sage Pastel Partner Accounting

VERSION 17

Install Guide

New Installation, multi-user

If you are installing Client/Server for 6+ users, you need to start at point 4 then return to point 2.

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Welcome to Sage Pastel Partner Version 17

Thank you for choosing Sage Pastel as your accounting software, support and service provider. This Sage Pastel Partner Version 17 installation guide assists you with the smooth and effortless installation of your accounting software, providing you with easy to follow, step-by-step instructions.

1. Hardware Requirements

These are the hardware and operating system software requirements for the system:

	Workstation	Server		
HARDWARE				
Minimum	Single Core 2 GHz	Single Core 2 GHz		
Recommended	Dual Core 2 GHz or higher	Dual Core 2 GHz or higher		
DVD Drive	Required	Required		
RAM				
Minimum	2GB	2GB		
Recommended	2GB or higher	128MB per simultaneous user who accesses the system		
SCREEN RESOL	UTION			
Minimum	1024 x 768	1024 x 768		
OPERATING SYSTEM				
Supported Operating Systems	Windows 7, Windows 8 and Windows 10	Windows 7, Windows 8, Windows 10, Windows Server 2003 and Windows Server 2008		

- Microsoft Office integration and email functionality requires you to have Microsoft Office version 2000 or above installed on your workstation.
- Windows XP Operating System NO LONGER SUPPORTED



Microsoft will no longer support Windows XP Operating System. This means Windows XP users will not receive Microsoft software updates, including security updates that help protect your POS system from viruses, spyware and other malicious software. If you are currently operating a Windows XP Operating System, we recommend you move to a supported operating system so you can continue operating in a secure environment. In moving to a new operating system, if your POS system also runs in Windows XP, we suggest you contact your primary support provider to discuss compatibility of your POS system with the new operating system.

2. Setting up your product in five easy steps

 Step One
 - Installing Sage Pastel Partner Version 17

 Step Two
 - Starting Sage Pastel Partner Version 17

 Step Three
 - Registering Your Software

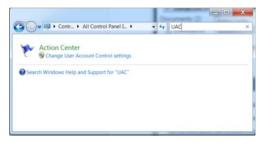
 Step Four
 - Registering your Workstation

 Step Five
 - Working with Companies

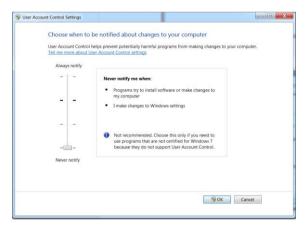
Windows 7

Select Start | Control Panel.

In the **Search** field type in **UAC** then click on **Change User Account Control** settings.



Move the slider to the option Never notify.



Click on the **OK** button and restart your computer.

Select Start button.

In the **Search** field type in **UAC** then click on **Change User Account Control** settings.



Move the slider to the option Never notify.

Tell me m		revent potentially harmful programs from making changes to you ount <u>Control settings</u>	ir computer.
		Never notify me when:	
-	-	Programs try to install software or make changes to my computer I make changes to Windows settings	
-	-	Not recommended. Choose this only if you need to use programs that are not certified for Windows 7 because they do not support User Account Control.	
Never	notify		

Click on the **OK** button and restart your computer.

Step one: Installing Sage Pastel Partner Version 17

Place the DVD in the DVD-ROM drive. The DVD should start up automatically. If the DVD does not start up automatically:

- Click Start on the Windows taskbar.
- Click the Run option.

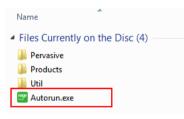
The Run window opens:

📨 Run			
	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.		
Open:	D:\Autorun.exe 🗸		
	🛞 This task will be created with administrative privileges.		
	OK Cancel Browse		

In the Open field, enter the DVD-ROM drive letter together with "\Autorun.exe".

The above screen shows what you would enter if your DVD-ROM is drive D.

Instead of this, you can click the $\ensuremath{\text{Browse}}$ button and select the file on the DVD-ROM.



Select the **Autorun.exe** file and then click the **OK** button on the Run screen to continue.

The system will automatically take you to the following screen:



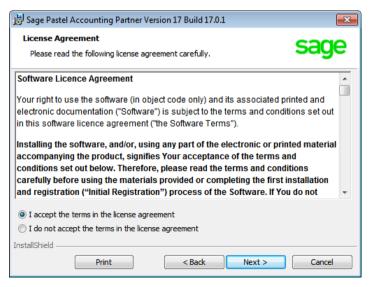
Click on the Install my product button and then click on the Partner button.



Click Next to continue.



The next screen that displays is the License Agreement screen:



Read the Licence Agreement, and delect "I accept the terms in the license agreement". The installation will not continue unless you accept the license terms.

Click on the Next button to continue.

Note that you can click the **Back** button at any time to review earlier screens.

The Setup Type screen displays:

📸 Sage Pastel Ac	counting Partner Version 17 Build 17.0.1	×				
Setup Type Choose the set	up type that best suits your needs.	sage				
Please select a	Please select a setup type.					
Typical	Install the typical program features for the English language.					
Custom	Select which program features you want installed. Recommended for users who want to install an additional language(s) and for those outside South Africa.					
InstallShield	< Back Next >	Cancel				

A **Typical** installation will install the program in English. If you wish to install additional languages, select the **Custom** option.

Click on the Next button to continue.

