

## Upgrade Networked Installation from Amphis Customer v2.6 to Amphis Customer 3.0

### IMPORTANT - DO NOT UNINSTALL AMPHIS CUSTOMER v2.6

These instructions are for a networked Amphis Customer v2.6 installation where you have client PCs all connecting to a customer.mdb file on a server and templates and documents folders on a server

#### phase1

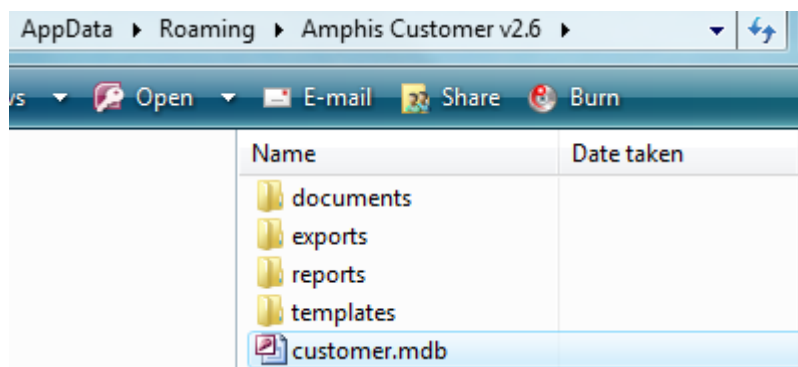
close all instances of Amphis Customer

back up the customer.mdb file on the server

back up the documents and templates folders on the server, also the exports and reports folders.

choose a client PC for initial upgrade to Amphis Customer 3.0, we'll call it PC1 for now.

on PC1, run Amphis Customer v2.6 and go to Tools->Folders->View Data Folder to get to the folder where the v2.6 customer.mdb lives.



we are going to replace this customer.mdb with the one from the server to perform the database upgrade on PC1.

close Amphis Customer.

copy the customer.mdb file to PC1 from the server and replace the one you can see from the Tools->Folders->View Data Folder (leave a copy on the server)

go to the Amphis Software home page :-

[www.amphis-software.com](http://www.amphis-software.com)

and click on the **Download Free 30 Day Trial** link to download the .msi file for Amphis Customer v3.0 to PC1.

#### phase 2

run the .msi file to install Amphis Customer v3.0 on PC1

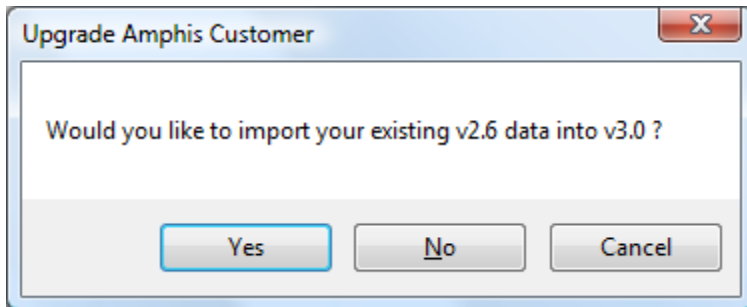
click on the Amphis Customer icon to run Amphis Customer - this should run v3.0 and it will tell you that you have 30 days left of the trial.

(we will send you new license strings for v3.0 once the installation is complete)

