InsurancePro™
The Agency Management Software

Installation Guide

Welcome to InsurancePro, the Agency Management Software! Thank you for your recent purchase of InsurancePro. Developed by individuals with quality experience in the insurance industry, InsurancePro will fully automate the day-to-day functions in your agency and allow you and your staff to concentrate on what you do best, sell insurance.
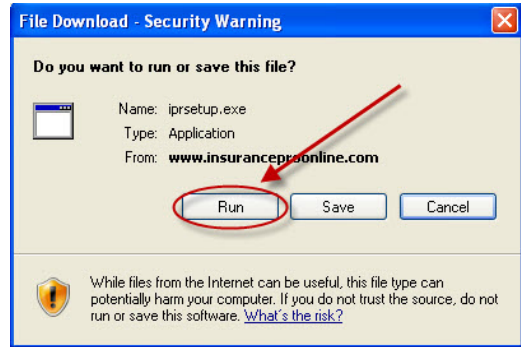
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Installation

Download. To install Insurance Pro, download the program from:

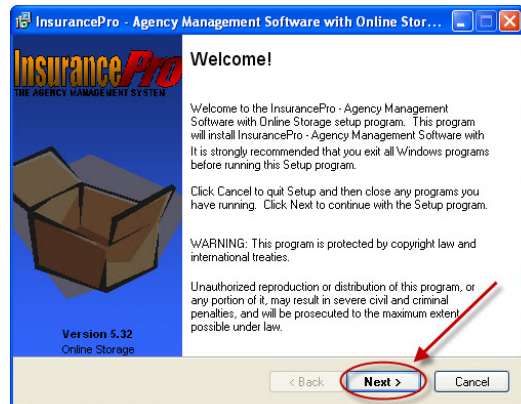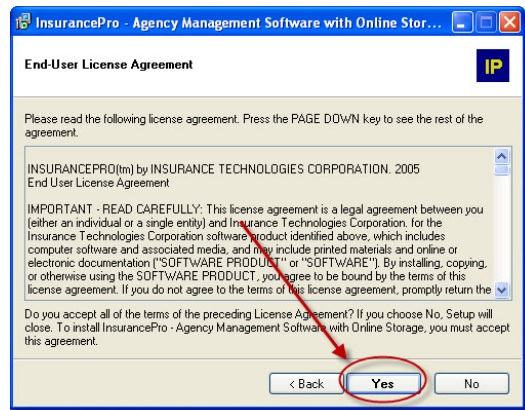http://www.insuranceproonline.com/downloads/ip/iprsetup.exe

Security Warning. If prompted with a Security Warning, just select "Run" to continue.

**Install.** Select "Next" on the Welcome screen.

End-User License Agreement. Select "Yes" after reviewing the End-User License Agreement.

Select Destination Directory. We highly recommend leaving the directory to the default path of C:\InsurancePro Remote.
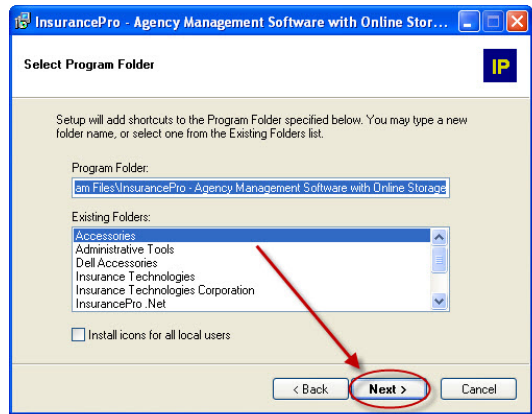
If you choose to install InsurancePro in a directory other than the default, be sure to install all future upgrades to the same directory.

