

Network (Multi-User) Installation Instructions

Document #:	3013	Product:	CenterPoint [®]

This topic describes how to install CenterPoint in a network (multi-user) environment:

- Single User Network Installation One user with the database on a server. You must purchase a network installation.
- Multi-User Multiple users with the database on a server. You must purchase additional seats if multiple users are accessing the database on a server.

If you will only be using CenterPoint with your data on one computer, please refer to the Single User Installation Instructions document.

There are two steps to installing CenterPoint in a network environment:

Step A: Install at the Server

Step B: Install at each Workstation

Note: These instructions cover multiple program verticals for CenterPoint, for example, CenterPoint Accounting for Agriculture, CenterPoint Fund Accounting, CenterPoint Accounting, and CenterPoint Payroll. The name "CenterPoint" is used in this guide to refer to any of the program verticals. When information in this guide applies to a specific program vertical for CenterPoint, the specific program vertical name will be used.

Prerequisites

Complete the following setup on your network prior to installing CenterPoint. The prerequisites differ depending on the type of network being used. For assistance on any of the prerequisite steps, please contact your Network Administrator.

Prerequisites for Peer-to-Peer (Workgroup) Networks (Windows Authentication):

- » Server:
 - All users setup on workstations that will access CenterPoint must also be setup on the server with the same username and password.
- Workstation(s):
 - All user names must have Windows login passwords (must be the same as was setup on the server).
 - » All workstations must be joined to the same workgroup.

Prerequisites for Domain Networks:

- ^{>>} All workstations need to be a member of the Domain that the server is a part of.
- CenterPoint uses Microsoft SQL Server. For security and performance reasons, it is not recommended that Microsoft SQL Server be installed on a Domain Controller. For more information, please see the Frequently Asked Questions section of this document.

If you also purchased and will be installing CenterPoint Payroll, it should be installed <u>after</u> any CenterPoint Accounting programs.

Step A - Install at the Server:

- 1. Close all other programs prior to starting the installation of CenterPoint.
- 2. From a web browser, enter www.redwingsoftware.com.
- 3. From the Red Wing Software home page, in the upper-right corner, click **Login**, enter your **Email Address** and **Password**, and then click **Login**.
 - a. If you have not previously registered on the Red Wing Software website, please see the *Frequently Asked Questions* section of this document for more information about registering on our website.
 - b. If you do not recall your password for the Red Wing Software website, please see the *Frequently Asked Questions* section of this document for more information on retrieving a forgotten password.
- 4. To download the CenterPoint program:
 - From the My Member Account page, select the Downloads tab, locate your product and select Downloads, locate the download you need, and then click Download Now.
 - Or
 - Select Menu, locate your product, select Downloads, locate the download you need, and then click Download Now.
- 5. Wait while the program downloads. The file will automatically save to your Downloads folder. If you are unable to download CenterPoint, please contact our Technical Support Department.
- 6. Select the **CenterPoint##.exe** file in your task bar or open the Downloads folder and then select the file to begin the installation. Wait while the contents of the setup package are verified.
- 7. If you receive an **Application Requirements** screen, click **Next** to install the necessary requirements. Wait while the requirements are installed.
- 8. If you are prompted to restart your computer, click **OK**. The computer will restart and the installation will automatically resume. This process may repeat depending on the number of requirements you need to install.
- 9. On the **Welcome** screen, click **Next** to continue.
- 10. On the License Agreement screen, select the I accept the terms of the license agreement check box, and then click Next to continue.
- 11. On the Setup Type screen, select Complete, and then click Next to continue.
- 12. By default, CenterPoint will install to C:\Program Files (x86)\Red Wing Software\CenterPoint. We recommend accepting the default. On the **Destination Folder** screen, click **Next**.
- 13. On the Select Program Folder screen, you should generally accept the default program folder location by clicking Next.
- 14. On the Completing screen, click Next to continue. Please wait while CenterPoint is installed.
- 15. On the **Completing** screen, click **Finish**. If you are prompted to restart your computer, please do so at your earliest convenience.
- 16. If you also purchased CenterPoint Payroll, follow steps 1-15 to install CenterPoint Payroll.
- 17. Individual modules are configured separately after purchase and registration. See the How to Add a Module topic after CenterPoint is started if you have purchased the Accounts Receivable or Inventory modules. Select Help > CenterPoint Help > Installation and Registration > Add a Module to an Existing Database.
- In each firewall running on the server, exceptions must be configured to allow CenterPoint to run properly. In Windows 10/11, right-click on Start, select Search, and then enter Windows Defender Firewall. Select Advanced settings (menu on the left). > Inbound Rules (on the left again).