The **Destination Folder** screen will display:

😸 Sage Pas	tel Accounting Partner Version 17 Build 17.0.1
	to nor Folder At to install to this folder, or click Change to install to a different folder.
	Install Sage Pastel Accounting Partner Version 17 to: C:\Pastel17\ Change
	Share the Pastel folder (Everyone with full access).
InstallShield -	< Back Next > Cancel

In this screen, you choose where to install Sage Pastel Partner Version 17. Unless you have a good reason, you should not change the default installation folder. If you do wish to change the installation folder, click the **Change** button and select the folder to which you wish to install to.

You would typically only select to share the Pastel folder when installing in a multi-user environment.

Click on the Next button to continue.

The Ready to Install the Program screen displays.

Click the **Install** button to begin the installation.

The system displays a progress indicator:

Sage Pastel Accounting Partner Version 17 - InstallShield Wizard	23
sage	
DID YOU KNOW? Product Support via the Sage Pastel Contact Centre is just a click away with our new in-product live chat. *	
*Only available in South Africa.	
File: Copying new files, Directory: , Size:	
Car	ncel

Once the installation completes, the **InstallShield Wizard Completed** screen displays:

🔡 Sage Pastel Accounting Part	ner Version 17 Build 17.0.1
	InstallShield Wizard Completed
sage Pastel Accounting	The InstallShield Wizard has successfully installed Sage Pastel Accounting Partner Version 17. Click Finish to exit the wizard.
	Show the Windows Installer log
	< Back Finish Cancel

Click on the **Finish** button to complete the installation. Installation Guide | 13

Step two: Starting Sage Pastel Partner Version 17

You can start Sage Pastel Partner Version 17 in two ways:

i. Locate the Sage Pastel Partner Version 17 icon on your desktop:



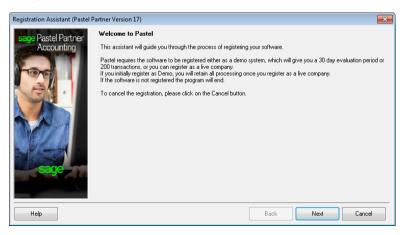
Double click the icon to start the program.

ii. Alternatively from the Start menu, choose All Programs I Sage Pastel I Accounting Partner Version 17 I Partner Version 17.

Step three: Registering your software (First register your Server/Main Computer)

You will have to register your package before you can make full use of it. To register, you need to obtain a Registration Code from Sage Pastel. You can do this by phone during normal working hours, or at any time via the internet. Registration is an annual activity, at no cost. You will also need to register if you install the system on another computer, or if you add more features. When you register, you do not lose any data you entered prior to registration.

The first time you start Sage Pastel Partner Version 17, the **Welcome** screen will display:



Click the Next button to continue. The Registration Type screen displays:



Here you choose the configuration you are registering:

Use the **Single User/Server Registration** option to register your package on the server or main computer.

Use the **Workstation Registration** option to link workstations to a multi-user registration. Once you complete the registration of the multi-user version using the **Single User/Server Registration** option above, use this option to link each workstation installation to the server registration.

This works as follows:

• The Server Path field activates. Use the icon to navigate to the Custom/Registration folder on the computer on which you registered the product. The Assistant will skip to the final screen.

Use the **Remote Server Registration** option to register a multi-user version, where the server is a non-Windows server. This will use the workstation you are on to write registration information onto the non-Windows server, after which you can register workstations as in the previous option.

Once you make your registration type choice, click on the **Next** button to continue.

The Registration Details screen displays:

Registration Assistant (Pastel Pa	artner Version 17)
sage Pastel Partner	Registration Details
Accounting	Please enter your company's registered name and base serial number. The Base Serial Number can be found on your Invoice, the back of the DVD cover or on the bottom of the Pastel box.
-00	Registering Online: If you have an internet connection, you can register online. This is the easiest method of registering your software. Enter the information required below and you will be taken to an online registration screen. Upon completion, your registration code will be entered into your Pastel product automatically.
	Register Online
The second second	The Client Services Team can be contacted on +27 11 304 3300 or clientservices@sage.com.
	To register the program as a demo version, select Demonstration. A demonstration version is valid for 30 days.
	Educational Pack
	Demonstration
sage	Base Serial Number
the state of the state of the state of the	Registered Name
	Select your country South Africa -
Help	Back Next Cancel

Work in this screen as follows:

- To register online, check the **Register Online** check box. This is the recommended method, as you can register at any time. If you deselect the selection box, please call us during normal business hours to register.
- To register a demonstration version, select the **Demonstration** check box. The **Select Your Country** drop down list activates, and you can choose your country. The Assistant will skip to the final screen.
- To register a live version, deselect the **Demonstration** selection box. Enter the **Base Serial Number** that is on your packaging or DVD, and enter your registered name in the **Registered Name** field. This name appears on all printouts you produce for any company. Note that for security purposes you cannot use generic names. You provide this name when you register.
- Once you enter registration details, click on the Next button to continue.

If you are registering for the first time, a screen will display showing the **Base Serial Number** entered into the Registration Wizard. Click **Next** and complete all the fields.

Web Registration					
Step 1 : Add my company details Step 2 : Add modules Step 3 : Registration Complete 🛞 Help					
* Required Field					
Company Details					
Company name	Sage Pastel	*			
Country	Select a country 💌 *				
Business type	Select a business type	*			
Contact name	*				
Telephone number	(Please enter	(Please enter at least one contact number)			
Mobile number					
Fax number					
Email					
Postal address	*	Physical delivery address	•		
	*		*		
	Postal code *		Postal code *		

If you purchased additional modules, enter the serial number for each module here. Click the **Complete Registration** or complete re-registration button to continue. Your registration code will be returned to Sage Pastel.

