# Installation User Guide

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## Contact Information

If you require further assistance, please contact Catalis.

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## Revision History

| Name | Date | Description | Version |
|---|---|---|---|
| Naomi Skopec | 7/23/2015 | Document Creation | |
| Sanjeet Singireddy | 7/28/2015 | Document Review | |
| Kyle Wilson | 10/12/2021 | Updated Notes | |
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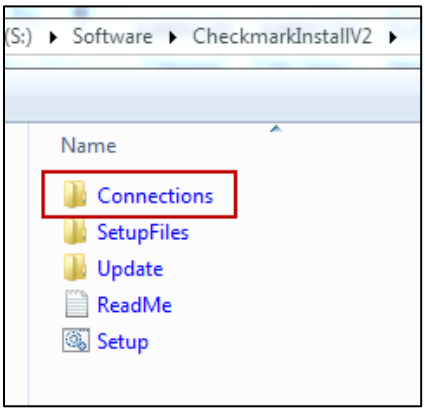
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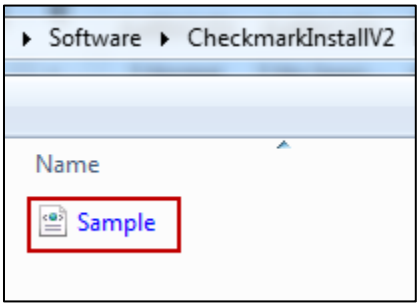


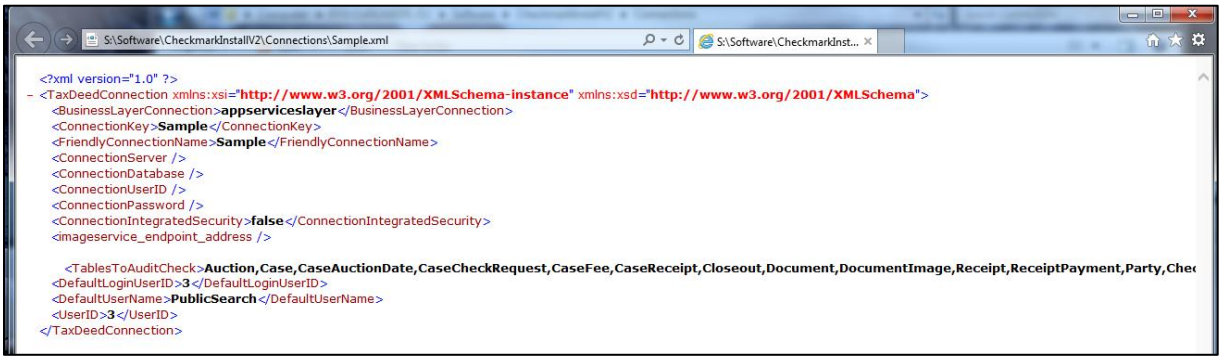
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## Installation Process

1. Copy the installation folder to C: drive. Depending on the network share, the installation folder must be run locally.
2. Before installing, the county will need to customize the following:
    a. Connections – Double click the connections folder. Inside there will be a Sample XML, edit this file. Enter in the Database name, SQL server name, usernames, and passwords, etc.



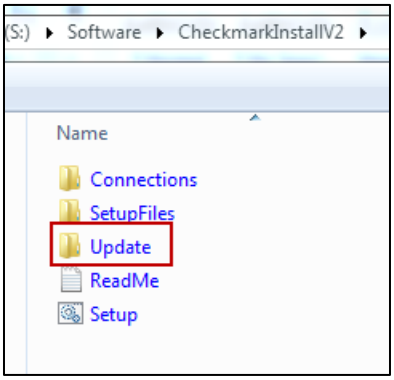




        i. If an error is received when trying to log in, there could be more than one connection xml with the same ‘ConnectionKey’.
        ii. Subfolders of ‘Connections’ and all the connection files are located here.
        iii. UserID for the website and services will run with that user’s rights and role. This user has to be created or else it will throw a silent error.
    b. Additional connection files can be added, if needed.



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3. TaxSmart Update
    a. This is where all the different files will be copied into when updating a version.




    b. Change the “AppVerDate.txt” file on the server to a more recent date so it will update all client machines who run the Updater.exe.

    c. Updater.exe.config
        i. This is the config file that needs to be configured to point to the server with the Taxsmart updater folder.



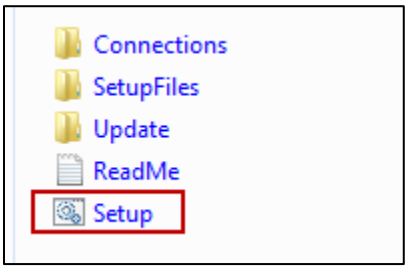

        ii. There is an example of how this setup should look. The file is called Updater.exe.config.sample

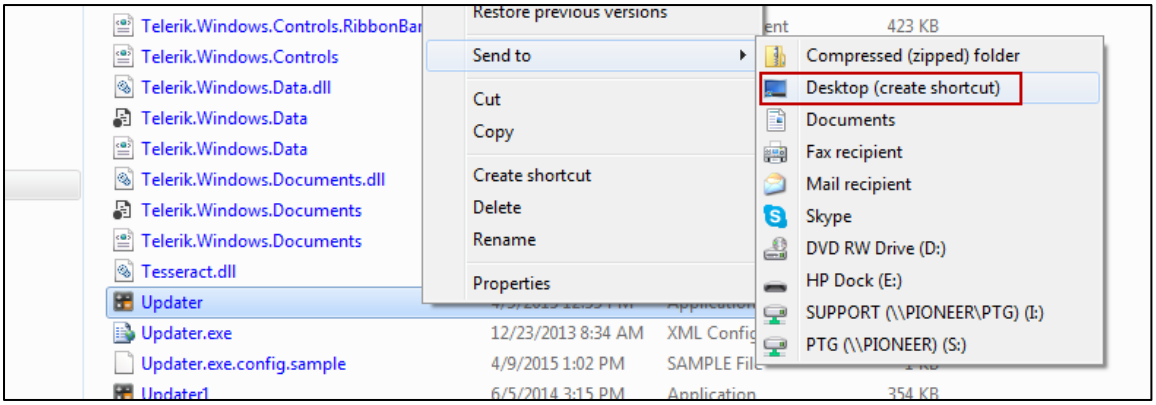




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4. Run the setup.bat as an administrator.
    a. Install what pops up: .net, the image viewer, Crystal Reports, the TaxSmart Install, etc.
    b. A shortcut will be created on the desktop, delete this and create a new shortcut that points to the Updater.







5. Linking Landmark and TaxSmart
    a. Both products must share a common connection in order for information to be pulled.

6. Open TaxSmart.






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