Sage Master Builder Installation and License Administration Guide

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Contents

Chapter 1: Welcome to Sage Master Builder Installation

Installation Overview

Welcome to Sage Master Builder installation

Welcome to Sage Master Builder installation. Sage Master Builder can run in many different software and network environments. Because of that, there are issues that you need to take into consideration for each one. The more information you can gain about the installation process and how it relates to your software and network environment, the more likely your installation will proceed smoothly.

To gain an understanding of what's new about product installation:

- Review the information in this book

- Review the latest QuickStart Installation Guide

- Read the letter from your business partner.

- Learn about the licensing process. Your Sage Master Builder license is managed by a the License Administration Tool and the Sage license server.

What information is in this book?

The rest of Chapter 1 "Welcome to Sage Master Builder Installation" provides more information about customer resources, such as:

- Other printed and printable guides

- The user-assistance Help system

- Contacts for Customer Support

- Sage Master Builder training

- Information about business partners.

Chapter 2, "System Requirements and Configuration" presents technical information about:

- System requirements for servers and client workstations

- Supported operating systems

- Special configurations for specific operating systems

Sage Master Builder will not run correctly or not run at all on computers that do not meet the minimum requirements, so before you install the software, be sure your computers meet the system requirements.

Chapter 3, "Sage Master Builder Installation," provides detailed information and instructions for installing Sage Master Builder software in different environments, such as:

- Single user

- Peer-to-peer

- Network

Chapter 4, "Managing Your License with the License Administration Tool," provides detailed information about:

- Setting the administrator password

- Managing and activating your license

- Creating group reservations

- Using the License Administration Tool.

Chapter 5, "License Use and Sage Master Builder," provides all the necessary details about:

- Specifying the Sage license server

- Managing license attributes

- Understanding license uses

- Running Sage Master Builder in a "connected" state

Chapter 6, "Special Configurations" contains information about special configurations for specific operating systems, such as

- Windows® 7 Professional and Windows Server 2008® R2 Standard

- Windows Vista® and Windows Server 2008

- Windows Server 2003®

- Windows XP® Professional

- Citrix® and Terminal Servers

Customer Support and Resources

Before you contact Customer Support

Before you decide to contact the customer support call center, there are many resources available to you. Our in-product Help system offers a comprehensive library of easy to find topics. Depending on your Sage service plan, we also offer a web-based Sage Knowledgebase and online user community forums. These

services are available 24 hours a day, seven days a week. Please see below for detailed information about all the resources available to you.

Sage Master Builder Help

You can access help about specific procedures, topics, fields, or buttons from anywhere in the software.

Sage Knowledgebase

Our staff maintains an extensive knowledge database of questions and answers covering everything from frequently asked questions to more complex problems and solutions. In addition, we keep all product reference documentation available in the Knowledgebase. This online tool is the same tool we use in our customer support call center to help answer your call. Depending on your Sage service plan, you can access this Knowledgebase at www.sagecre.com or through the in-product Help menu.

To access the Technical Support Knowledgebase:

1 Click https://customers.sagenorthamerica.com/irj/portal/anonymous/login.

2 On the Welcome page, in the left column, click **Knowledgebase Search** to open a list of products.

3 Complete **Step 1** by selecting Sage Master Builder from the list of products.

4 Complete **Step 2** by entering a search term in the box.

5 Click **Search**.

The search results appear below the box.

Technical Documentation Available on the Software CDs

A number of user guides are included on the software CDs we ship to you. Important release information such as system requirements, software

enhancements, and more can be accessed quickly and easily.

Sage Summit Customer Conference

Interact with and learn from Sage Construction and Real Estate senior leadership, product experts, and fellow customers in one location. Get the latest information on product updates as well as network and share experiences with your peers. Check our website for current conference information.

Prepare to contact Customer Support

Depending on your Sage service plan, you may be able to contact the Sage Customer Support Call Center to work with one of our highly trained, customer support professionals. Before you call, here is a quick reference list of questions we will often ask to help resolve your question. Prepare your answers to these questions before calling Sage Customer Support to save you time when calling us.

Question	How to Find the Answer
What is your Sage client ID number?	Your client ID number can be found on correspondence you receive from Sage. If you do not know your Sage client ID, please contact the person at your company who maintains your relationship with Sage.
What CD version are you using?	To find the version, open Sage Master Builder; click **Help > About Sage Master Builder** and note the number listed.
What application or area in the software are you calling about?	On the menu list, identify the application and number where are you are work (i.e. Selecting Invoices to Pay in 4-3-1, Accounts Payable Vendor Payments).

Question	How to Find the Answer
How can we help you?	Walk through the exact steps you completed with as much detail and accuracy as possible.
Is there an error message?	Write down the exact wording of the message.
Can you reproduce the issue?	Were you able to walk through the same steps that led to the problem and see whether it happened again?
Is this the first time the problem has happened? Does the problem occur on one workstation or several?	Ask other users if they have experienced the same problem. Have them test at their workstation to see if they experience the same problem. Also, have the original user try other workstations to see whether the problem is specific to that user.
Has anything changed with your software, hardware, or workflow?	Ask your network administrator for technical information regarding anything that may have changed behind the scenes: upgrades to Sage Master Builder, new third-party software installations, moving of data from one server to another, new printers or print driver installation, or anything else that might affect the network.
Does the problem happen in the sample data sets?	Select [File> Open Company], then change the drive letter on the dropdown to C:, select Sample Company.
What kind of network are you using?	If you do not know, please contact your network administrator.

Question	How to Find the Answer
What operating system is on your computer?	For XP: Click **[Start]**, click **[Run]**, type winver and click **[OK]**. For Vista: Click **[Start]**, type winver in the 'start search' window and click **[OK]**.
What printers and print drivers are installed?	If you do not know, please contact your network administrator.
When was your last backup?	If you do not know, please contact your network administrator.

Customer Support Call Responses

Our goal is to answer all calls within the first three minutes, but more often than not we answer your call on the first ring! Once calls are answered, our support analysts resolve over 90% of questions during the first contact. They work with you to identify call urgency and respond accordingly. Call urgencies range from a simple explanation of software settings to critical situations in which work is stopped or data integrity is compromised. If a call is unable to be resolved immediately, the support analyst will work with you based on the urgency to take the appropriate action. Some calls may warrant further research and follow up, in which case our support analyst will place your call in his/her in-progress work list. At every step of the way, we work with you to until a resolution or agreement can be reached!

Depending on your Sage Service plan, if you have an open support ticket, you may check the status or update, or even create a new support ticket online? Just visit www.sagecre.com and click Sage customer website under the Support Logon. Next, select the Support tab and choose the Self Service button.

You may check the status of an open support ticket, update new information you've discovered on an open issue, or create a non-urgent request for help online. Just visit www.sagecre.com and click Logon. Next, select the Support tab and choose the Self Service button.

Contact Customer Support

Contact Customer Support in the United States and Canada at: www.sagecre.com

Sage Master Builder toll free: 800-866-8049

International: 503-690-6775

Customer Support Hours

Telephone support is available Monday through Friday from 6 a.m. to 5 p.m. Pacific Time with the exceptions listed below. Online support incidents can be submitted 24 hours a day, seven days a week by logging on to https://customers.sagenorthamerica.com/irj/portal/anonymous/login. Our customer support team will reply to your questions during normal support hours.

- Every Thursday from 2 p.m. to 3 p.m. Pacific Time, closed for staff meetings.
- Standard United States holidays.
- Quarterly company meetings.

Any additional closures will be communicated via our regular customer email newsletters.

Training Resources

About training options

Learning to use Sage Master Builder software has never been easier! Whether you choose to take online classes from Sage, participate in classroom training, or work directly with your business partner, you will learn how to use Sage Master Builder to support your business. Contact your business partner to find out about training options or visit www.sageu.com/masterbuilder.

Overview of customer classes

Online classes help make learning Sage Master Builder convenient. Each instructor has years of experience using Sage Master Builder and will lead you step-by-step through the class material.

Online classes allow you to view the instructor's computer screen as he or she demonstrates Sage Master Builder software. Once you register for your class via Sage University, you will receive email communications that tell you how to access the training. Because the classes are live, you can ask questions and benefit from hearing other students' questions. Classes cover all aspects of Sage Master Builder, including project management, estimating, scheduling, and payroll. For more information, visit www.sageu.com/masterbuilder.

Getting started with training

All customers should begin with our New Customer Training (NCT) series, which is included in our Essentials Training Package in recorded format for 24/7 access. These classes include an overview of the Sage Master Builder system and its features. Customers that prefer live online training can register for the Realtime Learning version of these NCT courses. For more information, visit:

www.sageu.com/masterbuilder

Business Partners

About Business Partners

To serve you better, Sage Master Builder products and services are available to you through an authorized network of business partners.

Your business partner is available to serve you, from simple how-to questions and hands-on demonstrations, to installation, implementation, and training. They're fully equipped to help you get where you want to be. For more information, please contact your Sage Master Builder business partner.

Business Forms

Sage Construction and Real Estate Forms

Sage Master Builder is designed to work with generic checks and forms that are available from many sources. There is no single vendor that customers must use; however, you can get a complete portfolio of forms, tax forms, and checks through *Sage Construction and Real Estate Forms* by calling 800-760-7929 or by visiting www.sagecreforms.biz.

Chapter 2: System Requirements and Configuration

Internet access recommended for Sage Master Builder

Sage Master Builder features such as printing or efiling W-2s or 1099s, submitting enhancement requests, or downloading periodic product or tax updates require Internet access. As we continue to update the Sage Master Builder product, there will be additional features which will also require Internet access. To take advantage of these features, please ensure any workstation or server that Sage Master Builder is installed on has access to the Internet.

Hardware Requirements

About system requirements and configuration

This section provides information about system requirements along with general and specific configuration.

More information about system requirements and configuration is available in the *Sage Master Builder Installation and License Administration Guide*.

About the Sage System Verifier

The Sage System Verifier utility assists with troubleshooting hardware issues related to the Sage licensing component. To locate the Sage System Verifier:

Start > **All Programs** > **Sage** > **Sage System Verifier**.

Server hardware specifications

We cannot recommend server hardware specifications for your network, as this depends on your specific requirements, such as the number of users on your network, or other programs that might use server resources, such as firewalls, software applications, mail systems, and so forth. We can, however, recommend a set of minimum hardware requirements.

