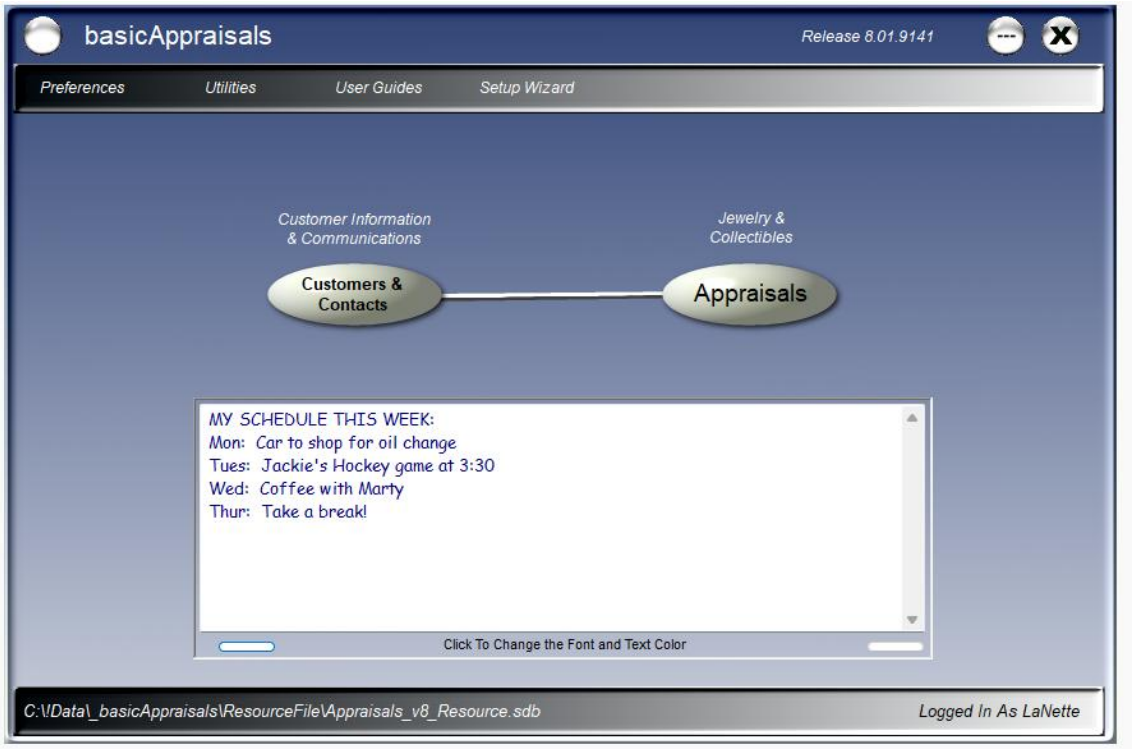


# basicAppraisals Installation & Setup

*Version 8 – February 2025*

Small Business Software Built with Enterprise DNA

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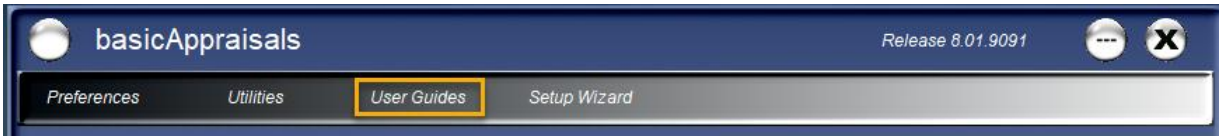
# basicAppraisals Installation & Setup Guide

## Overview

This guide is a resource for users of this application:

- basicAppraisals v8.x www.basicAppraisals.com

For additional information, click on User Guides on the Main Menu to visit our Support site. All user guides and video tutorials are FREE!

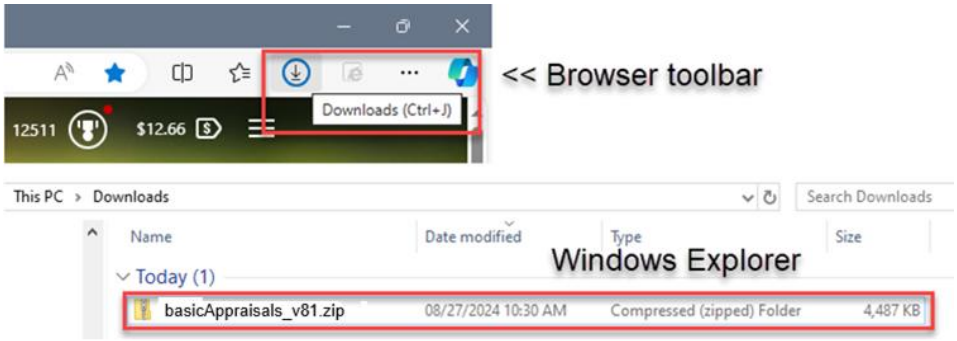



**basicAppraisals** is built on the latest Microsoft technology and will install and run on any **Windows 10 or 11** system that meets the basic system requirements (8GB RAM [minimum] and 10MB Hard Drive Space, .NET Framework 4.6.1 or higher. **NOTE: basicAppraisals does not install or run on Macintosh (macOS) systems.**

## Downloading the Installer

All Phase25 software products are available via download, either from our website or from a Licensed User email link. Follow these steps below to begin:

1. There will be a link in the email called **Click to Download**. Click on the link to begin the download.
2. 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.

3. Copy this file to your Desktop.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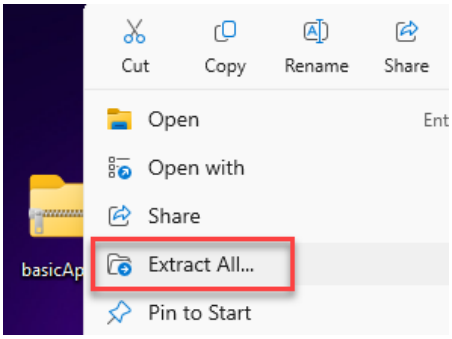
## Unzipping the Installer

The downloaded file is zipped or compressed to make a smaller package for traveling through the Internet. The next step unzips it so the installer can run.

