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Getting Started

Welcome to the **Upgrading to Shortcuts V7.3 Installation Checklist!** This document will take you through the steps necessary to upgrade your copy of Shortcuts V7.1 to the latest version of Shortcuts V7.3.

In order for you to be able to upgrade to Shortcuts V7.3, you will need to be running Shortcuts V7.1 (version 7.1.76 or higher) on your computer.

The steps you need to perform are as follows:

1. **Determine your current version of Shortcuts.** This step will determine which of the following steps you need to start at in order to upgrade to Shortcuts V7.3.

 *If you have any version of Shortcuts that is earlier than 7.1.76.17983, you **MUST** contact the Shortcuts Helpdesk for assistance (see “Determine your current version of Shortcuts” on page 2 for more information).*

2. **Ensure that your computer meets the Minimum Requirements.** Before beginning, it's vital to ensure that your computer meets the minimum requirements for Shortcuts V7.3.
3. **Upgrading from Shortcuts V7.1 OR Shortcuts V7.2 to Shortcuts V7.3.** This final step will take you through the process for upgrading from Shortcuts V7.1 OR Shortcuts V7.2 to Shortcuts V7.3.

If you would like assistance with your upgrade, please complete and return the Upgrade and Training Options flyer included with your upgrade pack, or call the Shortcuts Head Office on 1300 66 73 74 to obtain fee details and to schedule a day and time.

A typical upgrade should be completed within two hours, provided your computer meets the minimum requirements for Shortcuts V7.3 (see “Ensure that your computer meets the Minimum Requirements” on page 3).

Should you require additional training in using Shortcuts V7.3, we can provide this along with the installation. Please complete and return the Upgrade and Training Options flyer included with your upgrade pack.

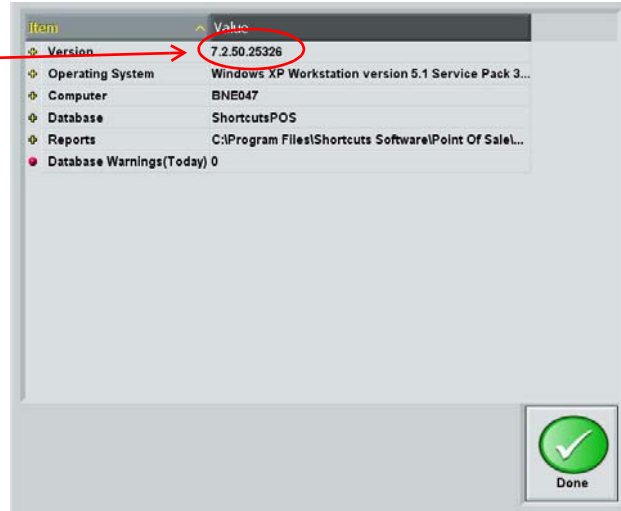
Determine your current version of Shortcuts

Before you can start upgrading your software, you first need to know which version of Shortcuts you are currently running. This will determine which versions of Shortcuts you need to install before you can upgrade to Shortcuts V7.3.

To check what is your current version of Shortcuts:

1. In Shortcuts, press the Shift + F1 keys together. This will display the information window. Note down your version number as indicated in the picture below, then go to Step 2.

Your version number is located here



If pressing Shift + F1 does not work, exit Shortcuts if it is running. Run Shortcuts again, and check the version number in top left corner of the splash screen.

Your version number is located here




2. If your version number is 7.1.76 or higher, you are ready to install Shortcuts V7.3. Go to the next page.

If you have any version of Shortcuts that is earlier than 7.1.76, please contact the Shortcuts Helpdesk on 1300 66 73 74 (8.00am - 3.00pm EST, Monday to Friday), or by e-mail at "support@shortcuts.com.au", to obtain detailed upgrade instructions and advice.

Ensure that your computer meets the Minimum Requirements

Shortcuts recommends the Windows XP Pro, Windows Vista Business and/or Windows 7 Professional operating systems for running Shortcuts V7.3, but also supports certain other operating systems.

 ***If you are running Windows XP Pro, you must update your copy of Windows to the latest Service Pack (SP) before attempting to install Shortcuts. For detailed instructions on how to update your copy of Windows, visit the Microsoft Windows Update page at: <http://update.microsoft.com/windowsupdate/>***

The following table outlines the hardware requirements for Shortcuts V7.3. For best performance, the recommended specifications should be used:

Recommended - ❖ Minimum - ◆ Supported - ● Not Supported - ○	Standalone Machine	Server - 2 Machine Network	Server - 3 Machine Network	Server - 4+ Machine Network	Client Terminals
Processor					
2.0 GHz	◆	◆	◆	◆	◆
3.0 GHz or Core 2 Duo/Quad Core	❖	❖	❖	❖	❖
Tri-Core Processors	○	○	○	○	○
Memory					
1GB+ RAM	◆	◆	◆	◆	◆
2GB+ RAM	❖	❖	❖	❖	❖
Hard Disk Space					
1 GB+	◆	◆	◆	◆	◆
2 GB+	❖	❖	❖	❖	❖
Operating System					
Microsoft Windows 7 Professional (32 & 64-bit)	❖	❖	❖	❖	❖
Microsoft Windows 7 Enterprise (32 & 64-bit)	●	●	●	●	●
Microsoft Windows 7 Ultimate (32 & 64-bit)	●	●	●	●	●
Microsoft Windows 7 Home	○	○	○	○	○
Microsoft Windows Vista Business (32 & 64-bit)	❖	❖	❖	❖	❖
Microsoft Windows Vista Ultimate (32 & 64-bit)	●	●	●	●	●
Microsoft Windows Vista Home	○	○	○	○	○
Microsoft Windows XP (SP2) (32 & 64-bit)	❖	❖	❖	❖	❖