Server hardware requirements

The following table shows the operating systems that are supported for the server computers running Sage Master Builder.

Caution!

The minimum processor requirements for servers listed in the table below are based on the Microsoft® Windows® Server 2003® operating system family. When updating or purchasing servers running newer operating systems such as Windows Server 2008®, Small Business Server® 2008, and Server 2008 R2 Standard, we recommended that you also refer to Microsoft system requirements.

Hardware	Minimum	Recommended
Processor	Intel® Pentium® 4 or comparable	Intel® Dual Core/Quad Core™ or comparable, 2 GHz+
RAM	2 GB	4 GB+
Free Disk Space	3.5 GB	3.5 GB+
CD-ROM Drive	2X CD-ROM	24X CD-ROM+
Printers	For highest quality printing, we recommend laser or inkjet printers.	

IMPORTANT: These minimum recommendations include

370 MB of hard disk drive space required for running
Microsoft .NET Framework 3. 5 Service Pack 1 software.

Client and workstation hardware requirements

The following table shows the hardware requirements for client and workstation
computers running Sage Master Builder.

Hardware	Minimum	Recommended
Processor (except Vista/Windows 7)	Pentium 4 or comparable	Intel Dual Core or comparable
Vista/Windows 7 processor	1 GHz	2 GHz+
RAM (except Vista/Windows 7)	1GB	2 GB+
Vista/Windows 7 workstation RAM	2 GB	4 GB+
Free Disk Space	1 GB	3 GB+
CD-ROM Drive	2X CD-ROM	2X CD-ROM+
Printers	For highest quality printing, we recommend laser or inkjet printers.	

NOTE: These minimum recommendations include the 230 MB
required for running Microsoft .NET Framework 3.5 Service
Pack 1 software on client workstations. The recommended free
disk space is based on the installation of a single program and
the average size of a Sage Master Builder company database.
Allow at least 50 MB for each additional company database
that you create.

Operating Systems Requirements

Operating systems

We recommend that the following issues be taken into account for a smooth and successful installation experience.

Supported Operating Systems

Server, 32 and 64-bit Operating Systems	Client/Workstation, 32 and 64-bit Operating Systems
Microsoft Windows Server 2008® R2 Standard	Microsoft Windows 7 Professional
Microsoft Small Business Server 2008®	Microsoft Windows Vista Business
Microsoft Windows Server 2008	Microsoft Windows XP® Professional (SP 2 or newer)
Microsoft Windows Server 2003®	
Microsoft Windows Small Business Server 2003® (SP 1 or newer)	

Unsupported Operating Systems

Caution!

Sage Master Builder and/or its components do not run on or do not support some operating systems. Do not install Sage Master Builder to computers running these Microsoft Windows operating systems:

- Microsoft Windows 95®
- Microsoft Windows 98®
- Microsoft Windows NT® Server
- Microsoft Windows NT Workstation
- Microsoft Windows 2000®
- Microsoft Windows 2000 Server®
- Microsoft Windows XP Home ®
- Microsoft Windows Vista Home Basic
- Microsoft Windows Vista Home Premium

IMPORTANT: Microsoft .NET Framework 3.5 Service Pack 1 must be installed to all computers running Sage Master Builder and the License Administration Tool. During installation, Microsoft .NET Framework 3.5 Service Pack 1 is installed on your computer automatically if it is not already installed. Be sure that all server and client computers meet both .NET Framework requirements and Sage Master Builder requirements.

NOTE: When you have a network with three or more users, a dedicated file server increases performance and reliability.

Supported Microsoft Office versions

The following table shows which versions of Microsoft Office are supported in Sage Master Builder.

Supported Microsoft Office Versions
Microsoft Office 2003
Microsoft Office 2007
Microsoft Office 2010

Web browser requirements

Web browser requirements and recommendations are:

Minimum
Microsoft Internet Explorer$^{®}$ 6.0, Service Pack 1 or later

Network Configuration Requirements

Server network configuration requirements

The following table shows the server network configuration requirements for server computers running Sage Master Builder.

> NOTE: Sage Master Builder typically runs in a local area network (LAN) environment. Sage Master Builder can run in a wide area network (WAN) using Citrix or Terminal Services. Contact your business partner for more information.

Process	Required
Network Protocol	TCP/IP
Minimum Network Speed - LAN	10/100/1000 Mbps

Process	Required
Minimum Network Speed - WAN	+/- 1.5 Mbps receiving data (downstream) +/- 384 Kbps sending data (upstream)

Client and workstation network configuration

The following table shows the server network configuration requirements for client and workstation computers running Sage Master Builder.

Process	Required
Network Protocol	TCP/IP
Minimum Network Speed - LAN	10/100/1000 Mbps
Minimum Network Speed - WAN	128 Kbps Broadband

NOTE: For information about running Sage Master Builder in a wide area network (WAN) using Citrix and Terminal Services, contact your business partner.

About network configuration and TCP Remoting Channel

Sage Master Builder uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. Certain configurations can potentially disable the communication:

- File sharing on computers running the Windows 7, Vista, Server 2008, and Server 2008 R2 operating system must be enabled. To enable file sharing, follow the instructions in the Windows 7/Vista/Server 2008 Help.

- TCP communication requires the selection of port numbers that are not in use by other processes on the local computer.

■ Software firewalls running on the local computer can be configured to block processes from opening TCP ports, which will prevent communication through the TCP Remoting Channel.

Configuring Sage Service Host TCP port numbers

By default, the Sage Serve Host uses the TCP port numbers 8103 and 8104. These numbers can be configured using an XML file, Sage.SMB.xml, located under:

\Documents and Settings\All Users\Application Data\Sage\LS1\ServiceHost\1.1\Configuration.

If you need to change the default port numbers for the Sage Service Host using the Sage.SMB.xml file, you must change it on every computer on the network where Sage Master Builder is installed. In addition, after making this change, the Sage Service Host on each computer running Sage Master Builder must be restarted.

NOTE: Consult with your IT administrator for alternative port numbers.

To change the port numbers:

1 In Window Explorer, locate the Sage.SMB.xml under this path:
\Documents and Settings\All Users\Application Data\Sage\LS1\ServiceHost\1.1\Configuration.

2 Right-click Sage.SMB.xml, and open it with a text editor, such as Notepad.

3 Near the end of the file between the **<Remoting> </Remoting>** tags, locate the port numbers and change them.

4 Save and close the file.

5 Repeat steps 1-4 on every computer running Sage Master Builder.

Configuring third-party firewalls

During installation of the Sage Service Host, the Windows Firewall is configured automatically to allow the Sage Service Host to act as a TCP server. If you use some other firewall, however, you may need to manually adjust some settings in the firewall in order to ensure proper operation.

You can use the following basic procedure to manually configure the Windows Firewall to allow the Sage Service Host to communicate with other computers. Use it as the basis for manually configuring other third-party firewall products.

To configure the Windows Firewall:

1 **Click Start > Control Panel > Security Center** (XP) or **Security** (Vista/Server 2008) or **System and Security** (Windows 7).

2 Open **Windows Firewall**, and select the **Exceptions** tab (XP) or **Allow a program or feature through Windows Firewall** (Vista, Windows 7, and Server 2008).

3 If Sage Service Host is not on the list, then you can add it by selecting **Add Program**, then browsing to the following path:
\Program Files\Common Files\Sage\LS1\ServiceHost\1.1\Sage.LS1.ServiceHost.exe.

NOTE: By default, the exception is set to allow access by any computer on the network. If desired, you can refine this setting by selecting the **Change Scope** button. Be aware that restricting the scope incorrectly can cause the computer to be unable to connect with some or all of the other machines on the network.

Microsoft .NET Framework 3.5 Service Pack 1 Requirements

About installation and Microsoft .NET Framework

When you install Sage Master Builder software, you will also install the Microsoft .NET Framework 3.5 Service Pack 1, if it is not already installed. It is important that you make sure that both your client and server computers meet the minimum

requirements for installing both Sage Master Builder software and Microsoft .NET Framework 3.5 Service Pack 1.

Important:

If the Sage Master Builder installation requires an installation of Microsoft .NET Framework 3.5 Service Pack 1, the Sage Master Builder installation process may continue automatically after the .NET Framework installation is completed. If you are prompted to restart your computer after the .NET Framework installation, however, you must do it to continue the Sage Master Builder installation.

About installing .NET Framework 3.5 Service Pack 1 and Operating Systems

NOTE: If Microsoft .NET Framework 3.5 Service Pack 1 is not already installed on your computers, then that installation alone may take up to 20 minutes per computer.

The following are the supported operating systems for .NET Framework 3.5 Service Pack 1:

- Windows 7 Professional

- Windows Server 2008 R2 Standard

- Windows Vista Business

- Windows Server 2008

- Windows Server 2003

- Windows XP Professional

Viewing and verifying system information

You may use the **winmsd.exe** to open the **System Information** window to view a list of your system information. The winmsd.exe program is not available with the Windows Vista Business operating system.

To view and verify system information:

1 Click **[Start]**, the click **[Run]**.

2 The **[Run]** dialog box opens.

3 In the **[Open]** text box, type **winmsd.exe**, and then press the Enter key.

The **System Information** window opens displaying a list of your system information.

.NET Framework Requirements for Server Computers

Minimum requirements for Microsoft .NET Framework Service Pack 1 on servers

Component	Required
Hard disk space at installation	800 MB
Hard disk space to run	370 MB
Video card	800x600, 256 colors

.NET Requirements for Client Computers

Component	Required
Hard disk space at installation	160 MB
Hard disk space to run	70 MB
Video card	800x600, 256 colors

Minimum requirements for the Microsoft .NET Framework 3.5 Service Pack 1 on clients

Component	Required
Hard disk space at installation	160 MB
Hard disk space to run	70 MB
Video card	800x600, 256 colors

Verifying that Microsoft Internet Explorer 6.0 Service Pack 1 is installed

You must have Microsoft Internet Explorer 6.0 Service Pack 1 installed to client computers to meet minimum requirements for running Sage Master Builder software. This is also a requirement for Microsoft .NET Framework 3.5 Service Pack 1.

To verify that Microsoft Internet Explorer 6.0 Service Pack 1 is installed:

1 Launch Internet Explorer.

2 On the Internet Explorer **Help** menu, click **[About]**.

3 In the **About Internet Explorer** dialog box, verify that the version number is 6.0 Service Pack 1 or later, and then click **[OK]**.

