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Version 5 Update Instructions (Updating from V5 2016-2019)

Greetings Tradesmen's Customer:

For Updating Tradesmen's On-Screen 3D Estimator, please follow these steps. Please make sure you have a backup copy of \OS3DE. Tradesmen's Software, Inc. cannot backup your data. If you do not already have a backup system in place, please contact your IT support and implement one right away. If you have no backup, there is nothing to recover from should there be a loss. Tradesmen's Software OS3DE must be closed in order to update.

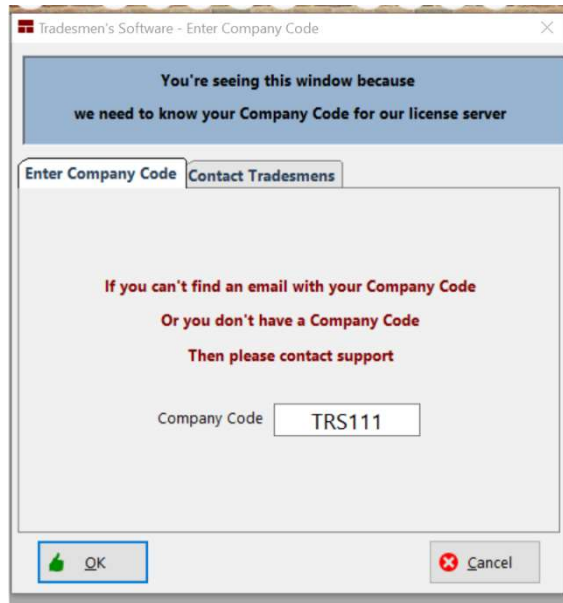
To install the estimating program update from our website, close all open programs and proceed with the following steps:

1. Click on "**Download V5 Setup**" found on <http://tradesmens.com/updates/downloads/>. Select to Save/Download file to your computer.
2. Double Click on the "**Setup_OS3DE.exe**" file and follow the instructions on your screen. We recommend you use the following settings and commands.
 - a. Welcome Screen. Click on "Next".
 - b. License Screen. Read the license agreement and accept the terms. Click on "Next".
 - c. Setup Type. Select "**Upgrade to a new version**" and then click on "Next".
 - d. Destination Folder will default to "C:\TSI\OS3DE". We recommend that you do not change this unless you have previously changed the location for the installation. Click on "Next".
 - e. Ready to Install Screen will verify your settings. Click on "Next".
 - f. Installation of Related Programs. You do not need to check the box for "Install PDF to TIFF" unless you have not previously installed this program.
3. After Installing Version 5, you will need to open the software by double clicking on the Tradesmen's OS3DE icon on your desktop.
4. **The following procedure is for customers that are updating from Version 5 2019 or earlier.** These steps are not applicable if you have already updated/upgraded to the keyless license system. The following is the procedure to enter your specific Company Code and selecting your user license. The Company Code was provided to you at the time of purchase or e-mailed to your company contact.

Company Code _____

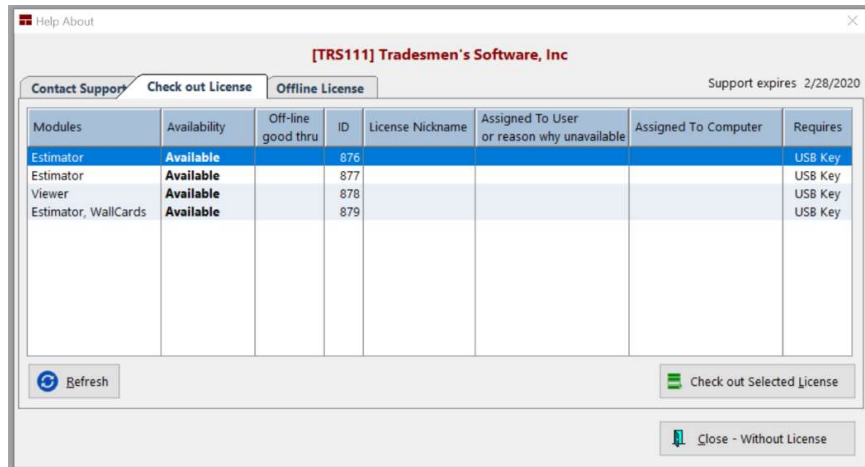
You will need to be connected to the internet to activate. You **will also need to have an existing USB hardware key** plugged in. This will need to happen once with each workstation. After Company Code is entered, click [OK].

Note: TRS111 is an example for this documentation. Make sure to use the Company Code that was provided to you. Please E-mail support@tradesmens.com if you do not know your company code.



You will then see a window with your available licenses. If you have purchased additional modules (Example: Wall Card, IFC Converter), you will see them listed in the Modules column.

Select/Highlight the desired Available license and then click on [Check out Selected License].

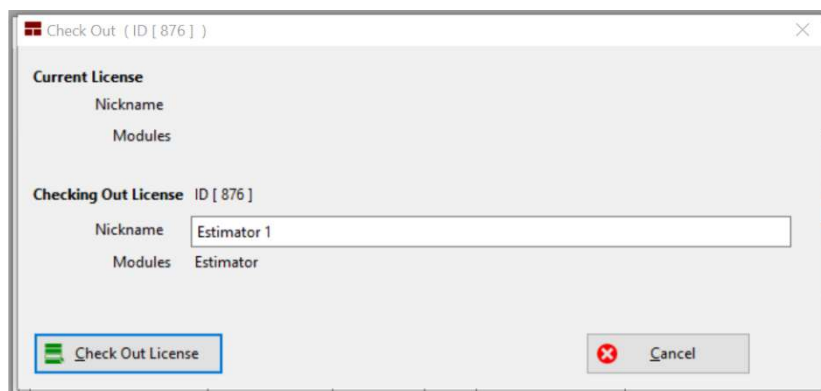


The next screen will give you the option to “Nickname” the license, but it is not required. The “Nickname” option is available if you would like to assign a specific license to a specific user or just want to make it more easily identifiable.

