



## **Software Install Guide**

## Introduction

The *BudgetLink Community* Software suite has been developed to assist community organisations in undertaking their financial management in three primary ways:

- ✓ Create activity-based financial models from single activity to full organisational budgets
- ✓ Allocate service units against financial models to ascertain unit costs
- ✓ Automate reporting of actual and budgeted performance

This “Software Install Guide” forms part of a broader set of resources that, when combined, step through the full functionality of the software.

One of the strongest aspects of *BudgetLink Community* is its ability to connect to off-the-shelf accounting software, such as MYOB, Xero, Reckon, Sage etc. This provides for all the accounting data structures used by an organisation (e.g. Account and Activity lists) to be immediately available to the user within the software.

However, before undertaking a full data connection to a ‘live’ data file, we suggest initially connecting to the sample data file that is available within the software, to allow for a simpler initial review of the software, ascertaining its application to your organisation, then moving onto a full file connection once familiar with the software’s functionality. Both approaches are explained below.

## Install and Data File Set-Up

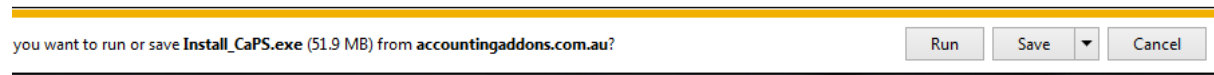
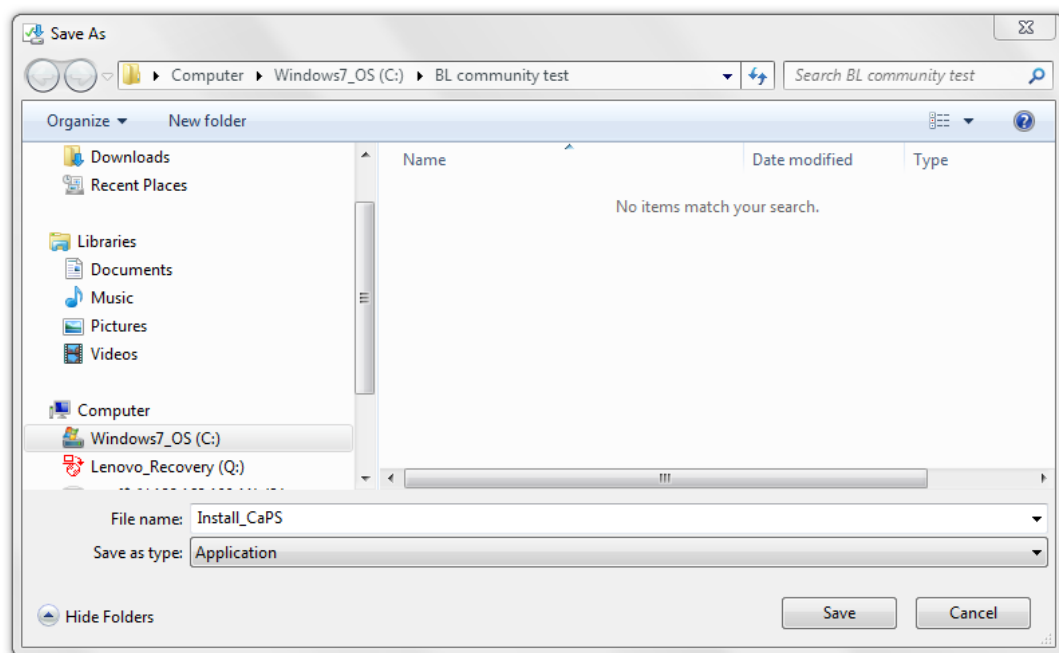
This document explains the BudgetLink Community software install process, together with connecting to either a sample data file or an accounting system data file. The Examples shown here refer to a MYOB data file but the process is the same for other accounting software.