Note: To download Service Pack 1 for of Microsoft Internet Explorer 6.0, visit the following Microsoft Web site:
http://www.microsoft.com/windows/ie/ie6/downloads/critical/ie6sp1/default.mspx

Report Scheduling and Faxing Functionality

About setting up emailing and faxing through Sage Master Builder

Using the faxing functionality through the Sage Master Builder program requires:

- Installation of the Windows operating system Fax Service component

- A separate installation and setup of a fax modem in your workstation

- Access to an analog phone line.

In addition, you will also have to set up the cover page information and the number of times that the fax re-tries to send.

For more information about installing and setting up your fax modem, refer to the documentation that came with your fax modem. Sage Master Builder does not provide support for installing or setting up a fax modem.

For more information about installing the Window operating system Fax Service component, see Installing the Window Fax Services component.

Upgrade to Adobe Reader version 8.1.3

Adobe Reader Version 8.1.3 supports faxing from Windows. To fax from Sage Master Builder, you should download and install 8.1.3 or higher.

> IMPORTANT: Customers have reported problems faxing
> from Sage Master Builder with versions earlier than 8.1.3.
> This version is available from
> http://get.adobe.com/reader/otherversions/

Disengage automatic updating for Adobe Reader

If you are using the scheduling capability for sending faxes, we recommend that you disengage the automatic "check for updates" capability of Acrobat Reader as it will prevent scheduled reports from completing.

> NOTE: Instructions disengaging automatic "check for updates"
> differ from version to version of Adobe Reader. Refer to the
> Adobe Reader Help for instructions.

Report Scheduling and Email Functionality

> IMPORTANT: Using the email capability of Sage Master
> Builder requires access to a simple mail transfer protocol
> (SMTP) email server. This server may be located on your
> workstation PC, on a server on your company's network, or
> at your Internet service provider (ISP). If the email server is
> local, you may need the assistance of an IT professional to
> properly identify or set up this capability. If the email server
> is located at your ISP, you may need contact your ISP for
> assistance.

Using the ISP's simple mail transfer protocol (SMTP) server to send email via
Sage Master Builder typically requires "user authentication" at the STMP server.
An example of an SMTP email server name is smtp.att.sbcglobal.net.

Different ISPs may use different terms when referring to user authentication. In
general, however, user authentication means verifying a user's identity by means
of a "user name" and "password."

In the context of sending email through Sage Master Builder using an ISP's
SMTP server, user authentication only refers to verifying the user's identity at the
ISP's SMTP server. It does not refer to your:

- Sage Master Builder user name and password

- Network domain user name and password

- Windows system user name and password.

> NOTE: We do not provide support for setting up or installing an
> email server. You set up user authentication and your fax line
> access dial out number on **7-2 Company Information**.

Installing the Windows Fax Services component

To fax from Sage Master Builder, you must install the Windows Fax Services component.

To install the Window Fax Services component (XP):

1 Open the Window **Control Panel**.

2 On the **Control Panel** window, double-click **Add or Remove Programs**.

3 On the **Add or Remove Programs** window in the left column, click the **Add/Remove Windows Components** icon.

4 On the **Windows Components Wizard** window, select the **Fax Services** check box, and clear all the other check boxes.

5 Click **Next**, and follow the instructions on the screen.

To install the Window Fax Services component (Vista):

1 Click **Start > Control Panel** > **Programs** > **Turn Windows features on or off**.

2 On the **Windows Features** window, locate the **Windows fax and scan** check box, then select it.

3 Click **[OK]**.

To install the Window Fax Services component (Windows 7):

1 Click **Start > Control Panel** > **Programs** > **Turn Windows features on or off**.

2 On the **Windows Features** window, locate **Print and Document Services**, then click on the **Windows fax and scan** check box.

3 Click **[OK]**.

Sage Master Builder API

System requirements for Sage Master Builder API

If you are using the Sage Master Builder API, the minimum and recommended system requirements may vary. These requirements must be considered in addition to the recommended system requirements for running Sage Master Builder.

It may be necessary to increase the processor speed, memory and/or disk space of your system depending upon the requirements of the third-party application using the API. Please consult with your third-party vendor to determine what changes, if any, should be made to your hardware configuration in order to meet your desired performance criteria.

Chapter 3: Sage Master Builder Installation

Installation Preview

Pre-installation information for new customers

Implementing and running your business in Sage Master Builder must be thoroughly planned out in advance to harness the power of this software. Your existing company data must be migrated before you start working in the program. Your business partner can assist you with a data migration and business implementation plan. For more information about implementing Sage Master Builder for your company, see the information about business partners in Chapter 1 of this guide.

We recommend that you take full advantage of all the knowledge and advice found in Sage Master Builder documentation and training classes. We also recommend that you work with your business partner and accounting professionals before you begin to implement this software for your business.

We strongly recommend that you install the Sage license server on a computer that is always available to other computers on your network that are running Sage Master Builder.

Pre-installation information for existing customers

Because existing customers are working with company information and possibly with scheduled reports, please review these important points before you start to install the program.

> IMPORTANT: Before you install, make at least one backup copy, but consider making two backup copies of your existing company data for an extra margin of safety.

Duration of the installation process

Plan on at least five and possibly up to 20 minutes per computer to install Sage Master Builder and its companion software, such as the Sample Company and the License Administration Tool. The duration of the Sage Master Builder installation depends a great deal upon each computer's configuration. For example, some newer computers are pre-installed with essential software required to run Sage Master Builder software such as the .NET Framework 3.5 Service Pack 1. Installation to older computers may take more time.

Additional required software

Microsoft .NET Framework 3.5 Service Pack 1 must be installed on all computers running Sage Master Builder software. The installer determines if the .NET Framework 3.5 Service Pack 1 is already installed. If not, the installer installs the required software automatically.

Plan for an additional 10 to 15 minutes per computer to install .NET Framework 3.5 Service Pack 1.

NOTE: It is very important that you understand the network environments and operating systems on the computers and server computers where you install Sage Master Builder software. Chapter 6 Special Configurations provides detailed information about installing to different environments.

About installing the Sage Master Builder software to different configurations

You can install Sage Master Builder software to many different configurations, for example, stand-alone, network server, Citrix and Terminal Services servers, peer-to-peer, and workstations.

> IMPORTANT: The optimal operational size of a peer-to-peer network running Sage Master Builder is two to five workstations. Additional workstations may adversely impact Sage Master Builder response times. Networks consisting of more than five (5) workstations may need to use one computer as a dedicated server.

Sage Master Builder allows users to share data and reports stored on a network hard drive. From different workstations, users can then access the server to share one set of data, one set of reports, and one set of report forms.

During installation, the installer checks for the components necessary to run Sage Master Builder and then copies the program modules and reports to the \MB7 folder and subfolders that are created on the hard disk. In addition, the installation process copies system files necessary for program operations to the Windows and Windows System folders.

The installation process does not make any configuration changes to the computer. After installation is complete, you must configure the stand-alone computer, server computer, or workstation for optimal performance. For example, you need to configure the date format on computers running the Windows Server 2003 operating system. For detailed information about configuring each server and workstation depending on its operating system, see Chapter 6, Special Configurations.

Connectivity across your network

For all client workstations running the program to be connected to your company data, they must all be connected to the Sage license sever. If one user sees the "unable to connect" message when all other people are connected, then you know that the connectivity problem is limited to that one person. If you encounter a hardware failure with your server, then all the people running Sage Master Builder will be disconnected.

License Administration Tool

Installing Sage Master Builder also installs the License Administration Tool, a Sage licensing application. You can log on to the tool from any computer on the network see who is using the program in "read-only" mode. In addition, the administrator for the License Administration Tool can log on in "administrator" mode to work with such tasks as activating your license and registering new modules.

Option to update reports and report forms on a shared drive during installation

If you are running Sage Master Builder in a network environment, this option enables you to update shared system reports and report forms located on a network drive during installation. You no longer have to run the installation twice. When you select this option, the installation process enables a list of network drives that already have an \MB7 folder.

> IMPORTANT: This option only updates system reports and report form files. It does not perform a complete installation. If you need to be able to run Sage Master Builder on the targeted server or the server's licensing needs to be updated, you must do a complete installation directly on the server.

Installing the Sample Company

The Sample Company provides the means for viewing and working with sample data in Sage Master Builder windows. There are sample accounts, sample employees, sample takeoffs, and much more. By viewing and working with this sample data, you can gain an understanding of how different windows interact with the sample data when managing a construction business with Sage Master Builder.

Sage Master Builder master trainers use the Sample Company extensively during Sage Master Builder training classes. We highly recommend that you load the Sample Company during your initial installation.

You can log on to the Sample Company using "Supervisor" as the user name. You do not need a password.

The Sample Company:

- Allows you a safe way to try out new functions as you learn them.

- Is used in many on-line and recorded classes.

- Provides samples of many Sage Master Builder forms that are all filled in. This makes it easy to understand many concepts.

- Provides starter lists for many values you'll need to set up: cost codes, cost types, tasks, client status, client type, employee positions, paygroups, etc.

- Provides you with live data to investigate the content of Sage Master Builder reports.

- Takes very little space on your hard disk drive.

Installing the Sample Company overwrites any previous installations of the Sample Company. If you have made changes in your Sample Company that you wish to keep, rename this folder before installing a fresh copy of the Sample Company.

New Installations

About new installations

A new installation is defined as:

- Installing the software on a computer that has never had Sage Master Builder installed on it before.

- Installing the software on a computer where Sage Master Builder and Sage Licensing has been removed using Control Panel > Add or Remove Programs.

NOTE: Instructions for reinstallation/upgrade installation over an existing installation are different. See Upgrade Pre-installation.

You must designate one computer on your network as the Sage license server. This server will manage use of Sage Master Builder; for example, the number of people who can use Sage Master Builder simultaneously on your network. You will need to install the software on this computer first and then activate your licenses before installing Sage Master Builder on your other computers.

The installation package of files is the same whether it is available to you on a CD or in a folder on a network drive.

There are two ways to install the program:

- You can install Sage Master Builder from the product CD at each computer.

- You can copy the entire CD (all files and folder) to a folder that you create on a network drive and then install to each client workstation by launching the installation from that network folder from that client workstation.