If you are not registering online, the **Registration Code** screen displays:

Registration Assistant (Pastel P	rartner Version 17)	X
sage Pastel Partner	Registration Code	
Accounting	Access Code 60449356	
	You need to provide your Access Code, the name in which you wish to register your product and contact information. Contact your distributor to provide you with your Registration Code. You will need to enter this Registration Code in this screen. Consult your installation guide for contact details for your local distributor.	
	To view a list of your nearest distributors:	
	South Africa	
	International	
sage	Registration Code	
Help	Back Next Cancel	

Installation Guide | 17

This works as follows:

- The Access Code displays.
- You now need to contact Sage Pastel Registrations and provide us with the company name, base serial number and this access code.

Register online or contact Sage Pastel Registrations.

To register by email, send all the required information to <u>clientservices@sage.com</u>. To register by phone, call Sage Pastel Registrations: 086 11 COVER (26837) during normal business hours.

Tip:

Registering online is faster, easier and more efficient than registering telephonically or via email. Save time and ensure accuracy by registering your product online.

When you receive your registration code, enter it into the **Registration Code field**. This is a long code, so ensure you enter it correctly.

Click on the **Next** button. If the code is incorrect, enter it again.

Once you complete the online or telephonic registration, the **Summary** screen displays.

Click on the Next button to finalise your registration.

The final step in the process for the server is to share your Pastel17 folder with the users that will be connection to Pastel. To share the Pastel17 folder, open the C: drive and right click on the Pastel17 folder.

From the menu, select **Share with** and select the users you want to share the folder with.

Once you have shared the Pastel17 folder, you need to create a mapped drive.

Select Computer on your PC and click on the Map network drive option.

Compute	· •			• 47	Search Corr	
File Edit View Tools	Help					
Organize 👻 System pr	operties Uninstall or change a program	Map network drive	Open Control Panel		•	0
Avorites Desktop Desktop Downloads Oropbox Secent Places Documents Music Pictures Pictures Pictures	Hard Disk Drives (1) Local Disk (C) 134 GB free of 698 GB Devices with Removable Storag DVD RW Dire (b) DVDAD Press DVD Free free of 335 GB UpF Home drive (P) Home drive (P)		tment (Q;)	Share (R)		
Computer Co	3.38 TB free of 5.99 TB	Traini	B free of 7.99 TB ng Server (Z:) B free of 7.99 TB	4.75 TB free of 7.99 TB		

On the next screen, select a drive letter and then click on the Browse button to locate your folder you shared. When you have located the folder, select the folder.

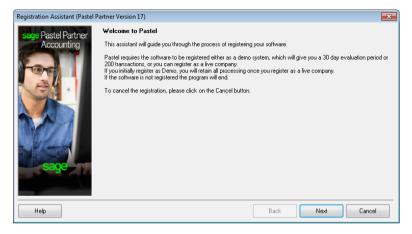
Confirm the check box **Reconnect at logon** is selected and click on the **Finish** button.

What network folder would you like to map?

Specify the	e drive letter for the connection and the folder that you want to connect to:
Drive:	Y: •
Folder:	\\PASJHBNBCRAIFRA\Pastel17 Browse
	Example: \\server\share
	Reconnect at logon
	Connect using different credentials
	Connect to a Web site that you can use to store your documents and pictures.
	Finish Cancel

Step four: Registering your workstations

The first time you start Sage Pastel Partner Version 17, the **Welcome** screen will display:



Click the Next button to continue. The Registration Type screen displays:

Registration Assistant (Pastel Pa	artner Version 17)	X	J		
sage Pastel Partner	Registration Type				
Accounting		ation single user installation, or if this is the main Pastel server PC, is option, click. Next to continue.			
	Workstation Registration				
	additional PC's on the netw on the main Pastel server F	ve already registered the main Pastel server PC and now wish to register tork. In order to register the workstation, you must have shared the Pastel folder C and mapped andwork drive from this PC to the server. For detailed steps on Help Me Install section on your Pastel DVD.			
	O Remote Server Registration	n			
	Select this option if you are	remotely registering the main Pastel server PC from another PC.			
- Chage	Pastel Server PC Path	C:\PASTEL17\CUSTOM\Registration\			
	Pastel Server PC Name	PASJHBNBCRAIFRA			
Help		Back Next Cancel			

Here you choose the configuration you are registering:

You will select the **Workstation Registration** option to link workstations to a multi-user registration. Once you complete the registration of the multi-user version using the **Single User/Server Registration** option above, use this option to link each workstation installation to the server registration.

Click on the zoom button next to the Pastel Server PC Path and search for the mapped drive you created on the server. Once you have located the mapped drive, select the **Custom** folder then select the **Registration** folder.

Registration Assistant (Pastel P	artner Version 17)	X
Accounting	Sing Browse for Servers Set Image: Set Servers On Image: Set Servers Image: Set Servers Image: Servers Image: Set Servers Image: Servers Image: Servers Image: Servers <tr< td=""><td>and now wish to register nut have shared the Pastel folder the server. For detailed steps on from another PC.</td></tr<>	and now wish to register nut have shared the Pastel folder the server. For detailed steps on from another PC.
Help	Back	Next Cancel

Click on the **OK** button then the **Next** button and the Summary screen will display.

