

6-in-1 Estate Administration Software FileMaker Platform – Windows Server 2022 – Server Version: 21.1.1.40 | 2025-050 | Launcher v2.2.0.1 Revised 2/22/2025

# HOW TO: Update 6-in-1 Server Edition for Windows Server

The following offers step-by-step instructions for updating 6-in-1 Server Edition running on Windows Server 2016/2019/2022.

#### WARNINGS:

- This is for Multi-user / Server installations only. Standalone edition instructions are available <u>here</u>.
- You may need local Administrative privileges in order to complete this process.
- You should close all programs and save your work prior to proceeding.
- All 6-in-1 users should be logged out of the system. Otherwise, the process will disconnect them safely.
- In some cases, especially with older machines and operating systems, you may be forced to restart your computer without warning.

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### 1) INTRO Part 1: Overview

Every year we release updates to 6-in-1 to support the latest tax forms, changes in tax law, and product enhancements. This article includes step-by-step instructions to install these updates for Server Edition users running a pre-FileMaker 20 version of our product on Windows Server 2016, 2019, or 2022. Screen shots for these instructions are based on Windows Server 2019 but can be easily adapted for users running Server 2016, 2022 or 2025.

6-in-1 Server Edition consists of four primary components:

- 1. <u>FileMaker Server (FMS)</u>: This is the "engine" that hosts the 6-in-1 data files for access over the local area network. Updating this component is recommended and is touched on in Step 4.
- 2. <u>FileMaker Pro 20 (FMP)</u>: This is the "client" that talks to FMS. It is installed on the server for maintenance purposes, and on the workstation of any user who needs access to 6-in-1. Its installer includes Lackner Connect, some plug-ins, and other support files that help 6-in-1 operate.
- 3. <u>Lackner Connect</u>: New for most users in 2025, this is a utility that manages your 6-in-1 database files (below). Most importantly to you, it introduces an auto-update mechanism to make keeping your 6-in-1 up to date easier than ever.
- 4. <u>6-in-1 Database Files</u>: These files hold your client data as well as all of 6-in-1's tax, accounting, and forms logic. They are the main component that needs to be updated annually, and sometimes several times within the course of a year.



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This document assumes that you have already installed FileMaker 19 or later in your environment and are simply looking to update. In our step-by-step example, we'll be updating from an earlier version of 6-in-1 running on FileMaker 19.4.2 to 6-in-1 v2025-050 (February 19, 2025) running on FileMaker 20.3.2 (FMP) / 21.1.1 (FMS). You might, however, be updating from an even earlier version.

Please note that the version numbers between FMS and FMP do not always align. Currently, we use FileMaker Pro 20 (2023) v20.3.2 for all of our Windows users, whereas we install FileMaker Sever 21 (2024) v21.1.1 for the server component.

### 2) INTRO Part 2: NEW in 2025

There are now three aspects to a 6-in-1 update on the server machine:

- 1. FileMaker Server: The database hosting engine is at the core of a server installation. (Directions for this are outlined later in this document).
- FileMaker Pro: This updates you to FileMaker Pro 20 and includes the new Lackner Connect installation utility. (Directions for this are outlined later in this document).

Password: showtime

**3. 6-in-1 Updates**: Simply launch 6-in-1 from the server machine, and Lackner Connect will guide you through a short procedure to perform the update to 2025-050.



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Frequently Asked Questions:

- Q: What is Lackner Connect?
- **A**: Lackner Connect is a new utility that helps manage your Lackner Software installations for both our 6-in-1 and InheriTax products and facilitates automatic updates.

#### Q: How can I tell if I have Lackner Connect?

*A*: You can tell you have Lackner Connect installed if... your Windows installation has a desktop icon that looks like the icon displayed below on the left, and/or... when you launch 6-in-1, you see a window that looks like the screen shot below on the right:



This new installation method using Lackner Connect is designed for customers to engage in as much "self-help" as possible without the need to coordinate technical support (with us *or* your IT personnel). Directions for how this works are short and sweet and can be found in Step 9 at the end of this document. If you don't yet have Lackner Connect installed, continue reading from here for documentation that will walk you through that process.