No matter which installation method you use, we recommend that you install to the Sage license server computer first. Then when you install the program to your workstations, you can set up Sage Master Builder to find the Sage license server and run the program using your license.

The installation process also presents different installation windows depending on whether you are installing the Sage license server and Sage Master Builder or you are just installing Sage Master Builder by itself.

Basic steps for new installations are:

1 First install the program on your network server, the computer where all your company data is located. You do this only once on your network. Remember to write down the Sage license server computer's IP Address and/or computer name, which is displayed at the end of the installation.

2 Next, activate your license.

3 Install the program to all client workstations on your network.

4 From each client workstation, specify the Sage license server.

IMPORTANT: Always start installing the program at the computer that will be your Sage license server, which is likely to be your network server.

Installing Sage Master Builder on client workstations

Find your installation method below, either CD or network folder, and follow the installation instructions.

To install Sage Master Builder only from a CD:

1 Close all open programs except for firewall and antivirus programs.

2 Insert the Sage Master Builder CD into your CD-ROM drive.

3 If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select setup.exe. Then click **[OK]**.

4 Read the instructions on the installation welcome window, and click **[Next]**.

5 On the installation option window, select the option This computer will run Sage Master Builder only, and click **[Next]**.

6 On the license agreement window, read the License Agreement carefully.

7 Select the check box to accept the terms, then click **[Next]**to continue the installation.

8 The select a drive window appears.

9 Select a local drive location for the installation, and click **[Next]**.

The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1 installed. If this program is not found, the installer installs it.

On the select additional options window:

a Install the Sample Company for training purposes. We recommend that you install the Sample Company.

b Update reports and report forms on a local or network drive. This does not install the entire Sage Master Builder program on the other drive. It only updates the system reports and report forms.

NOTE: This option may not appear for first-time installations because it is unlikely that a shared \MB7 folder already exists on your network.

The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1 installed. If this program is not found, the installer installs it.

NOTE: If the install program does not start automatically, go to **Start > Run > Browse**. Locate your CD drive or CD image folder, select setup.exe, and then click **[OK]**. If your computer security warns you that Sage Licensing is trying to access the Internet, click **[Allow]**.

An installation complete window appears. The Launch Sage Master Builder check box is preselected so that you can launch Sage Master Builder and specify the Sage license server.

Read the important message and follow the instructions to launch Sage Master Builder.

Click **[Finish]**.

Master Builder begins its launch process by displaying the Specify Sage License Server window.

For more information about this process, you can click the Help button on the Specify Sage License Server, or see Chapter 5 License Use and Sage Master Builder.

To install Sage Master Builder only from a CD image in a network folder:

1 Close all open programs except for firewall and anti-virus programs.

2 On a network drive, create a folder named, for example, Master Builder 16 CD Image.

3 Copy the entire contents of the CD (all files and folders) to that folder.

4 In the folder that you have created, locate the setup.exe file and double-click it.

5 Read the instructions on the installation welcome window, and click **[Next]**.

6 On the installation option window, select the option This computer will run Sage Master Builder only, and click **[Next]**.

7 On the license agreement window, read the License Agreement carefully.

8 Select the check box to accept the terms, then click **[Next]**to continue the installation.

9 The select a drive window appears.

Select a local drive location for the installation, and click **[Next]**.

The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1. If this program is not found, the installer installs it.

On the select additional options window:

a Install the Sample Company for training purposes. We recommend that you install the Sample Company.

b Update reports and report forms on a local or network drive. This does not install the entire Sage Master Builder program on the other drive. It only updates the system reports and report forms.

NOTE: If the install program does not start automatically, go to Start > Run > Browse. Locate your CD drive or CD image folder, select setup.exe, and then click OK. If your computer security warns you that Sage Licensing is trying to access the Internet, click Allow.

An installation complete window appears. The **Launch Sage Master Builder** check box is preselected so that you can launch Sage Master Builder and specify the Sage license server.

Read the important message and follow the instructions to launch Sage Master Builder.

Click **[Finish]**.

Master Builder begins its launch process by displaying the Specify Sage License Server window.

Upgrade Installations

About upgrading Sage Master Builder

If you currently have Sage Master Builder installed on your network computers and you are going to reinstall it, you could be either upgrading or updating the software.

Upgrade installations involve major changes, enhancements, and fixes to many parts of the program or to modules such as licensing. For example, installing Version 15 over Version 14 is an upgrade installation because there are major enhancements to the program.

Update installations, in contrast, usually involve changes to specific files, such as the Sage.SMB.PayrollTax.dll file and report forms. These files can be changed and updated without any changes to major parts of the program.

In addition, upgrade installations are different from a new installations.

- During a new installation (or reinstallation after completely removing Sage Master Builder and Sage licensing), you can designate a computer to be either the Sage license server or a client work station.

- During an upgrade installation, the installer checks to see if Sage licensing exists on that computer. If the installer detects a previous installation, the installer follows the prior installation path for that computer. You do not see the option to select a designation. If a computer had previously been the Sage license server, it will be reinstalled/upgraded again as the Sage license server.

NOTE: If you want to change a computer's designation as either a Sage license server or a client workstation, you need to uninstall the Sage licensing and the Sage Master Builder program using **Control Panel > Add or Remove Programs**.

Upgrade Pre-installation

Upgrade pre-installation tasks

Upgrading your Sage Master Builder software requires that you complete preliminary tasks to ensure the safety of your company data.

When upgrading, it is important that you choose a block of time when you can install the upgrade to all the computers in your office beginning with your Sage license server computer. Depending on your computer's hardware and your network configuration, plan on 15 minutes per computer for the installation process alone. Additional tasks may take extra time.

The following are steps to take before upgrading Sage Master Builder:

1 Make two backups of your company data. We suggest making two backups in case one of them is incomplete, becomes corrupted, or is lost.

2   Exit Sage Master Builder and all other programs - You must not install the Sage Master Builder upgrade when either Sage Master Builder or the Sage Master Builder API are running. We recommend that you shut down all other programs when installing Sage Master Builder, but you do not have to shut down firewall and anti-virus software.

3   Locate the computer on your network that is your Sage license server, and begin the upgrade installation there.

Upgrade Installation

About installing the upgrade

Always begin all installations at the computer that is the Sage license server. After installing the upgrade to the Sage license server, install the upgrade to your workstations from the image placed in a folder on the network.

Sage Master Builder running on client workstations needs to connect to the Sage license server to access your company data. If you do not change the designation of any computers on your network during an upgrade installation, all client workstations will be able to locate the existing Sage license server again after installation.

In addition to installing the Sample Company, you may have the option to update system reports and report forms on a local or network drive. For example, let's suppose that your system reports and report forms are located on a shared drive M under an existing \MB7 folder. Now during Sage Master Builder installation to drive C on your local computer, you can also update system reports and report forms to shared drive M.

This option is only available if an \MB7 folder already exists on a different local or network drive. Updating system reports and report forms on different drive does not install the Sage Master Builder program. For example, if you want to install Sage Master Builder to a network drive, you have to go to that computer and install the program from there.

NOTE: You only need to update your system reports and report form once on the shared drive from one computer on your network.

Resetting the Sage license server computer

In certain instances, you may encounter a Sage license server identification issue. After installing the upgrade, Sage Master Builder should automatically identify the same license server computer as it did before the upgrade.

IMPORTANT: When launching Sage Master Builder on a workstation and you see the message, "Unable to find license server," you can reset the license server computer with a few steps.

To reset the license server computer:

1 On a different computer running Sage Master Builder connected to the Sage license server, launch Sage Master Builder, and then click **File > Change Sage License Server**.

2 On the Change Sage License Server window, look at the first line, and write down the Sage license server IP address. An IP Address is a series of numbers that identifies the computer on a network, for example, 10.227.16.40.

3 Go back to the computer that cannot find the Sage license server, launch Sage Master Builder, and then click **File > Change Sage License Server**.

4 On the Change Sage License Server window, select the second option, **Enter the IP Address or name of the computer**, and follow the instructions on the window.

If you need more information, refer to the Help topic, "Changing the Sage license server."

Upgrade Post-installation

Upgrade post-installation tasks

Once you have completed your upgrade installation, perform the following task:

1 Launch your company and rebuild indexes - Before you can work in the Sage Master Builder company data, you have to rebuild the indexes of each company in which you do work. This process upgrades the company databases to the new version.

For instructions, open the Sage Master Builder Help and search using the Help search shortcut term "indexdatabase."

IMPORTANT: You only have to rebuild the indexes for each company's database one time from one computer using 7-4 Rebuild Indexes.

Change Sage License Server Designation

About reinstalling to change the Sage License Server designation

If you want to change a computer designation from client workstation to Sage license server or vice versa, you must first uninstall the Sage License. Use **Control Panel > Add or Remove Programs** to uninstall the Sage License, then reinstall the Sage Master Builder program. This approach produces the equivalent of a new installation.

If you reinstall Sage Master Builder over an existing installation, the installation process reinstalls the program to the designation selected in the initial installation. Therefore, after reinstallation, a Sage license server computer remains a Sage license server and a client workstation remains a client workstation.

NOTE: Simply reinstalling Sage Master Builder on a computer that is the Sage license server does not affect your license settings or reinstall the License Administration Tool.

To change a computer designation by reinstalling (changing a workstation computer into the Sage license server or the Sage license server into a workstation):

1 Uninstall Sage Licensing from the **Control Panel > Add or Remove Programs**.

2 Reinstall Sage Master Builder following the instructions for new installations.

Information about new installations is in chapter 3, "Sage Master Builder Installation," in the subsection, "New Installations."

Add a New Server

Adding a new server to your network

If you buy a new server to add to your network and you want to reinstall your old server as a client workstation, follow the steps below.

To add a new server to your network:

1 First uninstall Sage Licensing and Sage Master Builder from your current server using **Control Panel > Add or Remove Programs**.

2 Then install Sage Master Builder to the new server with the designation as Sage license server. Don't forget to write down the Sage license server computer's IP Address and computer name.

3 Activate your license and perform other Sage license server tasks.

4 Go to each client workstation, and specify the new Sage license server. Make sure that each client workstation can find and connect to the Sage license server.

5 Install Sage Master Builder on the computer that was the old server and specify the new Sage license server. Make sure that the client workstation can find and connect to the Sage license server.