The BudgetLink Community software is available via download link. Once you have clicked on the download link you will see something similar to the following, depending on your version of windows



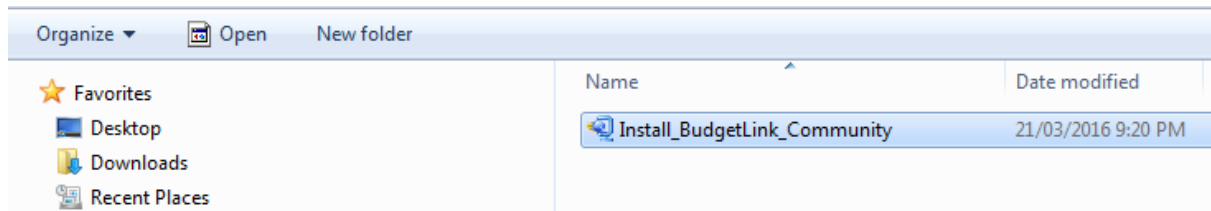
- Click the arrow next to the 'save' button, select 'save as'

The 'Save As' window will appear



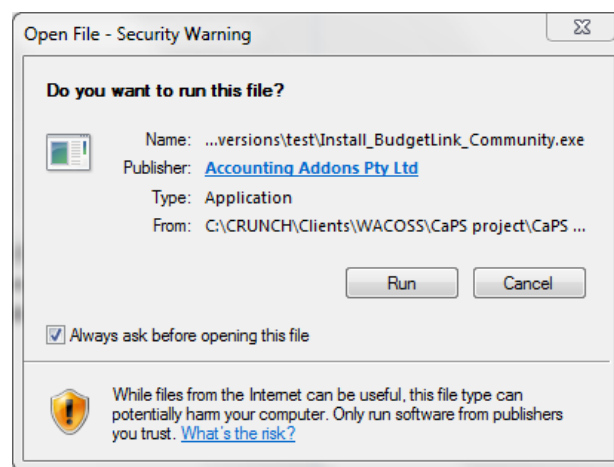
- Click the 'New folder' menu item and set-up a new folder in any part of your computer you choose, we recommend you use your local drive for the trial. In this example we've set up a folder called Computer > C: > BL Community Test
- Click the 'Save' button

