



Pegasus Capital Gold
Installation Guide

Pegasus Capital Gold (3.82)
Installation Guide
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Kettering
Northamptonshire
NN15 6PE
www.pegasus.co.uk



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Introduction

Getting ready to install Capital Gold

Before you can begin to use the software, various tasks need to be carried out to ensure that the system is installed correctly and that you get the best service from the software. We recommend that you:

- Download the software from the Infor Download Centre using instructions provided separately by Pegasus Software. If you don't have the instructions telephone Pegasus Customer Services on 01536 495040.
- Understand the basics of Windows and, if installing on a network, the networking environment in which the software will be used.
- Install the software according to the instructions in this guide, following the steps relevant to the type of installation you want.

We suggest that you use the demonstration data provided to learn about the basics of the system. You should also refer to F1 Help in the product for descriptions of the different parts of the product and instructions on how to use it.

Important: Before you install Capital Gold, read the Readme file for details of this release and late-breaking information.

Hardware Requirements

This guide does not provide information about hardware requirements. Please check the Microsoft website for hardware requirements for the relevant environment.

Please keep these points in mind when making decisions on hardware purchases. System performance of each PC and server depends on the following:

- the computing power
- how computers are configured, and what Windows features are installed
- the number of applications running, including anti-virus utilities, backup utilities, screen savers, and power savers
- the number of users in Capital Gold and the amount of data throughput
- whether Capital Gold is used on the file server, adding an additional load on the server.

Microsoft Mainstream and Extended Support

Within the Mainstream Support period, Microsoft provides security updates and new features. Mainstream Support is provided for a minimum of five years. Extended Support is then provided for a minimum of five years but with less support. Security updates are still provided. Visit support.microsoft.com for details.

Capital Gold is tested using and supported for Windows products mentioned in this guide that are under Microsoft Mainstream Support. Pegasus also offers support when Microsoft products are under Microsoft Extended Support but those environments are not tested.

- We recommend that the version of the Microsoft software you use with Pegasus products is in Microsoft Mainstream Support. If you experience an environmental problem in Pegasus we will then be able to test using the same environment.
- Support from Pegasus Software will end when Microsoft extended support ends.

Visit the support.microsoft.com for details of the Mainstream and Extended Support end dates

Microsoft .NET Framework

Microsoft .NET Framework version 4.7.2 is required to be installed only if the computer will be used for submitting Making Tax Digital VAT Returns.

Download it from www.microsoft.com/net/download/dotnet-framework-runtime.

The following Windows editions support the installation of Microsoft .NET Framework 4.7.2:

- Windows Server 2022
- Windows Server 2019
- Windows Server 2016
- Windows 11 (22H2+)
- Windows 10 (22H2+)

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Supported Microsoft Windows editions

Microsoft Windows Server

These Windows Server editions are supported.

Microsoft Windows Server editions that support Microsoft .NET 4.7.2

Microsoft .NET Framework 4.7.2 is needed to submit MTD VAT Returns from Pegasus Capital Gold.

Edition	Microsoft Support Ends	Extended Support Ends
Windows Server 2022	13/10/2026	14/10/2031
Windows Server 2019	09/01/2024	09/01/2029
Windows Server 2016	Withdrawn	11/01/2027

Microsoft Windows Server editions that do not support Microsoft .NET 4.7.2

Pegasus Capital Gold cannot be used to submit MTD VAT Returns from Pegasus Capital Gold using these platforms.

Edition	Microsoft Support
Windows Server 2012	No longer supported
Windows Server 2012 Essentials	No longer supported
Windows Small Business Server 2011	Depends on components

Microsoft Windows Desktop

These Windows desktop editions are supported.

Windows 11 (Enterprise & Pro)

Version	Pro Edition Support Ends	Enterprise Support Ends
23H2	11/11/2025	10/11/2026
22H2	08/10/2024	14/10/2025
21H2	No longer supported	08/10/2024

Windows 10 (Enterprise & Pro)

Version	Pro Edition Support Ends	Enterprise Support Ends
22H2	14/05/2024	13/05/2025
21H2	No longer supported	11/06/2024

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Installation Folders and Sharing the Data Folder

You need your Administrators password for the computer to install Capital Gold or you must be part of the Administrators' Group.