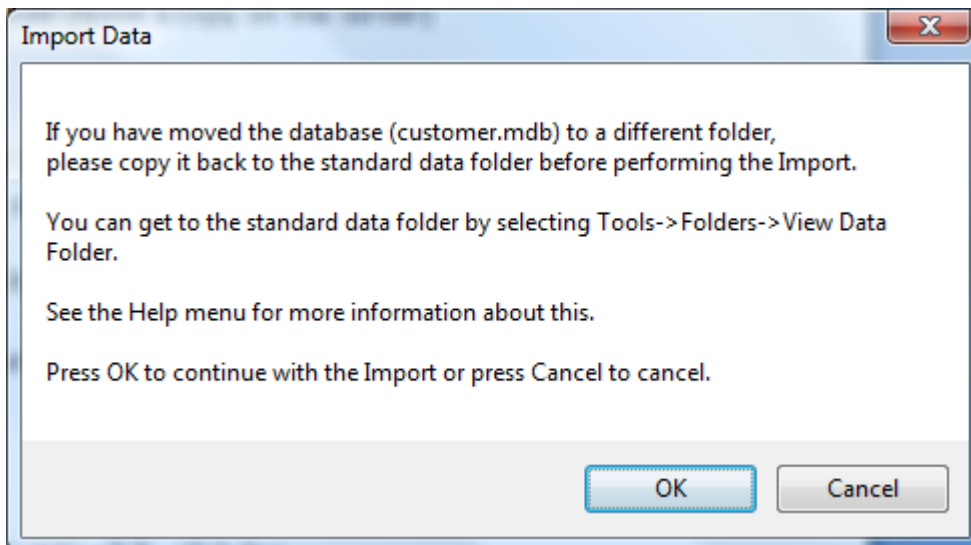
click Continue Evaluation



it should ask you if you want to import your v2.6 data into v3.0  
click **Yes**

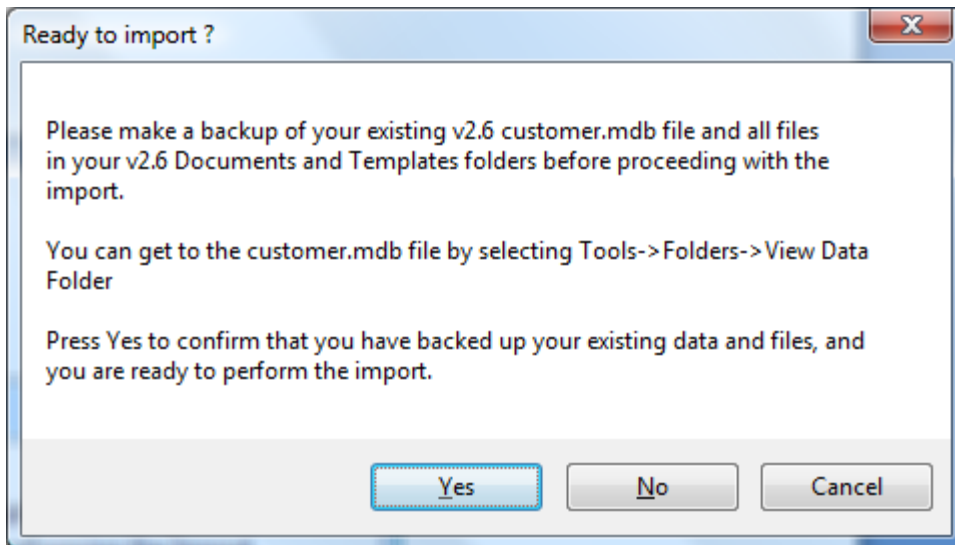


then you should see this



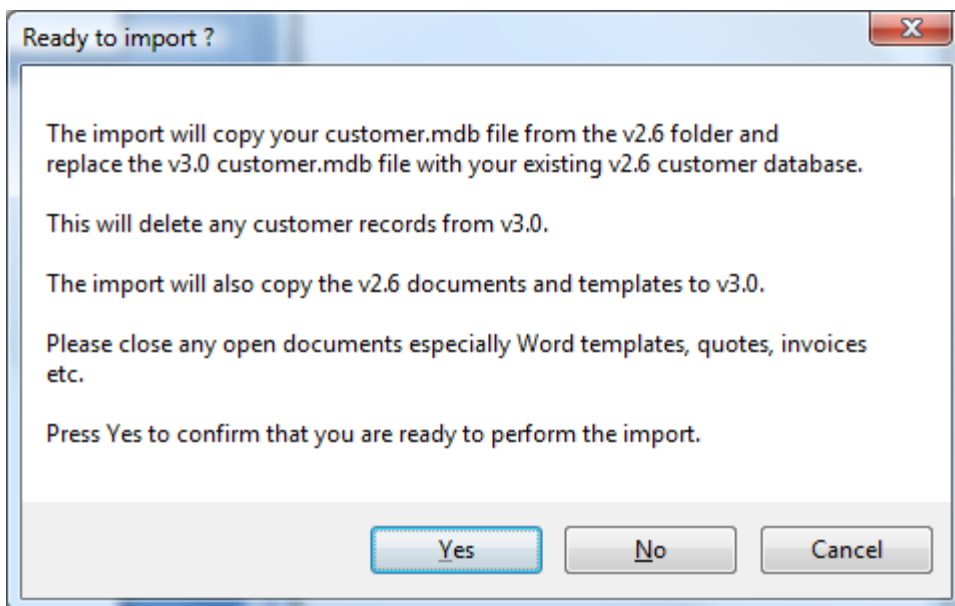
click **OK**

then you should see this



