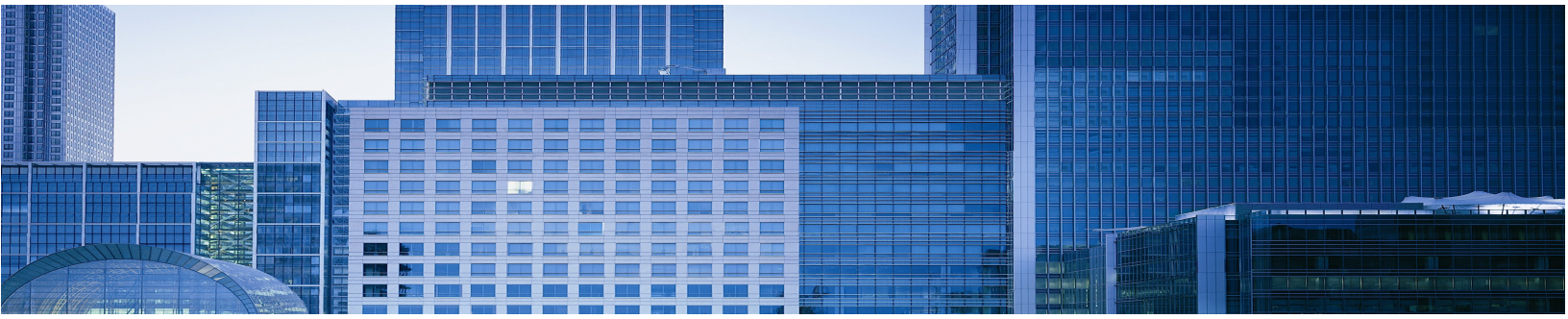
ESTATE MASTER

PROPERTY SOFTWARE



# Estate Master Installation and Registraion Operations Manual

# Table of Contents


## Part I Licence Types 4

1 User/PC Licence (Workstations) 4
2 CAS Licence (Terminal Servers Only) 5

## Part II Installation Process 7

1 Installation 7

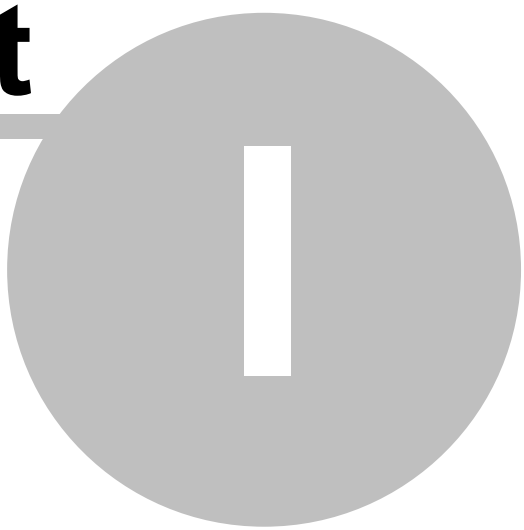
## Part III Registration, Payment and Activation 11

1 Step 1 - Introduction 11
2 Step 2 - Register or Activate 11
3 Step 3 - Product Information 12
4 Step 4 - User Profile Information 13
5 Step 5 - Payment Options 14
6 Step 5a - Manual Registration (No Internet) 14
7 Step 6 - Evaluating the Software 15
8 Step 7 - Activating the Licence 16

## Part IV Technical Support 18


© 2007 Estate Master Pty Ltd

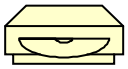
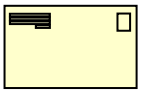
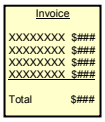
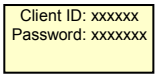
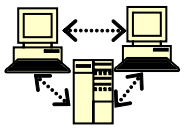
# Part



# 1 Licence Types

## 1.1 User/PC Licence (Workstations)

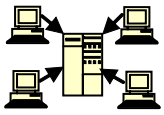
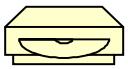
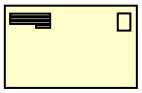
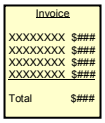
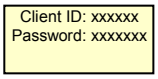
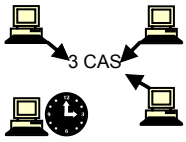
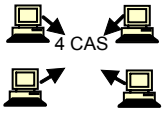
A **'User/PC License'** allows a single person to install, register and operate Estate Master on a single computer only. If more than one computer requires Estate Master to be installed and registered on it, whether for the same person (who holds a user licence on another computer) or for a different person, this constitutes an 'Additional User/PC Licence' and an additional fee is payable. For example, if a single person requires Estate Master on their PC, and also on their portable laptop, this constitutes two (2) User/PC Licenses.

