

Adding and Updating the CA Products License Keys

Before adding the CA license keys, you must first Publish the CA Product(s) Customization(s) **and** the License Key Publication at the same time. You only need to upload and publish the License Key Customization package with your first CA Product install. For instructions on how to publish the files, please refer to the product user guide or follow the example installation instructions [Publishing CA Products](#) on pages 3-8 of this document. Once you have Published your CA Product, you will need to install your License Key(s) to use your CA Product add-on in your Production or Active Tenant Environment.

- Customizations may be installed to a “Test” Tenant without a valid License Key entered; however, the CA License Customization must still be published in order to publish a CA Product. Please refer to Section [To Convert a Tenant to the Test Tenant](#) on page 2 of this document.

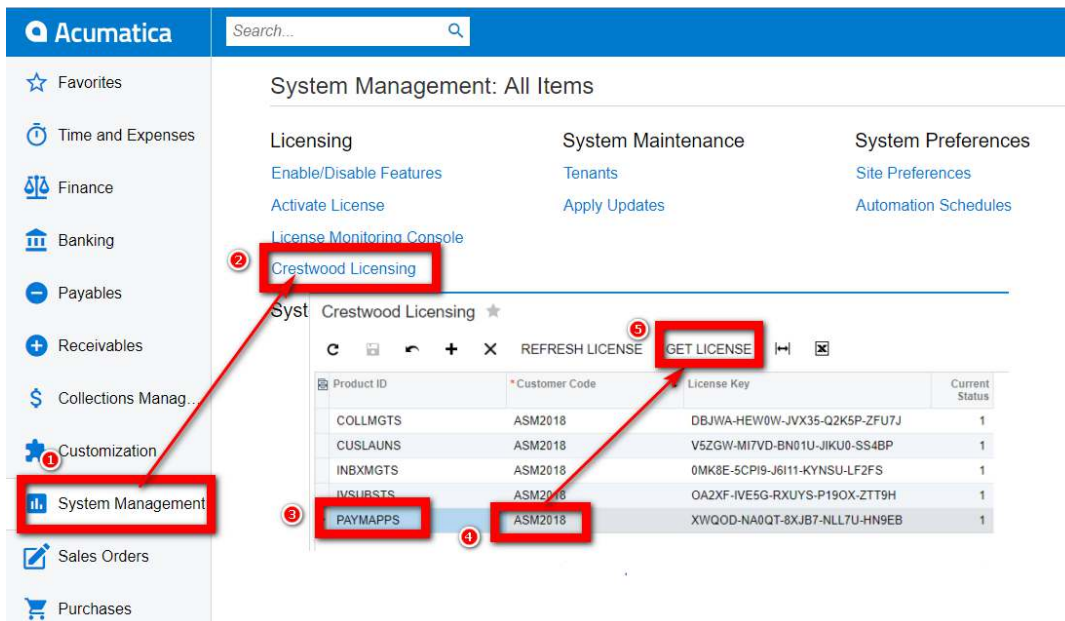


A test tenant cannot be converted back to an active tenant-please do not convert a production tenant from active to test

Activating your License Keys

To activate the CA Product License Key(s), obtain your Product ID(s) and Customer ID from your partner and enter both on the Crestwood Licensing Form (CW.CL.1000) with the following steps:

1. Select: **System Management** Workspace
2. Select **Crestwood Licensing** Menu Item: FORM ID: (CW.CL.1000)
3. Enter the **Product ID** (provided by your Acumatica Partner)
4. Enter the **Customer Code** (provided by your Acumatica Partner)
5. Press **GET LICENSE** button and a License Key will be populated automatically in the LicenseKey Field and the Current Status will = “1”. You will also receive a popup note presenting your current license Expiration Date. If you receive an error, please contact your Acumatica Partner to receive an updated Key.



The screenshot shows the Acumatica interface with the following elements highlighted:

- System Management** in the left sidebar (circled 1).
- Crestwood Licensing** in the main menu (circled 2).
- GET LICENSE** button in the top right of the form (circled 5).
- PAYMAPPS** and **ASM2018** in the Product ID field (circled 3 and 4).