User Account Control

These Windows products includes User Account Control which lets you use your computer without administrator privileges to make it more secure from malicious software when you are connected to the internet. Even if you are a user with administrator's privileges, most programs are still run with a standard user's permissions and you are asked before anything is installed.

Before the Capital Gold installation program runs, the message "an unidentified program wants access to your computer" is displayed. This is not an error. The User Account Control feature is checking that you want to install the software before it allows it to continue.

Software Installation and Data Folders

The folders where Capital Gold is installed are:

- Unless the default location is changed, the program files are installed under the 'c:\Program Files' folder.
- In 64-bit operating systems, the Program Files folder is suffixed with 'x86', for example: 'c:\Program Files (x86)'.
- The Capital Gold data files are located in the 'c:\ProgramData\Pegasus\CapitalGold' folder.

Sharing the Data Folder

Making the ProgramData folder visible in Windows Explorer

After Capital Gold is installed, the product's data folder must be shared. To share the folder you may firstly need to make the ProgramData folder visible in Windows Explorer.

1. Open Windows Explorer, navigate to the 'c:\ProgramData\Pegasus\CapitalGold' folder and click the **Organise** button on the toolbar.
2. Click the **Folder and Search Options** menu item or **Options** button on the toolbar to open the **Folder Options** form. Then click the **View** tab.
 - i. Tick the **Show hidden files and folders** option
 - ii. Untick the **Hide protected operating system files** option and then click **OK**.
3. Double-click Local Disk (C:) to refresh Windows Explorer.

Sharing the ProgramData folder

1. Open the 'c:\ProgramData\Pegasus' folder.
2. Right-click on the **CapitalGold** folder, click **Share With** and then select 'Specific People'.
3. In the **Type a name and then click Add ...** box or **Choose people on your network ...** box, select 'Everyone' or 'Find People'.
4. Click **Share** and then click **Done**. Capital Gold is then ready to be used.

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Installing Capital Gold (stand-alone)

If you are using a virus-detection utility, disable it before you run the Capital Gold Setup program because it may interfere with installation. Also, close any open applications. You must be logged in as the Administrator, or a user with Administrator rights, when running the Capital Gold Setup program.

To Install Capital Gold on a single computer

1. From the installation setup menu, click **Install Capital Gold**. Then click **Next** when the setup procedure begins.
2. In the list displayed on the Choose Type of Installation dialog box, click **Local Server**.
3. Click **Next** and the Registration dialog box appears. In the boxes provided, type your name, company name and licence number. These details will have been supplied to you with the software.
4. Click **Next** and a confirmation of the registration details you entered will appear. If the details are correct, click **Yes** to continue, otherwise click **No** to return to the Registration dialog box to re-enter the details.
5. The Installation Directory dialog box appears, showing where Pegasus Capital Gold will be installed. Unless you have a very good reason to change the default location, we suggest you accept it by clicking **Next**. If you do want Pegasus Capital Gold installed in a different location, click **Browse** and select the drive and folder into which the programs will be installed before you continue.
6. Click **Next** and the Select Program Folder dialog box appears. A default program folder name of 'Pegasus Capital Gold' is shown in the Program Folders box. You can either accept this or select an existing folder from the Existing Folders list and then click **Next**.
7. A confirmation dialog box appears showing the installation details. If any of these are incorrect and you want to retrace any steps in the installation, click **Back**. If the details are correct and you want to carry out the installation, click **Next**. While the files are being installed, a monitor appears to show you the progress of the installation.
8. An information dialog then appears, advising you of further steps required if your installation of Capital Gold is to act as a server to other machines.
9. You will either see a message asking if you want to view the readme file and then prompting you to restart your computer, or a dialog box with two options. Tick the **Yes, I want to View the Readme File** box. Then click **Finish** to complete the installation. The Readme file displays the details of the release.
10. Before using Capital Gold, you need to set the permissions to the Capital Gold data folder. Follow the steps in the **Sharing the Data folder ...** sections on page 7.

