



**TOPS** *Professional*  
*Installation Guide*



# Disclaimer

This guide has been provided by TOPS Software, as a reference and help tool for installing and using TOPS Professional. Illustrations used in this guide may display screens with modules, features and or functions that may not be part of the basic system but available as add-ons or plug-ins as an interface to third party products.

It is neither the intent nor purpose of TOPS Software, to provide accounting advice. For specific information regarding accounting setup, speak to your company accountant or contact the appropriate Federal or State agency.

It is assumed that the user of this guide is familiar with basic Windows functionality and navigation tools. Refer questions regarding the use of Windows to your system administrator.

Every effort has been made to ensure the information contained in this document is accurate and up to date. TOPS Software cannot guarantee that changes to the software after the release of this guide will not affect the applicability of the information in this manual.

Unless otherwise noted, the example companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted herein are fictitious, and no association with any real company, organization, product domain name, e-mail address, logo, person, place, or event is intended or should be inferred. Without limiting the rights under copyright, no part of this document may be reproduced, stored in, or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical photocopying, recording, or otherwise), or for any purpose, without the express written permission of TOPS Software.

The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

© 2016 - TOPS Software

*TOPS Professional®*, *TOPS iQ®*, *TOPS iMail®* and *TOPS GO!®* are registered trademarks of TOPS Software, LLC. All rights are reserved.

# Contents

- Disclaimer ..... 2
- Contents ..... 3
- System Requirements..... 4
  - Recommended System (Hardware) ..... 4
  - Operating System and Memory ..... 4
  - Hard Disk Space..... 4
- Network Configuration ..... 5
  - Local Area Network (LAN) ..... 5
  - Peer to Peer Network ..... 5
  - Remote Access Network..... 5
- Best Practices ..... 6
  - Installation Recommendations..... 6
  - Network Administrator Recommendations ..... 6
- Installation ..... 7
- Starting TOPS Professional ..... 15
  - Help Resources..... 16
  - Corporate Office: ..... 17
  - Sales & Support Office:..... 17

# System Requirements

## Recommended System (Hardware)

For best performance, use:

- 3.0GHz dual core processor
- 20% of total Hard Drive
- 4GB RAM or higher
- Windows 7 Professional, Windows 8 Professional, Windows 8.1 Professional or Windows 10 Professional
- Windows Server 2008, Windows Server 2008 R2 or Windows Server 2012 R2
- Broadband Internet connection (Cable,T1,T3...)
- Gigabit Network (as opposed to wireless networks\*)

*\* Please note: We do not recommend running TOPS over a wireless connection due to the fact that it may cause unpredictable results or data loss from potential network drops.*

## Operating System and Memory

TOPS Supports These Operating Systems	
Workstations	Windows 7, Windows 8, Windows 8.1 or Windows 10 (Professional and Ultimate Editions only)
Servers	Windows Server 2008, Windows Server 2008 R2, Windows Server 2012 R2

Operating System	Memory Requirement	Recommended Memory
Windows 7, 8, 8.1, 10	4GB	8GB
Windows Server 2008, 2008 R2, 2012 R2	4GB	8GB

*Customers running with a low amount of memory will likely experience slowdown when accessing large files and accessing data files over a network. TOPS Software highly recommends that you install the recommended amount of memory to accommodate both the software and your operating system. TOPS Software claims no responsibility for slowdown due to insufficient resources.*

## Hard Disk Space

- **To Install Program:** Allow approximately 1GB Free Space.

*\* Storage requirements will vary depending on billing cycles, file attachments, number of monthly transactions posted and saving various types of attachments within the communities.*

# Network Configuration

Networking in TOPS works in much the same manner as the standard configuration, except it allows more than one user to work in the program at the same time. The number of users allowed is determined by the number of user licenses you purchase with the software.

## Local Area Network (LAN)

Standard network configuration requires loading TOPS Professional separately on each workstation in the network with all the community data being stored on the network server. A data path connects each workstation to the server so TOPS Professional knows where to find the data files for each community on the server.

If your users are going to run TOPS from their workstations with a mapped letter drive to the share on this server, they'll only need to be LOCAL ADMINISTRATORS on the workstations, but will always require full read/write access to the share on the server.

After you've completed installation on a workstation that will have a mapped letter drive to the share on the server, open TOPS, Select an Existing Community, open Administration, Set Community Data Path, and type in your mapped letter drive.

## Peer to Peer Network

In a peer-to-peer network, workstations connect directly with other workstations to exchange information. We recommend that you select one system in the network to perform as a pseudo-server.

Be sure to share the TOPS directory, giving full read/write permissions to all users.

## Remote Access Network

In a remote server setup, users can connect to the server over the Internet from outside of the network. TOPS is then run on the machine inside the network. In this way, users can connect from anywhere, but the integrity of the internal network remains intact. This setup is typically used in larger organizations with a number of employees simultaneously connecting to TOPS. TOPS strongly recommends a dedicated network administrator to manage your remote environment. We support the software, but we will not provide support for your remote network.

