sage Pastel Partner Accounting

Install Guide

New Installation, single user

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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	AAM				
Minimum	2GB	2GB			
Recommended	2GB or higher	128MB per simultaneous user who accesses the system			
SCREEN RESOLU	JTION				
Minimum	1024 x 768	1024 x 768			
OPERATING SYS	DPERATING SYSTEM				
Supported Operating Systems	Windows 7, Windows 8 and Windows 10	Windows 7, Windows 8, Windows 10, Windows Server 2003 and Windows Server 2008 R2 +			

- Microsoft Office integration and email functionality requires you to have Microsoft Office version 2000 or above installed on vour 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 - Working with Companies

You need to turn the UAC off before you start the installation.

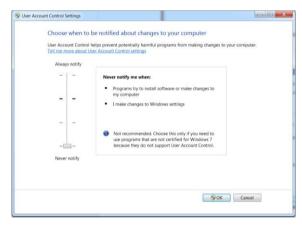
Windows 7

Select Start | Control Panel.

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



Move the slider to the option **Never notify**.



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

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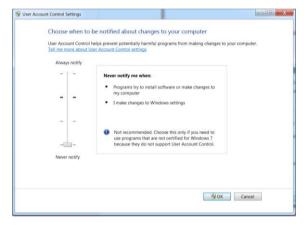
Windows 8 and Windows 10

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.



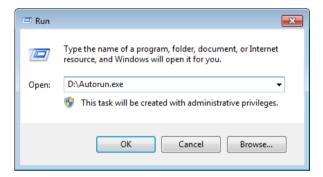
Click on the **OK** button and restart your computer.

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.

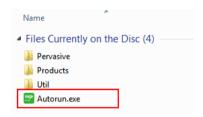
The Run window opens:



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

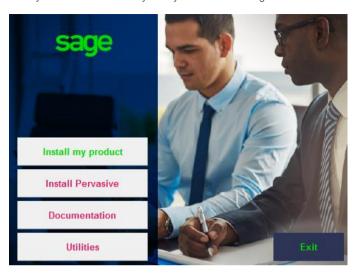
The above screen shows what you would enter if your DVD-ROM is drive D.

Instead of this, you can click the **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:

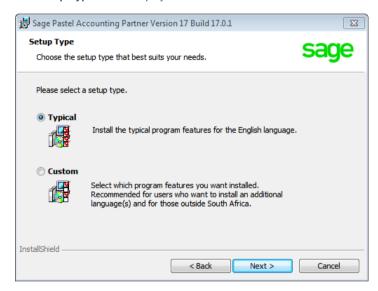


Read the Licence Agreement, and select "I accept the terms in the license agreement". The installation will not continue unless you accept the license terms.

Click on the **Next** button to continue.

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

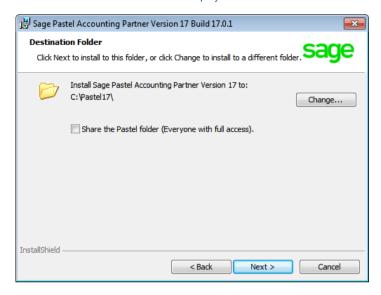
The **Setup Type** screen displays:



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:



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.

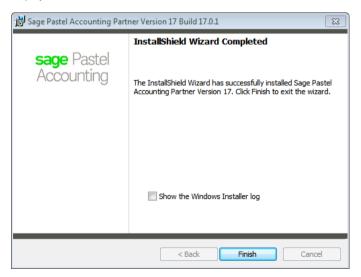
The Ready to Install the Program screen displays.

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

The system displays a progress indicator:



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



Click on the Finish button to complete the installation.

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.



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

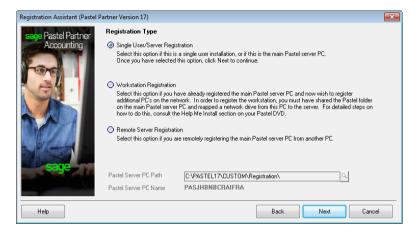
Step three: Registering your software (Single User)

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:

As you are registering as a single user, you will select the **Single User/Server Registration** option. This option is also selected when you are registering as a:

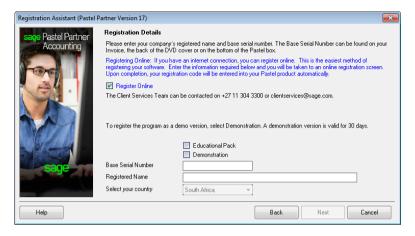
- Multi-user Server:
- Demonstration.