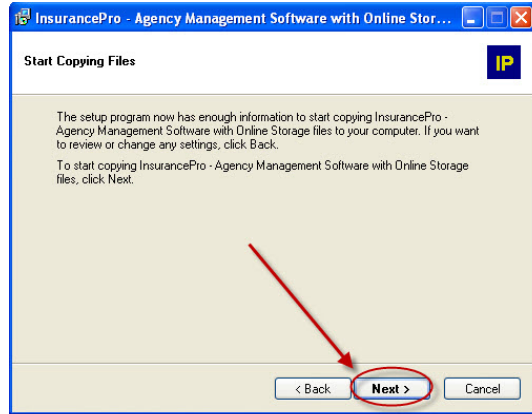Select "Next" on this screen to continue.
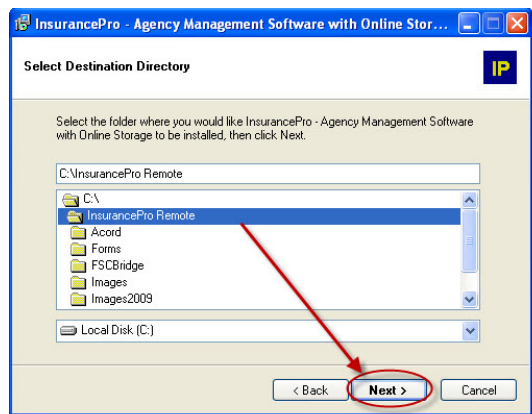
Select Program Folder. We recommend leaving the Program Folder to the default of "C:\Program Files\InsurancePro - Agency Management Software with Online Storage".
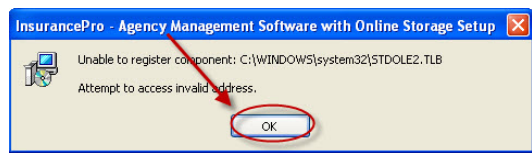
Select "Next" on this screen to continue.

Start Copying Files. Select "Next" to start copying the necessary files to your computer.
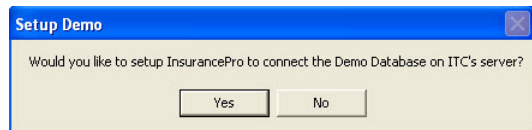
Unable to register component. Select "OK" if you receive this prompt.

Setup Demo.

1st Time Users: Click "Yes" to pre-fill the Remote Database and FTP Site Information to connect to the demo database. After training, a database will be created specifically for your agency.

Current Users installing to a new computer: Click on "No".

InsurancePro Remote Connection Setup.

1st Time Users: Leave these settings as they are defaulted. This will connect you to the demo database. After training, a database will be created specifically for your agency.

Click "Test" to verify your computer is able to communicate with our servers.

Current Users installing to a new computer: Contact our support department at (800) 383-3482 x4 to obtain your **Remote Database Information** and **FTP Site Information**. Once you have entered that information, click "Test" to verify your computer is able to communicate with our servers.
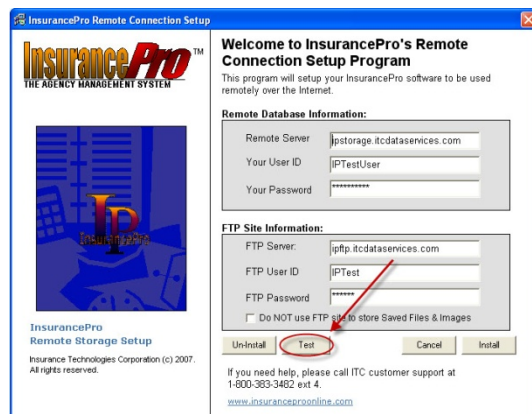
Continue Testing. Initially when prompted, select "Yes" to continue the test process.

Continue Testing
InsurancePro setup will automatically update the settings before testing.
Do you want to continue?
Yes   No
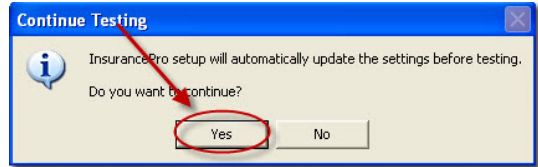
Connected Successfully. You should receive a message "Connected Successfully" in the InsurancePro Remote Connection Setup screen.