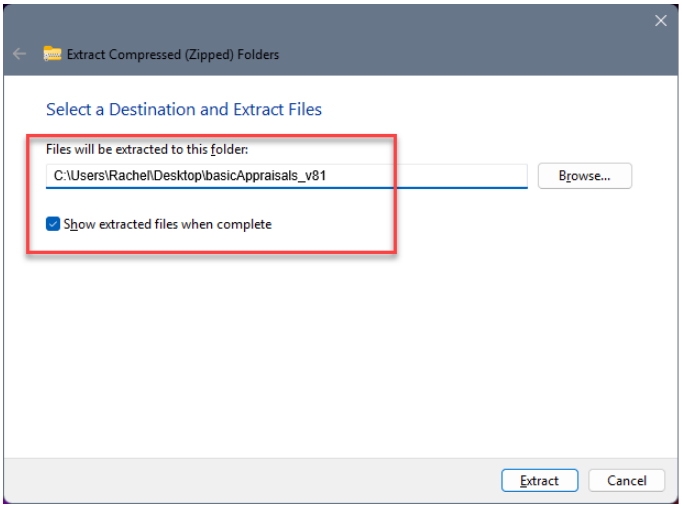



1. Right-click on the file and choose **Extract All**.

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

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

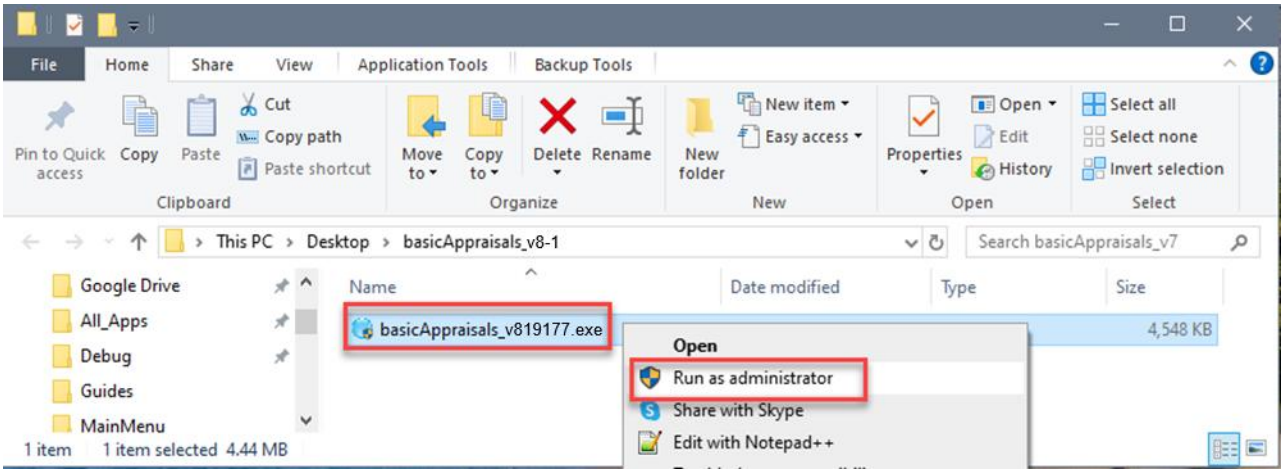
4. Click **Extract** to unzip the file.




## Running the Installer

Windows explorer will open the folder displaying the extracted installer file.

You can tell this is unzipped, as it will have a **Version Number** (v8191xx) on the end of the name, and the file extension will be **.exe**




5. Right-click on the installer and choose **Run As Administrator** to begin the install.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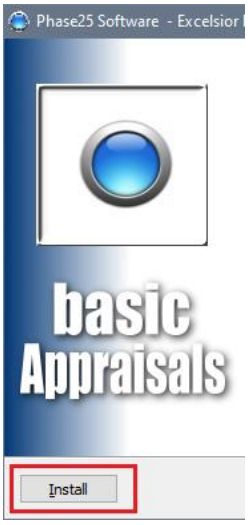
6. Answer **Allow Run** (or any similar prompts) that may popup from your antivirus or Windows security programs.
7. The installer will open and you will see a button called **Install** in the lower left corner of the first dialog. Click it to install the application to the default folder on your computer.
8. Click **Finish** on the **Installation Complete** dialog. You're done!




The **basicAppraisal** icon will be placed on your Desktop.

## The Main Menu

This is the form you see when you open the application. You can move the form around by holding your mouse down over the name of the application, or anywhere else on that top gray space (red box) and dragging it to move the window on your desktop or to another screen.

1. **Feature Buttons -** On the top is a toolbar with buttons that give you access to features and utilities that support the overall functionality of the applications. We'll go into these in further depth in another section of this document.
2. **Workflow Buttons** – While each of these buttons opens specific forms for your application (for example, the **Customers & Contacts** button opens the Contacts page), the general workflow of the application is defined with lines connecting the relationships across all of the forms. In the screen print above, **Customers & Contacts** have a one-to-many relationship with **Appraisals**. In other words, each Customer may have multiple appraisals entered for them.
3. **"My Notes" - One Big Sticky Note** – Ok, admit it, we all have sticky notes on our monitors to remind us of the "non-business" things we need to track each week. This space is personal to each user and the text "sticks" there until you change it. Your own private bulletin board!
4. **Your Current Database Location** – This shows the path to the database where your data is stored. You can double-click on it to open that folder in Windows Explorer if you need to find it.
5. **Login Name** – If login security is enabled you will see your Login Name here. If not (default) you'll see your Windows login name in this space.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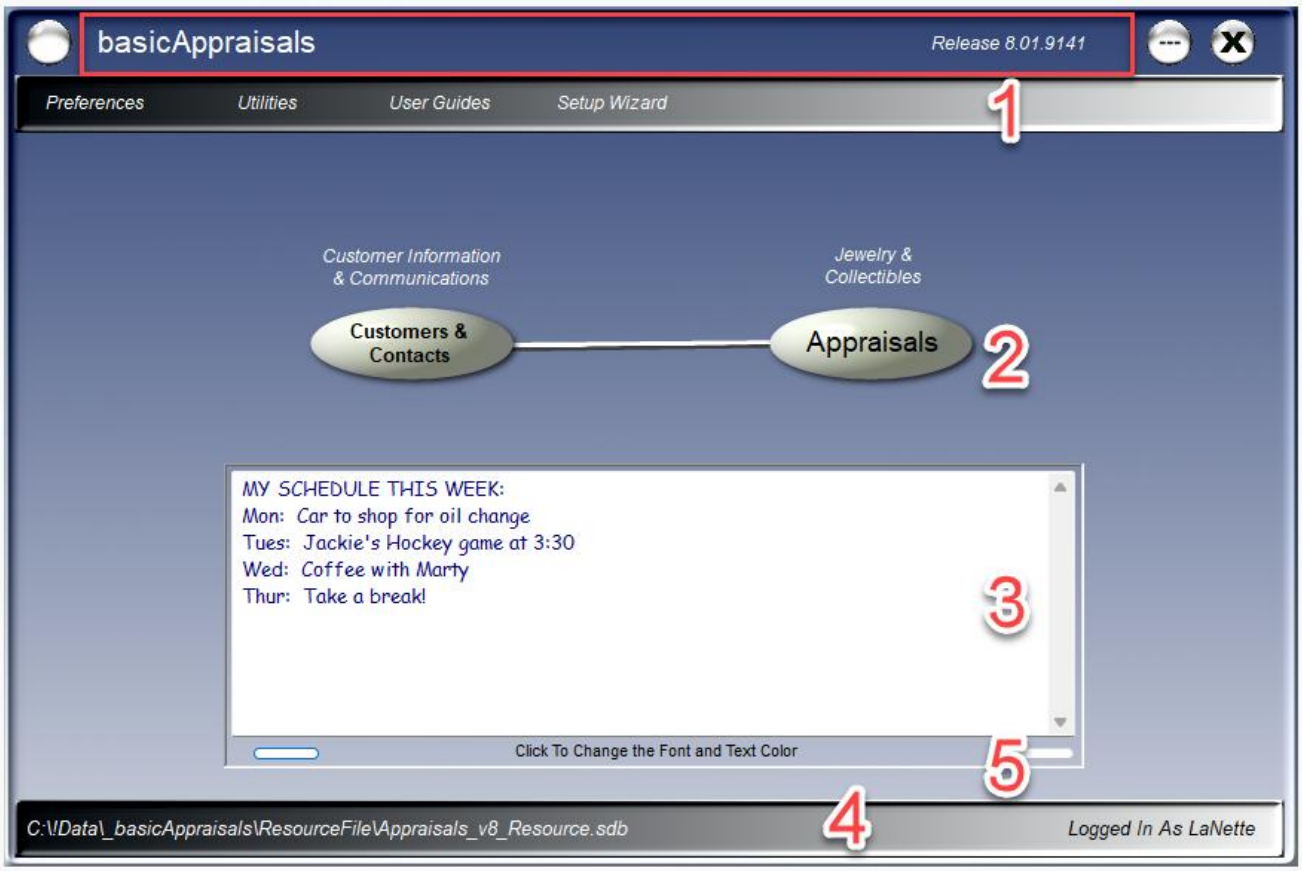



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## Where Is My Data Stored?