| WORKSTATION Installation and Registration Process | | |
|---|---|---|
| 1 | | User wants to use Estate Master on Computer A. |
| 2 |  | User downloads / installs Estate Master on Computer A and completes 'Registration Wizard'. |
| 3 |  | A registration form is automatically generated and sent to Estate Master with a copy emailed to the user. |
| 4 |  | Once the registration form is received, an invoice is sent to the user (if applicable). |
| 5 |  | On receipt of payment, the user will be informed of the Client ID and Password. This allows them to 'Activate' their licence via the Registration Wizard on that computer next time they try to operate the program. |
| 6 | | User wants to use Estate Master on Computer B.<br>User must complete steps 1 – 5 on Computer B. |
| 7 |  | Licensed users can now share Estate Master files over a network and store them on either a file server or the computer hard drive. |

© 2007 Estate Master Pty Ltd

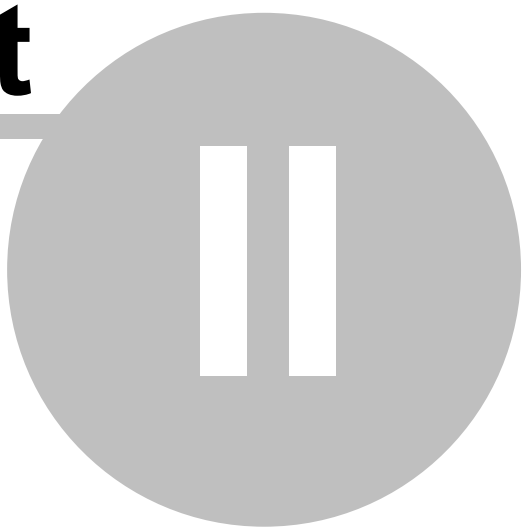
## 1.2 CAS Licence (Terminal Servers Only)

A **'CAS License'** (Concurrent Access Session) allows an administrator to install and register Estate Master on a single Terminal Server for concurrent access by multiple users. The number of CAS Licences determines the number of users that may operate Estate Master via the terminal server at any one time. For example, if a company has 3 CAS Licences and 3 users are currently operating the software, the 4th user will have to wait for another to close the software before they can open it. Additional CAS Licences can be acquired at any time to allow more concurrent users of the software.

| TERMINAL SERVER Installation and Registration Process | | |
|---|---|---|
| 1 |  | User wants to use Estate Master on computers connected via a Terminal Server. |
| 2 |  | User downloads / installs Estate Master on Terminal Server and completes 'Registration Wizard', nominating the number of CAS required. |
| 3 |  | A registration form is automatically generated and sent to Estate Master with a copy emailed to the user. |
| 4 |  | Once the registration form is received, an invoice is sent to the user (if applicable). |
| 5 |  | On receipt of payment, the user will be informed of the Client ID and Password. This allows them to 'Activate' their licence via the Registration Wizard on that terminal server next time they try to operate the program. |
| 6 |  | Any computer connected to the Terminal Server can operate Estate Master. Once the CAS limit is reached, the next user must wait for another user to exit Estate Master before they can open it. |
| 7 |  | If additional CAS is required, the user may 'Re-Register'.<br>After payment of an additional fee, the user may re-activate the software to update their CAS licensing on that terminal server. |

© 2007 Estate Master Pty Ltd

# Part



# 2 Installation Process

## 2.1 Installation

The Estate Master program can only be installed and registered by a person who has Administration rights for that PC/Server. The administrator must install and complete the registration of the software on behalf of the user.

**The following installation and registration process must be completed on each Workstation or Terminal Server that you intend to use Estate Master on.**

**You can not complete the registration process on one computer on behalf of another.**

### Install Prerequisite Software

To streamline the installation process, please make sure the following prerequisite software is installed on the PC/Server before attempting to install Estate Master:

- Microsoft .Net Framework 2.0 (DF, DM and CC)
- Microsoft Report Viewer 2005 (CC only)
- Microsoft SQL Server 2005 or SQL Express (Enterprise Database Only only)

The prerequisite software may be installed from the Estate Master CD or via the links supplied on the Estate Master web site.

### Install the Software from CD

1. Place the Estate Master CD into the drive and wait for the installation program to automatically load.
2. If you have not already done so, the setup process may prompt you to install the prerequisite software which is available on the CD.:
3. Follow the prompts to install the Estate Master program on the PC/Terminal Server.

