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Client Care Desktop - Solo Installation Procedure v4.3.2

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Overview

This document has been created as a guide to Install Client Care Desktop v4.3 Solo to Client Care Desktop Solo v4.3.2. We recommend that this Installation is performed by your internal or external I.T. department.

If you have opted for an un-assisted installation and encounter a problem or are not confident regarding the install, we would recommend contacting our support department on 0800 028 0033.

Please be aware that CFSL Support Team can only advise you regarding the installation procedure and if you require us to perform the install, then this will need to be scheduled for availability and may incur a charge.

 We also advise that you backup your database files prior and post upgrade and process all EDI messages and downloads.

NB Priority will all ways be given to pre-booked installations and we cannot guarantee that we will have installation technicians available if not pre booked.

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1 System Requirements

Workstation

Operating System	Minimum	Recommended
Windows 7 Ultimate, Professional, Home Premium*	1 GHz or faster 1 GB RAM - DirectX 9 graphics device with WDDM 1.0 or higher driver - DVD drive	2 GHz or faster 2 GB RAM - DirectX 9 graphics device with WDDM 1.0 or higher driver - DVD drive
Windows Vista Ultimate, Business, Home Premium (SP 2)*	1 GHz or faster 1 GB of RAM 1024x768 or higher resolution video adapter and display - DVD drive	2 GHz or faster 2 GB of RAM 1024x768 or higher resolution video adapter and display - DVD drive
Windows XP Professional, Home Edition (SP 3)*	1 GHz or faster 1 GB of RAM 1024x768 or higher resolution video adapter and display - DVD drive	2GHz or faster 2 GB of RAM 1024x768 or higher resolution video adapter and display - DVD drive

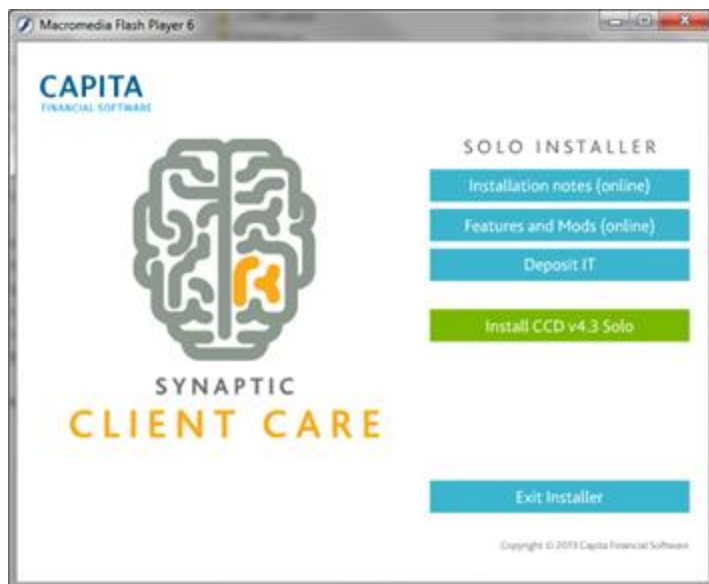# CAPITA

1.1 Setup Requirements

Before Client Care Desktop can be installed you will need to ensure you have the following:

- CCD v4.3.2 Solo DVD
- Run a Backup of current databases files
- Have a record of your Word and PDF stores (this information is located in Setup>Technical)

NB Please note that your current Client Care Desktop system must have in date licences, with at least a week left before expiry.

2 Installation Procedure

To run the Client Care Desktop Solo v4.3.2 installation, place the DVD into the drive and you will see the following Splash screen (Fig 1)
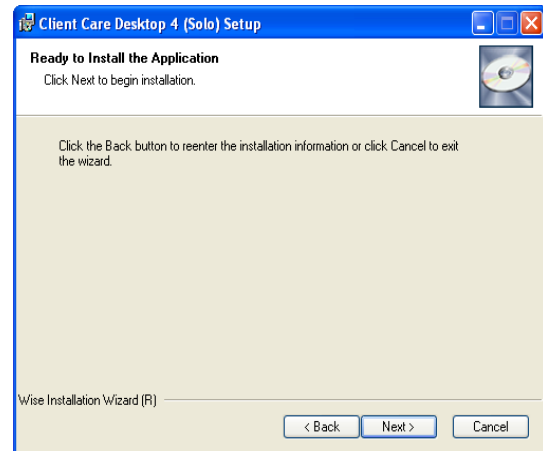

(Fig 1)

Initially you will be prompted in relation to the Capita Financial software ODBC installer.