If your users are going to remotely connect to a server to run TOPS, they need to be LOCAL ADMINISTRATORS on the remote machine.

*\* Due to the use of .NET Framework, TOPS Professional™ no longer supports a 'Client Install' option. All workstations must be running a full local installation of the software*

# Best Practices

## Installation Recommendations

For best results, please follow these guidelines when installing TOPS Professional:

- Always log in as the domain administrator to install the software. If you are not using domains, install as Local Administrator.
- Turn off User Account Controls (UACs) prior to installing the software:
  - Login as administrator
  - Go to Control Panel and select User Accounts
  - Disable User Account Controls, or move the slider to Never Notify.
  - Restart the computer.
- Set the display DPI to 100% to insure that all buttons and settings are visible.
  - Login as administrator
  - Go to Control Panel and select Display
  - Set the value to 100% (smaller)
- Install TOPS to the root of a local drive. (C:\TOPSSoft)
- We recommend disabling any antivirus/spyware real-time scanning software during installation of TOPS.

## Network Administrator Recommendations

To insure that TOPS Professional runs optimally in your network environment, we recommend you follow these guidelines on a continuing basis:

- TOPS Users should be setup as Administrators on their local workstation. Restricted user accounts can impact the functionality of TOPS Professional.
- It's best to set antivirus exclusions for the TOPS directory locally as well as the mapped letter drive for the share if applicable.
- Make sure outbound ports 80, 20, and 21 are open in the firewall, as TOPS uses these ports to communicate for websites, Internet Backup Service, and TOPS Launcher Updates.
- It's helpful to whitelist the TOPS IP Address 199.72.33.99 in the firewall for updates.
- Make sure that TOPS.NMSRV.COM is white listed, and port 587 has outbound access. This is used by the TOPS iMail program.
- Always back up the TOPSSoft directory in its entirety - backing up a single community file will result in incomplete data due to global functions.
- Don't use "*public/web/free email*" when using TOPS iMail. Use your own email domain and add 204.187.12.93 into the SPF record.

# Installation

Turn on your computer. Close any programs that may have started.

To install TOPS Professional you will have received an email that contains a .zip file which you will need to extract onto your system. To extract the files click on the link in your email and click on "Save". After the files have finished extracting, go to the directory where the files are located.

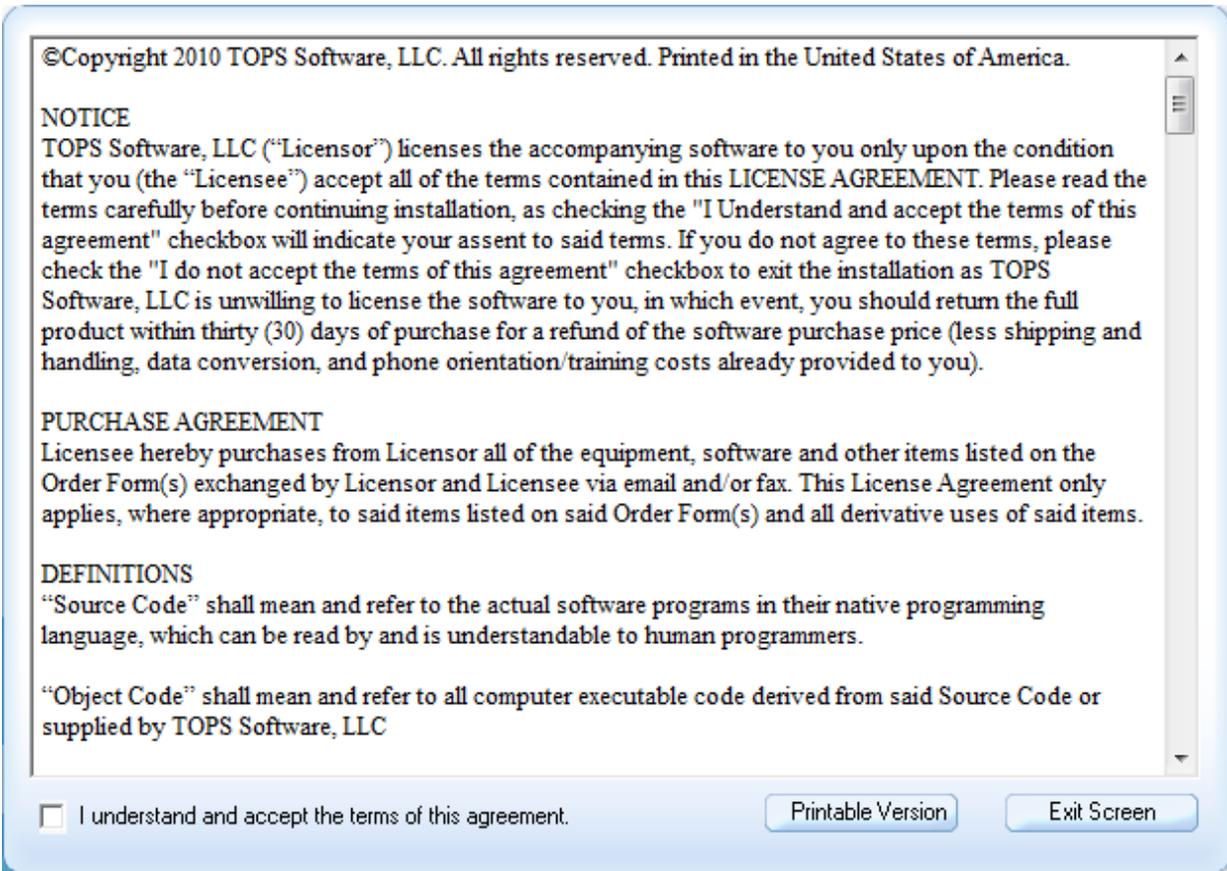
Open the folder "TOPS\_FILES/CurrentInstallCD" and click on Autorun.exe. The following window will open:



Click on the option "Install TOPS".

The TOPS Professional license agreement appears next. Please review the terms of this agreement. You must understand and accept the terms of this agreement before you can proceed with the installation of TOPS Professional. If you are unsure or have any questions regarding this agreement please contact your TOPS Software Account Manager.

Begin the Installation.



1. Click the check box **I understand and accept the terms of this agreement** to continue with your installation of TOPS Professional. Once you check this box, the **Exit Screen** button will change to **Install TOPS**.
2. Click **Install TOPS**.



**Thank you for choosing TOPS Software. This program will help walk you through the TOPS installation.**

It is strongly recommended that you exit all Windows programs before running this Install program.

Click CANCEL to quit Install and close any programs you have running. Click NEXT to continue with the Install procedure.

**WARNING:**

This program is protected by copyright law and international treaties.

Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.

Click the NEXT button to begin the installation process.



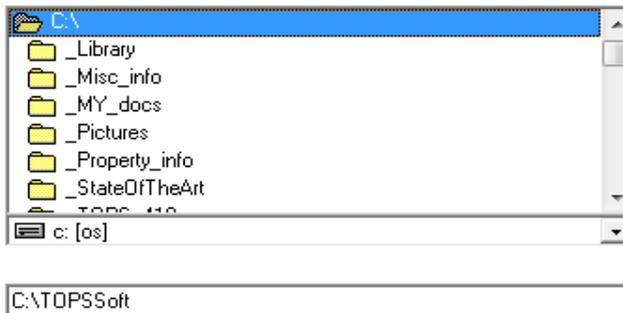
Installation and Setup

Step 1 of 4

3. Click **Next** to proceed.



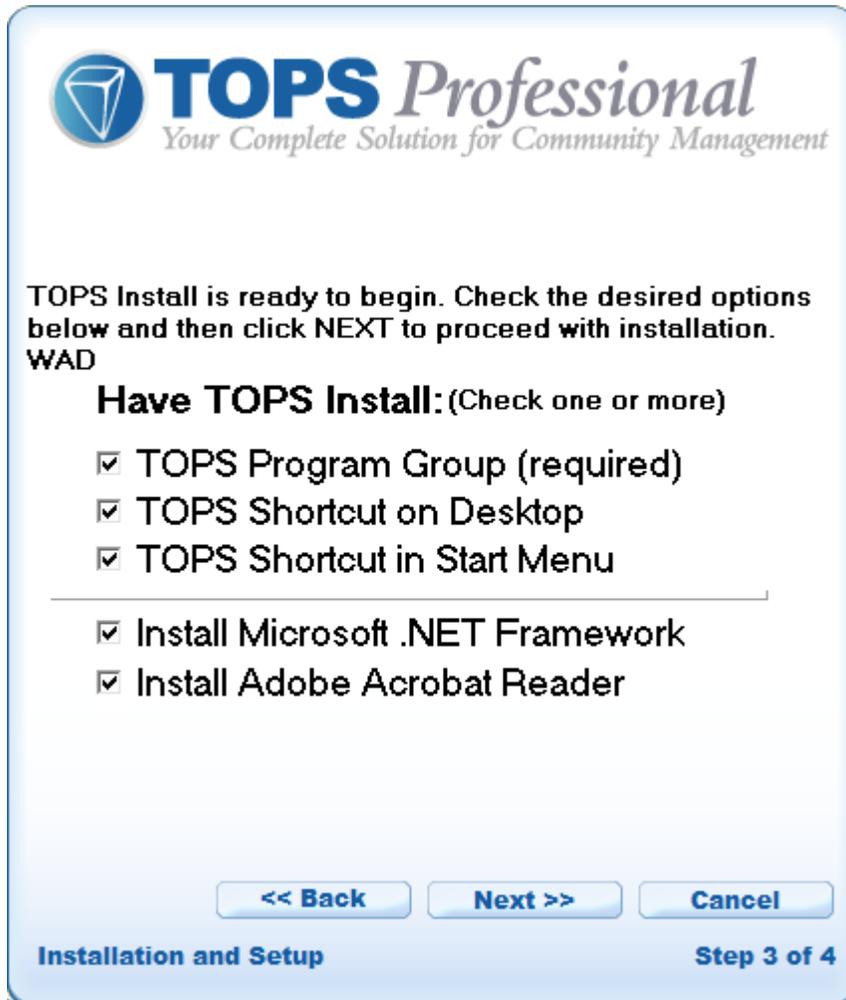
**Please choose the directory where TOPS will be installed. Then click the Next button.**