Double-click on the **basicAppraisals** icon on your desktop to open it. If this is a new installation, the first time you open **basicAppraisals** 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".

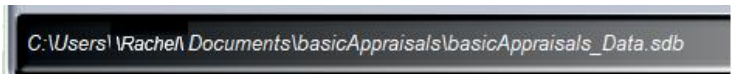
For example, with **basicAppraisals**, your database would be here:

C:\Users\<your name>\Documents\basicAppraisals\basicAppraisals_Data.sdb

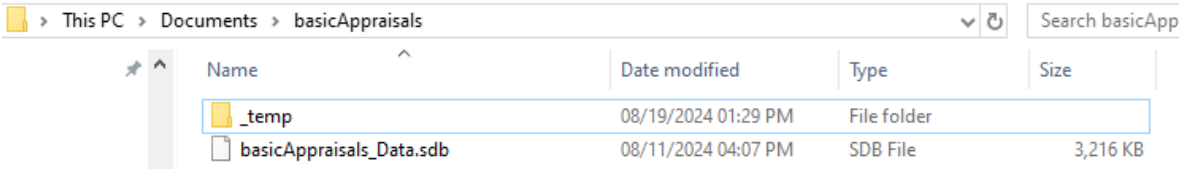
You can use this startup database or if you want to move it to another folder on your computer, you can do that in Windows Explorer, just like moving any other file folder-to-folder. Only a couple of rules around that:

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 worse 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 **Open 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.




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




***IMPORTANT:*** *If you had a previous version (5, 6 or 7) of this product, see the next section for importing your data from that database into this new database.*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# The Setup Wizard

## Time to Customize!

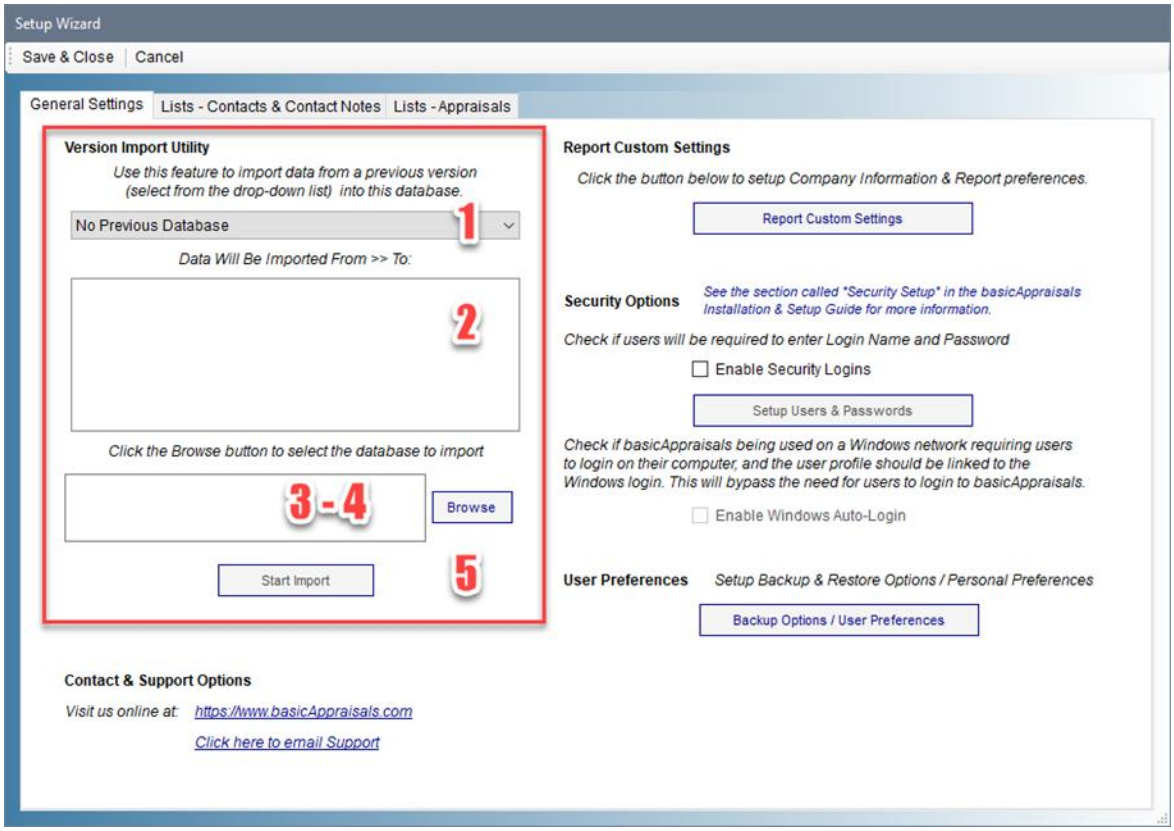
Our integrated Setup Wizard gives you a one-stop shop for adding the finishing touches to your new system. These settings can be changed at any time as your business needs change. However, the **Version Import** utility should be run immediately if you have a previous version of this Appraisals product.

**The Setup Wizard has:**

- A utility to import your data from a previous Version of **basicAppraisals.** If you have used any of the versions listed below, the **Version Import** utility will convert and import the data correctly into your new database.
    - 1-Step Appraisals v5.3
    - basicAppraisals v6.1
    - basicAppraisals v7.1
- A button to open the form where you enter Company information and logo. This information is used on Appraisals and other reports.
- An easy way to setup Security (not required).... But if your computer is used by others, and you want to password-protect WHO can use **basicAppraisals**, you can enable that option here.
- A simple interface for entering all of the values you need in the drop-down list on Contacts, Contact Notes, Appraisals and Appraisal Items.
- Our contact and support information, website & email address

Click the button called **Setup Wizard** on the Features toolbar at the top of the Main Menu to open it.