From here you will need to select 'Install CCD v4.3.2 Solo' this will start your Installation. (Fig 1)

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The installer will then welcome you to the installation wizard. Click 'Next' (Fig 2) Click 'Next' again. (Fig 3)
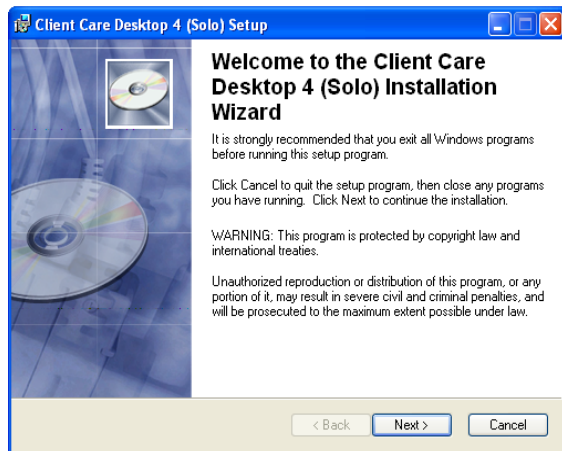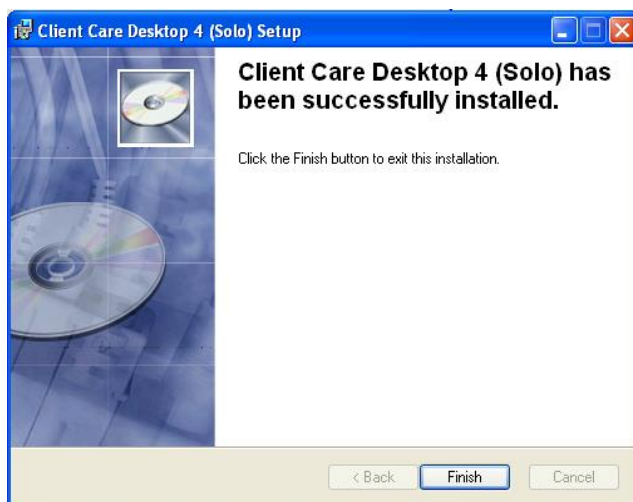

(Fig 2)

(Fig 3)

Once the data import has finished, your Installation is complete, and the following box will appear (Fig 11). Click 'Finish' to exit the Client Care Desktop 4 (Solo) Setup wizard.

(Fig 11)

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## 3 Setup Procedure

Once CCD v4.3.2 Solo has been installed you will have the shortcut icon located on your desktop (Fig 5)

(Fig 5)

### 3.1 Licenses

The first time you launch CCD v4.3.2, you will be asked to licence your software (Fig 6). Here you will need to enter your licence codes. Your licences will have been sent to you via email (If for whatever reason you are without a working license please contact our support staff on 0800 028 0033). You will need to enter your CCD1 licence first. To do this select the CCD1 licence and copy and paste into the clear box as detailed in Fig 6 and Fig 7
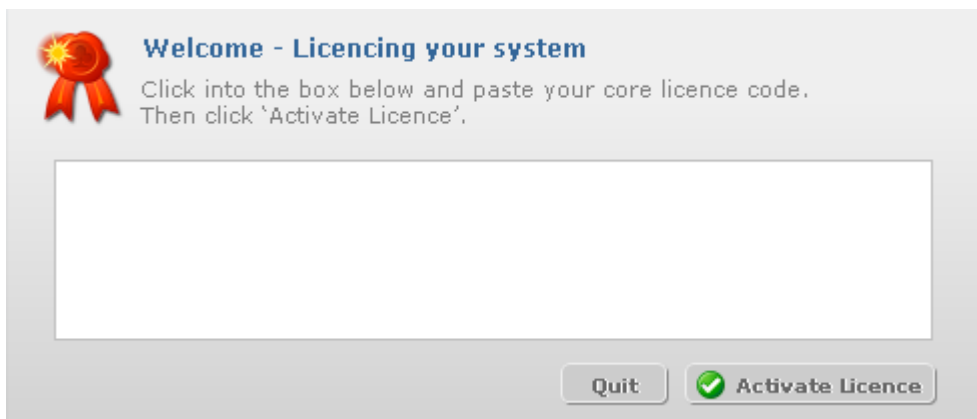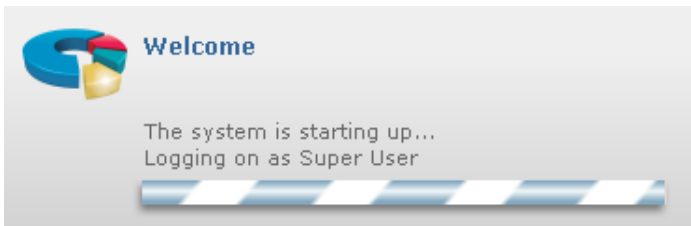

