

DENALI

SERVER AND CLIENT INSTALLATION GUIDE



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Chapter 1

Server and Client Installation

Before You Begin Installing Denali
Upgrading Your Denali Software
Installing Denali



This chapter covers the process you will use to install Denali. Our goal is to provide you the best possible information to help ensure a smooth installation of Denali. Refer to this chapter throughout the process or click the **Help** button in any of the installation windows to see more information about the various options in that window. If, after you complete the installation process, you have any suggestions or comments about this documentation, we welcome you to email them to us at documentation@cougarmtn.com.

Before You Begin Installing Denali

There are some steps you might need to take before you can install Denali. The information in this section provides some options you might need to implement depending on your system and the type of configuration you wish to install. We recommend you review all of this section to make sure your system is ready before you begin the installation process. Some of the information in this section might not apply to your system; in this case, skip to the next section.

It is also important to make sure you have the necessary system requirements before you install Denali. You can verify these requirements on our website at www.cougarmtn.com/system-recommendations.

Install All Windows Updates

You need to install all available Windows updates and restart your computer before you install Denali.

Disable User Account Control for Server Installations of SQL

We recommend if you are installing Microsoft SQL on a server, you disable the User Account Control (UAC). See the Windows documentation for more information about disabling the UAC.

Managing Administrator Rights and System Security

The information in this section applies to all systems and covers administrator rights and security you need to set before you install Denali. Please review this section to ensure your system is ready to begin the installation process.

System Administrator Rights

You need to make sure you have administrator rights on the machine that will act as the server. If you don't have rights, when you attempt to install Denali on the client machine(s), you will receive an error message that indicates access to the server is denied.

You must also have administrator rights for the user login on any machine on which you will install Denali or you will not be able to complete the installation. See your System Administrator to ensure you have the proper rights before you install Denali.

Once the installation is complete, Denali supports certain predefined roles that are installed with the operating system, such as limited user rights. You can launch and run Denali with limited user rights. For more information on user rights, refer to your Microsoft® documentation.

Firewall Adjustments to Allow Denali Installation

If you have firewall protection on any machine on which you will install Denali, you need to either temporarily disable the firewall or add exceptions before you begin the installation. You can do this through your Control Panel. After installation is complete, you can reactivate your firewall protection. Keep in mind that the information we present is based on Windows default settings and does not take into account any modifications you might have already made.

If you choose to add exceptions, depending on how you plan to set up your network configuration, you need to make sure the machine(s) that will have the various components are set as follows:

Installed Components	Required Exceptions
Database Component	Microsoft® SQL Server Desktop Engine
Server Component	DLLHost.exe and sqlbrowser.exe
Client Component	None
Denali License Manager	CMS License Server

For more information on these different components, refer to the Before You Begin Installing Denali user's guide. For more information on disabling/enabling your firewall and adding Windows firewall exceptions, refer to the Windows documentation that came with your operating system. If you have a firewall other than Windows, refer to the documentation that came with that program.

NOTE: If you are installing a system with multiple client machines, you will need to adjust your firewall on both the server machine and client machines during the installation process.

When you are prompted for a port number, you can choose any naming convention, but the recommended port numbers for use with Denali are listed in the table below.

Denali Component	Port Number
Denali License Manager	1492
SQL Express	1433

If you are prompted to select TCP or UDP, it's important to note that Denali only supports TCP communication.

Once you finish adding required exceptions, close the **Windows Firewall** window and continue setting up your machine(s) for the Denali installation (see "Before You Begin Installing Denali" on page 6), or begin the installation process (see "Installing Denali" on page 10).

Preparing to Connect to the SQL Server

You must obtain the computer name used by default when installing the SQL Server (see the Before You Begin Installing Denali user's guide). You can find your computer name in System Properties. Refer to the Windows documentation that came with your operating system for additional information on locating the name of your computer. If you install a system with multiple clients, you will use the same computer name and database for all machines.

We provide a log sheet to record all the information that you might need throughout the installation process on page 8.

Recording Your Denali Installation Information

Print this log and use it to record valuable Denali installation information that you might need throughout the process. We recommend you keep this log in a safe place for future reference.