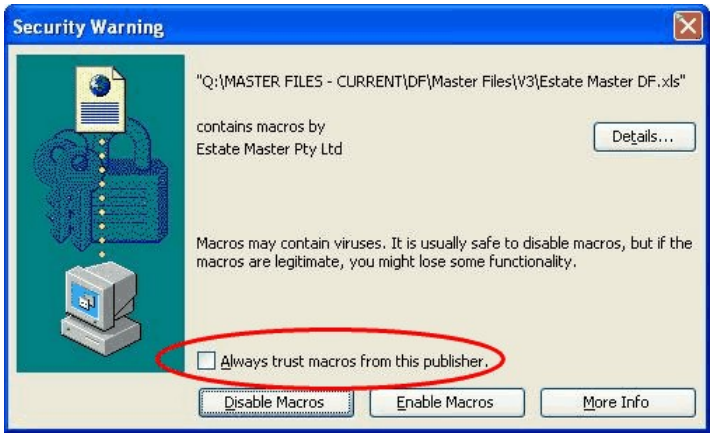
### Install the Software from Download

1. After downloading the Setup file from the Estate Master web site and saving it on your PC, open the file by double clicking on it with your mouse.
2. If you have not already done so, the setup process may prompt you to install the prerequisite software via the links supplied on the Estate Master web site.
3. Follow the prompts to install the program on the PC/Terminal Server.

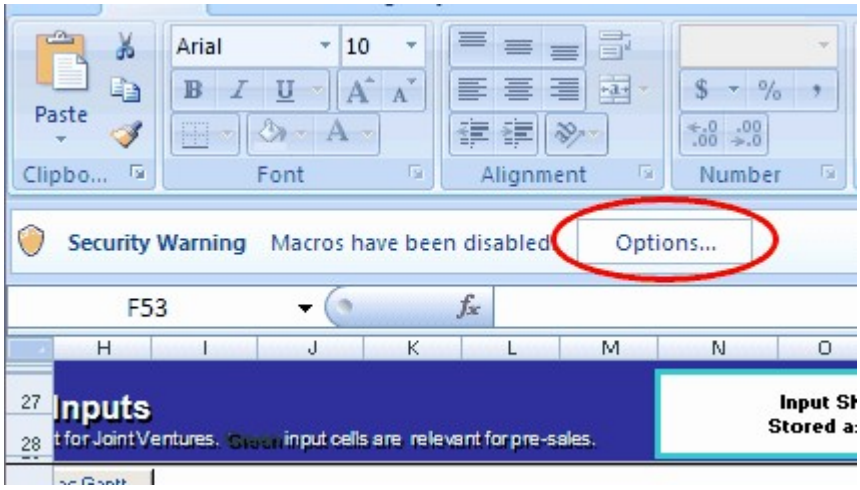
© 2007 Estate Master Pty Ltd

## Opening Estate Master

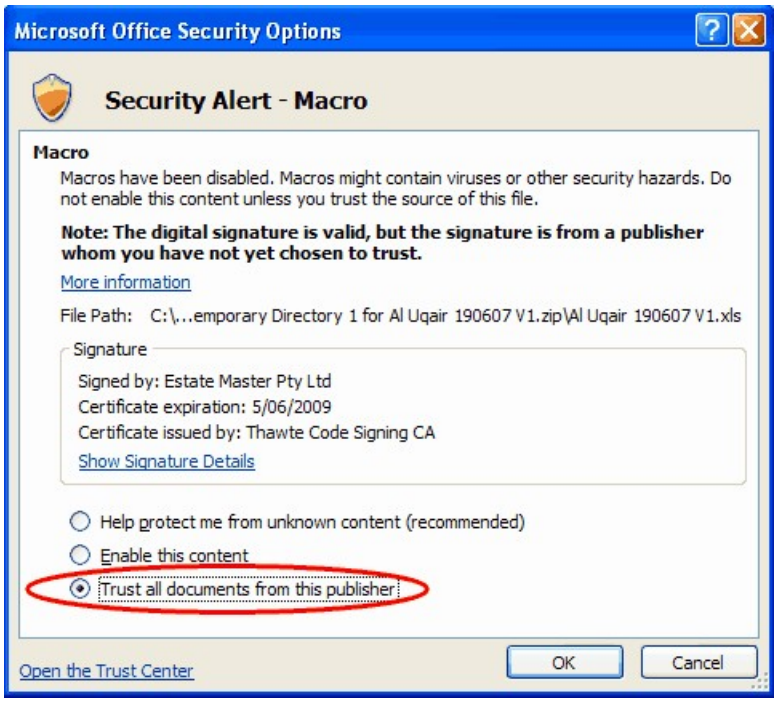
1. The default setup procedure (unless modified during the installation process by the user) will install Estate Master on the Microsoft Windows ‘Programs’ menu.
2. Go to the 'Start' menu of Microsoft Windows and browse through 'Programs'.
3. Find the 'Estate Master' folder and go to the relevant program (DF, DM or CC) and click on the Estate Master program link .
4. For Estate Master DF, DM or CC (Excel versions):
   - The program will begin to load using your version of Microsoft Excel.
     - If using Excel 2000 - 2003: Tick the box ‘Always Trust Macros from this source’ and ensure that macros have been 'Enabled' (see below).




     - If using Excel 2007: Click on 'Options' when the Security Warning states that 'macros have been disabled' and then in the 'Security Alert' window, select 'Trust all documents from this Publisher' and click 'OK'.




