MasterMine for QuoteWerks Installation and Getting Started

Installing MasterMine for QuoteWerks

In Brief:

- Install to workstation or terminal server
- Download installer from www.mastermine.net
- Turn off all Excel and log into QuoteWerks as intended MasterMine user
- Launch the installer and answer prompts (usually defaults)
- Test-run MasterMine, click "New" or "Create". Enter SQL credentials and MasterMine license when prompted.
- Launch MasterMine thereafter either from Windows Program menu, desktop shortcut, or QuoteWerks menu (managed in QuoteWerks).

System Requirements:

1. Microsoft Excel (Office 2007 or higher, with all service packs) must be installed on the workstation or terminal server prior to installing MasterMine.

2. MasterMine for QuoteWerks works with Windows XP or higher, including Windows 10.

Detailed Installation Instructions:

MasterMine typically installs to your local workstation (the same machine as your QuoteWerks node and MSOffice, to which it supplies an add-in). See below for terminal services installations.

INSTALL PREPARATION

1. If you have the SQL version of QuoteWerks, you will need SQL credentials to complete the installation. The credentials may be read-only or full-access.

2. Make sure you have all Office Service Packs installed for the version you are running. You may want to launch Excel on the local machine to be sure there are no Excel issues that need resolution BEFORE attempting to install MasterMine. Make sure Excel's macro security is not set to the highest level ("Disable All Macros").

3. **Exit Excel** before beginning the installation.

4. Download MasterMine from the website if you have not already: www.mastermine.net
   Save the downloaded file to your workstation.

5. Log into QuoteWerks as any level of user (not necessarily admin) prior to installing MasterMine.

BASIC INSTALL

1. Run the MasterMine for QuoteWerks installer with Windows Admin privileges (right click the downloaded installer and choose "Run as Administrator").

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2. Install as you would any windows 32-bit application to the Program Files (on 32-bit Windows) or (x86) Program Files folder (on 64-bit Windows).

3. Test-Run MasterMine by checking the box at the end of the installation process that says "Run MasterMine", or by running it from the Programs menu in Windows.

Note: If you have multiple QuoteWerks nodes installed, the first time you run MasterMine you may see an Error Message that gives instructions for managing this situation using the QuoteWerks component "QWLaunch.exe". Follow the instructions carefully.

4. In the "Launch", click the menu item for "New" or "Create" to create a new MasterMine report. (SQL-based QuoteWerks only: A dialog will come up requiring SQL credentials at this point. This should occur only once)

5. Further help with any installation issues can be found in our online knowledgebase at www.mastermine.net under "Support". Call toll-free 877-877-7212 or (international) 651-917-5010 if you have taken the steps above and your install does not behave as expected.

SETTING UP MASTERMINE LAUNCH WITHIN QUOTEWERKS:

You can set up menu items in QuoteWerks and manage them for all QuoteWerks users centrally, under an administrative user's profile. For a full step-by-step description, go to MasterMine's "Help" menu and click "Launch from QuoteWerks".

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