If you are unable to successfully connect, contact our Support Department at (800) 383-3482 option 4.
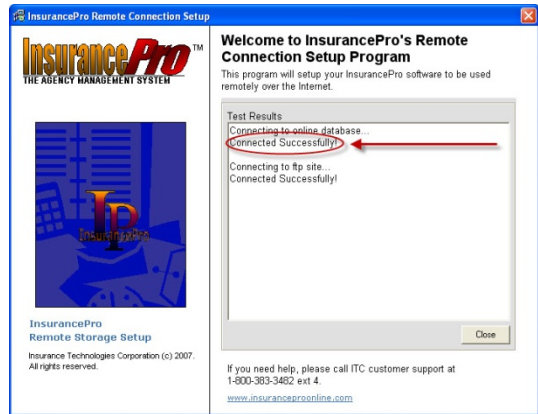
Continue Testing. If you receive a prompt to continue testing after you have connected successfully, select "No".

Continue Testing
InsurancePro setup will automatically update the settings before testing.
Do you want to continue?
Yes   No
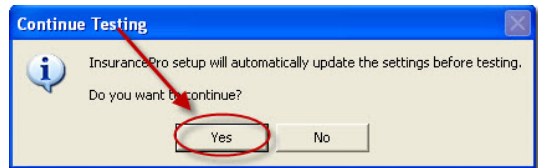
Close the InsurancePro Remote Connection Setup Window. Select "Close".

Click on Update. To apply the settings, click on "Update" on the InsurancePro Remote Connection Setup window.

Setup Finished.

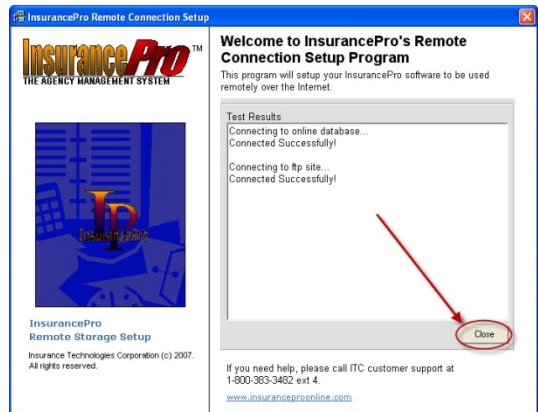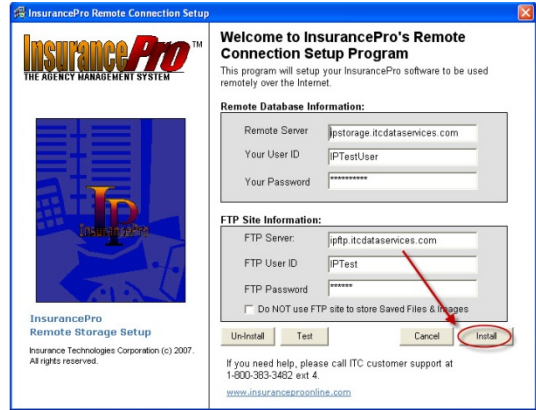**1st Time Users:** Click on "Finish" to complete the installation. Prior to your agency database being created, you will attend a live training session. In the meantime though, we encourage you to take a few moments and familiarize yourself with InsurancePro by accessing the demo database. Simply click on the InsurancePro icon on your desktop and select "Demo Database".
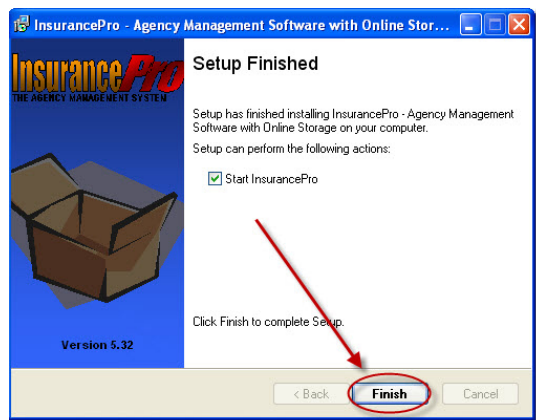
Current Users installing to a new computer:

Current Users MUST run a relink process PRIOR to accessing the database.

Uncheck "Start InsurancePro" and click on finish.