© 2007 Estate Master Pty Ltd

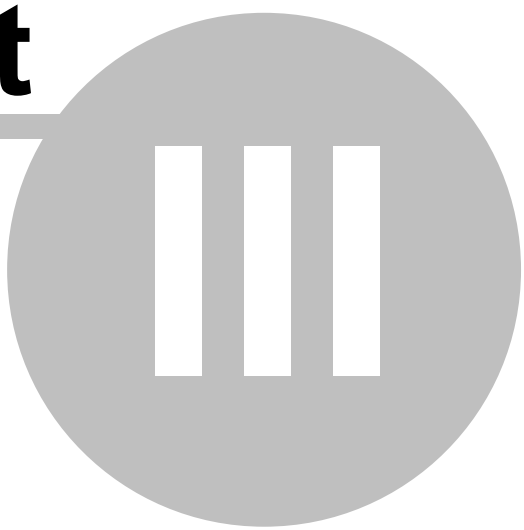



- If this message (or one similar) doesn't appear, you will have to set your Macro Security settings to 'Medium':
  - If using Excel 2000 - 2003: via Tools - Macro - Security (Alt T M S).
  - If using Excel 2007: via the Trust Center (Microsoft Office Button , Excel Options button , Trust Center category, Trust Center Settings button, Macro Settings category. Or Developer tab, Code group, Macro Security button)

5. For Estate Master CC (Database version):
   - The program will begin to load in Windows.
   - For more detailed instructions on using the Estate Master CC Program, refer to its Operations Manual.

© 2007 Estate Master Pty Ltd

# Part



# 3 Registration, Payment and Activation

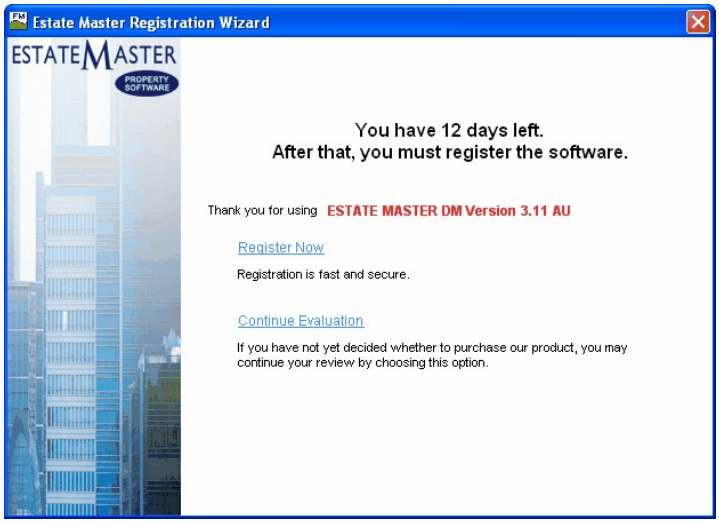
## 3.1 Step 1 - Introduction

**Please Note: Estate Master uses an online activation process.
An internet connection on the PC/Server is required to
register and activate an Estate Master licence.**

When opening Estate Master for the first time, the Estate Master Registration Wizard will appear. It will display the version of Estate Master that has been installed and the expiry of the evaluation period. After that, the user will have to register the program and pay the appropriate licence fee to be able to operate it.

There is the option to **'Register Now'** or 'Continue Evaluation.

- If the latter is clicked, then the will operate in 'Unlicensed' mode (fully functional).
- If 'Register Now' is clicked, it will proceed to Step 2.




## 3.2 Step 2 - Register or Activate

The next screen will prompt the user to either Register or Activate a licence.

**Please Note: Estate Master uses an online activation process.
An internet connection on the PC/Server is required to
register and activate an Estate Master licence.**

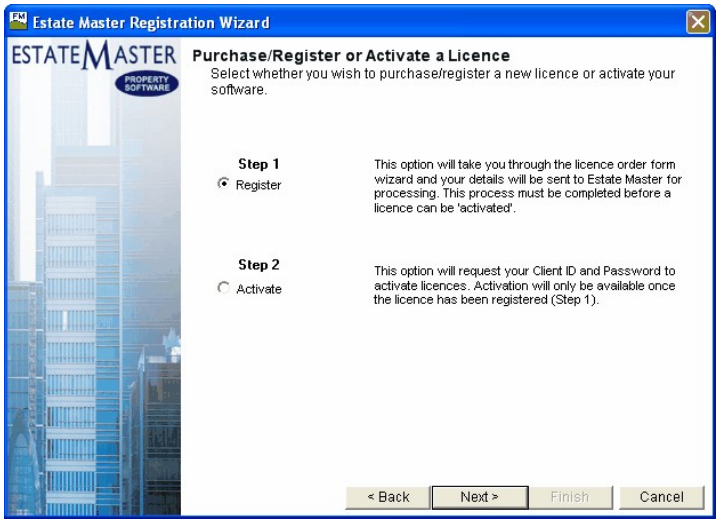
**Step 1 – Register**: This will take the user through the licence order form wizard and send the details automatically to Estate Master for processing. This option should be selected if:

- A user has not previously purchased the Estate Master licence for that specific PC/Server.
- A user has not previously registered the licence on that specific PC/Server.