Port 1433 Exception:

- 1. On the right, select **New Rule**. This will display a wizard that will walk you through the process.
- 2. Select **Port** and then **Next**.
- 3. Select TCP in the first section. Then select Specified local ports and enter 1433. Click Next.

Wew Inbound Rule Wizard		×					
Protocol and Ports							
Specify the protocols and ports to	which this rule applies.						
Steps:	Does this rule apply to TCP or UDI	20					
 Rule Type 		- /					
Protocol and Ports	TCP						
 Action 	© UDP						
 Profile 							
 Name 	Does this rule apply to all local ports or specific local ports?						
	O All local ports						
	Specific local ports:	1433					
		Example: 80.443, 5000-5010					
	Learn more about protocol and poor	ta < Back Next > Cancel					

- 4. Select Allow the Connections and click Next.
- 5. In the When Does This Rule Apply screen, select all fields and click Next.
- 6. In the Name field, enter *Port 1433 Exception* and click Finish.

SQLServr.exe Exception:

- 1. In Windows 10/11, right-click on **Start**, select **Search**, and then enter **Windows Defender Firewall**. Select **Advanced settings** (menu on the left). > **Inbound Rules** (on the left again).
- 2. On the right, select New Rule. This will display a wizard that will walk you through the process.
- 3. Select **Program** and then **Next**.
- 4. Select This Program Path.
- 5. Using the **Browse** button, select the **SQLServr.exe** file and click **Next**. The location for SQLServr.exe will be in a path similar to this: C:\Program Files\Microsoft SQL Server\MSSQL15.RWS64\MSSQL\Binn, or if you are using a version of SQL Server prior to 2019: C:\Program Files (x86)\Microsoft SQL Server\MSSQL12.RWS\MSSQL\Binn.
- 6. Select Allow the Connection and click Next.
- 7. In the When Does This Rule Apply screen, select all fields and click Next.
- 8. In the Name field, enter SQLServr.exe Exception and click Finish.

SQLBrowser.exe Exception:

- In Windows 10/11, right-click on Start, select Apps & Features, and then in the upper left side of the screen, enter Windows Firewall or in Windows 8, select Control Panel > Windows Firewall. Select Advanced settings (menu on the left). > Inbound Rules (on the left again).
- 2. On the right, select **New Rule**. This will display a wizard that will walk you through the process.
- 3. Select **Program** and then **Next**.
- 4. Select This Program Path.
- 5. Using the **Browse** button, select the **SQLBrowser.exe** file and click **Next**. The location for SQLBrowser.exe will be in a path similar to this: C:\Program Files(x86)\Microsoft SQLServer\90\Shared.
- 6. Select Allow the Connection and click Next.
- 7. In the When Does This Rule Apply screen, select all fields and click Next.
- 8. In the **Name** field, enter **SQLBrowser.exe Exception** and click **Finish**.
- 19. Verify the following SQL protocols are enabled and that the browser is running:
 - a. At the Server, click **Start**, select **Microsoft SQL Server 20##** or open **Microsoft SQL Server 20##**, and then select **SQL Server 20## Configuration Manager**.
 - b. Under SQL Server Configuration Manager, select **SQL Server Network Configuration**, and then select **Protocols for RWS64** or **RWS** previously.

c. Verify that the **Named Pipes** and **TCP/IP** protocol status is **Enabled**.

SQL Server Configuration Manager (Local)	Protocol Name	Status	
SQL Server Services	🖫 Shared Memory	Enabled	
SQL Server Network Configuration (32bit)	🖇 Named Pipes	Enabled	
✓ Josephilic Charles Charles Configuration (S2)	TCP/IP	Enabled	
B _⊂ Protocols for RWS64			
》 SQL Native Client 11.0 Configuration			

- d. Under SQL Server Configuration Manager, select **SQL Server Services**.
- e. Verify that the SQL Server Browser state is Running.

