
ReadyDoc Client Application Installation Instructions

Redtail Integration

The ReadyDoc Cloud application is available at <https://users.readydoc.com>.

ReadyCapture and *ReadyDoc Control Center* are two desktop-based applications used for capturing documents, viewing documents from within 3rd party applications like *Redtail CRM*, and “helper” functions like uploading large documents in background, and creating “Drop Zones” for dragging and dropping documents from the local workstation to upload to ReadyDoc.

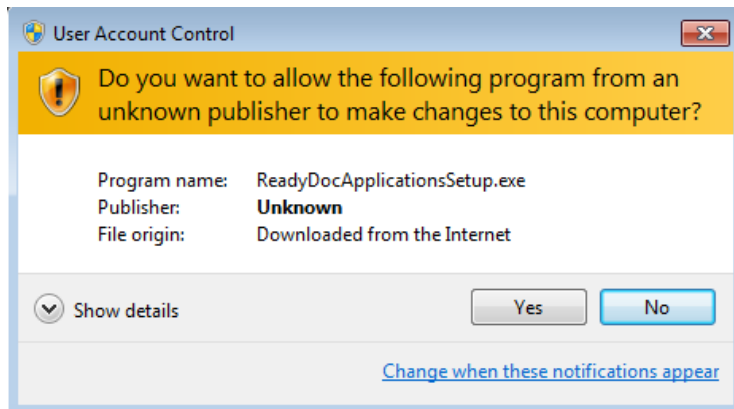
The application installer for ReadyCapture and ReadyDoc Control Center:
<http://users.readydoc.com/Downloads/ReadyDocApplicationsSetup7.exe>

During the install you will need to have your ReadyDoc Client id, as well as your ReadyDoc user name and password.

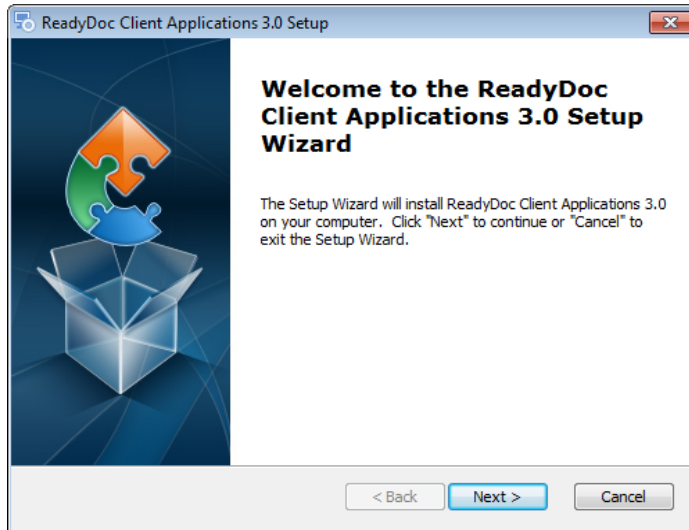
Step by Step Installation Instructions

VERY IMPORTANT: You may need to turn off or pause anti virus applications during the installation - particularly if you are using *Avast* or *AVG* Antivirus applications. If you get warning messages during the install from your antivirus provider and the warning doesn't include the option to "trust" or otherwise exclude our application from scanning, cancel the installation, pause or exit the antivirus, and start the installation again.

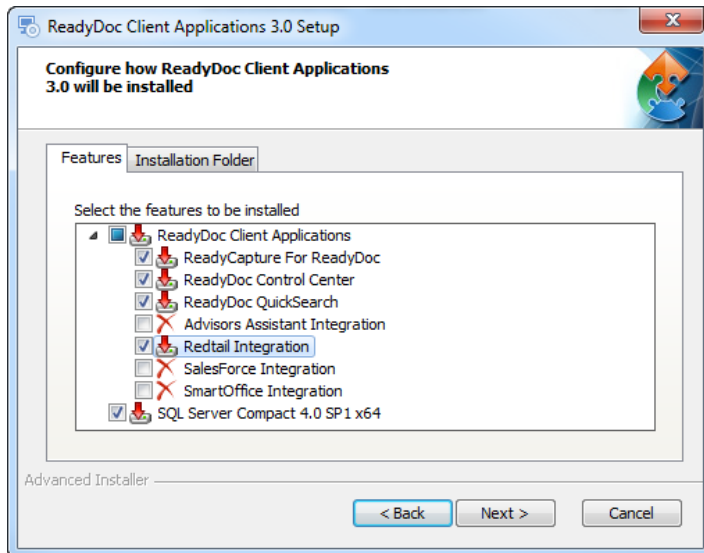
1. Download and save the application installer for ReadyCapture and ReadyDoc Control Center from the location shown above. Start the installation by double-clicking on the ReadyDocApplicationsSetup.exe file.
2. Depending on security settings, the following window may appear. Click Yes to allow the install:



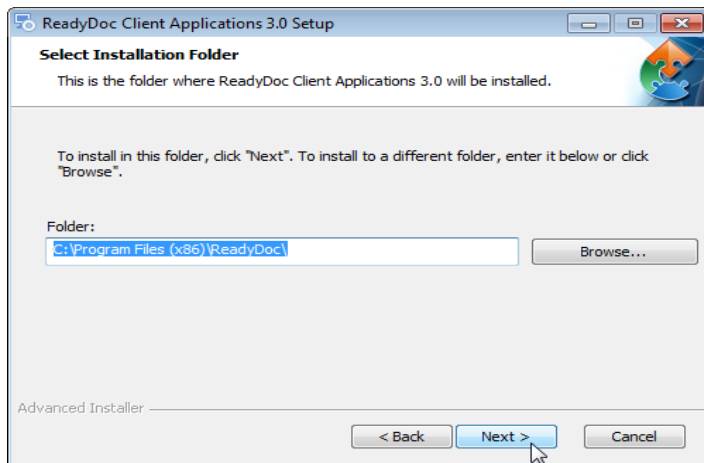
3. At the Welcome to ReadyDoc Client Applications Window, click **Next**.



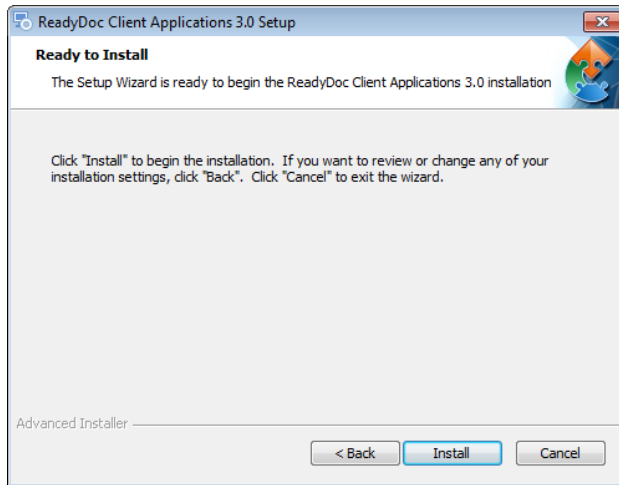
- 4. At the "Configure" window leave all checked options selected, plus select the Redtail Integration option. Then click **Next**.



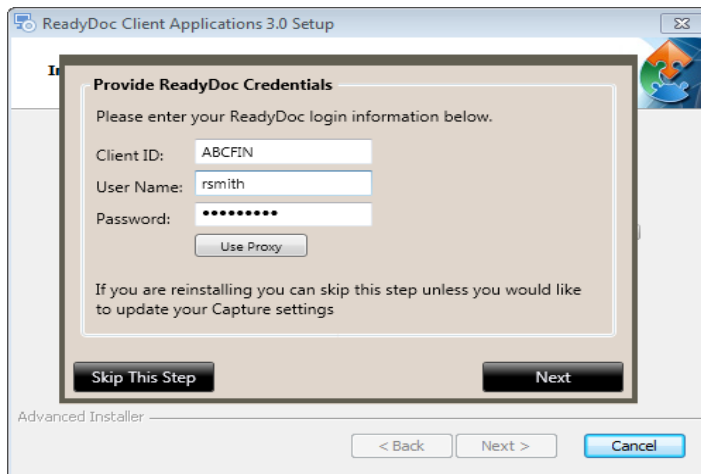
- 5. At the "Select Installation Folder" window click **Next**.



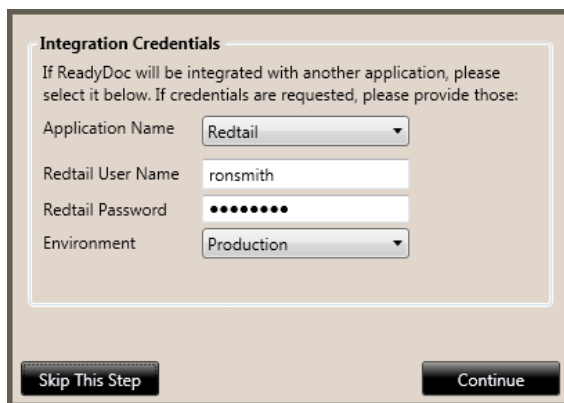
- At the "Ready to Install" window click **Install**.