**Step 2 – Activate**: This is the final step in activating licences on that specific PC/Server that have already been purchased and registered. This option should be selected if:

© 2007 Estate Master Pty Ltd

- A user has already completed the 'Purchase' process in the wizard and submitted the registration form to Estate Master.
- Estate Master has emailed the user their Client ID and Password (if not already known) to inform them that their licence is ready to be activated.




## 3.3 Step 3 - Product Information

The next screen allows the user to select the product they wish to register.

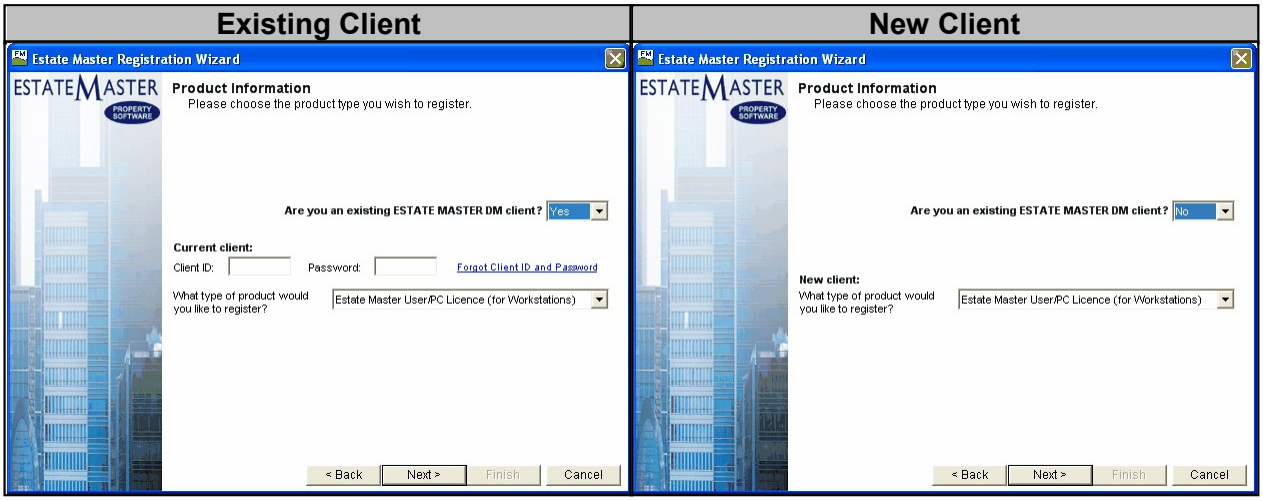
| Estate Master for Workstations (User/PC Licence) | Estate Master for Terminal Servers (CAS Licence) |
|---|---|
| Suitable for users who install and operate their software via a Standalone Workstation.<br><br>The Estate Master software must be installed and registered on individual workstations, while the project files the user creates can be either stored locally or on a file server for network access. | Suitable for users who install and operate their software via a Terminal Server (i.e., Windows 2003 Server, Citrix Server).<br><br>The Estate Master software can not be installed and operated via standard file server for network access. |

### Are you an existing client?

A user **is not an existing client** when their Company that has not already purchased an Estate Master Product and therefore does not have an existing Client ID and Password.

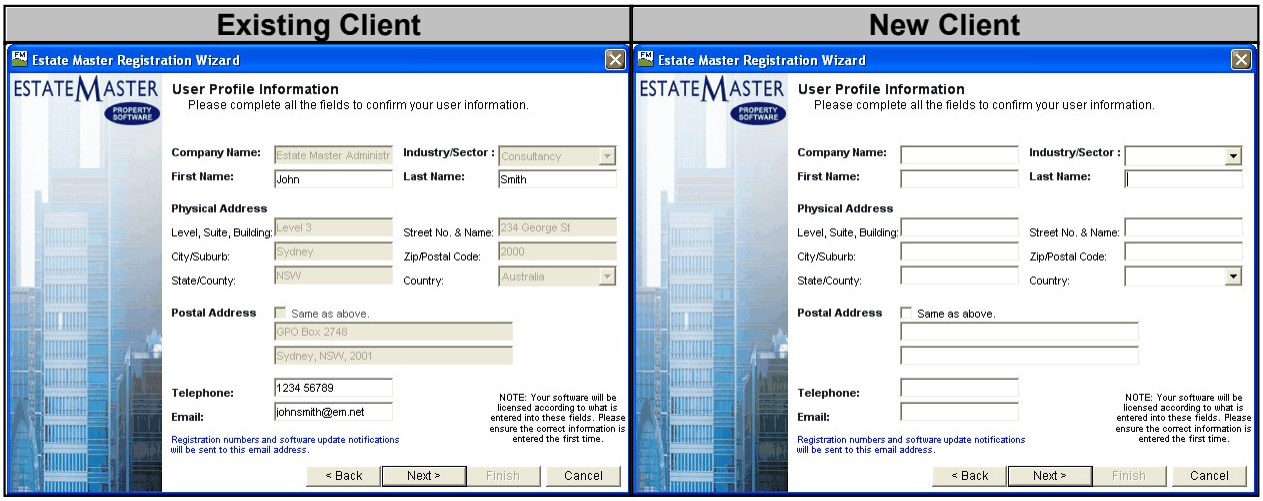
A user **is an existing client** when their Company that has already purchased an Estate Master Product and therefore do have an existing Client ID and Password.