Sql Server Configuration Manager File Action View Help (
 SQL Server Configuration Manager (Local) SQL Server Services SQL Server Network Configuration Protocols for RWS64 SQL Native Client 11.0 Configuration (32) 	Name SCL Server (RWS) SCL Server Agent SCL Server Browser	 Start Mode Automatic Other (Boot, Syste Automatic

- 20. To start CenterPoint, double-click the **CenterPoint** icon on your desktop.
- 21. On the **Module Configuration Manager** screen, review the selections and click **OK**.
- 22. CenterPoint must be registered on the server. See the Frequently Asked Questions section for more information on registering CenterPoint.
- 23. It is important that CenterPoint is operating properly at the server computer and all databases have been created, before setting up the client workstations; including transferring data from other Red Wing Software programs (Perception, AgCHEK, Champion Controller, etc), creating new databases, or attaching to existing databases.

Step B - Install at each Workstation that will be using CenterPoint:

Note: If you do not want to install SQL locally, see the Can I install CenterPoint without installing SQL Server Express on my workstations? question/answer in the Frequently Asked Questions section of this document.

- 1. Follow steps 1-17 from the Server Installation section.
- 2. To start CenterPoint, double-click the **CenterPoint** icon on your desktop.
- 3. On the Module Configuration Manager screen, review the selections and click OK.
- 4. CenterPoint must be registered at each workstation. See the Frequently Asked Questions section for more information on registering CenterPoint.
- 5. Select File > Administration > Data Maintenance
 - a. If you receive a message that the database is open, click **Yes** to close the database.
 - b. On the **Database Maintenance** screen, click **Add** in the bottom left corner.

Default Server (local)\R\v/S			
Name CenterPointSample PayrollSample	ple		Server (local)\RWS (local)\RWS	

c. On the Add Database screen, click Add Server.

Add Data	base	
Select a Databas	server from the list. Then select th e button to add a database to the s	e database(s) to add from the list and click the OK button. Click the Add and water it available in the list.
Server	(local)\RWS	✓ Add Server
	Available Databases on Server	
Search		
	Example Database	
		-
		Refresh List
		OK Cancel

d. All available servers that you can connect to will display under the **Available Server** column. From the Available Server column, select the server that you want this workstation to connect to by moving it to the **Selected Servers** column. The predefined SQL instance from RWS ends with \RWS64, unless you are using the previous version, then it is \RWS. If you are not using the predefined instance, for example if you are using the full version of SQL, select your SQL server.

\$ Add/Remove Server(s)					×
Available Servers		Selected Servers			
EXAMPLE-WX\RWS	>	(local)∖RWS			
Refresh				A	dd
			(Ж	0

- e. On the Server Settings screen, in the **Authentication** box, by default we recommend you use Window Authentication. If you prefer you can select SQL Authentication. If you select SQL Authentication, please contact Technical Support for more information.
- f. Click OK.
- g. On the Add/Remove Server(s) screen, click **OK**.
- h. On the **Add Database** screen, click on the drop-down box in the **Server** field. Choose the server that was added in step d. To make this the default server, click in the drop down box in the Server field again, right-click and select Set As Default
- i. All databases available on that server will then be listed in the **Available Databases on Server** box. Either select the database to attach to or in the **Search** box, enter the first few characters of the database name until

CenterPoint locates the database you want to attach to. Multiple databases can be selected by holding down the Ctrl key on the keyboard while clicking on the databases.

- j. Click OK.
- k. Click **Close**.
- 6. Select **File > Open**. Select the database that you want to open. Click **Open**.

Frequently Asked Questions:

Q: How do I Add, Edit or Remove a SQL Server from File > Administration > Data Maintenance? Add a Server

- 1. Select File > Administration > Data Maintenance.
- 2. Click the Servers button or right-click and select Servers and then click the Add button or right-click and select Add. All available servers that you can connect to will display under the Available Server column. From the Available Server column, select the server that you want this workstation to connect to by moving it to the Selected Servers column. The predefined SQL instance from RWS ends with \RWS64, unless you are using the previous version, then it is \RWS. If you are not using the predefined instance, for example if you are using the full version of SQL, select your SQL server. On the Server Settings screen, in the Authentication box, by default we recommend you use Window Authentication. If you prefer you can select SQL Authentication. If you select SQL Authentication, please contact Technical Support for more information.
- 3. Click OK.
- 4. Click OK.
- 5. Click Close.
- 6. Click Close.

