

AMPHIS SOFTWARE

How to move Amphis Customer to a new PC

These instructions are for moving your Amphis Customer installation to a new PC.

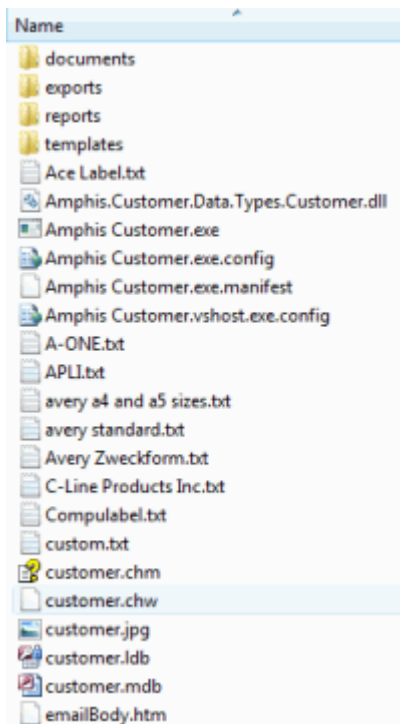
(For example if you buy a new laptop and want to use Amphis Customer on the new laptop instead of your old PC)

Important: If you want to also upgrade to a newer version of Amphis Customer on your new PC, it is essential that you first install your current version on the new PC so that you can upgrade your existing data to the new version.

We'll call your old PC "PC1" and the new PC "PC2"

Step 1

Ensure you have a backup of the customer database (customer.mdb), templates and documents, reports and exports folders on PC1. Go to **Tools->Folders->View Data Folder** and make a backup of everything in that folder and the subfolders.



If you have moved the database or document and templates or reports and exports to different folders, ensure you have a backup of the files from their new locations. (if you are using a version that doesn't have the **Tools->Folders->View Data Folder** menu, see notes at the end of this document)

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Step 2

Install the same version of Amphis Customer on PC2 that you are currently using on PC1. If you still have the .msi file you used to install Amphis Customer on PC1, use that same .msi file to install Amphis Customer on PC2. **It is essential that you first install on PC2 the current version you are using on PC1 and get that up and running before you perform any upgrade to a newer version.**

If you don't have the original .msi file, go to **Help->Help About** to check what version you are currently using on PC1. If you are using Amphis Customer v2.6 then you can download that version using this link :-

www.amphis-software.com/customer/download/amphiscustomer267.msi

If you are using Amphis Customer v3.0 on PC1, go to the Amphis Customer homepage

www.amphis-software.com

and check that v3.0 is still the latest version. if it is, you can click the Download 30 day trial link to download it from there. If the latest version is no longer v3.0, go to

www.amphis-software.com/support/customer/customer.htm#versions

to see a list of versions you can download.

If you are using v2.5 or an earlier version, see notes at the end of this document.

Step 3

On PC2, run Amphis Customer. This will initially be a trial version so it will tell you that there are 30 days left. Enter your business name and sales tax details. On Setup page 3, be careful to select the same customer Id format that you are using on PC1 eg pre-generated numbers or with a prefix etc. On PC1, go to Options->Setup page 3 and check this setting on PC1 and be sure to select the same option on PC2. (Don't change anything on PC1, just click Next,Next,Next, OK)

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Amphis Customer - Set Up - 3 of 4

Set Up Information (page 3 of 4) - Customer Ids

(you can change this information at any time by selecting the Options->Setup menu option)

You can choose the format to use for customer Ids. You can use a pre-generated number starting at the number you specify, you can specify a prefix to add to the number, or you can generate customer Ids based on the company name or last name entered. You can also just enter any customer Id you like eg for existing customer records you are adding to the database.

Customer Id Format

Use pre-generated numbers. The next Customer Id number to use is : 100500

Use pre-generated numbers as above but add this prefix to the start of each Id :

Generate the Customer Id based on the company name entered (or last name if there is no company name)

Use the first 2 3 4 5 6 characters of the company name (or last name)

and use 2 3 4 5 6 digits for the number.

