

# AccountMate®

## AccountMate 9.1 for LAN (Service Pack 1) Release Notes

September 30, 2016

AccountMate 9.1 for LAN (Service Pack 1) is provided to help keep your AccountMate installation up to date. This Service Pack must be installed on top of an existing AM9.1 for LAN installation.

### Installation File Contents

The AccountMate 9.1 for LAN (Service Pack 1) installer contains the following components:

- AccountMate 9.1 for LAN (Service Pack 1) Program Files

### Bug Fixes

Refer to the AccountMate 9.1 for LAN (Service Pack 1) **Product Release Summary** under the Maintenance and Technical Services section of the AccountMate Business Partner Home Page.

- [Sorted by Control Number](#)
- [Sorted by Module](#)

### Software Requirements

Before installing AccountMate 9.1 for Lan (Service Pack 1), verify that the servers and workstations meet the software requirements for installing and running AccountMate.

#### File Server Requirements:

The file server must meet the following minimum requirements:

Operating System: Windows Server 2012 R2 Standard Edition or  
Windows Server 2012 Standard Edition or  
Windows Server 2008 R2 Standard Edition (SP1) or  
Windows Server 2008 R2 Enterprise Edition (SP1) or  
Windows Server 2008 Standard Edition (SP2) or  
Windows Server 2008 Enterprise Edition (SP2)

Database\*: Microsoft SQL Server 2016 Standard Edition or  
Microsoft SQL Server 2016 Enterprise Edition or  
Microsoft SQL Server 2016 Express Edition or  
Microsoft SQL Server 2014 Standard Edition (SP2) or

Microsoft SQL Server 2014 Enterprise Edition (SP2) or  
Microsoft SQL Server 2014 Express Edition (SP2) or  
Microsoft SQL Server 2012 Standard Edition (SP3) or  
Microsoft SQL Server 2012 Enterprise Edition (SP3) or  
Microsoft SQL Server 2012 Express Edition (SP3) or  
Microsoft SQL Server 2008 R2 Standard Edition (SP3) or  
Microsoft SQL Server 2008 R2 Enterprise Edition (SP3) or  
Microsoft SQL Server 2008 R2 Express Edition (SP3)\*\* or  
Microsoft SQL Server 2008 Standard Edition (SP4) or  
Microsoft SQL Server 2008 Enterprise Edition (SP4) or  
Microsoft SQL Server 2008 Express Edition (SP4)\*\*

\* SQL Server holds Payroll data only and is required only when you install the Payroll module.

\*\* For Microsoft SQL Server 2008 R2 Express Edition (SP3) and Microsoft SQL Server 2008 Express Edition (SP4) users only: Before you install SQL Server 2008 Express Edition, you must install the .NET Framework 3.5 (SP1). For more information about the system requirements for SQL Server 2008 Express Edition, visit <http://www.microsoft.com/sqlserver/en/us/product-info.aspx>.

#### **Workstation Requirements:**

Each workstation that will be connected to the file server must meet the following minimum requirements:

Operating System: Windows 10 or  
Windows 8.1 or  
Windows 8 or  
Windows 7 (SP1)

**Note:** Hardware requirements will vary with the Operating System and SQL Server version you install. Please check out the Hardware and Software Requirements for the Operating System and SQL Server version that you plan to use with this AccountMate version. Provisions must also be made for any additional applications and files installed with AccountMate. For an updated software requirements list, visit our website at [http://www.accountmate.com/am9/lan\\_systemreq.asp](http://www.accountmate.com/am9/lan_systemreq.asp).

# Installation Guide

## Pre-installation Checklist

Use the following checklist as a guide prior to installing AM9.1 for LAN (Service Pack 1):

### 1. Correct Version

Verify that you have an AM9.1 for LAN installation on the file server where you want to install the AM9.1 for LAN (Service Pack 1).

### 2. Do Modifications Exist?

Your current AM9.1 for LAN system and data structure must be unmodified for AM9.1 for LAN (Service Pack 1) installer to work. Installing the AM9.1 for LAN (Service Pack 1) will remove any modifications in your current AccountMate installation.

**Do not proceed** if your current AccountMate installation or data structure was modified. Instead, e-mail our Development Consulting Service, [devconsulting@accountmate.com](mailto:devconsulting@accountmate.com), to ask how you can modify the AM9.1 for LAN (Service Pack 1) installer to work with your modified AccountMate installation or data structure. Regular consulting charges will apply.

### 3. Administrative Rights

Verify that you have administrative rights to the computer where you want to install AM9.1 for LAN (Service Pack 1).

