



Ezi Accounting

Installation and Upgrading



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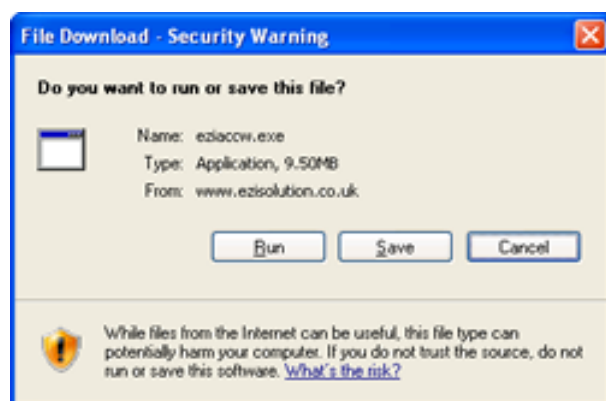
This document describes how to do a first install and how to upgrade Ezi Accounting software. An Ezi Accounting system can only be as fast and reliable as the computer running the program. Ensure there is plenty of space for the data and there is a method of performing regular backups.

On a multi-user system, one PC acts as a server. This has all the data and programs. Please see the Multi User Setup Guide for more information.

1. Download the Latest Software

It is best to download the latest version of Ezi Accounting before you start the process. The URL for the download is below. You may download Ezi Accounting from other web sites, but these may not have the latest version.

<http://www.ezisolution.co.uk/Downloads/eziaccw.exe>



If there are problems like a hardware failure, the download may be required to re-install the software, so it is best to do a Save and not a Run, then save the file in a safe folder. To be safe, copy the download onto a different computer or write to CD-ROM.

2. Backup Existing Ezi Accounting Files + Prepare for Upgrade

Before upgrading, always shutdown Ezi Accounting, then use a program like WinZip to create a backup of all files in the folder contains the software. See section 7 for more details.

In a multi-user system, exit from Ezi Accounting on all POS stations that use the server.

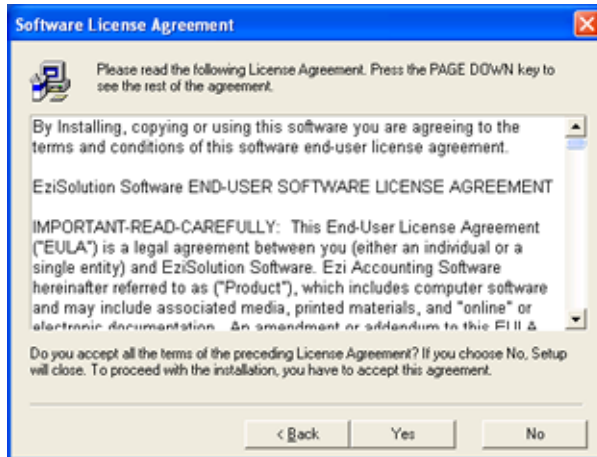
First time installation - Create the folder (e.g. C:\Ezia or C:\Apps\Ezia) using Windows Explorer.

Upgrade installation - Note the folder where Ezi Accounting is installed. You need to know the version of your current software (see **Help, About**) and the version of the download. Minor upgrades like version 1.80.2 to version 1.80.6 are free and no new licence key is required. A new licence key will need to be purchased before a major upgrade, like version 1.70 to version 1.80. **You need to have your new licence key before you start a major upgrade.** If you are not sure, please contact ezi@ccounting.com to confirm.

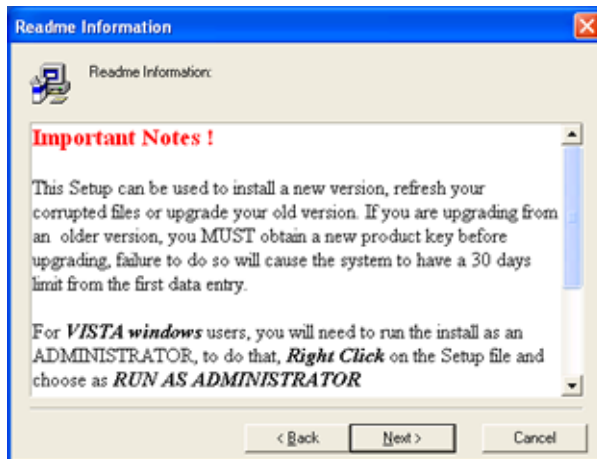
3. Starting the Installation / Upgrade

Double-click on the download to start the installation of Ezi Accounting.

