CLARITY

Quick Start Installation Guide (CAN)

v.2.0

Last updated October 2021

Table of Contents

This quick-start installation guide was written for professionals who understand networking and file-sharing and has the permissions to properly install and configure Clarity for you. **We strongly recommend sharing this file with the person who handles your IT in your organization to assist you in installing and setting up Clarity.**

This guide was written for users who are setting up Clarity and Microsoft SQL Server 2014 **for the first time only**. If you already have the full Microsoft SQL server package or would like to install a newer version, please refer to the *Clarity: Custom Microsoft SQL Server Installation User Guide*. For more information about Clarity compatibility with different versions of Microsoft SQL Server, please visit our knowledge base or contact our support team.

Minimum System Requirements

- Microsoft Windows Operating System 8.1 or higher
- Microsoft Windows Server 2012 (or R2), 2016, or 2019
- Microsoft .NET Framework 3.5 Service Pack 1 (full package)
- Administrative user privileges (full read and write control)
- Microsoft Edge Browser version 94.0.992.50 or higher
- 2.4GHz processor or higher
- At least 8GB of RAM for a 64-bit application
- At least 2.5GB disk space recommended (additional space required for data files)
- Recommended screen resolution of 1280x1024 or higher. Clarity supports one workstation monitor, plus up to two extended monitors.

Pre-Requisites

- Have reviewed and confirmed that you meet the *Minimum System Requirements* above
- Disabled any anti-virus software *(you may reactivate it after the installation)*
- Disabled any firewall software *(you may reactivate it after the installation)*
- Identified if your operating system is 32-bit or 64-bit
- Downloaded and installed Microsoft Framework 3.5 Service Pack 1 (full package)

Downloading Clarity & Microsoft SQL Instance Media from Paymate's Customer Portal

1. Navigate to Paymate's customer portal at https://customer.paymatesoftware.com.

2. Log into Paymate's customer portal with your credentials. Your username is a six-digit number that begins with a '1'.

> If you do not remember your credentials to your customer account, you can use the "Forgot Password?" link. If you do not remember your registered email address, please contact our support team.

3. Scroll to the bottom of the page until you see the *Your Products* section.

4. Click on the **"Download"** button for Clarity.

5. Scroll to the bottom of the page until you see the *Current Downloads* section.

6. To download the Clarity .EXE file, click the **"Download"** button next to '*20XX – Clarity Canadian (20XX tax tables)*'.

7. To download the Microsoft SQL Instance Media (2014), click the **"Download"** button next to '*SQL 2014 Express Installation*'. Be sure to download the correct one for your operating system (32-bit or 64-bit).

Installing Clarity

1. Identify where you downloaded the Clarity .EXE file from the previous section.

   The default name of the application file is "CLARITYCAN.exe".

2. Right-click on the Clarity .EXE file.

3. Click **"Run as Administrator"**. This will begin the installation of Clarity on your computer.
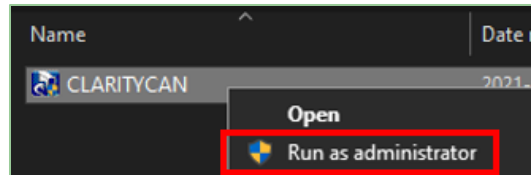
4. Click **"Next"** to proceed through the installation wizard.

5. After reviewing the 'License Agreement', click **"Yes"** to continue with the installation.

   If you click **"No"**, the installation will not continue.

6. Enter your username and company name.

7. Select the folder that you would like to install Clarity on. By default, it will be installed into your C: drive.

   We strongly recommend accepting the installation in the default folder, as this will expedite any support calls that you make to our support team.

8. Click **"Next"** to begin copying files into the selected folder.

9. Once the installation is complete, click **"Finish"**.

   DO NOT run the Clarity program before following the steps for installing Microsoft SQL Server 2014 onto your computer in the next section.

Installing Microsoft SQL Server 2014

> ⚠️ You must install Clarity and Microsoft Framework 3.5 Service Pack 1 (full package) before installing Microsoft SQL Server.

1. Identify where you downloaded the Microsoft SQL Instance Media (2014) file from the previous section.

> 📝 **Helpful Tips** The default name of the application file "SQLServerExpress2014AKM.exe".

2. Right-click on the Microsoft SQL Instance Media (2014) file.
3. Click **"Run as Administrator"**. This will begin the installation of Microsoft SQL Server 2014 on your computer.
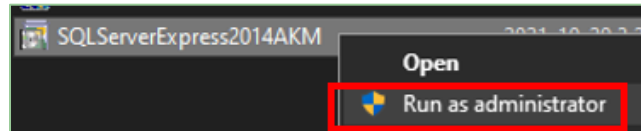
4. Click **"Next"** to proceed through the installation wizard.
5. After reviewing the 'License Agreement', click **"Yes"** to continue with the installation.

