



# **SERVICE2000 QUICK START**

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## **Installation Guide for Release 8**

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**Installation Support Hotline: 800-937-4364 x80**

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## Introduction

Congratulations on your decision to use Service2000 to automate your business. This Quick Start Installation Guide will assist you in installing and configuring your new software. Please read this guide thoroughly before starting the installation, and then follow it closely during the installation. This will help to assure that your installation goes as quickly and smoothly as possible. Service2000 has the ability to download latest version of Service2000 from the Internet. This is an included step during the installation, and at this point an Internet connection will be required.

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If you are upgrading from Senior Service Manager, pages 7-9 of this document do not apply to you. Please contact GenesisFour at 800-937-4364 x80 before starting this installation for specific instructions.

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## System Requirements

### Single User Edition

- Microsoft Windows 98, ME, NT, 2000, XP, 2003
- 500 MHz Processor
- 64 MB RAM
- 100 MB Free Disk Space
- Internet connection
- Internet Explorer 6.0 SP1 or higher (available free of charge from <http://www.microsoft.com/ie>)
- All Windows critical updates (available free of charge from <http://windowsupdate.microsoft.com>)

### Network Edition Server

- Microsoft Windows NT, 2000, XP, 2003
- 800 MHz Processor
- 128 MB RAM
- 500 MB Free Disk Space
- TCP/IP Network
- Internet connection
- Internet Explorer 6.0 SP1 or higher (available for free of charge from [www.microsoft.com/ie](http://www.microsoft.com/ie))
- All Windows critical updates (available free of charge from <http://windowsupdate.microsoft.com>)

### Network Edition Client

- Microsoft Windows 98, ME, NT, 2000, XP, 2003
- 500 MHz Processor
- 64 MB RAM
- 80 MB Free Disk Space
- TCP/IP Network
- Internet Explorer 6.0 SP1 or higher (available for free of charge from [www.microsoft.com/ie](http://www.microsoft.com/ie))
- All Windows critical updates (available free of charge from <http://windowsupdate.microsoft.com>)

### Preparation

Before beginning the actual installation, please be sure you have:

- Service2000 Release 8 Installation CD-ROM Build 84341 or higher.
- Service2000 Product Key
- An available Internet connection on the PC on which you are installing the software (on networks, an available internet connection is required only on the server)
- Full compliance with all above specifications.
- Network Edition Only: computer name of your database server \_\_\_\_\_ (fill this in now)  
*Windows XP:* right click on My Computer, then select Properties, then click on the Computer Name tab. The computer name appears next to "Full Computer Name".  
*Windows 2000:* right click on My Computer, then select Properties, then click on the Network Identification tab. The computer name appears next to "Full Computer Name".  
*Windows NT:* right click on Network Neighborhood, then select Properties and look for "Full Computer Name."

Make sure that no other software applications are running during the install process. Most installation issues are caused by other applications interfering with the installation process.

## Installation - Single User Edition

1. Establish an Internet connection.
2. Insert the Service2000 Installation CD-ROM into your CD-ROM drive. The Service2000 Installation CD-ROM will automatically display an options menu when inserted into your CD-ROM drive. *(If it does not appear, click Start, Run and then type "D:\AUTOPLAY.EXE" (where D: is not the location of your CD-ROM. If it is not, then replace D: with the correct location (E:, F:, G:, etc.)).*
3. Select "Install Service2000" from the options menu.
4. Select "Single User Edition" from the options menu.  
This will start the Single User Edition installation program.
5. Follow the installation instructions on the screen. When selecting an installation location, remember to take available hard drive space into consideration.
6. When the installation is completed, select Exit to close the CD-ROM's options menu.  
Now it's time to check for any available Internet updates.
7. Click on the Start button.
8. Select "Programs".
9. Select "Service2000".
10. Select "Update Service2000".
11. Follow the instructions on the screen. If a new version is found, it will be downloaded and installed automatically. Click "Close" to finish the installation of the update.
12. Upon completion of any update installation, a "Change Log" will appear in a web browser listing changes contained in this (as well as prior) updates. Review carefully. You may wish to bookmark this web page for future reference.
13. Click "Close" to complete the installation of the update.
14. Start Service2000 by double-clicking on the  Service 2000 icon on your desktop. If this is the first time Service2000 has ever run, the Service2000 Configuration screen will appear.
15. Proceed to Initial System Configuration on page 6.

