Installation Instructions

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

LACKNER GROUP
Estate & Trust Software

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 here.
- You <u>may</u> 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.

Steps / Table of Contents

Installation Instructions

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

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.

Installation Instructions

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

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).

2. **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.

Installation Instructions

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

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:
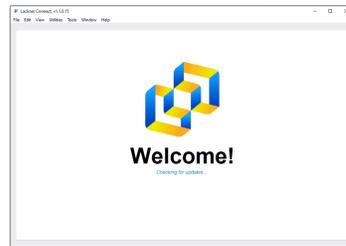
This new installation method using Lackner Connect is designed for customers to engage in as much "self-help" as possible without the need to coordinate technical support (with us *or* your IT personnel). Directions for how this works are short and sweet and can be found in Step 9 at the end of this 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:

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 your OS to accommodate the newer version during this calendar year</u> 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.

Installation Instructions

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
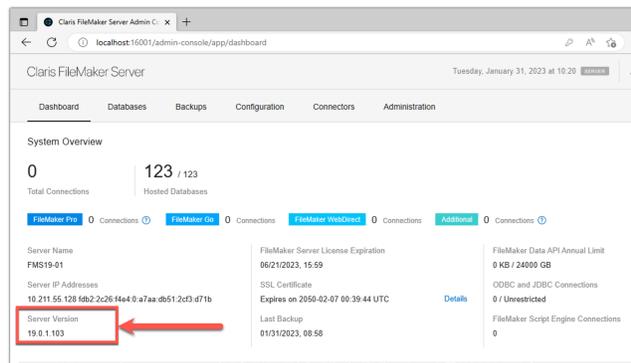
The following guide will help you update your FMS:

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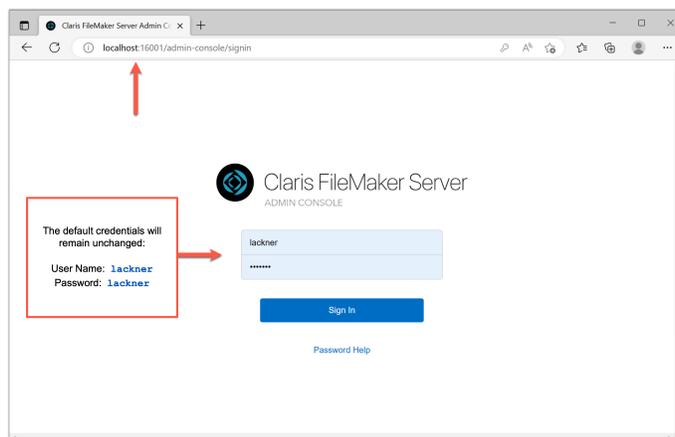
b. Upon login, you will be presented with a dashboard. Note the FMS version at the bottom left.

Installation Instructions

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

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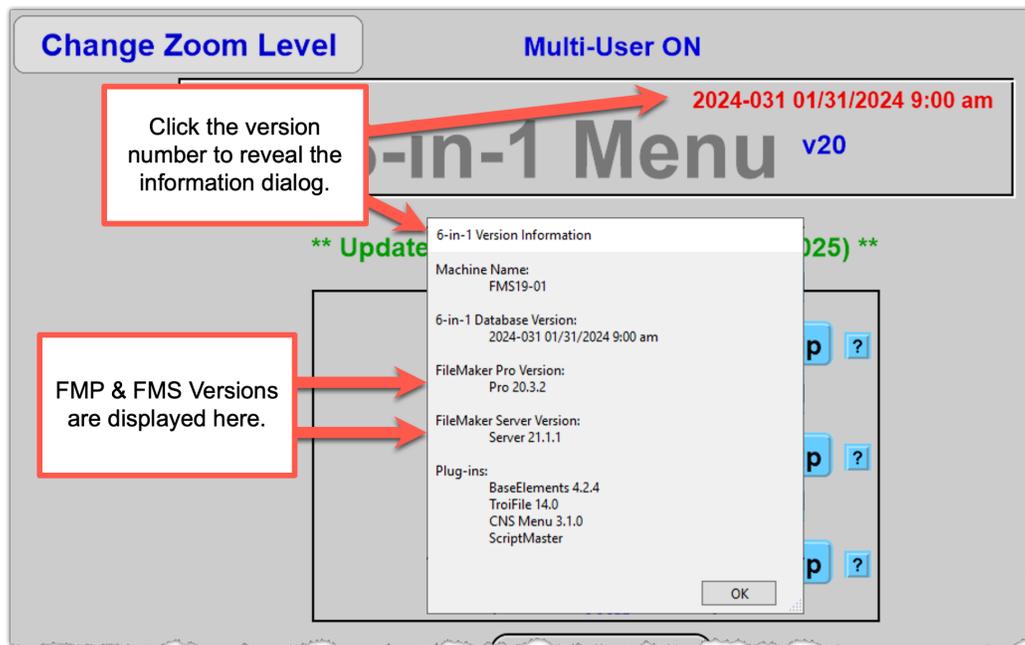
Note that you can also determine the FMS version from that same dialog.

Installation Instructions

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

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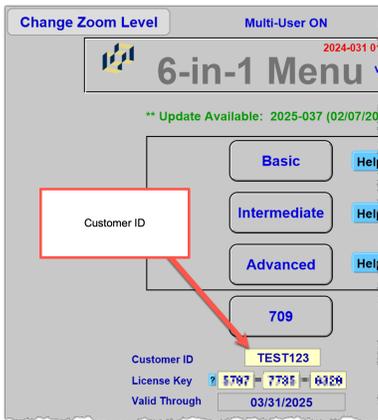
7) PREP: Make sure the FileMaker Server service is RUNNING

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.