## Version Import Utility





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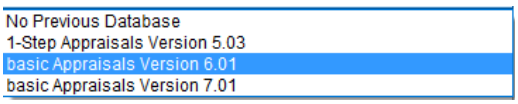
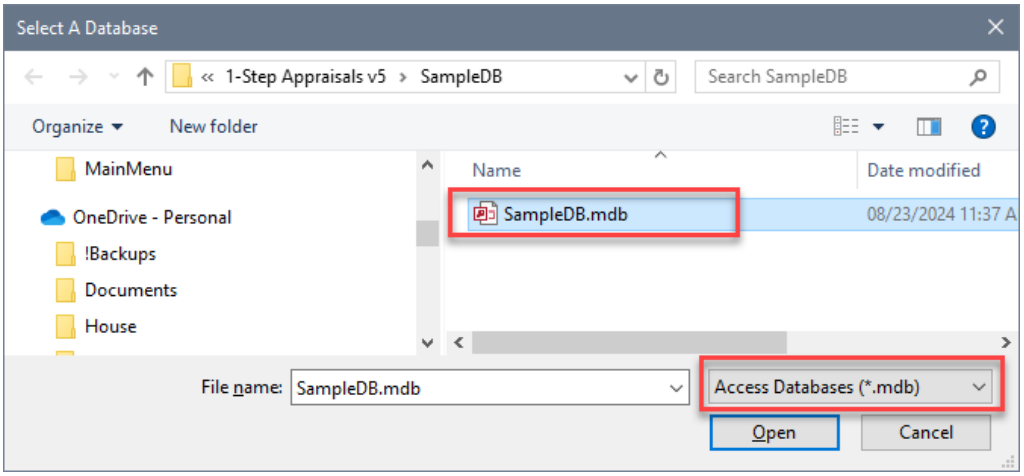
This utility will import data from any of the following older versions of our Appraisal systems.




1. Chose the correct version from the drop-down list based on the Version number on your current application.

   Match versions on the first three numbers. Example **6.01**.8150 = basicAppraisals Version 6.01

2. Depending on your version, the list below it shows what data will be imported.
3. Click the **Browse** button to select the database from the previous version. If you don't know where it is, open the previous version and look at the path on the Main Menu. In the image above, Version 5.3 shows the current path in the white bar at the top of the form. Versions 6 and 7 display the path at the bottom of the Main Menu.
   IMPORTANT: If you're upgrading from Version 5.3 or Version 6.1, the database type may be a Microsoft Access database, with a file extension of **.mdb**. When browsing for the database, change the Type drop-down list on the Open Dialog to **Access Databases (*.mdb)**, which will then show the database in the list of files.





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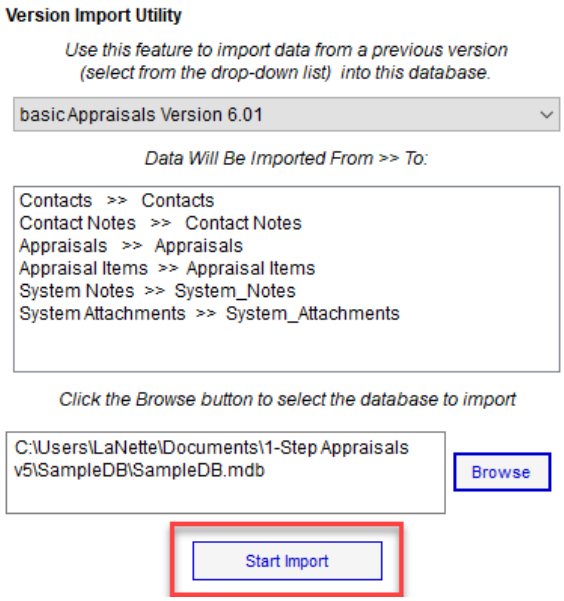
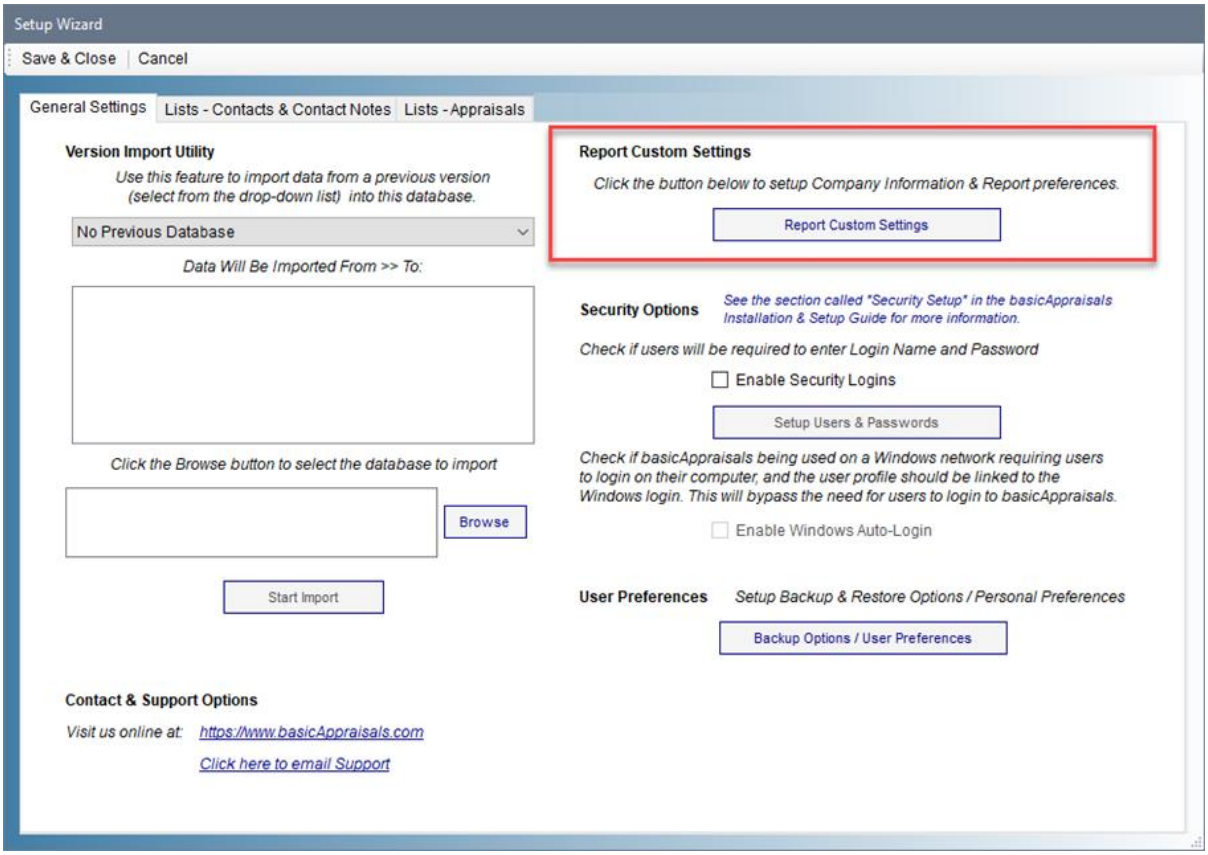
4. Click **Open** on the Browse dialog to display the name in the field:




5. Click the **Start Import** button to import the data. This only takes a minute or so to run, depending on the amount of data in the old database.

When this is finished, you can close the **Setup Wizard**, then open **Contacts** and **Appraisals** to review your data.

## Report Custom Settings





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The **Reports - Custom Settings** feature is where you store data for YOUR company such as name, address, phones, website, etc., and up to four logos (images), all of which the Report Designer can use to display on reports. You could enter this information manually on every Report Design, but if any of the data changes you would need to edit every Report Design record to change it. Entering it here means you only have one place to edit if you ever have changes.

