Sage XRT Business Exchange
version 12.00

Setup Guide

sage

Contents

Guidelines

This document describes how to install **Sage XRT Business Exchange** version 12.00.

We recommend you install the following applications in this order:

- **Sage XRT Bank Format Library**
- **Sage XRT Common Services**
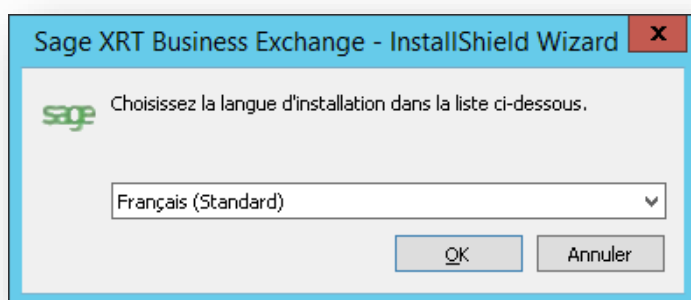- **Sage XRT Business Exchange**

Make sure you closed all applications before starting this installation.
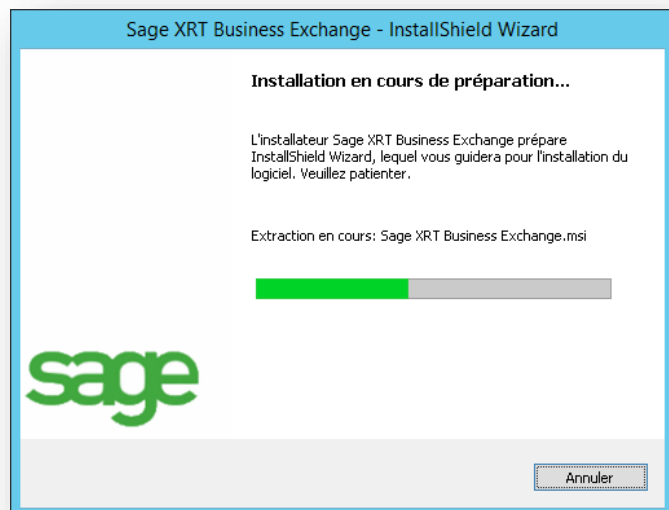
First installation

To install **Sage XRT Business Exchange** version 12.00, you first need to install **Sage Bank Format Library** and **Sage XRT Common Services**, for more info, refer to these applications guides.

Once you are done with both applications, please follow the procedure below.

1. Go to **Products\SAGE Business Exchange** directory and run the setup file. The progression status window is displayed.

2. Select the language for the installation of **Sage XRT Business Exchange**. Click **OK**.
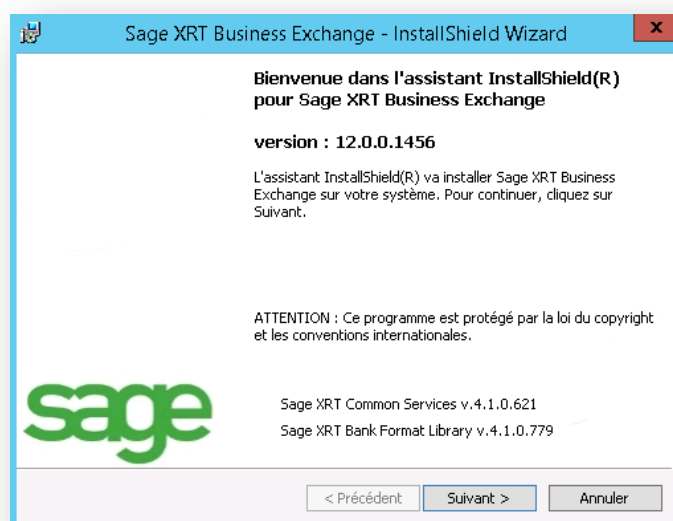
3. In the **Sage XRT Business Exchange Installation** window, click **Next**.

Click **Cancel** to abort the installation process at any time.

The next window recaps the update to install as well as your current version of **Sage XRT Common Services**.

Click **Next**.

4. Read the **License Contract**, and confirm the agreement by selecting **I accept the terms of this license contract**. Click **Next** to start the main installation.