Server Instance Name and Password

The server instance name is a combination of your computer name (see "Preparing to Connect to the SQL Server" on page 8) and the instance name you entered as the Instance Name and System Administrator Password when installing SQL Express (see "Problems with the Installation?" on page 20). Record your computer name; the default instance name and password are already recorded for you.

Computer Name	Instance Name	Password
	CMSDENALI	Password33!

Primary Server Settings

This table contains the default information used to connect to the SQL Server. If for any reason you change these settings, we highly recommend you record the changes for future reference.

Field Label	Information Entered
Database Type	Microsoft SQL Server 2005
SQL Server	<cpuname>\CMSDENALI</cpuname>
Database	COMPANIES
User Name	SA
Password	Password33!

Location of Denali Components

Use this table to record the location of the different components that are installed with Denali. This information is benefical if you are installing components on different computers.

Denali Component	Location of Component
Server	
Client(s)	

Denali Component	Location of Component
License Manager	
Database	

Additional Notes	
Use this area to record any other specific information about this installation process you n retain for future use.	night wish to

Upgrading Your Denali Software

If you upgrade Denali from a previous version, you must first post all transactions. We also highly recommend you back up your database before you install the newer version. Refer to the Controller guide for information on backing up your Denali data. After you back up your data, make sure you have your original installation information that includes the SQL server name, database name, user name, and password.

If you use Cougar Dtails, you will need to uninstall and reinstall the dashboards after you install the Denali upgrade.

If you are uncertain of any settings or options in a window, select the **Help** button for more information. If you are upgrading to Denali from CMS Professional, after you install Denali, refer to the Conversion guide for additional information and instructions.

Installing Denali

This section includes instructions to assist you through the entire installation process for Denali. The information here assumes you have already reviewed and implemented any necessary requirements for installing Denali. If this is not the case, before continuing please refer to "Before You Begin Installing Denali" on page 6. While Cougar Mountain strives to help ensure the highest level of security available within the software, it is still necessary to properly set your system security on all machines after installation. If you want to add additional clients after installing on this machine, see the Client Installation guide.

To install Denali:

- 1 Insert the Denali flash drive into a USB port or, if you downloaded the program, mount the .iso on a virtual drive.
- 2 Access the flash drive and double-click the .iso file. Or, if you downloaded Denali, access the virtual drive on your computer and unzip the Denali ZIP file. From there, you can double-click the .iso file. The main installation window appears and you can get information about Denali before you begin the installation process.
 - Release Notes: Select this option to review any last-minute information about this release of Denali.
 - Installation Guides: Select one of the options listed below the heading to open the guide for your
 installation type. The guides are in PDF format and are specific to each type of installation supported
 by Denali. You might want to save or print this guide for reference during the process; however, there
 is help available in each installation window which you can access by selecting the Help button or
 pressing F1 on your keyboard.
 - eDelivery: Select this to access information about eDelivery, which allows you to email invoices, statements, purchase orders, and pay stubs.
 - Denali BI: Select this for information about Denali BI, our Business Intelligence platform.
 - System Requirements: Select this option to view the Denali system requirements before you start the installation.
 - Customer Support: Select this option to access information about contacting Cougar Mountain Customer Support.
 - **Training**: Select this to learn more about the training and education options available through Cougar Mountain.



Figure 1: Denali Installation window

- 3 Click **Install Denali** to begin the installation process. Once you click this link, the system will automatically search for the following components:
 - .NET Framework 4.6
 - Windows® Installer
 - Microsoft® Database Access Component (MDAC)

If .NET Framework 4.6 is not installed, you will need to install it. You can access the .NET installation file from the Denali installation ZIP file (if you downloaded Denali) or from the Denali flash drive (if you received Denali by mail). If the Windows Installer or the MDAC components are not installed, or if they are not the latest versions necessary for running Denali, the system will install them for you. This process could take a few minutes. If the system installs or updates these components, you might be prompted to restart the computer.

4 After the system confirms that all components are installed, the InstallShield Wizard appears and you can continue with the installation by following the on-screen instructions.

If you need additional help, or if you encounter problems during the installation process, refer to "Troubleshooting and Available Help Resources" on page 19.

Step 1: Starting the Installation Wizard

Once the initial installation process is complete, the InstallShield Wizard will automatically begin and guide you through the remaining steps.

