

GETTING STARTED GUIDE

BaskWare



Thank you for choosing BASKWARE.

Welcome to the most exciting innovation to date in the Gift Industry. BaskWare is a tried and true software package that is currently being used in businesses in over 40 different states and 3 countries. BaskWare was designed & developed because we felt that no software in the market met the demands of the thousands of Gift Businesses worldwide. We saw this as a challenge and spent 2 years evaluating the needs of consumers and business owners. The result is a product that will revolutionize the industry and allow your Gift Business to grow without limits.

BaskWare offers a simple, flexible yet sophisticated user interface that allows you to fully automate your Gift Business. Key features include Inventory Management, Accounting Functions, Purchase Ordering, Streamlined Order Entry, Order Scheduling, Secure Multi-User Environment, Extensive Reporting Capabilities, Cross Branding and Product Comparison features. BaskWare automates most all of the complex tasks of running your operation. This level of automation allows small businesses consisting of only a few individuals to handle the volume of a large corporation.

IMPORTANT INFORMATION:

Default login information
User ID: **ADMIN**
Password: **ADMIN**

**** If you use DSL or Cable modem for Internet Access, it is important to configure your outgoing email server within BaskWare. Not doing this could result in erratic behavior. Your Internet Service provider can tell you what your outgoing email server is called.**

Instructions:

- STEP 1: Login to BaskWare as ADMIN**
- STEP 2: Click the Administration Tab – Click the Lock to enter the ADMIN module.**
- STEP 3: Click the PREFERENCES tab**
- STEP 4: Type your Outgoing Email Server into the line labeled MAIL SERVER**
- STEP 5: Type your FROM ADDRESS and FROM NAME for emails**
- STEP 6: Click the SAVE button on the menu bar**

Systems Requirements

BaskWare is designed for 32-bit operating systems running Windows 95, 98, ME, NT 4.0, and 2000.

We highly recommend using BaskWare with *Microsoft Windows 2000*. You will get the most stable and efficient working system using this option.

- Intel Pentium or AMD processor (recommended)
- 32 MB RAM or more (64 MB or more recommended)

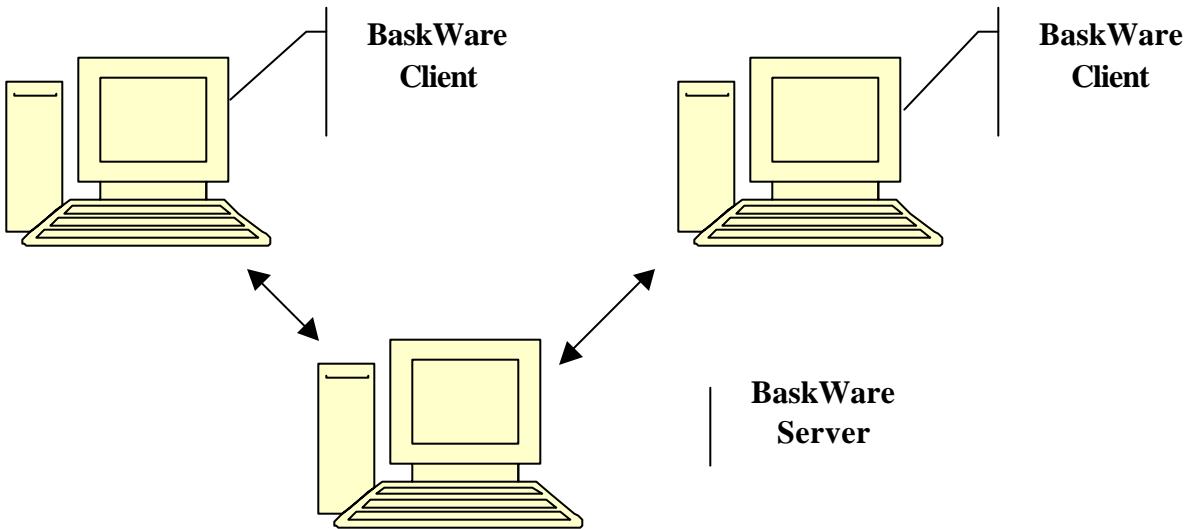
- 32-bit operating system, such as Microsoft Windows 98, ME, NT 4.0, and 2000
- 40 MB free disk space
- TCPIP Network (For Professional Edition users that wish to use the network option)
- Faxing requires an E-Fax account. \$9.95 per month at www.Efax.com

We recommend setting your video card to run at 1024 x 768 resolution to get full views of the screen.

Any printer supported by Windows® can be used.

Professional Edition Installation

The professional version install has the capability to be used on a computer network; thus you will receive 2 CDROMs with your software package. A SERVER CD and a CLIENT CD. An installation with the CLIENT CD will not operate alone. It requires that a SERVER installation exist on your computer network. Networking your computers can be a tremendous benefit to your business and will allow BaskWare to share a single database across multiple computers at the same time.



Single Computer

**** Use this option if you are installing a DEMO copy**

**** Use this option if you only intend to use BaskWare on ONE computer.**

Installation from CD

Step 1 – Insert the *SERVER CD* into your CDrom drive on your computer

Step 2 – If the install begins automatically, then skip to STEP 6

Step 3 – Click START then RUN

Step 4 – Click BROWSE and locate the SETUP.EXE on the CDROM drive

Step 5 – Execute the file and follow the directions until it is complete.

