WHITE PAPER

Date: **JAN 2013 (updated December 2024)**
Number: **WP01132013**
Author: **MRC**
Product: **W.I.S.H.**, **Visual Grasp Accounting Software, VG-CRM, VG Cdn Payroll**

Versions: **All Current versions**
Subject: **Upgrading from previous annual version, licensing your product,**
obtaining and **applying your new license keys**

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INTRODUCTION

This document will show you how to download and license your product. Some products require that license keys be installed when you install the program for the first time or when you upgrade to a newer version.

IMPORTANT: This document is a generic document covering a procedure that is similar for most of our products. For this reason the screens may look slightly different depending on the version and product that you are licensing. While the screens may differ slightly, the process is essentially the same. If you have any questions or difficulty, contact our support department at 1-877-759-6783 or support@grasp.ca.

DOWNLOADING THE INSTALLATION FILE

When you are installing the program for the first time or when you are advised that there is an updated version of the program that you want to install the FIRST STEP is to obtain the installation file from the grasp.ca corporate website.
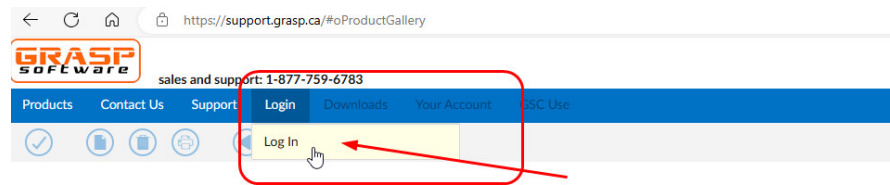
To be able to do this, you will need your company's/organization's customer login code and corresponding password. These are generally printed on any invoice that was sent to you but you can also obtain this by using the "Forgot Password" button on our corporate website. Only valid email addresses who have been set up in our system will be able to retrieve lost or forgotten passwords. Of course you can always contact us for help too.

1. Go to the website: www.grasp.ca

Click on the **Sales and Support** link.

Click the **Log In** option on the **Login** menu.

After clicking the Login button, the Login window will pop up. Log in using the email address that we have on file for you. If you are unable to log in, it means that you are not set up to log in to our website and need to contact us at sales@grasp.ca for help getting set up.