HOW TO: Update 6-in-1 Server Edition for Windows Server
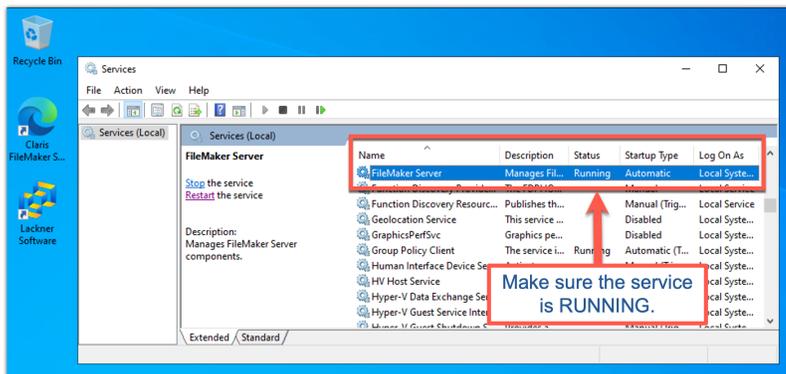
8) PREP: Make sure your firewall has the right ports open

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.

Add or Edit a rule for FileMaker Server to make sure it includes all relevant ports.
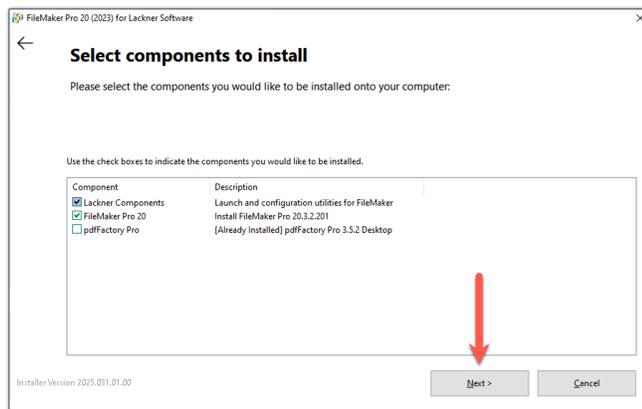
Installation Instructions

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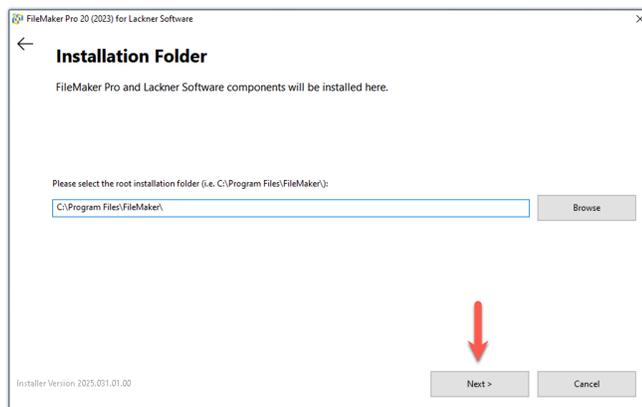Version: 21.1.1.40 | 2025-050 | Launcher v2.2.0.1
Revised 2/22/2025

LACKNER GROUP
Estate & Trust Software
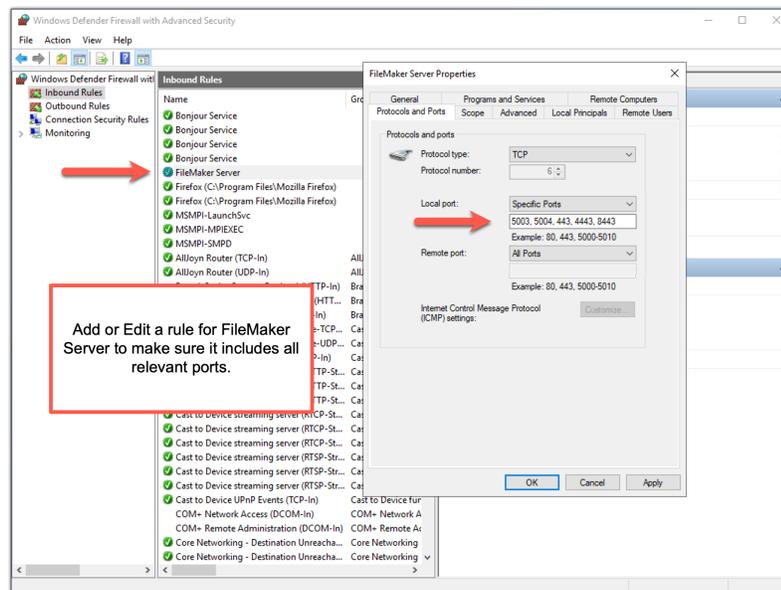
9) Download the latest installation package for FileMaker Pro

Before you start, let's make sure you're working from the latest version of FileMaker Pro available on our downloads page:
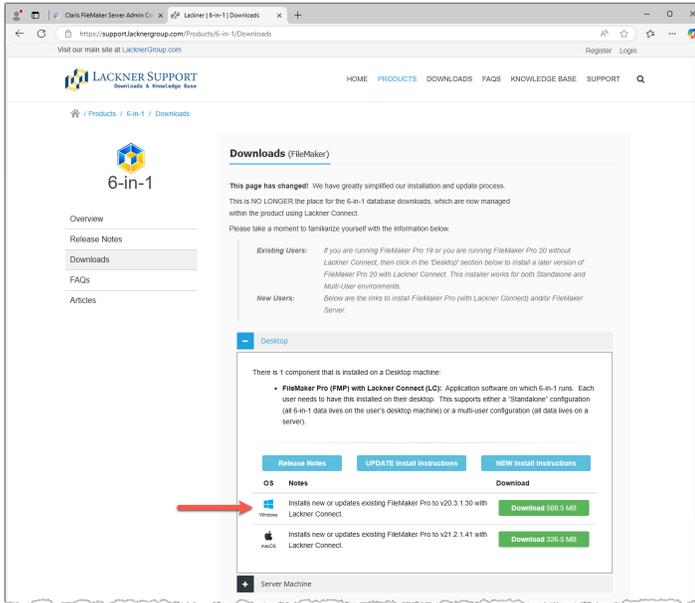
10) Run the installer "as administrator"

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.

