



Financial & Corporate Compliance

License Update Guide

CASH Suite™

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Introduction

This guide provides instructions for applying license keys and other tasks associated with license activation, including setting up new users and activating new products.

How license keys are obtained

Your license activation key(s) is provided by Wolters Kluwer Customer Support in an email message. The activation key(s) is contained in a text file (.TXT) included as an attachment to the email.

How license keys are distributed

There are two ways of using CASH Suite; in a multi-user environment with a common database or in a stand-alone environment (on your workstation).

Shared Database Environment

When running CASH in a multi-user environment in which users share a common database, the license keys are applied once from any CASH client. Once applied, the keys are stored with the CASH Database. As users launch CASH, the new keys are distributed to the license database located in the CASH program path.

NOTE: This distribution method requires the user(s) to have *modify* permissions to the file *SECURITY.MDB*. The file is located within the local program path, (e.g., *C:\Program Files (x86)\CASH*).

Stand Alone Environment

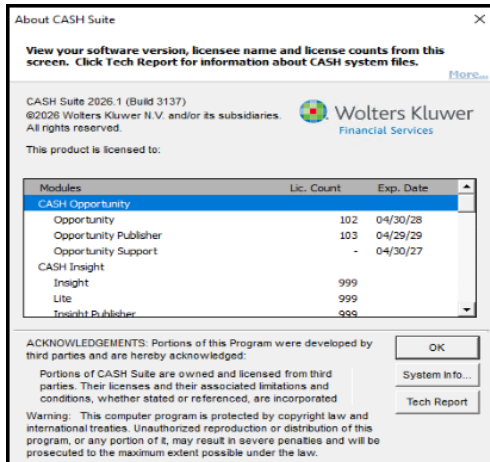
When running CASH in a stand-alone environment, the license key must be applied manually on each workstation.

How to determine your Software Version

When applying license keys, instructions vary with different software versions. Refer to the instructions below for assistance with determining your software version.

Running CASH to see my software version

If you can run CASH, launch the program and log in. Click **Help>About CASH**; the software version is clearly displayed on the *About* screen.



Unable to run CASH (my software has expired)

If you are not able to run CASH, open the *C:\Program Files (x86)\CASH* folder in Windows Explorer. In the program directory, find and open the *Release Notes*. The version is listed on page 1 of the *Release Notes*. The file name should read *ServiceReleaseNotes.pdf* with the version number appended to the filename.

The Release Notes are also available on the product download site:

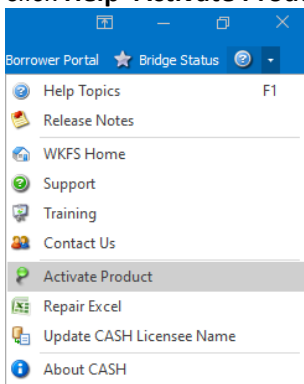
<https://compliance.download.wolterskluwer.com>

Applying License Keys in CASH Suite

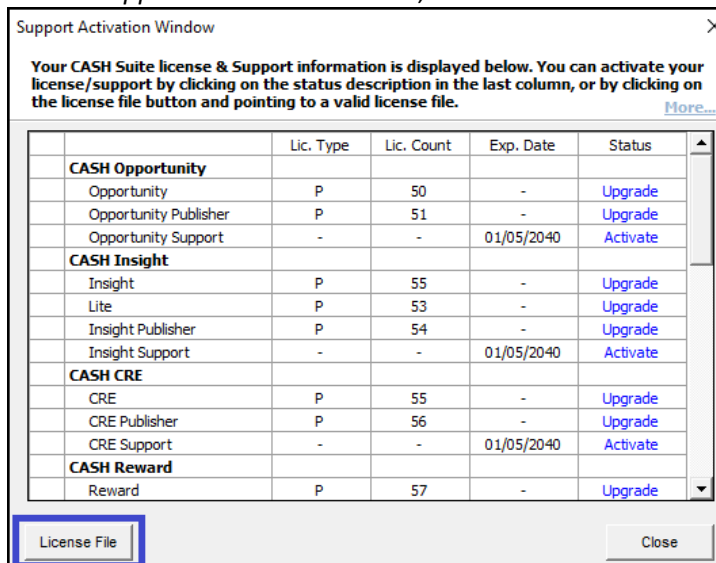
Your license activation key(s) is sent in an email message. The activation key(s) is contained in a text file (.TXT) included as an attachment to the email. Save this activation key .TXT file to a folder location accessible by the CASH client program. This may be a network drive, local drive, flash drive, or other file storage media.

