

Application Setup

How To Upgrade

All Phase25 Software products are built on the latest Microsoft technology and will install and run on any **Windows 10 or 11** system that meets the [basic system requirements](#). **NOTE: Phase25 Software products do not install or run on Macintosh (macOS) systems.**

To Upgrade: You can download any newer version of your application as long as the first two numbers match your licensed version. For example, if you have Version **8.01.9158**, you can uninstall it, download version **8.01.9243** or later (look at the last four numbers) and install it without purchasing another license.

Downloading & Installing an Application

All Phase25 software products are available via download from our website. NOTE: If you have a previous release of Version 8, see the next page for instructions on how to uninstall it before installing a newer release.

This guide demonstrates these steps using basicAppraisals; however, they apply to all Phase25 Software applications.

Go to <https://phase25.com> and click on the Product Catalog link at the top of the page.

Choose which product to download (click on the icon)

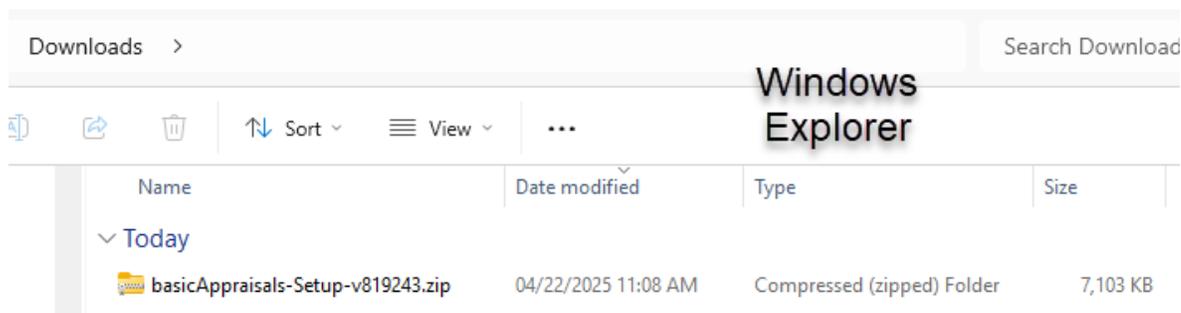
Scroll down the application support page to a link for the latest version, which will include the version number (v8.01.xxxx) and the size of the download (7.0MB). Example:

[basicAppraisals Jewelry & Collectibles System v8.01.9243\(7.0MB\)](#)

Click on the link to begin the download, which will put the zipped installer into your Downloads folder.

Open Windows Explorer, and browse to your Downloads folder. You should see it in the list of folders in This PC section on the left side of the window, or you can start at the Windows C:\ folder and follow this path:

<C:\Users\<your name>\Downloads>



NOTE that the downloaded file is zipped (**compressed**). It will have the “zip” icon you see above and the version number of the application.

Copy or move this file to your Desktop.

Right-click on the file and choose Extract All.

Keep the default destination when prompted, which will be a new folder on your Desktop with the same name as the zipped file.