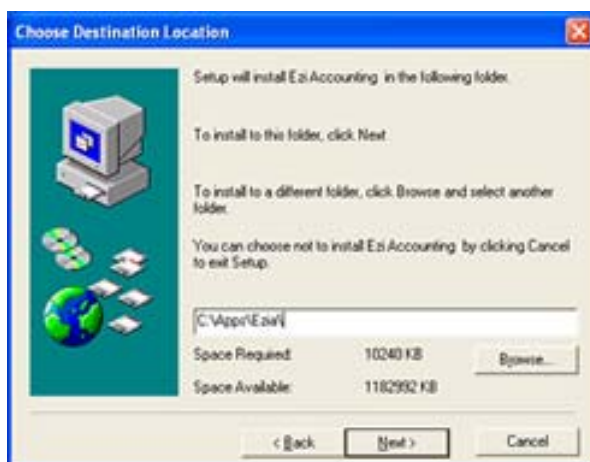
On Windows Vista, right click, **Run As Administrator**



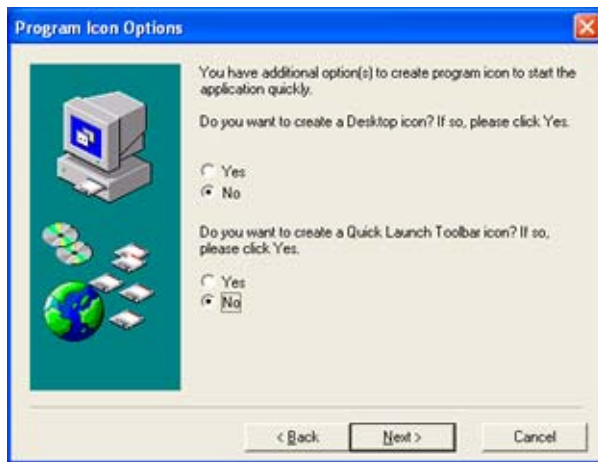
Please read the terms of the license agreement before installing Ezi Accounting. You accept the terms of the license by continuing with the installation.



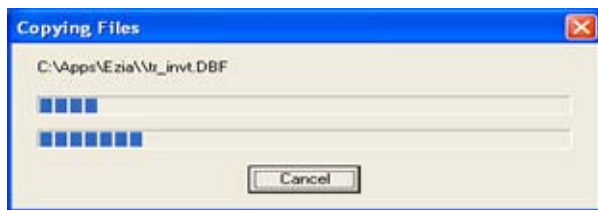
The Readme Information has useful information, Especially for systems with Windows Vista.



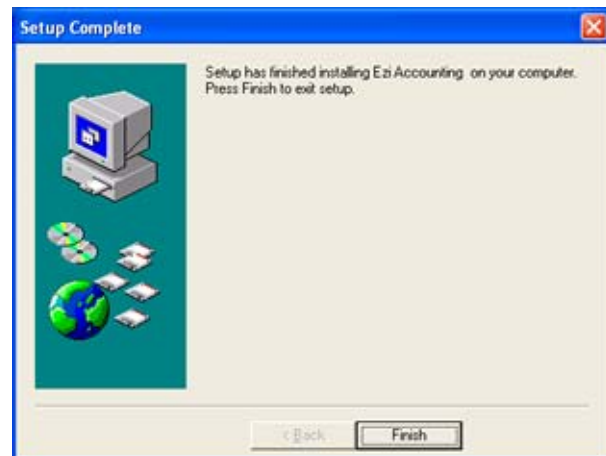
Specify the folder where to install Ezi Accounting (e.g. C:\Ezia or C:\Apps\Ezia). The installation will fail if the folder does not exist.