Product ID	*Customer Code	License Key	Current Status
COLLMGTS	ASM2018	DBJWA-HEW0W-JVX35-Q2K5P-ZFU7J	1
CUSLAUNS	ASM2018	V5ZGW-MI7VD-BN01U-JIKU0-SS4BP	1
INBXMGTS	ASM2018	0MK8E-5CPI9-J6I11-KYNSU-LF2FS	1
IVSUBSTS	ASM2018	OA2XF-IVE5G-RXUY5-P19OX-ZTT9H	1
PAYMAPPS	ASM2018	XWQOD-NA0QT-8XJB7-NLL7U-HN9EB	1

At any time, you can press **REFRESH LICENSE** to retrieve your current license key and/or obtain your current expiration date for the highlighted product.

To Convert a Tenant to the Test Tenant

You can use test tenants to train your staff or test the results of irreversible operations before performing such operations on your production tenant. You can have a virtually unlimited number of test tenants in your instance. For more information, see [Managing Tenants](#) and [Configuration of the Test Environment](#).

To convert a tenant to a test tenant, you use the [Tenants \(SM203520\)](#) form.



A test tenant cannot be converted back to an active tenant.

To Change the Status of a Tenant

1. On the **System** tab, click **Management**. In the left pane, navigate to **Manage > Tenants**.
2. In the **Tenant ID** box, select the tenant you want to use as the test tenant.
3. On the form toolbar, click **Change to Test Tenant**.

The tenant is converted to the test tenant. The status of the tenant is changed to *Test Tenant*.

Publishing CA Products

Installing and Publishing a CA Product Customization and the CA License Customization

This is an example of Installing the Collections Management for Acumatica and the CA License Customization and Keys; however, you would follow similar steps for all CA Products

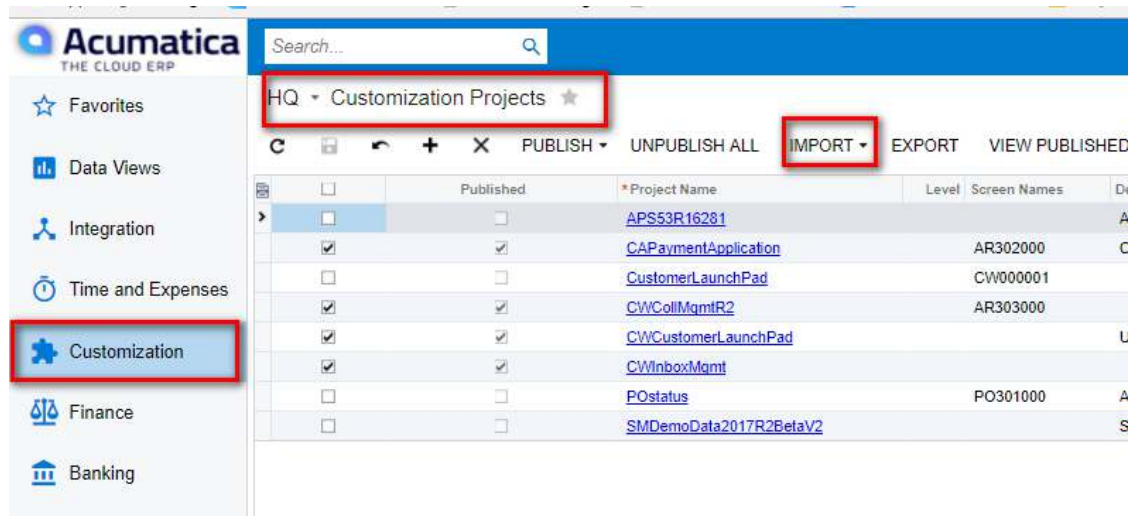
Installation of the Collections Management for Acumatica is performed using the Acumatica Customization manager.

Collections Management Installation

To deploy customizations, the user must be a member of the "Customizer" role. Crestwood recommends installation using the default "Admin" user however any user who is a member of this role will be sufficient. To provide "Customizer" role access to a user, please refer to the **Managing User Access Rights** in the **Acumatica Help Articles**.