> ⚠️ If you click **"No"**, the installation will not continue.

6. Select a temporary folder to extract the installation files.
7. Click **"Next"** to continue.
8. Select a destination folder to install the Microsoft SQL Server.

> ⚠️ Microsoft SQL Server **must** be installed on a local drive.

9. Click **"Next"** to continue.
10. Verify the details of the installation. If anything is incorrect, click **"Back"** to fix the error.
11. Click **"Next"** to begin copying files into the selected folder.
12. Once the installation is complete, click **"Finish"**. The installation will configure the Microsoft SQL Server Instance.
13. Restart your computer.

> ⚠️ You must restart your computer after installing Microsoft SQL Server and before running the Clarity program.

Specifying Your License File Location in Clarity

Upon opening Clarity, you will be prompted to enter the location of your license upon opening Clarity for the first time.

1. Enter the location for your license file. Typically, this will be on your local drive.

   If you have multiple computers with Clarity installed, you must specify a location that all computers can access. You must also make sure that all users have complete read/write access to the location.

2. Click **"OK"** to save your changes.

Activating Clarity

When you are running Clarity for the first time, you must activate your product <u>once.</u> You will not need to activate it again later, even if you uninstall and reinstall Clarity on the same computer.

   You must have an internet connection in order to activate your Clarity license.

1. Navigate to Paymate's customer portal at https://customer.paymatesoftware.com.
2. Log into Paymate's customer portal with your credentials. Your username is a six-digit number that begins with a '1'.

   If you do not remember your credentials to your customer account, you can use the "Forgot Password?" link. If you do not remember your registered email address, please contact our support team.

3. Scroll to the bottom of the page until you see the *Your Products* section.
4. Click on the name of your product, Clarity.
5. Scroll down until you see the table grid of your activation keys.
6. Copy the <u>"Serial Key"</u>.

7. In Clarity, select "I have a serial number and I want to activate Clarity".
8. Click **"Next"**.
9. Paste the serial key you copied from Paymate's customer portal into the field.

10. Enter your company name and email address.

11. Click **"Next"**.

12. Clarity will use your internet connection to verify your serial key in order to activate Clarity for you. You will receive the notification if the activation was successful.

Activating Additional Modules

If you purchased additional features or modules, each of them is required to be activated before they can be used.

1. Return to Paymate's customer portal to view your activation keys.

2. Copy the key for the additional module you purchased.

3. In Clarity, navigate to Help > License Information.

4. Click **"Activation Key"**.

5. Paste the activation key that you copied from Paymate's customer portal.
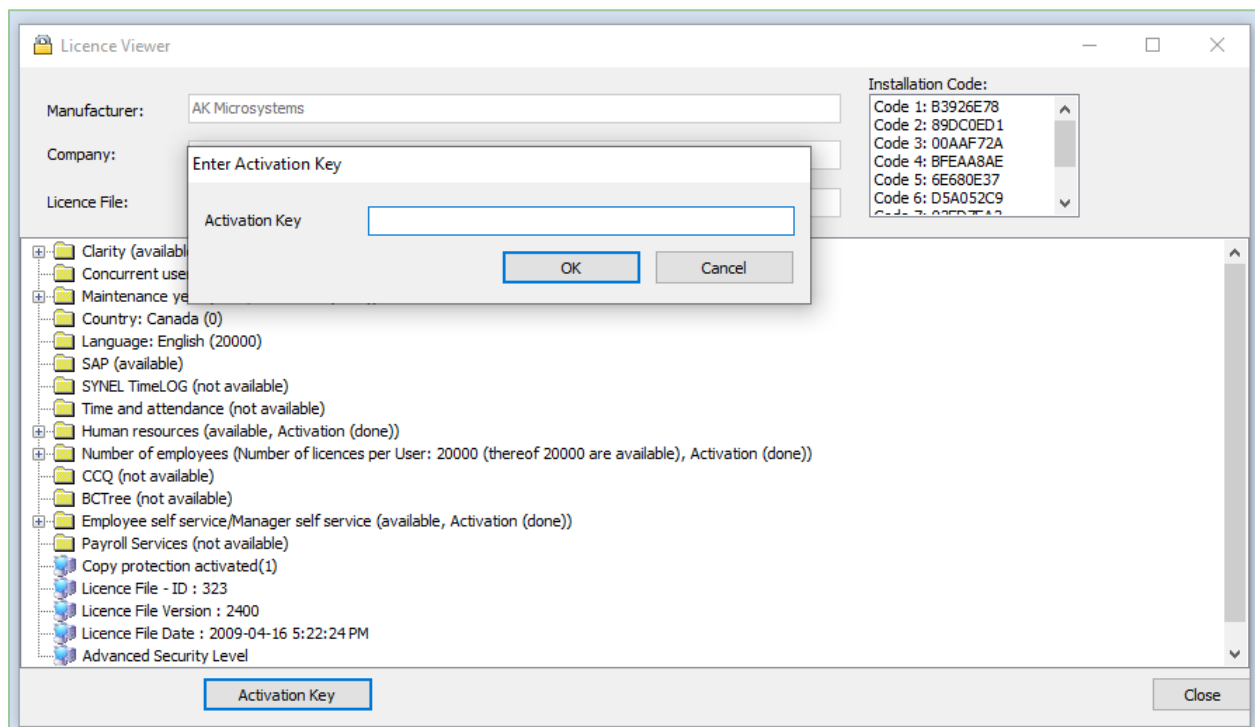
6. Click **"OK"**. You will receive a notification if the activation was successful.

