



Client Care Desktop

Setup for CCD Long-Term Licence



SYNAPTIC
CLIENT CARE

Introduction..... 3

Useful links 4

FileMaker Guides..... 4

CCD Workstation installers..... 4

FileMaker 15 Activity Table 5

Setup Configurations..... 6

 Local SOLO system – Installed on single workstation 6

 Local MULTI-USER system – Installation on local server and workstations 6

 Online MULTI-USER system – Installation on remote servers using RDP or CITRIX..... 7

 VPN setup – Remote server and local workstations 7

Server Components 8

 Re-Licencing FileMaker Server 15 (CCD version 5.10)..... 8

 Installing FileMaker Server (CCD versions 4.0 to 5.00)..... 9

Workstation Components 10

 Un-Installing Synaptic Software licenced versions of FileMaker Pro..... 10

 Installing your own FileMaker Pro 15 software 10

 CCD Databases 10

 Installing CCD Workstation..... 11

 FileMaker Plugins 12

Introduction

This document will explain the various Client Care Desktop (CCD) configurations you can have, where each component sits within those scenarios and the action you need to take in order to access the CCD long-term system utilising FileMaker 15.

All CCD long-term licence installations will require your own FileMaker Pro 15 and FileMaker Server 15 licences. FileMaker licences supplied by Synaptic Software will need to be uninstalled by 23:59 on the 31 December 2019.

The CCD system can be broken down into the following component parts;

- FileMaker
 - FileMaker Server
 - FileMaker Pro
 - FileMaker Plugins
- CCD Databases*
- CCD Workstation files

* CCD File Extensions

.CD4 – versions 4.0 to 4.3.3

.SCC14 – versions 4.50 to 5.10

We recommend that the tasks are performed by personnel who have a good understanding of your infrastructure, such as an internal or external IT department.

If you have any questions regarding this document, please contact our application support team on 0800 028 0033 (opt 1) before you start the process.

Prior to installing or uninstalling any software please ensure you have;

- Read this guide fully
- Determined the setup configuration relevant to your installation
- Read the [CCD Remote Desktop Access](#) document if using CCD via RDP or Citrix
- Have your installation media and licence details to hand

IMPORTANT NOTE:

FileMaker version 15 is required to run the CCD Long-Term licence. If a later FileMaker version is purchased, CCD will not operate correctly or in the expected way.

Support for FileMaker 15 runs to 20 September 2019, after which time this version is no longer supported by FileMaker and therefore considered to be out of date software.

It is expected that the CCD Long-Term licence will be used for reference only and a new CRM product will be used to support and run your business.

Useful links

<https://kb.synaptic.co.uk/help/how-to-locate-ccd-databases>
<https://kb.synaptic.co.uk/help/how-to-find-your-back-up-location>
<https://kb.synaptic.co.uk/help/remote-desktop-access>
<https://kb.synaptic.co.uk/help/data-extract-tool-v40-to-433>
<https://kb.synaptic.co.uk/help/setting-up-word-processing-and-email>

FileMaker Guides

https://fmhelp.filemaker.com/docs/15/en/fms15_getting_started.pdf
https://fmhelp.filemaker.com/docs/15/en/fmp15_install.pdf
https://fmhelp.filemaker.com/docs/14/en/fms14_getting_started.pdf
https://www.filemaker.com/support/product/docs/11/fms/fms11_getting_started_en.pdf
<https://community.filemaker.com/en/s/article/Installing-and-updating-plug-ins-in-FileMaker-Pro-1503692993983>

CCD Workstation installers

Please ensure you use the installer relevant to your version of CCD.

If using CCD versions 4.0 to 4.1 please use the CCD 4.20 Workstation installer.

CCD 4.20 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.20.0141.exe
CCD 4.30 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.30.0155.exe
CCD 4.31 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.31.0166.exe
CCD 4.32 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.32.1820.exe
CCD 4.33 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.33.1821.exe
CCD 4.50 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.50.0032.exe
CCD 5.00 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_5.00.0016.7.exe
CCD 5.10 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_5.10.0004.11.exe

FileMaker 15 Activity Table

Please use the following table to identify actions you need to take in order to use the CCD long-term option.