You can put anything you’d like for a nickname, here are some examples:

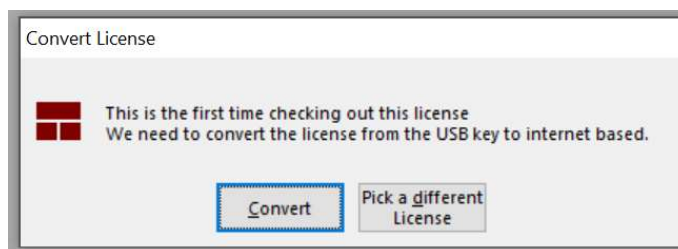
- Estimator 1
- Project Manager
- TSI Viewer
- Bob, Jeff, Steve’s
-

Click on [Check Out License] once you have entered a “Nickname” or have decided to leave it blank.

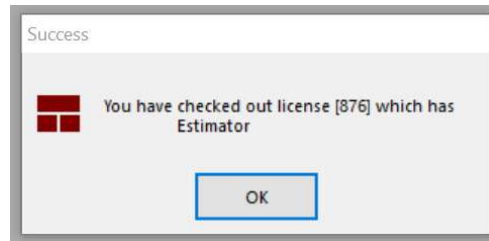


The “Convert License” screen will now appear. Click on the [Convert] button and the USB hardware key/license that you have plugged in will be converted to an on-line license. You will no longer need the USB hardware key to run Version 5.0j or newer.

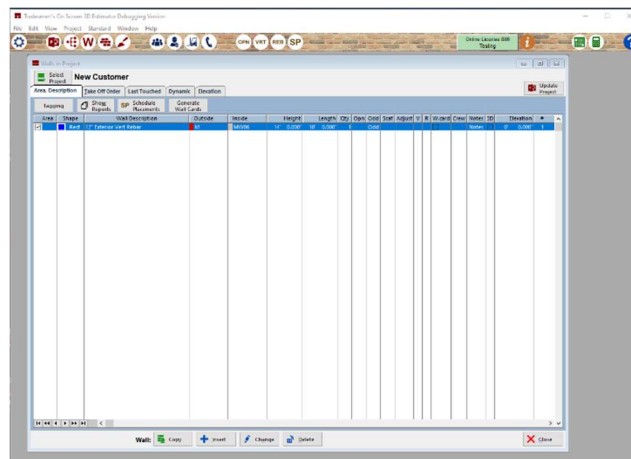
NOTE: The hardware key has now been coded to work strictly for the older 4.1N program. You will still be able to access your older projects/records that are in the 4.1 program.



You will then get a confirmation of “Success”. Click on [OK].

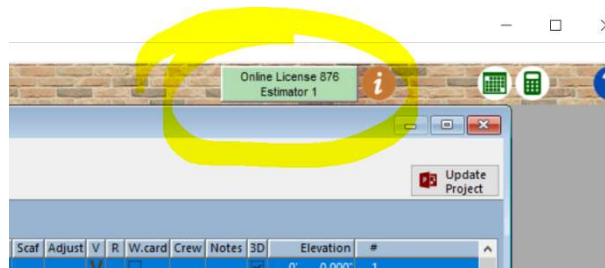


The program will open to the demo project “New Customer”



Closing the program will return the license. Launching the program from the same machine will automatically check out the last successfully checked out license.

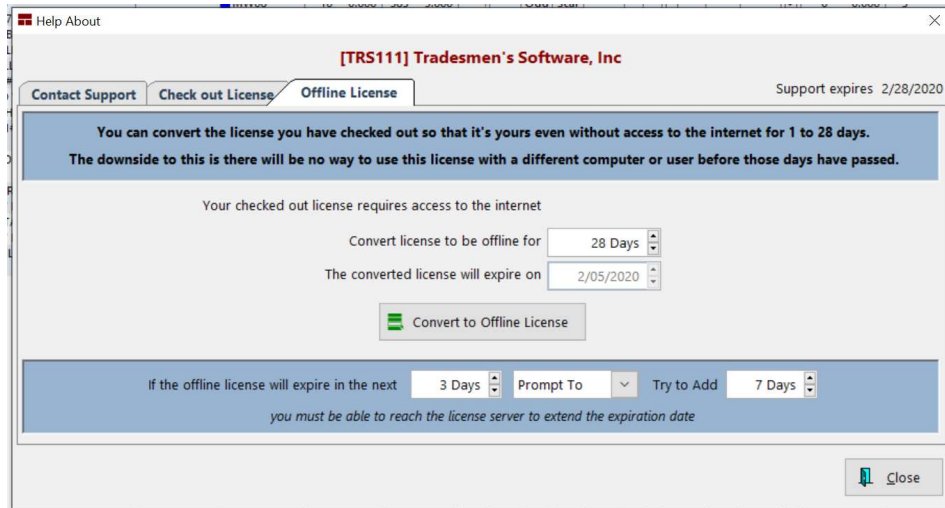
You can check out a different license if/when the need arises. Click on green license button located in the upper right corner of the screen. This will bring you to the screen with the available licenses.



There is an option to Configure Offline for times when you will not be able to stay connected to the internet (Exa...Field work, Vacation). The software has the option to run offline for up to 28 days. Click the green license button and then the [Offline License] tab.

Note: You will need to connect to the internet at least once a month to renew the Offline License.

Enter the number of days that you wish to have the license offline and then click on [Convert to Offline License].



Please do not hesitate to call us with any problems, questions or complications.

Thank You,


Christian Kott
Operations Manager