Edit a Server (Change Server Credentials)

- 1. Select File > Administration > Data Maintenance.
- 2. Click the **Servers** button or right-click and select **Servers**, select an existing server you want change credentials for, and then click the **Edit** button or right-click and select **Edit**.
- 3. Edit the credentials. On the Server Settings screen, in the **Authentication** box, by default we recommend you use Window Authentication. If you prefer you can select SQL Authentication. If you select SQL Authentication, please contact Technical Support for more information.
- 4. Click OK.
- 5. Click Close.
- 6. Click Close.

Or

- 1. Select File > Administration > Data Maintenance.
- 2. From the Database Maintenance screen, select a database and right-click and select your server name.
- 3. Select Edit Server Credentials.
- 4. Edit the credentials. On the Server Settings screen, in the **Authentication** box, by default we recommend you use Window Authentication. If you prefer you can select SQL Authentication. If you select SQL Authentication, please contact Technical Support for more information.
- 5. Click **OK**.
- 6. Click Close.

Remove a Server

- 1. Select File > Administration > Data Maintenance.
- 2. Click the **Servers** button or right-click and select **Servers**, select an existing server, and then click the **Remove** button or right-click and select **Remove**.
- 3. To remove the server and any associated databases from CenterPoint, click **Yes**. Note: This will not delete your database(s) from the server.
- 4. Click Close.
- 5. Click Close.

- Or
- 1. Select File > Administration > Data Maintenance.
- 2. From the Database Maintenance screen, select a database and right-click and select your server name.
- 3. Select **Remove Server**. Note: This will not delete your database(s) from the server.
- 4. Click Close.

Q: How do I set a default SQL Server or change my default SQL server.

A: To set a default or change the default SQL Server, follow the steps listed below:

- 1. Select File > Administration > Data Maintenance.
- 2. Click the Servers button or right-click and select Servers.
- 3. Select an existing server and right-click and select Set as Default.
- 4. Click Close.
- 5. Click Close.

Or

- 1. Select File > Administration > Data Maintenance.
- 2. From the Database Maintenance screen, select a database, right-click and select your server name.
- 3. Select Set as Default Server.
- 4. Click Close.

Or

- 1. Select File > Administration > Data Maintenance.
- 2. From the Database Maintenance screen, click the Add button or right-click and select Add Database.
- 3. In the **Server** drop-down box, select a server.
- 4. Right-click on the Server box and select Set as Default.
- 5. Click OK.
- 6. Click Close.

Q: Can I import or export my CenterPoint Database Maintenance configurations for use with other workstations on my network?

A: Yes, CenterPoint Database Maintenance configurations can be exported/imported by following the steps listed below. Note: This process will export and import server and database configurations. This allows you to set up one workstation, export the configurations and easily import them into other workstations.

Export a Server Configuration File

- 1. Select File > Administration > Data Maintenance.
- 2. Right-click and select **Export Configuration**.
- 3. A database.xml file will be created. Select the location you want the file saved to.
- 4. Click Save.

Import a Server Configuration File

- 1. Select File > Administration > Data Maintenance.
- 2. Right-click and select Import Configuration.
- 3. Locate the database.xml file that was previously saved.
- 4. Click Open.

Q: How do I remove databases from a Server?

A: To remove a database or databases from a SQL Server or remove all databases from a server without deleting databases, follow the steps listed below:

Remove a Database from a SQL Server:

- 1. Select File > Administration > Data Maintenance.
- 2. Select the database you want to remove.
- 3. Right-click and select **Remove Database** or click the **Remove** button.

- 4. Select whether you want to **Detach Database from Server** or **Remove Physical Database File (Permanently remove database)**.
- 5. Click Yes.
- 6. Read the displayed message and if you agree, click Yes.

Remove All Databases from a SQL Server without Deleting Databases

- 1. Select File > Administration > Data Maintenance.
- 2. Select the Servers button or right-click and select the server you want all databases removed from.
- 3. Select **Remove**.
- 4. Read the displayed message and if you agree, click **Yes**.