An install file will appear in the 'Save As' window



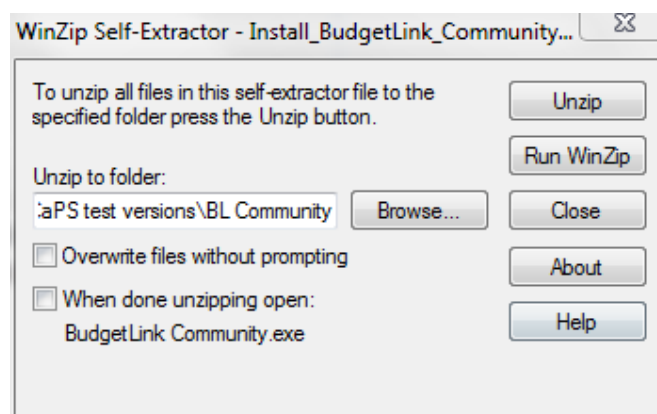
- Double click the install file

A security warning window may appear



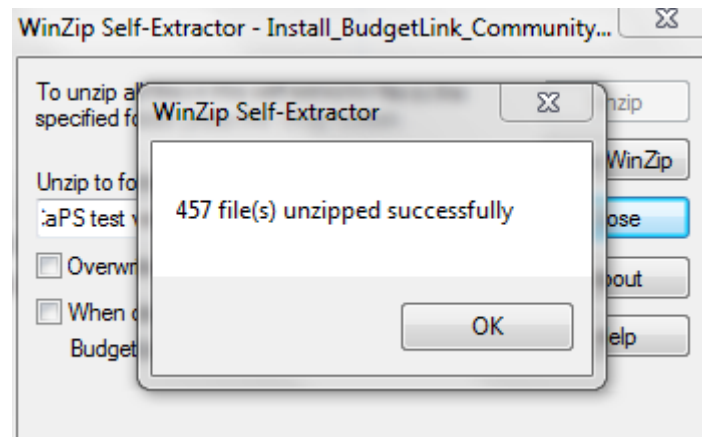
- Click the 'Run' button

The WinZip window will appear



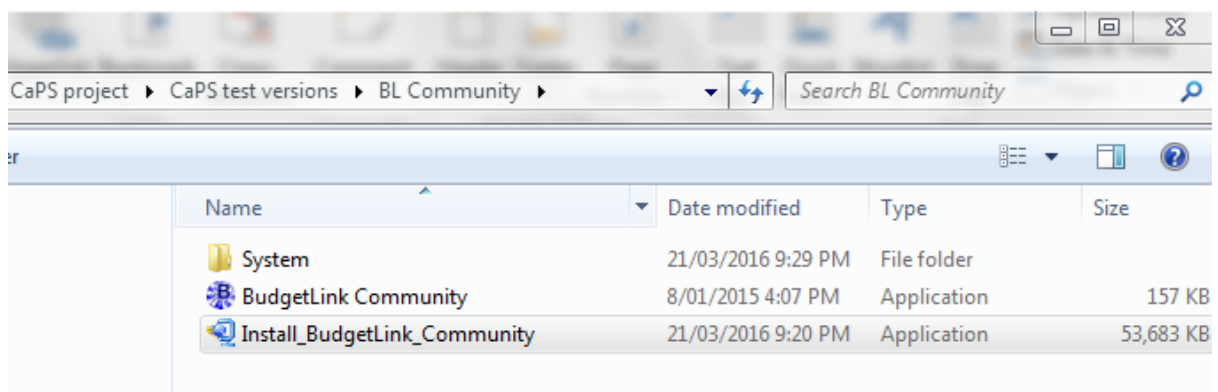
- 'Browse' to the same folder into which you installed the software
- 'Untick' the box "When done unzipping open: BudgetLink Community.exe"
- Click the 'Unzip' button

A message will appear to show the process is complete



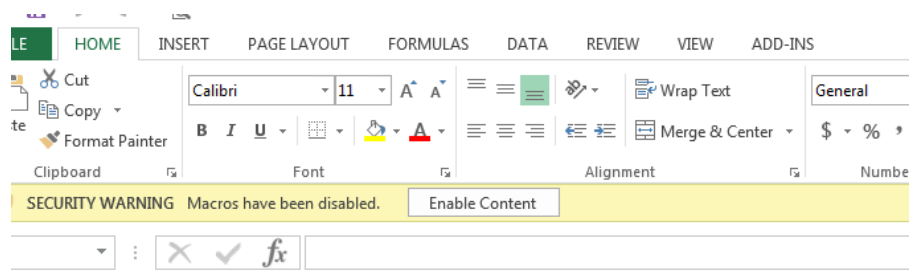
- Click 'OK'
- Click 'Close' on the Win Zip window

The install folder will now show a "System" folder and application icon



- Double click the "BudgetLink Community" application icon

You may see a security warning with an 'Enable Content' button

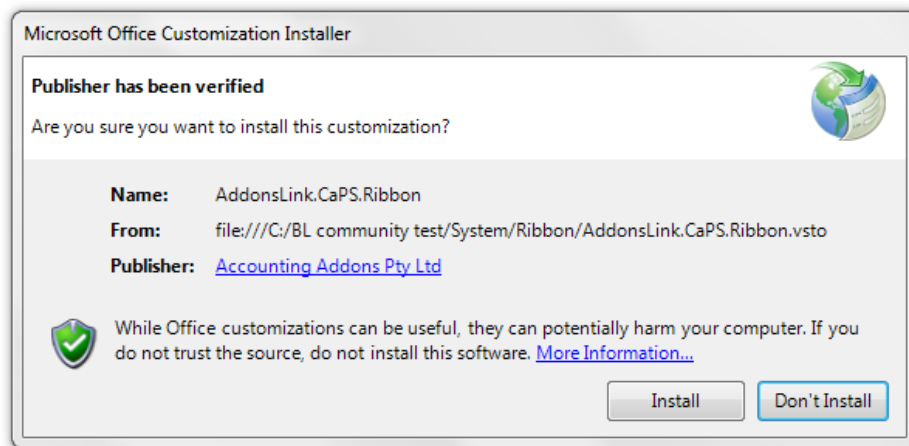


- Click 'Enable Content'

