EazyEFT Installation Guide #5

Last updated 14 March 2022

Introduction

EazyEFT can be installed on a standalone machine to which no one else will have access, or it can be installed on a network server and accessed from multiple client machines. You **CANNOT** install two separate copies of EazyEFT on two separate machines pointing to two separate data files. This is prohibited by the terms of the Software License Agreement

This guide will explain a client type installation where your EazyEFT data is already stored on your server and you now want to access it from a new client machine. If you require a different type of installation then please select a different guide from our Installation Guides

If you are unsure which type of installation is best for your organisation, then please contact our Customer Helpline number above and we can advise accordingly.

Steps Involved

In order to successfully install EazyEFT on a new client machine, there are two essential steps that need to be carried out in sequence, as follows :-

1) Install EazyEFT on the new client machine.

2) Check that you can see your existing data on the server.

You **CANNOT** simply copy the EazyEFT folder from an existing client machine to another. This will **NOT** work. You must follow each of these two steps as outlined in detail below.

Requirements

Before you proceed, it is advisable that you download the latest version v3.0.0.0 of the EazyEFT installation program from our Downloads Page When downloading, if you are prompted to 'Run' or 'Save' we would advise that you choose 'Save', as you may need to run the installation program a number of times depending on which, if any, of the two prerequisites are already installed on your machine.

If you already have EazyEFT installed and working on one or more other client machines, then before you start, you should run EazyEFT on one of the existing client machines and go into Payments >> Files Created. When you click on 'Go' all the

previously created files will be listed. Make a note of the 'Internal Reference' of the most recent file. We will use this later to check that you can see the same data.

| Transfer File Type	Transaction Type	Internal Reference	Requested Date	Business To Business	File Creation Date	Number Of Transactions	Value Of Transactions
SEPA XML File	Debits	5000093	07/09/2016		02/09/2016 13:47	1	10.00
SEPA XML File	Debits	5000092	11/08/2016		03/08/2016 10:19	1	10.00
SEPA XML File	Credits	5000091	25/07/2016		25/07/2016 12:57	2	25.00

Prerequisites

Before EazyEFT can be installed on a machine, 'Microsoft .Net Framework 4.8' and 'Crystal Reports Runtime' must also be installed. If you are running Windows 10 or later, then 'Microsoft .Net Framework 4.8' will be installed already as part of the operating system. 'Crystal Reports Runtime' may or may not be installed already, depending on what other applications you have previously installed on the machine. The EazyEFT installation program will automatically detect if either of these two prerequisites are not installed and will guide you to the relevant download for each, if required.

Step 1 - Installing EazyEFT On A Client Machine

Very Important : If you already have EazyEFT installed and working on one or more client machines, then before doing the install on the new machine, you will need to ensure that ALL your existing machines have been updated and are already running the latest version v3.0.0.0. You **CANNOT** have different versions of EazyEFT on different machines. All machines **MUST** be running the same version. If you do install a newer version on the new client machine, then all your existing machines may be prevented from running EazyEFT, until they have been updated to the same version.

1.1) First ensure that you are logged into the local machine as the Administrator (or equivalent).

1.2) Right click on EazyEFT-SEPA-Edition-Install.exe and select 'Run as administrator' (as shown below). If prompted by User Account Control, click 'Yes' to allow the installation program to run with full administrator permissions.
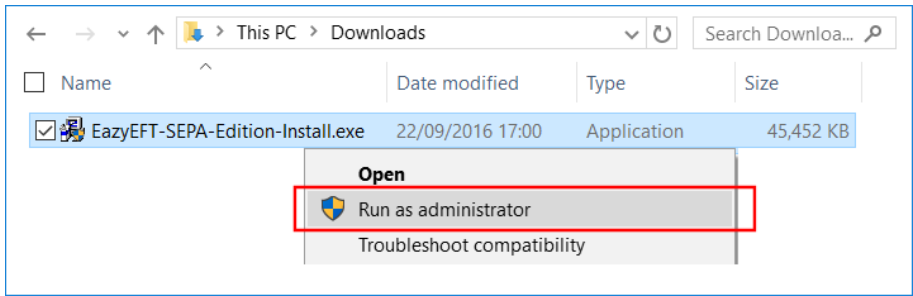
1.3) The 'Welcome' screen should now be displayed. Click on 'Next'.