If not already checked, check the option to **Show Extract Files....**

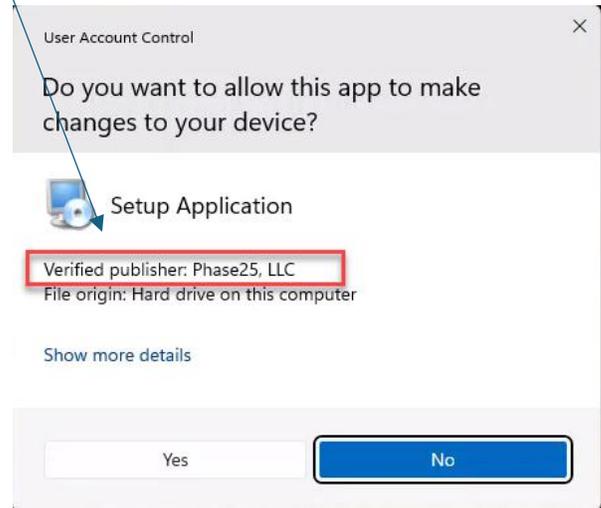
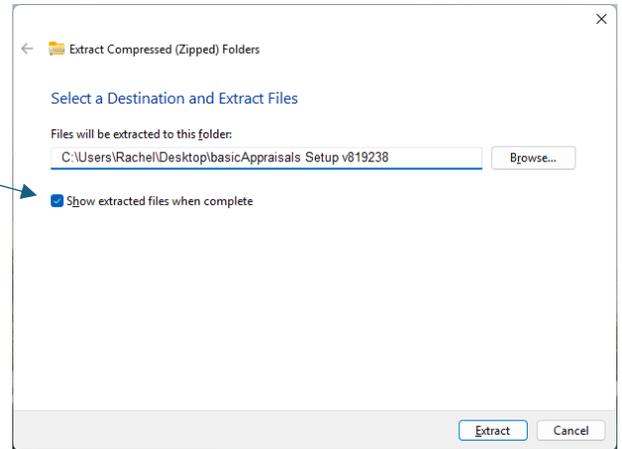
Click **Extract** to unzip the file. Note that the Setup file has the file extension .exe

Right-click on the application Setup file and choose **Run As Administrator** to begin the install.

Answer **Run Anyway** or **Yes** to any security prompts as long as you see our verified Publisher name, Phase25, LLC, text on the prompt.

The installer will open; click the **Next** button on each window and make any changes you wish, then click **Finish** on the last option.

The application icon will be placed on your Desktop.



Uninstalling A Previous Version

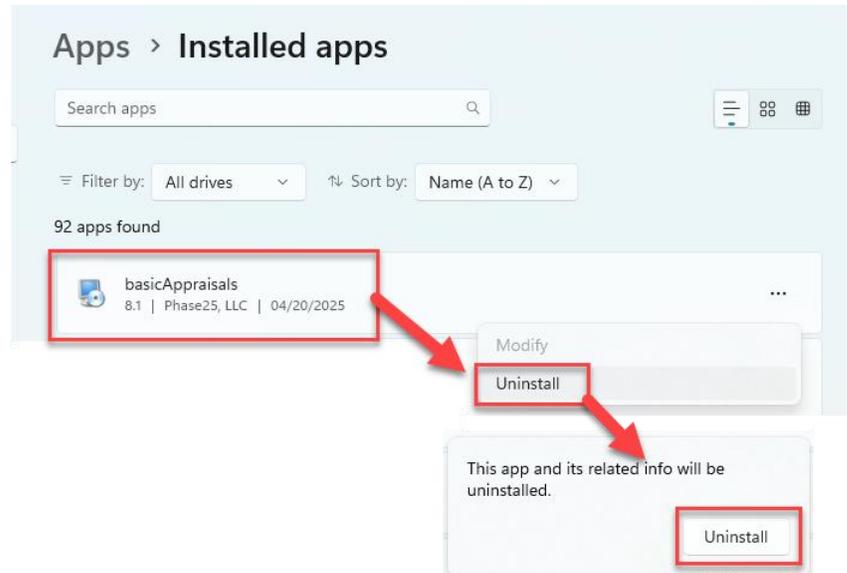
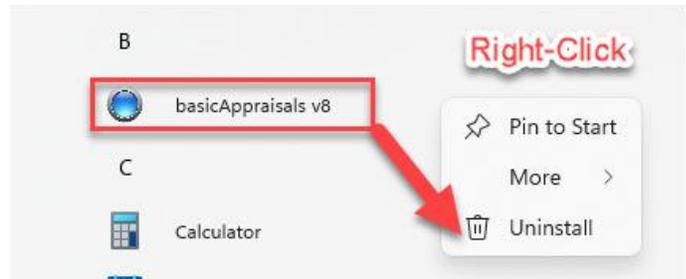
If you have an earlier release of the Version 8 (the last four numbers on the Release are smaller), you will need to uninstall it before upgrading to the newest release. To do that, follow these steps:

Open your Windows Start menu and find the **<application name>** icon.