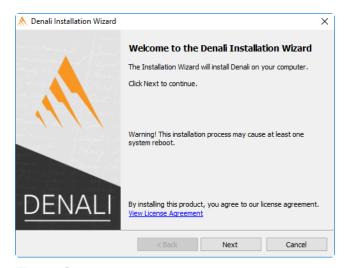


Figure 2: Denali InstallShield Wizard

Follow the on-screen instructions and use the information in this guide to help you decide which options to choose. Click **Next** to move to the next step after making any necessary choices in each window.

Step 2: Entering Your Company Information

In the **Company Information** window, enter your name, your company name, and for whom the software should be available.

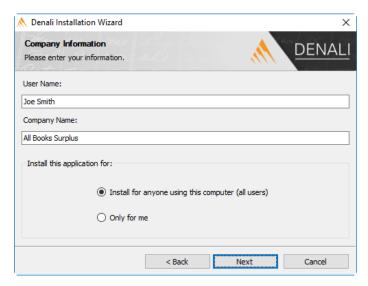


Figure 3: Company Information window

Step 3: Selecting Which Components to Install

In the Installation Options window, select the Server and Client option.

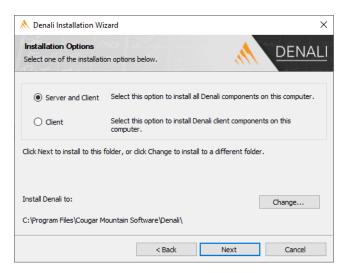


Figure 4: Denali InstallShield Wizard - Installation Options window

If you have an instance of SQL Server installed that is not named CMSDENALI or if you want to install the 32-bit version of Denali on a 64-bit machine, type Alt+A to open the **Advanced Settings** window.

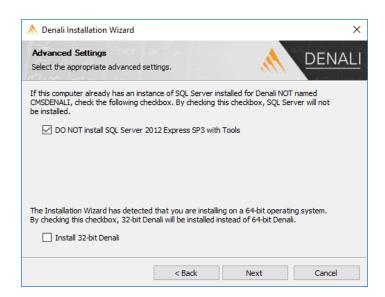


Figure 5: Denali InstallShield Wizard - Advanced Settings window

Select the check box so that a second instance of SQL is not installed and/or select the option to install 32-bit Denali. Click **Next**.

The Ready to Install Denali window displays the components that will be installed.

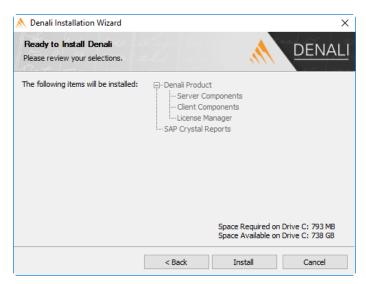


Figure 6: Denali InstallShield Wizard - Ready to Install the Program window

The system automatically assigns <CPUNAME>\CMSDENALI as the server instance name for this installation. A strong default password of Password33! is provided for you, but you can modify it using the SQL Management Studio Express tool.

For any questions or assistance on SQL Express, refer to the Microsoft documentation that accompanies the product.

Step 4: Completing the Installation

When the server installation is finished, the InstallShield Wizard Complete window appears.

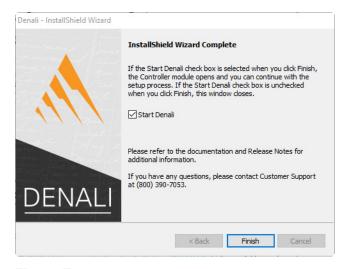


Figure 7: Denali InstallShield Wizard - InstallShield Wizard Complete window

You are now finished installing Denali. Leave the **Start Denali** check box checked and click **Finish** in this window.

Step 5: Installing the Denali Database

After you install the Denali components, you are ready to install the Denali database. The primary database includes a framework for any organization you install, as well as information such as the list of different companies you created.

The Connect to SQL Server window only appears if there is a problem connecting to the server. If it appears, enter the correct information to connect to your server. The default information is the instance name and password that was displayed in the Ready to Install Denali window. If you must modify the defaults, be sure to enter the computer name and instance name using a slash as a separator, so it would look something like this: *CPUNAME\CMSDENALI*.