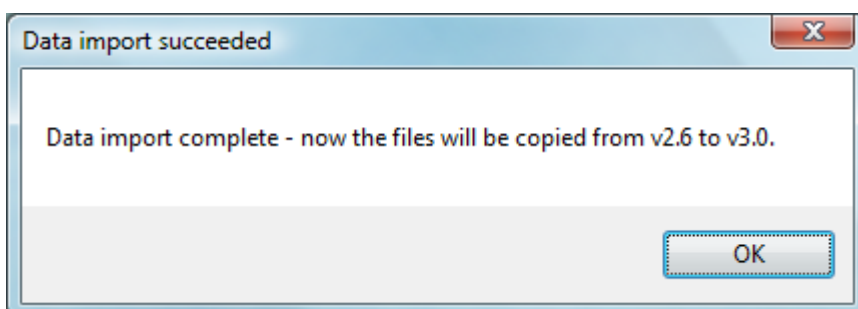
click **Yes**

then you should see this



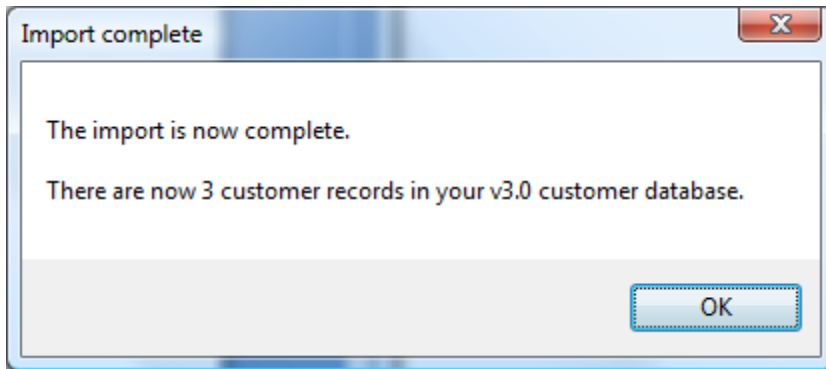
click **Yes**

then you should see a message saying Import succeeded.



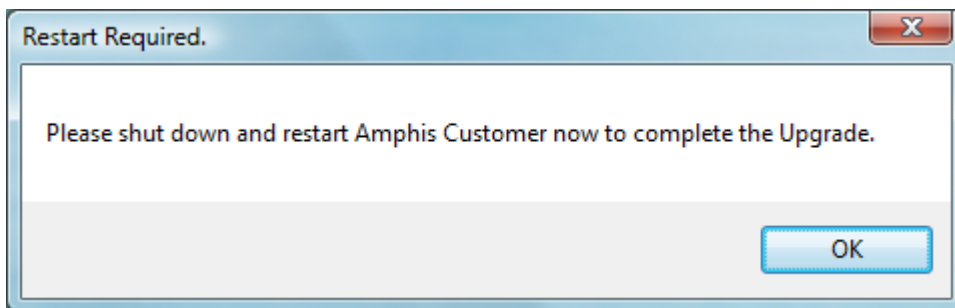
click **OK**

then you should see this (with the number of customer records copied to v3.0)