Right-click on it to show the drop-down menu.

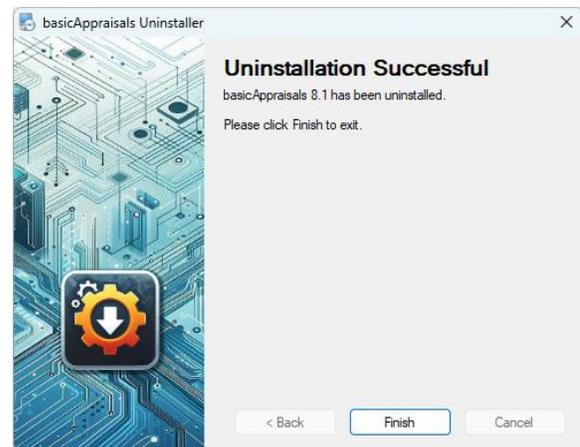
Click **Uninstall**.

On Windows 11, the Windows Apps > Installed Apps list will open. Find the application name in the list and choose **Uninstall**, then click **Uninstall** again.



You may see a security prompt asking to allow the app to make changes. As long as you see the “Verified Published: Phase25, LLC text, it’s safe to continue. Click **Yes**.

The Uninstall dialog will open; click **Next**, then **Finish**.



On Windows 11, you’ll see the Apps > Installed Apps list refreshed. Close this window and any other applications before installing the new version.

Getting Started

Double-click on application icon on your desktop to open it. If this is a new installation, the first time you open it a new database is created and populated with the default information (report templates, system settings, user guides, etc.). This database stores your application data in a single file, which has an extension of “.sdb”.

The default folder/location for this SQLite database is here:

`C:\Users\\Documents\\applicationName_Data.sdb`

You can use this startup database or if you want to move it to another folder on your computer, you can do that in Windows Explorer, just like moving any other file folder-to-folder. Only a couple of rules around that:

1. Close the application before moving the database.
2. **Do NOT move the database into a folder that’s linked to online file storage, like Google Drive or OneDrive.**

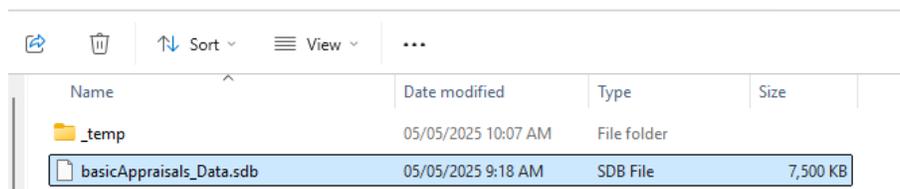
Why Not?

- a. Because every time you save data (a record) to your database, the online service will see that the file is changed and try to upload it to the cloud, slowing your computer’s processing and possibly locking the database until the “sync” is done.
 - b. When that happens, you may experience hang ups in the application, or even lock ups where you have to restart the application to get a connection with the database again. A worst case scenario is that you lose your changes or corrupt the database.
 - c. As your database grows, the time to “sync” that file to the cloud will increase and cause further disruptions in the application.
3. After you move the database, the application will not find it the first time you open it again. Use the **Main Menu >> Utilities >> Open A Database** option to reconnect it.

You can see the current database’s file path on the bottom of the Main Menu. You can open the file location (folder) where it resides simply by double-clicking on that file path (example is showing basicAppraisals):



Windows Explorer will display the folder where the database has been created:



IMPORTANT: If you had a previous version of any of our products (NOT Version 8), see the user guide for that application, which may have instructions for a Version Import utility on the Setup Wizard page. If available, this utility will convert and import your data into the new format.