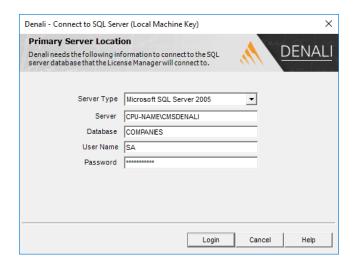


Figure 8: Denali Primary Server Location window

Once you enter the information in this window and click **Login**, the system will save the settings to the registry and validate the connection to the database server. If this connection is successful, the next window will appear. If the connection is unsuccessful, a message box will appear indicating the problem. For reference purposes, you can print the error information by clicking the **Print** button. See "Troubleshooting and Available Help Resources" on page 19 for additional assistance.

For specific information about the fields in this window, select the **Help** button or press F1.

Step 6: Setting Up the License Manager

The License Manager controls which users are in the system, and it ensures that the number of users doesn't exceed the number of user licenses. It does this by using the Product Key to verify the purchased modules and the User Key to identify the number of users permitted to access Denali at one time.

The server will use the license management information when installing the Denali License Manager, and the client will use this information to identify the License Manager. Enter your information in the **Customer Information** window, which is used to activate purchased products in future releases. Then, enter your keys in the License Manager window.

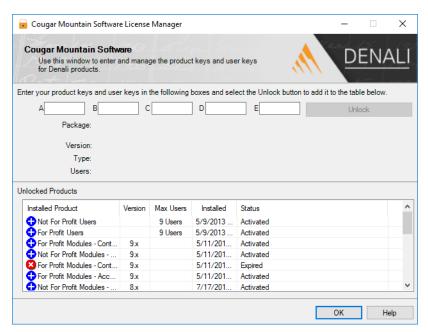


Figure 9: Cougar Mountain Software License Manager window

Step 7: Installing Demonstration Data

You must have at least one organization set up before you can use Denali. In the message that appears, select to either create your new organization or install the demonstration data. If you are new to Cougar Mountain products, we highly advise you install the demonstration database. If you choose to set up your own custom organization at this point, refer to the Getting Started and Controller guides.

You can use the demonstration organization to practice entering records and transactions so you can familiarize yourself with the program. You can use it to train employees so your actual data will be unaffected in the event of data entry errors. You can also set up this or another sample organization with the actual stock items and codes that you will use in your own organization to help you determine the best setup before creating your own database. You can even copy these items and codes to your own organization so you don't have to create them twice.

Once the installation of the demonstration data is complete, the **CMS Select Organization** window appears and you can select the organization you wish to open.

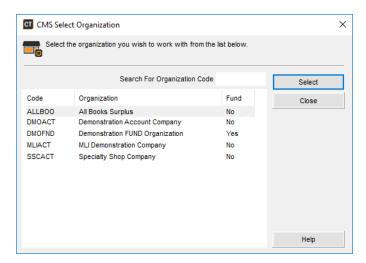


Figure 10: CMS Select Organization window

Any time a newer version of Denali is available, you will see a new version notice when you log in. You can click the link in the notice window to access the upgrade.

If you are upgrading to Denali from CMS Professional or another accounting software, refer to the Conversion guide for additional information and instructions before you begin creating or using your new organization.

Step 8: Completing the Denali Setup

If you want to add additional clients after installing on this machine, see the Client Installation guide. Keep in mind that although Denali has a high level of security built into the software, it is still necessary to properly set your system security on all machines. Remember to install any companion products (third-party software), such as Aatrix or TSheets, that you purchased to use with Denali.

It's important to create an exception in your anti-virus software to skip the Denali, SQL Server, and Aatrix folders when you perform virus scans. This will prevent components from being deleted which leads to problems in the software. The default locations for the folders are:

- 32-bit Denali: C:\Program Files\Cougar Mountain Software\Denali
- 64-bit Denali: C:\Program Files (x86)\Cougar Mountain Software\Denali
- 32-bit Aatrix: C:\Program Files\Aatrix
- 64-bit Aatrix: C:\Program Files (x86)\Aatrix
- SQL Server: C:\Program Files\Microsoft SQL Server\MSSQL10_50.CMSDENALI\MSSQL\DATA

If you want to set up desktop shortcuts to the Sales or Purchase Order modules, use CMSMA.exe for Sales and CMSPO.exe for Purchase Order.

