1099/W-2/1042-S/8966/CRS Pro Installation Instructions

THIS SOFTWARE MAY BE INSTALLED AS EITHER:

- A no obligation, fully functional DEMO that prints a limited number of sample forms.
- A fully installable, licensed version, after you obtain your Activation Code.

NOTE: If you have already purchased your software, you will find your Activation Code at the bottom of your paid invoice or packing slip.

This CD-ROM also includes the following:

- 1099 Pro 20XX Printable Help Manuals (PDF Format)* - also available within the software by pressing the <F1> key.
- Technical Support Documents (PDF Format)* – addressing various common user issues.
- 1099 Pro 20XX End User License Agreements (PDF Format)* – also displayed during install.

*Adobe Acrobat Reader is also included on this CD and is required to view all documents in PDF Format.

SINGLE USER INSTALL

FOLLOW THE STEP-BY-STEP INSTRUCTIONS BELOW:

1. Close all programs. **We also recommend disabling any virus checkers during the install.**
2. Insert the installation CD-ROM into your CD-ROM drive. (If the menu does not appear, click on the Start button and choose Run and type D: \Setup.exe). **Vista and Windows** 7 & 8 users: If presented with an AUTORUN question, choose "Run Setup.exe". If User Account Control informs you that the Setup program wants to access your computer, choose "Continue" to proceed with the installation.
3. The Installation Wizard will prompt you through the install routine.
4. When prompted, enter your Activation Code which begins with a letter. If you do not have an Activation Code, then type in the word **"DEMO."**
5. ROLL FORWARD OPTION: You will be prompted to copy your Filer, Recipient, Security, Transmitter, and/or Import Map information from your 20XX software. Make the appropriate selections and click NEXT.
6. Once Install is complete and if you selected the Roll Forward Option in Step 5, your Tax Year 20XX Filers may be selected at the Select Filer Screen. Tax Year 20XX Recipients may be browsed when your cursor is in the TIN field of any blank form being entered onscreen. Simply press the <F2> Key or right click your mouse to view your Recipients.

MULTI USER INSTALL

For Multi-user installations, all 1099 Pro® software requires that one machine is designated as a Server and all others as Workstations. The Server may be any Windows® machine on the network or having a local or remote drive accessible by all computers that will function as Workstations

To perform the Server installation:

1. Determine the network computer, drive and folder in which to install your software. All Workstations must have full rights to this folder.
2. Install your software on the network computer to be designated as the Server. Enter your Multi-User Activation Code when prompted. Select **Server Installation** as the Install Type. Allow the program files to reside on the local or remote drive.
3. After successfully installing your software to the network, click on the 1099 / W-2 / 1042-S / 8966 / CRS Pro® icon on your desktop. The Getting Started Wizard will walk you through setting up the software. By default, Audit Trails are enabled and Security is disabled.*
4. After completing the Getting Started Wizard, re-launch your software. Administrators use "**Administrator** " for the User ID and the Password "**NEW** " to logon for the first time with Security enabled. The Administrator should create users and assign rights prior to installing 1099 / W-2 / 1042-S / 8966 Pro® on Workstations.

