



Setting up on a local area network

Install CharityMaster on each workstation

System requirements

The system requirements for installation of CharityMaster are on our web site:

<https://charitymaster.com/system-requirements/>

CharityMaster was developed using Microsoft Access 2016 and requires that either that application be installed or that the Microsoft Access Runtime 2016 be installed. The FREE Access Runtime is installed automatically by the installer if the installer detects that Office 2016 is not installed.

We recommend that you DO NOT use WiFi to connect work stations to the back-end database – even on a LAN in the confines of your office. Wired connections are much more dependable and minimize the possibility of database corruption.

Files and file locations

The CharityMaster files are installed in three locations.

Program folder

A sub-directory (folder) of the Program Files directory which contains the main program file and the help files, etc. This is normally:

- C:\Program Files\Creditech\CharityMaster or
- C:\Program Files (x86)\Creditech\CharityMaster on a 64-bit operating system.

Database folder

A folder which contains your organization's database (the default file name is **CharityMaster_be.accdb**) and several Microsoft Word templates. The installed folder name is: "C:\CharityMaster."

AppData\Roaming

Each user will have a folder named CharityMaster in their (Hidden) AppData\Roaming folder. This folder contains a file called **UserOptions.mdb**. This file contains:

- E-mail program option and related e-mail settings used by this user
- Location and name of the back-end database.
- Settings for the QuickBooks interface (if purchased)
- The CharityMaster license setting.

Multiple accounts on the same computer

If the person installing CharityMaster on a workstation is an Administrator, they can elect to install CharityMaster so that it can be used by each user who has an account on that machine.

Licensing

CharityMaster licenses are machine specific which means that a separate license must be obtained and entered on each workstation. You can install CharityMaster on an unlimited number of workstations, but the license is limited to five concurrent users.

Instructions for obtaining and entering license keys are on our [web site](#).

Sharing the database

Once CharityMaster has been installed on each workstation, you will want to put the database (and the Word templates) in a location that can be accessed by all the computers on your network.

Copy the database folder to a server

The “server” can be either a Windows computer that functions just as a file server, or it can be a full featured server such as Windows Server 2008.

Copy the C:\CharityMaster folder (and all files) from one of the machines where CharityMaster has already been installed.

We recommend that the folder be placed in the root directory of the server to avoid connection strings that are excessively long.

Ensure that all users have read and write access to this folder.

“Point” each user to the database

Once the back-end database folder has been set up, start CharityMaster for *each user* and press the F12 function key key to set the new location / name of the back-end file. The default name is **CharityMaster_be.accdb**. Browse to the location of this file. Click on the data file name and then click 'Open.' The next time you start CharityMaster, it will connect to this file.

Should you have to move the back-end folder, CharityMaster will not be able to find these files. The "Back end data store not found" message will appear when you start CharityMaster. Click 'OK' and you will then be given the opportunity to indicate the new location / name of the back-end database.

If you move or rename the back-end file, each workstation on which CharityMaster is installed will have to follow the same procedure to reset the location and / or name of the back-end files.

Note that all the Word templates must be located in the same directory as the back-end data store. You MUST NOT change the name of any of the Word templates. (New ones can be added.)

Maintenance

Very little maintenance is required. The data storage file (CharityMaster_be.accdb) should be compacted periodically. A “Compact and Repair” process is done automatically every working day when the first person starts CharityMaster. However, this process cannot be started if another user is logged into CharityMaster. For this reason, all users should be encouraged to shut down CharityMaster at the end of each day.

Backup strategy

The only files that need to be backed up are those in the back-end data folder on the server. We

recommend that this folder and all its sub-folders be backed up daily.

Note that each time a “compact and repair” process is carried out at the beginning of each day, a copy of the database is created called **CharityMaster_be.bak**.

Program updates

Periodically we release updates with new features or bug fixes. Before the revised version is installed on *any* workstation, all users must be logged out of CharityMaster. We also recommend that a backup be made of the database file **C:\CharityMaster\CharityMaster_be.accdb** since we occasionally make changes to the structure of the database tables.

To simplify updating every machine, we also can provide you with a special installer that will automatically update each user’s machine when a new update is available.

Using Remote Desktop

If you wish to give users Remote Desktop access to CharityMaster running on your server, keep in mind that the CharityMaster program itself (**charitymaster.accde** which is installed in a Program Files folder) cannot be shared by multiple users. Therefore, you will have to create a full install for each user account on your server.