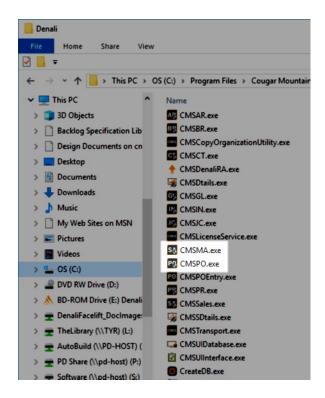


Figure 11: Denali software folder

When you are ready to begin using Denali, we highly recommend you review the following documentation first:

- Getting Started User's Guide
- Integration Guide
- New Features User's Guide
- Release Notes

Cougar Mountain Software also provides an extensive help system that you can access from within the software by selecting the **Help** button or pressing F1 in any window. You can also access the web help at cougarmtnservice.com/help/index.html. Refer to "Troubleshooting and Available Help Resources" on page 19 for more information on your available resources.

Chapter 2

Troubleshooting and Available Help Resources

Problems with the Installation?

Need Additional Help?



The purpose of this chapter is to provide additional assistance if you encounter a problem during the installation process or need additional help. We have provided various means to obtain help before contacting Customer Support and also offer a few training options to further enhance your knowledge of Denali.

Problems with the Installation?

At times, problems or errors can occur that are simple to fix without contacting Customer Support. Here we indicate some common problems and ways to correct them. If you would like to offer suggestions for additions to our Troubleshooting section, please email us at documentation@cougarmtn.com.

If you have this type of problem:	We recommend you try this:
I am unable to locate my primary database login password.	Contact Cougar Mountain Customer Support for assistance at (800) 390-7053.
The system is prompting me for my server login information when I launch Denali, even though during installation I chose to have this information written to the registry.	Check the server. You will receive the prompt window anytime the client machine cannot find the server. This could be due to it being offline or temporarily unavailable.
	If you upgraded your version of Denali, you need to reconnect the client machine to the server. To do this, select from the Start menu, Denali by Cougar Mountain > Denali Utilities > Client Utilities > Primary Server Location.
A message that indicates my client machine is trying to locate the server appeared.	This indicates that the server is unavailable. This occurs anytime the server is shut down. Once the server machine is available, your client will automatically connect. If your client does not connect within a reasonable amount of time, you might want to consult your System Administrator.
I want to enhance my network security by setting share rights.	One option is to set the share rights for the server drive to read-only.

Manual Removal of SXMLPARS.dll From the Global Assembly Cache

Refer to the instructions in this section if you receive one of the following errors after installing Denali on a server with at least one client.

- Unable to load one or more of the requested types. Retrieve the LoaderExceptions property for more information.
- Error connecting to CMSDenaliXMLParser (SXMLPARS.dll). Please contact your system administrator to ensure CMSDenaliXMLParser is running.

The cause of these errors is that the CMSDenaliXMLParser is placed in the Global Assembly Cache (GAC) and is not removed from the GAC when removing the CMSDenaliXMLParser application proxy from Component Services. You need to manually remove this application proxy from the GAC and reinstall the application proxy in the Component Services.

To resolve this issue with the application proxy:

- 1 To uninstall the proxy, select Start > All Programs > Denali by Cougar Mountain > Denali Utilities > Server Utilities.
- 2 Click the Window Utilities button and then select the GAC Viewer button.
- In the **assembly** window, locate the assembly **SXMLPARS** from the list, right click the file, and select **Uninstall** from the drop-down menu.
- 4 Select Yes. When the uninstall completes, close the assembly window and then close the Denali Windows Utilities and Denali Server Utilities menus.
- 5 To reinstall the proxy, select Start > All Programs > Denali by Cougar Mountain > Denali Utilities > right click on Server Utilities and select Properties.
- 6 In the **Target** field, place the cursor at the end of the string, press the spacebar once, and then type *icp*.
- 7 Select **OK** and then launch Denali.

If you still receive one of the previously listed errors, contact Customer Support at (800) 390-7053 for assistance.