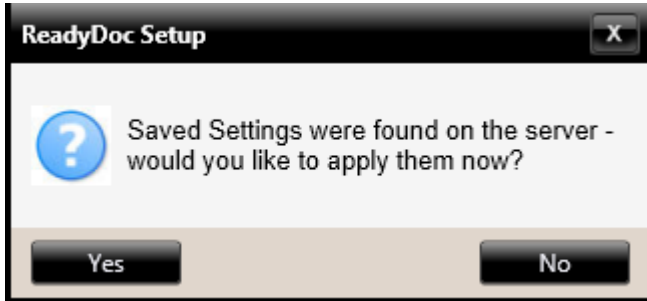
- After a few moments the ReadyDoc Credentials window will appear. Provide your ReadyDoc Client ID, User Name and Password and click **Next**. If your location uses a proxy server to access the internet click the Use Proxy button and fill in your proxy information. Note, the Client ID and User Name are not case-sensitive. The password IS case-sensitive.



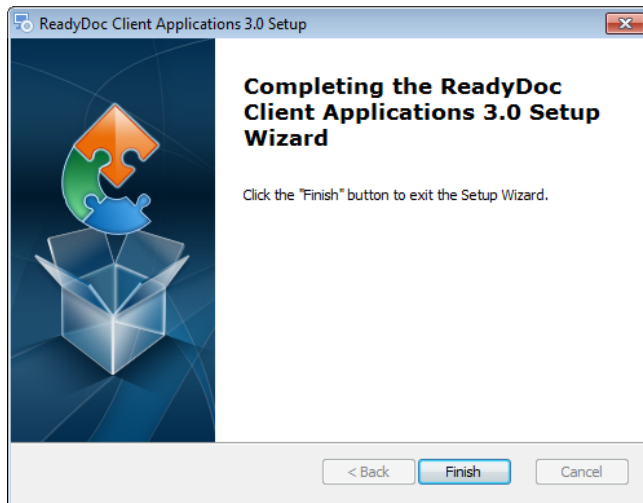
- Next, provide your Redtail credentials. Unless instructed otherwise, leave the Environment setting as "Production". After providing the required values, click **Continue**.



9. The installer will check the ReadyDoc server to see if there are any saved settings for your office. Saved settings include the preferred Index Card in ReadyDoc, configuration options with integrated applications and other settings that are common to your office. If saved settings exist, click **Yes** to apply them.



10. At the Completing the ReadyDoc Client Applications window, click **Finish** to complete the installation.



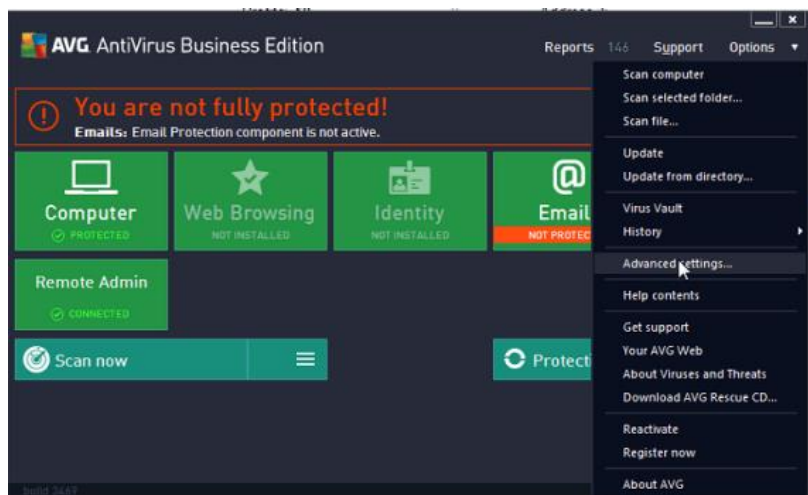
Depending on your anti-virus application, and especially if you are using *Advisors Assistant* in conjunction with *ReadyCapture*, you may also need to add exceptions within your anti-virus application upon completion of the install. If you are using AVG or Avast anti-virus applications, it is a certainty that you will need to add these exceptions.