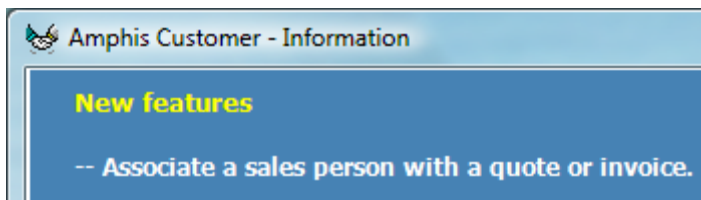
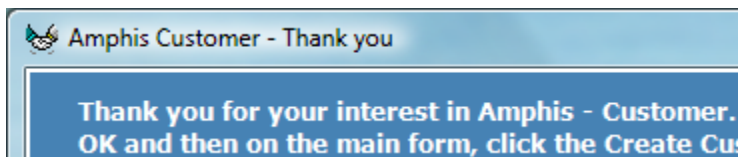
click **OK**

then you should see this

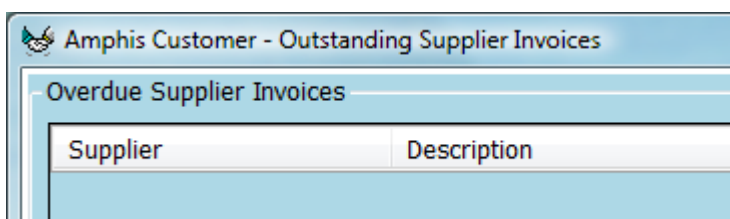


it is important that you restart Amphis Customer as soon as you get to the main screen.

click OK on both welcome screens,

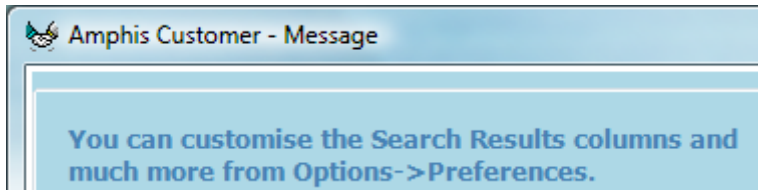


you will see a page showing any Outstanding Supplier Invoices



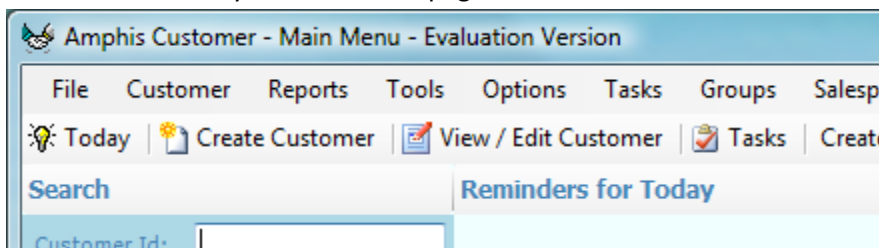
click **Close**

you will see a message about customization options.



click **OK**

then it should take you to the main page



(initially v3.0 on PC1 is now pointing to the local database and local templates and document folders on PC1 so we could perform the database upgrade)

click Search and you should see a list of your customers (note that your documents eg invoice files will not be available yet until the config is updated). do not attempt to create new invoices or anything just yet - just click Search and check you can see a list of customers.

select File->Exit and shut down Amphis Customer.