If you expect to be using Ezi Accounting frequently, it is best to create a Desktop icon and Quick Launch Toolbar icon. The files will then be copied from download file.



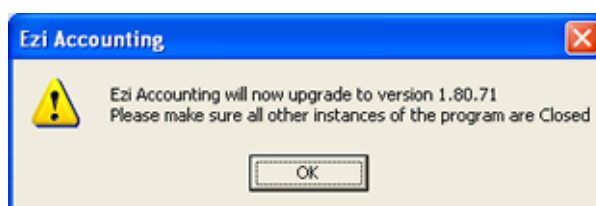
Depending on the speed of your system, the files will take a few minutes to install.



The installation has completed when the Setup Complete screen is displayed, but data files still need to be upgraded.

4. Running Ezi Accounting POS

Important – on Windows Vista, Ezi Accounting must be run as Administrator, so the properties of the Ezi Accounting application must be changed. Run Windows Explorer then right click on the Ezi.exe file.



The first time that Ezi Accounting is run, the data files are upgraded.

For a new install, the process will take a few seconds.

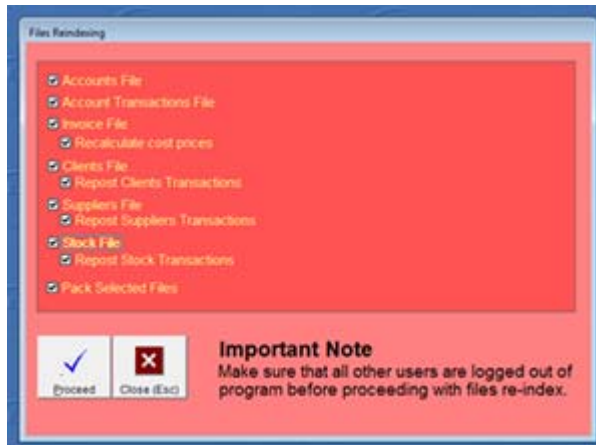


The welcome screen will be displayed after the data files have been upgraded.

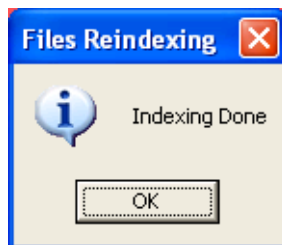
You may evaluate the software for 30 days worth of transactions before a licence key has to be purchased. Please do not leave it too late before you buy a licence key!

After a major upgrade the new licence key needs to be entered here before the software can be used.

5. Re-indexing of Data Files

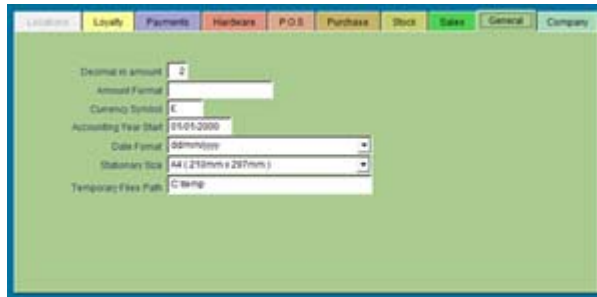


After an upgrade a full re-index of data is recommended to ensure consistency of data. See **Maintenance, Files Reindexing**



If any errors are reported by the re-indexing of files, these must be investigated before the system is used.

6. Initial Setup for New Installations of Ezi Accounting POS

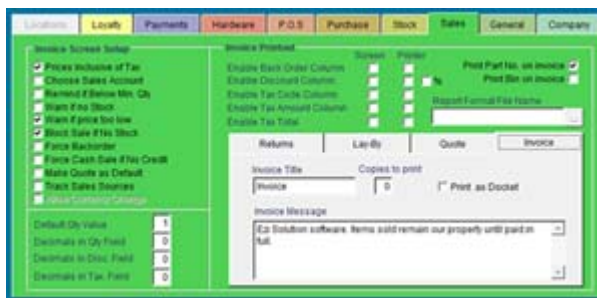


The **Currency Symbol** and the **Stationary Size** on the **Maintenance, System Setup, General** screen.

