

Installing CharityMaster on a new computer

The new computer is NOT on a LAN

If your computer is a stand-alone workstation (i.e. it is NOT connected to other computers with a Local Area Network (LAN)) in your organization's office:

1. Download the most recent version of CharityMaster from our web site and install it.
2. Locate your back end data:
 - a. If you are replacing a computer that can no longer be accessed, find the back up of this critical folder.
 - b. If the old machine can still be accessed, determine the location of your data and templates. (Click the **About** button on the **Home** tab to see the location.) Make a copy of *all* of the files in the back end location.
3. Copy all of the files from step 2 into the C:\CharityMaster folder. (You can move the back end location later.)
4. Start CharityMaster. The system will start in demo mode. Follow the instructions in the ReadMe file that was installed with CharityMaster to obtain a licence key for your new computer. (Click the Start button and look for the CharityMaster folder.)
5. Select the e-mail, signature and printing defaults on the **User Options** screen.

The new computer is one of several workstations on a LAN

If this computer is one of multiple workstations on a LAN (with each installation of CharityMaster "pointing" to the back end data stored on a server) then proceed as follows:

1. Download the most recent version of CharityMaster from our web site and install it.
2. Start CharityMaster. The system will start in demo mode. Follow the instructions in the ReadMe file that was installed with CharityMaster to obtain a licence key for your new computer. (Click the Start button and look for the CharityMaster folder.)
3. Select the e-mail, signature and printing defaults on the **User Options** screen.
4. Press the F12 function key and follow the directions on the screen to point CharityMaster to the back end database (**CharityMaster_be.mdb** or **CharityMaster_be.accdb**) on the server. (See "How do we move our database to a new location?" in the [support FAQs](#) on our web site.)
5. The version of CharityMaster that you installed on your new machine may be a later version than the ones installed on the other LAN workstations. In this case, when you "pointed" CharityMaster at the back end database on the server, it will update the back end database. If this is the case, you will have to update each of the workstations so they are all using the same version.

You access your database over the internet

You can install the main CharityMaster program on a computer and "point" CharityMaster to your database stored on a computer or server which is accessible over the internet

Since your data will be exposed to everyone on the internet, we strongly recommend that you protect

your data by using a Virtual Private Network (VPN).

1. Ensure that your VPN is set up on both the computer on which you are installing CharityMaster and on the computer where the backend database is stored.
2. Ensure that you have the exact internet address and credentials (user name and password) that will be necessary to access the location where the database is stored.
3. Download the most recent version of CharityMaster from our web site and install it.
6. Start CharityMaster. The system will start in demo mode. Follow the instructions in the ReadMe file that was installed with CharityMaster to obtain a license key for your new computer. (Click the Start button and look for the CharityMaster folder.)
7. Select the e-mail, signature and printing defaults on the **User Options** screen.
8. Set up a “network location” shortcut that “points” to the internet address of your back end database. Ask us for instructions on how to do this.
9. In CharityMaster, press the F12 function key and follow the directions on the screen to point CharityMaster to the shortcut for the network location where your back end database (**CharityMaster_be.mdb** or **CharityMaster_be.accdb**) is stored. (See “How do we move our database to a new location?” in the [support FAQs](#) on our web site.)