(Fig 6)
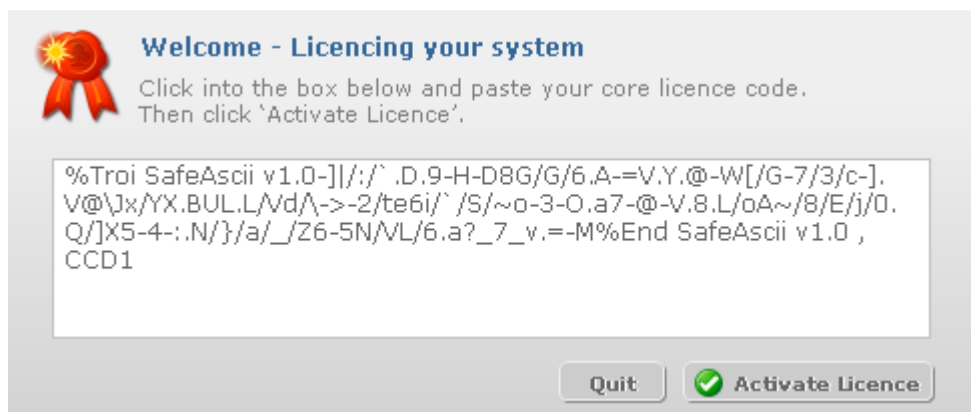
(Fig 7)

Once you have entered your licence click on 'Activate Licence' (Fig 7)

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This will open CCD (Fig 8)

(Fig 8)

3.2 Creating a Staff Member

Once the system has finished loading you will be taken to the System setup wizard (Fig 9). You will need to go through each section filling in the required details.
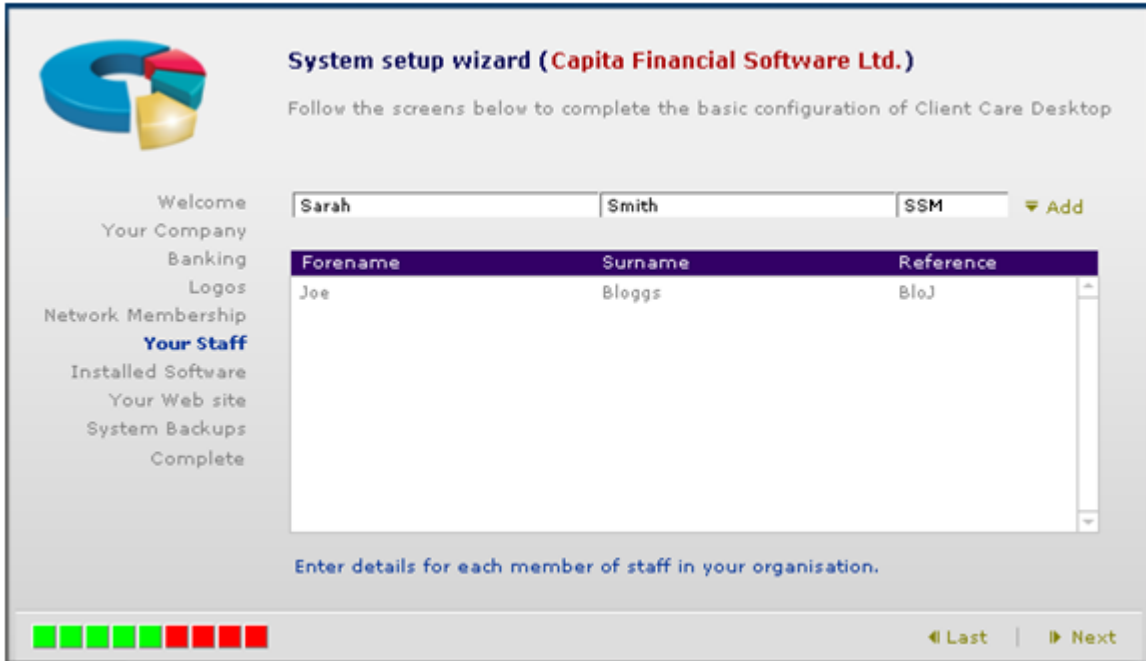

