



Installation and Startup

Prerequisites for Installation

- Screen resolution of at least 1024 x 768
- A broadband internet connection
- Microsoft Windows XP or later operating system
- A full or runtime edition of Access 2007, or later
- Approximately 50Mb disc space if Access is installed; up to 300Mb if not.

If you have not yet downloaded the install suite

- [Click here](#) for TBF CRM Basic (freeware) supporting up to 100 customers or
- [Click here](#) for TBF CRM Lite (\$12) and support for up to 1,000 customers or
- [Click here](#) for TBF CRM Pro (\$24) with an unlimited number of customers or
- [Click here](#) for TBF GRM (£24)
- follow the instructions to download the file; the default location for the downloaded file is the desktop (if you do not want to use the default location and are not familiar with how to select a different location, [click here](#)).

When you have downloaded the install suite

Starting the installation

- Make sure you are connected to the internet, then double click to open the install suite;
 - if an 'OPEN FILE – Security Warning' message box appears:
 - check that the 'Name' listed is: TBFCRMBasic.exe, TBFCRMLite.exe, TBFCRMPro.exe, or TBFGRM.exe
 - check that the 'From' lists the path of the location at which you saved the file
 - if these are correct, click the 'Run' button to proceed with the installation; if these are not correct, locate the correct file or desktop icon;
- the installation configuration will start and pause at the 'TBF Setup Wizard - Welcome' dialog box
- an 'Installer Information' message may appear advising the minimum screen resolution you need to have;
 - if you know your screen resolution is the minimum or greater, click 'OK' to close the dialog box to return to the TBF Setup window and proceed with the installation;
 - if you don't know your screen resolution, or know that it is less than the one stated, you should check and adjust it or abort the installation (if you are not familiar with how to check and adjust your screen resolution [click here](#));
- click 'Next' to continue the installation; this will bring up the End-User License Agreement; to proceed you must accept the terms by clicking the 'I accept . . .' radio button;
- when you have clicked to accept, you will be offered the option to define where to install the application. Click 'Next' to continue;
- now choose which short cut options you require. Click 'Next' to continue;
- the dialog box will next notify you that the program is ready to install; click the 'Install' button to proceed with software installation.

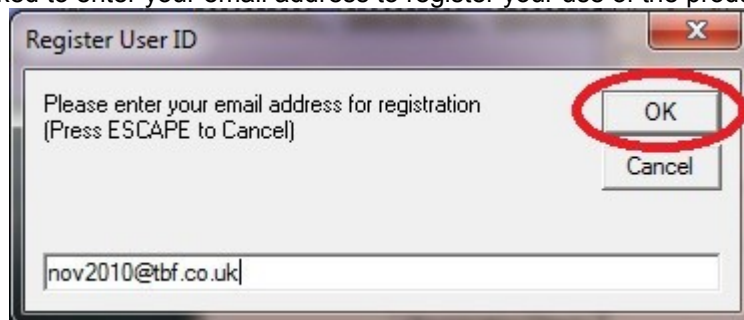
Installation progress

- The TBF Set Up Wizard will proceed with the setup;
- When the TBF Set Up Wizard has completed the installation, it will show a 'Finish' button highlighted to prompt you to close the dialog. Click on this to close the dialog box.
- The TBF application will then be ready for first use; double-click on the icon that has been placed on your desktop.



Application Startup

- The very first time the application is started, it will first check to see if you already have a suitable version of Access:
 - if you do, it will proceed to link to a database of your choice;
 - if you do not, it will open the Microsoft web page that displays the Access 2010 Runtime options available to download and install:
 - select the appropriate option and follow the instructions from Microsoft to download and install Access 2010 Runtime;
- you will be asked to enter your email address to register your use of the product;



- if you installed TBF CRM Standard you will need to re-register every six months in order to confirm your continued use of the product;
- if you installed a chargeable product you will be taken to the TBF web site where you can purchase a licence to use the product;
 - you may use the product for twenty eight days without purchasing a licence;
 - if you do not purchase a licence at this stage you will need to visit www.TBF.co.uk within the next twenty eight days in order to purchase a licence;
- once you have purchased a licence, TBF will email a registration key;
- a 'New Database' message appears highlighting the need for you to name your database:
 - enter the name for your database in the box
 - then click the 'OK' button and the system will create and display your database ready for you to use
- All subsequent times you start the application, it will open with your database ready for use.



Working with Microsoft Windows and Access

1 Saving the download file

- a dialog box will appear with buttons for the options: 'Save File' or 'Cancel' and, possibly 'Run'
- click on the 'Save File' button
- a dialog box will appear prompting you to save the file to your desktop
 - unless you want to set another filename or location, click on the 'Save' button;
 - if you want to change the filename and/or location, do so using the dialog box and then click the 'Save' button;
- the dialog box will close and, when the file download has finished, you will be given a notification in your browser's usual format:
 - if you chose the prompted default name and location for saving the file, an icon with the default name will have been placed on your desktop;
 - if you chose an alternative name or location, the named file will be listed there; locate and select it using your preferred standard Windows functions (e.g., 'Start' menu, Explorer)

2 Checking and adjusting screen resolution

- Go to Start/Settings/Control panel – click to open the 'Control Panel' window and then double-click 'Display' to open the 'Display Properties' window;
- select the 'Settings' tab and locate the box 'Screen resolution'; the numbers below the slider in the box state the current screen resolution; check that these numbers are both at least as large as those stated for the minimum resolution;
 - if the numbers show your screen resolution is the minimum or greater, click 'OK' to close the window, then close the 'Control Panel' window and click 'OK' in the 'Installer Information' window to close it and return to the TBF Setup window;
 - if the numbers show your screen resolution is less than the minimum, look at the slider bar;
 - if it is right up to the 'More' end of the scale, your monitor or video card, or both, are not suitable for running the TBF software; close all the windows to abort the installation;
 - if it is not right up at the 'More' end of the scale, move it along towards the 'More' end until the resolution is shown to be at the minimum or greater;
 - if the slider reaches the 'More' end of the scale without the resolution increasing to the minimum, you will not be able to install the TBF software; close all the windows to abort the installation;
 - if you are able to reach the minimum resolution, click 'OK'; the screen resolution will be changed and a dialog box will appear asking if you want to keep the new settings; if your screen looks satisfactory to you, click 'Yes' and the dialog box will close and return you to the Control Panel window; close this window to return to the Installer Information window;
 - if you cannot see a dialog box because the screen is unreadable, wait 20 seconds and the screen will revert to its original settings; you will not be able to install the TBF software with your current video card and monitor combination; close all the windows to abort the installation.
- Close all the windows to return to your desktop.