© 2007 Estate Master Pty Ltd

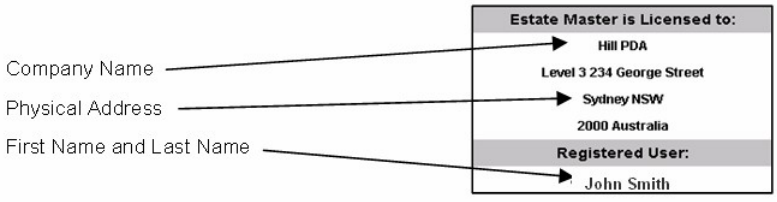



## 3.4 Step 4 - User Profile Information

The next screen prompts the user to enter their information. The Estate Master software will be licensed according to the designated user and company, as entered in these fields. (See Estate Master Intro Screen).




The details that will be shown on the Estate Master program when it is registered are:




If the software is being installed and registered on a Terminal Server, then the user's name will be replaced with 'Terminal Server x CAS' (x signifying the number of Concurrent Access Sessions) in the 'Registered User' field.

© 2007 Estate Master Pty Ltd

## 3.5 Step 5 - Payment Options

The next screen allows the user to enter in their preferred payments method.

If **'No Payment Required'** is chosen, it is assumed that the user has previously paid for the software. This will be verified by Estate Master on recept of the registration form.

If **'Cheque' or 'Direct Credit/EFT (Electronic Funds Transfer)'** is chosen, the user can click on the 'Check Web for Payment Details' button to view the relevant banking information.

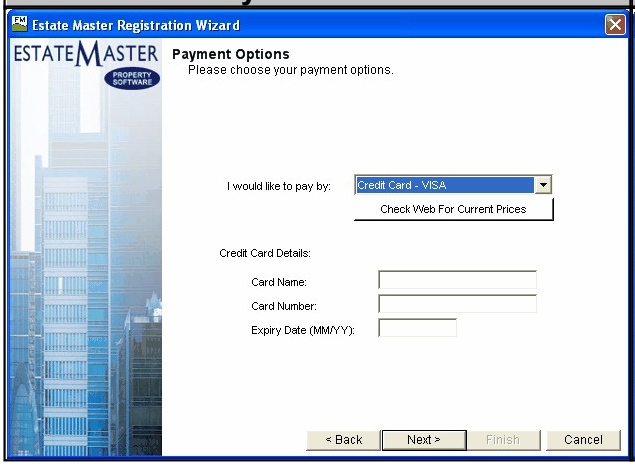
If **'Credit Card'** is chosen, the user will have to enter all their credit card information. A credit card surcharge may be applicable.

**Users will not be able to 'Activate' their software until receipt of licence fee payment**

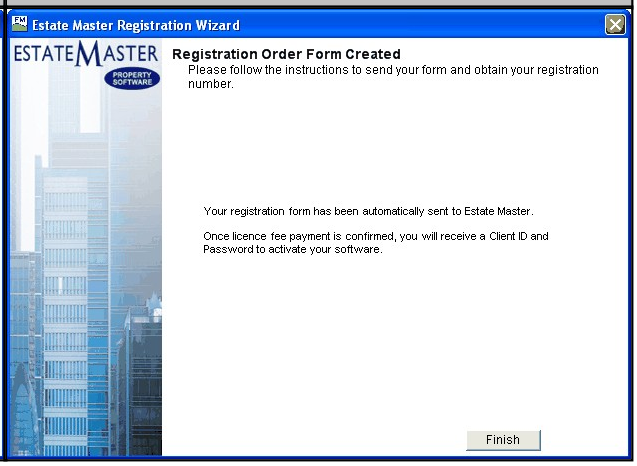
Once all payment information has been selected, click on 'Submit', and the Estate Master Order Form will be automatically sent to Estate Master for processing.