Click on **Next** then **Finish** to complete the registration of the workstation.

Step five: Working with companies

When you have installed Sage Pastel Partner Version 17, the system adds the demonstration company to the **Open a Company** screen automatically.

To create a new company, you will select **File | New**. Choose the **Use Setup Assistant** option. This is the recommended method of creating a new company. The **Setup Assistant** takes you through a series of screens and creates a company with all required parameters set up. Once the **Setup Assistant** creates a company, you can work in it immediately.

If you want detailed information on this topic, consult the online help. To access this, click on the **Help** menu and select **Pastel Help**.

To open an existing company, choose **File | Open**. The following screen will display:

🔁 Open a Company	×
Software Sales (_DEM0)	Open
	Cancel
	Manage
	Add Company
C:\PASTEL17_DEMO	
Open Last Used Company on Startup	

Click on Add Company and you will see the following screen:

Sage Registration (Pastel Partner Version 17)	
Company Database	
PASJHBNBCRAIFRA	Locate Server
DEMO (PASJHBNBCRAIFRA)	Remove Server
	Set as Default Server
	Add Company
	Remove Company
	Activate Company
	DeActivate Company
	Show Removed
	Close
C:\PASTEL17\CUSTOM\REGISTRATION	

You will see your registered server. Click on **Add Company** and the following screen will display:

💷 Browse for Comp	oanies			×
🛛 c:				•
C:\				
Pastel17				
C:\Pastel17				
		OK	Ca	ncel

Browse to where the data is located.

- Double-click on the data folder and then click **OK**. Now click on **Close** and you will see your data in the list of companies available for you to open.
- If you are working in a multi-user environment, and the company you want to open resides on another machine, you will need to map a network drive to the data folder.

3. Managing your multi-user environment

In a multi-user environment, it is a good idea to identify and set up a Fixed Gateway for the Sage Pastel Partner Version 17 data files. This will be set up on the server or main computer.

i. What does the Gateway do?

- On a network where there is no dedicated server and the server which stores the data is also used to perform day to day functions, we refer to this type of setup as a peer-to-peer network.
- The Gateway facility allows you to access data on other computers on the network.
- A Gateway therefore needs to be selected. The PC which is selected as the Gateway will "act" as a server since it will control the access to the files and the computer on which the data (company) is stored.

ii. Which PC should be selected as the Gateway?

- It makes sense to select the PC with the best resources or specifications to act as the Gateway.
- Selecting the same PC where the data is stored to act as the Gateway also results in improved speed since the request for information to be supplied and the supply of the information takes place on the same PC.

iii. What are the consequences of not selecting a Gateway?

If no fixed Gateway is selected, then the system will operate on a "floating" gateway. This means that the first PC on the network to open that company will act as the Gateway for that data directory, until it is shut down or turned off. Potential problems exist in this scenario:

- The machine with the least resources or the poorest specifications may be the first to log in and act as the Gateway. This will result in poor speed performance for all the machines accessing the data.
- Further, if the user acting as the Gateway shuts down the machine or stops the Pervasive engine then all the other users will also encounter a problem (likely an error code 20).
- Data corruption will occur if a user is trying to perform an update when this happens.
- Since this is difficult to track, it is strongly recommended that a Fixed Gateway be selected.

How and where does the Gateway get set?

Go to the server or main computer which you will be storing the data (or you can do this from any other PC) and select **Start | All Programs | Pervasive | PSQL 10** and then click on **Utilities** and then **Gateway Locator**.

🧑 Gateway Locator Utility		
A Work Group Engine (WGE) can potentially open files on any machine in the network and serve the files for other users, thus becoming a gateway. This utility enables users to check which WGEs are currently assigned to serve as the gateway for the files in a directory.	Target Directory C:\Pastelt7_Demo UNC You can check the status of a directory by entering the path in the edit box and pressing the refresh button. Directory Status Refresh Permanent assignment The locator file does not exist in the specified directory. Exit	Click on this button to browse.

Next to the window for **Target Directory**, click on the browse button to browse to the company folder, for example **C:\Partner14\Demo**.

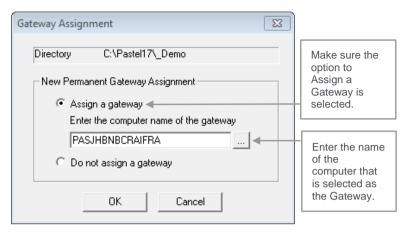
Note:

In the figure above the C: drive indicates the drive on the PC where the data will be stored, and Demo refers to the company name.

If you are doing this from another PC, you will browse for the PC on which the data is stored, and then for the company directory on that PC. If you have more than one company, then you will need to do this for each company, one at a time.

Under **Directory Status** you will see that the Gateway is unassigned. Click on **Change**.

This will display another window where you can select the Gateway PC (Ensure you have 'Assign a Gateway' selected).



- The system will default to the name of the PC that you are working from and you will be required to alter it if you are not performing this from the PC selected to be the Gateway.
- If you are doing this on the Gateway PC, the PC name is correct and no change is required.

Note:

If you have more than one company in Sage Pastel Partner Version 17 you can select to have a different PC act as the Gateway for each company. If one user processes more often in a particular company, then we suggest you make that user's PC the Gateway for that particular data set.