So for a new customer "Space Trading" the Customer Id would be : 100500

Previous Next Help

On PC2 in Setup page 4, just click OK.

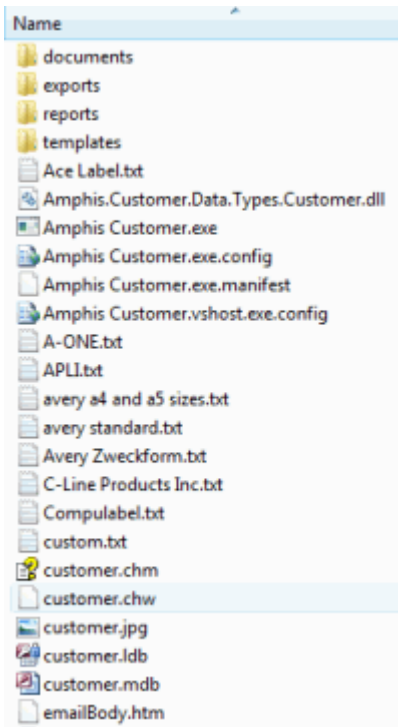
Step 4

On PC1 go to **Tools->Folders->View Data Folder**. we'll call this the "PC1 Data Folder". On PC2 go to **Tools->Folders->View Data Folder**. we'll call this the "PC2 Data Folder". Now copy everything from PC1 Data Folder to PC2 Data Folder. We suggest you first delete everything in the PC2 Data Folder, then copy everything from the PC1 Data Folder to the PC2 Data Folder.

Step 5

On PC2 go to **Tools->Folders->View Data Folder** and it should look like this

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If you had moved the database or documents/templates/reports/exports

If you had moved the database (customer.mdb) or the documents/templates/reports/exports to a different folder on PC1 (and edited the amphis customer.exe.config file to match), you will need to copy those folders from PC1 to the same folder on PC2 and also copy the amphis customer.exe.config file you edited on PC1 and copy it to PC2 (c:/program files/amphis software/amphis customer vX.Y) eg amphis customer v2.6. If your PC is 64-bit then the location will be c:/program files (x86)/amphis software/amphis customer vX.Y

If the folders you were using on PC1 don't exist on PC2, maybe because it has a different operating system, you may need to move the folders to a different location on PC2 and update the .config file on PC2 to match.

If you store the database and folders on a server, you can just copy the .config file from PC1 to PC2. If you plan to upgrade to a newer version on your new PC, you will need to copy the database and folders back to the default location in order to perform the upgrade or else the Upgrade will not detect the earlier version to upgrade from.

Step 6

Run Amphis Customer on PC2 and click Search, check that you see all your customers listed. Go to the Customer History tab for a customer and check you can see their customer history. Click View Attached File and check you can view existing invoices, quotes, customer letters etc.

(if you cannot see your customers or you get an error message, go to the PC2 Data Folder, delete everything and then perform the copy from PC1 Data Folder again).

Step 7

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Click the **Get License String** menu or button to send your serial number to Amphis Software and we will return a license string to fully license the software on your new PC.

Once you are fully licensed, check you can create new customer records and create quotes, invoices etc.

Upgrade Amphis Customer to a new version

If you are also going to upgrade Amphis Customer to a new version on your new PC, we recommend that you use the existing version of Amphis Customer on your new PC for a few days first to check that it is fully up and running ok with all the files successfully copied across.

To upgrade Amphis Customer to a new version, please go to

www.amphis-software.com/upgrade.htm

and follow the instructions there.

Amphis Software Community Forums

Also, why not visit the Amphis Software Forums

<http://amphisforum.websitetoolbox.com/>

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If you are using a version earlier than Amphis Customer v2.6

If you are using v2.5, you can download the .msi file from here

<http://www.amphis-software.com/customer/download/amphiscustomer253.msi>

If you do not have the menu **Tools->Folders->View Data Folder**, go to **Tools->Folders->View Documents Folder** instead and then go up a folder from there. You should see the templates/document/reports/exports folders.