<i>Component /CCD Version</i>	5.10	4.50.x -> 5.00.x	4.0 -> 4.3.3
<i>FileMaker Server</i>	Re-Licence FileMaker Server 15	Uninstall and replace with your own licenced FileMaker Server 15	Uninstall and replace with your own licenced FileMaker Server 15
<i>FileMaker Pro</i>	Uninstall and replace with your own licenced FileMaker Pro 15	Uninstall and replace with your own licenced FileMaker Pro 15	Uninstall and replace with your own licenced FileMaker Pro 15
<i>CCD Databases</i>	No action	No action	Convert databases to FileMaker 15 compatible using Data Extract Tool
<i>CCD Workstation</i>	No action unless moving to new machine. Use Workstation installer	No action unless moving to new machine. Use Workstation installer	No action unless moving to new machine. Use Workstation installer

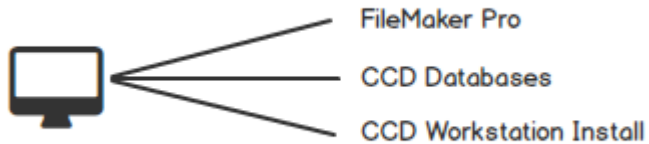
<https://kb.synaptic.co.uk/help/data-extract-tool-v40-to-433>

If you are using a version that is not mentioned in the table above, please contact the [customer service](#) team on 0800 028 0033 (opt 2) to discuss your options.

Setup Configurations

Local SOLO system – Installed on single workstation

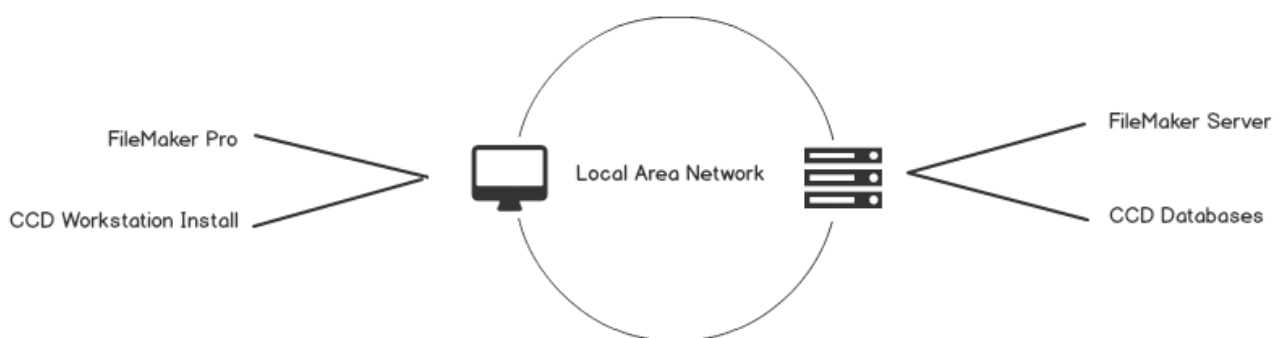
Both the Databases and Workstation files are installed on one machine in C:\Link.



- CCD Databases should be placed into C:\LINK
- CCD Shortcut path – C:\Link\Manager.SCC14 or C:\Link\Manager.CD4

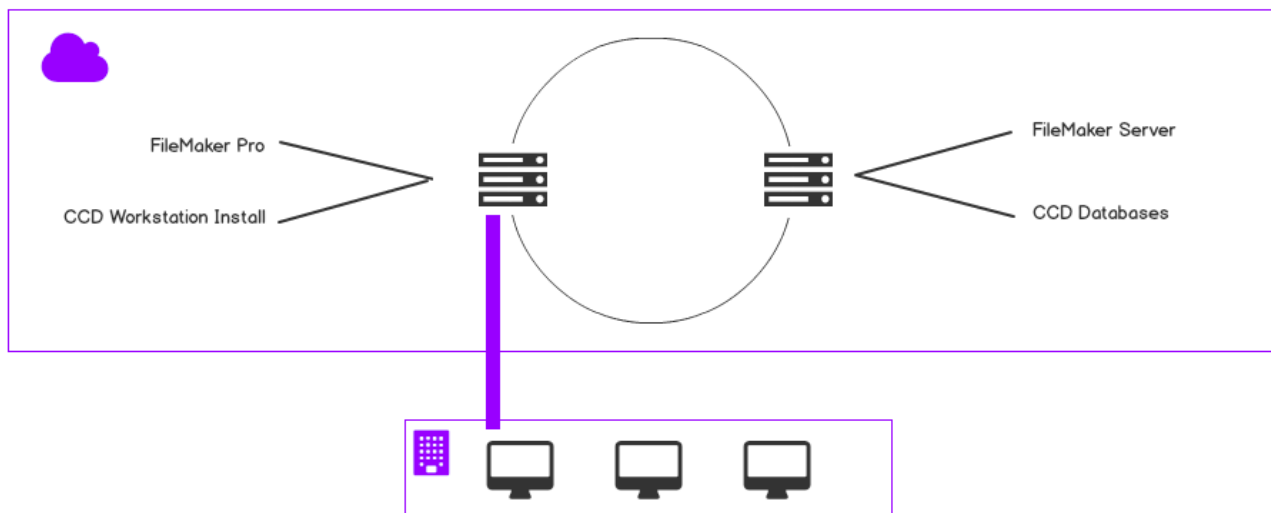
Local MULTI-USER system – Installation on local server and workstations

Databases located on a server and Workstation files are installed on local desktop PC's or laptops.