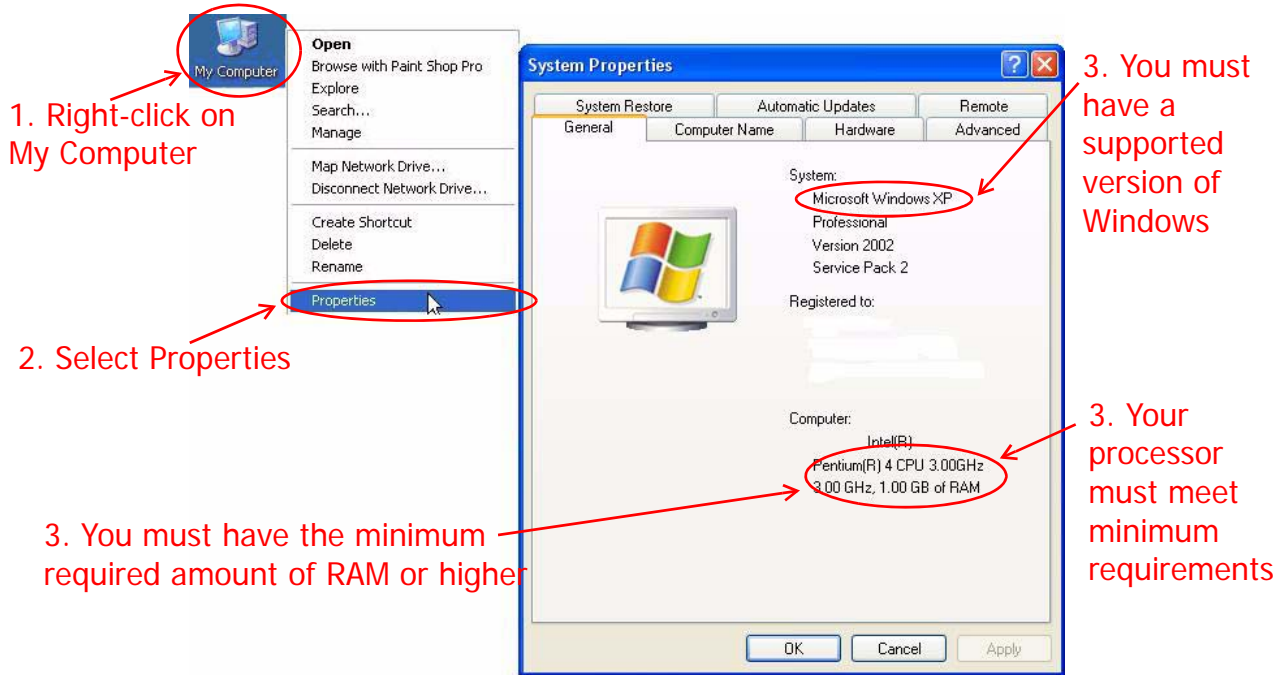
Recommended - ❖ Minimum - ◆ Supported - ● Not Supported - ○	Standalone Machine	Server - 2 Machine Network	Server - 3 Machine Network	Server - 4+ Machine Network	Client Terminals
Mac supported on Boot Camp	●	●	●	●	●
Microsoft Windows 2000 Pro (SP4)	○	○	○	○	○
Microsoft Windows Server 2000	●	●	●	●	●
Microsoft Windows Server 2003	●	●	●	●	●
Microsoft Windows Server 2008	○	○	○	○	○
Networking (between Shortcuts Terminals)					
Wireless Network	○	○	○	○	○
Local Area Network (Cable)		❖	❖	❖	❖
Internet Access (not required to run Shortcuts) *					
High speed internet access (e.g. DSL) including suitable modem	❖	❖	❖	❖	❖
Security					
Firewall (Windows Firewall must be turned on)	❖	❖	❖	❖	❖
Anti-virus	❖	❖	❖	❖	❖

* An Internet connection is required if you wish to use any of our 24ON Products (BookME, Set & Forget Marketing, BackMEup, ConnectME, SMS Confirmations). An Internet connection is highly recommended for troubleshooting.

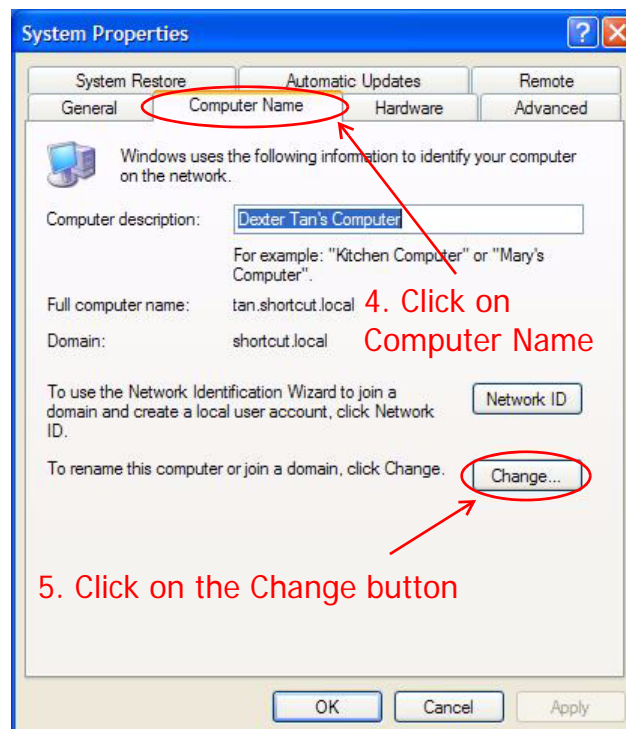
Under minimum specifications, performance related issues may arise when running Shortcuts V7.3 outside normal usage. Shortcuts will only support performance related issues if clients are running the recommended hardware specifications. **Shortcuts may charge additional fees to undertake investigations for non-recommended operating systems.**

To check if your computer meets the minimum requirements:

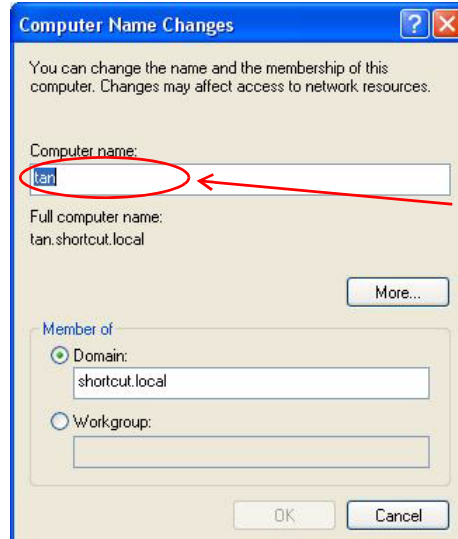
1. Right-click on the **'My Computer'** icon on your Windows desktop (usually located on the top left-hand side of the screen). A pop-up menu will appear.



