

# ShopPAK Client Installation Instructions

## 1. Install ShopPAK Client Software

Note: ShopPAK **requires ProjectPAK to be installed on the same PC**. Thus, even if your ShopPAK user won't be running ProjectPAK, make sure that you've installed ProjectPAK on the PC you are about to install ShopPAK upon.

1. Click the Download button. Once downloaded, open the ShopPAK.zip file and double-click ShopPAK.exe to begin installation. You'll be prompted for the password that was provided to you. Click Run, if prompted, and follow the instructions on the screen. We recommend keeping the installation defaults.

Note: If you are running Windows 7 or higher, it is highly recommended that you start the installation program by right-clicking on it and choosing the Run As Administrator command.

You must be logged on as the actual user when installing the program. If the actual user of the PC does not have install permissions, you can install via an Administrative logon, however, you'll need to call TradeSoft support to manually set up the ODBC data source configuration.

## **New Customers Only**

5. Start ShopPAK by selecting **Start | Programs | ShopPAK | ShopPAK**. You'll be presented with a logon window.

Enter ShopPAK into the 'User id' field  
Enter begin into the 'Password' field.


Refer to Chapter 2, page 1 in the ShopPAK User's Guide for instructions on logging onto ShopPAK and setting up security. Also, you'll definitely need to read all of Chapter 4 for instructions on setting up ShopPAK options, value lists, and default behavior. You can access the ShopPAK User's Guide either via the ShopPAK Start menu folder or inside ShopPAK by going to **Help | User's Guide**.

## 2. Set Number of Concurrent Database Users

Before you can use ShopPAK, you need to set the number of concurrent licenses you've purchased. Follow the instructions below to update your concurrent license count. **MAKE SURE NOBODY IS CURRENTLY USING ShopPAK OR ANY OTHER TRADESOFT APPLICATION.** Only the TradeSoft server should be running.

Note: This only needs to be done once, from any PC that you've installed ShopPAK upon.

1. On any PC that you've installed ShopPAK on, select **Start | Programs | ShopPAK | ShopPAK Concurrent Seat Utility**.

2. Enter the code you were provided into the “License Code” area.
3. Click the  button on the speedbar. This connects the utility to the shared database and updates the number of concurrent users. When it finishes, the utility displays the number of concurrent users it has set. Make sure this matches the number you’ve purchased from TradeSoft, Inc.
4. Close the window.

### **3. ShopPAK License Verification**

The first time you start ShopPAK, it displays a License Verification dialog box. Verifying a new user’s license requires that your computer is connected to the internet. You’ll be prompted for your company name, your name, and your customer number that was provided to you.

### **4. Install ShopPAK Alerts Generator (Optional)**

Alerts is a powerful project management tool that lets users set up a number of ‘threshold’ events that ShopPAK monitors, and when that situation occurs, *alerts* you with pertinent status information. In order for ShopPAK to monitor and notify the users of these alert transactions, you need to install the Alerts Generator.

Note: We recommend installing the Alerts Generator on the same PC that has the shared ProjectPAK / ShopPAK database and Sybase Database Server. However, you may install the ShopPAK Alerts Generator on any networked PC you like. Just remember that you should only install one instance of this program on your network.

Also remember to make sure that the ShopPAK Alerts Generator is running before using the Alerts functionality in ShopPAK.

1. Open the ShopPAK.zip file and double-click ShopPAK Alerts Generator.exe to begin installation. Click Run, if prompted, and follow the instructions on the screen. We recommend keeping the installation defaults.
2. Start ShopPAK by selecting **Start | Programs | ShopPAK | ShopPAK Alerts Generator**. You should see the Alerts Generator window display. You should leave the ShopPAK Alerts Generator running all day. Minimize it if you like.

We recommend that you automate this by adding a shortcut of the ShopPAK Alerts Generator to the Startup folder on the PC you installed it on. To do this, go to Start | Programs | ShopPAK. Select the ShopPAK Alerts Generator shortcut and hold down the left mouse button. Drag the selected shortcut to the Startup folder, also located in Start | Programs.

Before you can use the ShopPAK Alerts Generator, you need to set up the Alerts system in ShopPAK. Refer to Chapter 22 in the ShopPAK User’s Guide for information and instructions on configuring and setting up Alert. You can access the ShopPAK User’s

Guide either via the ShopPAK Start menu folder or inside ShopPAK by going to **Help | User's Guide**.