Relink Process. Click on Start > All Programs > InsurancePro Online Storage>Relink Tables
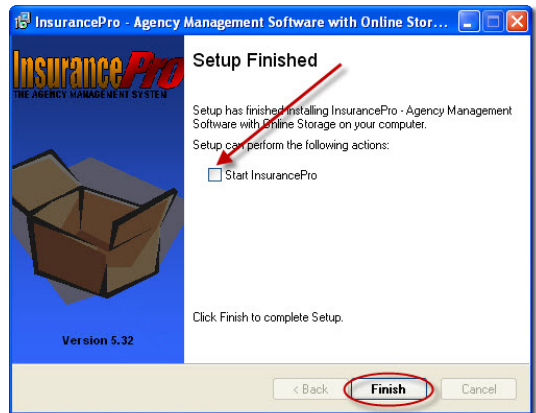
Current Users instructions continued.

Click on Relink.

Current Users instructions continued.

Complete. Click "OK".

Current Users instructions continued.

Click Exit and the installation process for InsurancePro is complete.

Additional Steps for a Network Installation

Network Installation

Essentially, there is no benefit to installing and running InsurancePro through a local network. Rather, we recommend you run the program independently on each computer. With the Online Storage feature, your client files are hosted on ITC's servers; therefore, you will be accessing and 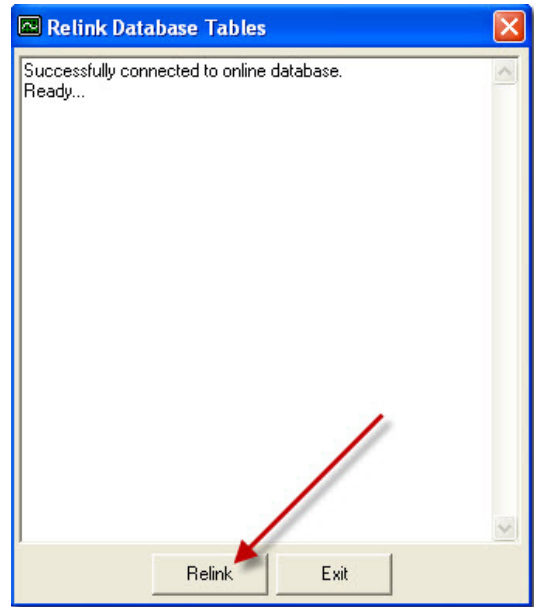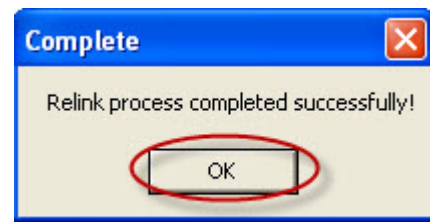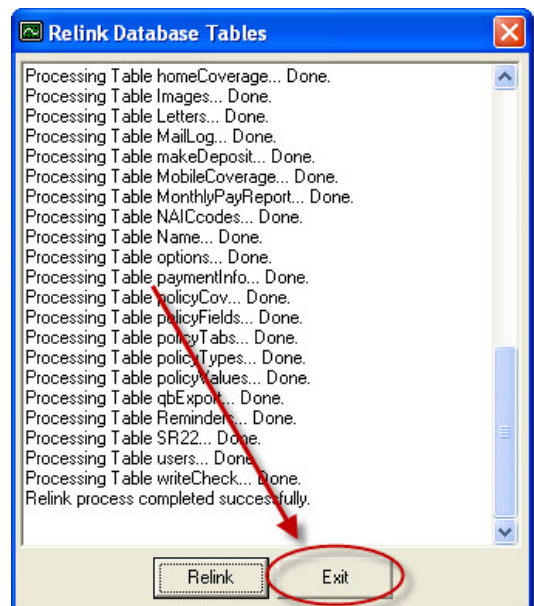sharing the same client information database from each of your computers, even without InsurancePro being networked within your agency. It is not necessary to install a copy of InsurancePro on your server to be able to share your client database. However, if you still desire to complete a network installation, follow the steps listed below.

Install InsurancePro on every computer. It is necessary to install InsurancePro on each workstation, even if the software is intended to be run on a network. Certain files must reside on each workstation's local C: drive in order for InsurancePro to run properly. Those files are copied to each individual workstation during the installation process.