2. Select the **Properties** option. The Systems Properties window will appear.
3. Ensure that you are using a supported version of Windows, and that you meet at least the minimum requirements for RAM and processor.
4. Your computer name must not be longer than 15 characters, or Shortcuts V7.3 will not be able to run properly. To check the length of your computer name, click on the **Computer Name** tab.



5. Click on the **Change** button. The Computer Name Changes window will appear.



6. Check your computer name

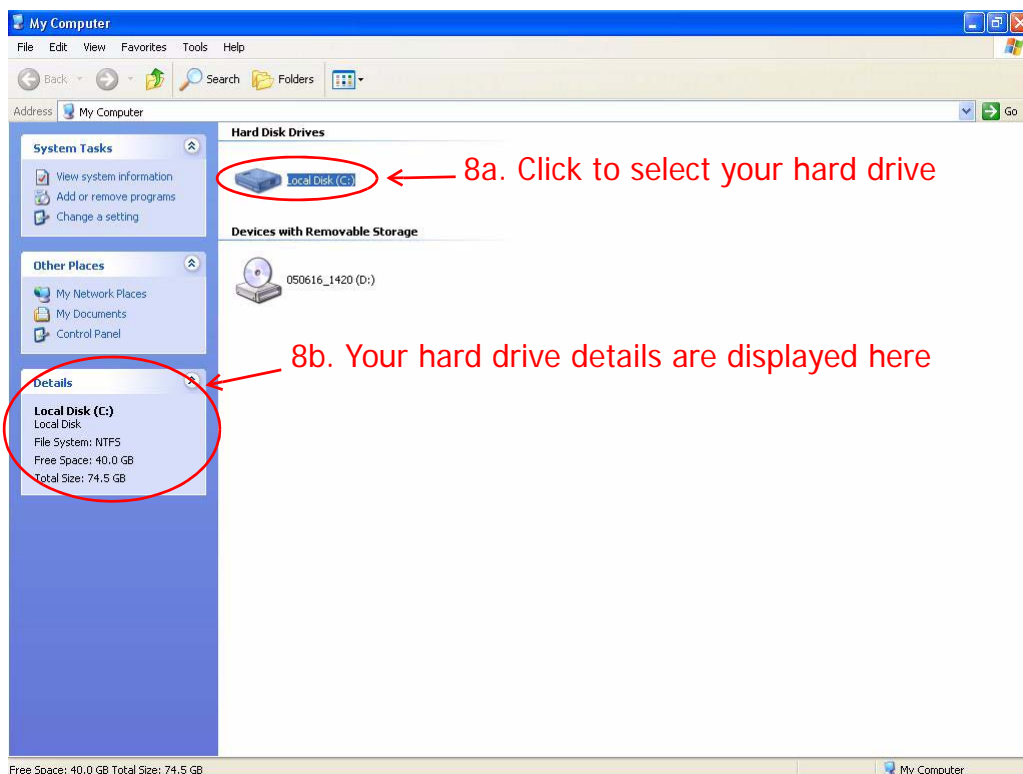
6. Check your computer name to ensure that it is not longer than 15 characters.

If your computer name is longer than 15 characters, change it to one that is shorter than 15 characters, then click **OK** until you are back at the Windows Desktop.

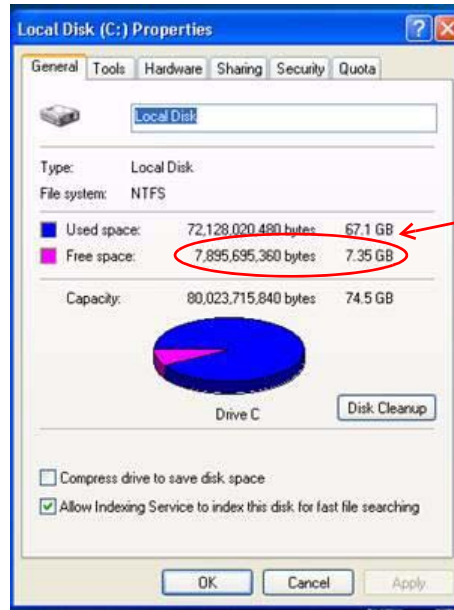
Otherwise, click **OK** until you are back at the Windows Desktop.

7. Double-click on the '**My Computer**' icon on your Windows desktop. A 'My Computer' window will appear.


8. Click on the icon representing the hard drive you wish to install Shortcuts to. The hard drive's details, including free and used space, will be displayed on the screen. Ensure that you have at least the minimum amount of free space available on your hard drive.



9. If the details are not displayed as shown in the above screenshot, right-click on the hard drive you wish to install Shortcuts to and select **Properties** from the pop-up menu that appears. Ensure that you have at least the minimum amount of free space available on your hard drive.



9. Your hard drive's free space is displayed here.

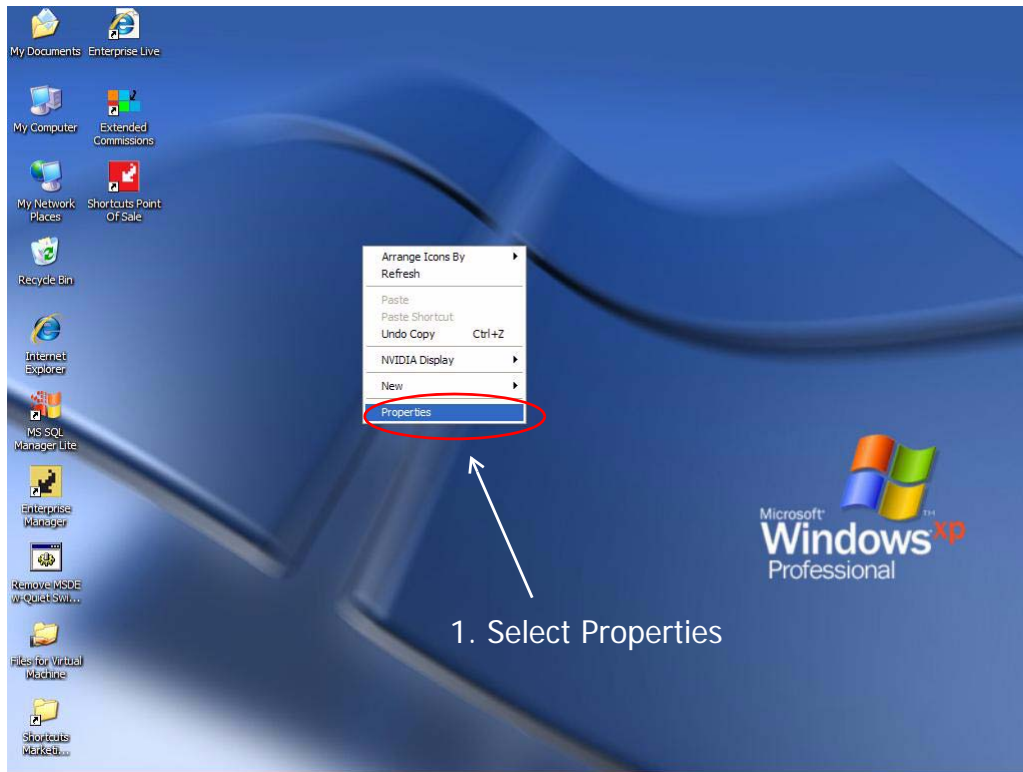
 ***Only continue if your computer(s) meet the all of the above requirements!***