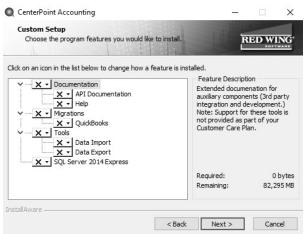
Q: The software installed without any errors, but the software won't open? Or I received an error during installation and it stopped the installation of the software.

A: Make sure that all anti-virus, firewall, and any other security software are shut down prior to installing CenterPoint. If any of these software applications are running, the installation may be interrupted and will cause the installation to fail.

Q: Can I install CenterPoint without installing SQL Server Express on my workstations?

A: Yes. In some network environments you may want to install CenterPoint without installing SQL Server Express. During the installation of CenterPoint, on the Setup Type screen, select **Custom**, click **Next**,

On the Custom Setup screen, click the down arrow next to SQL Server Express and select Entire feature will be unavailable.



Q: Is there a way to perform a silent command line installation of CenterPoint with and without installing SQL?A: Yes, CenterPoint can be installed from the command line, follow the instructions below:

To perform a silent command line CenterPoint installation with the full installation of SQL:

From the command line, enter <EXE> /s

To perform a silent command line installation of CenterPoint without installing SQL:

>>> From the command line, enter <EXE> /s INSTALLSQL=FALSE

Q: When I was trying to add my server in the Database Maintenance screen (step 5 in the workstation installation instructions), my server was not listed. Why is that and how can I get it in the list?

A: Normally this happens if exceptions (<u>Step 18</u> of the Server Installation instructions) were not setup or were not setup properly. Once the exceptions are completed properly, the server should be in the list. If it is still not available in the list, type in the server machine's IP address to add the machine to the Selected Servers list manually. Enter the address in the box next to the Add button with "\RWS" in the Add/Remove Server(s) screen (for example, 192.168.1.100\RWS), and then click Add.

Q: I received the following message when I tried connecting to a server in the Database Maintenance screen, "Failed to retrieve database for server XXX when trying to add a server in data maintenance. You may not have permissions for that SQL Server when connecting to a network database."

A: First, try a simple shutdown and restart of the server and the workstation. If that does not resolve the problem, then ask your Network Administrator to repeat each of the prerequisite steps. Normally this error is displayed if one or more of the prerequisites noted at the beginning of this document were not completed or not completed properly.

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Note: If the server has any Home version of the Windows operating system, you will need to either upgrade to a different operating system or use SQL Authentication. For more information about SQL Authentication, please contact Technical Support.

Q: Do I need to do anything different during the installation if I will be installing CenterPoint on a Terminal Services server?

A: Yes. Prior to Step 1 of the installation instructions, do the following:

- 1. Click on **Start** and then click **Run**.
- 2. In the **Open** box, type **cmd** and then click **OK**.
- 3. At the command prompt, type **changeuser** /**install**, and then press **Enter**. The "User session is ready to install applications" message displays.
- 4. Type exit and press Enter.

After installing CenterPoint on the server and prior to opening CenterPoint, do the following:

- 1. Click on **Start** and then click **Run**.
- 2. In the **Open** box, type **cmd** and then click **OK**.
- 3. At the command prompt, type **changeuser** /**execute**, and then press **Enter**. The "User session is ready to execute applications" message displays.
- 4. Type **exit** and press **Enter**.

Q: What are the minimum roles needed by CenterPoint for Microsoft SQL Server?

A: A verification is performed for the person using the database to determine if they have appropriate privileges to run the following tasks: opening or creating a database, attaching, removing or detaching a database to/from the SQL Server, and backing up or restoring a database. The following actions require the specified roles:

- Opening a Database:
 - » Required Permissions: SELECT, INSERT, UPDATE and DELETE.
 - Suggested Minimum Roles: db_datareader, db_datawriter.
- >>> Creating a New Database:
 - » Required Permissions: CREATE ANY DATABASE.
 - Suggested Minimum Roles: db_creator.
- Attaching a Database:
 - » Required Permissions: CREATE ANY DATABASE.
 - Suggested Minimum Roles: db_creator
- Backing up a Database:
 - » Required Permissions: BACKUP DATABASE, CONTROL.
 - » Suggested Minimum Roles: db_owner.
- Restoring a Database Backup:
 - » Required Permissions: CREATE ANY DATABASE.
 - Suggested Minimum Roles: db_creator.
- Detaching/Deleting a Database:
 - » Required Permissions: CONTROL SERVER.
 - Suggested Minimum Roles: sysadmin.