Installation and Setup

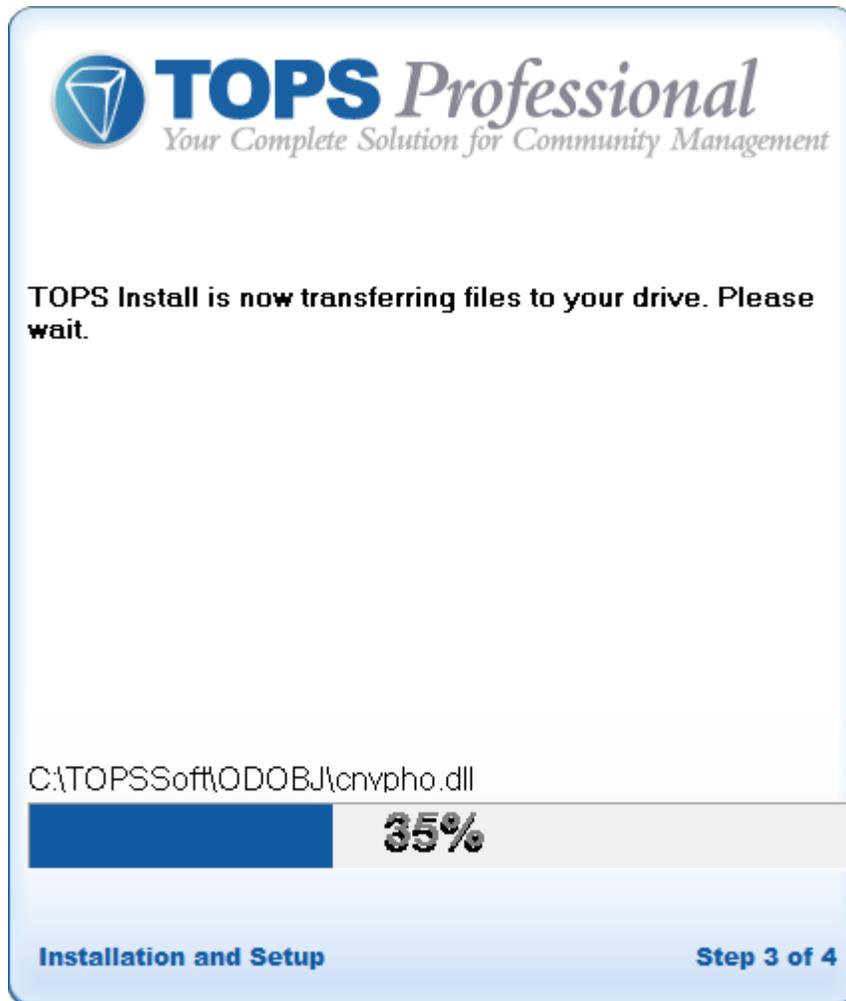
Step 2 of 4

4. TOPS Setup will set the installation path to **C:\TOPSSoft** by default. You may accept this location (strongly recommended), or change the directory installation path to one of your choosing.
5. Click **Next** to proceed.
6. Select how you wish to start TOPS Professional.