Ensure your Computer is Running in Normal Sized Fonts

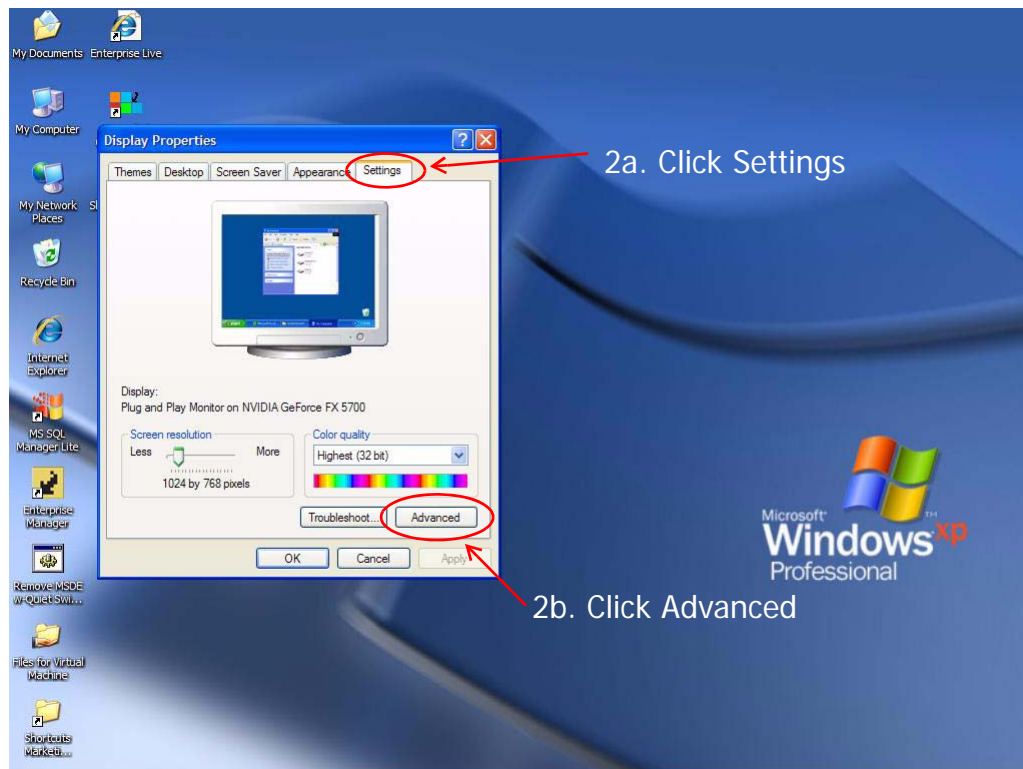
Shortcuts V7.3 is optimised to run in Normal sized fonts. If you have setup your PC to use a font size of Large or Custom, text may not be displayed properly when running Shortcuts V7.3.

To check whether your computer is using Normal sized fonts:

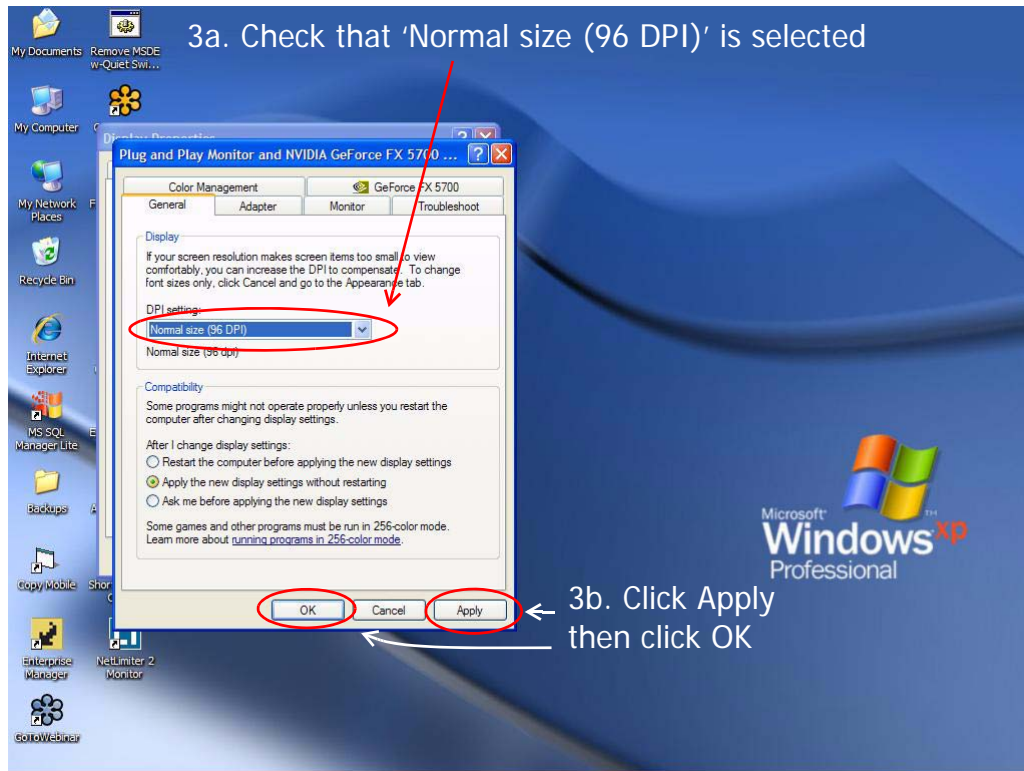
1. Right-click on the Desktop and select **Properties** from the pop-up menu that appears. The Display Properties window will appear.