# Installation - Network Edition

## Conceptual Overview

### Client/Server Architecture

The Network Edition consists of two separate components: the database server, and the client application. The database server is installed only on the server and provides access to the central database for all of the Service2000 clients (e.g., PC workstations). The client application is installed on each PC on which Service2000 is to run, and optionally, on the server as well.

### Windows Security

When installing Service2000 (either Server or Client) on Windows NT, 2000, XP, or 2003, full administrative access is required. Therefore you must be logged in as “Administrator” while performing the installation. Not doing so can cause the application to become unstable or simply not work at all.

### Network Shares

The Network Server installation creates two shared directories on the server named S2K and S2KClient. S2K holds information about the current Service2000 version and patch data. S2KClient holds the Network Client installer and is used to install Service2000 on your client PCs.

### Windows Users

The Network Server installation creates a Windows user named S2K\_BACKUP. This user is only used by the system to manage automated backups of your database. It is intended only for internal use by the system and should not be directly logged in. *WARNING: Disabling or deleting this user will cause your database backups to fail.*

## Server Installation

### *Installation of the Service2000 Database Server and Network Client on the server*

1. Insert the Service2000 Installation CD-ROM into your CD-ROM drive. The Service2000 Installation CD-ROM will automatically display an options menu when inserted into your CD-ROM drive. (If it does not appear, click Start, Run and then type "D:\AUTOPLAY.EXE" (where D: is not the location of your CD-ROM. If it is not, then replace D: with the correct location (E:, F:, G:, etc.)).
2. Select "Install Service2000" from the options menu.
3. Select "Network Edition" from the options menu. This will start the installation program.
4. Follow the installation instructions on the screen to install the Service2000 Database Server.
5. After the server installation is complete, you will be offered the opportunity to install the client application on the server. Although this is not required, it is recommended (even if the server is not going to be used as a workstation) in order to verify connectivity between the client application and the database server. Click "Finish" to perform the installation of the Network Client on the server. During this procedure you will be prompted for the PC name of your server (see "Client Installation" below).
6. Click Finish to complete the installation of the Network Client on the server.
7. Restart the system when prompted.
8. Log back in as administrator.
9. Start Service2000 by double-clicking on the  **Service 2000 Client** icon on your desktop. If this is the first time Service2000 has ever run, the Service2000 Configuration screen will appear, indicating that Service2000 has been installed properly. However, it is not time to go through the configuration process just yet; you must still check for any available Internet updates.
10. Click Exit from within this configuration screen to close Service2000.
11. Select the Start Button.
12. Select "Programs".
13. Select "Service2000 Database Server".
14. Select "Check for Service2000 Server Updates".
15. Follow the instructions on the screen. If a new version is found, it will download and install it automatically.
16. Upon completion of any update installation, a "Change Log" will appear in a web browser listing changes contained in this (as well as prior) updates. Review carefully. You may wish to bookmark this web page for future reference.
17. Click "Close" to finish the installation of the update.
18. Start Service2000 once again by double-clicking on the  **Service 2000 Client** icon on your desktop. If an Internet update was just installed (as per step 15 above), you will be prompted that "You must update this version of the Network Client". Click OK and then follow all on-screen instructions. Once this is completed, go on to the next step.
19. Start Service2000 once again. The Service2000 Configuration screen will appear. Click "Exit" to close it (We'll need it soon, but not quite yet.)
20. Now it's time to install the Network Client software on all the other PCs which are to run Service2000.

## Client Installation

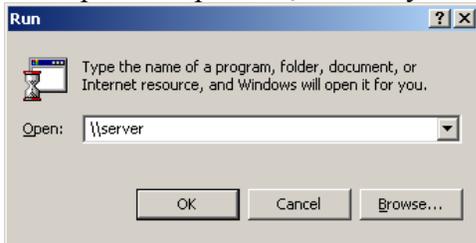
### *Installation of the Service2000 Network Client on all PCs other than the server*

NOTE: With the exception of the very first installation of the Network Client on the server, the installation of the Network Client does not use the CD. It is done by navigating to an installation file on the server from the client PC.

1. Working from the first client PC, log in as Administrator.
2. Click on Start, Run. A window will appear.
3. Type as follows: **\\Your Server Name** (include the double backslashes).

For example, if your server name is SERVER, type **\\server** (as shown) and then click OK.

