
8. The Installing screen displays the progress of the installation.
9. Once the installation is complete, press ENTER or click on the Finish button to complete the installation and close the screen.

Integrating X–Charge with the RTS–Advantage Software

Within all modules of the RTS–Advantage Accounting System that accept payment there is a separate program, Merchant Services, in which you define how RTS–Advantage interfaces with the X–Charge software. The Merchant Services program allows you to toggle functionality such as whether to process refunds and voids and whether you are using the check guarantee feature.

When taking credit card payment with the merchant services interface active, RTS–Advantage pops up a window that asks for the card number (which can be swiped with a wedge reader that emulates keyboard input if the card is present) and other card data. This data is written to a text file that the X–Charge software reads and then contacts your processor to record the charge. The X–Charge software then writes a small text file that RTS–Advantage reads to determine if the charge was approved by your merchant services provider.

Refer to the manual for a specific module to read more about the Merchant Services program for that module.

X-Charge Documentation

The X–Charge User Manual is an on–line document that can be accessed from the Help menu throughout the X–Charge program screen. The manual is in PDF format and requires that you have Adobe Acrobat Reader 3.0 or above installed on your system to view and/or print the manual. A version of the Acrobat Reader program is included in the Utilities directory of the CD or can be downloaded from Adobe’s web site.

RTS–Advantage is an extremely powerful and detailed accounting system. If you do not already have a qualified dealer to help you set up and use this package, please contact us for referrals. We have dealers throughout the country who can help you get the most from this comprehensive package.



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