Of course, you will also need to enter your password. If you have forgotten your password, there is a password reset button that you can click to have a new temporary password emailed to you.
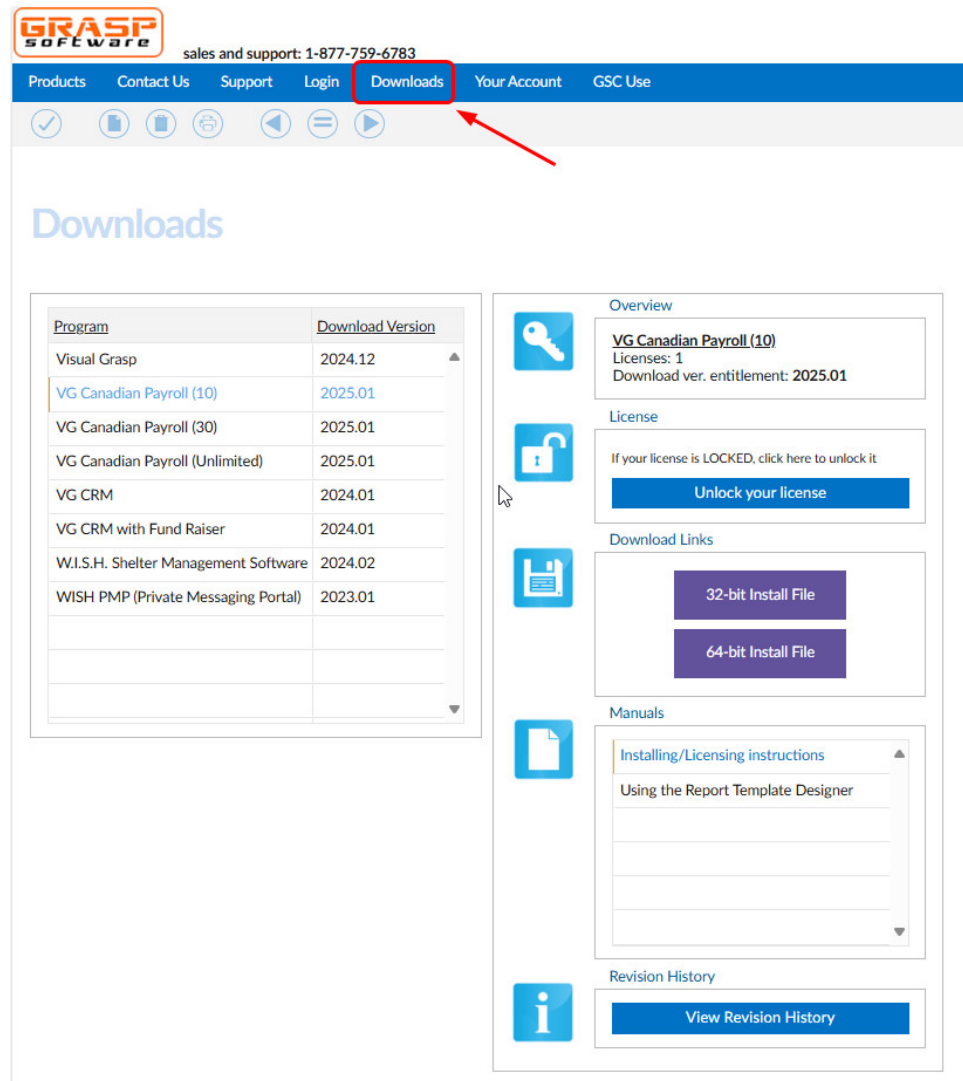
Once you have Logged in, click on the **Downloads** menu item at the top of the screen to display the products that are licensed for and able to download.
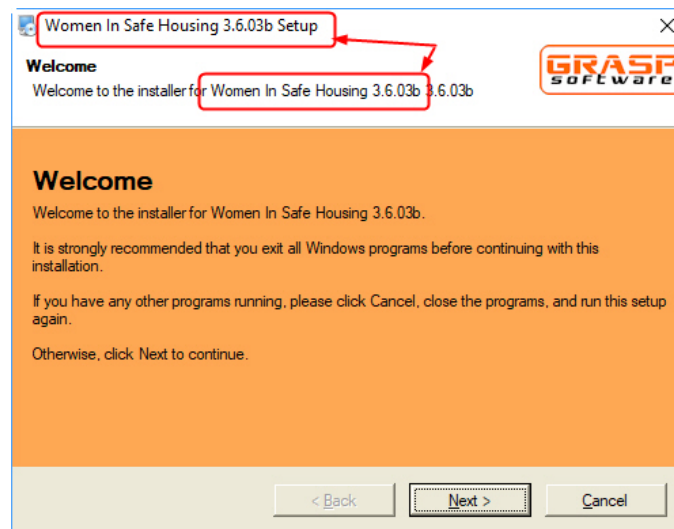

Once you select a product, the installation file can be downloaded by clicking on the purple button on the right side of the screen. The file will download to your computer and can be found in your "Downloads" folder.

INSTALLING THE PROGRAM

Once downloaded, simply run the installation file by double clicking on it and you are HIGHLY ADVISED to accept all of the defaults for the choices in the installation process. Only under very unlikely situations should you need (or want) to change the installation choices.

We won't cover the process here, but basically proceed through the Installation accepting ALL of the default choices.

The Program Installation screen will look slightly different for different products, but they all show the Product Name and Version Number in the screens, like this:

In addition, depending on your version of Windows and the security settings of your computer, you may be required to log in as a user with "administrative" rights and may also need to confirm that you do intend to install this program before the installation screen (shown above) appears.

If you are installing the program for the very first time, you will need to run this program on every workstation that is to have the program AND THE SERVER WHERE THE DATA WILL BE LOCATED.

If you have any questions, or any difficulties, you can contact our support team at 1-877-759-6783 or support@grasp.ca.

UPDATING AN EXISTING INSTALLATION

If you are updating the PROGRAM in an environment that has already been running the program, you will most likely simply need to run this PROGRAM INSTALLATION file on one computer. Most of our products are designed to

"push" the update out to other workstations when an updated version of the program has been installed to one of the workstations on the network.

<u>IMPORTANT</u>

When updating the W.I.S.H. (Women In Safe Housing) product ALWAYS be certain to run the update on the server where the data is located. The W.I.S.H. product often has a server side component that looks after the generation of statistics which means that it is imperative that the updated version of the program also be deployed to the file server.