Chapter 4: Managing Your License with the License Administration Tool

The License Administration Tool

About the License Administration Tool for Sage Master Builder

When you purchase Sage Master Builder software, it includes the License Administration Tool. Using the License Administration Tool, you can import license files, activate licenses, reserve the use of products and features, and monitor the use of products and features. This tool also supports site licenses and floating use licenses. During software installation, the License Administration Tool is automatically installed on the computer that the software installer designates as the Sage license server.

> IMPORTANT: Before you can use Sage Master Builder with your activated license, you have to specify the computer on your network that is the Sage license server when you launch Sage Master Builder.

Where is the Sage license server located?

The Sage license server is software running on a computer on your network that manages the Sage Master Builder products and features that you purchased.

Products and features can be a "core product," additional "modules," and a number of "license uses." The computers running your Sage Master Builder have to be connected to the computer running the Sage license server so that the correct products, features, and number of license uses are available to you.

License Administration Tool Logon

About accessing the License Administration Tool

You use the License Administration Tool for two purposes:

- To activate and manage your Sage Master Builder product license, you must log on to the License Administration Tool in administration mode. At the first launch of the tool, you can set the administration password. Use administration mode to add and update the product licenses, change the password, set up License Groups and license use reservations.

- To view who on your network is using Sage Master Builder, open the License Administration Tool read-only mode.

> IMPORTANT: Before you can log on and manage the license using the License Administration Tool from a client workstation, the \MB7 folder must be shared on the computer that is the Sage license server. For information about sharing folders, see the Microsoft Windows Help.

When you launch the License Administration Tool, the program displays the License Administration Tool Logon window. This window offers two options:

- Open the License Administration Tool in read-only mode. Use this mode to determine who is using Sage Master Builder. For example, you need to use

Sage Master Builder for a task that requires exclusive access. When you open the tool in read-only mode, you can see who is using the program.

■   Open the License Administration Tool in administration mode. Use this mode to manage, add, or remove license uses or to register new modules. The first time you open the License Administration tool, you must set the password. Selecting this option, displays a box or boxes for setting your password and two links, **I forgot my password** and **Change password**. Clicking either of these links launches other windows which enable you either to change or reset the administration password. We strongly recommend that you write down your the License Administration Tool password and save it in a safe place. If you forget your password, you have to call Sage Customer Support to reset it.

Logging on with read-only mode

1   Double-click the LA desktop icon.

2   On the License Administration Tool Logon window, accept the option, **Open the License Administration Tool in read-only mode**. For example, use read-only mode to determine who is using Sage Master Builder.

3   Click **[OK]**, then click **[OK]** on the message window.

4   The License Administration Tool opens in read-only mode.

Logging on with administration mode

1   Double-click the LA desktop icon.

2   On the License Administration Tool Logon window, select the option, **Open the License Administration Tool in administration mode**. For example, use this mode to add or remove license uses or to register new modules.

3   In the Password box, type your password.

NOTE: Your License Administration Tool password is case-sensitive.

4 Click **[OK]**, then click **[OK]** on the message window.

5 The License Administration Tool opens in administration mode.

Setting the password

IMPORTANT: We strongly recommend that you write down your administrator user password and save it in a safe place. If you forget your password, you have to call Sage Customer Support to reset it.

After the License Administration Tool has been successfully installed, clicking the License Administration Tool desktop icon opens the License Administration Tool Logon window. Before the Administrator can log on and manage the license using the License Administration Tool from a client workstation computer, the \MB7 folder must be shared on the computer is the Sage license server. For information about sharing folders, see the Windows Help.

To set the administrator user password:

1 In the Password box, type a password.

NOTE: Your License Administration Tool password is case-sensitive.

2 In the Confirm Password box, re-type the password and click **[OK]**.

3 The License Administration Tool window opens. From this window you can manage your product license, license groups, and license use reservations.

Changing the password

IMPORTANT: We strongly recommend that you write down your administrator user password and save it in a safe place. If you forget your password, you have to call Sage Customer Support to reset it.

To change the administration password:

1 Double-click the LA desktop icon.

2 On the License Administration Tool Logon window, select the option, **Open the License Administration Tool in administration mode**. For example, use this mode to add or remove license uses or to register new modules.

3 Click the text link, **Change my password**.

4 On the Change Password window in the Old Password box, type your old password.

5 In the Password box, type a new password.

6 In the Confirm Password box, type a new password again, and click **[OK]**.

7 The License Administration Tool window opens.

From this window you can manage your product license, license groups, and license use reservations. Before the Administrator can log on and manage the license using the License Administration Tool from a client workstation computer, the \MB7 folder must be shared on the computer is the Sage license server. For information about sharing folders, see the Windows Help.

Resetting the password

To reset the administrator user password, you have to contact Sage Customer Support.

IMPORTANT: Before the Administrator can log on and manage the license using the License Administration Tool from a client workstation computer, the \MB7 folder must be shared on the computer that is the Sage license server. For information about sharing folders, see the Windows Help.

To reset the administrator user password:

1 On the Logon Administrator Password window, click **I forgot my password**.

2 The Forgotten Password window opens.

3 Read the instructions, phone Sage Customer Support at 800-866-8049, and type the temporary password they provide in the box.

4 You can also ask Sage Customer Support to send you the temporary password in an email message. From that message, you can copy and paste the temporary password into the Forgotten Password box.

IMPORTANT: Type the temporary password exactly as provided by Sage Customer Support. Passwords are case-sensitive.

5 Click **[OK]**.

6   The Change Password window opens. The temporary password is now displayed in the Old Password box. The temporary password acts as your old password and allows you to set a new password.

7   In the New Password box, type a new password.

8   In the Confirm Password box, re-type the new password and click **[OK]**.

9   The License Administration Tool window opens. From this window you can manage your product license, license groups, and license use reservations.

Monitoring Product and Feature Use

About monitoring product and feature use

After activating licenses and reserving the use of Sage Master Builder, you can monitor the license use and group reservations from the License Administration Tool window.

> **Tip:** The terms you see in this topic, such as Status, License Type, and so forth are defined in the Glossary under License Administration Tool.

When you select a Floating use License Type with reservations in the License Administration Tool window, the window displays the following grids:

- License details for product line

- Summary of product or feature use

- Current users of the product or feature

When you select a Floating use License Type without reservations, the window displays the license details Current users of the product or feature grid.

When you select a Site License Type, the window displays the license details grid and definitions for the Product Line, Product or Feature, and License Type.

NOTE: If you have not added licenses, the grids on the
License Administration Tool window are empty.

License details for product line

After you add licenses, the license details grid displays the following information
for the product line:

- Status

- Product Line (Hidden by default. To display, right-click a column heading
  in the grid and select **Hide/Show Columns > Product Line**.)

- Product or Feature

- Reservations Allowed (Hidden by default. To display, right-click a column
  heading in the grid and select **Hide/Show Columns > Reservations
  Allowed**.)

- License Type

- Total Uses

- Available Uses

- In Use

- Expiration Date

- Version

Summary of product or feature use

After you reserve the use of products and features for a floating use license, the
Summary of product or feature use grid displays the following information for the
license that you select in the license details grid.

- Reserved For

- Total

- Available

- In Use

Current users of the product or feature

After you activate floating use licenses, the Current users of the product or feature grid displays the following information for the license that you select in the license details grid.

- User Name

- Reserved Under

- Computer Name

- Session ID

- In Use Since

Show and Hide Column Features

About showing or hiding columns

Use the Show/Hide Columns window to select the columns that you want to display in the license details grid on the License Administration Tool window.

Showing columns

To monitor license use, you may choose to show columns.

To show columns:

1 From the License Administration Tool window, right-click a column heading in the license details grid and select **Hide/Show Columns**.

2 From the **Show/Hide Columns** window, select the columns that you want to display or click **Show All**.

3 Click **[OK]**.

Hiding columns

You may want to hide one or several columns for business security reasons.

To hide a column:

1 From the License Administration Tool window in the license details grid, right-click the column heading that you want to hide.

2 Select **Hide Column**.

Hiding all columns

You may want to hide all the columns for business security reasons.

NOTE: You cannot hide the Product or Feature column.

To hide all columns

1 From the License Administration Tool window, right-click a column heading in the license details grid and select **Hide/Show Columns**.

2 From the **Show/Hide Columns** window, click **[Hide All]**.

3 Click **[OK]**.

Managing Licenses

About managing licenses

Use the Manage Licenses window to add product keys, update product keys, and activate licenses.

Importing the license file

Use the Import License File window to import a license file into the Sage license server.

License activation is based on either importing a license file or manual entry of up to four product keys. Take a moment to locate your product keys. They are a series of 16-letter codes used to activate your license. They have been sent to you in a license file attached to an email from your business partner, on your Sage Master Builder packing slip, and/or on a sticker on the CD envelope.

NOTE: If you did not receive a license file in an email message, follow the instructions for adding or updating product keys.

To import the license file:

1 Open the email message with the attached license file from Sage or your business partner.

2 Save the license file attachment to the Windows desktop.

3 From the License Administration Tool window, click **[Manage Licenses]**.

4 From the Manage Licenses window, click **[import the license file]**.

5 From the Import License File window, select the license (.lic) file name and click **[Open]**.

6 From the Manage Licenses window, click **[activate the licenses]**.

7 Click **[Close]**.

Adding or updating product keys

Use the Add or Update Product Keys window to type the product keys. Each time you add or make changes to licenses, you will receive new product keys.

License activation is based on either importing a license file or manual entry of up to four product keys. Take a moment to locate your product keys. They are a series of 16-letter codes used to activate your license. They have been sent to you in a license file attached to an email from your business partner, on your Sage Master Builder packing slip, and/or on a sticker on the CD envelope.

NOTE: If you received an email message with an attached license file from Sage, follow the instructions for importing the license file.

To add or update product keys:

From the Manage Licenses window, click **[type the product keys]**.

1 In the Type the product keys boxes on the Add or Update Product Keys window, type the product keys listed on your CD envelope or that are printed on your packing slip.

2 On the Add or Update Product Keys window, click **[Accept Product Keys]**.

3 Click **[Accept Product Keys]**.

4 On the Manage Licenses window, click **[Activate the licenses]**.

5 Click **[Close]**.

Activating licenses

After importing the license file or entering product keys, you have to activate your licenses.