#### Q: How can I tell if I have the older installation/version?

*A*: You can tell if you have an older installation if you don't see the examples of Lackner Connect above, and your desktop icons look like any of these below:





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### 3) INTRO Part 3: System Requirements

If you have successfully installed FileMaker 19 Server (or later) on this machine, then we can assume that your machine will be adequate and will allow installation of the 6-in-1 update. The server component (FMS), however, is particular with regard to versions of Windows Server. Because of planned future enhancements, we want our customers to be on FileMaker Server 21 if at all possible. That said, it does not install reliably on Windows Server 2016 or earlier. Here's what we recommend by server version:

- Windows Server 19 or later: FileMaker Server 21
- Windows Server 16: FileMaker Server 20, for now.
- Versions of Windows Server prior to 16 are technically not supported. That said, we've seen some customers successfully install FMS 20.
- Non-Server versions (Windows 10 or 11): These are not technically supported either, although we have seen some customers make them work.

If you are running an OS earlier than Windows Server 2019, <u>please plan on updating</u> your OS to accommodate the newer version during this calendar year so that we can be sure you'll be ready for some great enhancements that we have planned.

If you need more information about the technical specifications of FileMaker, please refer to Claris' documentation:

**Claris FileMaker Technical Specifications** 

#### 4) PREP: Update to FileMaker Server 21 (v20, minimum is required)

Again, we strongly recommend upgrading to the latest release of FileMaker Server 21 when possible because:

- We are planning new features that require it.
- There are many security and performance enhancements that make it worthwhile.



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The following guide will help you update your FMS:

HOW TO: Update FileMaker Server from v19 or v20 to v21 on Windows Server

There are 2 ways to quickly determine the version of FMS you are running. The first is illustrated below and uses the FMS Admin Console. The second is demonstrated in Step 5 below, which also displays the *Local* FMP version.

a. Log into the admin console by opening your browser and navigating to http://localhost:16001. The default credentials (see screenshot below) are unchanged from the original installation unless they were changed by you or one of your colleagues.



b. Upon login, you will be presented with a dashboard. Note the FMS version at the bottom left.

- O localitose reconvacinini-console/app/da	ishboard	0 A* 1
Claris FileMaker Server	Tues	day, January 31, 2023 at 10:20 Streets
Dashboard Databases Backups	Configuration Connectors Administration	
System Overview		
0 123 / 123		
Total Connections Hosted Databases		
FileMaker Pro 0 Connections () FileMaker Go 0	Connections FileMaker WebDirect 0 Connections Additiona	0 Connections (?)
Server Name	FileMaker Server License Expiration	FileMaker Data API Annual Limit
FMS19-01	06/21/2023, 15:59	0 KB / 24000 GB
	SSL Certificate	ODBC and JDBC Connections
Server IP Addresses	Expires on 2050-02-07 00:39:44 UTC Details	0 / Unrestricted
Server IP Addresses 10.211.55.128 fdb2:2c26:f4e4:0:a7aa:db51:2cf3:d71b		
Server IP-Addresses 10.211.55.128 fdb2:2c26:f4e4:0:a7aa:db51:2cf3:d71b Server Version	Last Backup	FileMaker Script Engine Connection



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# 5) **PREP:** Plan to update FileMaker Pro with Lackner Connect on all client workstations AFTER updating the server

As mentioned in the overview above, this guide focuses only on updating the components on your SERVER. While it is absolutely recommended to keep the desktop client installations in step with the rest of the system, it is optional. The following guide outlines the process to run on each of the desktops ("client" workstations):

# HOW TO: Update FileMaker Pro for 6-in-1 to the latest version (including Lackner Connect) on Windows

You can determine what version FMP is running on a local desktop by launching 6-in-1 and Clicking on the version text in the opening screen. See screen shot:



Note that you can also determine the FMS version from that same dialog.