Step 6 - After the installation process begins, click the next button several times until you see the files being copied onto your computer. After this is complete Click the FINISH button. Return to your desktop and an icon for BaskWare can be seen.

Step 7 – After installation, locate the BaskWare logo on your Windows Desktop and double-click the icon to run the program.

Multi-Computer (Network)

**** Use this option if you intend to use BaskWare on your computer network with more than one computer.**

It is assumed you already have a TCPIP Network in place to support this feature. If not, visit the website <http://www.microsoft.com/homenet> for lots of information on how to establish a TCPIP network.

SERVER Installation from CD

Step 1 – Insert the *SERVER CD* into your CDrom drive on your computer

Step 2 – If the install begins automatically, then skip to STEP 6

Step 3 – Click START then RUN

Step 4 – Click BROWSE and locate the SETUP.EXE on the CDROM drive

Step 5 – Execute the file and follow the directions until it is complete.

Step 6 – - After the installation process begins, click the next button several times until you see the files being copied onto your computer. After this is complete Click the FINISH button. Return to your desktop and an icon for BaskWare can be seen.

Step 7 – After installation, locate the BaskWare logo on your Windows Desktop and double-click the icon to run the program.

CLIENT Installation from CD

Step 1 – Insert the *CLIENT CD* into your CDrom drive on an additional computer other than the SERVER

Step 2 – If the install begins automatically, then skip to STEP 6

Step 3 – Click START then RUN

Step 4 – Click BROWSE and locate the SETUP.EXE on the CDROM drive

Step 5 – Execute the file and follow the directions until it is complete.

Step 6 – - After the installation process begins, click the next button several times until you see the files being copied onto your computer. After this is complete Click the FINISH button. Return to your desktop and an icon for BaskWare can be seen.

Step 7 – After installation, locate the BaskWare logo on your Windows Desktop and double-click the icon to run the program.

IMPORTANT: The SERVER BaskWare Edition must be running and the network must be operation in order to Connect from a CLIENT computer.

Standard Edition Installation

Installation from CD

Step 1 – Locate the CD-rom drive on your computer

Step 2 – Click START then RUN

Step 3 – Click BROWSE and locate the SETUP.EXE on the CDROM drive

Step 4 – Execute the file and follow the directions until it is complete.

Step 5 – After installation, locate the BaskWare logo on your desktop and double-click to run.

Upgrades

Upgrade From Previous Version

Step 1 – Restart your computer

Step 2 – Insert the Upgrade CD into your CD-Row drive.

Step 3 - When prompted to Backup your Database. PLEASE DO THIS as it will save your data in case of an error.

Step 4 – Follow the instructions listed above for CD INSTALLATION

Re-installing

** NEVER Un-Install and Re-Install the software without first making a backup of your database.

If you find yourself with the need to re-install the software and replace a backed up version of your database.

Please contact a support representative to help you through the process.

TIPS & TRICKS

These are some of the most beneficial tips and tricks to using BaskWare. We hope these answer some of your questions after getting started.

** Simply hit the F1 key on your keyboard at anytime for instance ONLINE HELP.

** It's VERY IMPORTANT to move your order shipments from Status to Status (Open, Assembled, Shipped, Received). Inventory will NOT be deducted from Quantity on Hand until the shipment has been placed into the ASSEMBLED status.

** When registering BaskWare, Please note that your **Registration Code** is on your invoice.

** Choosing the AUTO LOGIN option will speed up the login process; however you will not have access to see all the tabs under the Administration Module. This is a security feature. To access all the tabs in the Administration module, you MUST be logged into BaskWare as ADMIN. To disable the Auto Login feature, visit the Administration module and click the Security Tab. Simply uncheck the Auto Login box and close BaskWare. Upon restarting, you will be prompted to login. Login as ADMIN.

** To best view all screens make sure to set your computers video resolution to 1024 x 768.

** It is a good idea to enter your information in a certain sequence. This is not required but will maximize your efforts. Try entering your Vendors first, followed by Products and associate them to the appropriate vendor, next use the Gift Basket Builder to create your Gift Baskets using the products. Lastly, enter your customers.

** Green Fields are required information. Please make sure all green fields are accounted for before saving the information.

** Several screens offer "Drag & Drop" capabilities. To use this feature simply hold down the left mouse button while dragging to the desired location. An Example of this feature is in the Gift Basket Builder.

** Code Lookups in the Administration Tab is a way to customize your drop down lists within the software.

** Gift Basket Markup Formula can be selected in the Administration module under the Preferences tab. There are 2 formulas to choose from.

** How to use the search Screens.

Let's take the Gift Basket Module as an example.

The areas in white at the top of the page labeled (Basket Name, Product Code, and Description) are used as your searching criteria. For instance to search for a basket named "Christmas Cheer" you could simply enter "Christmas Cheer" in the Basket Name field and click Retrieve. This would bring back the basket named as such. Another option would be to type in "Christmas" in the Basket name field and click Retrieve. This would bring back all matches that had names that began "Christmas". The same concept applies for the other fields at the top (Product Code and Description).

All search screens in BaskWare work this way and are very flexible. Play around with it and some you will be searching like a pro!

** Selection Tips – Clicking items once will highlight the item. To Deselect the item, simply double-click the item and it become un-highlighted.