LACKNER GROUP
Estate & Trust Software

Installation Instructions

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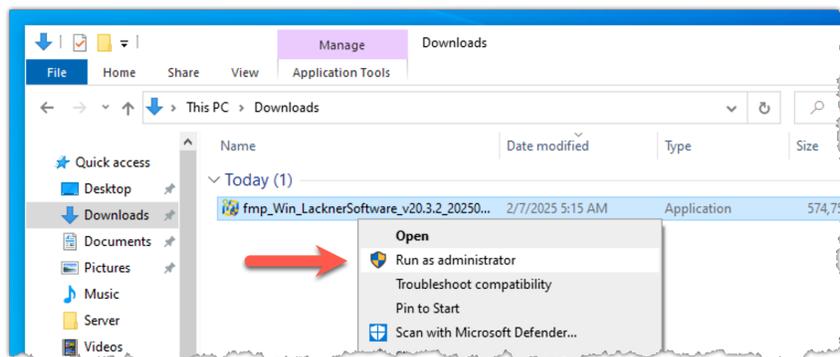
c.   If prompted by UAC (User Account Control), please choose Yes to allow changes to your device.

11) Step through the installation wizard

a.   When the installer loads the welcome screen, click Next.
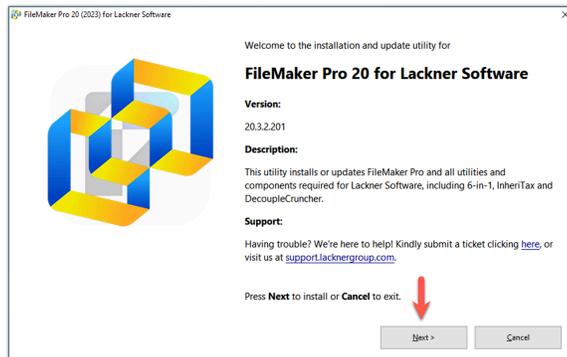
b.   You will next be prompted for a password. Please enter the password showtime and then press Next.
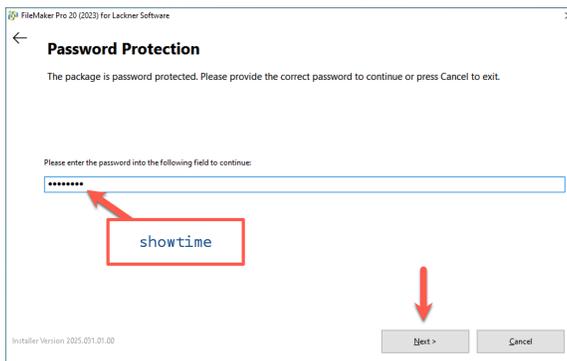
c. Next, the installer will automatically select what it recommends. If you already have an earlier version of FileMaker 20, it will pre-select an UPDATE button rather than the INSTALL button seen in the screen shot below.

On server, you do NOT need pdfFactory Pro.

To continue, press Next.

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.