1.4) Read the terms of the software license agreement. If you agree, click on 'I Agree'.

1.5) When prompted 'What would you like to do ?', ensure that 'Network Install - Client' is selected (as shown below).
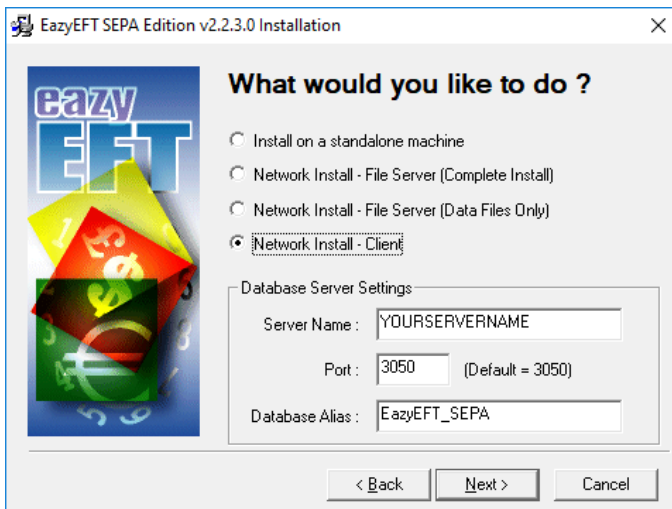

1.6) Ensure that the correct server name is entered. This should be the same server name that was displayed when you initially installed EazyEFT on the server. If you do not know what the correct server name is, but you already have EazyEFT installed and working on an existing client machine, then you can run EazyEFT on this existing machine, click on Tools >> System Information in the Utilities section and make a note of the 'Server Name' displayed.

Note : When entering the server name do NOT use UNC notation (e.g. *\\YOURSERVERNAME* is incorrect and will not work). Just enter the machine name of the server without any leading backslashes (e.g. *YOURSERVERNAME*).

Once you have entered the correct server name, click on 'Next'.

1.7) At this stage the installation program will check if the two prerequisites mentioned above are installed. If a message similar to the one below appears, then this means that the first prerequisite, 'Microsoft .Net Framework 4.8', is not installed on this machine. If this message is not displayed, proceed directly to step 1.8 below.
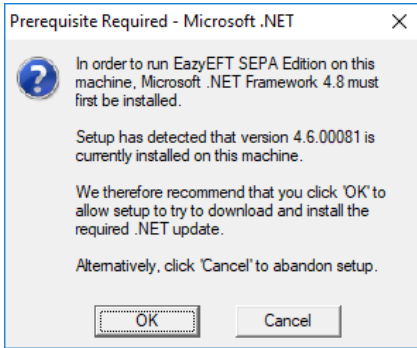
By clicking on 'OK' the EazyEFT installation program will begin to download and automatically install the 'Microsoft .Net Framework 4.8' from the Microsoft website. This may take a few minutes so please be patient. Once 'Microsoft .Net Framework 4.8' is installed, the EazyEFT installation program will automatically proceed to step 1.8.

1.8) If a message similar to the one below appears, then this means that the second prerequisite, the required 'Crystal Reports Runtime' files are not installed on this machine. If this message is not displayed, proceed directly to step 1.9 below.
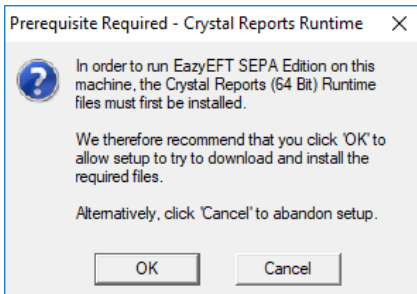
By clicking on 'OK' the EazyEFT installation program will begin to download and automatically install the 'Crystal Reports Runtime' installation program. This may take a few minutes so please be patient. Once the 'Crystal Reports Runtime' files have been installed, the EazyEFT installation program will automatically proceed to step 1.9.