You may see a "Customisation Installer" warning

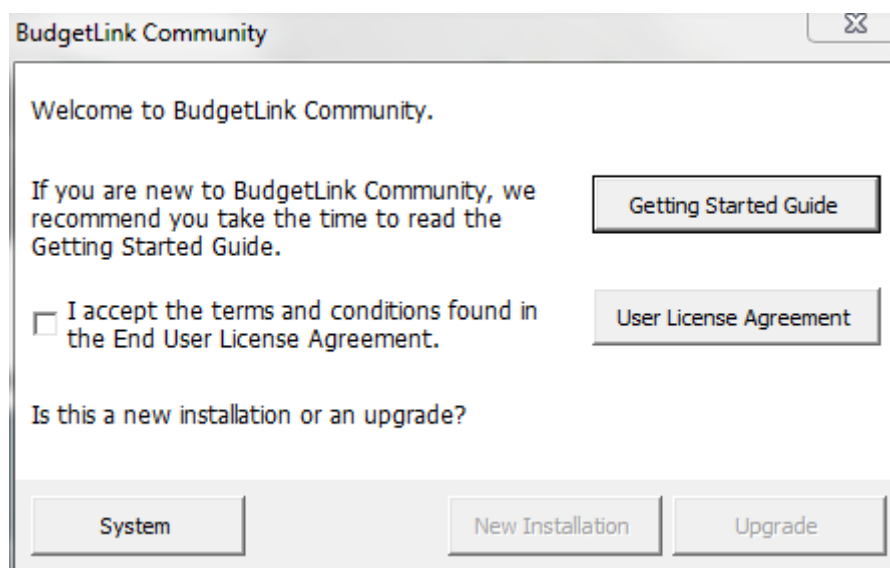
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dencies...



- Click 'Install'

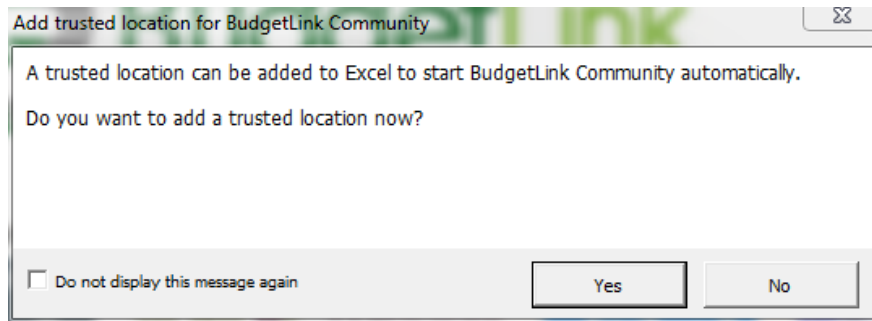
A welcome window will appear



- Tick the "I accept the terms and conditions..." box (or read the licence agreement)
- Click the 'New Installation' button

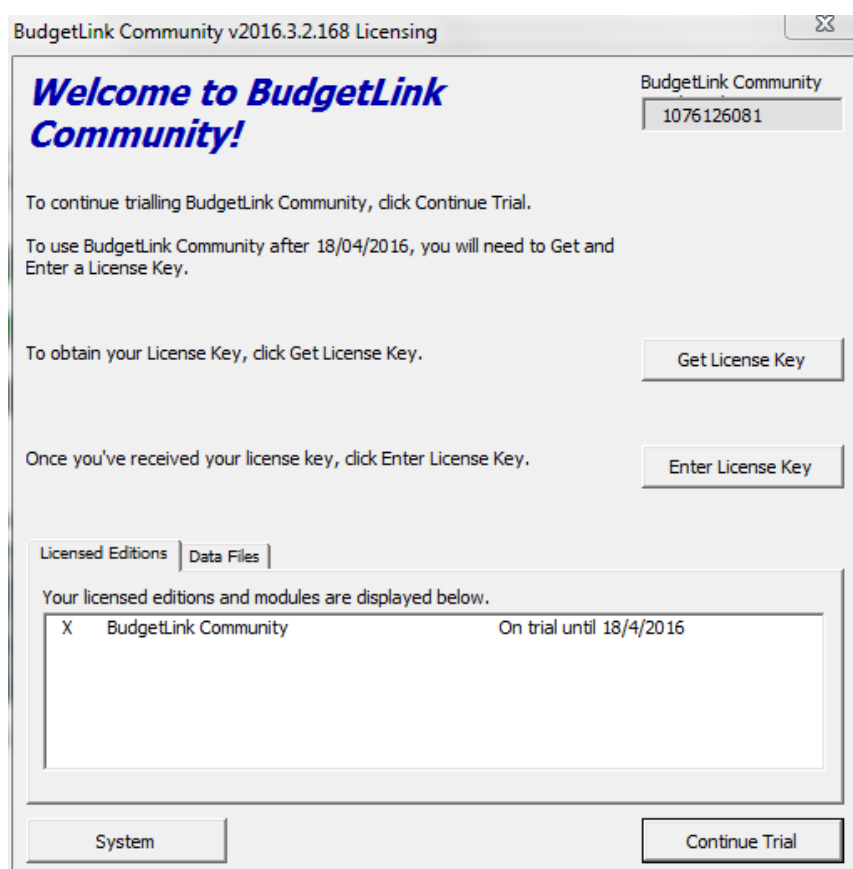
Clicking the "getting started guide" button will open a link to the Accounting Addons general "BudgetLink" help site, which can be useful but will include functionality you will not yet be familiar with unless you have used BudgetLink previously.