PRODUCT LICENSING

When installing a Product for the first time or when upgrading a product to a newer major version (ie 3.2.xx to 3.3.xx), you will need to re-license your product. Also, if you are using a product that has been licensed as a "SaaS" (Software as a Service) product you will need to relicense the product when the license is about to expire.

Grasp Software products are licensed using one of two methods:

- License "Keys"   obsolete

- WSDL method. (pronounced "Wiz-Dil")

Prior to 2016, all products utilized the License Key method. Beginning with W.I.S.H. version 3.4.01 (released in January 2016), the WSDL method was added to introduce an easier method of product licensing. As of the writing of this document, the licensing methods of the products are shown in the table below:

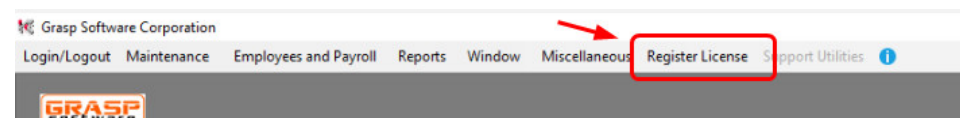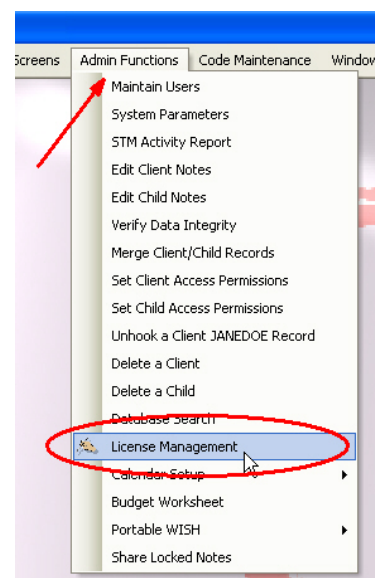| LICENSE KEY METHOD OBSOLETE	- VG-CRM3 and VG-CRM/FR3 prior to version 3.4 - Visual Grasp 3.x and 4.x, prior to version 4.5.02 - VG Canadian Payroll 2.x prior to version 2.5 - Case Journals 2.x prior to version 2.4 - W.I.S.H. 2.x, 3.0.x to 3.3.x
WSDL METHOD	- VG-CRM3 and VG-CRM/FR3 3.4.x and up - Visual Grasp Version 4.5.02 and up

	• VG Canadian Payroll 2.5.x and up
	• Case Journals 2.4.x and up
	• W.I.S.H. 3.4.x and up

This document will only address the WSDL Method of licensing

WSDL LICENSE SCREEN (WSDL Method)

The WSDL method of licensing was introduced to our products starting in January 2016 with W.I.S.H. 3.4.01. To license products that utilize this method, simply go to the License Screen within the product. An unlicensed product will open automatically to the License Screen for you.

On some programs, you will find the License Screen through the Admin Functions menu, while on some there will be a direct link at the top of the program screen:

The License Screen on a product that used the WSDL method will look very similar to this screen shown from W.I.S.H. 3.4.0.1.

You need to fill out ALL of the fields on this screen with valid entries including the Customer Code and Password that has been assigned to your company/organization from Grasp Software Corporation. Once that you have filled out his information, all of it (except the Password) will be retained for the next time that you may need to re-license the product (a version upgrade for example). Click on the **Register Now** button and your product will be registered.

A successfully licensed product will show your current license details in the upper left corner and will remember your previous entries in this field making future re-licensing a simple matter of entering your Password.

NOTE: If your license is a "SaaS" (Software as a Service) license the SaaS Expiry date will show in addition to the License details in the upper left corner.

NOTE: When licensing via the WSDL method, all Users should be logged entirely out of the program and the license should not be entered through the DEMO data, but through your LIVE data.

QUESTIONS?

If you have any questions or encounter any problems, you are encouraged to contact our support department at 1-877-759-6783 or support@grasp.ca

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CHANGES TO THIS WHITE PAPER

It is our goal to make this White Paper as "friendly" as possible even though detailing this complex and powerful feature of **W.I.S.H.™** . If you have any comments or suggestions that would make this White Paper even easier to read and understand, please let us know by emailing any comments to support@grasp.ca

THIS CONCLUDES THIS WHITE PAPER.