Import Customization Projects

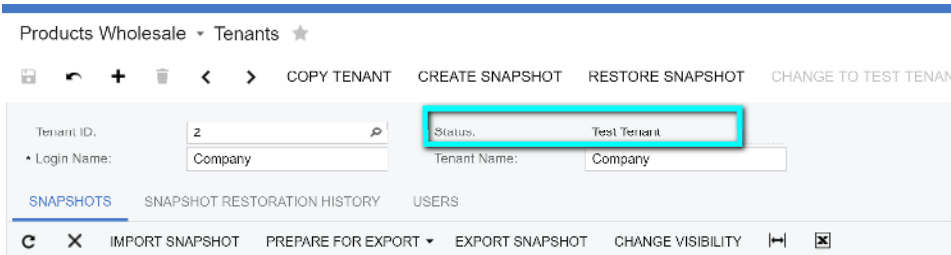
All customizations in the Acumatica instance are maintained in the "Customization Projects" screen of Acumatica. This screen is accessed from the following navigation Location: "Customization" -> "Customization Projects"



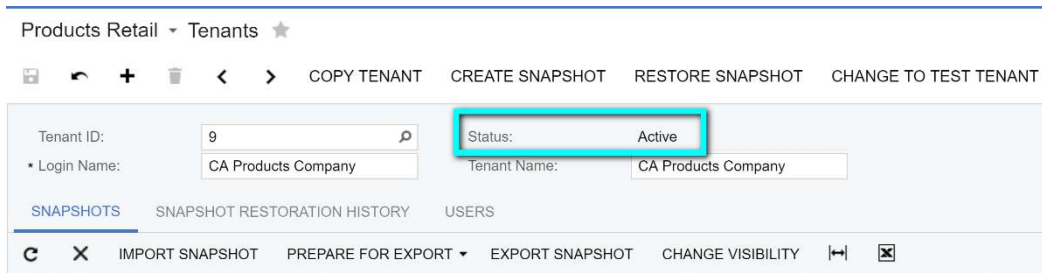
To perform a new installation of the Collections Management (or any CA Product) for Acumatica to the Acumatica instance, the current versions of the customization project zip files, including **CWCollMgmt** and **CWCrestwoodLicensing**, must be imported into the Acumatica Instance. When the file(s) are uploaded, two new customization projects will be created based on the name of the file(s) uploaded.

- Both files should be published at the same time.
- If you would like to try Collections Management (or any CA Product) for Acumatica prior to purchasing, the process to install is the same (including importing and publishing of the Collections & Licensing Customization files) except they must be imported and published to a "Test" Tenant or the functionality will not be available to use.
- If the Files are imported and published to an "Active" Tenant, you must purchase license keys in order to use the product.
- The module will not install or validate unless the CWCrestwoodLicensing Package is published with the Module.

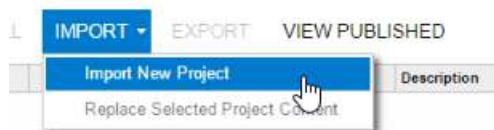
To try Collections Management (or any CA Product)– Tenant Status must equal "Test Tenant." By installing in a Test Tenant, you can try all features of the product. Once installed in an Active Tenant, an active registration/license key is required



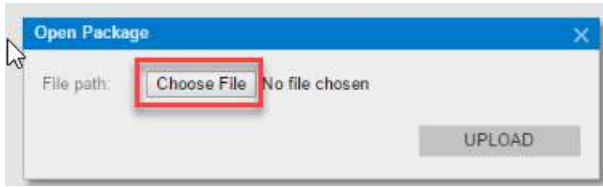
To Install Collections Management in a **Production Environment** or **Active Status Tenant**, an active registration/license key is required to be entered in the Crestwood Licensing Screen.