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 **Local/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 have selected the Local/Server Registration option, click the **Next** button to continue.

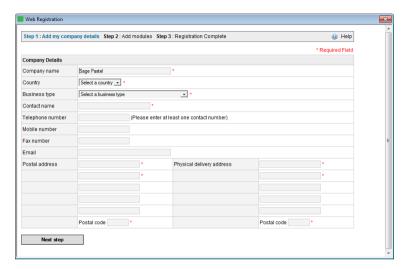
The Registration Details screen displays:



You have the following options on the screen:

- 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 checkbox, 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 checkbox. 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 have entered the 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



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:



This works as follows:

- The Access Code displays.
- You now need to contact Sage Pastel Client Services 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: Clientservices@sage.com

Alternatively call the following numbers during normal business hours:

- +27 86 112 6837
- +27 11 304 3300

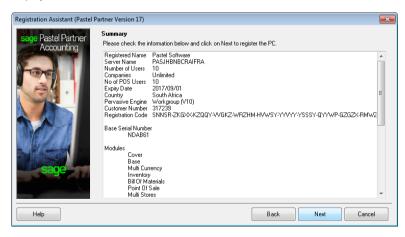
Tip:

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 **Next** to finalise your registration.

Step four: 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.

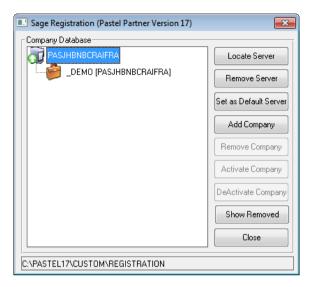
To create a new company, you will select **File | New**. Choose the **Use Setup Assistant** option. This is the recommended method of creating a new company. The **Setup Assistant** takes you through a series of screens and creates a company with all required parameters set up. Once the **Setup Assistant**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

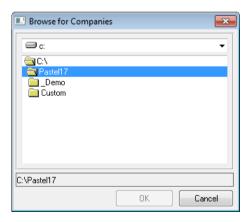
To open an existing company, choose **File | Open**. The following screen will display:



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



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



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.

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.

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.

To determine whether Pervasive 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. First confirm the Firewall and Anti-virus settings are correct as outlined below.

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:

- 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.

4. Pervasive Installation / Repair

Only if you have received errors and need to install Pervasive manually must you follow these steps.

Place the DVD in the DVD-ROM drive. The DVD should start up automatically

The system will automatically take you to the following screen:

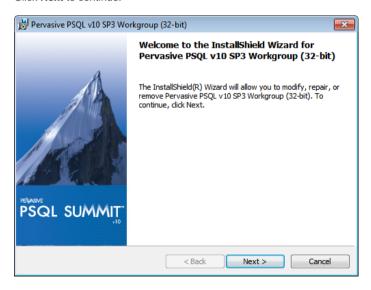


Click on the Install Pervasive button.

On the next screen, click on the Workgroup for Windows button.



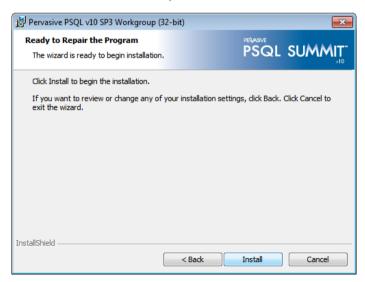
Click Next to continue.



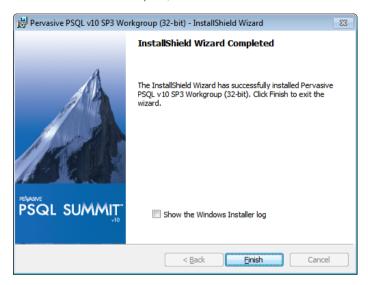
If Pervasive installed but did not install corectly, you will recive the following screen. Select the Repair option and click on the **Next** button.



Click on the **Install** button to complete the installation.



Once the installation is complete, click on the **Finish** button.



It is recommended that you restart your computer before trying to open Pastel again.

5. 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.

6. 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

www.sage.com

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