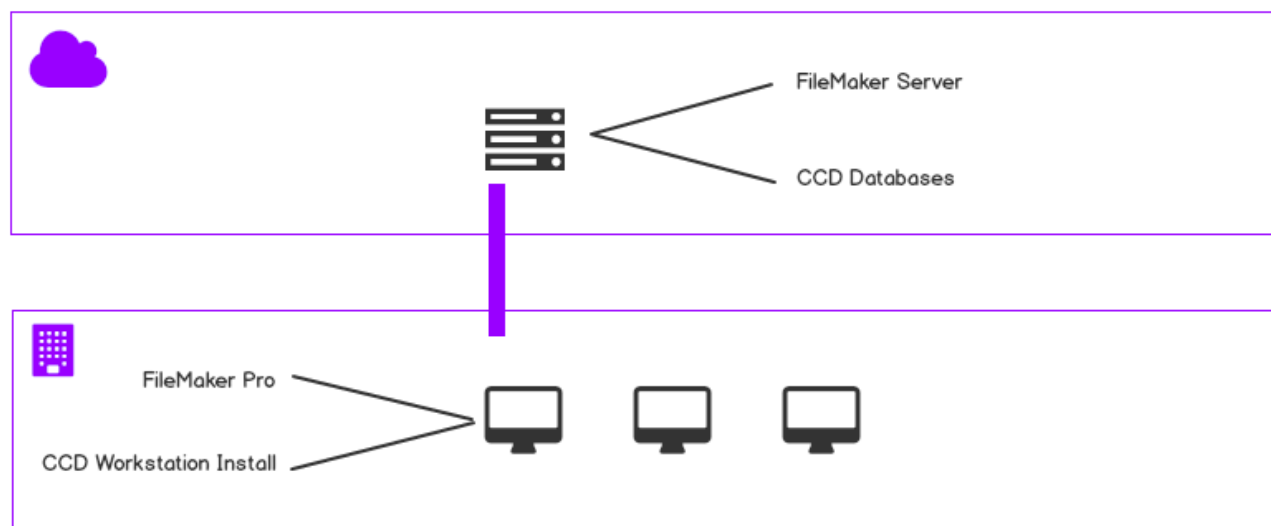
Online MULTI-USER system – Installation on remote servers using RDP or CITRIX

Databases located on a server and Workstation files installed to a separate RDP or CITRIX server.



VPN setup – Remote server and local workstations

Databases located on a remote cloud server and Workstation files are installed on local desktop PC's or laptops.



Server Components

Re-Licensing FileMaker Server 15 (CCD version 5.10)

Please login into your FileMaker Server Admin Console <http://localhost:16001>

Navigate to **General Settings > Server Information** and enter the details of your FileMaker Server 15 licence using the 'Change Licence Key' option.

The screenshot shows the FileMaker Server 15 Admin Console interface. The browser address bar displays 'localhost:16001/admin-console'. The left sidebar contains a navigation menu with the following items: Status, Activity, Schedules, Statistics, Log Viewer, General Settings (highlighted), and Database Server. The main content area is titled 'General Settings' with a help icon. It features a tabbed interface with the following tabs: Server Information (selected), Email Notifications, Admin Console, Startup, ODBC/JDBC, Administrator Groups, and Conn. The 'Server Information' tab contains the following sections:

- Server Name**: A text input field. Below it, a note states: 'FileMaker clients see this name when they use the Launch Center.'
- Server Description**: A text input field. Below it, a note states: 'Users view this description on the Admin Console Start page.'
- Administrator Contact Information**: A section with four input fields: Owner, Location, Email, and Phone Number. Below it, a note states: 'Users view this information on the Admin Console Start page.'
- License Information**: A section with the following text: 'To upgrade from a trial version of FileMaker Server, or to change the User Connections client limit, change the FileMaker Server license key.' Below this, it displays 'Product Name: FileMaker Server 15' and 'License Type: Shipping'.

A yellow button labeled 'Change License Key...' is located at the bottom right of the License Information section.

Installing FileMaker Server (CCD versions 4.0 to 5.00)

If you are running a configuration that requires an upgrade to FileMaker Server 15 please login to your existing FileMaker Server Admin Console and take note of the database locations and backup schedules in place.

