
ToolBox CS installation instructions

Use this document to do the following:

- install ToolBox CS®,
- download and install the license, and
- run desktop setup (for network installations only).

Installing ToolBox CS

You can install ToolBox CS to a network or to a standalone computer.

Notes

- If your firm chooses to run ToolBox CS in a terminal server environment, a certified terminal server professional must complete the installation. See [Terminal Server Best Practices for CS Professional Suite Applications](#) for general information to provide to your firm's terminal server technician.
- The installation process may require you to restart the computer. If you're installing the application on a network, be sure that all other users have logged off the network.
- **Users of 2012 ToolBox CS and earlier:** With the 2013 release of ToolBox CS, we eliminated the requirement of Microsoft SQL Server for your database. After you install ToolBox CS version 2013 or later, your database will be converted automatically the first time you start the application.

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1. If you haven't done so already, download the application installation file from our website. (See the [ToolBox CS download page](#) for instructions.)
 2. Verify that you're logged in to your computer or server as an administrator.
 3. Close all open applications, including background virus protection applications.
 4. Navigate to the EXE file that you downloaded from the website. If you saved the file to the browser's default location, the EXE will be in your DOWNLOADS folder.
 5. Double-click the EXE to extract the files to the default folder (**C:\ToolBox CS 2019.x.x Download**) or to another folder of your choosing. (If you plan to install ToolBox CS on multiple workstations, extract the files into a folder on a network drive.) If the installation wizard doesn't start automatically, navigate to the folder to which you extracted the files and double-click **Setup.exe**.
 6. When ToolBox CS Setup starts, click the Install ToolBox CS link.
 7. In the Welcome to ToolBox CS Setup screen, click Yes to verify that you're installing the application on the computer on which you would like your ToolBox CS database to reside. Click Next to continue.

Note: If you click the No option, you'll be prompted to start again on the computer on which your database will reside.

8. Read the CS Professional Suite License Agreement, mark the *I accept the terms in the License Agreement* checkbox, and click Next to continue.

9. For Installation Step 1, click Next to select where the ToolBox CS shared files will reside. Files shared by ToolBox CS installations are used for integration with other applications, for storage of configuration settings, and for workstation installations. Click the button next to the field and navigate to the appropriate folder.
 - If you aren't going to run ToolBox CS on a network, this folder is usually C:\WINCSI.
 - If you run ToolBox CS on a network, select a shared network folder such as X:\WINCSI or \\<name of network share>\WINCSI.Click OK, and then click Next to continue.
10. For Installation Step 2, click Next to start the installation program, which will install ToolBox CS and the necessary components. Any components not already checked will be installed. You may need to restart your computer one or more times during this step. Click Next to install ToolBox CS and any unchecked components.
11. The setup wizard now displays instructions for completing the ToolBox CS setup for a network. As described on page 3, you'll need to run the desktop setup program at each computer that will run ToolBox CS. You can save or print the instructions that appear in the setup wizard. Click Next to continue.
12. When you're prompted that the installation is complete, click Finish.
13. Delete the **ToolBoxDownload_2019_x_x.exe** file from the local drive where you saved it.
14. After completing the installation, follow the steps in the "Downloading and installing the license" section below.

Downloading and installing the license

After you install the application files, use CS Connect™ to download and install the license.

1. Verify that you're logged in to your computer or server as an administrator.
2. Start ToolBox CS.

Notes

- If CS Connect doesn't open automatically, choose Help > About ToolBox CS, and click the Download Licenses button.
- If you used 2012 ToolBox CS or earlier on this computer, a one-time, data-conversion process will run.

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3. Enter your firm ID (listed on your CS web account and on your mailing label) and your PIN, and click Next.

Note: If the Connect – Communications Setup dialog opens, verify or select the applicable communications settings, and then click OK to close the dialog.

4. In the CS Connect dialog, click the Call Now button. CS Connect logs in to our secure data centers and downloads your license.
5. Follow the remaining prompts to install the license.

6. To view and print the Getting Started guide, choose Help > Help & How-To. In the Alerts and Notices section on the right, click the **ToolBox CS Getting Started guide** link.
7. If you installed ToolBox CS on a network for the first time, proceed to the “Running desktop setup” section below.

Running desktop setup (for network installations only)

Important! If you installed ToolBox CS on a network and if this is the **first** installation, you must also run the desktop setup program on **each workstation** that will run ToolBox CS.

The desktop setup program ensures that each workstation meets the minimum operating system requirements and confirms that all required components are installed. When you run desktop setup, a shortcut to the single network installation of ToolBox CS (on your firm's server) is added to each desktop. This keeps all firm-wide files and data in a single location on the server. We recommend that network users do not install the full application on their local computers.

To run the desktop setup program from each workstation, do the following:

1. Verify that you're logged in to your computer as an administrator, then close all open applications.
2. Click Start on the Windows taskbar and choose Run.
3. In the Run dialog, enter **Z:\<path>\ToolBox CS\DESKTOP\Setup.exe** (where **Z** and **<path>** represent the server location where you installed the application and license files). For example, if you installed the application files in F:\WINAPPS\WINCSI, you would enter **F:\WINAPPS\WINCSI\ToolBox CS\DESKTOP\Setup.exe** in the Run dialog.

Notes

- ToolBox CS supports UNC path names. For example, you could choose **\\SERVER\RESOURCE\WINCSI\ToolBox CS** in the Run dialog. However, for better performance from each workstation, we recommend mapping a drive letter to a network path.
 - If you need to uninstall the ToolBox CS desktop setup from a workstation, choose Start Control Panel > Programs and Features, select ToolBox CS – Workstation, and then click the Uninstall button.
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4. Click OK and follow the prompts.