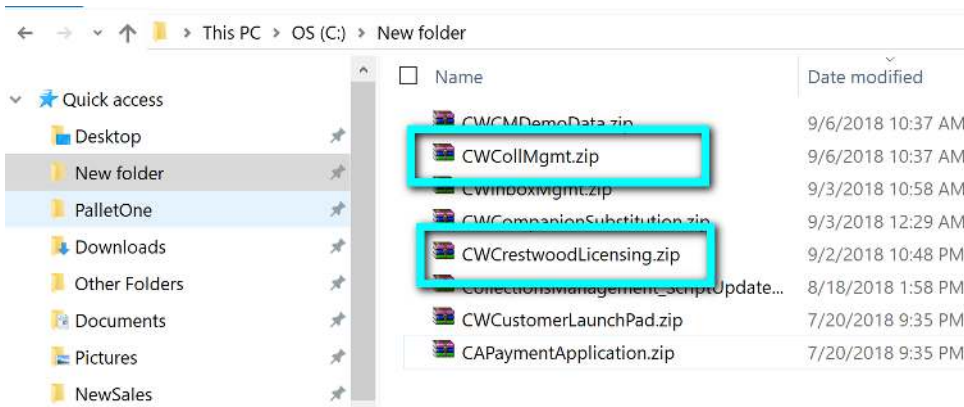
1. Access the **Customization Projects** Screen
2. Click **Import** button (NOTE: If the dropdown is selected on the right side of the button, two options will show. Select the **Import New Project** option.



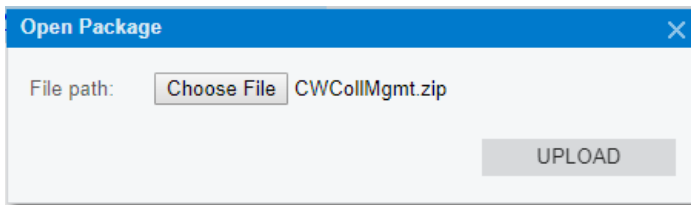
3. In the **Open Package** dialogue box that appears, click the **Choose File** button




4. In the File browser, navigate to the location where the Customization zip file exists. Select the file and click the “Open” button. Go through Steps 2-4 again to import the CW Crestwood Licensing.zip file. Both the module and license customization projects must be imported and published at the same time.



5. You will be redirected back to the **Open Package** dialogue box and the zip file name should show next to the **Choose File** button. Click the **Upload** button. Once the upload is complete, the Customization Project(s) will show in the **Customizations Project** Screen.



 : The amount of time it takes to upload the customization project(s) will depend on the size of the file and the internet speed

Customization Upgrade

To update to the latest supplied version of the Collections Management for Acumatica, the following steps need to be performed:

1. Access the **Customization Projects** Screen
2. Select the Collections Management Project (and updated Crestwood Licensing Project if provided)

Products Wholesale ▾ Customization Projects ★

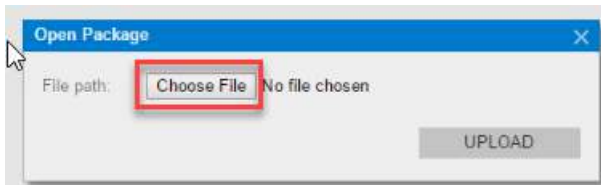
PUBLISH ▾
 UNPUBLISH ALL
 IMPORT ▾
 EXPORT
 VIEW PUBLI

<input type="checkbox"/>	Published	*Project Name	Level	Screen Names
<input type="checkbox"/>	<input type="checkbox"/>	CWCMDemoData		CWCM1000
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCollMgmt		AR303000,SM2040
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCompanionSubstitution		IN202500,SO30100
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCustomerLaunchPad		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWInboxMgmt		SM204002
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWPaymentApplication		AR302000
<input type="checkbox"/>	<input type="checkbox"/>	POstatus		PO301000
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCrestwoodLicensing	1	

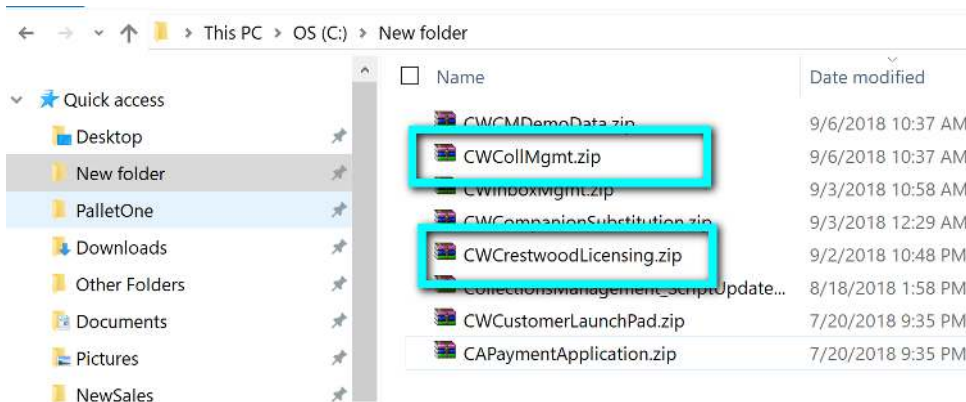
3. Select the dropdown next to the **Import** button and select **Replace Selected Project Content**. This step should be done for both the updated module and licensing customization project if applicable.