If you get a permissions error, the Windows user currently logged into this PC does not have permission to access the S2K client share on your server. Confirm that you are logged into this PC as administrator. If you are, check to see if the administrator's password on this PC is the same as the administrator's password on the server. They **MUST BE EXACTLY THE SAME**. If the problem persists, contact your network administrator for assistance.



4. Double-click on the "S2KClient" folder (NOT the "S2K" folder).
5. Double-click on the "Service2000 Network Client" icon to start the installation. (The file extension ".exe" may or may not appear depending on your particular system.)
6. Follow the instructions on the screen.
7. Enter the name of your server when prompted (do not include any backslashes).
8. When the installation is complete, reboot if prompted to do so.
9. Double-click on the **S Service 2000 Client** icon on your desktop to start Service2000. If a message appears that "You must update this version of the Network Client", click on OK and follow the instructions on the screen to download and install the update. (This update is being obtained by this client PC from your server).
10. Click "Close" to complete the installation of the update.
11. Start Service2000 by double-clicking on the **S Service 2000 Client** icon on your desktop. If this is the first time Service2000 has ever run, the Service2000 Configuration screen will appear.
12. Repeat steps 1-11 to install and update the Service2000 Network client on all the other PCs.

Once all the Network Clients have been installed, you may proceed to "Initial System Configuration". Go to the next page of this document.

## Initial System Configuration

The first time you run Service2000, three very simple screens will prompt you to enter initial configuration data about your business. After these three screens have been completed, you will be prompted for your Serial Number and Product Key, which will enable any optional Product Modules you may have purchased with the system. After that, the system will start and run normally. Note that any information entered into the three initial setup screens can be changed at any time later, so don't worry if you make a mistake.

### Setup Screen #1 of 3

This dialog asks you for your company information.

- **Name & Address:** This is your company's name and address. It is printed on a number of documents produced by Service2000.
- **Phone & Fax:** This is your company's main phone and fax numbers. They are printed on a number of documents produced by Service2000.
- **Administrator's Password:** The Administrator account is a special type of account that has access to every area of the system. The password can be anything you like (including blank) and can be changed later if desired.

Once you have completed this screen, click Next to continue and go to the next page of this document.

## Setup Screen #2 of 3

The screenshot shows a dialog box titled "Service 2000 Configuration". It contains the following fields and values:

- Primary Division: Automotive Repair
- Division Abbreviation: AR
- Labor Rate: \$ 60.00
- Average Labor Cost: \$ 18.00
- Service Supplies Rate: \$ 0.04

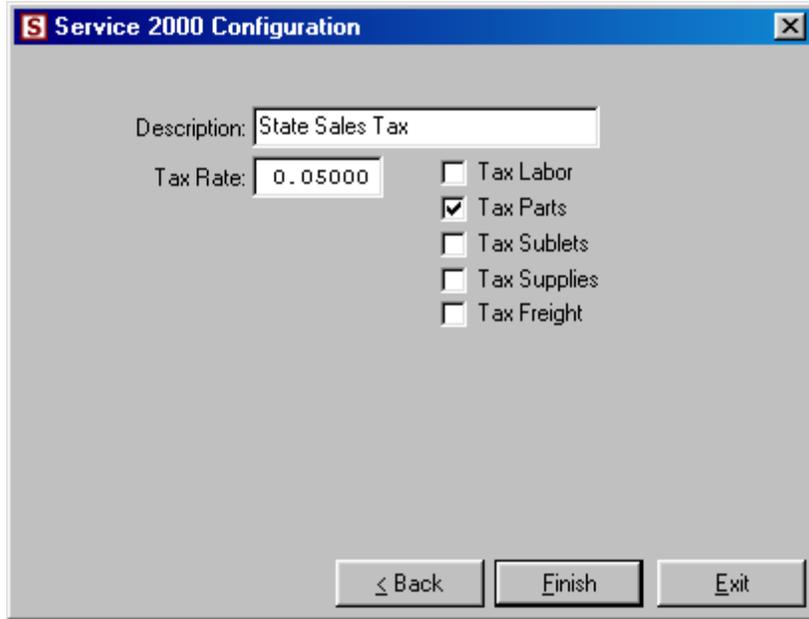
At the bottom of the dialog are three buttons: "< Back", "Next >", and "Exit".