5. Specify the **User Name**, **Organization**, and **Serial number** fields as mentioned in the license file.

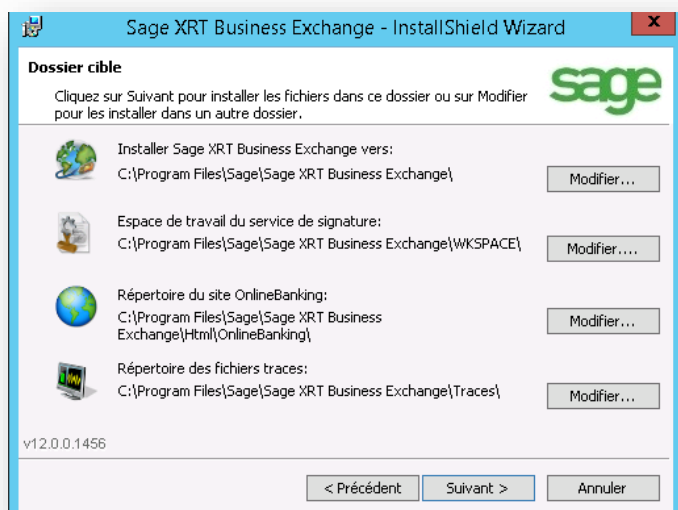   These data correspond to the **Sage XRT Business Exchange** options purchased.

   Click **Next**.

   ⚠ Between the **Only for me** and **All Users** options, we recommend you choose the second one.

In the **Destination Folder** window, you can modify folders for **Sage XRT Business Exchange** installation, the Signature Service workspace, the **Online Banking** site installation and log files.
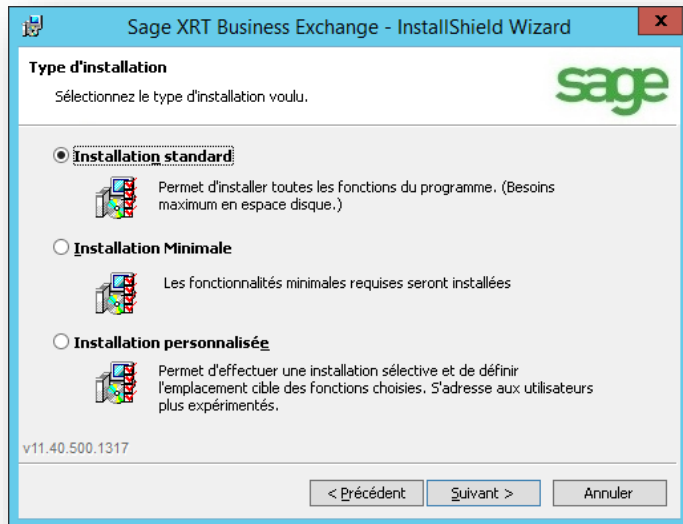

6. To choose another folder, click **Modify**. Otherwise, go to the next step.

    In the **Folder Name** field, enter the installation folder path. The **Search...** function enables you to explore folders and quickly find the right folder.

    Once you have selected it, click **OK** to return to the **Destination Folder** window.

    Click **Next**.

7. The **Installation Type** window offers three options.

- The **Basic Installation** only installs **Sage XRT Business Exchange** components without the associated services: this corresponds to the use of a single client station.

- The **Custom Installation** option is suitable for experienced users only.

- The **Installation standard** is recommended as it installs **Sage XRT Business Exchange** components and the associated services altogether.

Click **Next**.

8. In the **Services Configuration** window, you can: **Change the Service Startup Account** and **Use the same account for all Services**. Complete the form if needed and click the **Next** button.
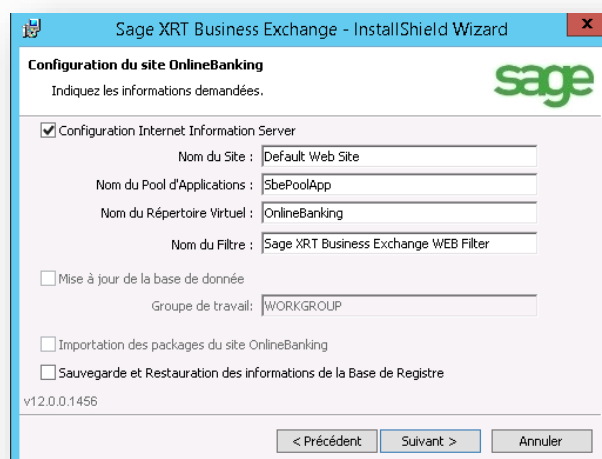
The **Online Banking Site Configuration** window generates the automatic creation of the **Online Banking** site.