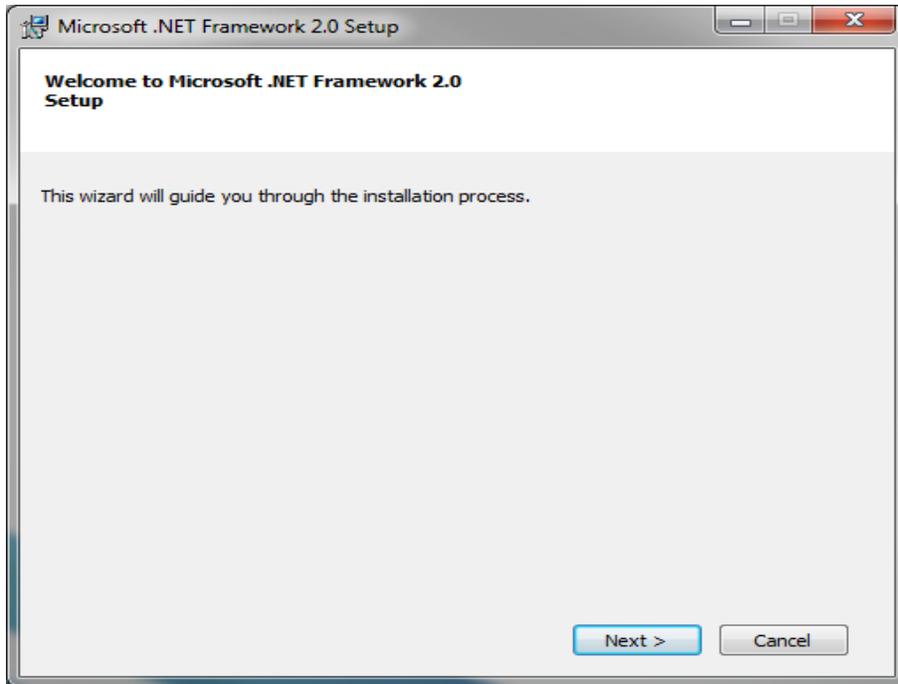
- **TOPS Program Group** - the programs will be loaded into their own program group under the Windows® Start Menu. You cannot disable this choice.
- **TOPS Shortcut on Desktop** - places a shortcut for TOPS Professional on the Windows® Desktop.
- **TOPS Shortcut in Start Menu** - this places an icon for opening TOPS Professional on the Start Menu.
- **Install Microsoft .NET Framework** - .NET is necessary for many TOPS Professional features to function. Most current systems come with the framework pre-installed, but if you are installing on an older system, you will need to run this option.
- **Install Adobe Acrobat Reader** - This software is used to open documents in the .PDF format.

7. Click **Next** to proceed with the installation.

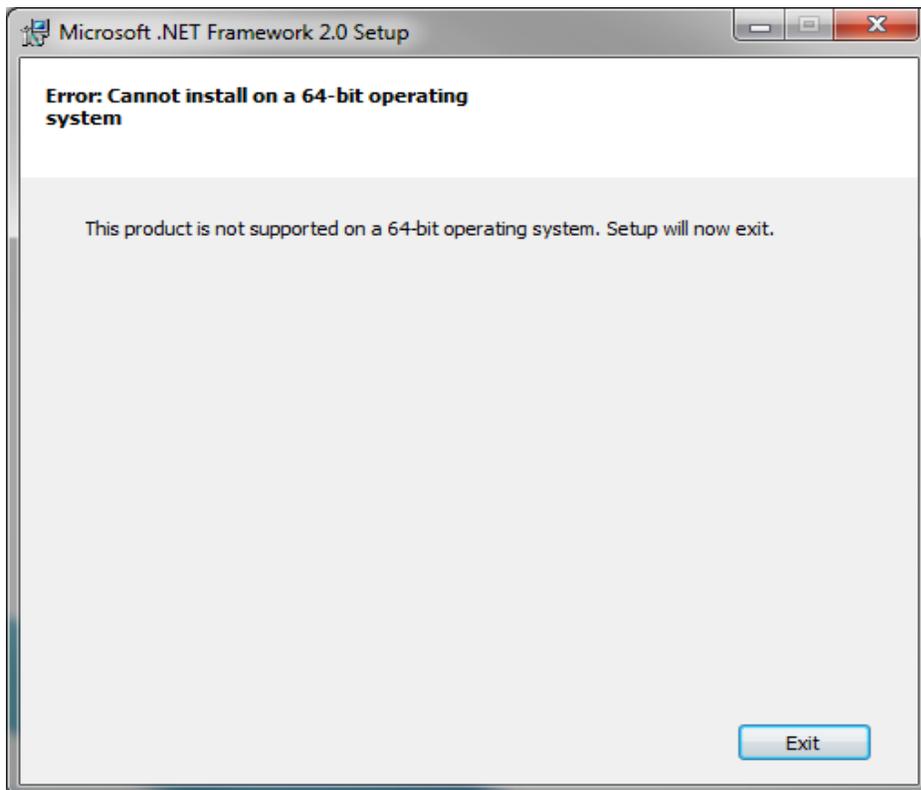


When all the files have been copied, the TOPS Professional installation is complete. You may proceed to the setup of the Microsoft .NET Framework and the Adobe Acrobat Reader installation if you do not currently have those set up. The Microsoft .NET Framework is required for certain portions of the TOPS Professional program to run; a PDF reader such as Adobe Acrobat Reader is required to view the PDF user manuals and saved communications within the program.

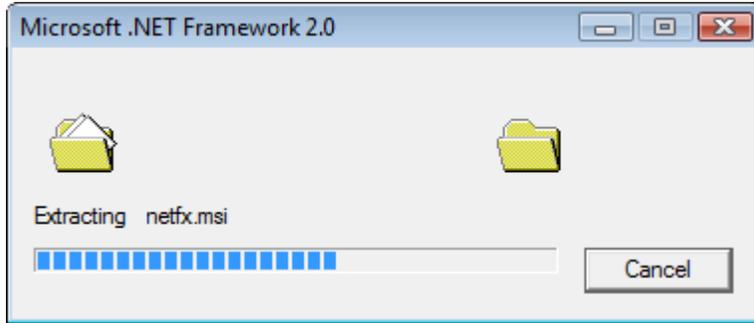
8. If you previously checked the option “Install Microsoft .NET Framework” the following window will display.