### 4. Rename Folders

In the file server where AM9.1 for LAN is installed, rename the **Patches** and **Modifications** folders in the AccountMate root directory prior to installing AM9.1 for LAN (Service Pack 1). During the AM9.1 for LAN (Service Pack 1) installation, a new **Patches** folder will be created in the AccountMate root directory. If you purchased and modified source code, you need to manually create the **Modifications** folder in the AccountMate root directory **after** AM9.1 for LAN (Service Pack 1) is successfully installed.

### 5. Backup

Back up the entire AM9.1 for LAN installation folder. If you have the Payroll module, back up also the Payroll-related databases in SQL Server/Express. In the event that the AM9.1 for LAN (Service Pack 1) installation fails or you decide to postpone it, you can delete the AccountMate application folder and SQL databases (if applicable) used in the failed installation. You can then restore the files from your backup (both AccountMate folder and the databases) and either retry or reschedule the installation. **DO NOT SKIP THIS STEP!**

## 6. Exit All Programs

Exit all Windows programs and other AccountMate programs before starting the installation.

## Quick Install Guide

1. Double-click Setup.exe in the AM9.1 for LAN (Service Pack 1) installer file package to display the AccountMate Setup window.
2. Click Next to display the Choose Destination Location window. Specify in this window the location where AM9.1 for LAN is installed. In the event that AM9.1 for LAN is installed in a location that is different from the default destination folder; click the Browse button to open a Choose Folder window and then select the folder where the AM9.1 for LAN is installed.
3. Click Next to proceed to the Setup Type window. Choose from the following installation types:
  - a. **Workstation** – to install run-time files only. This type is recommended for workstation installations to run AccountMate 9 for LAN from a mapped folder to the file server.
  - b. **Server** – to install the AccountMate application and Administrator program files, the run-time (system) files, your product key and other available application components. This type is required for file server installations.
4. If you chose the Server Setup, the installer will display the Product Key window when you click "Next". You may leave the Product Key window blank and proceed to the next window by clicking "Next".

**Note:** *If you must provide the product key (e.g., you purchased source code), enter the 25-character AccountMate Product Key that was supplied to you upon purchase of AM9.1 for LAN. If the product key you enter is invalid, AM9.1 for LAN (Service Pack 1) will not be installed. Contact your AccountMate Solution Provider or AccountMate Customer Service if you have problems with your Product Key.*

5. Click Next to proceed to the Select Components window.
6. In the Select Components window specify which components you want to install:
  - 6.1. Program Files – installs these two components:
    - 6.1.1 AM9.1 for LAN (Service Pack 1) executable files that allow you to run the main AccountMate program and all its relevant functions and reports.

6.1.2 AccountMate Administrator program which is needed to activate the AccountMate modules, install license file, create companies in AccountMate, and manage group and user access rights, among other functions.

6.2. Run-time Files - installs the Crystal Reports and Visual FoxPro run-time libraries (DLL's) necessary for running various AM9.1 for LAN functions and reports. This option is automatically chosen; this setting can no longer be changed.

6.3. Source Code Files – a third option, "Source Code" will be displayed when you have entered in the Product Key window an AccountMate Product Key that includes any source code. Beneath the "Source Code" option is a list the modules for which you purchased source code. Mark the checkbox beside each module to install the source code files into the specified destination folder.

**Note:** *The Source Code option will be unavailable if you did not enter a valid Product Key or if the Product Key you entered excluded source code.*

7. Click Next to start the installation; then, click Finish when the installation is complete.
8. Launch the AccountMate Administrator program to update the System Manager files.
9. Launch the main AccountMate program. If you have the Payroll module, automatically download and install the latest Payroll Subscription Program by clicking the **Check for Payroll Subscription Updates** function from the **Utilities** menu.
10. Close the AccountMate program.

## **Differences among Service Pack, Build and Version Releases**

To avoid ambiguity and to make it easier for you to understand what are the differences among a Service Pack, Build, and Version releases; we explain these differences in the following paragraphs:

### **Service Pack:**

- A single batch of fixes that cannot wait until the next Build or Version release
- Excludes product enhancements
- An installer is available in order to easily apply to the AccountMate installation the fixes for anomalies/program inconsistencies.

**Note:** *There may be no need for a Service Pack release between Builds.*

**Build:**

- A product release that contains not only fixes for anomalies/product inconsistencies but also product enhancements. These enhancements may be improvements to the features and/or functions.
- Builds are associated with the current shipping AccountMate version of each platform (e.g., AM9.4 for SQL, AM8.3 for SQL, AM9.1 for LAN, AM8.3 for LAN)

**Version:**

- A product release that contains major changes to the technology, platform, features and/or functionality from the previous version.

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