Follow the directions starting on page 2 to install InsurancePro on each workstation as well as the server. After InsurancePro has been installed on all computers, continue with the directions on page 7.
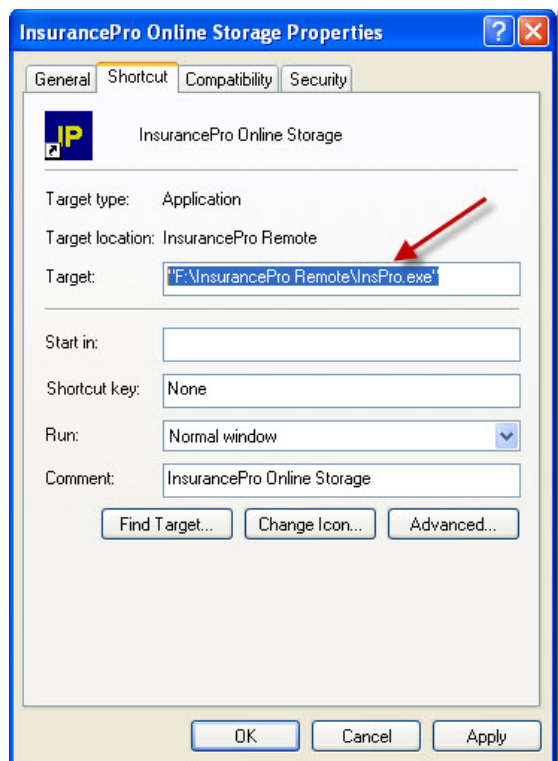

Edit Shortcut on each Workstation. After the installation process is completed on each computer (including the server), edit the shortcut path on each workstation to point to the server. This can be done by right-clicking on the InsurancePro icon located on each workstations' desktop and selecting "Properties" from the menu.
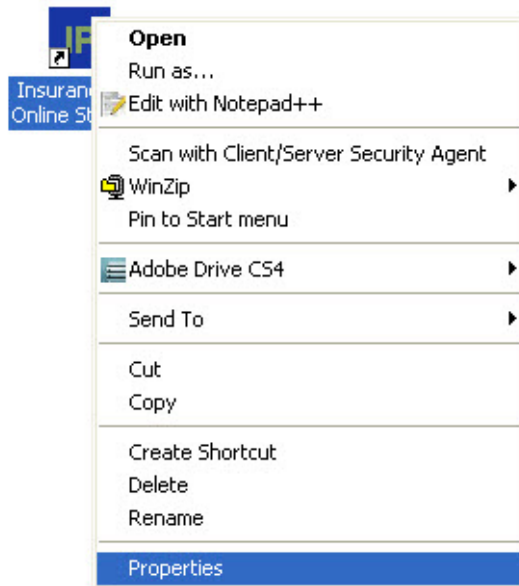
Change the drive letter to the drive letter associated to your server. In the box labeled "Target", change the drive letter from C:\ to the drive letter that is assigned to your server. For example, if your server is assigned drive letter F:\, change the Target to read **F:\InsurancePro\InsPro.exe.**

This step needs to be completed on every workstation.

InsurancePro Online Storage Properties

General | Shortcut | Compatibility | Security

IP   InsurancePro Online Storage

Target type: Application

Target location: InsurancePro Remote

Target: "F:\InsurancePro Remote\InsPro.exe"

Start in:

Shortcut key: None

Run: Normal window

Comment: InsurancePro Online Storage

Find Target... | Change Icon... | Advanced...

OK | Cancel | Apply

Setup Complete. This completes the network installation process.

Appendix A: Minimum System Requirements

Hardware Specifications	Required	Recommended
Processor	500MHz CPU	1Ghz CPU or higher
RAM	512MB	1GB or Higher
Disk Space	100MB	250MB or More
Scanner	Twain Compatible*	With ADF
Printer	Inkjet or Laser*	Laser

*Required for certain features only.
Not required to run InsurancePro

Operating System	Supported	Recommended
Local Version 5.22 and earlier	Windows XP*, Windows Vista	Windows XP Professional SP2
Online Version 5.22 and earlier	Windows XP*, Windows Vista	Windows XP Professional SP2

*Service Pack 2 is required
** .Net 2.0 Framework & SP2 are required

Internet	Supported	Recommended
Local Version	Dial up (56Kbps) or higher*	DSL with at least 128Kbps
Online Version	DSL (320Kbps) or higher	Cable or FIOS with at least 768Kbps