Installation Instructions

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

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.
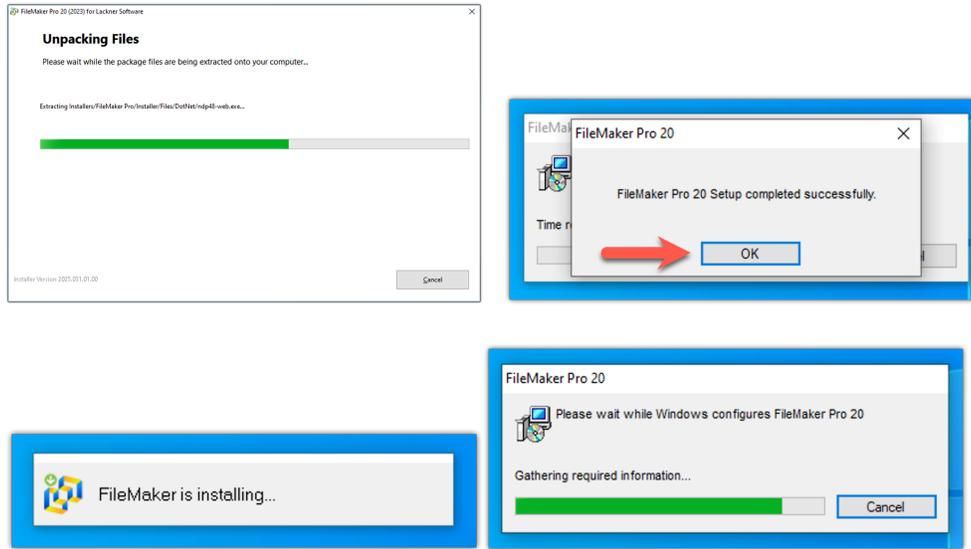
f. Next, you'll see fonts installing, followed by a confirmation that configuration has taken place. Press OK to continue.
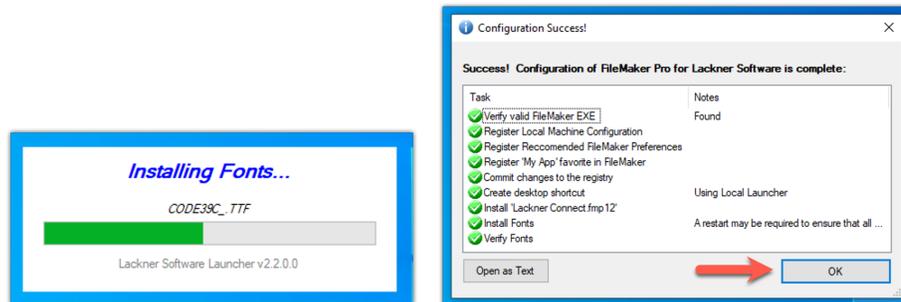
g. Next, you'll be asked if you want to restart the server. This is because of the font installation. We suggest you choose `Restart Later`, then press `Next` to continue.
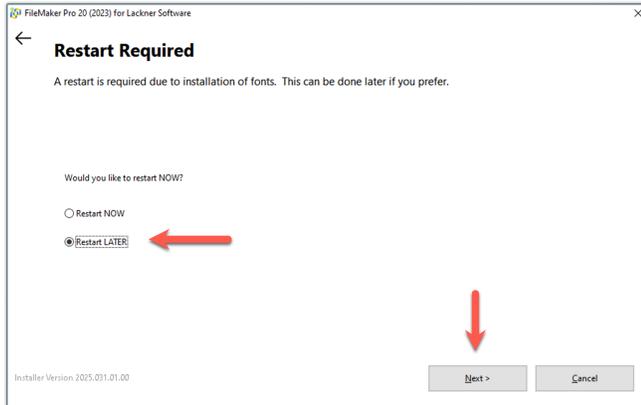
h. Finally, please choose to `Launch Lackner Software` and `Close` the installer
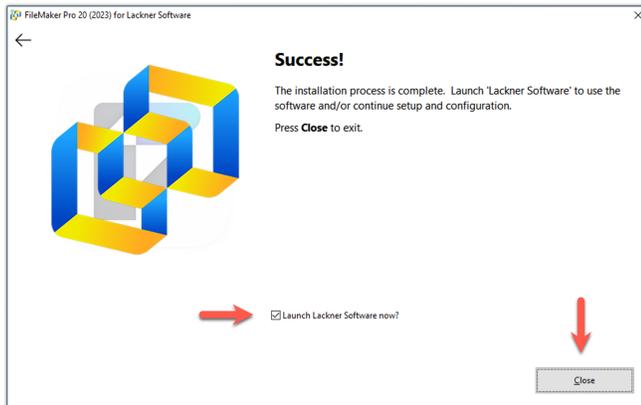
i. When the update completes, press `Finish`. This will launch FileMaker & Lackner Connect.

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.
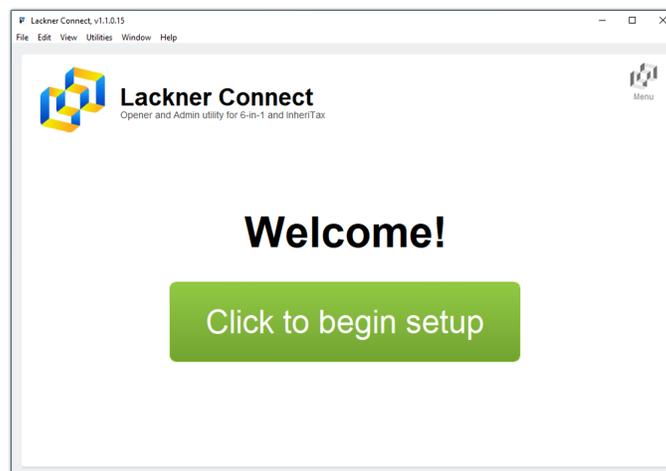
Installation Instructions

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

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.
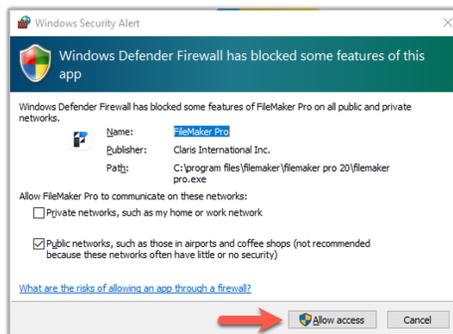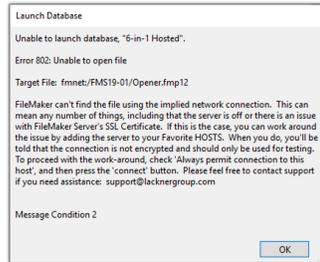
Installation Instructions

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

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.
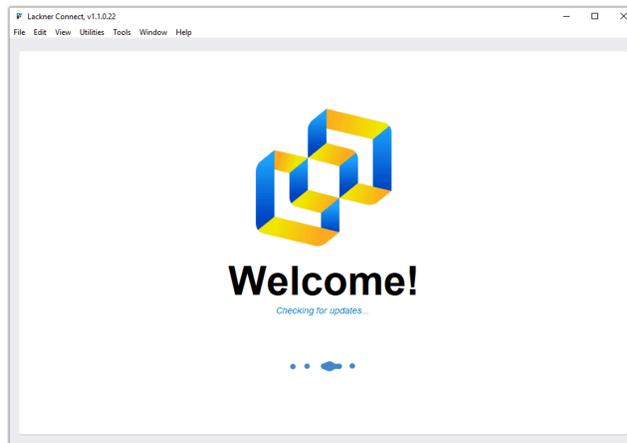
e. In most cases for THIS update, we recommend starting fresh and configuring Lackner Connect anew. Depending on how 6-in-1 was configured in the past, one of these three scenarios will present itself:

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.