2. Click on the **Settings** tab, and click on the **Advanced** button. Your monitor's properties window will appear.



3. Ensure the **Normal size (96 DPI)** option is selected from the Font Size drop-down list, then click the **Apply** button, followed by the **OK** button.

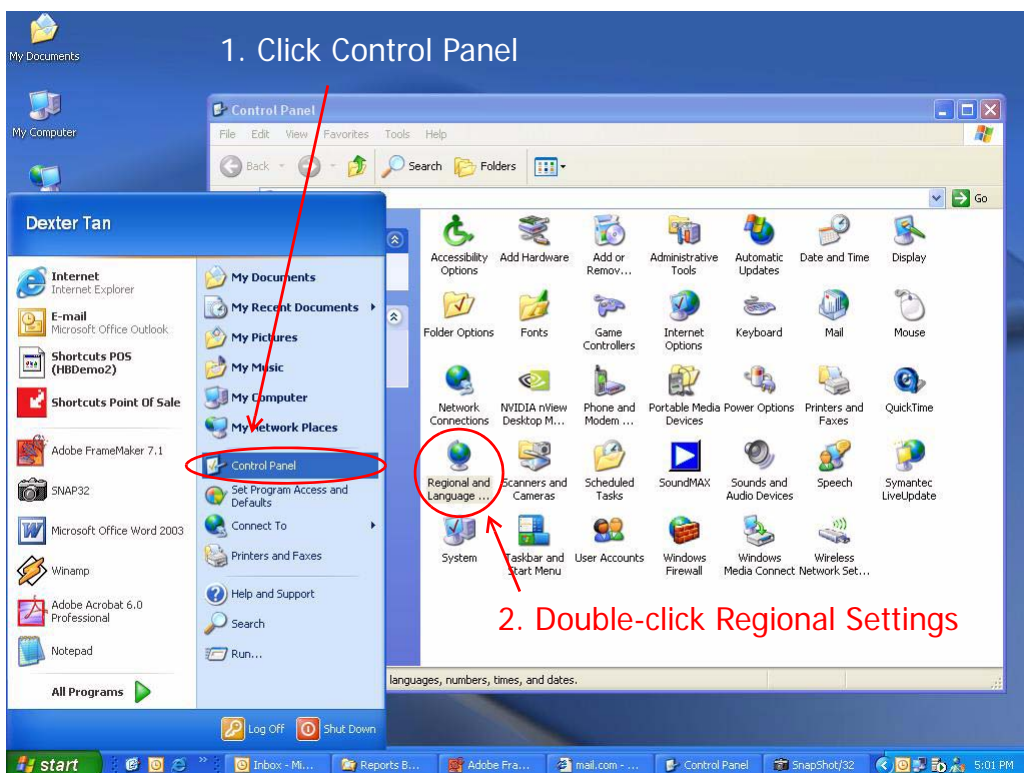


4. Close the Display Properties window by clicking on the 'X' button in the top right corner of the window.

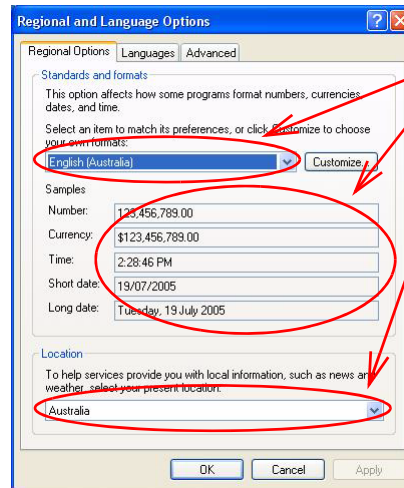
Ensure your Regional Settings are Correct

Shortcuts V7.3 draws on certain information provided by your computer about your region. If your region is not setup correctly, some functions of Shortcuts such as date and time may not work as expected. To ensure your Regional Settings are correct:

1. Click on the Windows **Start** button (or press Ctrl + Esc on your keyboard). Select **Control Panel** (or Settings -> Control Panel). The Control Panel window will appear.



-
2. Double-click on the **Regional Settings** icon (also called Regional and Language Settings in Windows XP). The Regional Settings window will appear.




3. Verify your details are correct

3. Ensure the details here are correct for your country, then click the **Apply** button, followed by the **OK** button.
4. Continue to click the **OK** button until you return to the Desktop.

Turn off any Virus Scanning Software

Some virus scanning software may interfere with your Shortcuts V7.3 installation/upgrade. Ensure any virus scanners have been switched off or disabled before attempting to install or upgrade your copy of Shortcuts. If your virus scanning software is setup to automatically load on start up, you will need to turn off this option temporarily. Refer to your respective virus scanner's user manual for how to turn off or disable your software.


 **Remember to turn on your virus scanning software again once you have finished installing Shortcuts!**

Are you installing on a Network?

If you are upgrading Shortcuts on a network, please read the "Networking and Database Connectivity in Shortcuts V7" document and follow all instructions contained within before proceeding with your upgrade. This document is located on your Shortcuts CD under "Installation Instructions".