This dialog configures your primary Division. Divisions (also commonly referred to as profit centers) enable you distinguish between distinctly different types of service activities you may provide, such as auto and truck, or foreign and domestic, or auto and marine service, to name just a few examples. Service2000 allows you to have as many divisions as you like. It also allows you to control many aspects of each division, such as its labor rate, its service supplies rate, and whether the company or the division name appears on the printed invoice. Most situations call for at least an auto repair division, which is why this screen appears pre-populated accordingly. More divisions can be added later if needed. If you only do auto repair then you probably only need one division. If this is the case, simply accept the default division name and the 2 letter abbreviation as it appears when you first come to this screen.

- **Primary Division:** This is the name of your primary Division.
- **Division Abbreviation:** This is a 2 letter abbreviation for the Division. It is the primary method of selecting the Division from within Service2000.
- **Labor Rate:** The default labor rate for this Division. You can also override this number on a per Customer or Labor Line basis.
- **Average Labor Cost:** This number is used for job profitability and has no impact on your accounting system. It is meant to be an "Adjusted Labor Cost". To calculate this cost, convention is to simply average your technician pay rate and then add a few dollars per hour for other hard technician-related costs such as uniforms and workman's compensation insurance. Ultimately it is your decision.
- **Service Supplies Rate:** This is the Service Supplies rate as a percentage of billed labor. The industry standard is typically 4-6% of labor. Service Supplies are intended to recover your costs for otherwise non-billable shop supplies such as shop rags, aerosols and other chemicals, hardware such as nuts, bolts, wire-ties, etc. The format of this data is in decimals so 4% of labor would be \$0.04 and 6% would be \$0.06.

Once you have completed this screen, click Next to continue and go to the next page of this document.

### Screen Number #3 of 3



Service 2000 Configuration

Description: State Sales Tax

Tax Rate: 0.05000

Tax Labor

Tax Parts

Tax Sublets

Tax Supplies

Tax Freight

< Back   Finish   Exit

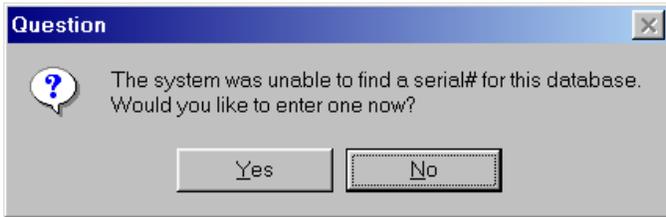
This dialog configures your Sales Tax. Service2000 has provisions for elaborate tax schemes involving multiple taxes that exist in some states and Canada. If you need to configure for such circumstances, you will do this from within the program, not from within configuration. Just set up your most fundamental sales tax now.

- **Description:** This is a description of the sales tax you are configuring. Most users can just use the default (“State Sales Tax”).
- **Tax Rate:** This is the tax rate in decimal form (5% would be 0.05, 8.25% would be 0.0825).
- **Tax Labor, Parts, Sublets, Supplies, and Freight:** This configures what items will have sales tax applied to them.

Once you have completed this screen, click Finish. You must now enter your serial number and Product Key, after which the system will start and run normally. Go to the next page of this document.

# Serialization & Module Activation (Product Key Entry)

## Installing the serial number



When the above screen appears, click on Yes to continue.



Enter JUST your serial number (not your Product Key) and click on OK.

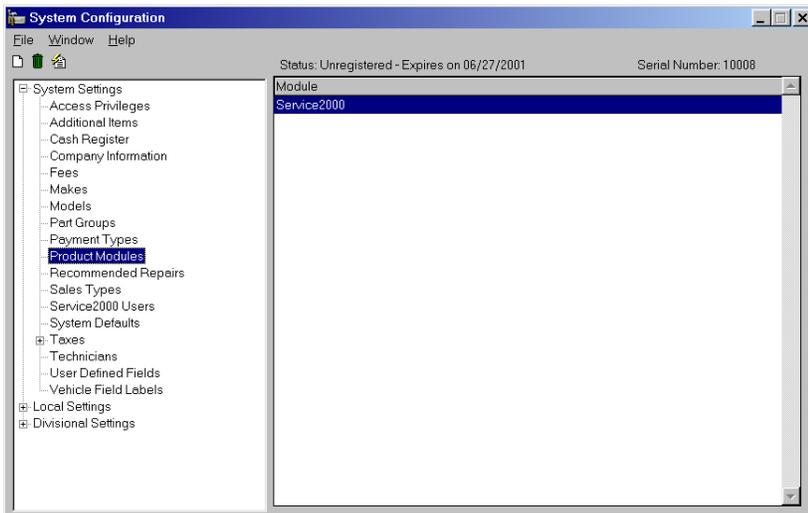


Service2000's Main Toolbar will appear, indicating that the serial number has been accepted. At this stage only the Base Module of Service2000 is activated.