Need Additional Help?

Cougar Mountain strives to provide the greatest amount of assistance possible to our users to ensure a positive experience. This section describes the various ways in which you can access the different levels of available help.

Documentation Help

You can find additional help when you access the online help system, the PDFs, and review the *Release Notes*. To access the online help, you can click the question mark icon or select **Help > Contents** from the menu bar. To access the PDFs, you can click on the Documentation page of the Customer Service Site at service.cougarmtn.com.

Online Help

Cougar Mountain Software has an online help system within the software that focuses on helping the user understand how to accomplish various tasks. The online help system is connected to the software and can be accessed while in the software; it is not accessed through the Internet. You can access the online help by clicking the **Help** menu from the menu bar and then selecting **Contents**. This help option can also be accessed by selecting the icon (question mark) on the toolbar in any Denali module.

Release Notes

Cougar Mountain Software provides release notes that include last-minute changes and technical issues that are not covered in other documentation. When you begin the installation process you can access the *Release Notes* from the main installation window.

If you already completed the installation process, you can access them from the Documentation page of the Customer Service Site at service.cougarmtn.com

Customer Support

If you come across a problem or an error message that you cannot resolve, call our Customer Support Specialists. Cougar Mountain Software maintains a full-time Customer Support staff specially trained to answer questions and solve problems about installation and operation of the software. You can receive technical support over the phone from Cougar Mountain Software, or you may be referred to a Cougar Mountain dealer in your area that can provide personalized local support. Cougar Mountain Software offers several annual support contract plans that allow you to get help when you need it.

The Customer Support department is open Monday through Friday. Depending on the call volume and anticipated wait time, you will either be transferred directly to the next available specialist, or you will be placed in a queue for your call to be returned by the next available specialist. You may also request a Customer Support Specialist to contact you through our online support (see "Contacting Customer Support" on page 22 for information). Visit our Customer Support Center online at: www.cougarmtn.com/support.

You can also visit the customer service site at http://service.cougarmtn.com to search for software updates that you can download. We provide this option so you can obtain the latest updates at your convenience. Your user name and password are located on a label on the back of the Denali folder you received from Cougar Mountain when your purchased the package.

Information to Gather Before Contacting Customer Support

When you contact Cougar Mountain Customer Support, please have your support number ready. This is typically your telephone number, with the area code first. You will also need to know your operating system, the Cougar Mountain product(s) you have purchased and installed, and the version of the product. To find your software version, in any Denali module, select **Help > About Cougar Mountain Software** from the menu bar. If you are not sure of any of this information, Customer Support can help.

Contacting Customer Support

Refer to the following table for various options available to contact a Customer Support Specialist for answers to your questions, or solutions to your software problems. You may also use one of these options to purchase an annual support contract, which will ensure you get the help you need when you need it most.

Support type:	Contact via:
Contact a Customer Support Specialist	(800) 390-7053
Purchase an annual contract	(800) 388-3038
Email questions to a Customer Support Specialist	techsupport@cougarmtn.com
Complete the online Call Back Request form to have a Customer Support Specialist contact you	www.cougarmtn.com/support Click on the Contact Customer Support link

Training

While Cougar Mountain Software is a comprehensive business accounting solution, the information you can get from the software will only be as good as the information you put in, and the more you know about the software's features and functions, the more you will be able to take advantage of all that the software has to offer. For this reason, we consider training to be a critical part of the learning process. We offer several different types of training—one or more is sure to meet your educational needs, time constraints, and budget. Contact Cougar Mountain Sales at (800) 388-3038 for your training needs.

Online Training

To ensure you get the most out of your accounting software, it is important that you understand all its capabilities. For this reason, as part of our Software Assurance program, we include the opportunity for you to participate in e-learning. This educational resource is offered online through the Cougar Mountain Customer Service Center (CSC) website (http://service.cougarmtn.com). Depending on the subscription you purchase, you can access a wealth of short presentations on various features of Cougar Mountain software. Because these presentations are accessed online, you can view a topic whenever it is convenient for you and/or your employees. For more information on this resource, contact your account executive at (800) 388-3038.