A "Add trusted location" window will appear



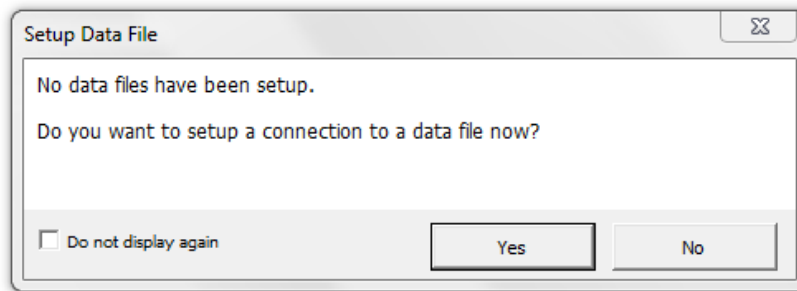
- Click the 'No' button

A Trial window will appear



- Click the 'Continue Trial' button to continue on a trial licence (available until the date shown)
- Or...
- Enter a licence key via the 'Enter Licence Key' button if you have received a key
- Or...
- Request a licence key and continue using the trial version

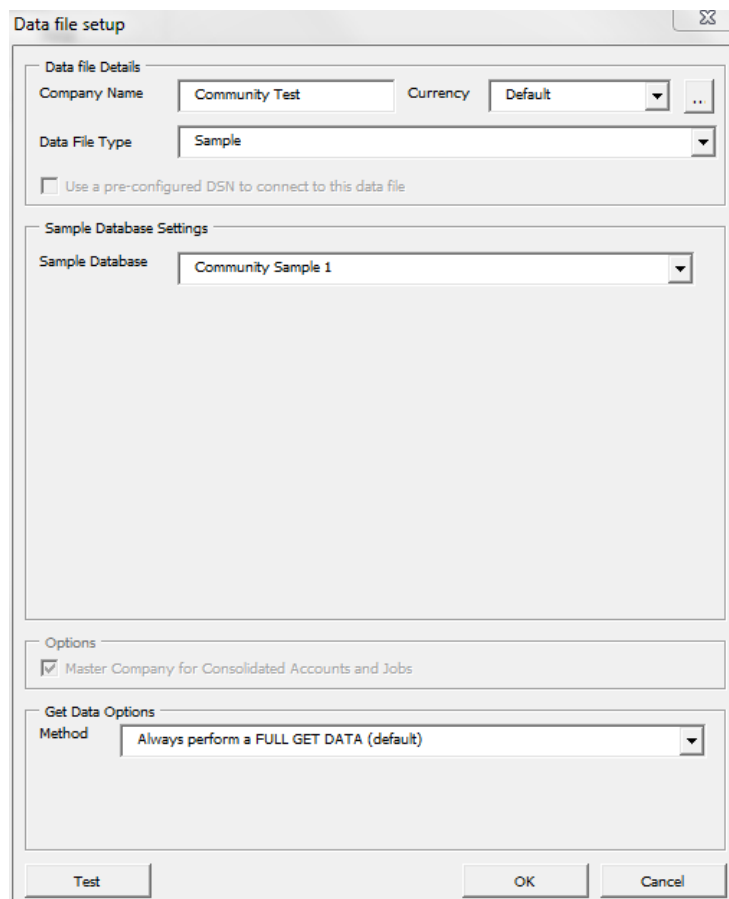
A 'Setup Data File' window will appear



- Click the 'Yes' button

The 'Data file setup' window will appear

The following window refers to use of the sample data file, which is recommended for trialling the software. (If you wish to connect to your own software data file, move to the next step)



- Type any name you choose for the file in the 'Company Name' box
- Select 'Sample' from the 'Data file type' drop down box
- Select 'Community Sample 1' from the 'Sample database' drop down box
- Click the 'OK' button

If you choose to use your own accounting software file...