## Module Activation (Product Key Entry)



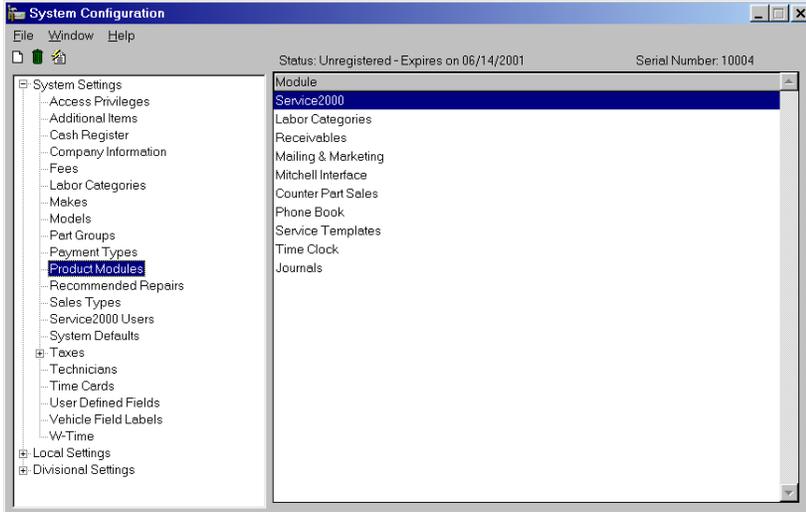
From the Main Toolbar, click on the Configuration icon (last icon on the right).



Click on System Settings, Product Modules. Your screen should now appear as shown above. Click on File, Install Module. The Product Key dialog should appear (as shown below).



Enter the Product Key which has been provided with your system and click on OK.  
The Product Modules you have purchased will immediately appear as shown in the screen below.



Close and restart Service2000 in order for the new modules to become available for use.  
Congratulations - your copy of Service2000 is now activated and ready to use. Please proceed to the next page of this document in order to configure system backup.

**NOTE: The first customer you create will have no first and last name fields. This is normal. Create your own company as the first customer. Starting with the second customer created, the first and last name fields will appear.**

## Backing Up Your Database

- In order to backup your Service2000 system, you will need to follow these instructions closely.
- Setting up your system to back up properly is your responsibility.
- Do not skip this critical step in the installation process.

### General Precautions and Recommendations

In order to assure that your data is protected, a daily backup of your database must be performed. There are many different methods of configuring computer systems to back up, and equally as many opinions as to how it should be done. Some specific backup utilities are provided by the Service2000 installation (Network Edition only) and are discussed here. Some general guidelines are discussed as well, so this section should be read by all users. However you do it, do not skip this critical step in the installation process.

A full system backup using a modern-day tape backup system (with appropriate backup software) capable of backing up your entire system is highly recommended. CDRW, Zip drives, or other similar devices generally do not have the capacity to back up the entire contents of your hard drive, and therefore are not recommended. Typical recommended formats: Travan, DAT, and OnStream. Redundancy (e.g., mirroring) is also recommended on the computer which is storing your database.

### A Warning About Open Files

Most backup systems will not back up open files (files in use by an application) - they are almost always skipped by the backup process unless you have purchased specific backup software designed to back up open files. This includes executables, documents, and (most importantly) databases. Always assume that open files WILL NOT BE BACKED UP.

Open file management software is expensive and rarely found on most systems – there's a good chance you don't have it. Therefore, never assume that just because you have a tape drive that backs up your entire hard drive that your Service2000 database (or any other files that might have been left open while the tape backup was running) were properly backed up. Unless you precisely follow the instructions provided below, your Service2000 database is likely to be skipped by your back up process.

