



Pre youGrow Installation Checklist for MYOB RetailManager

Applies to: Outlook 2000 Outlook 2002 Outlook 2003 Outlook 2007

There are a number of issues that must be checked prior to installing **youGROW** for RetailManager. Please use the following as a Checklist:

Client: _____ Date: ____/____/____

Issue	Checked - Comments
1. Check to see that Office Version is 2000 or above – youGROW will not work with earlier versions of Office.	
2. Same version of Outlook, Word and Excel. (Open each programme, go to Help About, to see the version.) If both versions are not the same, mail merge will not work. You will need to upgrade your version of Office to include same versions of Outlook, Word, and Excel.	
3. If using Office 2000 mail merge to email will not retain HTML formatting. I.e., mail merge emails will only be sent in plain text format – you cannot include graphics (eg logo), different fonts, email signature or colours. You may wish to upgrade to later version of Office to have this functionality, although all other functionality remains.	
4. If using Office 2000, you cannot edit your hyperlinks in an email merge – you can only show the full URL – you can't change it to "Click Here".	
5. If using Office 2000 or 2002, will need to ensure all updates are installed – in particular Word Update of April 2002. (See details under the "Issues and Problems" section on the Microsoft Website for download links.) If this update is not installed, hyperlinks in merged emails will not be active when sent.	
6. Check if using Exchange Server. If not, contacts cannot be shared except through importing and exporting (YOUGROW details will not be retained, only standard Outlook fields.) See section on Importing & Exporting in Training Notes. Note that we do not install YOUGROW to an Exchange Public Folder – only to a personal contacts folder.	

Issue	Checked - Comments
<p>7. Existing Data check. Bad data in means bad data out. Any existing data will need to be checked and cleaned where required. It is usually easiest for you to export the data to Excel, and clean up in Excel, then import the data back. We do not take responsibility for bad data, but can assist with cleansing at additional cost if required. Instructions for cleaning a RetailManager database to be provided prior to installation.</p>	
<p>8. Importing Data: The standard install of Microsoft Office does not include the importing of ODBC (Open Database Connectivity) files. If you receive an error message when trying to import an Excel or .txt file into Outlook "Microsoft Office Outlook cannot start the required translator. This feature is not currently installed. Would you like to install it now?" you need to click "Yes", and have your original Office disks available. Simply insert the disk 1 into your CD Rom drive, click Yes, and follow the prompts.</p>	
<p>9. Where you are collecting customer data – in particular email addresses, then you need to be aware of the Unsolicited Electronic Messages Act 2007, to come into effect 5/8/2007 in New Zealand. (See: http://www.legislation.govt.nz/browse_vw.asp?content-set=pal_statutes)</p> <p>We recommend that all users construct a one page "Privacy Statement" for display instore, should a customer request to see this, also to reassure customers that you will not share their data with other organisations for marketing purposes.</p>	
<p>10. Any existing customer data collection forms used at Point of Sale, should include the following at a minimum:</p> <ol style="list-style-type: none"> a. First Name b. Last Name c. Street Address d. Suburb e. State f. Postcode g. Country h. Email address i. Contact Telephone Number <p>A simple sentence explaining that you will not share their data should be included on the form.</p>	

Issue	Checked - Comments
<p>11. A very few ISP's have recently introduced what seems to be an arbitrary limit on the maximum number of emails which can be sent at once. If this applies to your ISP, best when doing mail merge to email, to merge record numbers 1-200, 201-400, 401-600 etc.</p>	
<p>12. If using Norton AntiVirus, this slows sending out emails considerably. We have ran into some problems with mail merge to email over the years with Norton. We recommend using AVG anti-virus.</p>	
<p>13. If you have either network or Microsoft Exchange user privileges, then the Administrator must ensure the user/s on whose PC's youGROW will be installed, have the right to add new software. (Particularly if your IT network is administered externally by your IT firm, this issue must be checked prior to installation. As youGROW is installed directly to individual PC's, those users must have the right – if only temporary – to install to their PC.</p>	
<p>14. Minimum recommended technical specifications: As a rule, if you can run your MYOB product, and Outlook, currently, with no problems, then youGROW will also run comfortably. It takes very little in the way of CPU memory or hard disk usage. The key factor to consider is speed – for both mail merge, and for synchronising. Accordingly, we recommend a minimum of 1 gig RAM, with at least 200 meg free disk space. The faster the operating chip, the faster our key processes will run. We also recommend Windows XP and above. (We have found with Windows Vista as the operating system, that speed is considerably increased with 2 gb RAM – not so much for youGROW, but with everything else you run!)</p>	
<p>15. Must be using either version 6.5 or above of MYOB RetailManager</p>	