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### 6) PREP: Make note of your Customer ID

**NOTE:** You will likely need your Customer ID when you launch Lackner Connect. Also, if you have not updated 6-in-1 recently, it may be needed again inside 6-in-1 at the end of this process. Your Customer ID is a seven-character code (4 alpha, 3 numeric) and is available on your invoice or right inside 6-in-1.

Inside 6-in-1, you can capture your Customer ID from the very first 6-in-1 Menu screen or in the bottom right corner of the second 6-in-1 Menu screen.



#### 7) PREP: Make sure the FileMaker Server service is RUNNING

UNLIKE prior update routines where you were instructed to STOP the FileMaker Server SERVICE before running updates, Lackner Connect REQUIRES that the service be running. Please take a moment to make sure that the service is RUNNING.

0								
Recycle Bin	Gervices File Action View	Help				-		×
Claris FileMaker S	Services (Local)	Services (Local) FileMaker Server	Name	Description Manages Fil	Status Running	Startup Type Automatic	Log On As Local Syste	^
Lackner Software	Restart the service Description: Manages FileMaker Server components.	Function Discovery Resourc     Geolocation Service     GraphicsPerfSvc     Group Policy Client     Human Interface Device Service	Publishes th This service Graphics pe The service i	Running	Manual (Trig Disabled Disabled Automatic (T	Local Service Local Syste Local Syste Local Syste Local Syste		
		Extended Standard	Hyper-V Data Exchange Set     Hyper-V Guest Service Inter     Hyper-V Guest Southerum S	is R	UNN	ING.	ical Syste ical Syste ical Syste	~



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#### 8) PREP: Make sure your firewall has the right ports open

THIS IS VERY IMPORTANT! Please make sure that your firewall allows traffic in from these ports:

- 5003: Primary communication between FMP and FMS
- 5004: Backup for 5003
- 443: For HTTPS communication between Lackner Connect and the server.
- 4443 and 8443: Alternatives to 443 if you have conflicts in IIS. Any other custom port can be configured, but 443, 4443, and 8443 are the ports Lackner Connect will look for by default without specifying in server settings within Lackner Connect's Settings.





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#### 9) Download the latest installation package for FileMaker Pro

Before you start, let's make sure you're working from the latest version of FileMaker Pro available on our <u>downloads page</u>:



#### 10) Run the installer "as administrator"

**NOTE:** Please close 6-in-1 and FileMaker Pro before proceeding.

- a. Locate the downloaded installer.
- b. Right-click on the installer and select Run as administrator.





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c. If prompted by UAC (User Account Control), please choose Yes to allow changes to your device.



### 11) Step through the installation wizard

a. When the installer loads the welcome screen, click Next.

FileMaker Pro 20 (2023) for Lackner Software	×
	Welcome to the installation and update utility for
	FileMaker Pro 20 for Lackner Software
	Version:
	20.3.2.201
	Description:
	This utility installs or updates FileMaker Pro and all utilities and components required for Lackner Software, including 6-in-1, InheriTax and DecoupleCruncher.
	Support:
	Having trouble? We're here to help! Kindly submit a ticket clicking <u>here</u> , or visit us at <u>support.lacknergroup.com</u> .
	Press Next to install or Cancel to exit.
	Next > Sancel

b. You will next be prompted for a password. Please enter the password showtime and then press Next.

laker Pro 20 (2023) for Lackner Software	×
Password Protection	
The package is password protected. Please provide the correct password to continue or press Cancel to exit.	
Please enter the password into the following field to continue:	
showtime	
· · · · · · · · · · · · · · · · · · ·	
1	
	texer Pro 22 (022) for Lackner Software  Password Protection  The package is password protected. Please provide the correct password to continue or press Cancel to exit.  Please enter the password into the following field to continue  showtime



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c. Next, the installer will automatically select what it recommends. If you already have an earlier version of FileMaker 20, it will pre-select an UPDATE button rather than the INSTALL button seen in the screen shot below.

On server, you do NOT need pdfFactory Pro.

To continue, press Next.