### Single User Edition - Backup Information

There are no specific backup functions provided with Service2000 Single User Edition. In order to assure that your Service2000 database is not open when backing up, simply close the program before backing up. Service2000 must not be running while the backup is taking place. This means that if you plan to configure your system to automatically backup at night, you must ensure that Service2000 is not running before you leave. This cannot be overemphasized. Service2000 must not be running whenever the system is being backed up. If you try to restore from a tape that was created while Service2000 was running, it is likely that the Service2000 database on this tape will be useless. Ideally, you should backup your entire hard drive, but at minimum you should backup the entire Service2000 folder (C:\Service2000 by default). It is vital that the entire Service2000 folder is backed up. Selecting individual files for backup will not capture everything needed, and will make restoring your data from the backup media impossible.

## Network Edition – Backup Information

The Network Edition uses a database server process to manage the database, which means that the physical database files are in use and open at all times, and therefore will be skipped by conventional backup systems.

In order to backup your database, the system must make a copy of it on your server's hard drive. It is this special file that you must backup to your backup media (not your actual, live database files).

Service2000 includes an open file backup utility and a batch file that produces this special copy for you. This utility creates a single file on your hard drive named **S2K.BKU** which is a consolidation of the multiple files that comprise the Service2000 database. In the unlikely event that there was a need to restore from your backup media, the restore would be done from the **S2K.BKU** file.

The Service2000 installation configures your system to automatically run this utility at 12A.M. (midnight) by creating a new Scheduled Task (**regardless of any other Scheduled Tasks that might have previously existed**). You may change the start time of this task by clicking on Start, Programs, Service2000 Database Server, Schedule Automatic Backup. However, it is not normally necessary to change the start time.

The batch file that runs the utility is called **BACKUP.BAT**. This file lives in the AdminScripts directory of the Service2000 Network Server (C:\Service2000DBS\AdminScripts by default). Running this file will create the **S2K.BKU** file in the **Backup** directory of the Service2000 Network Server (C:\Service2000DBS\Backup by default).

One day after the installation, you should verify the existence and date of this file:  
**C:\Service2000DBS\Backup\S2K.BKU**

Further, you should check the date of this file for a few days to make sure that it is being rewritten on a nightly basis.

Also, it is imperative that this backup utility runs and completes *before* your tape backup (or other external backup) begins. In configuring the start time for your external backup, be sure to allow enough time for this to occur. (Normally 1 hour is sufficient).

Service2000 also includes a separate utility to assist in automatically scheduling the **BACKUP.BAT** program at any time you wish. You can launch this utility by selecting "Schedule Automatic Backup" from Start / Programs / Service2000 Database Server.

GenesisFour provides fee-based backup configuration services. If you would like GenesisFour to provide and/or configure your backup solution please call GenesisFour Technical Support at (978) 443-4440 X10 or email your request to [support@genesisfour.com](mailto:support@genesisfour.com).

### Additional Information

A detailed discussion of backup considerations and recommendations is available at: [www.service2k.com/systemrequirements.htm](http://www.service2k.com/systemrequirements.htm)

## Internet Updating (Single User Edition)

Note: Make sure that Service2000 is not running before you begin.

1. Click on the Start button.
2. Select “Programs”.
3. Select “Service2000”.
4. Select “Update Service2000”.
5. Follow the instructions on the screen. If a new version is found, it will be downloaded and installed automatically. Click “Close” to finish the installation of the update.
6. Upon completion of any update installation, a “Change Log” will appear in a web browser listing changes contained in this (as well as prior) updates. Review carefully. You may wish to bookmark this web page for future reference.
7. Click “Close” to complete the installation of the update.
8. Start Service2000 by double-clicking on the  Service 2000 icon on your desktop.

In order to confirm that you are on the latest build after performing an Internet update, from the Service 2000 Main Toolbar click on Help, About Service2000. A window will appear with the build number. This build number should match the highest build number on the Change Log.

## Internet Updating (Network Edition)

*Updating the database server:*

1. Make sure no Service2000 sessions are running.
2. Working from the server, select the Start Button.
3. Select “Programs”.
4. Select “Service2000 Database Server”.
5. Select “Check for Service2000 Server Updates”
6. Follow the instructions on the screen. If a new version is found, it will download and install it automatically.

*Updating the network client (on the server and on all the clients):*

1. Select “Start”.
2. Select “Programs”.
3. Select “Service2000”.
4. Select “Update Service2000 Client”.
5. Follow the instructions on the screen to complete the update installation. Reboot if instructed.
6. Restart Service2000 and log in.

In order to confirm that you are on the latest build after performing an Internet update, from the Service 2000 Main Toolbar click on Help, About Service2000. A window will appear with the build number. This build number should match the highest build number on the Change Log.