The Report Designer, when printing, reads these options applies them to each report based on the labels and picture boxes you place on the Report Layout.

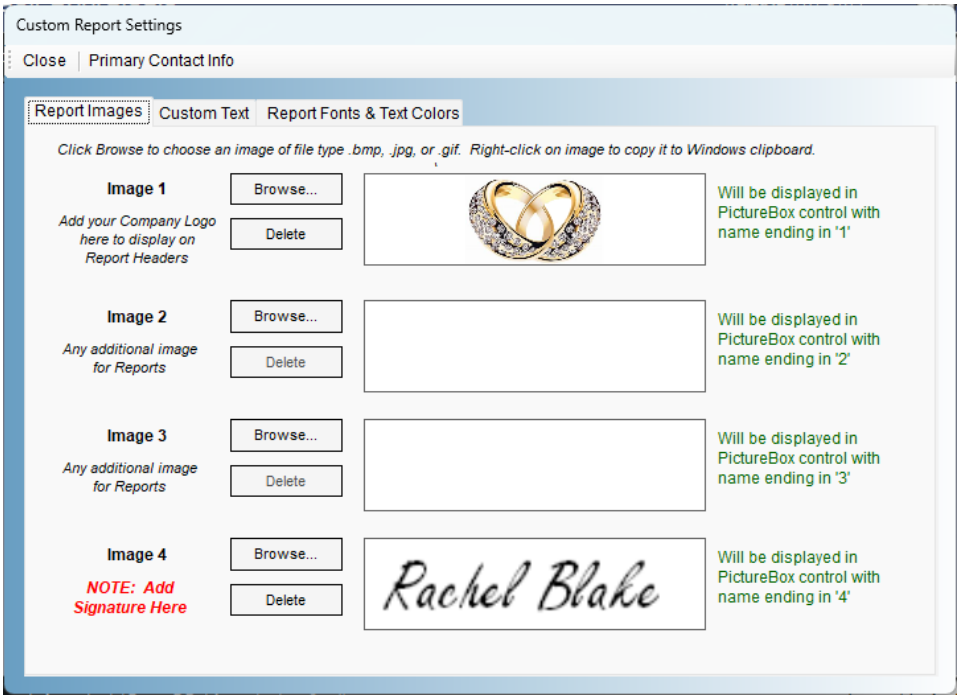
Click the **Report Custom Settings** button to open the dialog. NOTE: This option is also available from Main Menu >> Utilities >> (General Tab) >> Reports – Custom Report Settings These are the same settings, just another way to get to them.

## Report Images

You can add up to four images to use on Reports (NOTE: the default reports only use the first image on the header).

1. Click on the "Browse" button to choose each image.
2. You can delete an image by clicking the "Delete" button next to it.

Note the message in green text next to each picture box; the image "Will be displayed in Picture Box control with name ending in <n>"... This functionality will be addressed in the **Layout Designer** section of this guide.




## Custom Text

The second tab, "Custom Text" stores your business information, such as company name, address, phones, website address and email addresses.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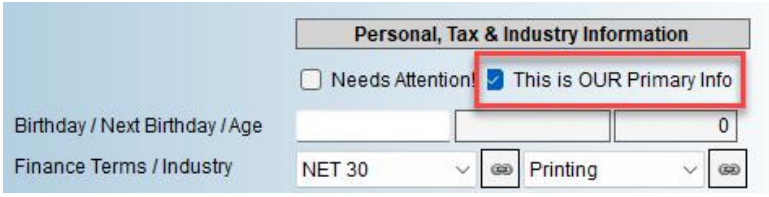
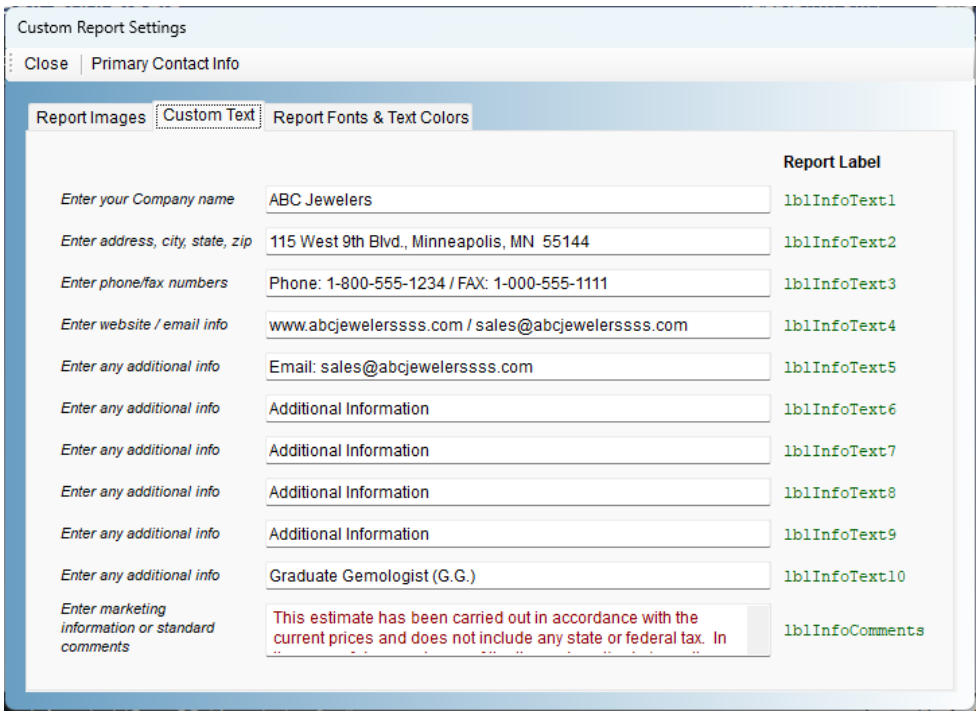
You can enter any text in any of the fields, but keep in mind where it will be displayed on reports. You may have to shorten or rephrase text after previewing it on all reports.

If you have already entered your Company information in Contacts, you can import it into this place by clicking the **Primary Contact Info** button on the toolbar. This will look for the record in Contacts where the **This Is Our Primary Info** checkbox is checked.