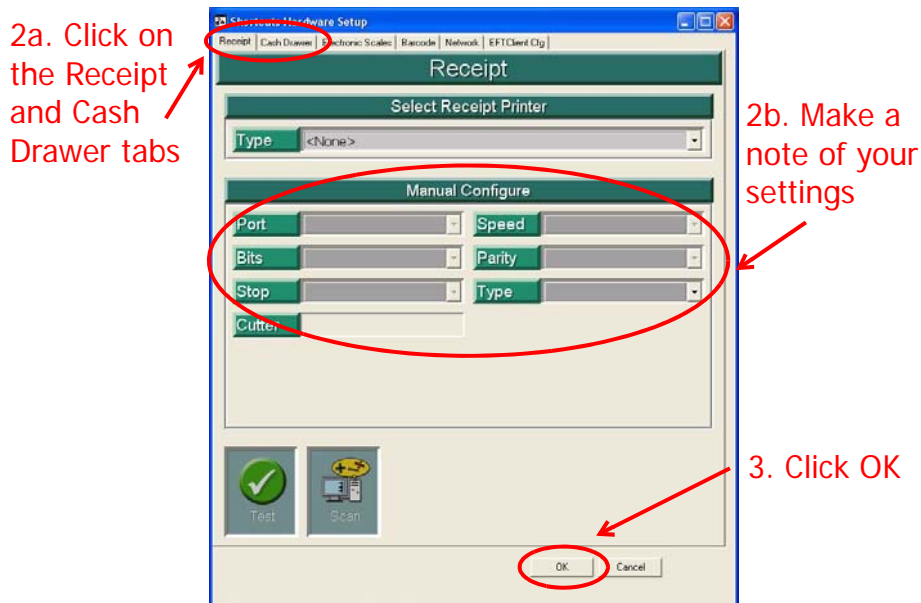
Upgrading from Shortcuts V7.1 or V7.2 to Shortcuts V7.3

This section will take you through the steps necessary to upgrade your copy of Shortcuts V7.1 or V7.2 to Shortcuts V7.3. You will need to run a Hardware session and back up your Shortcuts data as part of the procedure. This will ensure that your data will not be lost if the upgrade process fails at any point.

 *If you are running a network, all computers **MUST** be upgraded to Shortcuts V7.3 before you attempt to run the new software. The server/main computer must be upgraded first, followed by the client computers. Ensure that Shortcuts is not running on any other computer while you are upgrading a computer as this will cause problems. Note that you do not need to run a Hardware session, Backup, or obtain a license for client computers.*

Run a Hardware session

1. Run the Hardware utility (**Start Button** → **All Programs/Programs** → **Shortcuts Software** → **Point of Sale Hardware Utility**). The Hardware window will appear.




2. You will need to make a note of your Receipt and Cash Drawer settings in the event that you need to manually enter them afterwards. Click on the **Receipt/Cash Drawer** tabs, and note down the settings in the Manual Configure section.

3. Click **OK** to close the Hardware window.


Backup your Shortcuts data


Refer to your User Guide for instructions on how to perform a Backup. It is strongly recommended that you backup your data onto a USB key instead of other storage media.

 *The Shortcuts backup only backs up your Shortcuts database excluding Shortcuts Marketing Letters and any other documents in the computer. You will need to manually backup all your other documents etc. in each computer.*

Upgrading to Shortcuts V7.3

Now that you've made all necessary preparations, you're ready to upgrade to Shortcuts V7.3! **If you receive any errors during the installation procedure, please call the Shortcuts Helpdesk for assistance.**

 *It is strongly recommended that you proceed with the Shortcuts upgrade only during business hours (8.00am - 3.00pm EST, Monday to Friday) to ensure technicians are available in case you encounter problems during your upgrade. Once you have upgraded to Shortcuts V7.3, you will need to call the Shortcuts Helpdesk on 1300 66 73 74 to be re-authorized. Make sure that you have your Shortcuts V7.3 Serial Number on hand.*

 *If you are running a network, you **MUST** upgrade the server computer to Shortcuts V7.3 before upgrading the client computers.*

1. Close Shortcuts and any other programs that may be running on all computers.
2. Insert the Shortcuts V7.3 CD into your CD-ROM drive and wait a few seconds. The Install window will appear.

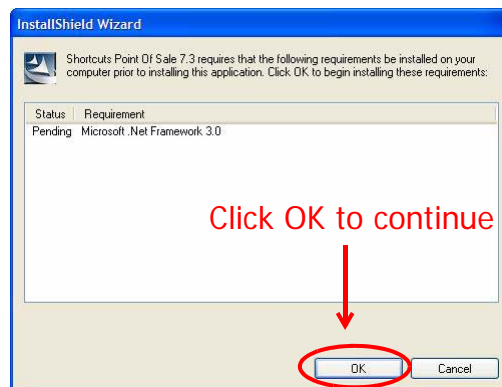
If the Install window does not appear, click Start (or press Ctrl & Esc on your keyboard), then select Run. The Run window will appear. In the Open dialog box, type 'D:\install.exe' (where 'D' is the letter assigned to your CD-ROM drive). Click OK. The Install window will appear.

3. Click on
Install Salon



3. Click **Install Shortcuts** to begin the installation.

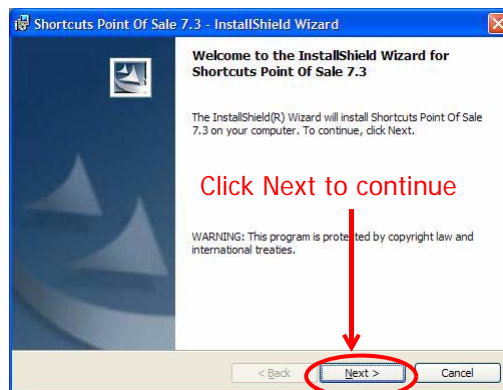
Your computer may require installation of several components to make it compatible with Shortcuts. If this is the case, an InstallShield Wizard window similar to the following will appear. Simply click **OK** to continue. A progress bar will be displayed at the bottom of the window. Please be patient as it may take a while for the components to be installed.



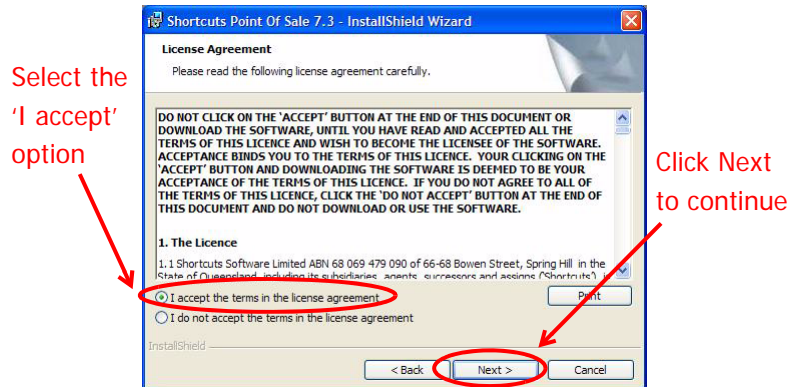
4. The Preparing to Install... window will appear as Shortcuts gathers all necessary information. Please be patient as this may take a minute or two.



