Wellspring Software

Installation Notes

PrintBoss can be installed locally on a single workstation (*Local Install*) or it can be installed to a shared network folder where multiple workstations access the one application. Both mapped drive letter and UNC path will work to identify the location of the PrintBoss Directory. We recommend you install PrintBoss on a shared folder if there are multiple users so bank information, forms, and other information can be shared. After installing PrintBoss to the shared folder (*Network Install*), each additional workstation only needs the *Workstation Install* steps.

- ✓ **Unless the server will be used as a workstation, installation to the server folder can be performed from a workstation.**
- ✓ **All PrintBoss users will need FULL CONTROL of the PrintBoss directory. Simply having read and write permissions is not sufficient.**
- ✓ **If you have internet access, download the latest setup.exe from our web site. Use this setup program instead of the setup.exe file on the CD to ensure you are installing the most recent version of PrintBoss.**

    Citrix & Terminal Server installations are referenced in a separate Installation Notes.

The following pages contain tables with step by step installation instructions for the 3 basic install types – local, network, and workstation.

STEP 1	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
Start the PrintBoss installation	✓ **Log in as ADMINISTRATOR.** Insert the PrintBoss CD-ROM in the CD-ROM Drive. Run *X*:\setup.exe (where *X*: is the CD-ROM drive). Select the Accounting Package to be used with PrintBoss. If the Accounting Package is not in the list, choose *Custom*. Select the directory where PrintBoss is to be installed. PrintBoss will default to C:\PrntBoss. Select to install icons for the *Current User* or for *All Users* of this workstation. Click on *Next*.	✓ **Log in as ADMINISTRATOR.** Insert the PrintBoss CD-ROM in the CD-ROM Drive Run *X*:\setup.exe (where *X*: is the CD–ROM drive). Select the Accounting Package to be used with PrintBoss. If the Accounting Package is not in the list, choose *Custom*. Select the directory where PrintBoss is to be installed. PrintBoss will default to C:\PrntBoss. Change this to *X*:\PrntBoss (where *X* is the shared network drive). PrintBoss may use either drive mappings or the UNC path. Select to install icons for the *Current User* or for *All Users* of this workstation. Click on *Next*.	✓ **Log in as ADMINISTRATOR.** Run *X*:\PrntBoss\setup.exe (where *X* is the shared network drive). Select the Accounting Package to be used with PrintBoss. If the Accounting Package is not in the list, choose *Custom*. Select the directory *X*:\PrntBoss (where PrintBoss is already installed). Choose the *Workstation/ Printer Driver* option from the active radio dials. Select to install icons for the *Current User* or for *All Users* of this workstation. Click on *Next*.

STEP 2	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
Registration & Activation of the PrintBoss software.	Enter the Serial Number, Options, and Registration Code from the BLUE registration card that came with the software. Enter the Company Name, contact, and site that should become permanent within the PrintBoss software. Confirm the information and save the registration. ✓ **If the workstation has internet access, click on the *online activation* option.** If the workstation does not have internet access, choose to e-mail or fax the activation. PrintBoss will function for 30 days without activation (Evaluation Date).	Enter the Serial Number, Options, and Registration Code from the BLUE registration card that came with the software. Enter the Company Name, contact, and site that should become permanent within the PrintBoss software. Confirm the information and save the registration. ✓ **If the workstation has internet access, click on the *online activation* option.** If the workstation does not have internet access, choose to e-mail or fax the activation. PrintBoss will function for 30 days without activation (Evaluation Date).	This step is skipped. Already registered & activated.

STEP 3	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
Installation of components	PrintBoss will automatically select the components that are needed. Leave the defaults.	PrintBoss will automatically select the components that are needed. Leave the defaults.	This step is skipped. Already installed.

STEP 4	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
PrintBoss Settings Saved	PrintBoss will automatically select the registry that is needed. Typically, this is the Local and User Registry.	PrintBoss will automatically select the registry that is needed. Typically, this is the Local and User Registry.	PrintBoss will automatically select the registry that is needed. Typically, this is the Local and User Registry.

STEP 5	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
View Notes	Click on the VIEW NOTES button. ✓ **PRINT OUT THESE NOTES.** They will guide you through steps specific for the accounting package.	Click on the VIEW NOTES button. ✓ **PRINT OUT THESE NOTES.** They will guide you through steps specific for the accounting package.	This step is skipped. Already viewed and printed.

STEP 6	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
Special Install Steps	If the SPECIAL INSTALL STEPS button is active, click on it. Follow the instructions per the NOTES just printed that are specific for the accounting package.	If the SPECIAL INSTALL STEPS button is active, click on it. Follow the instructions per the NOTES just printed that are specific for the accounting package.	If the **HAS** program is installed locally, then this step may be necessary.

STEP 7	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
Install the PrintBoss printer driver	Select to install the *PrintBoss NT40* or *PrintBoss 50* printer driver. The installation will automatically select the best choice for this workstation. Click on Finish. Restart the workstation. For more information about the differences between the PrintBoss NT40 and PrintBoss 50 drivers, please see the support documents on our web site.	Select to install the *PrintBoss NT40* or *PrintBoss 50* printer driver. The installation will automatically select the best choice for this workstation. Click on Finish. Restart the workstation. For more information about the differences between the PrintBoss NT40 and PrintBoss 50 drivers, please see the support documents on our web site	Select to install the *PrintBoss NT40* or *PrintBoss 50* printer driver. The installation will automatically select the best choice for this workstation. Click on Finish. Restart the workstation. For more information about the differences between the PrintBoss NT40 and PrintBoss 50 drivers, please see the support documents on our web site

STEP 8	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
Setup PrintBoss for the Accounting Software	Follow the *Installation Notes* to setup PrintBoss specifically for the Accounting Software.	Follow the *Installation Notes* to setup PrintBoss specifically for the Accounting Software.	This step is skipped. Already installed.

STEP 9	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
Setup Accounting Software for PrintBoss	Follow the *Installation Notes* to setup the Accounting Software to interface with PrintBoss.	Follow the *Installation Notes* to setup the Accounting Software to interface with PrintBoss.	Follow the *Installation Notes* to setup the Accounting Software to interface with PrintBoss.

STEP 10	**LOCAL INSTALL**	**NETWORK INSTALL**	**WORKSTATION INSTALL**
Check for PrintBoss updates online.	If the workstation has internet access, check for updates. Start the PrintBoss program (PB32 Program). Select HELP / ABOUT. Click on the button to ***CHECK FOR PRINTBOSS UPDATES ONLINE***. RUN the update. This update is accessible on the day PrintBoss is FIRST installed or if there is a current service contract.	If the workstation has internet access, check for updates. Start the PrintBoss program (PB32 Program). Select HELP / ABOUT. Click on the button to ***CHECK FOR PRINTBOSS UPDATES ONLINE***. RUN the update. This update is accessible on the day PrintBoss is FIRST installed or if there is a current service contract.	This step is skipped. Already installed.

✓   **Save the BLUE PrintBoss registration card in a safe place for backup purposes.**