* Internet connection is not required

Appendix B: Troubleshooting

**Q:**   *When I click on the InsurancePro icon, I get an access violation error. I am using Windows Vista.*

A1:   1) Right click on your InsurancePro icon, and select **Properties.**
2) Go to the **Compatibility** tab.
3) Click in the box next to **Run this program as an administrator.**
4) Click on **Apply** and then **OK** to close the screen.
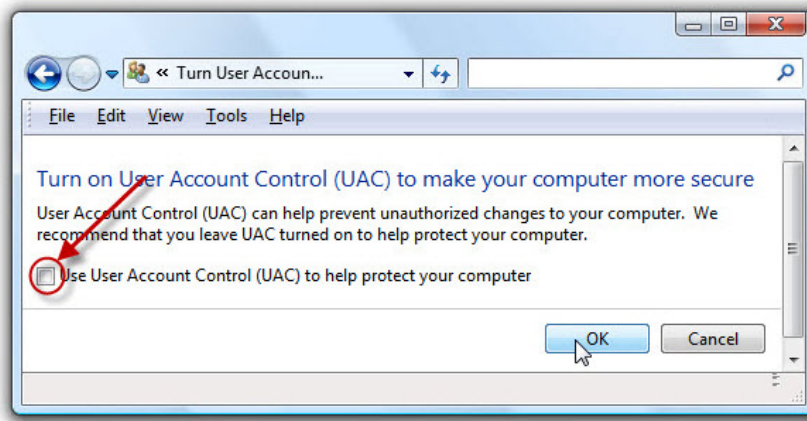
If you still experience problems:

1) Click on **Start.**
2) Click **Control Panel.**
3) Type "**UAC**" into the search box.

4) Click on "**Turn User Account Control (UAC) on or off**"
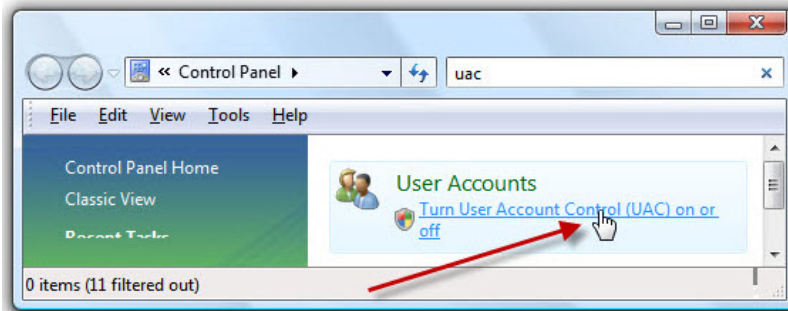
5) Uncheck the box labeled **Use User Account Control (UAC) to….** and then select **OK**.

6) You will be required to reboot your computer before the changes will take effect.

Q: *What permissions do I need to install Insurance Pro?*

A: You will need Administrative rights to the local machine to install InsurancePro.

Q: *I've installed InsurancePro, but am only able to access a demo database. What do I need to do to get access to a blank database?*

A: Prior to your agency database being created, you will attend a live training session. In the meantime though, we encourage you take a few moments and familiarize yourself with InsurancePro by accessing the demo database and/or viewing our Additional Training Materials (see page 10).

Q: *I received an error "Unable to register component: ….." during the installation process. What should I do?*

A: Just click OK. This will not impede the installation process in any way nor affect the program from functioning properly.

Q: *I received an SQL Server Login prompt asking for a Login ID and Password.*

A: Your database needs to be relinked. To run the relink process, click on Start > All Programs > InsurancePro Online Storage>Relink Tables. Then click on the "Relink" button in the *Relink Database Tables* window. When the process is complete, click "OK" to the *Relink Process Completed Successfully!* prompt. Then click on Exit.

Additional Troubleshooting information can be found by visiting our Online Knowledgebase at
http://www.itcdataservices.com/support/IPFAQ/afmmain.aspx

Additional Training Materials

Online training videos - http://support.turborater.com/IPVideos.asp

Online Help file - http://support.turborater.com/IPHelp/IPhelp.htm

Online Knowledgebase - http://www.itcdataservices.com/support/IPFAQ/afmmain.aspx

Companies Certified to Download with InsurancePro - http://support.turborater.com/download.asp

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