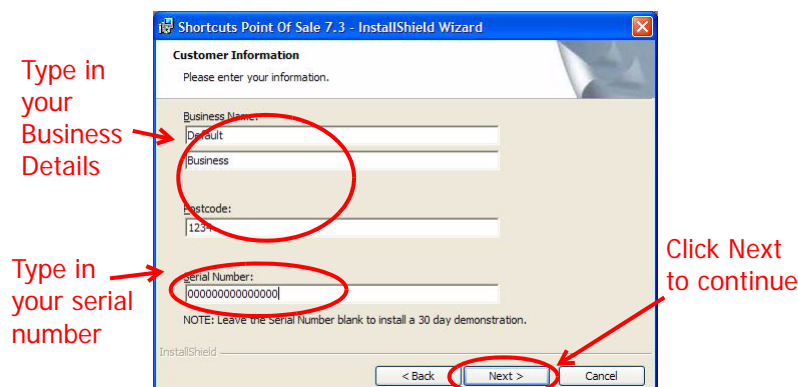
5. The Shortcuts Point of Sale InstallShield Wizard window will now appear. Read the instructions on screen.



6. When ready, click **Next** to continue. The License Agreement window will appear.

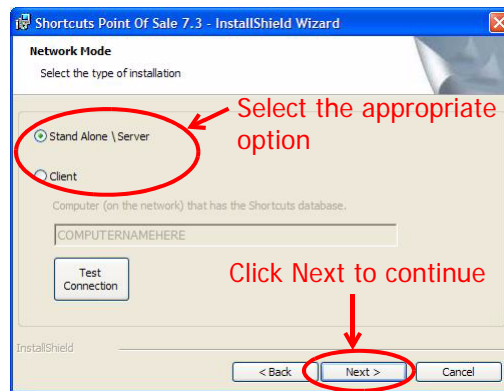


7. Please read the license agreement carefully. If you accept the terms in the agreement, then select the 'I accept...' option and click **Next** to continue. The Customer Information window will appear.



8. Type in your Business Details along with your Shortcuts V7.3 serial number. Your serial number is included in the letter you received along with your CD.

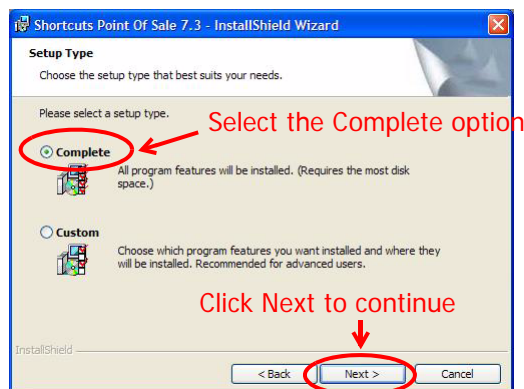
Once you have finished entering your details, click **Next** to continue. The Network Mode window will appear.



9. If you are upgrading to Shortcuts V7.3 on a stand alone machine, select the **Stand Alone/Server** option and click **Next** to continue. The Setup Type window will appear.

OR

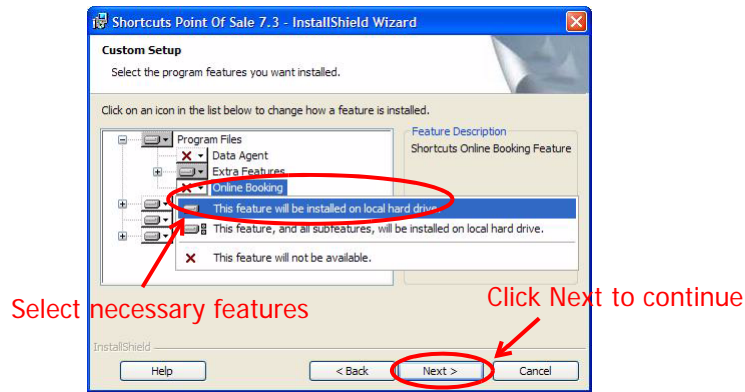
If you are upgrading to Shortcuts V7.3 on a network client machine, select the **Client** option and ensure that the correct computer name is typed into the **Computer** field. Click on the **Test Connection** button to verify the connection status, then click **Next** to continue. The Setup Type window will appear.



10. By default, the Complete option is selected and Shortcuts will be installed to C:/Program Files/Shortcuts Software/Point Of Sale/. It is recommended you leave the Complete option selected unless you wish to change the installation directory (which we do not recommend) or customise which features of Shortcuts are installed. If you are using the Complete option, go to Step 12.

If you have purchased the BookME feature, or wish to install the Payment Processor feature of Shortcuts, click to select the Custom option, then click **Next** to continue. The Custom Setup screen will appear. Go to Step 11.

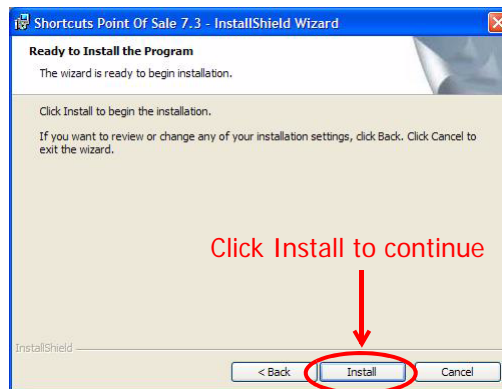
11. To install the BookME Agent, click to expand the **Program Files** tree, then click on the **Online Booking** option and select the **This feature will be installed on local hard drive** option.



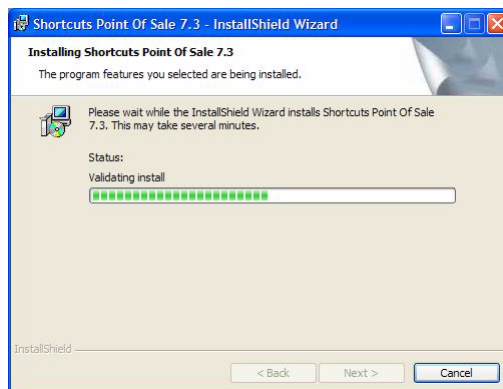
To install the Payment Processor feature, click to expand the **Program Files** and **Extra Features** trees, then click on the **Payment Server** option and select the **This feature will be installed on local hard drive** option.