9. Select **Configuration Internet Information Server** and click **Next**.

> ⚠ To upgrade from version 11 to version 12, we strongly recommend not to select **Back up and restore** the registry**. This choice actually overwrites all the protocol info set up in the registry.
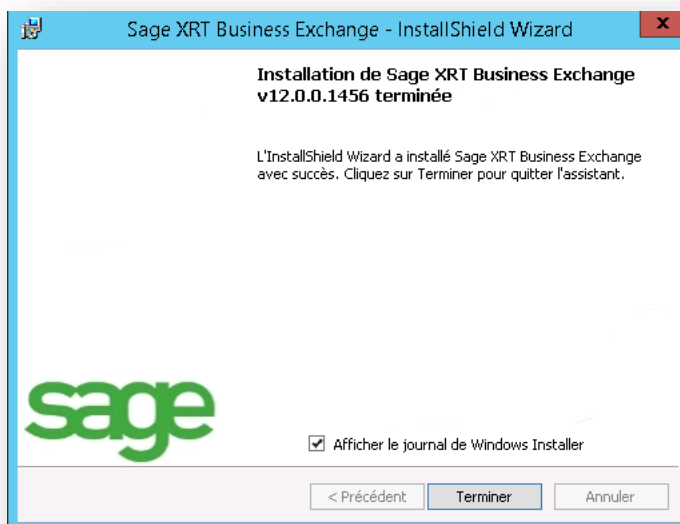
10. If the following window, click the **Install** button.
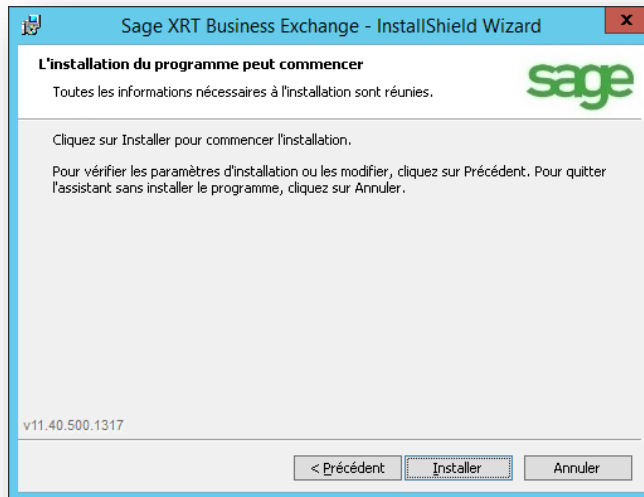
The **Completing the Sage XRT Business Exchange Setup Wizard** window is displayed.

Select the option **Display Windows Installer log** if necessary, and click **Finish** to close the wizard.
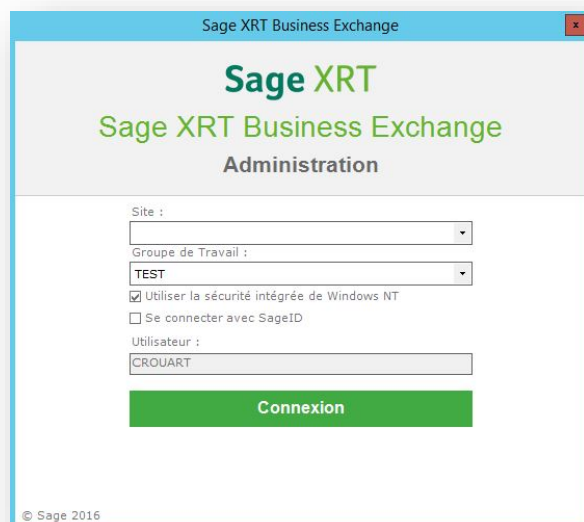
The following message confirms the actual installation of **Sage Business Exchange**.
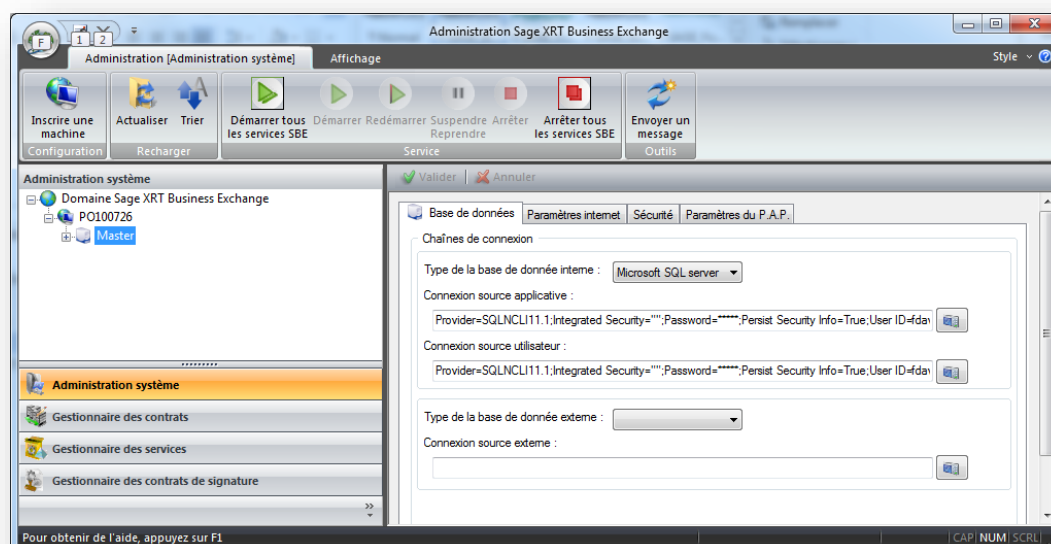
Operation