Q: Can CenterPoint be installed on a Domain Controller?

A: For security and performance reasons, it is **NOT** recommended that you install SQL Server on a domain controller. Domain controllers are primarily used for authentication purposes and do not support local users which SQL Server relies on. There are

security restrictions when running SQL Server on a domain controller and it opens up some potential security risks that we believe should not be taken. Also, the domain controller tasks may result in decreased SQL Server performance.

Another concern is that SQL Server is not supported on a read-only domain controller. Setup will usually fail and even if you find a way to work around the problem with setup, SQL Server is not supported on a read-only domain controller.

There are two options that would allow you to use your domain controller:

- >>> Setup a virtual machine on the domain controller and use that for your SQL Server installation.

If you decide to use any of the options discussed above, you will need to have your network technician make the necessary changes or setup the virtual machine. Red Wing Software <u>will not</u> assist in the installation and configuration of SQL Server on a Domain Controller.

For more information, please refer to the following articles from Microsoft:

- Hardware and Software Requirements for Installing SQL Server 2012 (this applies to 2008 and 2014 as well) http://msdn.microsoft.com/en-us/library/ms143506.aspx
- You may encounter problems when installing SQL Server on a domain controller http://support.microsoft.com/kb/2032911

Q: I have not previously registered on the Red Wing Software website, how do I register?

A: To register on the Red Wing Software website:

- 1. Click **Register**.
- 2. In the **Account Number** box, enter your company Account Number. Your Account Number can be located in a few different places:
 - a. On the Support Certificate that you receive upon renewing or purchasing Customer Care Membership.
 - b. Red Wing Software sends customers a renewal form for Customer Care Membership. This renewal form contains your account number.
 - c. Invoices you've received from Red Wing Software contain your account number.
 - d. If others at your company have already registered, they can sign in to their account and find your company's account number at www.redwingsoftware.com/home/myaccount.
 - e. Contact Red Wing Software at 800-732-9464.
- 3. Continue entering your Title, First and Last Name, Email Address (which is your login) and a Password.
- 4. Enter the displayed Security Verification code, and then click Submit.

Q: I do not recall what my password is for the Red Wing Software website, how do I retrieve my password?

A: To Retrieve a Forgotten Password:

- 1. From a web browser, enter **www.redwingsoftware.com**.
- 2. From the Red Wing Software home page, in the upper-right corner, click Login.
- 3. Click the **Forgot** link.
- 4. Enter/verify your Email Address.
- 5. Enter the Security Verification code, and then click Send. Click Close.
- 6. Wait until you receive an email that includes instructions to reset your password.
- 7. Click the link in the email that you received from Red Wing Software.
- 8. Enter the **Validation Code** which was included in the email. If you enter the code and it is not recognized, copy and paste the code from the email. The Validation Code expires in 24 hours.
- 9. Enter a New Password and then Re-enter the New Password.
- 10. Click Submit.
- 11. Click **OK**.

Q: How do I register CenterPoint?

A: When CenterPoint is first installed, you will be prompted to register the software. You can also access the Registration screen by selecting **Help > Product Registration > CenterPoint Registration** at the main CenterPoint menu. There are two options for registering the software:

Option A: Online Registration:

- 1. When CenterPoint is first opened on your computer it will display a Registration screen. Click **Online**.
- 2. The Registration Online form will be displayed. If you are currently a member of the Red Wing Software website, enter your **Email Address** and **Password**, then click **Login** to access the online product registration.
 - If you haven't registered on our website previously, click the Register link. On the Company Information screen, enter the required information, and then click Submit.
 - If you are currently a member of the Red Wing Software website and you forgot your login credentials, click the Forgot? link and complete the required information. You will receive an email with reset login credential information, complete the required information. After you reset your login credentials, enter your Email Address and Password, and then click Login to access the online product registration.
- 3. On the next Registration screen, your registration information will display, click Next.
- 4. Click OK.
- 5. On the next Registration screen, click **Email** to receive a copy of the information via your e-mail address. Save this email. Click **OK**. Then click **Close Form**.