7. Repeat steps 1 through 6 for each additional module that you purchased.

Configuring Clarity's Database

1. Identify where you downloaded Clarity.

2. Right-click on the application.

3. Click **"Run as Administrator"**. The login screen for Clarity will pop up.

4. Click **"Database Options"**.
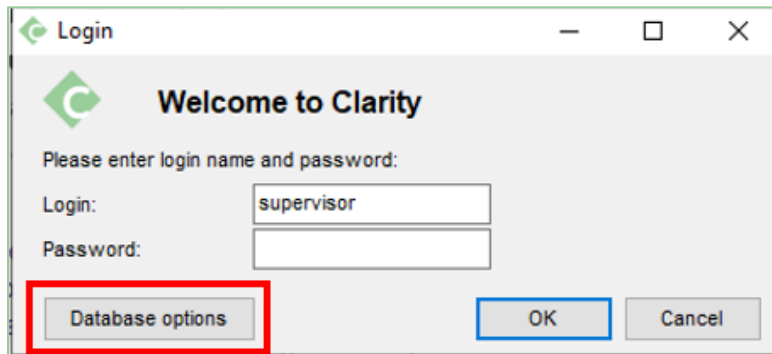
5. Double-check the _"Database Server Location"_.

If you have Clarity installed on one computer, you do not need to make any changes to this field. If you have Clarity installed on multiple computers, you will need to write this location name down from the original computer. On the other computers that do not have this Microsoft SQL Instance installed, you will need to overwrite this field to match the location name of the original.

6. Enter the _"Login"_ and _"Password"_ for your Microsoft SQL Server Instance. This is the same login and password to the Clarity program.

By default, the _"Login"_ is "supervisor" (without quotation marks) and the _"Password"_ is left blank.

7. Click **"Test Connection"** to ensure that you have entered the fields correctly and that the connection is successful.
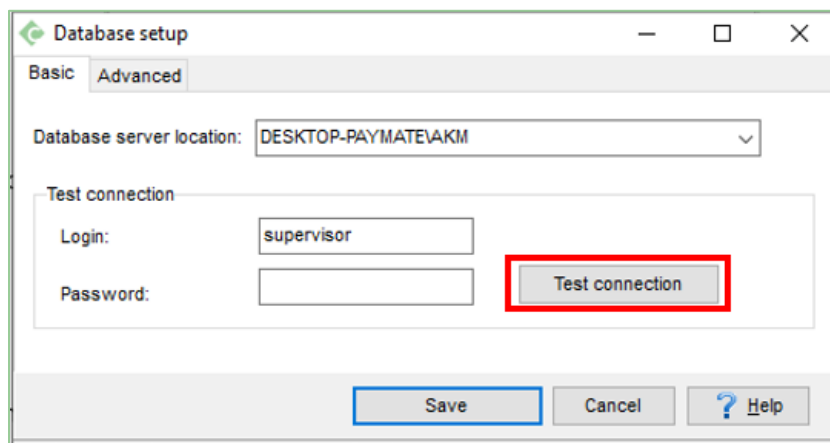
8. If the connection was successful, you will receive a notification indicating "Connection to database succeeded!". Click **"OK"** to close the notification. If the connection was not successful, repeat steps 5 through 7. If you still cannot connect to the database successfully, refer to the next section.

Troubleshooting an Unsuccessful Database Connection

We strongly recommend contacting your IT person to troubleshoot your unsuccessful database connection. Some solutions will require going into your sensitive settings.
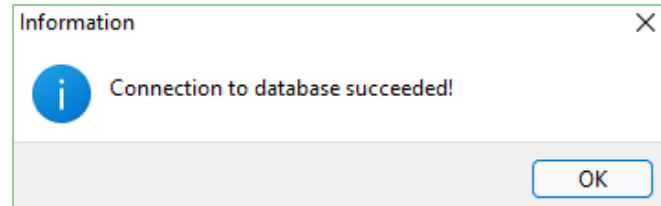
There can be a number of reasons why you were unable to successfully connect to the database. Ask yourself these questions:

1. Am I pointing to the correct *"Database Server Location"*?
Ensure that the *"Database Server Location"* is pointing to the correct location. If you only have Clarity installed on one computer, this field is populated by default. It is typically the name of your computer followed by the name of your Instance. If you have Clarity installed on multiple computers, refer to the computer where you installed Microsoft SQL Server and look at this same field in the Clarity program on that computer.