(Fig 9)

When you reach 'Your Staff' you will need to enter a member of staff into the system. This will take you to 'Set-up the System Administrator Account' (Fig 10) where you will need to enter the users name and make a note of the 'Login ID' (Fig 10). The example used here is Joe Bloggs with his Login ID as 'BLOJ'

(Fig 10)

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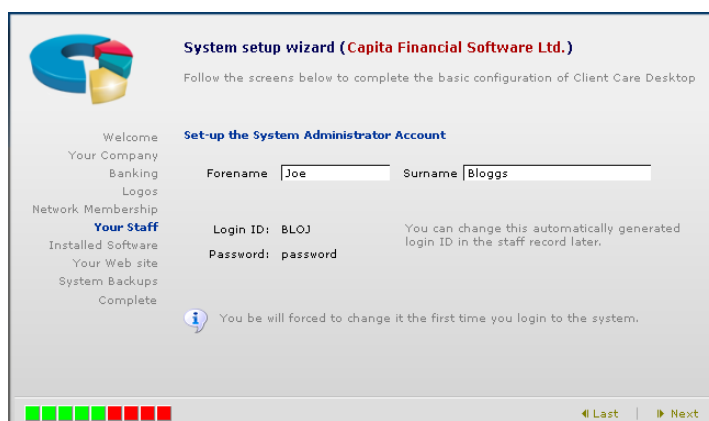
From here click on 'Next' and you will be able to add other staff members into the system (Fig 11).

Please note: The 'Login ID' will not be generated automatically. You will need to enter the Login ID yourself. Please ensure that this is at least 3 characters e.g. SSM
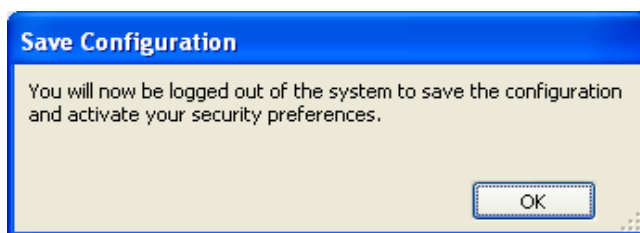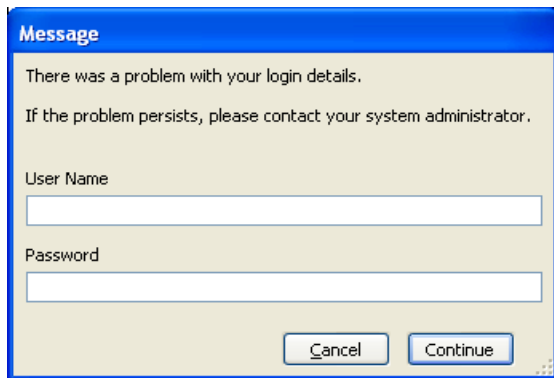

(Fig 11)

Once you have finished entering your staff members continue to go through each page until you have completed the System setup wizard.

Upon clicking 'Finish' the following message will be displayed (Fig 12)

(Fig 12)

Clicking "OK" will log you out and take you to the login screen (Fig 13)

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(Fig 13)

Now enter the User Name that you have created in the staff list (Login ID). You will be asked to set this as your User Name. Click 'OK' and you will need to enter the Login ID into the 'User name' box (Fig 14)

**Please note:** By default all user passwords are set to 'password'
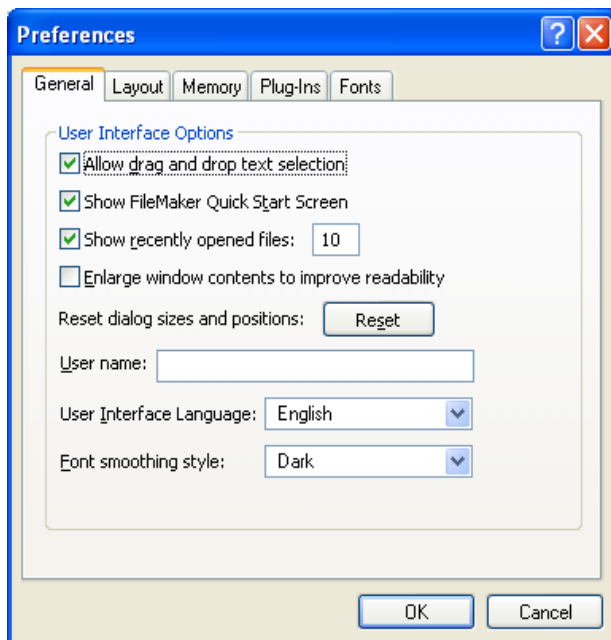
(Fig 14)

Upon clicking 'OK' you will be asked to change your password. Once you have changed your password you will be logged into the system for the first time and taken to the CCD v4.3 Main Menu (Fig 15)