To activate your license:

1 On the Manage Licenses window, either import the license file or add the product keys.

2 Click **[Activate the licenses]**.

3 Click **[Close]**.

When you see two green check marks by Step 1 and Step 2, you know that your license has been activated. You can now launch the License Administration Tool and specify the computer on your network that is the Sage license server.

Managing Reservations

About managing group reservations

Use the Group and Uses columns on the Manage Reservations window to reserve product and feature uses for groups.

When a user logs in to a Sage Master Builder company, the Sage license server assigns a license use from the first available group to which the user belongs. If no reserved license uses are available, the Sage license server assigns a license use from the unreserved license uses.

> IMPORTANT: If no reserved or unreserved license uses are available, you cannot launch Sage Master Builder connected. You can only launch the program disconnected with exclusive access.

Setting up group reservations

Use the Group and User columns on the Manage Reservations window to reserve license uses for groups.

When a user logs in to a Sage Master Builder company, the Sage license server assigns a license use from the first available group to which the user belongs. If no group reservations are available, the Sage license server assigns a license use from the unreserved uses.

IMPORTANT: You must import the license file or enter product keys before you set up group reservations.

To set up group reservations:

1 From the License Administration Tool window, click **[Manage Reservations]**.

The Manage Reservations window for this product line opens.

2 >In the Group column, type the name of the first group of users.

3 You can assign any group name that works for your purposes.

4 In the Uses column, type the number of license uses that you want to reserve for this group.

IMPORTANT: The total number of Uses for all groups cannot exceed the Total Uses listed for this product on the License Administration Tool window.

5 Repeat steps 2 and 3 for each group.

Tip: If you want to retain some unreserved license uses, do not reserve all license uses for groups.

6 Click **[OK]**.

Removing group reservations

You may need to create new reservation groups when you hire new employees or open a new office.

To remove group reservations:

1 From the License Administration Tool window, click **[Manage Reservations]**.

2 From the Management Reservations window, select the row for the Group that you want to remove.

3 Click the **[Delete the selected row]** (the X button).

4 Click **[OK]**.

Troubleshooting Network Disconnect Issues

Disconnected from the network

NOTE: This information does not apply if you are running Sage Master Builder and the Sage license server on one computer as a stand-alone installation.

If a workstation is disconnected from the Sage license server while you are using the License Administration Tool, the system displays a **Disconnected from the License Server** message.

Since our products run on your company's network, it is important to maintain the network connection between workstations and the Sage license server. When your workstation is disconnected from the Sage license server, you cannot perform license administration functions using the License Administration Tool on the workstation.

To reconnect to the license server:

1 Wait a few minutes, and then try again to use the License Administration Tool.

2 If the workstation is still disconnected, check whether the network cable is unplugged.

3 If the workstation remains disconnected, check whether a network drive is disconnected.

4 Contact your network administrator.

When the connection is restored, the License Administration Tool returns to normal and you can perform any of its functions.

Network cable unplugged

When the network cable is unplugged from your workstation, you cannot perform license administration functions using the License Administration Tool.

To check whether a network cable is unplugged:

1 Check the notification area, at the far right of the taskbar, for this message: **A network cable is unplugged**.

2 If you see this message, reconnect the network cable to the workstation.

3 If you do not see this message, check the network connections.

   a Click **[Start]**, and select **Control Panel > Network Connections**.

   b In the LAN or High-Speed Internet section, check the Status of the Local Area Connection.

   c If the Status is Network cable unplugged, reconnect the network cable to the workstation.

   d If the Status is Connected, the network cable is connected to the workstation.

4 Try to use the License Administration Tool.

Disconnected network drive

When your workstation is disconnected from the network drive for the Sage license server, you cannot perform license administration functions using the License Administration Tool.

To check whether a network drive is disconnected:

1 Click **[Start]**, and select **My Computer**.

2 In the Network Drives section, check the Type column for the network drive for the Sage license server.

3 If the Type is Disconnected Network Drive, select the network drive and then select another network drive.

4 If the Type changes to Network Drive, try to use the License Administration Tool.

5 If the Type remains Disconnected Network Drive, contact your network administrator.

Chapter 5: License Use and Sage Master Builder

Specify Sage License Server

About specifying the Sage License Server

Before you can use Sage Master Builder with your activated license, you have to specify the computer on your network that is the Sage license server. There are two ways to specify the Sage license server:

- You can select the computer from the list of computers on your network; or

- You can enter the IP Address or name of the computer.

Selecting the Sage license server computer

One method is to select the computer running the Sage license server from the list of network computers.

NOTE: To use this method of selecting a server from the list of network computers, you must have already clicked the appropriate link on the Specify Sage License Server window.

To select the computer running Sage license server from the list of network computers:

1 On the Select License Server window from the list of network computers, select the computer running the Sage license server.

2 Click **[OK]**.

Entering the IP Address or name of the computer

One method is to enter the IP Address or name of the computer running the Sage license server.

NOTE: To use this method of selecting a server from the list of network computers, you have already clicked the appropriate link on the Specify Sage License Server window.

To enter the IP Address or name of the computer running the Sage license server:

1 In the text box, type the IP Address or name of the computer.

2 Click **[OK]**.

Determining the name of a computer

NOTE: If you are trying to determine the name of the computer running the Sage license server, you must complete this procedure on that computer.

To determine the name of a computer:

1 Click **Start > Settings > Control Panel**.

2 From the list, scroll to and double-click **System**.

3 The System Properties window appears.

4 Locate the line Full computer name, and write it down or type it into a note that you can print.

5 Click **[Cancel]**.

Determining the IP Address of a computer

NOTE: If you are trying to determine the IP Address computer running the Sage license server, you must complete this procedure on that computer.

To determine the IP Address of a computer:

1 Click **Start > Run**.

2 In the Open text box, type cmd, then click **[OK]**.

3 The \Windows\...\cmd.exe window appears.

4 At the prompt, type ipconfig.

5 For example, you might see H:\. Type ipconfig after the drive letter. When you press the Enter key, the system displays several addresses, among which is the IP Address of the computer. You see a line similar to this:

```
IP Address . . . . . . . .172.20.22.142
```

What is an IP Address?

Every computer connected to the Internet is assigned a unique number known as an Internet Protocol (IP) address. This numeric address of a computer on the Internet is written as a set of four numbers separated by periods (each number can range from 0 to 255). An example of an IP Address is 123.123.4.5.

NOTE: If you are trying to determine the IP Address of the computer running the Sage license server, you must complete the procedure on that computer.

What is a server?

There are many kinds of servers. Some servers are denoted by their hardware configuration and a specialized operating system. Other servers consist of specialized software applications running on standard computers.

Some servers are called "file servers" and may be a powerful computer dedicated to storing files and data. For example, Sage Master Builder company data can be stored on a file server. Any Sage Master Builder user on the same network as the file server can access and store data there.

A server can also be a software application that provides a specific kind of service to client software running on other computers. The term server can refer to a particular piece of software, such as the Sage license server. When we refer to the Sage license server, we are describing a computer that is running the Sage license server software.

Running Sage Master Builder Connected

Launching and running Sage Master Builder connected

NOTE: If you are having a problem running Sage Master Builder connected, it is very likely a network problem or your computer's connectivity to your network. If problems persist, consult with your local system administrator.

The desired Sage License Server Connection State is:

Connected: License use acquired. This connection state allows you to use all the power of the Sage Master Builder product that you purchased and licensed. Running connectedconnected means that your computer is connected to the Sage license server, and there is a license use available to you.

Prerequisites for a launching and running connected include:

- An activated Sage Master Builder product license. The administrator user activates the product license using the functions of the License Administration Tool.

- A network connection, if you are on a network. This only pertains to working in a network environment and does not pertain to a single computer running in a stand-alone environment.

- The Sage license server that has been specified from the computer running Sage Master Builder.

- An available license use.

- Being a user and having access to a Sage Master Builder company.

To launch and run Sage Master Builder connected:

1 Double-click the Sage Master Builder desktop icon.

2 The Specify Sage License Server window appears.

3 Choose one of the following:

  a Select the Sage license server from the list of computer on your network.

  b Enter an IP Address or name of the computer that is the Sage license server.

4 When you have satisfied the conditions to specify the Sage license server, click **[OK]**.

5 Sage Master Builder begins its launch process.

6 On the Company List window, select a company, or click **[Cancel]**.

7 From the Company List window, select a company.

8 On the User Name and Password window, enter your user name and password.

9 Sage Master Builder opens the company.

You are now running Sage Master Builder connected.

About the Sage License Server Connection states

You can view the current connection state to the Sage license server in the About Sage Master Builder window. Your connection state is defined by several factors involving your network connectivity and the availability of license uses. The following table presents connection state definitions:

Sage license server connection state	About Sage Master Builder window displays
Connected	You have launched Sage Master Builder but not logged in to a company yet. Connected: License use not acquired.
Connected	You have successfully logged in to a company. Connected: License use acquired.
Connected	After a successful login, you have chosen to open a new company, change user name/access, or change the Sage license server. Connected: License use returned.

Sage license server con-nection state	About Sage Master Builder win-dow displays
Originally connected, later dis-connected, now reconnected	You have successfully logged in, but you lost connection to Sage license server and the license use has expired. Now you are con-nected again but when you try to acquire a license use, no uses are available. Connected: License use lost.
Disconnected	You are disconnected at launch or at subsequent log in when select-ing a company. Disconnected: x uses remaining, or Disconnected: One use remaining.
Connected	Your educational or trial product has expired. Activated license has expired.
Connected	Your unauthorized product has expired. The seven-day grace period for license activation has expired.

NOTE: If the computer running the Sage license server becomes disconnected from the other computers on your network, or if your computer becomes disconnected from the Sage license server, you may see an alert message from Sage Master Builder telling you that you are disconnected.

Viewing the Sage license server connection state

You can view the current connection state of the Sage license server. This may help you in situations where your Sage license server connection status is not what you expect it to be. Viewing the connection state can help you troubleshoot problems.

To view the Sage license server connection state:

1 From the Sage Master Builder main window, click **[Help > About Sage Master Builder]**.

2 The About Sage Master Builder window appears.

3 In the lower right of the window just above the **Close** button, look for Sage License Server Connection State.

4 The text in the box displays the current connection state.

Company List window

About the Company List window

During installation, you have the option to install Sage Master Builder on a specific local drive, such as C:, D:, etc. When you launch Sage Master Builder, the first window that appears is Company List. From this window, you select the location of company you want to open, then you select the company itself, and click **[OK]**.