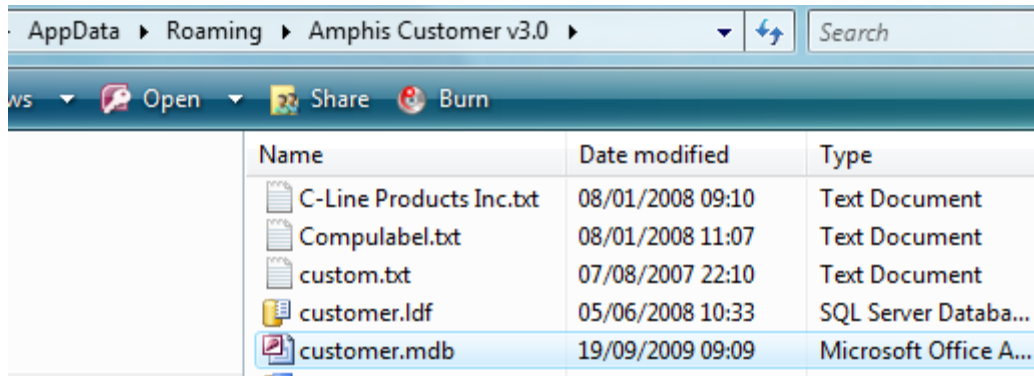
**phase 3 (only do this when you have successfully seen the list of customers from Amphis Customer v3.0 on PC1)**

now we will copy the upgraded database back to the server.

start Amphis Customer on PC1

(do not use Amphis Customer on the other PCs yet)

go to Tools->Folders->Data folder to see the Data folder for v3.0.



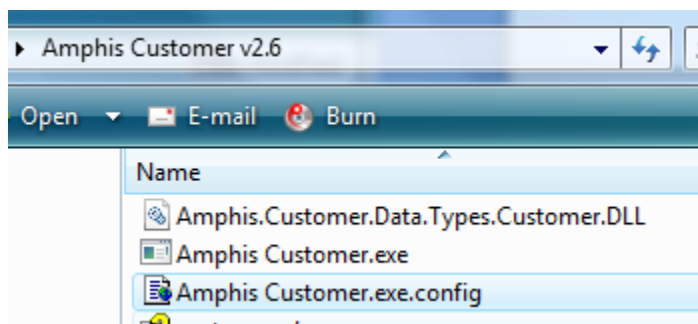
close Amphis Customer.

copy customer.mdb from the v3.0 data folder on PC1 to the server to replace the previous customer.mdb on the server (check you have a backup of the earlier one on the server)

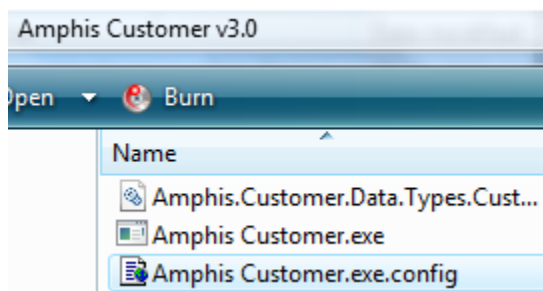
make a backup of this new v3.0 customer.mdb file on the server.

now we need to change the config on PC1 to point back to the server.

copy the v2.6 amphis customer.exe.config file from the v2.6 folder



and replace the v3.0 amphis customer.exe.config file



to point PC1 back to the customer database on the server (which is now the upgraded v3.0 version)

run Amphis Customer on PC1. go to Help->Help About and check it is version v3.0.

(now Amphis Customer should be pointing back to the server again)

click Search and check you can see a list of customers.

check you can view notes, invoices and receipts etc when running Amphis Customer v3.0 on PC1

#### **phase 4**

now we will upgrade the software on PC2

install Amphis Customer v3.0 on PC2

run Amphis Customer on PC2

choose Yes to upgrade and click OK etc as before

(it will initially be pointing to the local customer database which may be empty so do not worry that the upgrade may say there were 0 customers upgraded)

close Amphis Customer

then copy the .config file from v2.6 to v3.0 to point PC2 at the server again.

run Amphis Customer on PC2 - check in Help->Help about that you are using v3.0

check you can see a list of customers and you can access invoices etc.

#### **phase 5**

repeat phase 4 for the other client PCs

#### **phase 6**

once all the client PCs are up and running, click on the **Get License String** button from each client to send us the new v3.0 serial numbers and we will return the license strings.