After the installation of Capital Gold, you must restart the computer before actually using the product. The installation program may offer an option at the end of the installation process to restart the computer but even if the prompt does not appear, you must restart your computer before using Capital Gold.

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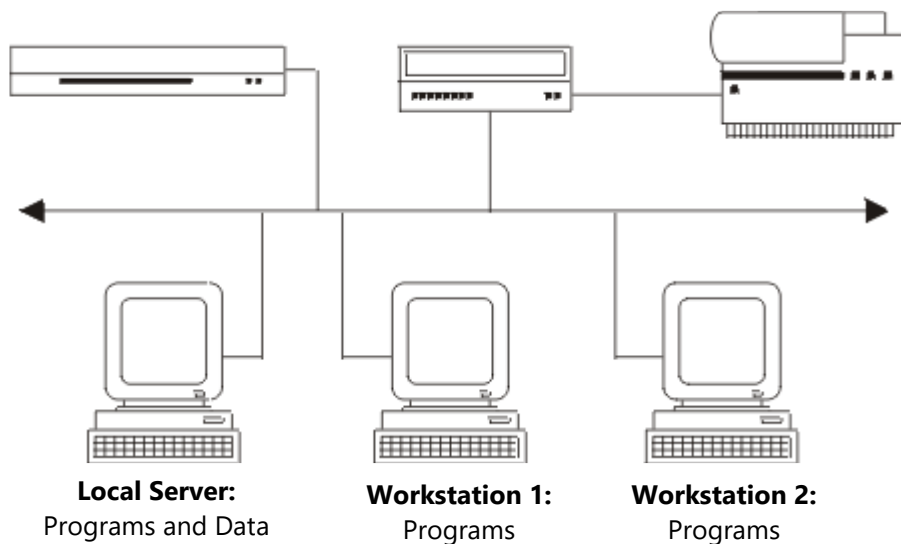
Installing Capital Gold (networked)

There are three installation types associated with networked installations:

Local Server	Use this installation type if the server is to be the local computer and will hold both programs and data and be capable of running Capital Gold. (This installation type is the same one used for stand-alone systems.)
Remote Server	Use this installation type if Capital Gold will be installed on the computer as part of a networked system. The computer you use will be designated a dedicated server, holding only the data files and will not be capable of running Capital Gold programs. When you use the Remote Server installation type, a workstation version is installed at the same time.
Workstation	Use this installation type for workstations connected to the network that will be capable of running Capital Gold programs, but will not store the data. The data will be accessed from either a local or a remote server.

Important: You must install the appropriate server type before you install any workstations. To use Capital Gold as a networked system, your server hard drive on which Capital Gold is installed must be fully shared, not just read-only.

Local Server Installation



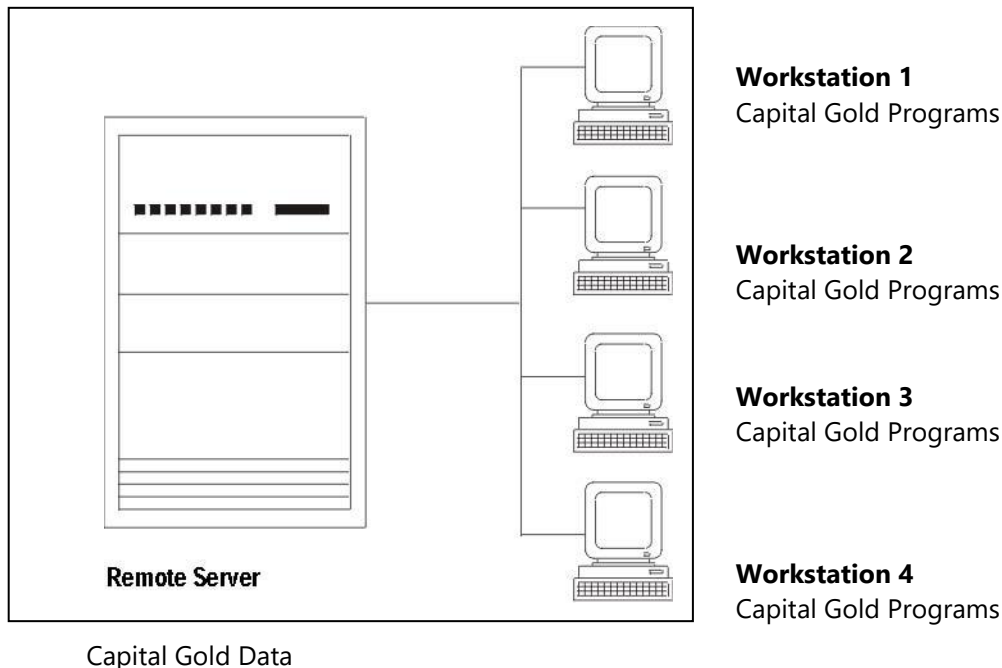
To Install Capital Gold for a Local Server