Note the green text next to each textbox: These are the name of the Labels that need to be on the report in order to use this information. This functionality is addressed in the **Layout Designer** section of the **Report Designer Guide**.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## Report Fonts & Text Colors

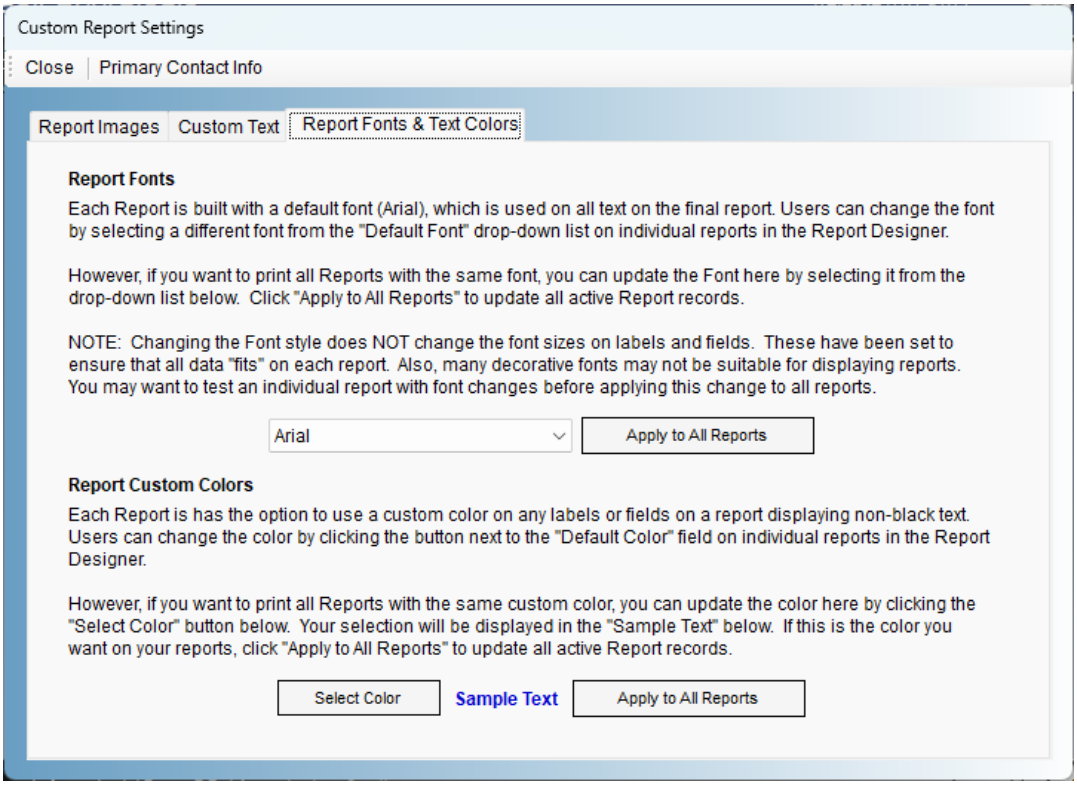
**Report Fonts:** Each Report is built with a default font (Arial), which is used on all text on the final report. Users can change the font for each report by selecting the font from the "Default Font" drop-down list in the Report Designer.

If you want to print all Reports with the same font, you can update the Font here by selecting it from the drop-down list below. Click "Apply to All Reports" to update all active Report Designer records.

NOTE: Changing the Font style does NOT change the font **sizes** on labels and fields. These have been set to ensure that all data "fits" on each report.

**Contrast Colors:** Each Report is has the option to use a custom “contrast” color on any labels or fields on a report displaying non-black text. Users can change the color by clicking the button next to the "Default Color" field on individual reports in the Report Designer.

However, if you want to print all Reports with the same contrast color, you can update the color here by clicking the **Select Color** button below. Your selection will be displayed in the **Sample Text** below. If this is the color you want on your reports, click **Apply to All Reports** to update all active Report records.





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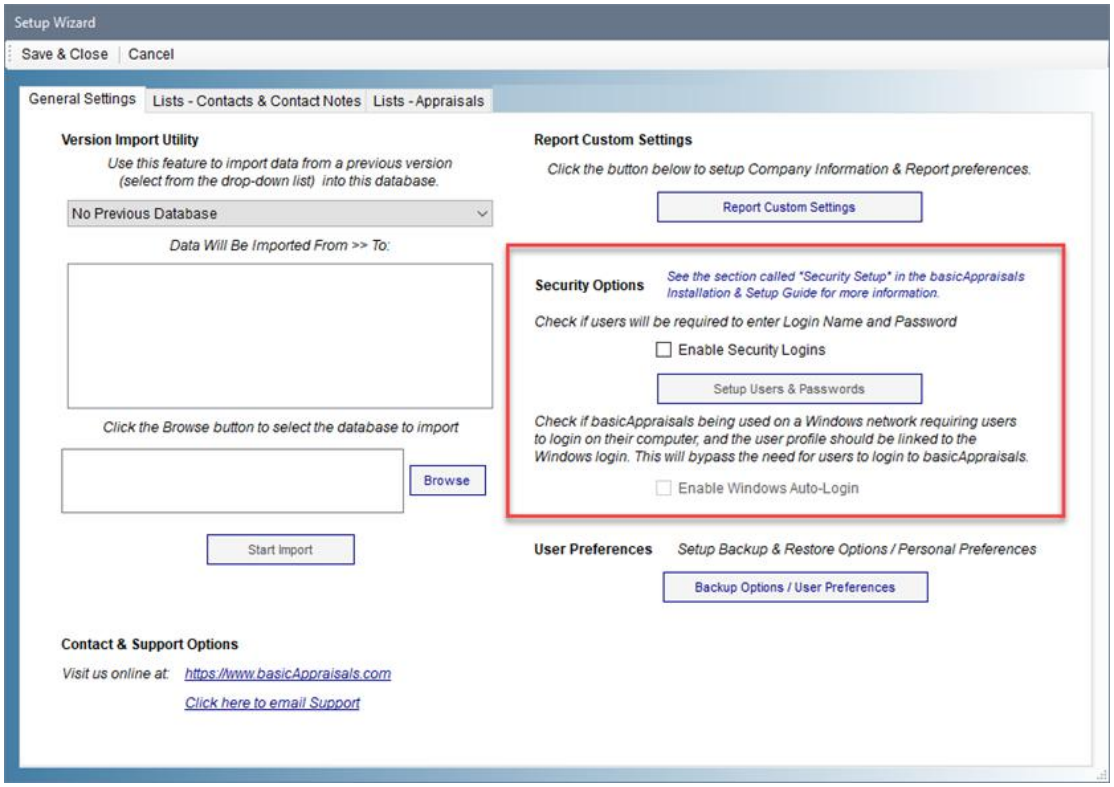
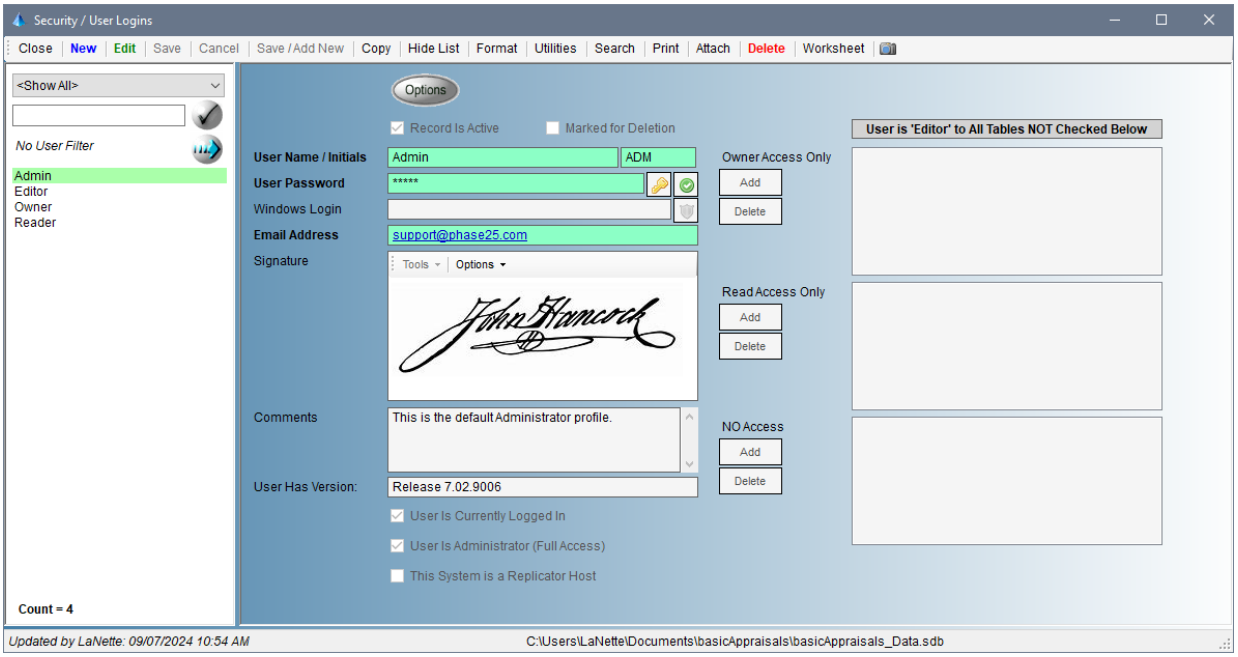
## Security Setup