If you are not connected to the internet at this stage, see Step 5a, otherwise proceed to Step 6

**Payment Details**




**Automatic Submission**

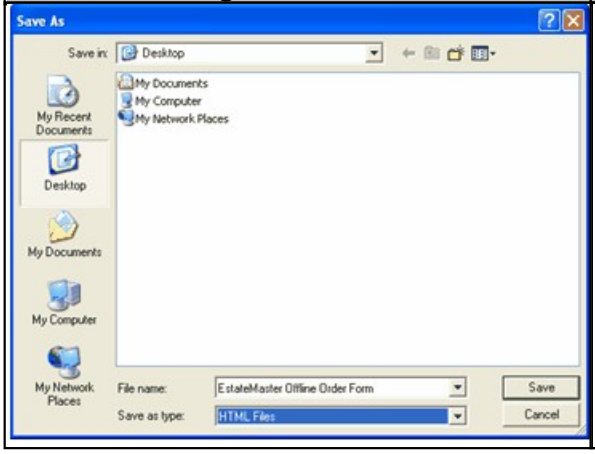
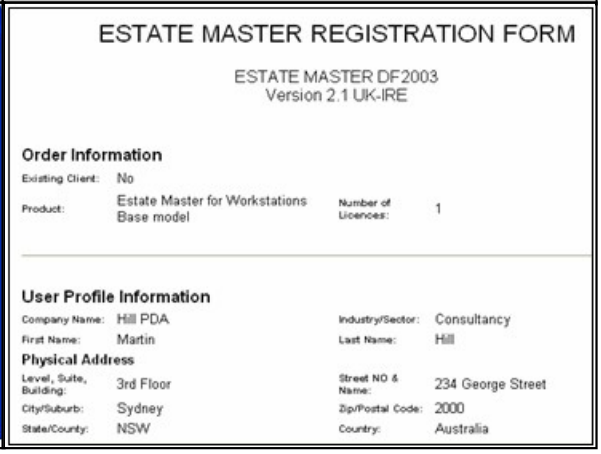



By clicking on 'Finish', the registration process will end, and the Estate Master will open in Excel. If the evaluation period has expired, Estate Master will not open at all until activated.

## 3.6 Step 5a - Manual Registration (No Internet)

If submitting your registration does not automatically send it to Estate Master over the internet, then a 'Save As' dialog box will appear, requesting the user to save the Estate Master Order Form HTML file. The file must be saved to proceed with the registration.

© 2007 Estate Master Pty Ltd

| Saving the Order Form | An extract of the Order Form |
|---|---|
|  |  |





Once the order form has been saved the next screen in the registration process will appear, allowing the user to view the order form and send it for the registration and payment to be confirmed.

**DO NOT modify the contents of the HTML registration form in any way.**
**If you have made an error, close and reopen the software, and redo the registration form.**
**Contact Estate Master if you need assistance.**

The user must send the registration form by one of the following options:

1. **FAX or POST**: The user must print the form out and fax or post it to the number or address provided at the bottom of the form.
2. **EMAIL**: The user must manually attach the order form to an email and send it to the specified address.

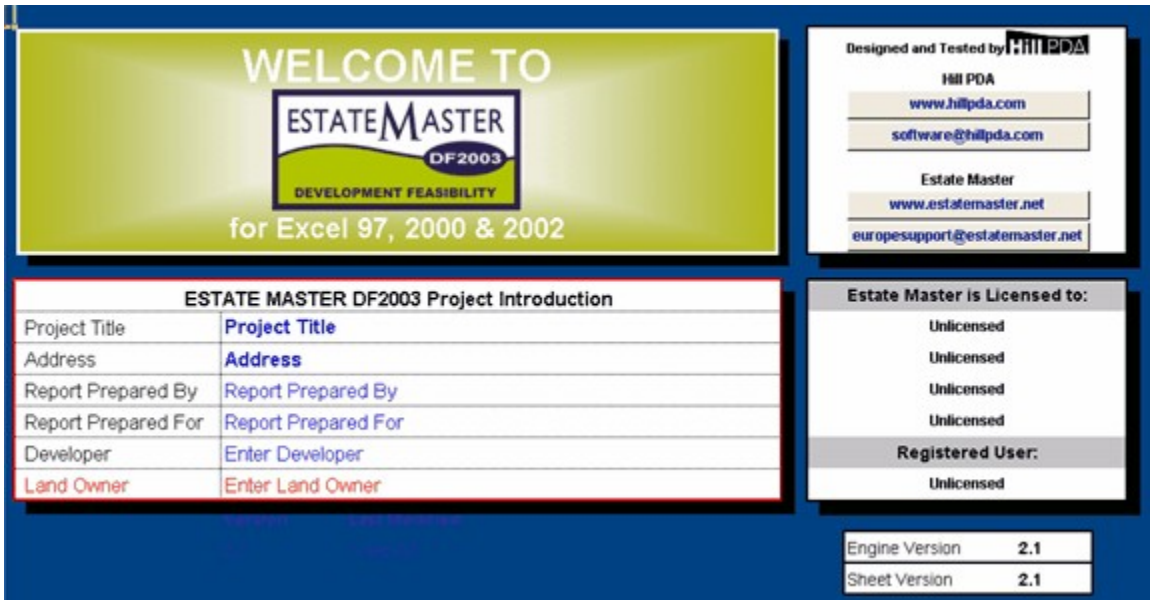
By clicking on 'Finish', the registration process will end, and the Estate Master will open in Excel. If the evaluation period has expired, Estate Master will not open at all until activated.