* You are encouraged to enable Security. If Security is disabled, ANY USER on ANY WORKSTATION can access your software and View/Modify Administrator settings and all data. This includes the potential for ANYONE to create himself as Administrator and lock you out of the software.
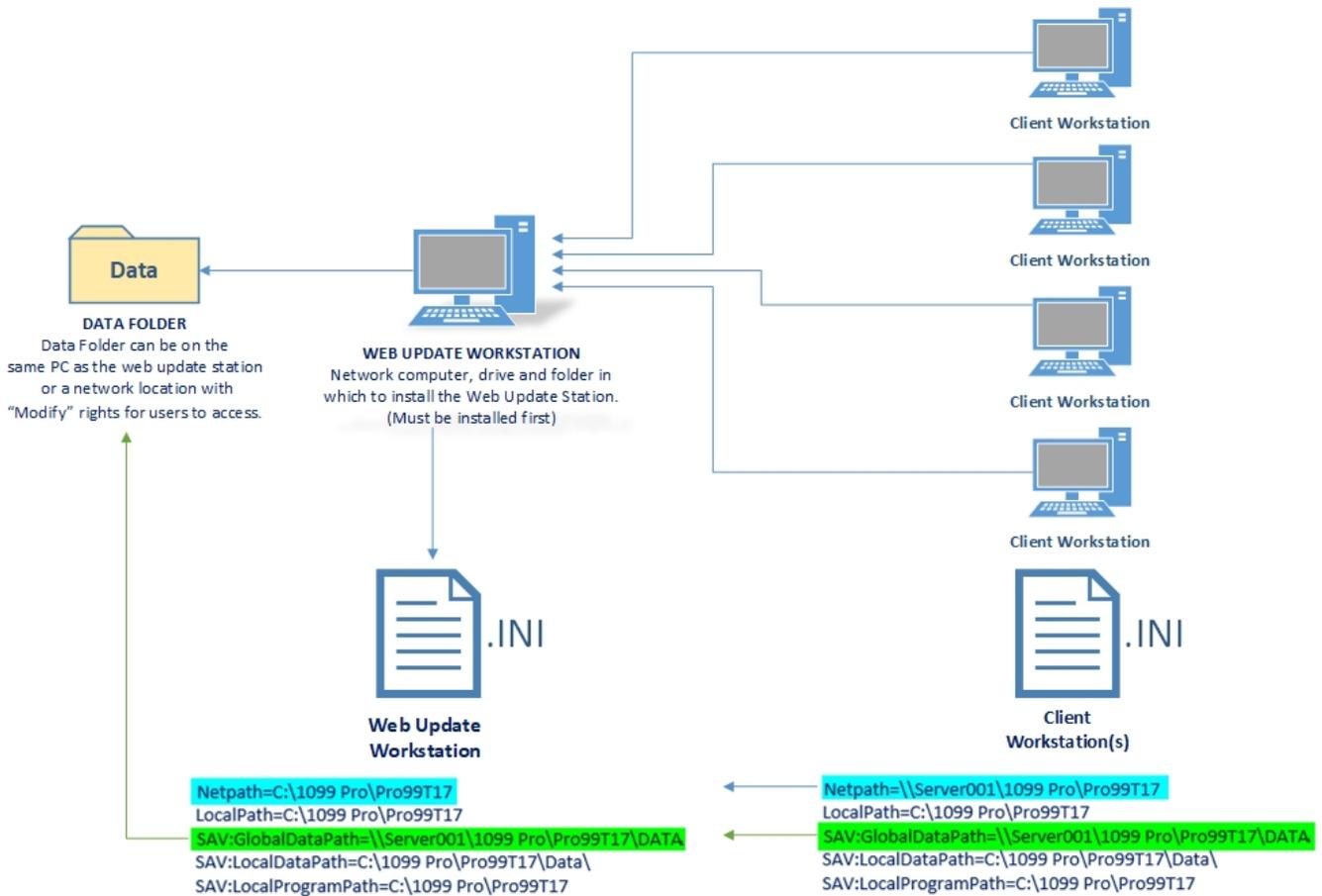
To perform the Workstation installation:

1. Be sure to open the server installation & set security On or Off before proceeding.
2. Complete Server installation prior to installing Workstation(s).
3. Locate the Server installation drive and folder from the Workstation. To map the Server installation's network drive from a Workstation, open Windows Explorer from each Workstation. Locate the network drive, right click your mouse and select Map Network Drive. Each installation will refer to this drive as the Global Data Path.
4. Install your software on the Workstation. Enter your Multi-User Activation Code when prompted. Select **Workstation Installation** as the Install Type. Browse for the network drive and folder of the Server installation (e.g., X:\1099 Pro\Pro99TXX\ where "X" is the mapped Network Drive). Allow the program files to reside on the local drive (e.g., C:\1099 Pro\Pro99TXX).
5. If the Administrator enabled Security, then the Workstation is deemed a "user." Upon first entering your software at the Workstation, a User ID (as assigned by the Administrator) is required. For the Password enter "**NEW** ". The User is then required to create a unique password.
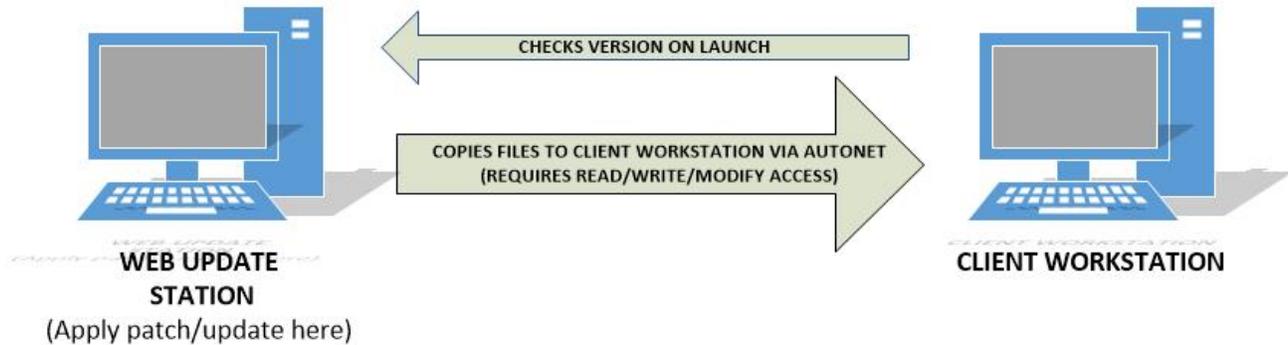
External Networking ports used by 1099 Pro:

Service Bureau Uploads	Software Updates	News\Help Updates

- SB Built-In (HTTPS)
  - DNS = sb.1099pro.com
  - IP = 67.52.97.132
  - Port = 443

- SB Built-In (FTP)
  - DNS = ftp.1099pro.com
  - DNS = uploads.1099pro.com
  - IP = 67.52.97.136
  - Port = 21

- SB Manual Transfer
  - URL = https://uploads.1099pro.com
  - IP = 67.52.97.136
  - Port = 443

- Update Server 1 (Check for updates from within the software.)
  - DNS = updates.1099pro.com
  - IP = 67.52.97.132
  - Port = 80

- Update Server 2 (Check for updates from the start menu and update download.)
  - DNS = s3.amazonaws.com
  - IP = Various
  - Port = 80

- Update Server 3 (Manual update download)
  - URL = https://wiki.1099pro.com
  - URL = https://host.1099pro.com/ftp
  - IP = 67.52.97.132
  - Port = 443

- Central Updates
  - DNS = central.1099pro.com
  - IP = Various
  - Port = 443

DATA FOLDER
Data Folder can be on the same PC as the web update station or a network location with "Modify" rights for users to access.

WEB UPDATE WORKSTATION
Network computer, drive and folder in which to install the Web Update Station.
(Must be installed first)

Client Workstation

Client Workstation

Client Workstation

Client Workstation

Web Update Workstation

Netpath=C:\1099 Pro\Pro99T17
LocalPath=C:\1099 Pro\Pro99T17
SAV:GlobalDataPath=\\Server001\1099 Pro\Pro99T17\DATA
SAV:LocalDataPath=C:\1099 Pro\Pro99T17\Data\
SAV:LocalProgramPath=C:\1099 Pro\Pro99T17

Client Workstation(s)

Netpath=\\Server001\1099 Pro\Pro99T17
LocalPath=C:\1099 Pro\Pro99T17
SAV:GlobalDataPath=\\Server001\1099 Pro\Pro99T17\DATA
SAV:LocalDataPath=C:\1099 Pro\Pro99T17\Data\
SAV:LocalProgramPath=C:\1099 Pro\Pro99T17

Multi-User Patch/Updates

CHECKS VERSION ON LAUNCH

COPIES FILES TO CLIENT WORKSTATION VIA AUTONET
(REQUIRES READ/WRITE/MODIFY ACCESS)

WEB UPDATE STATION
(Apply patch/update here)

CLIENT WORKSTATION

1. Apply patch/updates to webupdate station (server)
   a. Patch/Updates can be ran in Help on top menu > check for updates to 1099 Pro
   b. Firewalls can block connection. Manual downloads can be found at wiki.1099pro.com

2. Client workstations will update on launch if a new version of the webupdate station is found.
   a. Users/Station requires access (Read/Write/Modify) to Server files.

A PDF copy of this document can be downloaded here: Installation Instructions