If using **Sage XRT Business Exchange** for the first time, the data source required to access the application, has to be selected.

From the **Start** menu, go to **All Programs - Sage - Sage XRT Business Exchange - SXBE Administration**.
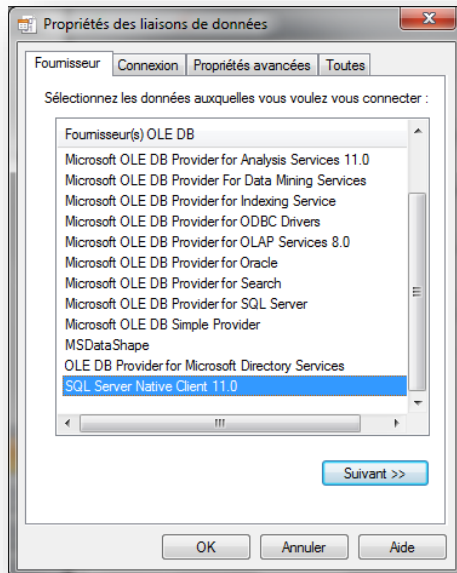

The interface of **Sage XRT Business Exchange Administration** is displayed.
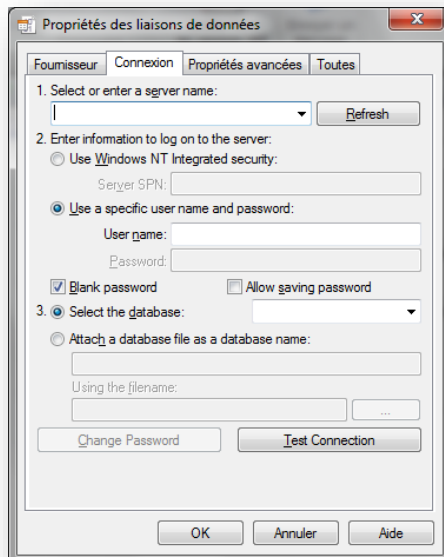
In the **Databases** tab, select the **External Database Type**.

Click **Internal Data Source** and select *SQL* or *Oracle*.

Click **Next** and specify the connection characteristics in the dedicated tab.

Click **OK** to save the data source and repeat this procedure for all other data sources.

Further Information

The installation update from version 11.40 32 bits to version 12 64 bits is not supported. In this specific case, you must uninstall version 11.40 32 bits to install version 12.

Guides dedicated to **Sage XRT Business Exchange** are available from **Start - All Programs - Sage / Sage XRT Business Exchange - Documentation**:

- *User Guide*

- *Error Code Guide*

- *Network Interface Guide*

- *Protocol Guide*

At any time and for all **Sage Business Exchange** modules, you can access our **Online Help Center** with the **F1** key.

For information on how to install and configure **Online Banking**, see the dedicated Installation Guide.