System & User Requirements

Phase25 Software (Phase25, LLC) products are designed to be straightforward and easy to use, with minimal administration by the customer, both on a hardware and software level. We strive to quickly resolve any and all issues regarding installation, performance and daily usage; however following these standard Requirements must be met before we can effectively do so.

General User Requirements

- Users must have an overall general understanding of how to use a computer, including but not limited to*:
 - Basic Windows skills, such as copy/paste functions and file & folder navigation in Windows Explorer
 - General Outlook email familiarity to adjust personal settings (Outlook Rules & Alerts & Mail Account settings)

User (Workstation) Hardware Requirements

- Operating Systems: Windows 10, Windows 11 (please make sure all updates and service packs are applied regularly)
- MINIMUM 8GB RAM (12GB+ Suggested). More RAM results in better performance.
- 10MB Hard Drive Space for setup and installation; additional storage required for database
- Video Resolution Minimum of 1280 x 800 (100% Resolution); settings that vary from the default proportions for your system may cause some pages to appear distorted
- Microsoft Outlook 2016 or Office 365 (for email integration & user-to-user Replication)
- High-Speed Internet Connection (for updates, remote support & user-to-user Replication)
- Other computer hardware less than 3 years old.

NOTE: All single-user licensed applications store data in a SQLite database, which is a standalone database engine widely deployed in web browsers, operating systems mobile phones and desktop systems. This database type is called *zero-conf*, which means it needs no administrative services.

Enterprise Software Requirements

Enterprise versions support multiple users by adding features such as SQL Server / SQL Server Express integration. Contact support for pricing and additional information at www.phase25.com.

For multiple user customers, we require that **one person** from within your company be designated as the Contact Person for exchanging information about updates, support issues, and any other communication with Phase25 Software regarding the training, installation and general daily operations of the software product. We do not support each user on a one-to-one basis in multi-user situations; the Contact Person within the company is responsible for mitigating on-site issues and communicating those personally to the support staff at Phase25 Software and then reporting any resolutions, update notices, etc., to the licensed users within the company.

- Supported Database Platforms (Enterprise)
 - Microsoft SQL Server 2016 or above - requires SQL Server installed and operating on a company network and is NOT included in our software packaging, installations or pricing.
 - Microsoft SQL Server EXPRESS 2014 - requires SQL Server Express 2014, which is a free product available from Microsoft's website (<https://www.microsoft.com/en-US/download/details.aspx?id=42299>).
 - We recommend downloading and installing the SQL Server Management Studio 2014 (free) to facilitate setting up the application login and password required by our software. Please refer to Microsoft documentation for system requirements for their products.*
- Replication Requirements (Enterprise)
 - Microsoft Outlook 2016 or above or Office 365
 - High-Speed Internet Connection
 - For Replicator Server Utilities - Windows Server NOT required (Replicator can run on a workstation); however the workstation should be an up-to-date computer with a minimum of 16GB of RAM to efficiently process replication packages for client systems.

*We provide instructions for setting up an application role login and password on SQL servers, however, we do not support the overall operations of any SQL Server products as that is the responsibility of the vendor from which it was purchased.

End-User License Agreement

All Phase25 Software Products

IMPORTANT-READ CAREFULLY: This End-User License Agreement ("EULA") is a legal agreement between you (either an individual or a single entity) and Phase25 Software (Phase25 Tech, LLC) for the software product(s) accompanying this EULA, which include(s) computer software and may include "online" or electronic documentation, associated media, and printed materials ("SOFTWARE PRODUCT"). By installing, copying, or otherwise using the SOFTWARE PRODUCT or any UPDATES (as defined below), you agree to be bound by the terms of this EULA. If you do not agree to the terms of this EULA, do not install, copy, or otherwise use the SOFTWARE PRODUCT; you may, however, return it to your place of purchase for a full refund. In addition, by installing, copying, or otherwise using any updates or other components of the SOFTWARE PRODUCT that you receive separately as part of the SOFTWARE PRODUCT ("UPDATES"), you agree to be bound by any additional license terms that accompany such UPDATES. If you do not agree to the additional license terms that accompany such UPDATES, you may not install, copy, or otherwise use such UPDATES.