**Data file setup**

**Data file Details**

Company Name:  Currency:  ..

Data File Type:

☐ Use a pre-configured DSN to connect to this data file

**MYOB Data File Settings**

Data File Path:

User Name:

Password:

Network Protocol:  Use TCP/IP unless advised otherwise.

ODBC Driver:

**Options**

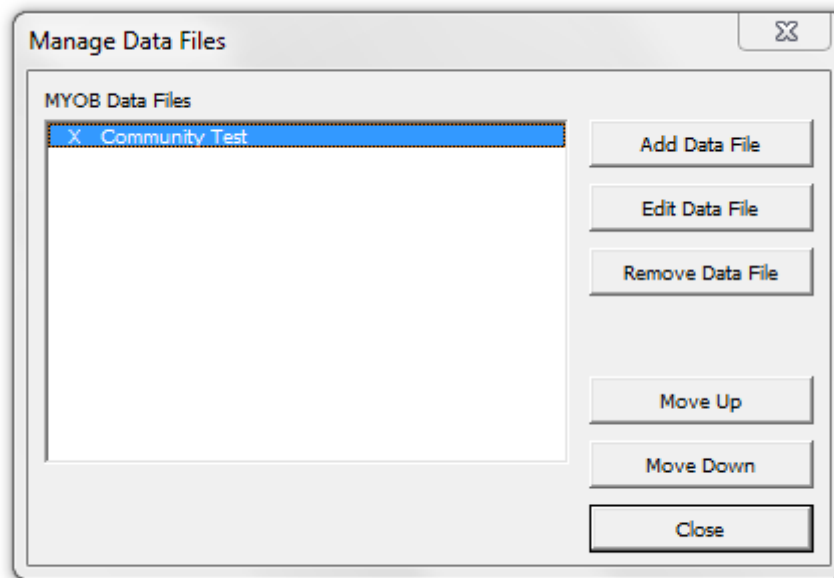
☒ Master Company for Consolidated Accounts and Jobs

**Get Data Options**

Method:

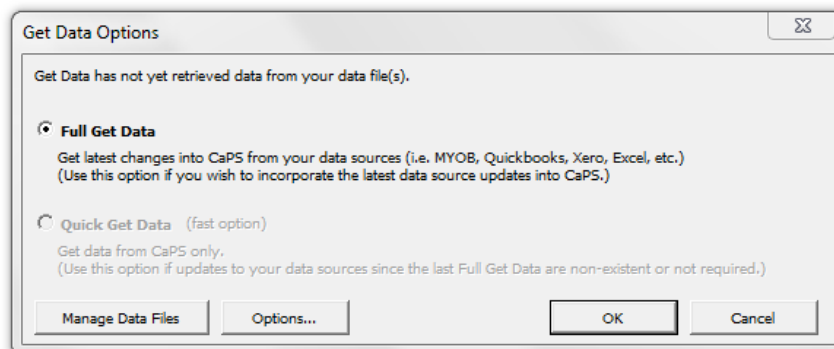
- Type your Organisation's name in a form you'd like to appear on reports in the 'Company Name' box
- Select your software type from the 'Data file type' drop down box
- Browse to your file location from the "Data File Path" box
- Set the user name and password used in your software
- You can choose to test the connection by clicking the "Test" button
- Click the "Ok" button