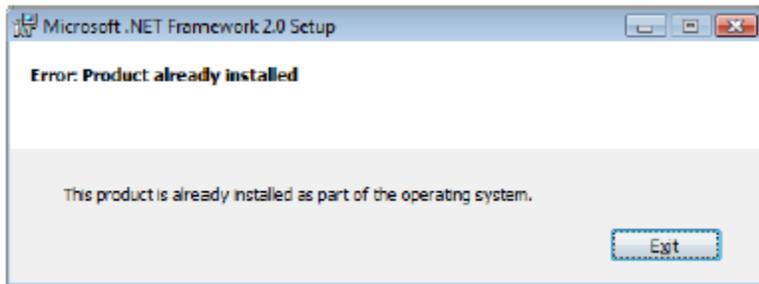
If you are running on a 64bit system, this version of Microsoft .NET Framework will not install and the following screen will display. When you log in to TOPS for the first time, it will install Microsoft .NET Framework automatically.



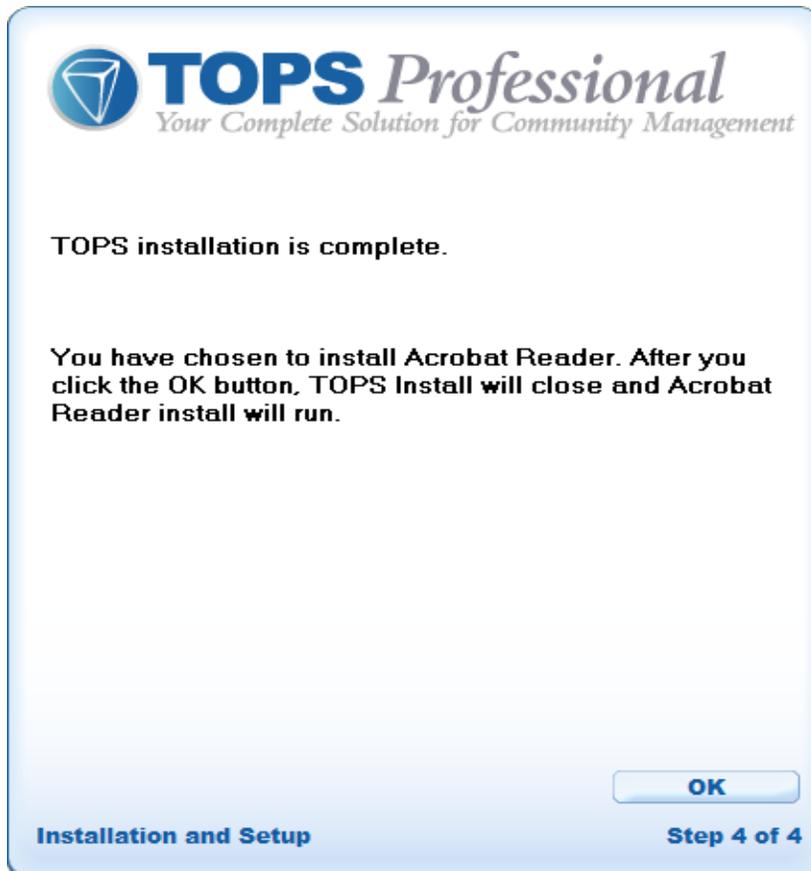
9. Click on Next to proceed (if you did not see the above Error message). Microsoft .NET Framework 2.0 will now install.



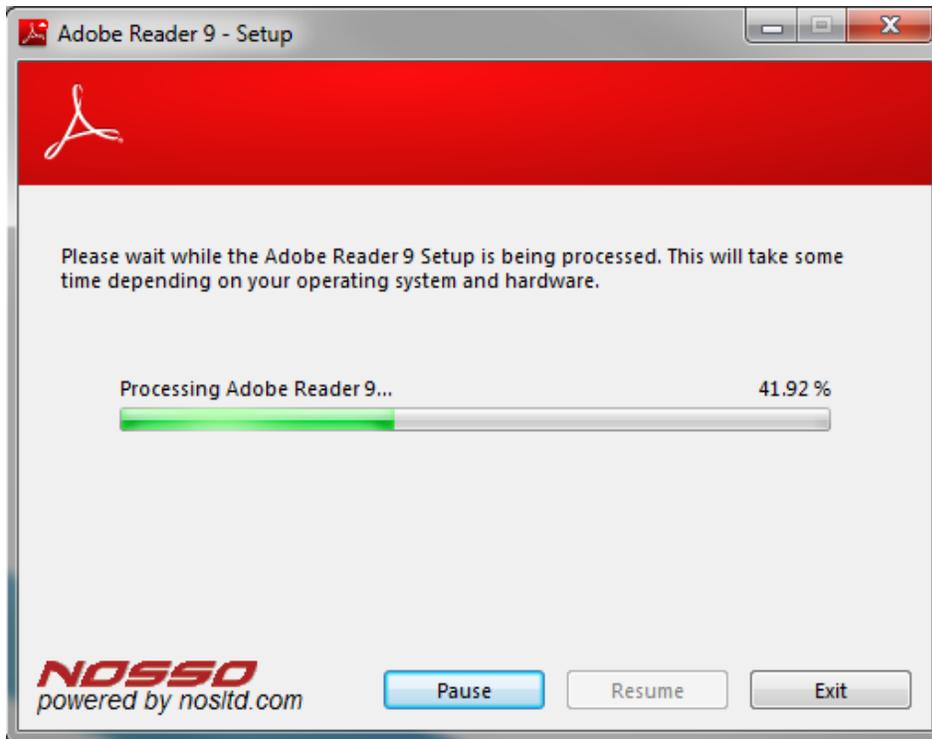
10. If you have already installed the Microsoft .NET Framework, the following screen will be displayed instead. Click **Exit**.



