# Cash Advance Pro 5 Upgrade Instructions

1. **SHUTDOWN ALL PROGRAMS.** Close Cash Advance Pro and all other applications that are running. The database server (Cash Advance Pro Server) should be left running in the system tray until the conversion is completed.

2. **BACKUP** - Backup the entire Cash Advance Pro folder that is going to be converted. A simple backup would be to copy the entire Cash Advance Pro folder and all its sub-folders into a folder named C:\Backup.

3. **CHECK EXISTING VERSION** - Make sure the old Cash Advance Pro is running version 4.92 and is dated 3-26-08 or newer. To check the version and release date, from within Cash Advance Pro, go to Help / About. If necessary, run the appropriate update utility to bring the old system up to date.

4. **CHECK SOURCE DATA PATHS** – Go into the Cash Advance Pro Server and look at the Alias names (Config / Aliases). CashAdvPro is the standard alias listed. Note the path for it. If there are other aliases, make note of them and their paths. You will need to know this to make decisions later.

5. **RUN UPGRADE** - Run UpgradeCashAdvancePro.exe. Select appropriate task for source folder. Be sure to check the ff2nx upgrade utility log for any failures. The last line should say: 0 transfers failed. The UpgradeCashAdvancePro.exe utility will upgrade only the standard data folder. If there are other data folders that need to be converted, do the next step to convert them.

6. **UPGRADE ADDITIONAL FOLDERS IF NECESSARY** - If there are other data folders that need converting, such as Installment, Title, etc., do the additional steps notated at the bottom of these instructions right now.

7. **EDIT DESKTOP ICONS** – In many cases, setup parameters are being passed as command line arguments via the target box of the shortcut. This is especially true when multiple Cash Advance Pro icons exist on the desktop. It is important to edit these right now, or executing the icon may add improper aliases into the database server that will have to be removed manually. If the icon is named Cash Advance Pro, it should be renamed if you want to keep your edits because uninstall done later will look to remove a desktop icon named Cash Advance Pro.

8. **REGISTER SOFTWARE VIA INTERNET** – Doing this will update records at Bestware Inc. that the software has been updated.

9. **SETUP CONTRACTS & CUSTOM FORMS / REPORTS** – Existing active contracts (Contract.rtm, Contract2.rtm, Contract3.rtm, etc.) and custom forms on the old system need to be copied over to the new Reports folder. Do not copy all the reports over, because most reports have been converted already. Only copy customized active templates. Load them into the designer to convert them, and then save them with the new format. Some may require changing the RB components to non-RB components, such as changing RBARichText to standard RichText components. Custom reports also will need to be converted. See instructions for this notated at the bottom of these instructions. This should be done before uninstalling Cash Advance Pro 4.92.

10. **UNINSTALL** - Uninstall the old Cash Advance Pro. First shutdown the old Cash Advance Pro server. Find the Cash Advance Pro Server icon in the system tray, right click on it, and select Exit. Then navigate the start menu to Start / All Programs / Cash Advance Pro / Uninstall Cash Advance Pro.

11. **DELETE OLD CASH ADVANCE PRO FOLDER IF NECESSARY** - After uninstalling, check the original folder and make sure it is completely deleted. If the user had copied any other files into that folder, the uninstall program will leave the folder and those additional files. Delete the old Cash Advance Pro folder completely. If any other files are needed later, they can be found in the backup folder or in the recycle bin.

12. **SETUP SHARING AND OTHER COMPUTERS ON LAN** – If there are other computers on a local area network, setup sharing to \CashAdvPro and then edit the icon properties on the other computers.

**UPGRADE ADDITIONAL FOLDERS DETAILS**

1.  Open a command prompt.

2.  Navigate to new installation folder, which by default is: \CashAdvPro
    For example, enter: CD\CashAdvPro

3.  Run either Convert.bat or ConvertPF.bat. Convert.bat is run if the old Cash Advance Pro source files are located under \Cash Advance Pro, while ConvertPF.bat should be run if the old source files are located under \Program Files\Cash Advance Pro. Enter the batch file command (Convert or ConvertPF) followed by the data source folder name. For example, if the data source folder is named Installment, enter: Convert Installment

4.  Check the results of the conversion to make sure there were no failures. If so, review the log to find out what file was the problem.

5.  The upddef.exe utility is run automatically from the convert.bat file. Its log is located in the newly created data folder as upddef.txt. Usually it is not necessary to check this log unless there are problems later when running the Cash Advance Pro 5 application.

6.  Edit desktop icons to target \CashAdvPro instead of \Cash Advance Pro or \Program Files\Cash Advance Pro. When the icon is executed, and the alias name is the same as the folder name of the alternate database, a new alias will be created automatically. If this is not the case, the alias will need to be added to the Server manually.

7.  Important – Re-Save Alias List – Only for systems with multiple databases, resave the alias list for future updates. Otherwise, future updates will have errors. Go to File / Change Database / Save Alias List.

**CONVERT CUSTOM REPORTS DETAILS**

1.  In the designer of Cash Advance Pro 4.92, use File / Save to File to save the report to disk. Alternatively, if the data manager nxMgr was installed, it can be used to view the reports located in the file rbItem.nx1. Copy and paste the blob field into a text editor, then copy and replace back again after editing (step 2).

2.  Load the template into a text editor and do the following Find and Replace operations (note that the single quotes are important and need to be specified in the Find and Replace command:
    a. Change: daff to danx
    b. Change: 'DateTime' to 'DateT'
    c. Change: 'Datetime' to 'Datet'
    d. Change: 'dtFlashFiler' to 'dtNexusDB'

3.  Save the file to disk in the new reports folder (CashAdvPro\Reports), or save the rbItem.nx1 record if using nxMgr. Load the template into the Report Designer in Cash Advance Pro 5.0 under Reports / Custom Reports. Then save the report to the custom report area using File / Save As.

Note that three external custom reports are used by the system: MRStmt.rtm, PCStmt.rtm, and PCChk.rtm. It is useful to have these loaded into the custom reports area for doing reprints of Misc. Receipt and Petty Cash Statements and for printing petty cash checks. If they have been loaded already into the custom report area, they probably have more meaningful names (e.g., Petty Cash Statement). Use the File / Load from File option to load them and the File / Save As option to save them in the custom report area, overwriting the existing previous report name if it exists already.