• The Gateway for a particular company can be changed to a different PC at any time by repeating the setup above.

4. Installing Client/Server (6+ Users)

Due to the complexity of a client/server installation, we recommend that you make use of a certified Sage Pastel Technical Installer.

A Client Server installation will require that you install your Pervasive software, unlike that of the previous sections where the installation was part and parcel of the program. The installation of your Pastel Accounting software will not change from the manner detailed previously. (See Section 2 - How to Install Sage Pastel Partner Version 17).

The installation process consists of 2 stages:

- Installing Pervasive Client Server on the Server.
- Installing Sage Pastel Partner on each of the workstations.

These stages are detailed in a few easy steps below. **Installing Pervasive Server software** requires Windows 2003 Professional or Windows Vista. Your client server version of Pervasive requires a license number. You obtain this from our Installations Team on +27 11 304 3830.

You will need the following information on hand to obtain this key:

- Pastel Base Serial Number
- Registered Name
- Bit Size 32 or 64 of the server (to find this, right click on My Computer and select Properties)
- Version of Windows or Linux
- Number of Users

You can only enter the license number of your Pervasive software after the installation process has been completed. Should you wish to register your Pervasive version much later, then you will need to make use of the temporary license keys which can be found on your product DVD. Explore the DVD and locate the Temporary License Keys.txt file, otherwise the system will install automatically with a temporary license which is valid for 30 days.

Installation of your Pervasive requires a number of steps:

- **Step one** Installing Pervasive software on the server.
- **Step two** Testing the Transactional Communication.
- **Step three** Installing Pervasive Client on the Workstation.
- Step four Installing and Registering Pastel Partner Version 17 on the server and each workstation.
- **Step five** Registering the Pervasive software on the server.

Step one: Installing the Pervasive software on the server

- On the server machine place the product DVD into the DVD-ROM drive.
- Once the menu option displays there are 6 choices.
 - Client32 for Windows (Installed on the client computer)
 - Server for Linus (Installed on the Server if the Server is a Linus PC)
 - Server32 for Windows (Installed on the Windows Server if the Server is a 32 bit Server)
 - Server 64 for Windows(Installed on the Windows Server if the Server is a 64 bit Server)
 - Workgroup for Windows (Installed on the computer when there are only 2-5 users on a workgroup network)

On the menu that displays, select the appropriate option.

The license agreement is the first screen that displays. Read and accept this agreement in order for the installation to begin.

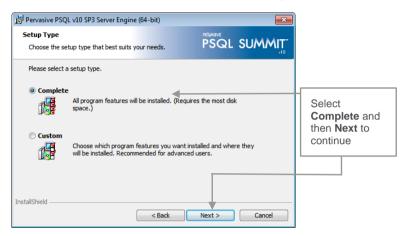
😸 Pervasive PSQL v10 SP3 Server Engine (64-bit) 🧮 🗾	2
License Agreement Please read the following license agreement carefully. Please read the following license agreement carefully.	
Pervasive Software Inc. Pervasive PSQL v10 Server Edition License Agreement IMPORTANT: DO NOT INSTALL THE ENCLOSED OR DOWNLOADED SOFTWARE UNTIL YOU HAVE READ THIS PERVASIVE PSQL LICENSE AGREEMENT ("AGREEMENT"). BY INSTALLING THE SOFTWARE, OR AUTHORIZING ANY OTHER PERSON TO DO SO, YOU, AND SUCH OTHER PERSON, IF APPLICABLE, ACCEPT THE TERMS AND CONDITIONS OF THIS AGREEMENT. IF YOU DO NOT AGREE TO THE TERMS OF THIS AGREEMENT, DO NOT INSTALL OR USE THE SOFTWARE AND WITH RESPECT TO SOFTWARE DELIVERED (I) ON PHYSICAL MEDIA, RETURN THE ENTIRE PACKAGE WITHIN TEN DAYS OF PURCHASE FOR A REFUND, (II) + © I accept the terms in the license agreement Print	
○ I do not accept the terms in the license agreement	,
InstallShield < Back Next > Cancel]

Click on Next to continue.

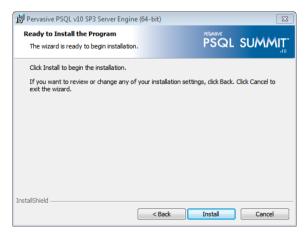
There are two types of installation options:

- **Complete** This installs all the Pervasive components and we recommend that this installation type be used.
- **Custom** This allows you to select the components you wish to install and is only recommended for advanced users.

Select Complete and then click on the Next button to begin the installation.



Click Install on the following screen to begin the installation.



Step two: Testing the Transactional Communication

- Once Pervasive is installed, select Start...All Programs... Pervasive...PSQL10...Utilities...Pervasive System Analyzer.
- The first test is the Network Connection test.
- Check all the check boxes to test active installation.

Pervasive System Analyzer	
System Analyzer Options Select the action you want to perform and specify the name and location of the log file.	
 C View loaded Pervasive modules If Test active installation If Test network communication If Test transactional engine If Test relational engine 	Select all options
Log File: C:\ProgramData\Pervasive Software\PSQL\Logs\PSALog.bt Append to the log file	
< Back Next > Cancel Help	

• On the next screen select the target machine.