The 'Manage Data Files' window will appear, with your file name on the list



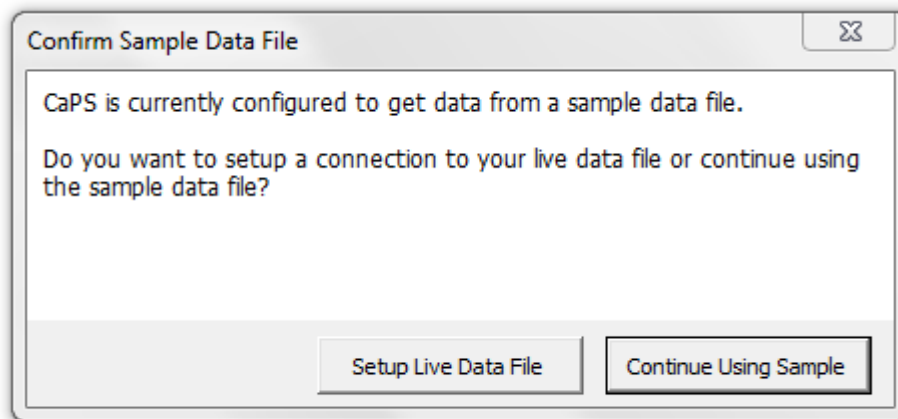
- Click the 'Close' button

The 'Get Data Options' window will appear, with the 'Full Get Data' radio button highlighted



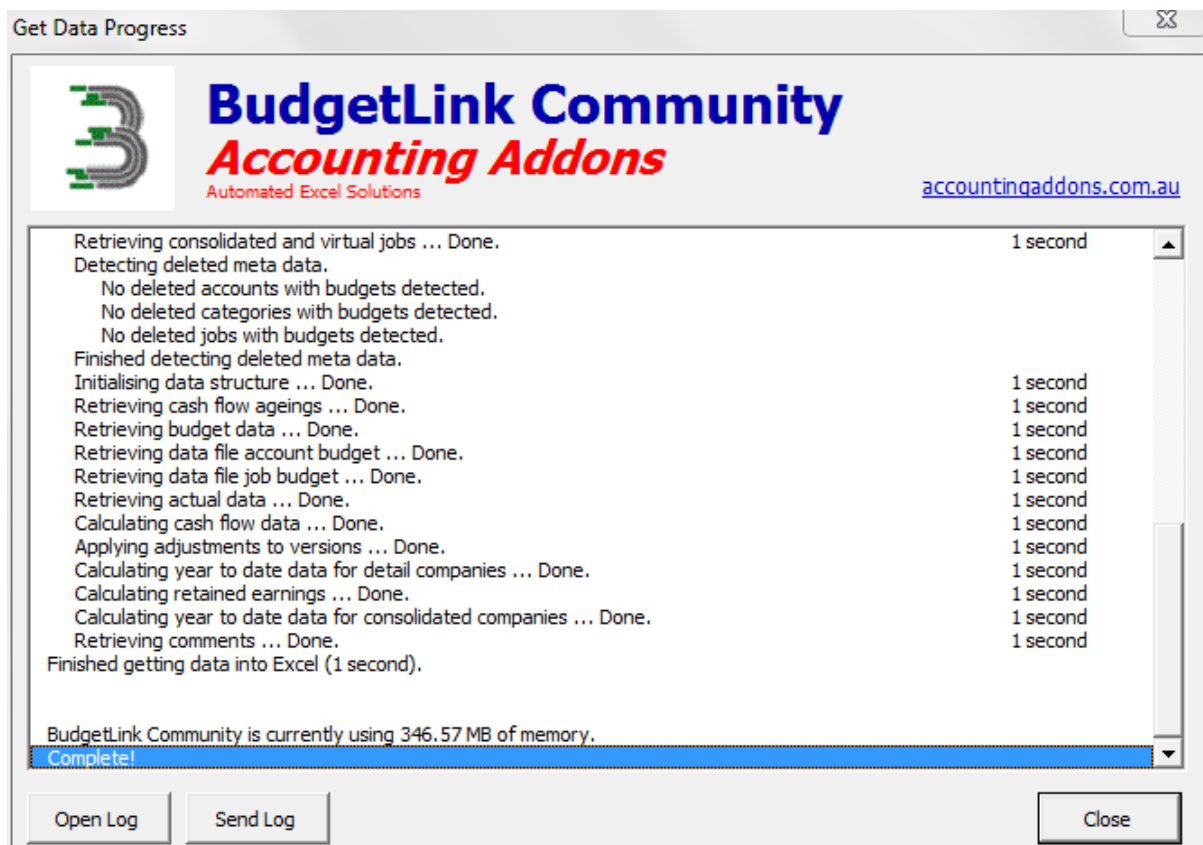
- 
- Click the 'OK' button

If you are using the sample file you may see a 'Confirm Sample Data File' window



- Click 'Continue using Sample' button

A "Get Data Progress" window will appear



- After you see the "complete!" message as above, click the 'Close' button

The software should now be ready for use.