Ensure that the Temporary Files Path exists (**C:\temp** by default).



The **Business Name, Address** and **Business Logo** can be set on the **Maintenance, System Setup, Company** screen.



The **Invoice Message** and **Quote Message** should be set on the **Maintenance, System Setup, Sales** screen.



The Tax Name Tax 1 (Local Sales Tax or VAT) should be set on the **Maintenance, Tax File Maintenance** screen. Also, the rates for Tax, Input Tax, Non Registered, Tax Exempt and Export Tax. Tax Name Tax 2 only should be set were there are two different rates of taxes.

Code	Name	Type	Post To	Group	Level	Unit
1000	CURRENT ASSETS	F		1	1	
1001	Cash Overrun	A		1	1	
1002	Bank Account	A		1	1	
1003	Profit/Carry	A		1	1	
1100	Trade Debtors	A		1	1	
1101	Less Provision for Doubtful Debts	A		1	1	
1200	Stock on Hand	A		1	1	
1300	Prepayments	A		1	1	
1301	Deposits Paid	A		1	1	
1302	Voluntary Withholding Credits	A		1	1	
2000	NON-CURRENT ASSETS	F		2	1	
2001	Fixed & Freehold - at Cost	A		2	1	
2002	Plant & Equip - Accum Depn	A		2	1	
2003	Fixtures & Fittings - at Cost	A		2	1	

Review the Accounts, Chart of Accounts to see if any new accounts need to be created for sales or purchases.

6. Support for Hardware and Software

An accounting and invoicing system is a key component for a business. Ensure that the hardware used is reliable. Find a local supplier that can support your computers. Your invoices will be delayed if your accounting system stops working. It is recommended to create hard copies of the key reports at the end of each month and financial period.

Silver or Gold Support is recommended on all Ezi Accounting systems. Silver Support gives faster response to support E-Mails. Gold Support allows direct access to Ezi Solution support by Windows Messenger or Skype.

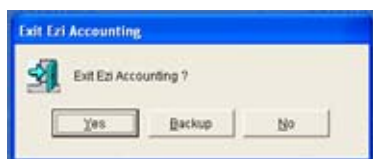
Ezi Forum has a lot of useful information about the setup of Ezi Accounting. You need to register as a user on Ezi Forum if you wish to post a question or respond.

http://www.ezision.co.uk/support_options.htm

<http://www.eziforum.com>

7. Backups of Ezi Accounting POS

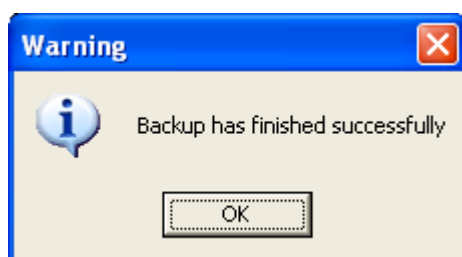
There is the option to backup data files when exiting from the program.



Always backup the data after making significant changes or at the end of the working day.



Specify a folder for the backup that is away from the folder where the software is installed



The backup may take several seconds for systems with larger databases.

A regular full backup is recommended of all Ezi Accounting files. On busy systems a daily backup is recommended. Ezi Accounting must be fully shutdown to get a clean backup.

1. A DAT drive can be used with software similar to Tapeware for a simple and secure backup solution.
2. A package like WinZip can be used to create a saveset of selected folders. The saveset can then be written to a CD-Writer or USB memory stick.
3. On-line storage sites like Mozy enable data to be stored remotely with the minimum of effort.

At least one DAT tape or CD should be stored off-site and away from the computer systems, or use a facility like Mozy.

<http://www.tapeware.com> Backup solutions for servers

<http://www.winzip.com> WinZip file compression utility

<http://www.mozy.com> Online backup of data