1. From the installation setup menu, click **Install Capital Gold**. Then click **Next** when the setup procedure begins.
2. In the list displayed on the Choose Type of Installation dialog box, click **Local Server**.
3. Click **Next** and the Registration dialog box appears. In the boxes provided, type your name, company name and licence number. These details will have been supplied to you with the software.
4. Click **Next** and a confirmation of the registration details you entered will appear. If the details are correct, click **Yes** to continue, otherwise click **No** to return to the Registration dialog box to re-enter the details.

5. The Installation Directory dialog box appears, showing where Pegasus Capital Gold will be installed. Unless you have a very good reason to change the default location, we suggest you accept it by clicking **Next**. If you do want Pegasus Capital Gold installed in a different location, click **Browse** and select the drive and folder into which the programs will be installed before you continue.
6. Click **Next** and the Select Program Folder dialog box appears. A default program folder name of 'Pegasus Capital Gold' is shown in the Program Folders box. You can either accept this or select an existing folder from the Existing Folders list and then click **Next**.
7. A confirmation dialog box appears showing the installation details. If any of these are incorrect and you want to retrace any steps in the installation, click **Back**. If the details are correct and you want to carry out the installation, click **Next**. While the files are being installed, a monitor will indicate the progress of the installation.
8. An information dialog then appears, advising you of further steps required if your installation of Capital Gold is to act as a server to other machines.
9. You will either see a message asking if you want to view the Readme file and then prompting you to restart your computer, or a dialog box with two options. Tick the **Yes, I want to View the Readme File** box. Then click **Finish** to complete the installation. The Readme file displays the details of the release.
10. Before using Capital Gold, you need to set the permissions to the Capital Gold data folder. Follow the steps in the **Sharing the Data folder ...** sections on page 7.

Remote Server Installation

Use this installation type if Capital Gold will be installed on the computer as part of a networked system. The computer you use will be designated a dedicated server, holding only the data files and will not be capable of running Capital Gold programs. When you use the Remote Server installation type, a workstation version is installed at the same time.



To Install Capital Gold on a Remote Server

1. From the installation setup menu, click **Install Capital Gold**. Then click **Next** when the setup procedure begins.
2. In the list displayed on the Choose Type of Installation dialog box, click **Remote Server**.
3. Click **Next** and the Registration dialog box appears. In the boxes provided, type your name, company name and licence number. These details will have been supplied to you with the software.
4. Click **Next** and a confirmation of the registration details you entered will appear. If the details are correct, click **Yes** to continue, otherwise click No to return to the Registration dialog box to re-enter the details.
5. The Installation Directory dialog box appears. This displays a default path for your Workstation installation.
6. The UNC To Remote Server dialog box appears. Use the **Browse** command button to specify the network path of the folder that is to contain the files for the Remote Server, (for example, \\Remote\CDRV\ProgFile\Pegasus\CapGold), and then click **Next**.

Important: If the remote server destination folder does not have the correct access permissions, the installation will fail. The destination directory must have full read, write, create, modify, and delete permissions as appropriate for the operating system in use.

7. Click **Next** and the Select Program Folder dialog box appears. A default program folder name of 'Pegasus Capital Gold' is shown in the Program Folders box. You can either accept this or select an existing folder from the Existing Folders list and then click **Next**.