Pervasive System Analyzer	
Test Network Communication Specify a machine name or IP address where Pervasive.SQL engine is running as the target machine to test network communication.	
Target machine: PASJHBNBCRAIFRA (Example: myservemame or 192.221.253.2)	Select the target machine
This test requires the Pervasive SQL relational and transactional engines running on the target machine specified.	
Advanced Settings	
< Back Next > Cancel Help	

• Once the test is complete, you will receive a summary of the test.

Pervasive System Analyzer	83
Test Network Communication Is your network communicating correctly?	1
	*
Successfully connected to PASJHBNBCRAIFRA 10.16.164.216 via TCP/IP protocol. Successfully transmitted 75 test messages via TCP/IP protocol during stress test.	
	*
	Print Print
< Back Next > Cancel I	Help

- Next you can test the Transactional Engine.
- Click on the Next button to continue.

Pervasive System Analyzer	
Test Transactional Engine The transactional engine is about to be tested to verify it is working properly.	
C I do not want to run the transactional tests. C I want to run the transactional tests. Please select the samples directory on the server where your database engine is	Select to run or not to run the transactional test.
instaled. the samples directory of the server where your database engine is	Leave the
Please select the tests you would like to perform on the transactional engine. ✓ Create Data File (write access required) ✓ Read Data File ✓ Update Data (write access required) ✓ Insert Data (write access required)	default directory or change the directory to the location of your data.
< Back Next > Cancel Help	L

- Once this has been completed and no errors were found, the test results will be displayed.
- Click on the **Next** button to continue.
- The second test that is performed is a Relational Engine test.

 The system will default to 'I want to run the relational tests', click on Next to continue.

Pervasive System Analyzer	
Test Relational Engine The relational engine is about to be tested to verify that SQL Connection Manager on the engine is communicating as expected.	
I do not want to run the relational tests. I want to run the relational tests. Please enter the name of the engine data source you would like to test.	Run the relational test.
Machine Name: WIN-PLR9N41NFUC	Ensure the Machine Name is correct.
✓ Update Data (write access required) ✓ Insert Data (write access required) < Back	

Once the tests have been completed and no errors were found, click on $\ensuremath{\textit{Next}}$ and then $\ensuremath{\textit{Finish}}.$

Step three: Installing Pervasive Client on the Workstation

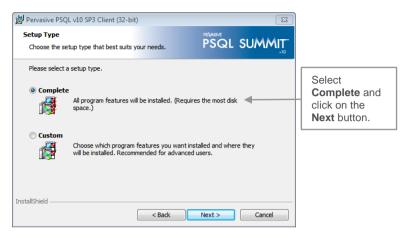
On each workstation, insert the DVD into the DVD-ROM drive.

- Choose Pervasive Client for Windows.
- The installation screen will be displayed. Click on **Next** to begin the installation process.
- Accept the license agreement and click on **Next** to continue.
- Select the option Run as an Application. Only if you are installing on Terminal Service system will you select the option Run as a Service.
- Click on the **Next** button to continue.



- There are two types of installation options:
 - Complete This installs all the Pervasive components and we recommend that this installation type be used.
 - Custom This allows you to select the components you wish to install and is only recommended for advanced users.

• Select **Complete** and then click on the **Next** button to begin the installation.



- On the following screen click on Install to begin the installation process.
- A progress bar will be displayed indicating the status of the installation.
- Once the installation is complete, you can run a network test to confirm that the installation was successful.
- Select Start...All Programs...Pervasive...PSQL10...Utilities...Pervasive
 System Analyzer

• Provide either the machine name of the server or the IP address.

Pervasive System Analyzer	
Test Network Communication Specify a machine name or IP address where Pervasive.SQL engine is running as the target machine to test network communication.	
Target machine: PASJHBSERVER1	Enter the name or the IP address of the server machine.
Advanced Settings	
< Back Next > Cancel Help	

- Once the communication test has been completed and no errors were detected, click on Next to continue.
- The Transactional Test Engine screen will be displayed.

Pervasive System Analyzer	
Test Transactional Engine The transactional engine is about to be tested to verify it is working properly.	
I do not want to run the transactional tests. I want to run the transactional tests. Please select the samples directory on the server where your database engine is installed.	Select to run the transactional test or not
CNPVSWAsamples Please select the tests you would like to perform on the transactional engine. Iv Create Data File (write access required) Iv Read Data File Iv Update Data (write access required) Iv Insert Data (write access required) Iv Insert Data (write access required)	Leave the default directory or change the directory to the location of your data.
< Back Next > Cancel Help	

- Once the Transactional Test has been completed and no errors were detected, click on Next to continue.
- The **Relational Test Engine** screen will be displayed.

• Ensure you have the correct machine name in order to proceed.

Pervasive System Analyzer	
Test Relational Engine The relational engine is about to be tested to verify that SQL Connection Manager on the engine is communicating as expected.	
 C I do not want to run the relational tests. I want to run the relational tests. Please enter the name of the engine data source you would like to test. Machine Name: WINPURGNAINEUC Engine DSN: demodata Please select the tests you would like to perform on the relational engine. I create Table (write access required) I head Data I update Data (write access required) I neart Data (write access required) I neart Data (write access required) I neart Data (write access required) I set Mata 	Ensure you have the correct machine name and click on Next.

Once the tests have been completed and no errors were found, click on **Next** and then **Finish**.

Note:

You will need to install the Windows Client on each of the workstations and ensure that all the tests are successful.