Installation Instructions

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

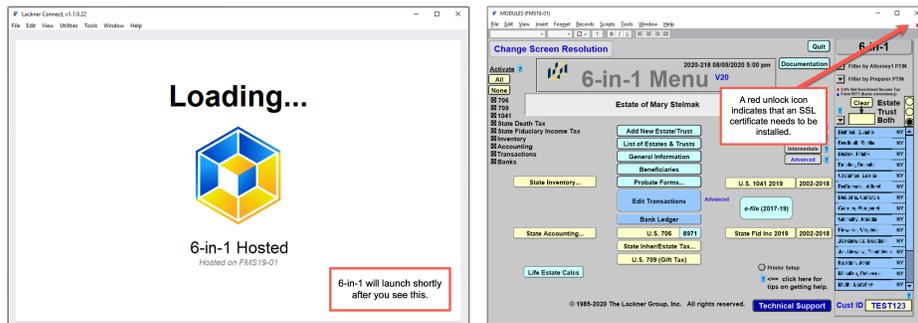2. You'll see a variation of an error like this because a prior configuration is not working:

Following that message, you'll be brought to the Lackner Connect home screen.
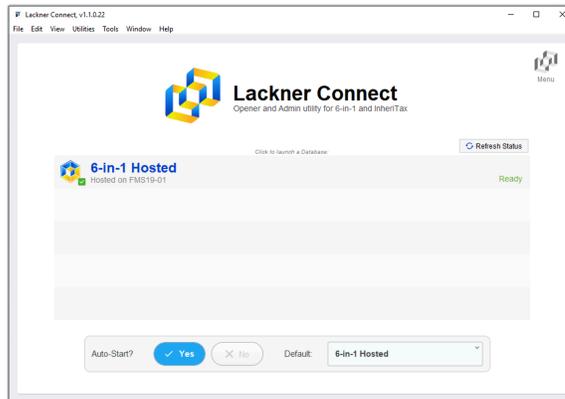
Please continue to Step 13 to reset Lackner Connect.

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

Installation Instructions

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

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`.
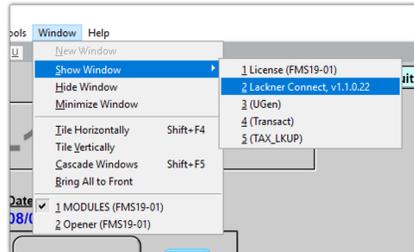
13) Conditionally, Reset Lackner Connect

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

Installation Instructions

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
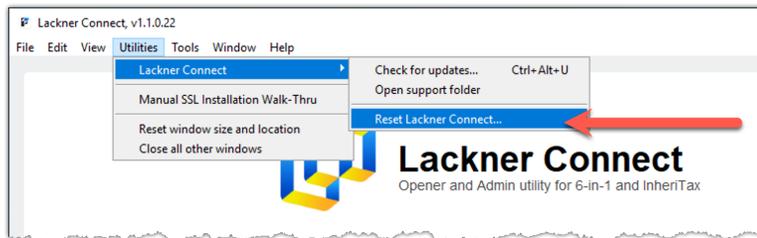
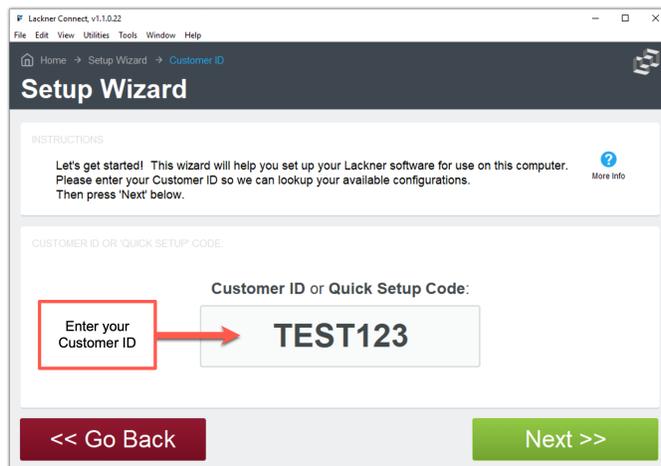## 14) Configure the server using the Setup Wizard with Lackner Connect

a. When you arrive at the welcome screen, press `Click to begin setup` to proceed.
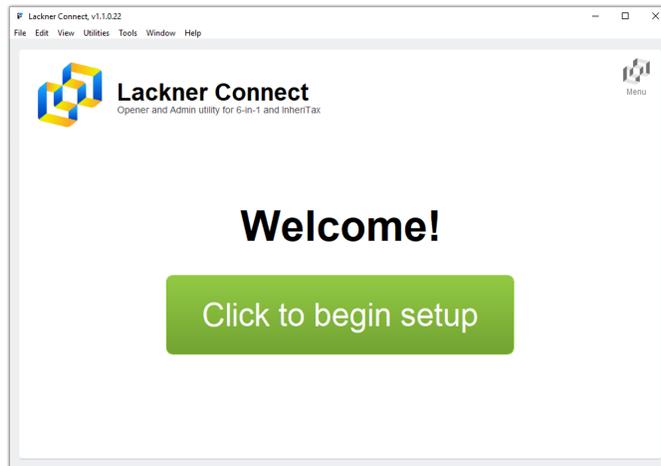
b. At the first step of the setup wizard, you'll be asked to enter your `Customer ID`. Please do so, then press `Next` to continue.