Use this section to add login / password security to **basicAppraisals**. This is not necessary if you are the only user of the system. However, if your computer can be accessed by other users, and you do NOT want them to open and view your Appraisals, setting a login with a password will protect the database from unauthorized use.

Check the **Enable Security Logins** checkbox, which will then enable the **Setup Users & Passwords** button. Click it to open the Security page. There are four templates already in the table; see the **Sample Users** list on the next page for what they mean.





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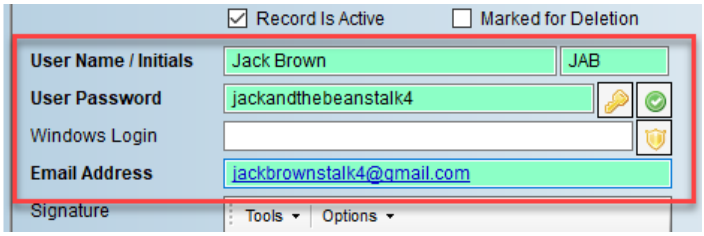
*Sample Users*

- **Admin** – this access level is for System Administrators; full access to everything, including the ability to create and edit other user logins. NOTE: the checkbox at the bottom of the first column, **User Is Administrator (Full Access)** must be checked. When checked, no other Security settings are applied.
- **Editor** – This access level is full access to everything EXCEPT the ability to create and edit other user logins.
- **Owner** – This lets users create new records, but they can only see and edit their own records.
- **Reader** – This lets the user see everything, but not edit anything.

If you are enabling Security, the first thing you should do is setup a login for yourself, **as an Administrator.** Only administrators can make changes to Security settings once the option is enabled, so don't lock yourself out!

Note that the **Is Active** checkbox is unchecked on all but the **Admin** record, as they're just samples. If you are turning on Security, you should keep the **Admin** record active, just in case you forget your own login password. The default password for that account is **admin**.

Below is a sample user entry, which only needs these four fields entered:



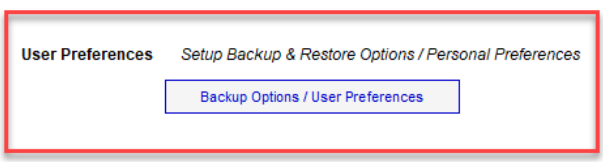

*Windows Login Option*

If your computer requires a login and password when you boot it up, click the button on the right side of the **Windows Login** field to copy that login name into the field. When Security is enabled, **basicAppraisals** will use your Windows Login to find your Security record. If found, you will not need to enter your password. This is most often used on a Windows network where multiple users have their own computer and consequently, a unique ID to login to the network. To enable this feature, the **Enable Windows Auto-Login** option must be checked on the **Setup Wizard**.

*Table-Level Security*

In the second column on the page you can further lock-down security based on a single table. For example, you might give someone access to edit Contacts and Contact Notes, but not "see" the Appraisals. To do that you would click the **Add** button on the **No Access** list at the bottom, and check the boxes for **Appraisals** and **Appraisal Items** on the user's Security record.

## Backup Options & User Preferences




Every Phase25 application has a variety of user settings (preferences) that let you customize the "look" of each page and worksheet, from setting Colors, filters and column orders to defining a Backup strategy.

Click on the **Backup Options / User Preferences** button to open the page. NOTE: this is also available on the Main Menu >> Tools >> Preferences.

Click on Main Menu >> Support >> User Guides and open the guide called **Phase25 User Preferences**.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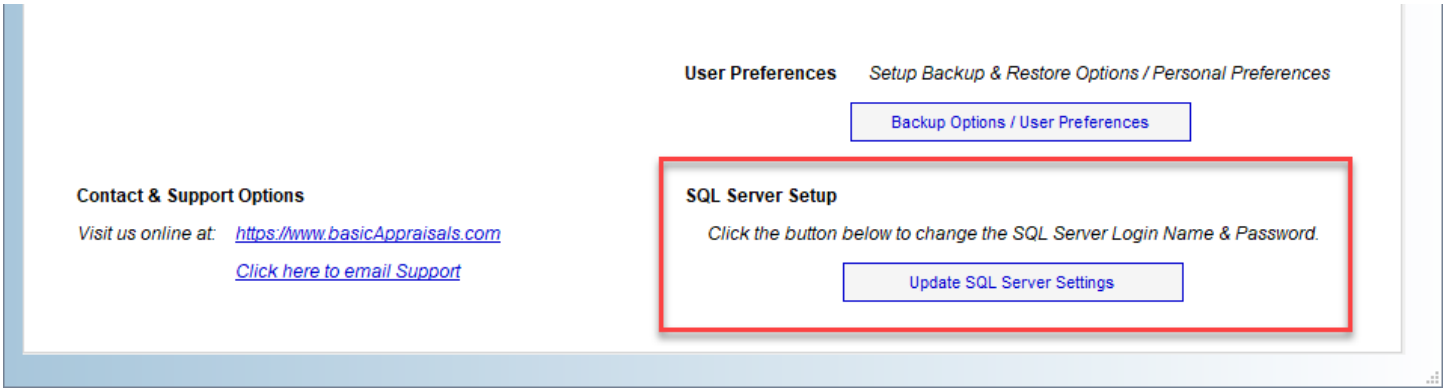
## SQL Server Setup

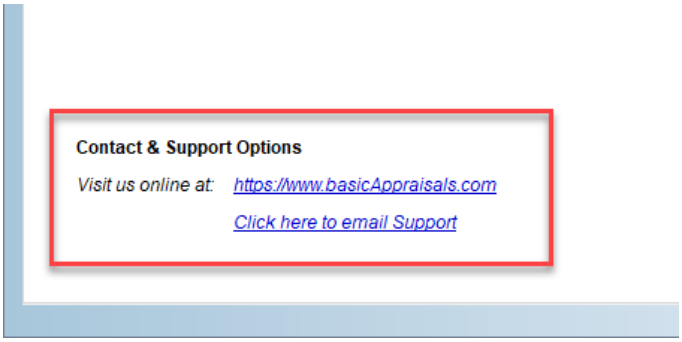
NOTE: This is only available on **Team** versions of our products.