Step four: Installing and Registering Sage Pastel Partner Version 17 on the server and each workstation.

You will be required to install Sage Pastel Partner Version 17 on the server and each of the workstations. Follow the instructions detailed in the **Section 2 - How to Install Sage Pastel Partner Version 17.**

Once Sage Pastel Partner is installed on the workstations, you will need to map a drive to the Pastel17 folder on the server. Full sharing must be enabled on this folder.

On the workstations, the properties of the Sage Pastel Partner Version 17 icon on the desktop will need to be changed:

- Right click on the Pastel Partner Version 17 icon.
- Select Properties.
- On the **Shortcut** tab, insert the mapped drive letter in the Start in field, e.g. P:
- Click Apply and then OK.
- Repeat this process on each workstation.

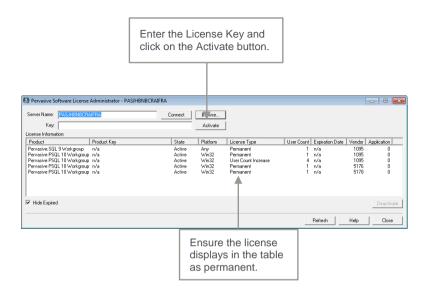
Before registering the Pervasive software, you will need to register Sage Pastel Partner Version 17 both on the server and on the workstations. Please see the instructions in **Section 2 - Registering Your Software**.

Step five: Registering the Pervasive software on the server

To register the Pervasive Server engine, you will need your Pervasive License Key. The license key can be obtained directly from Sage Pastel and needs to be entered prior to your temporary license expiring. You can contact the Installations Team on +27 11 304 3830 to obtain your license key. Please have your Sage Pastel Partner Version 17 serial numbers available.

Follow these steps to license the engine:

- Click on **Start** and then **Programs**.
- Click on **Pervasive** and then **Pervasive.SQL**.
- Now select Other Utilities and then License Administrator.
- When the License Administrator screen displays you will need to enter your Pervasive License Key in the License Key field and click on Apply License.
- Check that the license displays in the **Applied Licenses** table.



Once the licensing is completed, you can exit and begin making use of your Sage Pastel Partner Version 17 application.

5. Troubleshooting your installation

In order to minimise potential problems, we recommend reading this section. For further troubleshooting information, please refer to the Troubleshooting section in the online help.

Prior to installation:

- Ensure that the minimum system requirements are met. These requirements are detailed at the beginning of this guide.
- Restart your system before installation to ensure that the resources for the installation process are cleared.
- Login as the Administrator of the PC this will ensure that you have all the necessary rights in order to install your software.
- Disable any virus checking software for the duration of the installation only. This is necessary because anti-virus software blocks writing to system files (e.g. *.VBX, *.DLL, *.OCX files) and the updating of some of these files may be required during installation.

Tip:

Should there be a problem in disabling the anti-virus software it may need to be uninstalled completely and reinstalled after the installation. This is for the same reasons as above.

Troubleshooting a Status 116

This error will only occur in a workgroup or peer-to-peer environment. Essentially whichever workstation logs in first becomes the Gateway computer (see **Section 3 - Managing your multi-user environment**). If you receive a Status 116 error, it means that there is a problem communicating with the Gateway machine. This error is related to the network communication and protocols and therefore it is essential that you ensure these are set up correctly when making use of Pervasive.

We suggest that you make use of a certified Sage Pastel Technical Installer to assist with the setup of your Sage Pastel Partner Version 17 in a network environment.

Error Code 20 - Record Manager Inactive

This error occurs when the Pervasive Database Engine is not running on the local machine or the server.

You should work through the following possibilities in sequence:

- Missing or Incorrect Installation
- Firewall Settings
- Anti-Virus Settings

i. Missing or Incorrect Installation

Error 20 can occur if Pervasive was installed incorrectly, or if an older version is present on the workstation.

To determine whether Pervasive is running and which version is running:

1. When you start Sage Pastel, in the Windows Taskbar, at the bottom right corner where the time displays, there should be a Pervasive icon:



If this icon does not display, you should install Pervasive manually.

2. If you are on a workstation in a client server environment, right click on the desktop icon for Sage Pastel Partner and click on **Properties**. **The Start In** should be the path to **Sage Pastel** on the server.

Accounting P	artner V17 Properties	
Security	Details Previous Versions	
General	Shortcut Compatibility	
Target type: Target location:	Application	
Target: Start in:	Sage Pastel Accounting Partner Version 17	Change the Start in drive letter to the drive letter of
Shortcut key:	None	your mapped network drive.
Run:	Normal window 🔻	
Comment:	Change Icon Advanced	
	OK Cancel Apply	

ii. Firewall and Anti-virus Settings

If you have a firewall installed on the workstation, it may be inhibiting communication between a workgroup or client/server version and causing an error 20. If this is the case, you have to tell the firewall software to allow such communication. We show you how to control this in using the firewall built into Windows. If you are using a different firewall, consult the software's user guide.