Please see next page for instructions for adding exceptions to AVG Antivirus

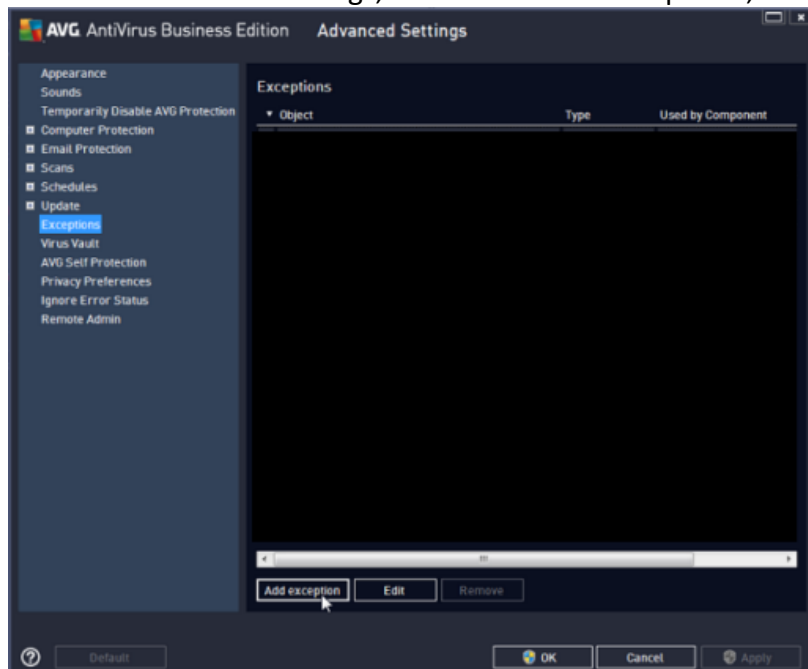
1. Launch the antivirus console application from the notifications area via the application icon in the notifications area (lower right of the monitor window) - right click on the icon and select the options to "Manage" or "Settings" - the name of the options differs with AVG versions.

The Anti-virus main console should display - AVG Antivirus Business Edition is shown below but other AVG versions are similar.

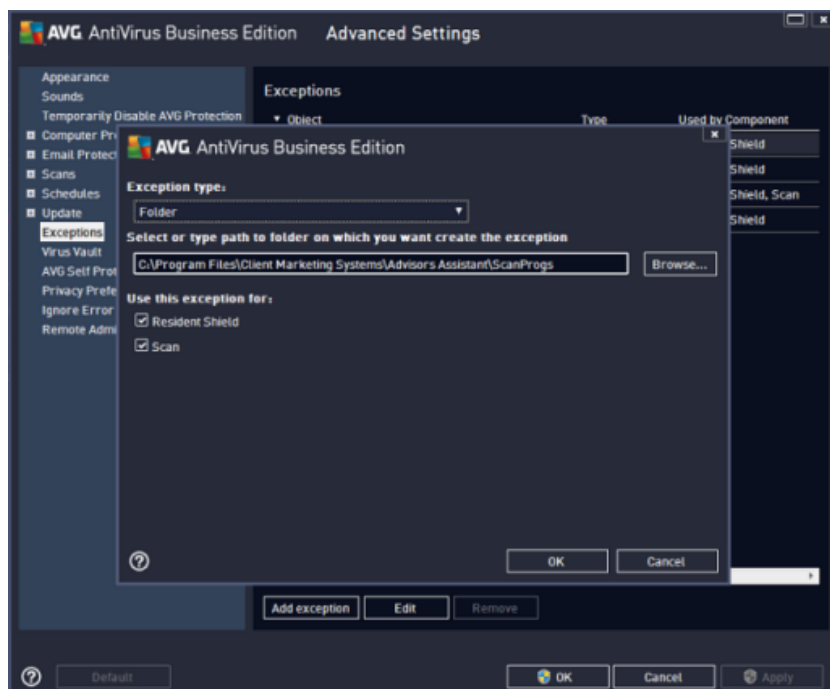
2. Click on Advanced Settings as shown below.



3. On the Advanced Settings, window click on Exceptions, then Add Exception as shown below:



4. In the Exceptions window, select Exception Type = **Folder** and browse to and select the path *C:\Program Files (x86)\Client Marketing Systems\Advisors Assistant\ScanProgs*, or for 32-bit operating systems the path is *C:\Program Files\Client Marketing Systems\Advisors Assistant\ScanProgs*. Be sure to check both the Resident Shield and Scan check boxes and click **OK**



5. Repeat the above steps to add another FOLDER exception for the path *C:\Program Files (x86)\ReadyDoc\ReadyCapture for ReadyDoc* -- for 32-bit systems this location will be *C:\Program Files\ReadyDoc\ReadyCapture for ReadyDoc*