Classroom Training in Boise

We offer training classes on a regular basis at our corporate headquarters in beautiful Boise, Idaho. If you have only a few people to train, this is a great way to learn all that the software has to offer and how you can use it to its full potential. One of the benefits of coming to our training classes is that you will hear from other users of the software, which might remind you of issues that are important to you as well. Another benefit is that it removes you from the day-to-day tasks at your own office and allows you to concentrate more fully on the learning process. You can use this as a powerful tool to "train the trainer" – once the staff member(s) who attended the training arrive back home, they can teach other staff members the aspects of the software that they will need to know.

On-Site Training at Your Business

If you have more than a few people to train, you may want to consider on-site training. In this scenario, one of our professional trainers travels to your site and works with your employees. One advantage to this type of training is that you can train as many people as necessary without incurring additional costs and you can have specific people participate for specific sessions depending on their job duties. For example, during the training for Payroll, only those associated with handling your business' payroll need to be present. This will enable your organization less interruption in daily productivity. Another advantage of on-site training is that you can work with your own data and business practices while focusing on the specific needs of your business.

Telephone Training

Training can also be done over the telephone. Using network streaming technology, you and your employees can work with one of our professional trainers to focus on whatever specific parts of the software you choose. The trainer will be able to see your computer screen and you will be able to see theirs. This way you can work with either your own data or the demonstration data to learn how to best utilize the software for your business. This is a great solution if you have one or two modules that are new to you, and you want thorough training on them without travelling to our training facility or having a trainer come to you.

C

Client

An individual machine that includes the entry point to the application. This is the user interface side of the client/server architecture. The client can be on the same or a separate machine than the server, but it must communicate with the server in order for Denali to function.

O

Client Components

The client components handle information that is located on an individual workstation. These components install automatically if you select to install the client on any machine.

Context-Sensitive Help

Online explanatory text that is relevant to the current active window. Help is available throughout the software and changes with the screen and cursor position to coincide with the window. A **Help** button is available in most windows and the default help key is F1. (See also the *Online Help* definition.)

D

Database

For Denali, the database refers to the SQL server that holds the tables used by the software to store your company data.

Dedicated Server

A type of installation in which the server components are installed on one computer and the client components are installed on a separate computer(s).

Demonstration Company

This company database allows you to practice using the software in an environment where your company records will not be affected.

L

License Manager

This ensures that the number of users in the system does not exceed the number of purchased licenses. The License Manager uses the Product Key to verify the purchased modules and the User Key to identify the number of users permitted to access Denali at one time.

M

Module

One of the functional applications of Denali. The modules are Controller, General Ledger, Accounts Receivable, Accounts Payable, Sales (Order Entry/Point of Sale), Inventory, Payroll, Purchase Order, and Bank Reconciliation.



Online Help

Online instructional text that is relevant to the specific operation being performed. This help is designed based on the task at hand and can be accessed throughout the software. Select the question mark button on the toolbar or **Help > Contents** in any of the installed modules. (See also the *Context-Sensitive Help* definition.)

Primary Database This includes a framework for all the companies you create and/or install, as well as information such as the list of companies you create. This database is created automatically during the installation process. This key defines the modules you purchased and controls which modules are **Product Key** installed. It also contains product and version information. Server This side of the client/server architecture processes queries made by the client. The server can be on the same machine as the client or on a separate machine, but the two must communicate. **Server Components** The server components handle information requests made by the client. This can include looking up stock items or codes, retreiving information for reports, and posting. These components install automatically if you select to install the server on any machine. **Server Port** This is used to tell the license server and client components which TCP/IP port the license server is listening to on the server machine. **SQL** Structured Query Language. Denali uses this database language to retrieve and manage data. **SQL Express** The SQL database used by Denali. **SQL Management** This tool allows users to manage their SQL database information. Only experi-Studio Express enced users should attempt to access the database in this way. Stand-alone In this type of installation the server and client are installed on the same machine.

User KeyThis key is the identification number you receive when you purchase the software. It includes how many users are licensed to use Denali at one time. You will only receive this key if you purchase more than one user license.

W

Workstation see Client.

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7180 Potomac Dr. Boise, Idaho 83704 Sales: (800) 388-3038

Customer Support: (800) 390-7053 Forms & Supplies: (800) 454-1660

www.cougarmtn.com