## 3.7 Step 6 - Evaluating the Software

After the Estate Master Registration Wizard has exited and returned to the Estate Master program, the 'Intro' screen will appear. Take note the license details on the bottom right - until registration payment has been confirmed and the user has activated their licence, these details will show 'Unlicensed'.

Even though, the software is 'Unlicensed', it will have full functionality for the duration of the evaluation period.

© 2007 Estate Master Pty Ltd



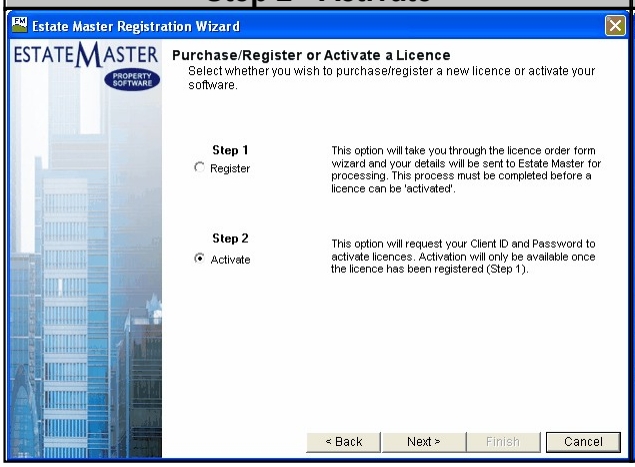
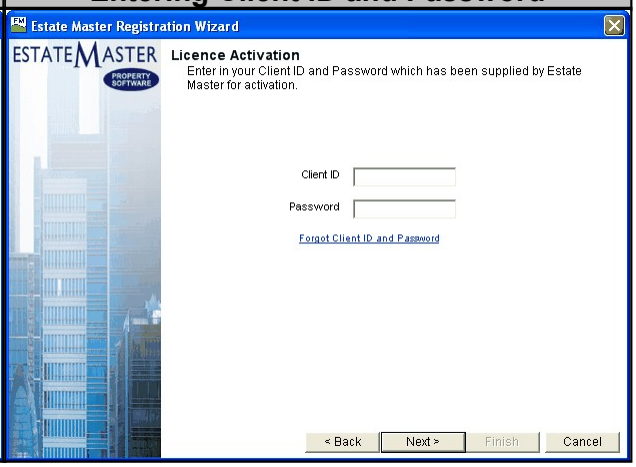

## 3.8 Step 7 - Activating the Licence

**Please Note: Estate Master uses an online activation process.
An internet connection on the PC/Server is required to
register and activate an Estate Master licence.**

This is the final step in activating licences on that specific PC/Server that have already been purchased and registered.

After completing the 'Step 1 - Register' process in the wizard and submitting the registration form to Estate Master, the user will be emailed their Client ID and Password (if not already known) to inform them that their licence is ready to be activated.

Upon opening Estate Master, the user selects ‘Register Now’ and then ‘Activate’ in the second screen. Input fields will appear requesting the user to enter their Client ID and Password.

| Step 2 - Activate | Entering Client ID and Password |
|---|---|
|  |  |



After activating the software the details on the Estate Master 'Intro' screen can update from ‘Unlicensed’ to reflect the details entered in the User Profile.

© 2007 Estate Master Pty Ltd

# Part

# 4 Technical Support

For further assistance in installing and registering Estate Master, please contact an Estate Master consultant.

| Australia | Republic of Ireland | United Kingdom |
|---|---|---|
| Estate Master Pty Ltd<br>GPO Box 2748<br>Sydney NSW 2001 Australia<br>Tel: 61 2 8198 7600<br>Fax: 61 2 9241 6854<br>support@estatemaster.net | Building Software Services<br>4 Milton Terrace, Seapoint Road<br>Bray, Co. Wicklow, Ireland<br>Tel: 353 1 282 8632<br>Fax: 353 1 282 8634<br>europesupport@estatemaster.net | Building Software Services<br>Suite 111N, 52 Upper Street<br>Islington London N1 0QH<br>Tel: 020 72886494<br>Fax: 020 72886495<br>europesupport@estatemaster.net |

*© 2007 Estate Master Pty Ltd*