11. Once the .NET Framework install is complete, the following window will appear. If you elected to install Adobe Acrobat, the installation will run to complete the process.



12. Click **OK**.



13. The Adobe Acrobat Reader installation will complete and then close itself and take you back to the TOPS autorun window.

14. Click **Exit Back to Windows**.

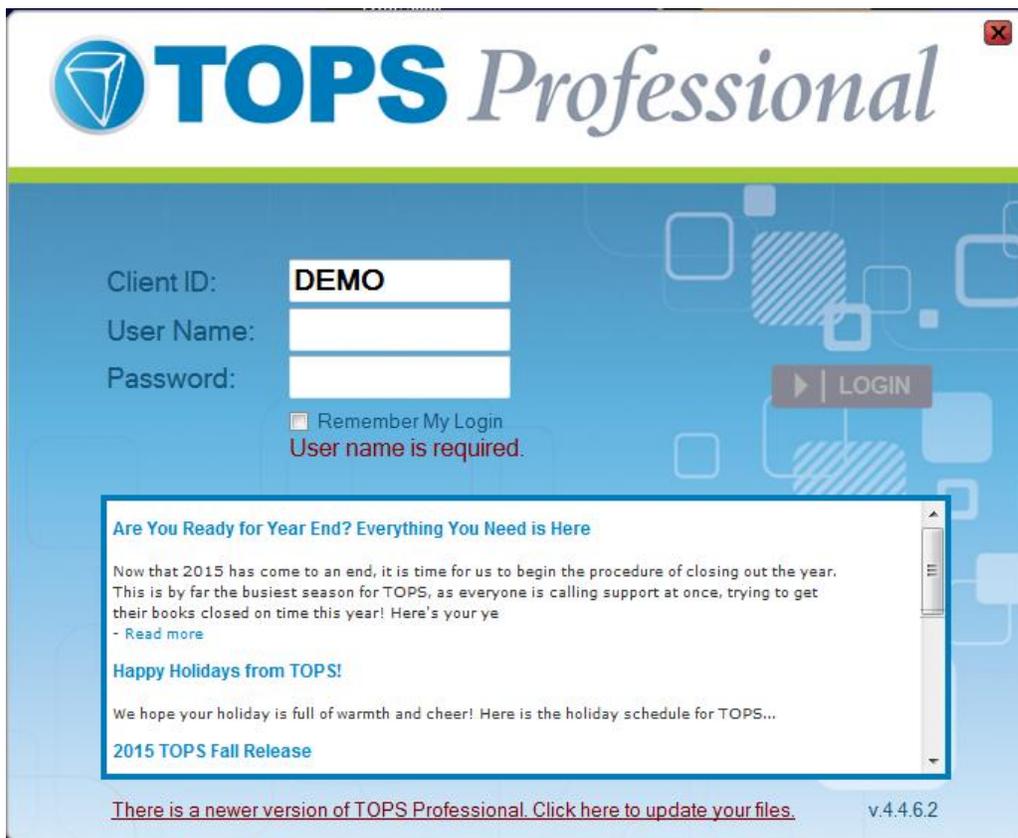
15. Your installation is now complete.

# Starting TOPS Professional

1. When you first install TOPS Professional the installation client ID default is DEMO, however, it is recommended that you enter the client ID that was assigned to you. The Sample Community has been included with TOPS Professional to help get you familiar with using the application.
2. Start TOPS Professional by double-clicking the TOPS icon located on your Windows desktop.