Installation Instructions

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

LACKNER GROUP
Estate & Trust Software

c. Next, because FMS is installed on this machine, you'll be prompted to configure the server. Choose Yes, then press Next to continue.
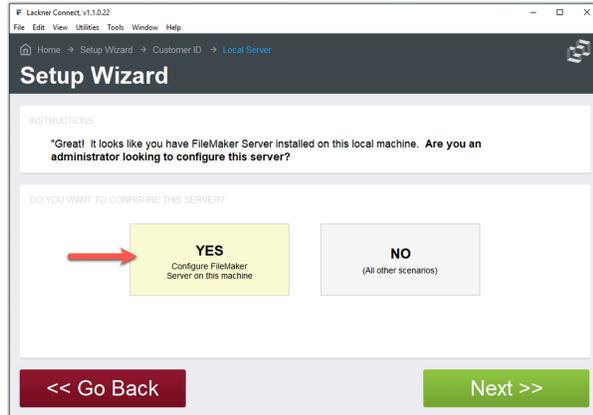
The configuration process has several steps. You will see several status screens while Lackner Connect disconnects any users, closes the databases, installs an SSL cert, and then starts things back up again.
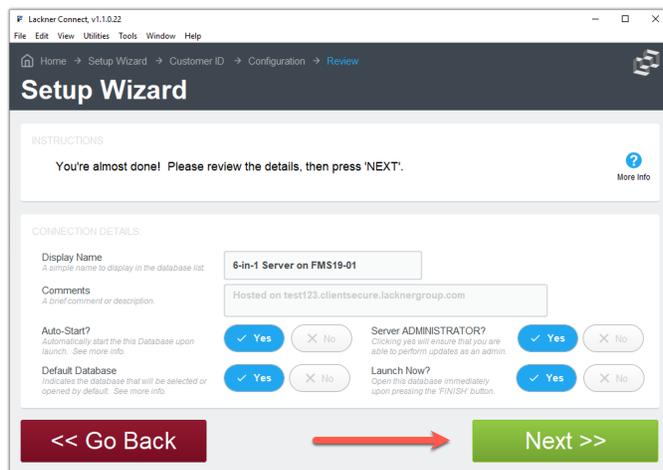
Installation Instructions

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
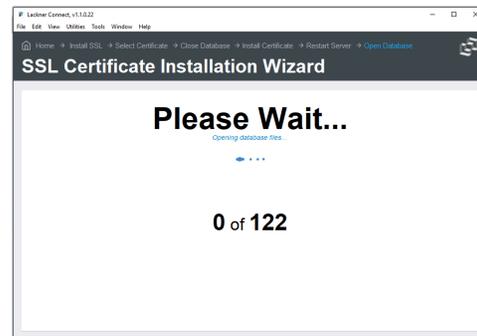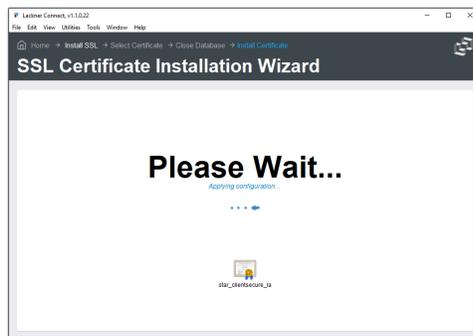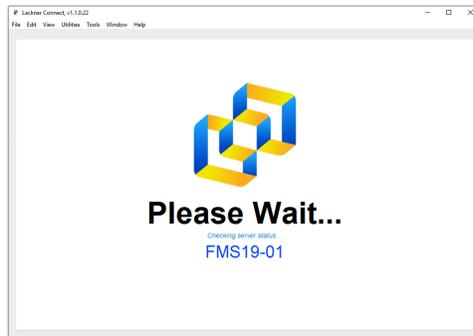
TEHNICAL SIDENOTE:

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.

Installation Instructions

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

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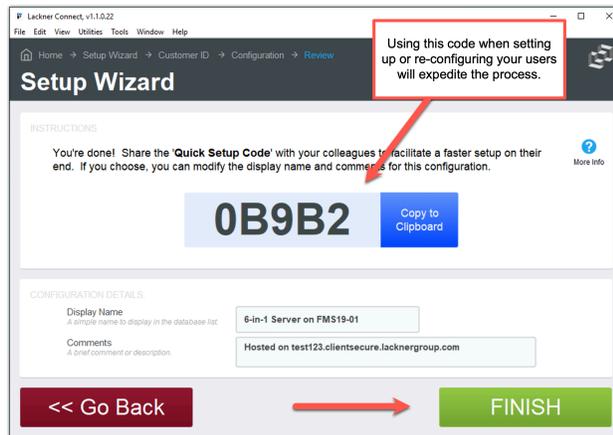
f. Unless you opted to Launch Now in the review screen, you'll be brought back to the main menu. Here's you'll see the configuration that you just generated in the list that is presented. This is a list, because some of our customers have more than one database or use a combination of InheriTax and 6-in-1.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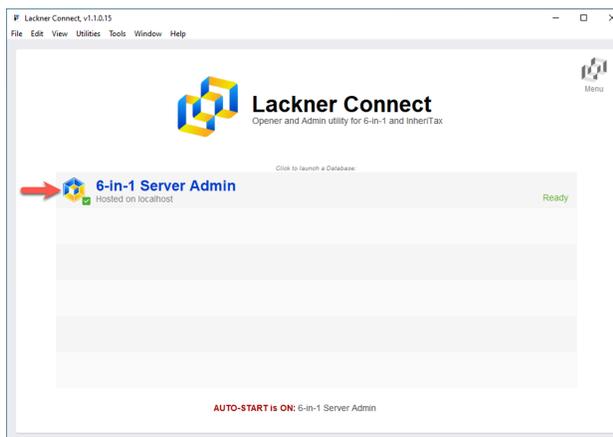

g. At this point, you're ready to let Lackner Connect update your 6-in-1 databases. Please proceed to the next step.