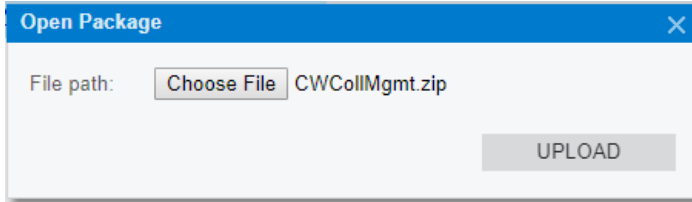
4. In the **Open Package** dialogue box that appears, click the **Choose File** button



5. In the File browser, navigate to the location where the Customization zip file(s) exists. Select the Collections Management.zip file (and subsequently the Crestwood Licensing Project if applicable) and click the "Open" button



- You will be redirected back to the **Open Package** dialogue box and the zip file name should show next to the **Choose File** button. Click the **Upload** button. Once the upload is complete, the Customization Project will show in the **Customizations Project Screen**.



Customization Publishing

To utilize a customization that has been uploaded, it must be published to the Acumatica instance. If you are updating an existing installation, the site must be republished. It is important to note the following items during the publishing step:



: Customizations affect all companies in an Acumatica instance, not just the current company you are logged into

After the publishing step is performed, the Acumatica Instance will restart effectively logging off all users currently in the system. There is no confirmation prompt for the users to save work. Customizations should only be published during a scheduled maintenance window or when validated that no one is currently logged into Acumatica.

To publish the Acumatica customization project

- Validate that the project is selected in the customization projects window

Products Wholesale - Customization Projects ★

PUBLISH ▾
UNPUBLISH ALL
IMPORT ▾
EXPORT
VIEW PUBLIC

<input type="checkbox"/>	<input type="checkbox"/>	Published	*Project Name	Level	Screen Names
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CWCMDemoData		CWCM1000
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCollMgmt		AR303000,SM204000
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCompanionSubstitution		IN202500,SO301000
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCustomerLaunchPad		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWInboxMgmt		SM204002
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWPaymentApplication		AR302000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	POstatus		PO301000
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCrestwoodLicensing	1	

2. Click the **Publish** button to begin the publishing validation.

PUBLISH ▾ |

3. Once you click the Publish button, Acumatica will validate that all customizations compile correctly. If this step is performed successfully, you will be prompted with the “Publish” option in the Compilation Window. Click the **publish** button

```
Compilation
Validating the website C:\Program Files (x86)\Acumatica ERP\Custom1
IIS APPPOOL\AcumaticaDBLocal
Building directory '\WebSiteValidationDomain\App_Code\'
Building directory '\WebSiteValidationDomain\App_RuntimeCode\'
Building directory '\WebSiteValidationDomain\Controls\'
Building directory '\WebSiteValidationDomain\CstPublished\pages_ar\'
Building directory '\WebSiteValidationDomain\MasterPages\'
Building directory '\WebSiteValidationDomain\Customization\'
Building directory '\WebSiteValidationDomain\ExternalResource\'
Building directory '\WebSiteValidationDomain\Mobile\'
Building directory '\WebSiteValidationDomain\Pages\Ck\'
Building directory '\WebSiteValidationDomain\Pivot\'
Building directory '\WebSiteValidationDomain\'
Compiler time, in seconds: 34.4548657

Validation finished successfully.

Publish Warning. Active website users will be logged out.
```

Website updated.

4. After publishing is complete, you will see the message that the **Website updated**, and the window can be closed at this point.



: Depending on the Acumatica Version and Setup, you may not be required to Press the **Publish** button after Acumatica Validates the Customization Package. Acumatica may complete both steps for you at the same time.

5. Installation of the Collections Management for Acumatica is now complete.
6. If you need further assistance, please contact your Partner or Crestwood Associates.