SOFTWARE PRODUCT LICENSE

The SOFTWARE PRODUCT is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. The SOFTWARE PRODUCT is licensed, not sold. NOTE: The terms of a printed, paper EULA which may accompany the SOFTWARE PRODUCT supersede the terms of any on-screen EULA found within the SOFTWARE PRODUCT.

1. LICENSE TO USE SOFTWARE PRODUCT.

1.1 General License Grant. Phase25 Software grants to you as an individual, a personal, nonexclusive license to install copies of the SOFTWARE PRODUCT on an unlimited number of computers provided that you are the only individual using the SOFTWARE PRODUCT. If you are an entity, Phase25 Software grants you the right to designate one individual within your organization to have the sole right to use the SOFTWARE PRODUCT in the manner provided above, unless entity meets the criteria described in provision 1.2.

1.2 If you are an entity for whom the SOFTWARE PRODUCT was specifically and exclusively designed and designated as CUSTOM SOFTWARE, only direct employees of the entity have license to install and use it. Entity has no rights to resell the SOFTWARE PRODUCT or any portion of the design, documentation or accompanying materials (see provision 2.1 below).

1.3 Documentation. This EULA grants you, as an individual, a personal, nonexclusive license to make and use an unlimited number of copies of any documentation, provided that such copies shall be used only for personal purposes and are not to be republished or distributed (either in hard copy or electronic form) beyond the user's premises.

1.4 Storage/Network Use. You may also store or install a copy of the SOFTWARE PRODUCT on a storage device, such as a network server, used only to install or run the SOFTWARE PRODUCT on computers used by a licensed end user in accordance with Section 1.1. A single license for the SOFTWARE PRODUCT may not be shared or used concurrently by other end users.

1.5 Third-party Components of EULA. Components that you receive as part of the SOFTWARE PRODUCT may include a separate end-user license agreement (each, a "Component EULA"). Except as provided in Section 6, in the event of inconsistencies between this EULA and any Component EULA, the terms of this EULA shall control.

2. DESCRIPTION OF OTHER RIGHTS AND LIMITATIONS

2.1 Resale: This is a general license grant which entitles you to use the SOFTWARE PRODUCT; consequently you may not resell, or otherwise transfer for value, the SOFTWARE PRODUCT.

2.2 Limitations on Reverse Engineering, Decompilation, and Disassembly. You may not reverse engineer, decompile, or disassemble the SOFTWARE PRODUCT, except and only to the extent that such activity is expressly permitted by applicable law notwithstanding this limitation.

2.3 Rental. You may not rent, lease, or lend the SOFTWARE PRODUCT.

2.4 This EULA does not grant you any rights in connection with any trademarks or service marks of Phase25 Software

2.5 Support Services. Phase25 Software may provide you with support services related to the SOFTWARE PRODUCT ("Support Services"). Use of Support Services is governed by the Phase25 Software policies and programs described in the user manual, in "online" documentation and/or in other Phase25 Software-provided materials. Any supplemental software code provided to you as part of the Support Services shall be considered part of the SOFTWARE PRODUCT and subject to the terms and conditions of this EULA. With respect to technical information you provide to Phase25 Software as part of the Support Services, Phase25 Software may use such information for its business purposes, including for product support and development. Phase25 Software will not utilize such technical information in a form that personally identifies you.

2.6 Software Transfer. The initial user of the SOFTWARE PRODUCT may make a one-time permanent transfer of this EULA and SOFTWARE PRODUCT only directly to an end user. This transfer must include all of the SOFTWARE PRODUCT (including all component parts, the media and printed materials, any upgrades, this EULA, and, if applicable, the Certificate of Authenticity). Such transfer may not be by way of consignment or any other indirect transfer. The transferee of such one-time transfer must agree to comply with the terms of this EULA, including the obligation not to further transfer this EULA and SOFTWARE PRODUCT.