Installation Instructions

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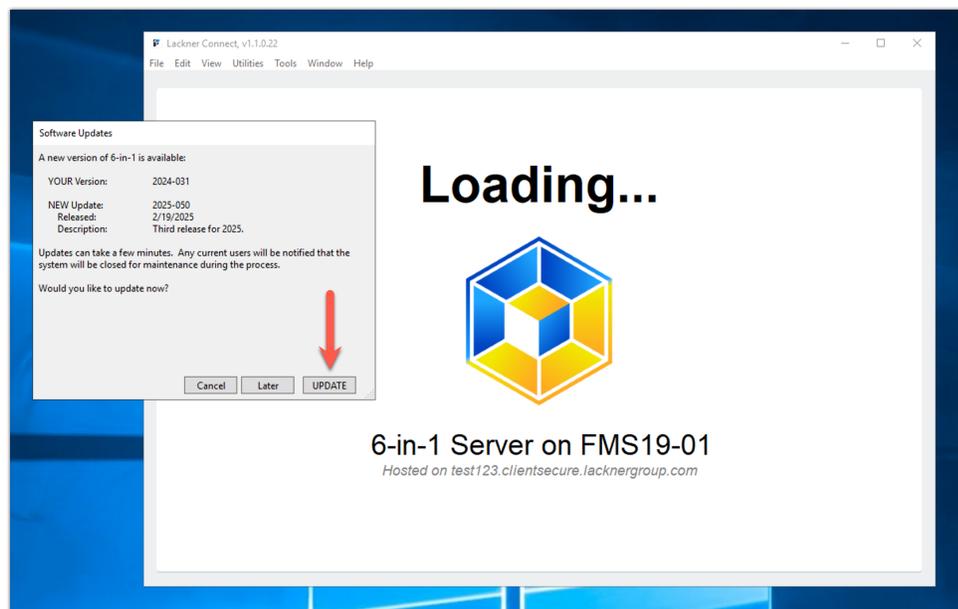Version: 21.1.1.40 | 2025-050 | Launcher v2.2.0.1
Revised 2/22/2025

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.
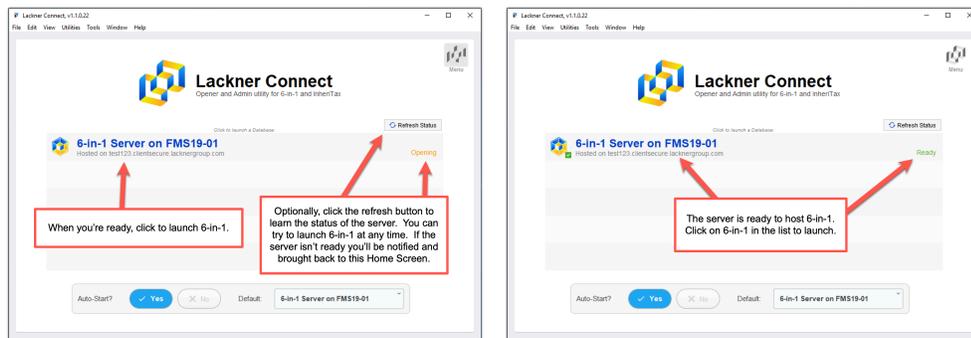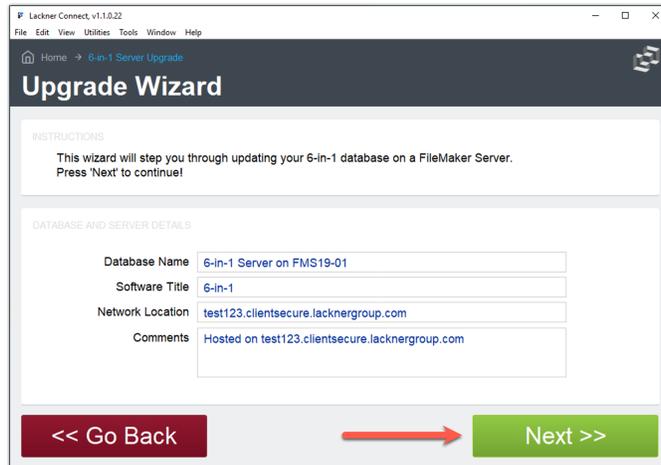

b. Once the database is ready and available, launch 6-in-1. Then, since your current 6-in-1 database needs to be updated, Lackner Connect will prompt you, asking if you'd like to update it now. Press UPDATE to continue.

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

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.
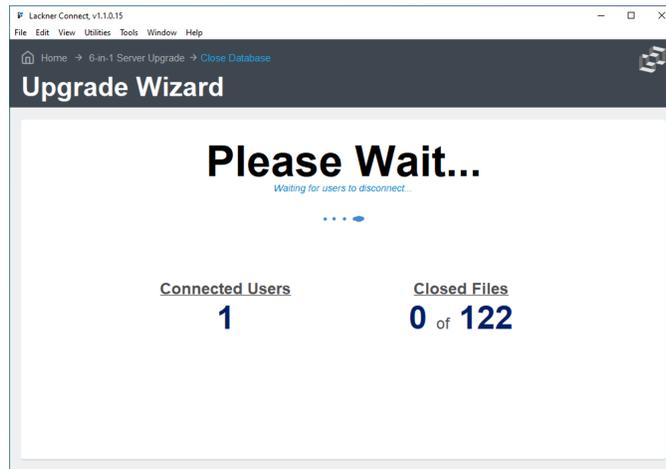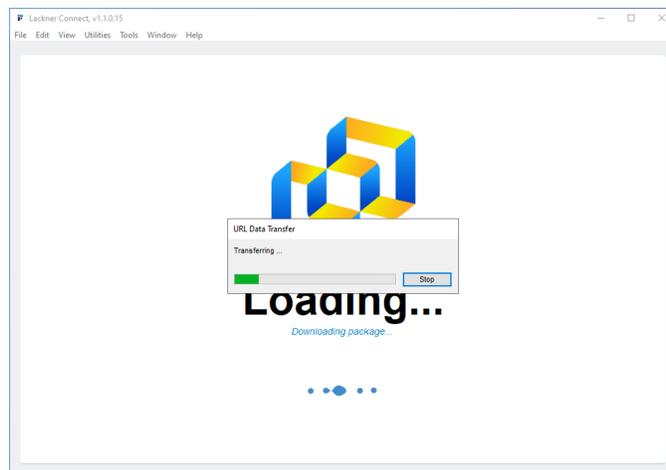