Select compo	ients to install	
Please select the compor	ents you would like to be installed onto your con	mputer:
the dealer of the second of the dealer	the second second at the test second state	
Component	Description	
Lackner Components	Launch and configuration utilities for FileMaker	
FileMaker Pro 20	Install FileMaker Pro 20.3.2.201	
pdfFactory Pro	[Already Installed] pdfFactory Pro 3.5.2 Desktop	

d. You will then be asked if you would like to verify the installation location. We recommend that you keep the default setting, then press Next.





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e. From here, the installation will proceed. You'll see a progress bar followed by an indication that FileMaker is installing. When prompted, press OK to continue the installation.

🐉 FileMaker Pro 20 (2023) for Laciner Software X	
Unpacking Files	
Please wait while the package files are being extracted onto your computer	
Extracting Installers/FileMaker Pro/Installer/Files/DotNet/Indp48-web.exe	
	FileMai FileMaker Pro 20 X
	FileMaker Pro 20 Setup completed successfully.
Institution 301.01 U.S. D	Тіте п
	FileMaker Pro 20
	Please wait while Windows configures FileMaker Pro 20
FileMaker is installing	Gathering required information Cancel

f. Next, you'll see fonts installing, followed by a confirmation that configuration has taken place. Press OK to continue.





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g. Next, you'll be asked if you want to restart the server. This is because of the font installation. We suggest you choose Restart Later, then press Next to continue.



h. Finally, please choose to Launch Lackner Software and Close the installer

PileMaker Pro 20 (2023) for Lackner Software		×
	Success!	
	The installation process is complete. Launch 'Lackner Software' to use the software and/or continue setup and configuration.	
	Press <b>Close</b> to exit.	
<b>→</b>	☐ Launch Lackner Software now?	

i. When the update completes, press Finish. This will launch FileMaker & Lackner Connect.

**NOTE**: When the option Launch Lackner Software now? is checked (as the default), Lackner Connect (and eventually 6-in-1) will be launched immediately upon closing the installer. If you wish to initiate that process later, you can UNcheck the option and press Close. The sequence described in the next step will automatically initiate the next time it is launched.



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### 12) Launch FileMaker and Lackner Connect

If you're continuing from the last step, FileMaker Pro will be opened by the installer, and Lackner Connect will automatically load. You can skip to Step 12b.

a. If you're picking up at this step, launch Lackner Connect by double-clicking on the Lackner Software icon on your desktop.



b. You'll see our progress bar.



c. You may be prompted by the Windows Defender Firewall the first time FileMaker 20 is launching. If so, please choose Allow Access.

Windows Sect	urity Alert		×
Windo app	ows Defenc	ler Firewall has blocked some features of this	
Windows Defender networks.	Firewall has bl	ocked some features of FileMaker Pro on all public and private	
57	Name:	FileMaker Pro	
P	Publisher:	Claris International Inc.	
	Pat <u>h</u> :	C:\program files\filemaker\filemaker pro 20\filemaker pro.exe	
Allow FileMaker Pro	to communicat	e on these networks:	
Private netw	vorks, such as r	ny home or work network	
Public netwo because the	orks, such as th se networks of	ose in airports and coffee shops (not recommended ten have little or no security)	
What are the risks	of allowing an a	app through a firewall?	
		Cancel	



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d. Next, Lackner Connect will load. In the likely event that another version of Lackner Connect has been released since the installer was published, it will go through a short self-update sequence.



- e. In most cases for THIS update, we recommend starting fresh and configuring Lackner Connect anew. Depending on how 6-in-1 was configured in the past, one of these three scenarios will present itself:
  - 1. You see the Lackner Connect Welcome Screen and a big button Click to begin setup:



If this is the case, please go to Step 14 to continue.



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2. You'll see a variation of an error like this because a prior configuration is not working:



Following that message, you'll be brought to the Lackner Connect home screen.



Please continue to Step 13 to reset Lackner Connect.