Prior to installing FileMaker Server 15

1. Please ensure all users are logged out of CCD and use the Admin Console to close the CCD Database Files.
2. FileMaker Server runs as a Windows Service. Please stop these services.
3. Copy the CCD Databases (*.SCC14 or *.CD4) to a safe location on your server
4. Uninstall your previous FileMaker Server application using Add/Remove Programs

Please use the following guide to walk you through the basic install and setup of FileMaker 15 and where appropriate configure the Database locations and Backup Schedules.

https://fmhelp.filemaker.com/docs/15/en/fms15_getting_started.pdf

Once FileMaker Server 15 is installed

1. Ensure you have configured the Database Directory paths in FileMaker Server Admin Console
2. Ensure you have configured the backup schedules required
3. Ensure you have registered the correct file extensions for the Databases (*.SCC14 or *.CD4)
4. Ensure you have converted your databases using the Data Extract Tool (*.CD4 only)
5. Ensure you have copied your CCD Databases into the correct location
6. Ensure you have opened Inbound TCP Port 5003 on your server

Workstation Components

Un-Installing Synaptic Software licenced versions of FileMaker Pro

If you are currently using a Synaptic licenced version of FileMaker Pro on your workstations you will need to replace these with your own licenced copy of FileMaker Pro 15.

Please uninstall FileMaker Pro 9, 11, 14 or 15 via Add/Remove Programs.

Installing your own FileMaker Pro 15 software

Please install FileMaker Pro 15 using the steps in the following FileMaker guide

https://fmhelp.filemaker.com/docs/15/en/fmp15_install.pdf

If you are using CCD 4.50 or above with Microsoft Office 64-bit, please install the 64-bit version of FileMaker 15 otherwise install the 32-bit version. This will ensure compatibility with Microsoft Office.

For those updating a system prior to CCD 4.50 please use the 32-bit FileMaker installer to preserve plugin compatibility.

You do not need Bonjour installed on the workstations.

CCD Databases

CCD systems 4.0 to 4.3.3 will need to have their databases upgraded for use with FileMaker Pro 15. Please refer to the following guide;

<https://kb.synaptic.co.uk/help/data-extract-tool-v40-to-433>

If you are configuring a SOLO setup, please copy your CCD databases into **C:\Link**

Systems utilising FileMaker Server should refer to [Installing FileMaker Server](#) for the correct database location.

Installing CCD Workstation

The following links are the installers for the CCD Workstation files. These installers will default to C:\Link which should not be changed.

Please use the relevant installer for your version of CCD. If using CCD versions 4.0 to 4.1 please use the CCD 4.20 Workstation installer.

INSTALLERS

- CCD 4.20 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.20.0141.exe
- CCD 4.30 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.30.0155.exe
- CCD 4.31 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.31.0166.exe
- CCD 4.32 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.32.1820.exe
- CCD 4.33 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.33.1821.exe
- CCD 4.50 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_4.50.0032.exe
- CCD 5.00 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_5.00.0016.7.exe
- CCD 5.10 - https://update.synaptic.co.uk/downloads/ssl_ccd_wkst_5.10.0004.11.exe

SHORTCUT UPDATE

1. If you are using FileMaker Server please navigate to C:\Link\SHG.
2. Right-click 'CCDS shortcutGenerator.exe' and run as Administrator
3. Select the server hosting your CCD files or enter the IP address
4. Select OK

This will update your CCD shortcuts to point to the correct location.

The shortcut for **SOLO** systems should point to **C:\Link\Manager.CD4** or **C:\Link\Manager.SCC14**

Please update target path accordingly.

WORD and EMAIL

Please refer to the following guide to ensure you have set your Word integration paths correctly.

<https://kb.synaptic.co.uk/help/setting-up-word-processing-and-email>

FileMaker Plugins

FileMaker plugins allow developers to add additional functionality to the base features of FileMaker Pro. Over the years CCD has made use of various plugins and they are installed separately for each FileMaker instance.

These plugins will be installed automatically with the Workstation installer but we will need to move a text file from it's installed location to it's FileMaker 15 compatible location.

Please move the **TroiPay.txt** file as per the grid below;

Installer Version	Old Location	New Location
4.2 -> 4.3.x	C:\Program Files (x86)\FileMaker\FileMaker Pro 11	C:\Program Files (x86)\FileMaker\FileMaker Pro 15
4.50 -> 5.00	n/a	n/a
5.10	n/a	n/a

For more information on FileMaker Plugin locations please reference;

<https://community.filemaker.com/en/s/article/Installing-and-updating-plug-ins-in-FileMaker-Pro-1503692993983>



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