Option B: Register Manually (use this option only if you do not have internet access on this machine)

Note: The Registration Key is supplied when the software is shipped to the customer. It is located on a bright colored piece of paper. If you are unable to find your registration key, please register online or contact Red Wing Software.

- 1. At the Registration screen, click on Manual.
- 2. On the **Registration Key Entry** screen, enter the registration key provided to you in the **Registration Key** field. Then click **Save**. When you enter the registration key:
 - It is not necessary to enter the dashes
 - Either upper/lower case letters can be entered
 - The letters I, Q, O and S will not be a part of the registration key. For example, all "0" characters are the number zero.

Q: How do I register the Federal/State Tax Forms (Aatrix)?

A. If you do not have an internet connection, you'll need to manually register your Federal/State Tax Forms (Aatrix) software. **One-Time Setup**

1. Within CenterPoint, select **Setup > Companies/Funds.** Select your company/fund and click **Edit.**

Note: If you have CenterPoint Payroll only, please go directly to step 5 in this section.

- 2. Click on the Additional Detail tab.
- 3. In the **Federal Tax Id** box, enter your Federal Identification Number.
- 4. Click **Save**. Click **Close**.
- 5. If you have CenterPoint Payroll also, click on **Setup > Payroll Details > Employers**.

Note: If you do not have CenterPoint Payroll, you can skip to the Register Aatrix Manually section below.

- 6. Select the appropriate **Employer** and click **Edit**.
- 7. Click on the **Taxes** tab.
- 8. Single click on Federal in the list of taxes on the upper left.
- 9. Enter the **Federal Tax Id** for this employer. Click **Save**.

Register Aatrix Manually (use this option only if internet access is not available)

- 1. Call Red Wing Software at 1-800-732-9464 and request an Aatrix Registration code.
- 2. Open CenterPoint
- 3. Select Help > Product Registration > Federal/State Tax Forms Registration.
- 4. Click Manual.
- 5. In the Aatrix Registration Key box, enter the key you were given by Red Wing Software (do not enter the dashes.).
- 6. Click Submit.
- 7. At the Registration Successful message, click OK.
- 8. Click Close.
- 9. Your Aatrix software is registered through the last day of the month of your Customer Care Plan anniversary date.

Q: How do I get updates for CenterPoint?

A: New releases of the program are available for download from our website and can be accessed from the CenterPoint program. You must own a Red Wing Software Customer Care Membership to download program updates and be connected to the internet to check for updates.

- a. Select **Help > Online Updates > Check for CenterPoint Updates**. Your version of CenterPoint and all add-ons are compared to the current versions available on the Red Wing Software website.
- b. If an update is needed on your machine, the **Online Updates** screen will be displayed with the Last Update Check date. The updates available for your Red Wing Software products will be displayed.
- c. Click Install Updates.
- d. When the download and installation are complete, click Launch CenterPoint.

If you prefer, you can setup a **Preference** that will customize the software so you are notified automatically that updates are available.

To set the preference:

- 1. In CenterPoint, select **File > Preferences**.
- 2. Select General > Online Update Settings.
- 3. In the Check for Updates Location, choose Internet.
- 4. Select personalized options for the remaining fields in the **Online Update Settings** screen.

Q: How can I get updates for CenterPoint Federal/State Tax Forms (not used with CenterPoint Depreciation)?

A: If you have an internet connection, you can check for updates on a regular basis by following the steps below. If you do not have an internet connection, Red Wing Software will mail you a quarterly Aatrix Tax Forms update CD, at your request, for an additional fee. Note: If an update is available when you print a federal/state tax form, a message will display.

- 1. Select Help > Online Updates > Check for Fed/State Tax Forms Updates.
- 2. Wait while the Updater starts and checks for the latest versions of the Federal/State Tax Forms (Aatrix).
- 3. If you need to update your system with the latest forms or reports, you will be notified and .you can decide if you want to **Automatically Update**, **Download the Update** to manually download an update from any computer with an internet connection, **Continue Expired**, or **Cancel** without updating Federal/State Tax Forms.
- 4. A list of necessary updates will display if you chose to update Federal/State Tax Forms.
- 5. Click **Next** to update your system.
- 6. When your system is updated with the most current forms and reports, the Update Complete screen will display, click **Close**.