2. Are the *"Login"* and *"Password"* fields entered correctly?
The default *"Login"* is "supervisor" (without quotations marks), and the *"Password"* is left blank. If this is not your first time installing Clarity and you changed these credentials, please contact your IT person.

3. Is Microsoft SQL Server (2014) running?
    1. On your computer that has Microsoft SQL Server installed, navigate to Start > Programs > Microsoft SQL Server.
    2. Double-check to ensure that *SQL Server 2014 Browser* is running.
    3. If it is not running, click **"Start"** for the AKM Instance.
    4. If you cannot get Microsoft SQL Server to start, try uninstalling and reinstalling.

4. Do I have Microsoft SQL Server (2014) installed successfully?
Ensure that you have followed the steps in this guide to installing the Microsoft SQL Server .EXE file that you downloaded in Paymate's customer portal. If you already have an existing Microsoft SQL Server, please refer to the *Clarity: Custom Microsoft SQL Server Installation User Guide* instead.

5. Was an instance created in Microsoft SQL Server?

1. On your computer that has Microsoft SQL Server installed, navigate to Start > Programs > Microsoft SQL Server.
2. Click on Configuration Tools > SQL Server Configuration Manager.
3. Verify that "AKM" Instance exists under *SQL Server 2014 Services*.

6. Are the TCP/IP protocol enabled?

1. On your computer that has Microsoft SQL Server installed, navigate to Start > Programs > Microsoft SQL Server.
2. Click on Configuration Tools > SQL Server Configuration Manager.
3. Click on SQL Server 2014 Network Configuration.
4. Click on Protocols for AKM.
5. Ensure that *"TCP/IP"* is enabled.

Helpful Tips If you have configured the TCP/IP protocol and specified a port for the AKM Instance, ensure that your firewall settings do not block this port.

7. Is my firewall blocking my connection?

1. Locate your firewall software settings.
2. Disable your firewall and test the connection again.
3. Once you have successfully tested the connection to the database, create an inbound/allow rule within your firewall settings to allow for the AKM instance. You can reactivate your firewall.

8. Am I unable to connect to the database on my subsequent computers?

1. Run Clarity on your original computer.
2. Click **"Database Options"**.
3. Verify that the *"Database Server Location"* is correct. You can view nearby AKM Instances by looking through this dropdown field. Copy this field exactly into the same field on your other computers.
4. Enter the correct credentials and test the connection.
5. If you are still unable to connect, open the command prompt on your computer by clicking Start > Run.
6. Type in "cmd" (without quotation marks) and hit the 'Enter' key on your keyboard.
7. Type in "ping MYDATABASESERVER" (without quotation marks), where "MYDATABASESERVER" is the address of your server.
8. If this ping command cannot reach the server, this means you are unable to connect to your server. Contact your IT person to verify the connection between the computer and the server.
9. If this ping command succeeds, enter the IP address of the server in the *"Database Server Location"* field. For example, if your SQL Instance is on OFFICE\AKM and the IP of OFFICE is 192.168.0.1, try entering "192.168.0.1\AKM".

If you have verified all of the above and still cannot connect to your database, please review our knowledge base here:

https://helpdesk.paymatesoftware.com/display/CUSTKB/Error+SQL+Server+does+not+exist+or+access+denied+-+Invalid+login+name+or+password

If you still cannot connect to the database, please contact our support team.

Contact Paymate Support

Before you contact our support team, please refer to the below resources:

Paymate Knowledge Base: https://helpdesk.paymatesoftware.com/

Paymate's knowledge base contains a wide variety of help documents, guides, and how-to videos. We highly recommend browsing through our articles to fix an issue you may have.

Transferring Clarity Database:

https://helpdesk.paymatesoftware.com/pages/viewpage.action?pageId=5439513

Troubleshooting Errors for SQL Server:

https://helpdesk.paymatesoftware.com/display/CUSTKB/Error+SQL+Server+does+not+exist+or+access+denied+-+Invalid+login+name+or+password

If you are still experiencing difficulties or issues in setting up Clarity or Microsoft SQL Server, please contact Paymate's support team directly. We will be happy to help you and answer any questions you may have.

When contacting our support team, please include your six-digit customer ID and name of your company with a quick description of your problem.

Email us: Support@paymatesoftware.com

Visit us: www.paymatesoftware.com/contact