This opens the dialog where you can change the Login Role and Password for your SQL Server. Please see the **Phase 25 Database Guide** for full information.




## Contact Information

You can reach support by email or by visiting our website (just click on the website address). To email Support, click on the link here to open a new email in Outlook. If you don't use Outlook, copy the link and paste it into your email application's **Send To** field.




## Custom Lists

The last three tabs in the Setup Wizard provide a way for you to define values for the drop-down lists on Contacts, Contact Notes, Appraisals and Appraisal Items. Every business has its own idea of how to categorize what they do. Basically, that's what choosing values in each of these lists does. For example, the **County** list on the **Contacts form**... you might want to track where your customers are if, for instance, you are planning a display at the County fair. You could filter your Contacts by that county name, then print labels for postcards to send, offering a "fair" discount if they visit you at the event.

Other lists such as **Appraisal Status** can be used to filter the Navigator on the Appraisals page, to see what still needs to be completed.

The values you see on the images below are added by default when a new database is created. However you can edit each list to reflect your business information.

On each list, click the **Add** button to add a value. Double-click on any item in the list to remove it. When you've completed all of the list, click the **Save These Settings** on the tab. Also, when you click **Save & Close** on the toolbar, all entries are saved.

NOTE: Each of these lists can also be edited, one at a time, in Main Menu >> Utilities >> (General Tab) >> Application Settings.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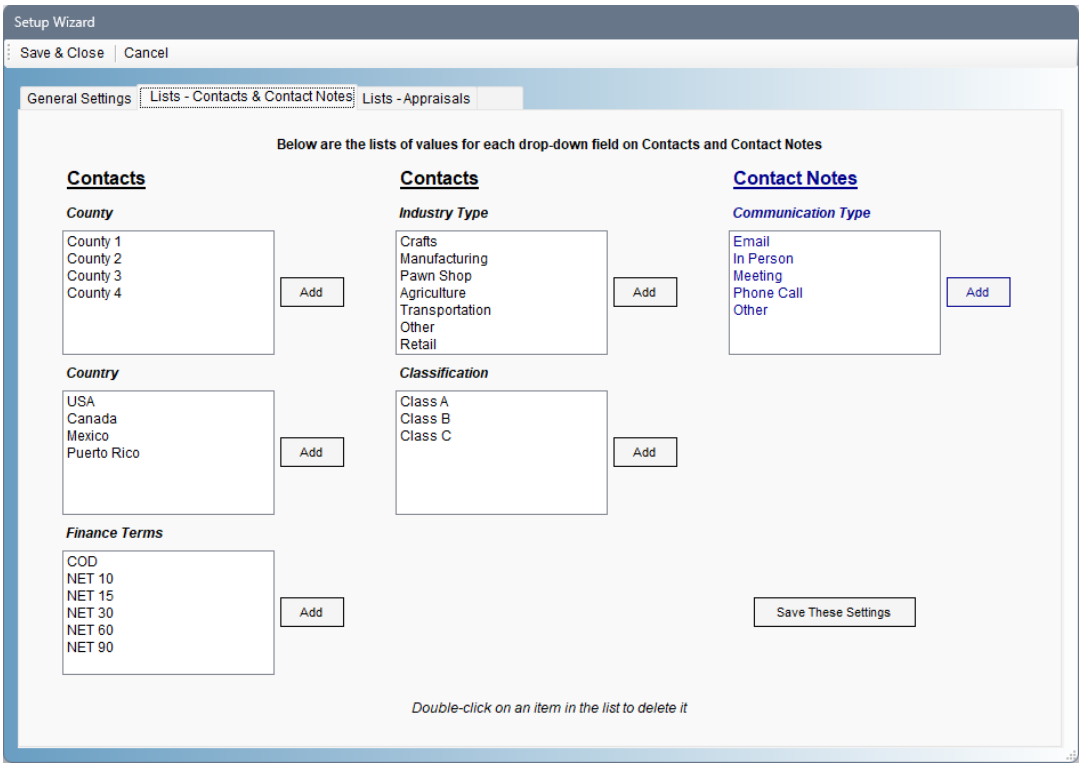
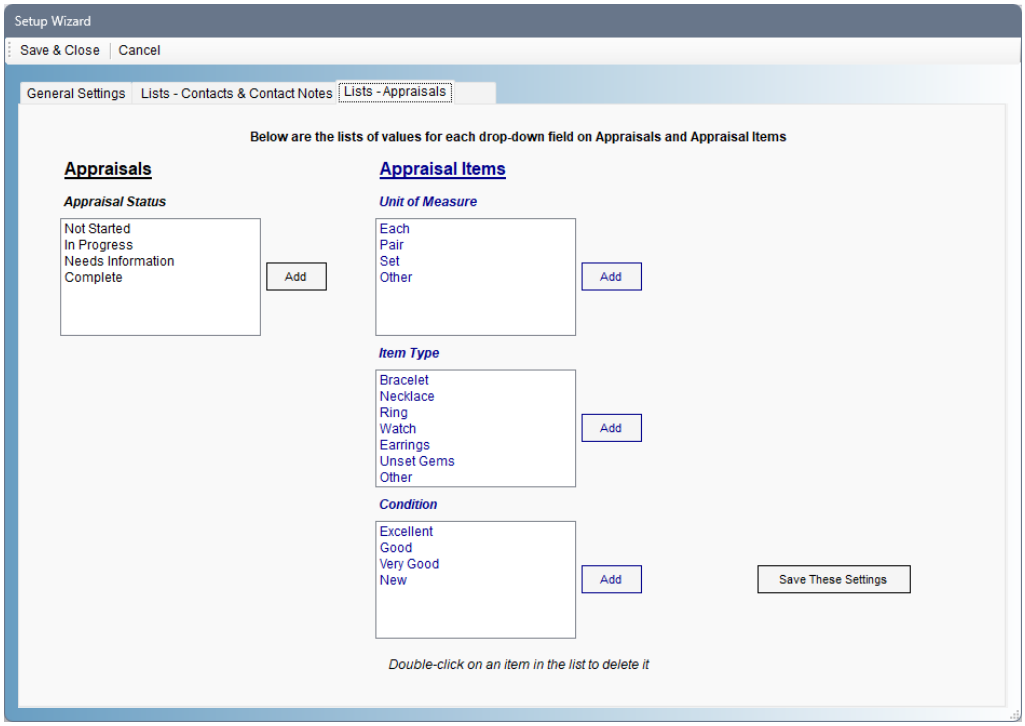
## Contacts & Contact Notes




## Appraisals & Appraisal Items





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You're done!  You can return to the Setup Wizard any time you want to to make changes to your system, such as adding more items to a list, or changing Security options.

## What's Next?

If you had a previous version of Appraisals, you can now uninstall it to remove the application from your computer. NOTE:  any databases that were created by that version will NOT be removed; you can archive them offline or delete them if you successfully converted your production data.

Click on the User Guides link on the top of the Main Menu to visit our Support site, where you can download any of our user guides (in .PDF format), or watch the training videos and tutorials.  They're ALL FREE!

Recommended Reading:  **basicAppraisals User Guide.pdf**


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# 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.

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