2.7 Separation of Components. The SOFTWARE PRODUCT is licensed as a single product. Its component parts may not be separated for use by more than one user.

2.8 Termination. Without prejudice to any other rights, Phase25 Software may terminate this EULA if you fail to comply with the terms and conditions of this EULA. In such event, you must destroy all copies of the SOFTWARE PRODUCT and all of its component parts and uninstall and remove all instances of the SOFTWARE PRODUCT on all computers.

3. PRERELEASE CODE.

Portions of the SOFTWARE PRODUCT may be identified as prerelease code ("Prerelease Code"). Such Prerelease Code is not at the level of performance and compatibility of the final, generally available product offering. The Prerelease Code may not operate correctly and may be substantially modified prior to first commercial shipment. Phase25 Software is not obligated to make this or any later version of the Prerelease Code commercially available. The grant of license to use Prerelease Code expires upon availability of a commercial release of the Prerelease Code from Phase25 Software. NOTE: In the event that Prerelease Code contains a separate end-user license agreement, the terms and conditions of such end-user license agreement shall govern your use of the corresponding Prerelease Code.

4. UPGRADES.

If the SOFTWARE PRODUCT is labeled as an upgrade, you must be properly licensed to use a product identified by Phase25 Software as being eligible for the upgrade in order to use the SOFTWARE PRODUCT. A SOFTWARE PRODUCT labeled as an upgrade replaces and/or supplements the product that formed the basis for your eligibility for the upgrade. You may use the resulting upgraded product only in accordance with the terms of this EULA. If the SOFTWARE PRODUCT is an upgrade of a component of a package of software programs that you licensed as a single product, the SOFTWARE PRODUCT may be used and transferred only as part of that single product package and may not be separated for use on more than one computer.

5. COPYRIGHT.

All title and intellectual property rights in and to the SOFTWARE PRODUCT (including but not limited to all source code, any images, photographs, animations, video, audio, music, text, and "applets" incorporated into the SOFTWARE PRODUCT), the accompanying printed materials, and any copies of the SOFTWARE PRODUCT are owned by Phase25 Software or its suppliers. All title and intellectual property rights in and to the content which may be accessed through use of the SOFTWARE PRODUCT is the property of the respective content owner and may be protected by applicable copyright or other intellectual property laws and treaties. This EULA grants you no rights to use such content. All rights not expressly granted are reserved by Phase25 Software. All original source code (Phase25 Software Solutions Framework) is the property of Phase25 Software. without exception.

6. U.S. GOVERNMENT RESTRICTED RIGHTS.

The SOFTWARE PRODUCT and documentation are provided with RESTRICTED RIGHTS. Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 or subparagraphs (c)(1) and (2) of the Commercial Computer Software-Restricted Rights at 58 CFR 52.227-19, as applicable. Manufacturer Phase25 Software, 31186 CSAH 34, Litchfield, MN 55355.

7. EXPORT RESTRICTIONS.

You agree that you will not export or re-export the SOFTWARE PRODUCT, any part thereof, or any process or service that is the direct product of the SOFTWARE PRODUCT (the foregoing collectively referred to as the "Restricted Components"), to any country, person, entity or end user subject to U.S. export restrictions. You specifically agree not to export or re-export any of the Restricted Components (i) to any country to which the U.S. has embargoed or restricted the export of goods or services, which currently include, but are not necessarily limited to Cuba, Iran, Iraq, Libya, North Korea, Sudan and Syria, or to any national of any such country, wherever located, who intends to transmit or transport the Restricted Components back to such country; (ii) to any end-user who you know or have reason to know will utilize the Restricted Components in the design, development or production of nuclear, chemical or biological weapons; or (iii) to any end-user who has been prohibited from participating in U.S. export transactions by any federal agency of the U.S. government. You warrant and represent that neither the BXA nor any other U.S. federal agency has suspended, revoked, or denied your export privileges.