To check and set firewall settings in Windows

- 1. In Windows, open the Control Panel and double click the **Windows Firewall** option.
- 2. Click on the **Change notification settings** link.
- Ensure the Notify me when Windows Firewall blocks a new program checkbox is checked. If it is not checked, then check it and click OK, and try to access Pervasive once again. If there is no message from Windows Firewall, then this is not the problem.
- 4. If you receive a message from **Windows Firewall**, start it up again as above, and select **Advanced Settings**.
- 5. Click on Inbound rules and then click on New Rule.
- 6. Add the following:
- Select **Program** and click on the **Next** button. Browse to the program C:\PVSW\Bin\w3dbsmgr.exe
 - Click Open then Next.
 - Select the option Allow the connection and click on the Next button.
 - Select which computers the rule applies too and click on the Next button.
 - Give the rule a name and then click on the **Finish** button.
- Click the **Port** option.
 - Specify the following port and click on the **Next** button:
 - 0 1583
 - **3351**
 - Select the option Allow the connection and click on the Next button.
 - Select which computers the rule applies too and click on the Next button.
 - Name the rule and click on the **Finish** button.
- Close the Windows Firewall.
- This must be done for inbound and outbound connections.

iii. Anti-virus blocking network communication

If you have anti-virus software installed on your workstation, it could be causing an issue that gives rise to the error 20. You should disable the anti-virus software and see if this helps. If it does, please get your Network or IT administrator to set the anti-virus software to allow Pervasive communication across the network.

iv. Using Pervasive System Analyzer to test network communication

- Click on Start then Programs.
- Click on Pervasive System Analyzer.
- A window will be displayed on the screen, click on Next.
- Select the option Test Active Installation, and ensure all the options below that are also selected.

vasive System Analyzer	
System Analyzer Options Select the action you want to perform and specify the name and location of the log file.	
Analyze system or Archive components Restore archives Delete components or archives Wew loaded Pervasive modules Test active installation	
Test retwork communication Test transactional engine Test relational engine Log File:	Select the options to test.
C.\Program Files (x86)\Common Files \Pervasive Software Shared \PSA\PS/	
< Back Next > Cancel Help	

- Now select the **Server** machine on the network, this will test network communication between the **Server** and the **Workstation**.
- Click on Next.

A summary indicating that ALL information sent has been received should display.

Pervasive System Analyzer	×
Test Network Communication Is your network communicating correctly?	
Successfully connected to 192.168.159.1 via TCP/IP protocol. Successfully transmitted 75 test messages via TCP/IP protocol during stress test.	* III
l P	Print
< Back Next > Cancel Help	

- On the next screen run the Transactional Engine Test.
- Ensure that the results are successful.
- Click **Next** to proceed.
- Now run the **Relational Engine Test** and make sure it is successful.
- If errors were encountered on any of these tests, it is best that you request your network or hardware technician to correct these.

6. Keyboard Shortcuts

Function / Shortcut Key	Operation	Comments
F1	Access Help	The help facility is available by pressing F1 on any screen in your Sage Pastel product
F2	Open the Note facility	Press F2 to open the Note facility, which can also be linked to customer and supplier accounts.
F3	Allocate Open Item transactions	F3 allows you quick access to the Open Item matching screen when processing in journals or cashbooks.
F4	Open the Price Search facility	Useful for instant access to inventory items' selling prices. Also shows quantities on hand of inventory items.
F5	Zoom in on a record	F5 opens a zoom screen to perform various record editing and enquiry functions.
F6	Add a new record	Quickly create a customer, supplier, general ledger or inventory account at the touch of a button.
F7	Reconcile function	The F7 function key allows you to reconcile your physical bank statement with Sage Pastel's cashbook transactions quickly and easily.
F7	Modify a record when on a Zoom screen	Modify or edit a customer in the cashbook, supplier or general ledger account when zooming in for either of the above. Note: the F7 function only works when on a zoom screen for an account.
F8	Switch between VAT inclusive and exclusive transactions	When processing in the cashbook or journal, press F8 to change an amount from exclusive to inclusive or vice versa. Note: this function only works in cashbooks and journals.

F9	Open the calculator	F9 opens the calculator from Windows. Select View on the calculator and then click on Scientific for access to many additional, useful calculator functions.
F12	Return to the previous column	When processing in documents, journals or cashbooks, and you are in the Account field, you cannot move off the field without selecting an account. Pressing F12 while on the field will move you to the previous field without forcing you to select an account.
Ctrl + H	Edit customer/supplier address details	When processing document lines, you can use Ctrl + H to jump to the Delivery Address field instantly. Note: you need to be on the transaction lines to use this shortcut.
Ctrl + L	Insert lines on invoices	When processing documents, after selecting the customer/supplier account, you can use Ctrl + L to jump straight to the lines without tabbing through the rest of the fields in the header section. Note: you need to be on a header field to use this shortcut.
Ctrl + R	Copy postal address to delivery address field or vice versa	In the Edit Customer/Supplier menu, you can use this function to copy your delivery address to your postal address field, and vice versa.

7. Useful Contact Details

Cape Town Switchboard	+27 21 522 7400	ctsales@pastel.co.za
Durban Switchboard	+27 31 537 7100	dbnsales@pastel.co.za
Johannesburg Switchboard	+27 11 304 3000	info@pastel.co.za
Registrations	+27 86 112 6837	clientservices@sage.com
Product Sales	+27 11 304 3600	sales@pastel.co.za
Training	+27 11 304 3670	training@pastel.co.za
Installation Assistance	+27 11 304 3830	installations@pastel.co.za
Client Services	+27 86 112 6837	clientservices@sage.com
Pastel Payroll	+27 11 304 4000	info.pastelpayroll@sage.com
International Switchboard	+27 11 304 3400	info@sagepastel.com
Support	+27 11 304 3300	support@pastel.co.za

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