 *If you are running Shortcuts on a network, the BookME Agent must be installed on the main Shortcuts Server computer.*

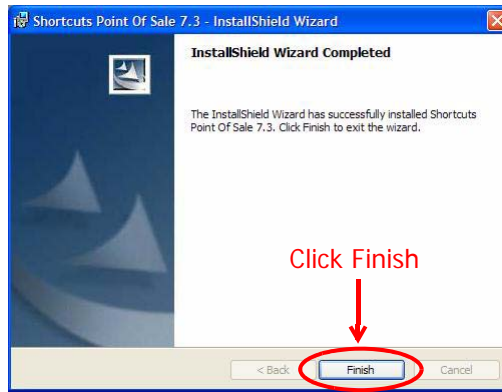
12. Click **Next** to continue. The Ready to Install the Program window will appear.





13. Click the **Install** button to begin the upgrade. A progress bar will then appear to indicate the current status of your installation. Please be patient as this may take a while.



-
14. Once the installation process is complete, the InstallShield Wizard Completed window will appear. Click the **Finish** button to close the window and return to the Windows Desktop.

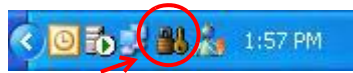


-  *If you are running Shortcuts on a network, you need to upgrade your client computers to the new version as well. To do this, simply follow the same procedure as you did for installing Shortcuts on the server. Pay particular attention to Step 9!*
-  *If you are experiencing problems with your receipt printer and cash drawer, you may need to run the Hardware program and re-enter the settings you took down in Step 2 on page 11. To access the Hardware program, simply click on the Hardware icon located in the Setup Menu of Shortcuts.*

15. Double-click on the **Shortcuts** icon on your Desktop to run Shortcuts.


Re-authorising your copy of Shortcuts V7.3

1. You will need to re-authorise the software as part of the upgrade process. On the Windows Task Bar, you will see the License Server.

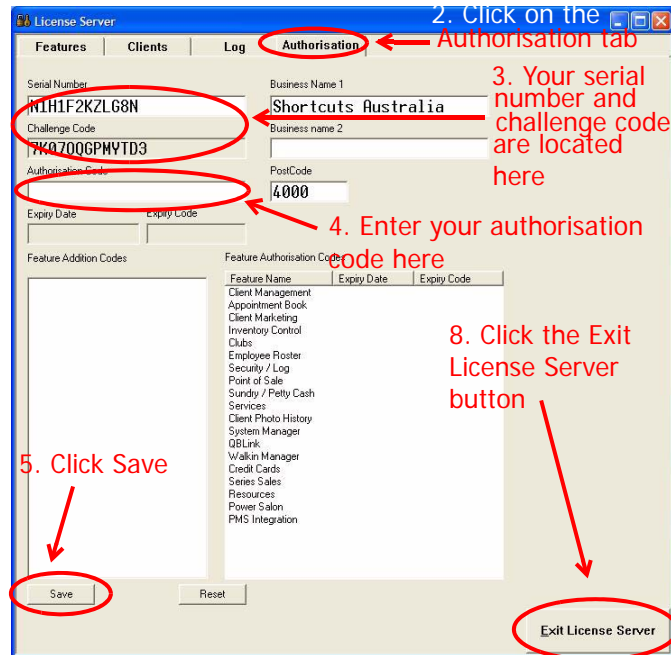


Click on the License Server

Click on the License Server icon. The License Server window will appear.

 *If you are running a network, the License Server will be located on the server/main computer. Note that only the server requires the authorisation code.*

2. Click on the **Authorisation** tab. Locate your serial number and challenge code.



3. Call the Shortcuts Helpdesk on 1300 66 73 74 to obtain your registration code. You will be required to quote the serial number and challenge code to the Helpdesk technician.
4. The Helpdesk technician will issue you with an Authorisation Code which you must enter correctly into the **Authorisation** field.
5. Once you have entered in the Authorisation Code, click the **Save** button. The Overwrite Existing License File window will appear.

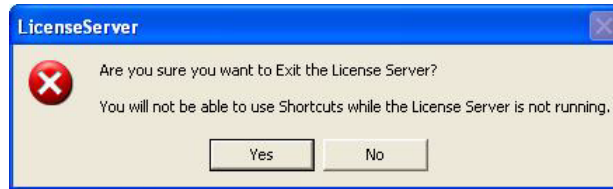


6. Click **Yes**. The License File Updated window will appear.



7. Click **OK** to return to the main License Server window.

-
8. Click on **Exit License Server** button. A window will appear asking you if you are sure you want to exit the license server.





9. Click the **Yes** button to exit the license server.
10. Finally, restart the license server (**Start Button** → **All Programs/Programs** → **Shortcuts Software** → **Point of Sale LicenseServer**).

Congratulations! You have successfully upgraded your computer to use Shortcuts V7.3. Remove the CD from your CD-ROM drive, place it back into the CD case and store it in a safe place. We also recommend viewing the What's New in 7.3 document on the CD (under the Documentation menu) so you can see what are the newest features of Shortcuts.

Backup your Shortcuts data

You must backup your data after authorising your copy of Shortcuts. If you are upgrading to Shortcuts V7.3 from Shortcuts V7.1 or earlier, note that Shortcuts V7.2 and V7.3 use a different backup procedure to earlier versions of Shortcuts. Refer to your What's New in 7.2 document for instructions on how to perform a Backup in Shortcuts V7.2 and higher. It is strongly recommended that you backup your data onto a USB key instead of other storage media.

 *If you are backing up more than once a day, you will need to change the file name by adding another number after the date. A good example might be adding the time of the backup after the date. Refer to your What's New document for more detailed instructions.*

 *The Shortcuts backup only backs up your Shortcuts database excluding Shortcuts Marketing Letters and any other documents in the computer. You will need to manually backup all your other documents etc. in each computer.*

Version History

Version Number	Description
1.0	First draft
1.1	Updated system requirements and some screenshots.
1.2	Updated system requirements, updated backup and license server chapters.
1.3	Updated for latest 7.3 Installation CDs.