MISCELLANEOUS

If you acquired this product in the United States, this EULA is governed by the laws of the State of Minnesota. If this product was acquired outside the United States, then local law may apply. Should you have any questions concerning this EULA, or if you desire to contact Phase25 Software for any reason, send request to: Phase25, LLC, 31186 CSAH 34, Litchfield, MN 55355.

LIMITED WARRANTY

Phase25 Software warrants that (a) the SOFTWARE PRODUCT will perform substantially in accordance with the accompanying written materials for a period of thirty (30) days from the date of receipt, and (b) any Support Services provided by Phase25 Software shall be substantially as described in applicable written materials provided to you by Phase25 Software, and Phase25 Software support engineers will make commercially reasonable efforts to solve any problem. To the extent allowed by applicable law, implied warranties on the

SOFTWARE PRODUCT, if any, are limited to thirty (30) days. Some states/jurisdictions do not allow limitations on duration of an implied warranty, so the above limitation may not apply to you.

CUSTOMER REMEDIES

Phase25 Software's and its suppliers' entire liability and your exclusive remedy shall be, at Phase25 Software's option, either (a) return of the price paid, if any, or (b) repair or replacement of the SOFTWARE PRODUCT that does not meet Phase25 Software's Limited Warranty and that is returned to Phase25 Software with a copy of your receipt. This Limited Warranty is void if failure of the SOFTWARE PRODUCT has resulted from accident, abuse, or misapplication. Any replacement SOFTWARE PRODUCT will be warranted for the remainder of the original warranty period or thirty (30) days, whichever is longer. Outside the United States, neither these remedies nor any product support services offered by Phase25 Software are available without proof of purchase from an authorized international source.

NO OTHER WARRANTIES. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, PHASE25 SOFTWARE AND ITS SUPPLIERS DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, IMPLIED WARRANTIES OR CONDITIONS OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE AND NON-INFRINGEMENT, WITH REGARD TO THE SOFTWARE PRODUCT, AND THE PROVISION OF OR FAILURE TO PROVIDE SUPPORT SERVICES. THIS LIMITED WARRANTY GIVES YOU SPECIFIC LEGAL RIGHTS. YOU MAY HAVE OTHERS, WHICH VARY FROM STATE/JURISDICTION TO STATE/JURISDICTION. LIMITATION OF LIABILITY. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL PHASE25 SOFTWARE OR ITS SUPPLIERS BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT, OR CONSEQUENTIAL DAMAGES WHATSOEVER (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, LOSS OF BUSINESS INFORMATION, OR ANY OTHER PECUNIARY LOSS) ARISING OUT OF THE USE OF OR INABILITY TO USE THE SOFTWARE PRODUCT OR THE FAILURE TO PROVIDE SUPPORT SERVICES, EVEN IF PHASE25 SOFTWARE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN ANY CASE, PHASE25 SOFTWARE'S ENTIRE LIABILITY UNDER ANY PROVISION OF THIS EULA SHALL BE LIMITED TO THE GREATER OF THE AMOUNT ACTUALLY PAID BY YOU FOR THE SOFTWARE PRODUCT OR U.S.\$5.00; PROVIDED, HOWEVER, IF YOU HAVE ENTERED INTO A PHASE25 SOFTWARE SUPPORT SERVICES AGREEMENT, PHASE25 SOFTWARE'S ENTIRE LIABILITY REGARDING SUPPORT SERVICES SHALL BE GOVERNED BY THE TERMS OF THAT AGREEMENT. BECAUSE SOME STATES/JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATION OF LIABILITY, THE ABOVE LIMITATION MAY NOT APPLY TO YOU.



Small Business Software Built with Enterprise DNA

Microsoft Windows, Outlook, Word, Excel, Access, PowerPoint, Publisher, SQL Server and SQL Server Express are registered trademarks of Microsoft Corporation. All other products are registered trademarks of their respective vendors.