3. 6-in-1 will automatically launch:



If this is the case and you are sure that 6-in-1 correctly configured, up to date, and ready to go, you may well be done! That said, if this is the first



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time you've run Lackner Connect, it is likely that you are not running an SSL cert (as indicated by the red un-locked icon 
in the top right corner). For this reason, we recommend that you reset the configuration. To do so, go to the Window/Show Window menu and select Lackner Connect to reveal it and bring it to the front. Then, go to Step 13.

ols	Window Help			
U	<u>N</u> ew Window			
	Show Window		1 License (FMS19-01)	_1
	Hide Window		2 Lackner Connect, v1.1.0.22	
_	Minimize Window		3 (UGen)	
-	<u>T</u> ile Horizontally Tile <u>V</u> ertically <u>C</u> ascade Windows <u>B</u> ring All to Front	Shift+F4 Shift+F5	4 (Transact) <u>5</u> (TAX_LKUP)	
Date )8/(	✓ 1 MODULES (FMS19-0 2 Opener (FMS19-01)	11)		

### 13) Conditionally, Reset Lackner Connect

From the Utilities\Lackner Connect menu, choose Reset Lackner Connect... then continue to Step 14.





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- 14) Configure the server using the Setup Wizard with Lackner Connect
  - a. When you arrive at the welcome screen, press Click to begin setup to proceed.



 b. At the first step of the setup wizard, you'll be asked to enter your Customer ID. Please do so, then press Next to continue.





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c. Next, because FMS is installed on this machine, you'll be prompted to configure the server. Choose Yes, then press Next to continue.



The configuration process has several steps. You will see several status screens while Lackner Connect disconnects any users, closes the databases, installs an SSL cert, and then starts things back up again.

P Lackner Connect, v1.1.0.22	- 🗆 X	# Ladiner Connect, v1.1.0.22	- 0 ×
File Edit View Utilities Tools Window Help		File Edit View Utilities Tools Window Help ∩ Home → Install SSL → Select Certificate → Close Database	্র
		SSL Certificate Installation Wizard	<b>a</b> .
		Please Wait	
		Closing database files	
Please Wait		Connected Users Closed Files	
		0 122 of 122	
FMS19-01			
R Labor Const v1022	- n x	F Ladow Connet v1.10.22	x]
File Edit View Utilities Tools Window Help		File Edit Wew Utilities Tools Window Help	
SSL Certificate Installation Wizard	122	SSL Certificate Installation Wizard	* L;*
			_
		Please Wait	
		Opening asraase wes	
		0.(122	
star_clientsecure_ia			



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#### **TEHNICAL SIDENOTE:**

During this process, Lackner Connect will establish a dedicated sub-domain name for your server which will be mapped to the LOCAL IP address of your server. The sub-domain in this **example** was created and mapped as follows. Note that the values on your server will be unique to your installation:

```
Domain Name: test123.clientsecure.lacknergroup.com
IP Address: 192.168.254.176
```

In the next steps, we'll use that domain name to connect your users to the FileMaker server. It is this mechanism that allows us to bind an SSL certificate to your environment for encrypted communication. If your organization has any questions about this cert or domain name mechanism, it should feel free to reach out to us. We fully support the use of custom domain names and certs, if your organization prefer to use its own.

d. Finally, after a custom configuration has been generated and installed for your server, you are presented with a review screen. Make any changes you like to the settings and then press FINISH to continue.





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e. The last step of the server setup wizard is a bonus: A special code is generated to help facilitate fast setup for all of your users. When you install or upgrade to FileMaker 20 and Lackner Connect on your users' desktops, use this code in the setup wizard instead of the Customer ID, and they will be automatically set up with a single click.

ile Edit View Utilities Tools Window Help	Configuration → Review	Using this code when setting up or re-configuring your users will expedite the process.	ц. Ц.
You're done! Share the 'Quick Setu end. If you choose, you can modify t	p code' with your colleagues he display name and comme B9B2	c recilitate a faster setup on their s for this configuration. Copy to Clipboard	<b>?</b> More info
CONFIGURATION DETAILS: Display Name A simple name to display in the database list. Comments A brief comment or description.	6-in-1 Server on FMS19-01 Hosted on test123.clientsecur	e.lacknergroup.com	

f. Unless you opted to Launch Now in the review screen, you'll be brought back to the main menu. Here's you'll see the configuration that you just generated in the list that is presented. This is a list, because some of our customers have more than one database or use a combination of InheriTax and 6-in-1. In that scenario, Lackner Connect can help manage all of the connections in one interface.



g. At this point, you're ready to let Lackner Connect update your 6-in-1 databases. Please proceed to the next step.