1.9) If the select 'Destination Folder' screen is displayed (as shown below), then this means that the two prerequisites are in fact installed and the EazyEFT installation program can continue, so just click on 'Next' to accept the default destination folder.
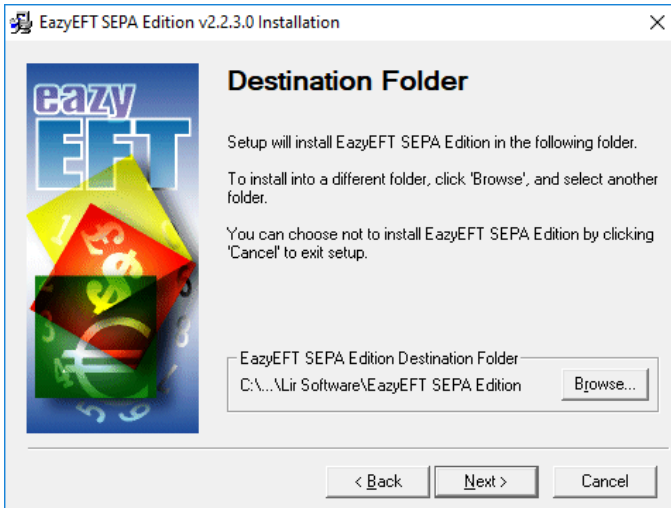
1.10) Click on 'Next' to accept the default 'Program Manager Group' of EazyEFT SEPA Edition.

1.11) When prompted with 'Start Installation', click on 'Next'.

1.12) When 'Installation Complete' is displayed, click on 'Finish'.

1.13) You should now be able to run and log in to EazyEFT by clicking on the EazyEFT SEPA Edition icon on your desktop.

1.14) If this is the first client machine that EazyEFT has been installed on, then when prompted, enter the default 'User Name' and 'Password' that were provided in the confirmation email that you should have received after you downloaded the EazyEFT installation program.

If on the other hand, you already have EazyEFT installed and working on one or more other client machines, then you can use your existing logon credentials.

1.15) If EazyEFT is being run for the very first time, it will need to build the database and do some initial configuration. Just click on 'Ok' if prompted.

1.16) When the EazyEFT 'Main Menu' and 'Home Screen' are displayed, then you have successfully installed EazyEFT on the client machine.
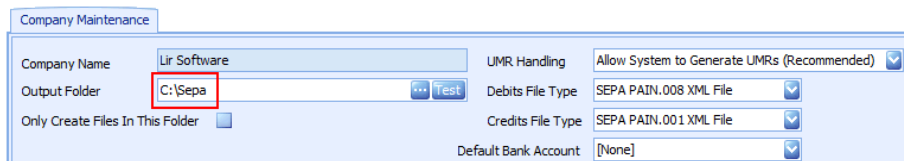
Step 2 - Check Existing Data

To check that you can see your existing data, go into Maintenance >> Customers (or Suppliers) and check that all your Customers (or Suppliers) are listed.

Next go into Payments >> Files Created and click on 'Go' and make sure that all your previously created files are listed. The 'Internal Reference' of the most recent file

displayed should match the 'Internal Reference' that you noted from the Requirements section at the start of this document.

Now that you can see your existing data, you need to check that you have access to your 'Output Folder'. To do this go into Set Up >> Company Maintenance.

If the output folder is a local folder as shown above (i.e. starts with C:\), then please note that this is **NOT** recommended for a client / server type installation. Instead you should use a shared folder on your server (e.g. '*yourservername\company shared folder\SEPA*'). That way, regardless of who creates the file on whatever machine, the file will always be created in (and uploaded from) the same place.

You can click the 'Test' button, to check that the specified folder does in fact exist and that you have the required access rights to the specified folder.

If having followed the above steps and you are still having an issue installing EazyEFT, then please contact our Customer Helpline number above.