

2004 Software Installation Instructions:

1042-S Pro

1099 Pro

W2 PRO

THIS SOFTWARE MAY BE INSTALLED AS EITHER:

- A no obligation, fully functional DEMO that prints sample forms only (one form of sample data will print at a time)
- A fully installable, licensed version after you obtain your Activation Code

NOTE: If you have already purchased your software, you will find your activation code at the bottom of your paid invoice or packing slip.

This installation also includes the following:

- 1099 Pro 2004 Help Manual (PDF Format)* -- Also available within the software by pressing the <F1> key
- 2004 IRS General Instructions for Forms 1099, 1098, 5498 & W-2G (PDF Format)*
- 2004 IRS Specific Instructions for Forms W-2G, 1098, 1098-E, 1098-T, 1099-A, 1099-B, 1099-C, 1099-CAP, 1099-Div, 1099-G, 1099-H, 1099-Int, 1099-OID, 1099-LTC, 1099-Misc, 1099-SA, 5498-SA, 1099-PATR, 1099-Q, 1099-R, 1099-S, 5498, and 5498-ESA (PDF Format)*
- Pub 1586, Reasonable Cause Regulations and Requirements for Missing and Incorrect Name/TIN (PDF Format)*
- DEMOS of all 2004 1099 Pro, Inc. Products

***Adobe Acrobat Reader is required to view these publications. Download Acrobat Reader for FREE at:** <http://www.adobe.com/prodindex/acrobat/readstep.html>

SINGLE USER INSTALL

FOLLOW THE STEP-BY-STEP INSTRUCTIONS BELOW:

1. Close all programs. **We also recommend disabling any virus checkers.**
2. Insert the installation CD-ROM into your CD-ROM drive. (If the menu does not appear, click on the Start button and choose Run and type D:\Setup.exe).
3. The Wise Installation Wizard will prompt you through the installation routine.
4. When prompted, enter your activation code which begins with the letter "M." If you do not have an Activation Code, then type in the word "**DEMO**".
5. **ROLL FORWARD OPTION:** You will be prompted to copy your Filer, Recipient, Security and Transmitter information from your 2003 software. Make the appropriate selections and click NEXT.
6. If you selected the Roll Forward Option in Step 5, your Tax Year 2003 filers may be selected at the Select Filer Screen. Tax year 2003 recipients may be browsed when you are in the Tin field of any blank form. When adding a new record press the F2 Key or right click your mouse to view your recipients.

MULTI USER INSTALL

FOLLOW THE STEP-BY-STEP INSTRUCTIONS BELOW:

For Multi-user installations, all 1099 Pro® software requires that one machine is designated as a server and all others as workstations. The server may be any Windows® machine on the network or having a local or remote drive accessible by all computers that will function as workstations.

To perform server installation:

1. Determine a network computer, drive and folder in which to install your software. All workstations must have read and write access to this folder.
2. Install your software on the network computer to be designated as the server. Enter your multi-user Registration code as prompted. Select **Server Installation** as the Install Type. Allow the program files to reside on the local or remote drive.
3. Upon successfully installing your software to the network, click on the 1099/W2/1042S Pro® icon on your desktop. The Welcome Wizard will walk you through setting up the software. By default Audit Trails and Security are enabled.* Complete the Welcome Wizard and then re-launch your software. Administrators use "**Administrator**" and "**New**" to logon for the first time with security enabled. The Administrator should create users and assign rights prior to installing 1099/W2/1042S Pro® on workstations.

**You are encouraged to enable Security. If security is disabled ANY USER on ANY WORKSTATION can access your software and View/Modify Administrator settings and all data. This includes the potential for ANYONE to create himself as Administrator and lock you out of the software.*

To perform workstation installation:

1. Complete server installation prior to installing workstation(s). Locate the server installation drive and folder from the workstation. To map the server installation's network drive from a workstation open Windows Explorer from each workstation. Locate the network drive, right click your mouse and select Map Network Drive. Each installation will refer to this drive as the Global Data Path.
2. Install 1099 Pro® on the workstation. Enter your multi-user Registration code as prompted. Select Workstation Installation as the Install Type. Browse for the network drive and folder of the server installation (e.g., X:\Program Files\Pro99T04\ where "X" is mapped Network Drive). Allow the program files to reside on the local drive (e.g., C:\Program files\Pro99T04).
3. If the Administrator enabled security, the workstation is deemed a "user." Upon first entering your software at the workstation a User ID (as assigned by the Administrator) is required. For the Password enter "**New**." The User is then required to create a unique password.

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