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(Fig 15)

3.3 Additional Licences

Please note that once you have completed the setup, you will need to go back and enter any other licences you should have in your system. To do this, go to 'Setup' from the Main Menu (Fig 15) and select 'User licence' (Fig 22).
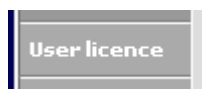
(Fig 22)

To enter a new licence click on the 'New licence' option on the left hand menu (Fig 23)

(Fig 23)

3.4 Backing up CCD

It is important that you perform a backup of your data on a daily basis. When setting up your backup you must ensure that you are backing up your Word and PDF stores along with your database files. These can all be found within the Link folder on the C: drive of your machine. There is also an option within CCD to run a backup of the database files. This can be found in the 'Setup' menu (Fig15) under the 'Backup' option. In here you can setup the location of where the files will be backed up to and perform the backup process.

> **NB** Backups do not happen automatically and you will have to perform these manually on a daily basis.

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3.5 Setting up System Territory

Once you have completed the upgrade you will need to open one of the CCD Workstations. From the Main Menu select 'Setup' (Fig 40). Then select 'Technical > Regional > Territory' to confirm you are in the correct Territory (Fig 41).
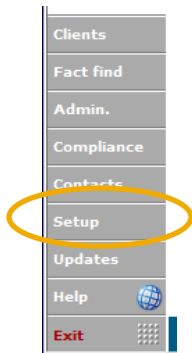

(Fig 40)

If you are unsure which Territory you need to select, please call the Helpdesk (0800 028 0033) for further advice.
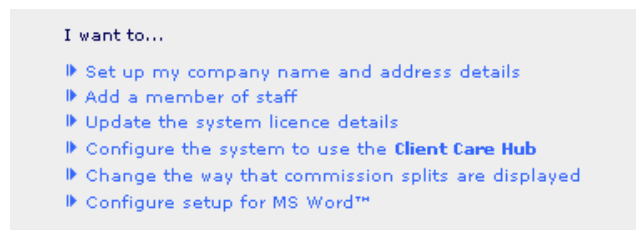

(Fig 41)

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3.6 Setting up Word and PDF

To setup your Word and PDF stores, you will need to enter 'Setup' from the main menu (Fig 42)

(Fig 42)

Once in the Setup menu there will be a set of Blue links, select 'Configure setup for MS Word' (Fig 43).

I want to...

▶ Set up my company name and address details
▶ Add a member of staff
▶ Update the system licence details
▶ Configure the system to use the **Client Care Hub**
▶ Change the way that commission splits are displayed
▶ Configure setup for MS Word™

(Fig 43)

This will launch the 'Word Exporter Configuration' where you can change the location for the 'Template file' and the 'Document Store' if you need to (Fig 38).
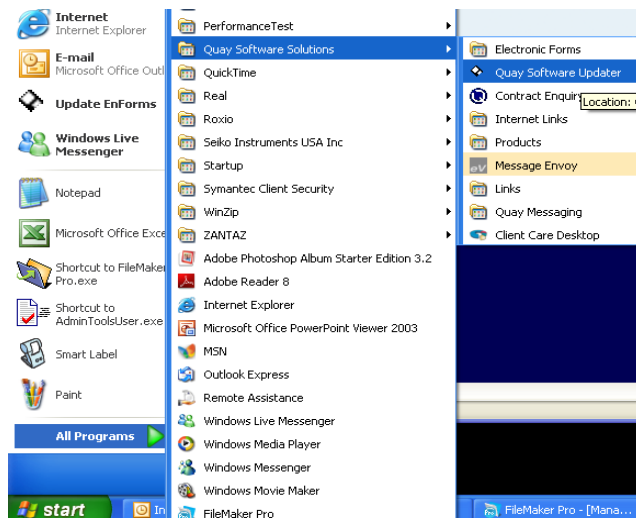

(Fig 38).