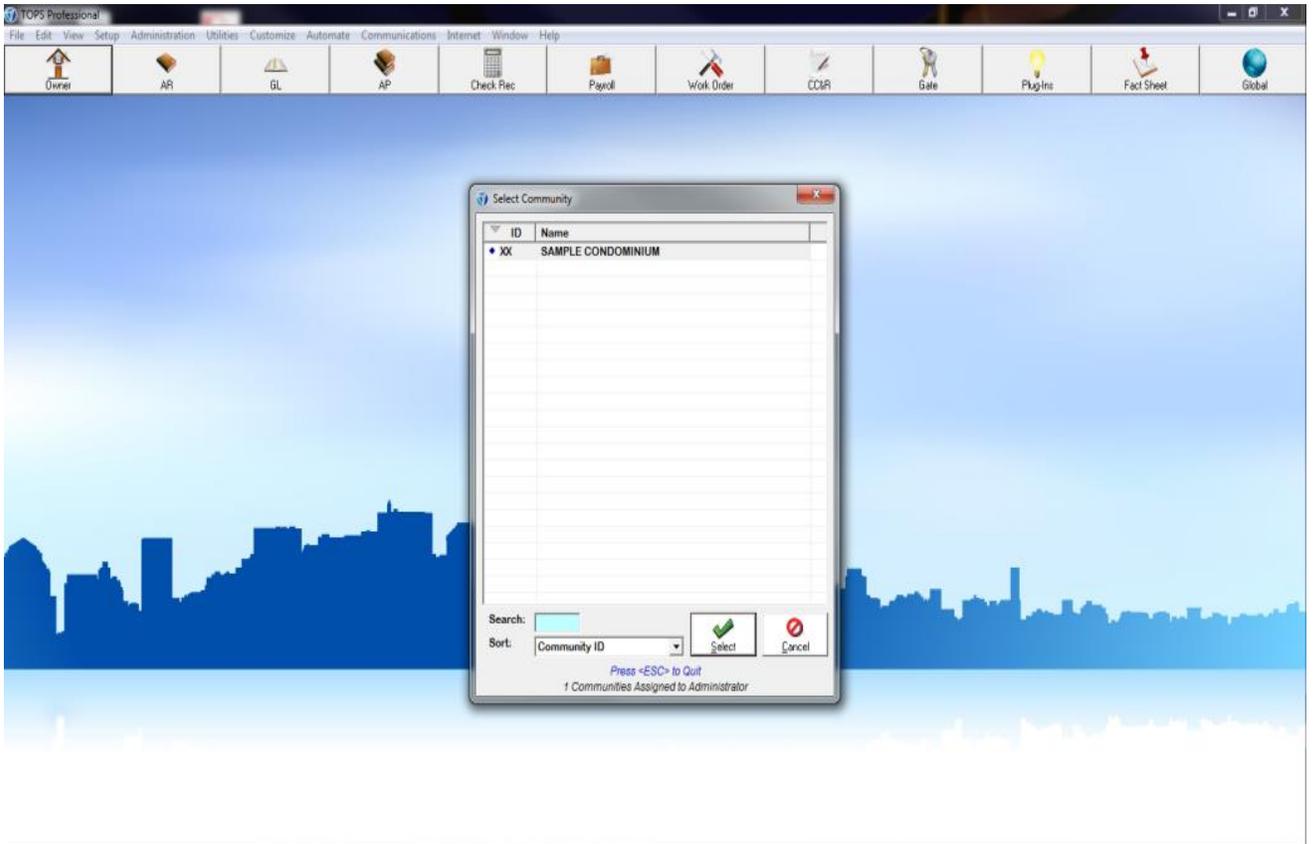


3. The TOPS Professional window will display. Before logging in for the first time, you will need to run the TOPS Pro Launcher updates to bring your installation up to date with the latest file versions.



4. On the login window, change the client id **DEMO** to the client ID you were given when you purchased TOPS Professional. You can find this on your TOPS Agreement and TOPS invoice.
5. Enter User Name: **Admin** and Password: **Admin**.
6. Click on: [There is a newer version of TOPS Professional. Click here to update your files.](#)
7. The latest files are now downloaded and you can log into TOPS by selecting "LOGIN".

8. The TOPS main program window will open with the Sample Community in the Community Selector list.



9. Double click on the Sample Community name. You are now logged into TOPS Professional.
10. Begin working with TOPS Professional!

We encourage you to click and discover the many incredible features built into TOPS Professional by exploring the Sample Community provided with the program. Some of the features built into the program, such as Calendar and Phone Messenger, will only work if users and passwords are set up. To create users, click on the Administration menu, then choose Users/Passwords. Make sure the first user created is an administrator and is given access to all communities that have been set up in the system.

## Help Resources

TOPS Professional provides several Help tools. When you are logged in to TOPS Professional you will find a Help feature on the Main menu. Additional resources are available from the TOPS Customer Care Center at:

<http://www.topsoft.com/cc/GettingStarted.aspx>

### **Corporate Office:**

364-C Christopher Avenue

Gaithersburg, MD 20879

### **Sales & Support Office:**

2495 Enterprise Road #201

Clearwater, FL 33763

Sales: 800.760.9966

Support: 800.899.5689

[www.TOPSSoft.com](http://www.TOPSSoft.com)