8. A confirmation dialog box appears showing the installation details. If any of these are incorrect and you want to retrace any steps in the installation, click **Back**. If the details are correct and you want to carry out the installation, click **Next**. While the files are being installed, a monitor will indicate the progress of the installation.
9. An information dialog then appears, advising you of further steps required if your installation of Capital Gold is to act as a server to other machines.
10. You will either see a message asking if you want to view the Readme file and then prompting you to restart your computer, or a dialog box with two options. Tick the **Yes, I want to View the Readme File** box. Then click **Finish** to complete the installation. The Readme file displays the details of the release.

Workstation Installation

Use this installation type for workstations connected to the network that will be capable of running Capital Gold programs, but will not store the data. The data will be accessed from either a local or a remote server.

To Install Capital Gold on a Workstation

1. From the installation setup menu, click **Install Capital Gold**. The setup procedure will begin.
2. In the list displayed on the **Choose Type of Installation** dialog box, click **Workstation**.
3. The UNC To Capital Gold Server dialog box appears. Use the **Browse** command button to specify the network path of the folder that contains the local or remote server version of the product.
4. A confirmation dialog box appears showing the installation details. If any of these are incorrect and you want to retrace any steps in the installation, click **Back**. If the details are correct and you want to carry out the installation, click **Next**.
5. While the files are being installed, a monitor will indicate the progress of the installation.
6. You will either see a message asking if you want to view the Readme file and then prompting you to restart your computer, or a dialog box with two options. Tick the **Yes, I want to View the Readme File**. Then click **Finish** to complete the installation. The Readme file displays the details of the release.
7. Repeat the above steps for each workstation copy you want to install.

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Starting Capital Gold

Once Capital Gold has been installed, the Pegasus Capital Gold folder will appear on your Windows desktop. There will also be a menu option for Pegasus Capital Gold in the Programs section of the Start menu.

To Start Capital Gold

1. Do either of the following:
 - Open the Pegasus Capital Gold folder, and then double-click **Pegasus Capital Gold**.
 - Click the Windows **Start** button, and then click **All Programs**. Click the **Pegasus Capital Gold** menu, and then click **Pegasus Capital Gold**. The User Login form appears and the User Name list shows a default selection of ADMINISTRATOR.
2. In the Password box, type 'password' and then click **OK**. The **Open Company** form appears and the default selection is Summer School Limited; a fictitious company set up for demonstration purposes.
3. Click **OK** to load the demonstration data company.

Note: Certain restrictions apply when Pegasus Capital Gold is first installed. It is not possible use the software fully until the software is activated. The activation details will have been supplied to you with the software.

To obtain your Pegasus Capital Gold activation key, telephone Customer Services on 01536 495040. This is only available to those who have purchased the product direct through Pegasus or through an authorised Pegasus partner.

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Upgrading Capital Gold

If you already have Capital Gold installed on your computer, the setup procedure will update it for you. You can only upgrade to a version of Capital Gold that is later than the one you have installed already. Your existing data files are unaffected, but we strongly recommend you back up your data before you install a new version of Capital Gold.

Important: If you are using a virus-detection utility, disable it before you run the Capital Gold Setup program because it may interfere with installation. Also, close any open applications.

Before You Upgrade Capital Gold

Before upgrading, remember to take a backup of your company's data. In addition, if any reports in the 'Reports' folder below the Capital Gold folder have been amended you need to copy them to another location before upgrading.

Amended Document Reports in the 'Reports' folder

If you have amended document reports like sales orders, invoices, list of sales invoices and credit notes, and so on that are in the *Reports* folder they must be moved to the *UserReports* folder before you upgrade to the new version of Capital Gold.

Amended Document Reports in the 'UserReports' folder

Any amended document reports like sales orders, invoices, list of sales invoices and credit notes, and so on should normally be in the *UserReports* folder below the Capital Gold folder. These document reports are not touched by the upgrade so they can be left where they are.

To Upgrade your existing Capital Gold Installation

1. From the installation setup menu, select **Install Capital Gold**. The setup process will begin with the 'Welcome' dialog.
2. Click **Next** and the Upgrade or Uninstall dialog box will appear.
3. Click **Upgrade** and then click **Next**.
4. Confirmation of the product details is displayed. Click **Next** to carry out the upgrade.
5. When the upgrade is complete, click **Finish**.

