

Version 10.4.30x**September 2010****Single-User Installation Instructions**

If a previous version of the program is already installed, please refer to the “Updating a Previous Version of CANTAX FormMaster Program” section on page 2.

To install the CANTAX *FormMaster* program, you must have Administrator rights.

Downloading from the Internet

To download the program from the Internet, proceed as follows:

1. On the CANTAX Downloads Web page, login under the “Member Identification” section.
2. On the Files Centre Web page, select the product you want to download.
3. Read and agree to the terms of the License Agreement by clicking **Accept**.
4. In the “Downloading the Program” section, click the “.exe” link to download the program.
5. Click **Save** in the dialog box to save the file to your computer. Note that the location where the file is saved does not affect the installation program. The time required to download the file will depend on the speed of your modem and the speed of your Internet connection. Also, note where the file has been saved, as this will make it much easier to locate after downloading.
6. Once the download is completed, open the folder in which you saved the file.
7. Double-click the downloaded setup file.
8. When prompted for the version selection, select **Install a local version**.
9. Follow the instructions for the remainder of the installation.

Installing from the CD-ROM

1. Insert the CANTAX Tax Tools CD-ROM in your CD drive.
2. The installation program should start automatically. If not, select **Start**, click **Run**, then browse to the CD-ROM and run “Setup.exe.”

3. Follow the on-screen instructions, choosing the appropriate program to install.
4. When prompted for the version selection, select **Install a local version**.
5. Follow the instructions for the remainder of the installation.

The CANTAX *FormMaster* program will be installed in **Program Files/CANTAX/FormMaster 2010** folder.

Note: Each user will have their own preferences and may choose to share templates and returns if stored in a common location.

Activation Key

CANTAX *FormMaster* requires an activation key. During the installation, enter the applicable activation key when prompted. It can be found on the letter included with your package.

If you downloaded the program from our Web site, the activation key is available in the **Activation Key** section on the download service page of the product. Please keep it for future reference.

Note: CANTAX *FormMaster* evaluation version does not require an activation key.

Network Installation Instructions

If a previous version of the program is already installed, please refer to the “Updating a Previous Version of CANTAX *FormMaster* Program” section on page 2.

Deploying the program on a server

To deploy the CANTAX *FormMaster* program, you must have Administrator rights.

1. Log on at any workstation.
2. Insert the CANTAX CD-ROM in the CD drive.

3. The installation program should start automatically. If not, select **Start**, click **Run**, then browse to the CD-ROM and run “setup.exe.”
4. If you have downloaded the setup file, run the installation program.
5. Select the appropriate program you want to install (CD-ROM installation only).
6. When prompted for the version selection, select **Deploy a network version on a server**.
7. Select the destination folder to which the program is to be deployed and click **Next**. This folder must be read-write accessible to all users.
8. Follow the instructions for the remainder of the deployment.

Installing *FormMaster* on each Workstation

Ensure that the user workstation is connected to the server and that it is accessible as a mapped networked drive. The mapped network drive must use the same drive letter and volume name used during server deployment (e.g.: drive H).

From the user workstation, double-click the **2010 FormMaster.Ink** file located on the root of the folder where the program was deployed. This will install components such as Tax Fonts, shortcuts and other necessary files for the correct operation of the program on the workstation.

Updating a Previous Version of *FormMaster*

To update the version, proceed as follows:

Local Installation Version Update

1. Run the program.
2. When prompted for the version selection, select **Update local installation** (this option should be selected by default) and click **Next**.
3. Click **Update** in the **Welcome** box displayed on screen. The Installation process will automatically update your program to the current version.

Network Version Update

Step 1 - Server Update

1. Ensure that there are no users (apart from the administrator) connected to the program.
2. Run the program.
3. When prompted for the version selection, select **Server Update** (this option should be selected by default) and click **Next**.
4. Select the network location containing the program that must be updated.
5. Follow the instructions for the remainder of the update.
The installation process will automatically update the program on the server to the current version.

Note: It is very important that there are no users connected to the program during the update procedure.

Step 2 - Update of client workstations

1. Double-click the *FormMaster* program shortcut on your desktop or select the program from the CANTAX program group located under **Start/Programs/CANTAX/**.
2. Click **Yes** in the **Update** message box.

The files required to use the program are installed on the workstation following the update.

To Run *FormMaster*

To run the program, double-click the *FormMaster* program shortcut on your desktop or select the program from the CANTAX program group located under **Start/Programs/CANTAX/**.

Note: In order to run the **CCH Instant Update** feature to update your program files, you must have Administrator rights.

Release Notes

The *Release Notes* are accessible from the **Welcome** box in the program.

System Requirements

To correctly execute the *FormMaster* program, you must have the following:

Processor

Pentium IV or better (Dual Core processor is recommended)

Operating systems

- Windows 2000 SP4, XP SP3
- Windows Vista SP1 32-bit and 64-bit versions (except for Starter Edition)
- Windows 7 32-bit and 64-bit versions (except for Starter Edition)**
- Windows Server 2000 SP4, Windows Server 2003 SP2 32-bit and 64-bit versions (including R2), Windows 2008 Server 32-bit and 64-bit versions
- Network File System - NTFS, FAT32, Novell 6.5

Notes:

Microsoft® will end technical support and updates for Windows 2000 Server operating system in 2010. Consequently, *FormMaster* will discontinue support of this version of Windows at the time version 1.0 - 2011 is scheduled to be released, i.e. December 2010.

** To know more about the different Windows 7 Editions and their respective requirements, consult the Microsoft Web site (www.microsoft.com) using the keywords “Windows 7” and “Windows 7 System Requirements” to speed up your search.

RAM Minimum

1 GB of RAM (2 GB or higher is recommended)

Notes:

RAM requirements are highly dependent on the operating system used.

Please refer to documentation provided with your operating system for minimum and recommended RAM requirements.

Hard drive disk space

The installation requires a maximum of 75 MB of free disk space on the drive where Windows is installed (by default this drive is C:\) in order to copy temporary files, plus a maximum of 75 MB of free disk space on the drive where the application will be installed.

Monitor

SVGA 800x600 monitor (1024x768 recommended), 65,000 colours

Printer

Laser printer with a minimum of 4 MB of memory (16 MB is recommended) or inkjet printer

CD Drive

A CD drive is required to install the software. (The CD drive is not required if the program is either installed or run from another networked computer or file server, or downloaded from the Internet.)

Adobe Reader™

Version 9.0

Internet connection

Internet Explorer 5.5, 6, 7 or 8.0 with 128-bit security encryption is required to transmit electronically.

An Internet connection is required to use electronic services available with *FormMaster* such as,

- **CCH Instant Update** feature
- MMF transmission *
- Accessing links provided within the *FormMaster Professional Centre and Help*

*** MMF**

3.5 diskettes (for federal only) or CD/DVD media can also be used to transmit MMF

These are the minimum system requirements needed to run the program. For optimal performance, we recommend you run the program with better than the minimum requirements.