For example, if you have installed Sage Master Builder and the Sample Company on local drive C:, and this is the first time you have launched the program, then the program displays the local drive, and the Sample Company appears in the list directly below.

In most business situations, the company that you use to manage your business is not located on your local computer; it is located on a server computer on your local area network. The server could be a dedicated server in a client/server configuration or it could be a colleague's computer in the next office using a peer-to-peer configuration.

In a network environment, clicking the drop-down arrow displays all the local drives and all the network drives that you have access to. In the following graphic, you can see a list of network drives that have been mapped to from this computer.

If you can see the shared network drive in the list, then you can access the Sage Master Builder company located on that drive.

If you cannot see the drive where the company is located, then ask yourself these questions or consult with your network administrator to locate your company.

- Have you lost your network connection? If you have, then you cannot access network drives and the Sage Master Builder company.

- Has the server lost its network access or crashed? If that has happened, then you can access the server and the company.

- Has the company been moved to a different computer and drive? If that's true, then you have to map to the network drive in its new location.

Mapping a network drive to access a company

You may have to map to a network drive to access a Sage Master Builder company if it is not located on a drive on your local computer. Let's suppose that the company has been moved to network drive Z: Now to access the company data, you have to map to drive Z.

To map a network drive to access a company:

1 On your Windows desktop, click **[Start > Explore]**.

2 On the tool bar, click **[Tools > Map Network Drive]**.

3 On the Map Network Drive window, click **[Browse]**.

4 Locate the drive, and then click **[OK]**.

5 On the Map Network Drive window, click **[Finish]**.

6 Launch Sage Master Builder.

7 On the Company List window, select drive Z.

8 Select the company, and click **[OK]**.

Special Configurations - Operating Systems and Services

Chapter 6: Special Configurations - Operating Systems and Services

Windows 7 Professional and Server 2008 R2 Standard Operating Systems

Launching Sage Master Builder to run as administrator for scheduling reports

> IMPORTANT: On computers running Windows 7 Professional
> or Server 2008 R2 Standard, scheduling Sage Master Builder
> reports and viewing My Scheduled Reports requires that you to
> "run as administrator" or to "run the program as administrator."

Microsoft Windows has changed security rules in the Windows 7 Professional and Server 2008 R2 Standard operating systems to make your computer more secure. If you are running Sage Master Builder as a typical user, then you have limited privileges in some areas of the program, such as saving a report schedule or viewing My Scheduled Reports. So, to save a report schedule or view My Scheduled Reports, you must launch Sage Master Builder with the command to either Run as administrator or Run this program as an administrator.

When you select either command, the settings are limited to you personally. Your settings to run Sage Master Builder as administrator do not affect the next person who logs on and launches Sage Master Builder from this computer. Your settings on this computer can either be temporary or persistent. For example, when you select Run as administrator, you run the program as administrator for that session only. When you select Run this program as an administrator, you set program properties to always run the program as administrator when you log on to this computer.

NOTE: "Run as administrator" and "Run this program as an administrator" are not related to Windows 7 Professional or Server 2008 R2 Standard operating systems user groups but are limited to a specific program you are running.

To set Run as administrator:

1 On your Windows desktop, right-click the Sage Master Builder program icon.

2 From the drop-down menu, to launch the program, click **[Run as administrator]**.

NOTE: Selecting **Run as administrator** only runs the current session of running Sage Master Builder. The setting does not persist.

To set Run this program as an administrator:

1 On your Windows desktop, right-click the Sage Master Builder program icon.

2 From the drop-down menu, click **[Properties]**.

3 On the Sage Master Builder Properties window, click the **[Compatibility]** tab.

4 Under Privileges Level, select **Run this program as an administrator**.

5 Click **[Apply]**, and then click **[OK]**.

NOTE: Selecting **Run this program as an administrator** always runs the program with these properties when you launch the program on this computer. The setting persists.

Windows 7 Professional and Server 2008 R2 Standard "Sleep Mode" prevents computers from obtaining a license use

If a computer running the Windows 7 Professional or Server 2008 R2 Standard operating system is used as a license server, when it goes into sleep mode other computers on the network can't obtain a license.

Set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to "Never:"

1 **Start > Control Panel > System and Security > Power Option**s.

2 Select **Change when computer sleeps**.

3 From the **Put computer to sleep** list, select **Never**.

Sage licensing (Sage Service Host) cannot auto-start on Windows 7 Professional and Server 2008 R2 Standard

The Sage licensing service (Sage Service Host) cannot auto-start on computers running the Windows 7 Professional or Server 2008 R2 Standard operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Solution for Server 2008 R2 error message about mb7.kpr file

If you encounter an error message about opening the mb7.kpr file when launching Sage Master Builder on a computer running Windows Server 2008 R2, follow these steps to resolve the issue:

1 On the Window desktop, right-click **Start**, and then click **Open Windows Explorer**.

2 On the left side of the window, under **Computer > Local Disk**, right-click the \MB7 folder, and then select **Properties**.

3 On the **MB7 Properties** window, click the **Security** tab.

4 From the list under **Group or User Names**, select **USERS**, then click the **[Edit]** button.

5 On the **Permissions** window, select **USERS** again, and under **Allow**, select the **Full control** check box.
   Selecting **Full control**, selects all the check boxes necessary for this solution.

6 On the **Permissions** window, click **[OK]**, and then on the **MB7 Properties** window, click **[OK]**.

Server 2008 R2 network configuration and TCP Remoting Channel

Sage Master Builder uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. File and printer sharing on computers running the Server 2008 R2 operating system must be enabled. To enable file sharing, follow the instructions in the Windows Server 2008 R2 Help.

Windows Server 2008 R2 and Microsoft .NET 3.5.1

The Microsoft .NET 3.5.1 must be available and enabled on a Windows Server 2008 R2 machine.

To enable .NET 3.5.1 on Windows Server 2008 R2:

1 Click **[Start]** on the Server.

2 Click **[Control Panel]**.

3 Under the Programs section, click on "Turn Windows Features On or Off."

4 Scroll down to the Features Summary section and select "Add Features."

5 Expand ".NET Framework 3.5.1 Features."

6 Check the box for ".NET Framework 3.5.1."

NOTE: Enabling .NET Framework 3.5.1 may require a reboot.

7 Restart Sage Master Builder.

Windows Vista, Windows 7, and Server 2008 Operating Systems

Installation and AutoPlay

Program installations begin immediately upon inserting the CD into the CD-ROM drive if AutoPlay is set to begin automatically. With computers running the Windows XP operating system, you can start the installation manually by using the **Start > Run > Browse** command to locate and select setup.exe. With computers running the Vista and Server 2008 operating systems, this command path has changed.

- On Vista/Windows 7, click the Vista/Windows 7 button (left circular button at lower left of the system tray) to open a window with the Start/Search text box at the bottom. Type **setup.exe** in the text box, and press the Enter key. When the system search locates the file on the CD, double-click the file to begin the installation process.

- On Server 2008, click **Start > Run > Browse**. Locate **setup.exe**, on the CD, and double-click the file to start the installation.

Launching Sage Master Builder to run as administrator for scheduling reports

> IMPORTANT: On computers running Windows 7 Professional or Server 2008 R2 Standard, scheduling Sage Master Builder reports and viewing My Scheduled Reports requires that you to "run as administrator" or to "run the program as administrator."

Microsoft Windows has changed security rules in the Windows 7 Professional and Server 2008 R2 Standard operating systems to make your computer more secure. If you are running Sage Master Builder as a typical user, then you have limited privileges in some areas of the program, such as saving a report schedule or viewing My Scheduled Reports. So, to save a report schedule or view My Scheduled Reports, you must launch Sage Master Builder with the command to either Run as administrator or Run this program as an administrator.

When you select either command, the settings are limited to you personally. Your settings to run Sage Master Builder as administrator do not affect the next person who logs on and launches Sage Master Builder from this computer. Your settings on this computer can either be temporary or persistent. For example, when you select Run as administrator, you run the program as administrator for that session only. When you select Run this program as an administrator, you set program properties to always run the program as administrator when you log on to this computer.

NOTE: "Run as administrator" and "Run this program as an administrator" are not related to Windows 7 Professional or Server 2008 R2 Standard operating systems user groups but are limited to a specific program you are running.

To set Run as administrator:

1 On your Windows desktop, right-click the Sage Master Builder program icon.

2 From the drop-down menu, to launch the program, click **[Run as administrator]**.

NOTE: Selecting **Run as administrator** only runs the current session of running Sage Master Builder. The setting does not persist.

To set Run this program as an administrator:

1 On your Windows desktop, right-click the Sage Master Builder program icon.

2 From the drop-down menu, click **[Properties]**.

3 On the Sage Master Builder Properties window, click the **[Compatibility]** tab.

4 Under Privileges Level, select **Run this program as an administrator**.

5 Click **[Apply]**, and then click **[OK]**.

NOTE: Selecting **Run this program as an administrator** always runs the program with these properties when you launch the program on this computer. The setting persists.

Vista and Server 2008 "Sleep Mode" prevents computers from obtaining a license use

If you are using a Vista or Server 2008 computer as the Sage license server and it goes into **Sleep Mode**, the workstations cannot obtain a license use. Possible resolutions are:

Use a different computer on your network to be the Sage license server. Any supported operating system can be used in place of Vista or Server 2008, for example, Windows XP.

Set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to Never:

1 **Start > Control Panel > System and Maintenance > Power Options**.

2 Select **Change when computer sleeps**.

3 From the **Put computer to sleep** list, select **Never**.

Sage licensing (Sage Service Host) cannot auto-start on Vista, Windows 7, or Server 2008

> IMPORTANT: Read this information if you are running Vista or Server 2008 operating systems on your office computers.