Your programs have now been upgraded. If any company databases require upgrading, Capital Gold will detect that this is so when you next attempt to open any such company and will offer you the opportunity to do the conversion of the company data.

Important: When you have finished upgrading your Capital Gold system, refer to Pegasus Help Centre (docs.pegasus.co.uk) for details of new features that apply to the latest release of Capital Gold.

Upgrading Remote Servers installations

For either of the above upgrades, it is important that the Remote Server is accessible from the workstation, or the upgrade will not be able to run. Any workstation can be used to perform the upgrade. The first workstation to be upgraded will automatically upgrade the Remote Server.

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Troubleshooting

Troubleshooting New Installations

Installing Pegasus Capital Gold when it is already open

You should not have other applications running when installing Pegasus Capital Gold. If you install Pegasus Capital Gold while an existing copy of the product is open, the installation program will display a message "Setup has detected that a product in the Capital family is currently being run". Should this happen, you must abort the Pegasus Capital Gold installation, close down Pegasus Capital Gold and any other applications, and re-run the Pegasus Capital Gold installation.

Troubleshooting Upgrade Installations

During the upgrade procedure, the Setup wizard will carry out various checks to make sure that the installation runs smoothly. Where problems are detected, an error message or warning may be displayed. Below is a list of some of the possible error conditions and their meaning.

The version number of the current database is incorrect

You cannot upgrade unless the version you are upgrading is older than the one you want to install.

The version number of the new database is incorrect

You cannot upgrade unless the version you are installing is newer than the one you want to upgrade.

Failed to open the Capital Gold database exclusively. Is someone else using it?

The upgrade process has to be carried out exclusively (only one person can upgrade a company, and while it is being done, no one else can use the company). This message will be displayed if two users have logged in to the same company and one of them tries to go ahead and upgrade it while the other is logged in.

Failed to upgrade the new company database with the reports that you have added. You will have to add them again if you want to carry on using them.

If you have added reports to Capital Gold using Crystal Reports, this error may be displayed. You can continue with the upgrade, but you may need to add the reports again to Capital Gold afterwards.

Failed to update the VATRATES table in the new, temporary, database.

This is displayed if an error is encountered while trying to update the VAT rates table with the details of any you may have added. You can continue with the upgrade, but you may need to add the rates again to Capital Gold afterwards.

Note: There are other error conditions of a more technical nature, apart from those listed above. If they should occur, seek advice from your Capital Gold Partner or support technician.

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Repairing a Capital Gold Installation

If you already have Capital Gold installed on your computer but need to repair the installation, you can use the setup wizard to recopy the program files. Your company's existing data files are unaffected, but we strongly recommend you back up your data before you install a new version of Capital Gold. The option to repair an installation can only be used if the version of Capital Gold you have installed is the same as the Capital Gold installation software that you have downloaded from the Infor Download Centre.

Important: If you are using a virus-detection utility, disable it before you run the Capital Gold Setup program because it may interfere with installation. Also, close any open applications. You must be logged in as the Administrator, or a user with Administrator rights, when running the Capital Gold Setup program.

If you have amended document reports like sales orders, invoices, list of sales invoices and credit notes, and so on that are in the *Reports* folder they must be moved to the *UserReports* folder before you repair the new version of Capital Gold.

To Repair an existing installation of Capital Gold

1. From the installation setup menu, select **Install Capital Gold**. The setup process will begin with the 'Welcome' dialog.
2. Click **Next** and the Repair or Uninstall dialog box will appear.
3. Click **Repair** and then click **Next**.
4. Confirmation of the product details is displayed. Click **Next** to carry out the repair.
5. When the repair is complete, click **Finish**.

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Uninstalling Capital Gold

If you want to remove Capital Gold from your computer you must use the Capital Gold installation software that you have downloaded from the Infor Download Centre. If you do not have the Capital Gold installation software please contact Pegasus Customer Services or your authorised Pegasus partner.

You need to follow these instructions on each computer where Capital Gold is installed.