To Apply License Keys

1. Open the CASH client.
2. From the CASH client, run the **CASH Dashboard**.
3. If prompted to update your license, click **Yes**. Otherwise, log in as an end user or administrator, and click **Help>Activate Product**.



4. On the *Support Activation* window, click **License File** in the lower left corner.



5. Using the Explorer Window, browse to the path that you saved the .TXT file to and click **Open**.
6. After applying, you can review your license status from the *Wolters Kluwer Support Activation* window.

NOTE: Proceed to the *Configuring the License* section if you are adding new products to your license.

Configuring the License

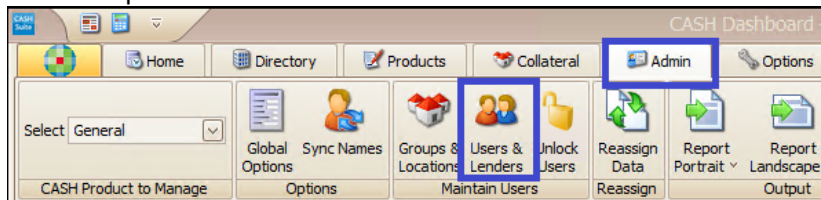
This step is applicable when applying a license key to:

- activate a new product.
- add new users to the system.

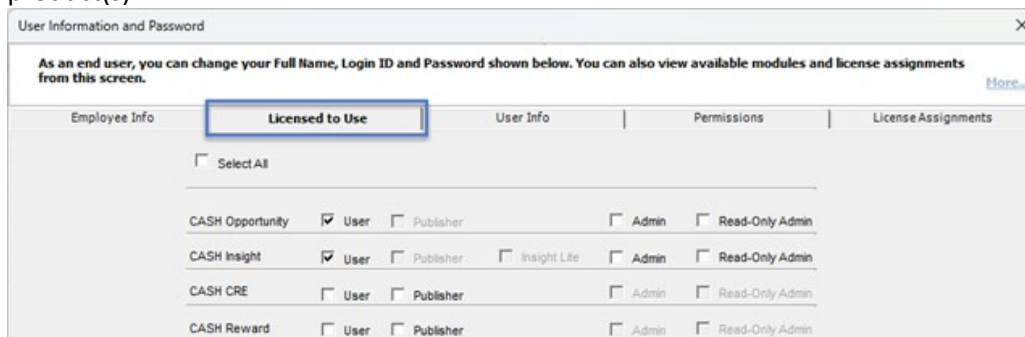
Note: This step is not required when applying a license key to extend your support subscription period.

Activating a new product in CASH Suite versions

1. Log into the CASH Dashboard as the Administrator and select the *Admin Tab* then the **Users and Lenders** option.



2. Highlight the user to modify and click **Edit**. Click the **Licensed to Use** tab and select the available products to add. Review the *Permissions* tab for security options that may relate to the newly added product(s).



3. Click **OK** to save the user license information.

Creating a new user in CASH Suite

1. Log into the CASH Dashboard as the Administrator.
2. In the CASH Dashboard, select the **Admin Tab** and then **Users and Lenders** option.

-
3. Click **Add** on the *User Maintenance* screen. Enter the information on the *Employee Info* tab, *Licensed to Use* tab, and *Permissions* tab as required.

User Information and Password

The fields that you can change include your Full Name, Login ID and Password. To change other options, please contact your CASH Administrator [More...](#)

Employee Info | Licensed to Use | User Info | Permissions | License Assignments

User Type

- User
- Lender
- User & Lender

4. Click **OK** to save the new user information.

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Customer Service: (800) 552-9410 Available Monday through Friday, 8:00 a.m. to 7:00 p.m., Eastern time.

CASH Suite SupportLine:

Phone: 800-274-2711 ext. 1125031

Available Monday through Friday, 8 a.m. to 8 p.m., Eastern time.

Email: cashsupport@wolterskluwer.com