The Sage licensing service (Sage Service Host) cannot auto-start on computers running the Vista, Windows 7, or Server 2008 operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Solution for Server 2008 error message about mb7.kpr file

If you encounter an error message about opening the mb7.kpr file when launching Sage Master Builder on a computer running Windows Server 2008, follow these steps to resolve the issue:

1 On the Window desktop, right-click **Start**, and then click **[Explore]**.

2 On the left side of the window, under **Folders**, right-click the MB7 folder, and then select **Properties**.

3 On the **MB7 Properties** window, click the **[Security]** tab.

4 From the list under **Group or User Names**, select **USERS**, then click the **[Edit]** button.

5 On the **Permissions** window, select **USERS** again, and under **Allow**, select the **Full control** check box.
   Selecting **Full control**, selects all the check boxes necessary for this solution.

6 On the **Permissions** window, click **[OK]**, and then on the **MB7 Properties** window, click **[OK]**.

Vista, Windows 7, and Server 2008, or Server 2008 R2 installation and mapped drives

Mapped drives may not be available when installing on a computer running the Vista, Windows 7, or Server 2008 operating systems. See the Microsoft knowledgebase article about allowing mapped drives to display elevated users: http://support.microsoft.com/kb/937624/

> NOTE: If you need to install to a mapped drive, install the program to a computer that is running another supported operating system, such as Windows XP.

Vista, Windows 7, and Server 2008 network configuration and TCP Remoting Channel

Sage Master Builder uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. File sharing on computers running the Vista, Windows 7, or Server 2008 operating system must be enabled. To enable file sharing, follow the instructions in the Vista, Windows 7, or Server 2008 Help.

Vista, Windows 7, and Server 2008 and changing the Sage License Server computer

On a Vista, Windows 7, or Server 2008 workstation, when you select **File > Change Sage License Server > Select the computer from the list of computers on your network**, the command may fail to generate a list of network computer names. To resolve this issue, click **Enter the IP address or name of the computer**, and then type the IP Address of the server computer in the box.

Windows Server 2003 Operating System

> NOTE: Configuration for Windows Small Business Server 2003 is the same as configuration for Windows Server 2003.

Configuring Windows Server 2003 date format

It is necessary when using Windows Server 2003 to configure the date format.

To configure the Windows Server 2003 date format:

1 Click the **[Start]** button, point to **Control Panel**, then click **Regional and Language Options**.

2 On the **Regional and Language Options** dialog box, on the **Regional Options** tab, click the **Customize...** button.

3 On the **Customize Regional Options** dialog box, click the **[Date]** tab.

4 Under **Short date,** from the **Short date format** drop-down list, select **MM/dd/yyyy**.

5 Click **[OK]**.

6 To close **Customize Regional Options**, click **[OK]** again.

Setting up Windows Server 2003 for PDF and RTF printers

In Windows Server 2003 (Standard Edition) and Windows Server 2003 (Enterprise Edition), the installation of kernel-mode drivers is blocked by default. Before you can install Sage Master Builder PDF and RTF printers with Windows 2003 Server, you have to unblock the installation of the kernel-mode drivers and edit the Group Policy.

To unblock the installation and edit the Group Policy:

1 On your Windows Server desktop, click **[Start]**, then **Run...**.

2 The **Run** dialog box opens.

3 In the **Open:** text box, type gpedit.msc, and then press Enter.

4 The **Group Policy** window opens.

5 In the left pane, on the **Tree** tab, double-click the **Administrative Templates** folder.

6 Then double-click the **Printers** folder.

7 In the right pane, in the **Setting** list, find and set the state of the setting for **Disallow installation of printers using kernel-mode drivers** to **Disable**.

Windows XP Professional (SP2) Operating System
Configuring the Windows XP Professional date format

To configure the date format:

1 Click the **[Start]** button, point to **Settings**, and click **Control Panel**.

2 Double-click the **Regional and Language Options** icon, and click the **Regional Options** tab.

3 Click the **Customize** button and the **Date** tab.

4 In the **Short Date Format** list, select **MM/dd/yyyy**.

5 Click **[OK]**.

Citrix and Terminal Servers
Using Citrix and Terminal Server with Sage Master Builder

Many people use Citrix and Terminal Server to manage remote access to their local area network (LAN). If Sage Master Builder is installed on the computer running Citrix or Terminal Server and on your laptop, then you may log on to the computer running Citrix or Terminal Server with your laptop and work in Sage Master Builder on your LAN. This enables you to work from home, from a job site, or from any number of other remote locations.

We recommend that you use DOS commands to change the operating mode from "execute" to "install" and then back to "execute." When using the DOS commands to install, you may install the Sage Master Builder software as you would on any desktop or Windows server operating system that meets Sage Master Builder requirements.

Installing on computers running Citrix and Terminal Server using DOS commands

To install using DOS commands:

1 Click **[Start]**, then **Run**.

2 On the **Run** window, in the **Open** drop-down box, type cmd, and press the Enter key.

3 The **\Windows\...\cmd.exe** window appears.

4 At the prompt, type change user /install, and press the Enter key.

5 This enables the install mode.

6 Install the Sage Master Builder software as you would on a typical workstation or Windows Server.

7 At the end of the installation process, choose to launch the License Administration Tool.

8 Using the License Administration Tool window, manage your license and activate it.

9 After activation, click **[Start]**, then **[Run]**.

On the **Run** window, in the **Open** drop-down box, type cmd, and press the Enter key.

The **\Windows\...\cmd.exe** window appears.

At the prompt, type change user /execute.

This enables the execute mode, which is the default mode for running Citrix and Terminal Server.

Exit the **Run** window.

Restart the server.

IMPORTANT: If this message appears: "Install mode does not apply to a terminal server configured for remote administration," then it is not necessary to enable the install mode. You may install the Sage Master Builder software as you would on a typical workstation.

Backing Up Your Data

Data backup

With any computer system, there is the possibility for failure and loss of data.

> Caution!
>
> Use a backup method and device suitable for your business

requirements. We strongly recommend that you maintain a
routine backup schedule and store your data in a safe
environment that is separate from your server, preferably off
site.

Which files to back up in Sage Master Builder

NOTE: This topic only applies to existing Sage Master Builder
customers.

When you back up your company data, we recommend that you back up your
company financial data as well as all your custom reports and forms. If you are
running multiple Sage Master Builder companies, back all of them up.

When backing up data as part of the year-end close process, it is important to
count the number of files and folders in your company.

To see the number of files and folder in a company folder, in Windows Explorer,
right-click the company folder and select Properties. On the Properties window,
the General tab, look in the list for the Contains line for the number of files and
folders. Write this number down so that you can refer to it after you have made
the two copies. The number of files and folders has to be exactly the same in both
the company and the backup copy.

IMPORTANT: If you are working across a network, you must
remember to backup company folders, report folders, and form
folders that reside at the server.

We strongly recommend that you back up:

■   Each company folder that contains financial data (\MB7\your company\)

■   The **Custom Reports** folder (\MB7\Custom Reports)

- The **Report Forms** folder (\MB7\Report Forms)

- The **System Reports** folder (\MB7\System Reports)

> IMPORTANT: When backing up your data, be sure to make a
> full backup and not an incremental or differential backup. An
> incremental or differential backup only records alterations to the
> data since the last backup.

An example of one backup method

There are various methods for backing up your data. Depending on the amount of
data entry you routinely perform, you might consider making full daily backups.
It is also a good idea to regularly take one backup off the business premises or
store them in a fireproof safe. If a burglary or fire occurs, a copy of your data is
safe from harm.

One reliable procedure, requiring a tape drive and multiple sets of tapes, requires
you to make daily and monthly backups.

Daily Backup Process

For the daily backup process, you need 10 tapes. Label five of the tapes as Week
A, with a tape designated for each weekday. Label the other five tapes as Week
B, with a tape designated for each weekday.

Start with the set of tapes labeled Week A. Monday night when you make the
backup use the tape labeled Monday, on Tuesday use the tape labeled Tuesday,
and so forth. At the start of the next week, use the set of tapes labeled Week B to
make your backups. At the end of two weeks, you will have a data backup for
each day. Then at the start of the third week, use the set of tapes labeled Week A
again. Over the course of a year, you will cycle through the two sets of tapes. Be
sure to store the most recent Friday backup off site.

Monthly Backup Process

For the monthly backups, you need a separate set of three tapes labeled Month A, Month B, and Month C respectively. Like the weekly backups, use each tape to back up the data for a different month, cycling through each of the tapes over the course of the year. After making a monthly backup, write the month and year on the label to help you track which tape to use next. Be sure to remove the most recent monthly backup off site.

Backing up your data to a CD or DVD

This topic suggests a generic way to back up your data to a CD or DVD. Backing up to a CD or DVD successfully depends on your computer system, including hardware and software. To back up to a CD or DVD, you must have access to a CD or DVD (Read/ Write capability), and the appropriate CD or DVD media.

When backing up data as part of the year-end close process, it is important to count the number of files and folders in your company. To see the number of files and folder in a company folder, in Windows Explorer, right-click the company folder and select Properties. On the Properties window, the General tab, look in the list for the Contains line for the number of files and folders. Write this number down so that you can refer to it after you have made the two copies. The number of files and folders have to be exactly the same in both the company and the backup copy.

IMPORTANT: If you are working across a network, you must remember to backup company folders, report folders, and form folders that reside at the server.

To back up your data to a CD or DVD:

1 Place the CD or DVD media in the CD or DVD.

2 On your Windows desktop, right-click **[Start > Explore]**.

3 In Windows Explorer, locate the \MB7\ folder again, right-click the **[Custom Reports]** folder and from the menu select **[Copy]**.

4 Locate the CD or DVD drive, and click it.

5   Then in the right-pane, right-click and select **[Paste]**.

6   In Windows Explorer, locate the \MB7\ folder again, right-click the **[Report Forms]** folder and from the menu select **[Copy]**.

7   Locate the CD or DVD drive, and click it.

8   Then in the right-pane, right-click and select **[Paste]**.

9   In Windows Explorer, locate the \MB7\ folder again, right-click the **[System Reports]** folder and from the menu select **[Copy]**.

Locate the CD or DVD drive, and click it.

Then in the right-pane, right-click and select **[Paste]**.

In Windows Explorer, locate the \MB7 folder.

Right-click a company folder that contains current financial data, and from the menu, select **[Copy]**.

Locate the CD or DVD drive, and click it.

Then in the right-pane, right-click and select **[Paste]**.

Repeat 12 through 15 for every active company with current financial data.

Depending on your hardware and software, the folder will be copied to the CD or DVD media. For further information or support, contact your CD or DVD manufacturer.

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