To Remove Capital Gold

1. From the installation setup menu, select **Install Capital Gold**. The setup process begins with the 'Welcome' dialog.
2. Click **Next** and the Repair or Uninstall dialog box appears.
3. Select **Uninstall** then click **Next** and **Next** again. If you are offered a dialog box 'Shared File Detected', click on the check box **Don't display this message again**, then click **Yes**. While the files are being deleted, a monitor will indicate the progress.

Notes: Some components may be left on the computer after the product is uninstalled. For example, if you have created data files or used the demonstration data, the CapitalGold folder will remain. A dialog box will give an appropriate reminder.

When uninstalling a workstation attached to a remote server, you will be offered the opportunity to uninstall the remote server as well. The remote server should only be uninstalled if the entire Capital Gold system is being removed.

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Protecting your System and Data

Pegasus Software is committed to performing regular security reviews of our software. This involves using standard vulnerability identification tools where possible to scan for software vulnerabilities as well as undertaking regular internal code reviews. Although we can never guarantee that our software is free of vulnerabilities, any vulnerabilities found will be immediately addressed and fixed with the highest priority.

Pegasus Software provides general guidelines on how to install, secure and protect the installation of our software through our product documentation. However, we cannot guarantee the security of the surrounding hardware/environment infrastructure, which is the responsibility of the customer, including networks, firewalls, operating systems, and web server configurations.

Although we always do our best to ensure that our software protects the customer, their users and their data, the customer also has a responsibility to protect themselves. It is therefore the customer's responsibility not to access the software or services, from a location that is not secure, would violate laws or would otherwise be inappropriate. Customers should also note that clicking on inappropriate links in emails or on websites or exposing data to the internet can all pose an element of risk, and may provide the opportunity for unauthorised third parties to circumvent security precautions and illegally gain access to the software, services and your data.

To help protect your business we would strongly advise that users of the system keep their usernames, passwords, or any other credentials secure and for their sole use. The changing of passwords on a regular basis as determined by each company's policies and procedures should also be adhered to. Users should also be security aware and should be cautious of any unsolicited emails requesting information or links which could ultimately be a security threat to your system.

In addition, customers should adhere to strict backup regimes to mitigate against data loss through security breaches, hardware failure or other unforeseen circumstances.

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Frequently Asked Questions

I have installed a Networked version of Pegasus Capital Gold, but am unable to install a Workstation version to access it. What is wrong?

The most likely answer is that you do not have access to the Pegasus Capital Gold server. Having installed a Networked version of Pegasus Capital Gold, you must ensure that the folder where Pegasus Capital Gold has been installed is shared and with write permissions to all other Pegasus Capital Gold users.

My Pegasus Capital Gold installation did not upgrade my previous copy of Capital (or Capital Lite). What happened and what should I do now?

Either the Pegasus Capital Gold installation program was unable to detect your existing installation of Capital (or Capital Lite), or your existing installation of Capital (or Capital Lite) is on a different computer from that on which you installed Pegasus Capital Gold. You must now manually run the conversion program. Ask either Pegasus or your authorised Pegasus partner for assistance.

Pegasus Capital Gold has stopped running without warning. I am concerned that some of the Pegasus Capital Gold programs may have been corrupted or deleted. What should I do?

If the problem is caused by corruption or deletion of any of the application files and/or programs (for example, *.EXE, *.DLL or *.OCX files), you should reinstall Pegasus Capital Gold using the Repair installation option as described in the section Repair Capital Gold Installation. Then run the **Reorganise Data** and **Data Integrity Checker** commands on the File - Housekeeping menu in Capital Gold.

I have uninstalled all my workstations but the remote server remains. Can I just delete it from the remote server?

Yes. Use Windows Explorer to locate the folder on the remote server containing the Pegasus Capital Gold (data) files and delete the folder (subfolders will also be deleted).

I have just installed Capital Gold. Where are the data files stored?

Your data files are in the 'C:\ProgramData\Pegasus\CapitalGold' folder.

How do I check the version of the operating system in use?

From the Windows Start menu, run the 'Winver' command to open the 'About Windows' dialog for the computer.