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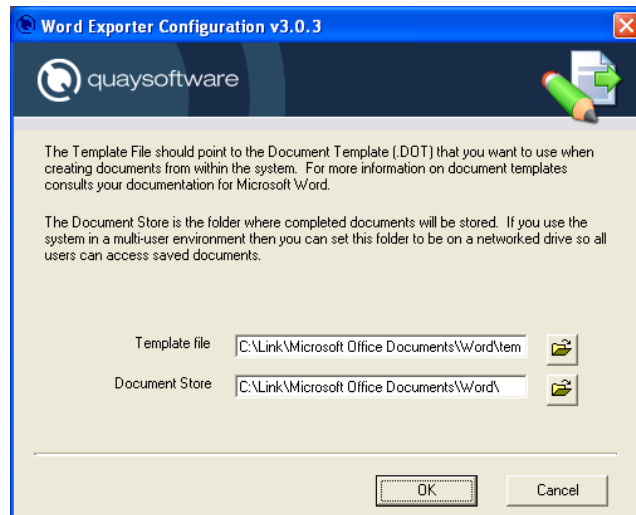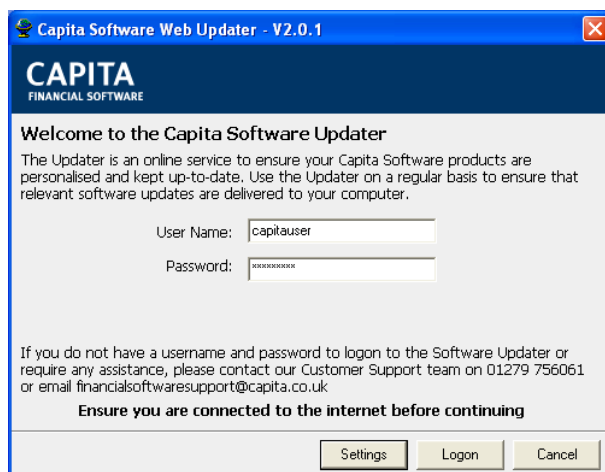
3.7 Quay Software Updater

You are now required to run the Quay Software Updater.

To run the updater you will need to go to: 'Start Menu > All Programs > Quay Software Solutions > Quay Software Updater' (Fig 39).
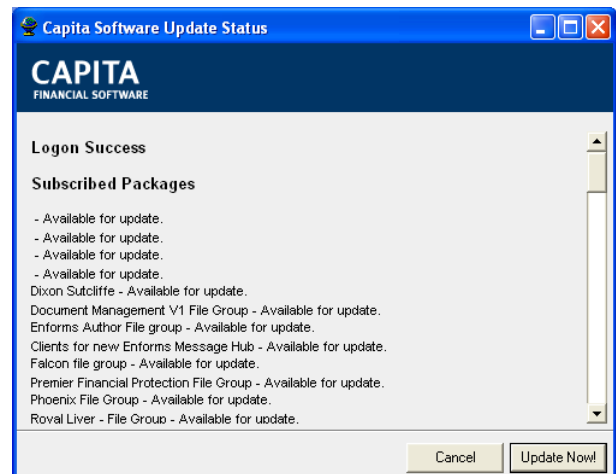

(Fig 39)

This will display a User Name and Password box (Fig 40). If you do not have these details please contact the Helpdesk (0800 028 0033).
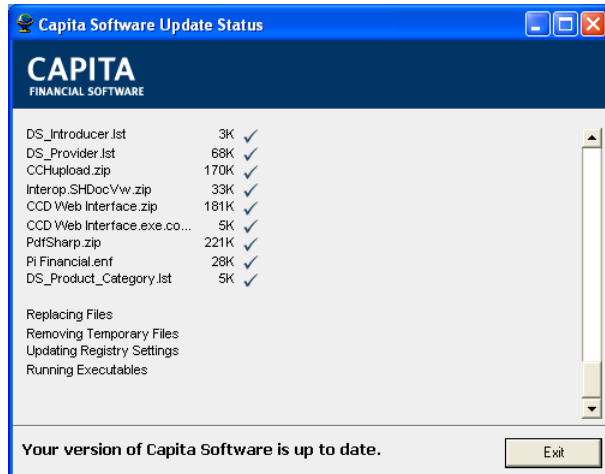

(Fig 40)   *(Fig 41)*

Once you have entered your details the following will be displayed listing all the items that need to be updated. (Fig 41)

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Clicking 'Update Now!' will update all the packages that you are subscribed to. Please run once a week to ensure that CCD is kept up to date. Once the list has been downloaded, click 'Exit' to close this application (Fig 42).

(Fig 42)