Press Next to continue.

Installation Instructions

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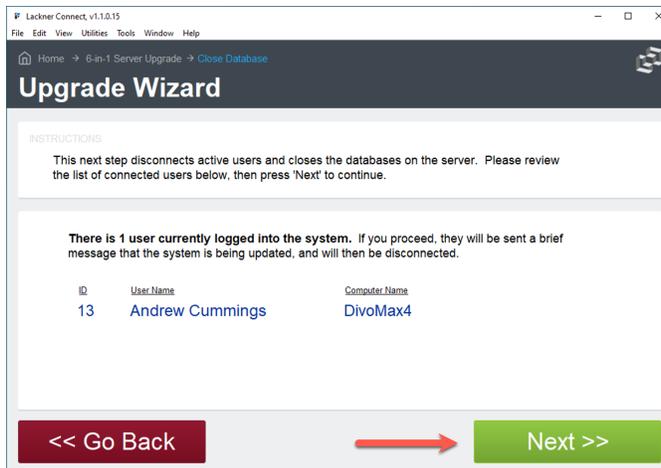
e. Once the users have disconnected, the wizard will close the 122+ database files to prepare for the update.

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.

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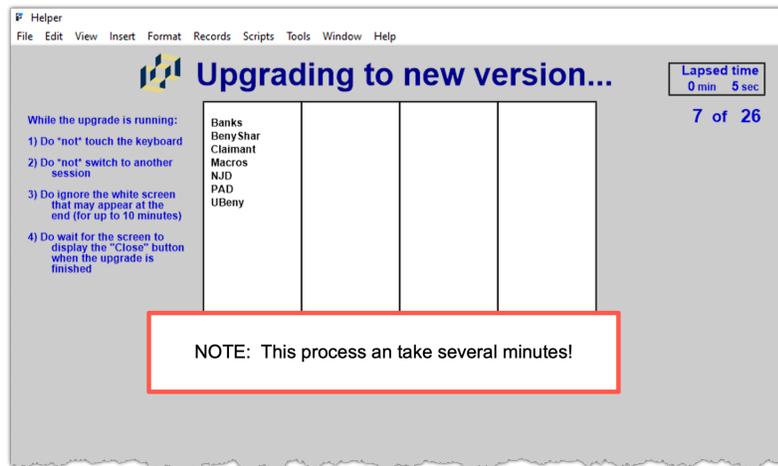
g. Once the 6-in-1 update process is finished, Lackner Connect will then Open all the database files under FileMaker Server so that 6-in-1 will again become available to users. This can also take several minutes.

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

Installation Instructions

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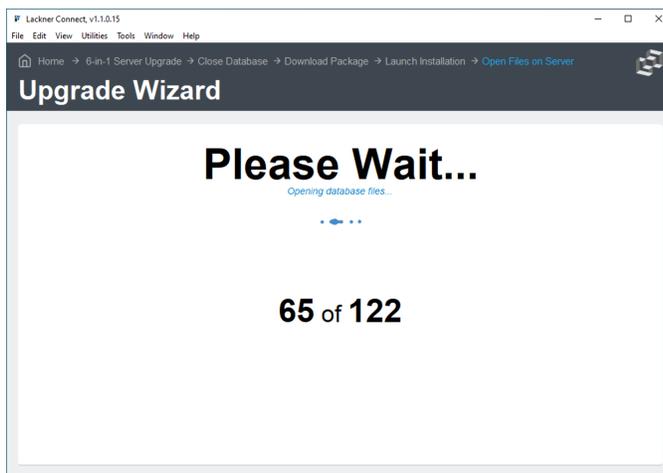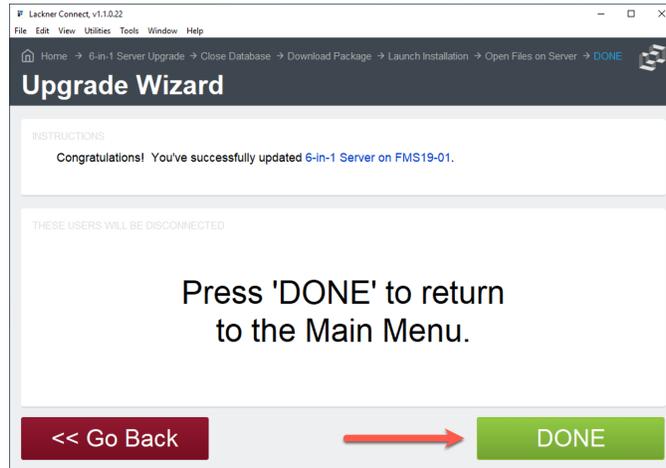Version: 21.1.1.40 | 2025-050 | Launcher v2.2.0.1
Revised 2/22/2025

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! ☺