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#### 15) Launch 6-in-1 from Lackner Connect to initiate update

Finally, Lackner Connect will facilitate the update of your 6-in-1 databases.

a. Your 6-in-1 database is presented in the list on the home screen of Lackner Connect. Click at any time to launch 6-in-1. If the server isn't ready, no worries, you'll be given a message about the status, and then returned to this home screen. You can always click the Refresh button on the top right to update the status.



 b. Once the database is ready and available, launch 6-in-1. Then, since your current 6-in-1 database needs to be updated, Lackner Connect will prompt you, asking if you'd like to update it now. Press UPDATE to continue.





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c. You'll be brought to the first step of the server upgrade wizard. Please press Next to continue.

Lackner Connect, v1.1.0.22		-	
Edit View Utilities Tools Window He	p		
			Ľ
Jpgrade Wiza	rd		
This wizard will step you th	rough updating your 6-in-1 database on a FileMaker Server.		
Press 'Next' to continue!			
Database Name	6-in-1 Server on FMS19-01		
Software Title	6-in-1		
Network Location	test123.clientsecure.lacknergroup.com		
Comments	Hosted on test123.clientsecure.lacknergroup.com		
	······································		
CC Co Back	Next	~	

d. IF there are users still connected to the server, the wizard will help you identify them so that you can communicate with them personally if you so choose. You can simply continue, however, and the wizard will send them a message and will SAFELY disconnect them after about 30 seconds.

Lackner Connect, v1.1.0.	15 Taala Miadam Hala		-	D X							
Home > 6 in 1	Server Lingrade -> Close Database			- শ্ব							
	o Wizord			5							
Opyrau											
INSTRUCTIONS											
This next step disconnects active users and closes the databases on the server. Please review											
the list of connected users below, then press 'Next' to continue.											
There is 1 user currently logged into the system. If you proceed, they will be sent a brief											
message that the system is being updated, and will then be disconnected.											
D	User Name	Computer Name									
13	Andrew Cummings	DivoMax4									
< C C C	Back		Nevt >>								
	Dack		Next >>								





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e. Once the users have disconnected, the wizard will close the 122+ database files to prepare for the update.



When the files are all closed, the wizard will proceed to download the latest update package.



When the update is downloaded and applied, the wizard will launch 6-in-1, which will begin its update sequence.



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f. Next, you'll a screen that looks like the following. This process can take several minutes, so please do not touch your keyboard and do let it run. If the screen appears to freeze and you do not see changes, or the screen even looks blank, just leave it as is – it will complete in as little as 3 minutes... or up to 30-35 minutes or more, depending on the size of your databases.

P Helper File Edit View Insert Format	Records Scripts Toc	ls Window Help	new vo	ersion.	Lapsed time 0 min 5 sec			
<ul> <li>While the upgrade is running:</li> <li>1) Do 'not' touch the keyboard</li> <li>2) Do 'not' switch to another scession</li> <li>3) Do ignore the white screen that may appear at the end (for up to 10 minutes)</li> <li>4) Do wait for the screen to display the "Close" button when the upgrade is finished</li> </ul>	Banks BenyShar Claimant Macros NJD PAD UBeny				7 of 26			
NOTE: This process an take several minutes!								

g. Once the 6-in-1 update process is finished, Lackner Connect will then Open all the database files under FileMaker Server so that 6-in-1 will again become available to users. This can also take several minutes.





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h. Finally, you'll be brought back to the last page of the wizard.



Press DONE to continue to the main menu of Lackner Connect.

### 16) Notify 6-in-1 Users

Finally, with all the database files open, you're done! Please notify your 6-in-1 users that they may log back into the system at their convenience.

### Congratulations... You're DONE! ③