Move Smallbiz from one PC to another
for Advantage Club members

This document is intended to assist you to transfer Smallbiz from one computer to another

Important notes:

The initial loading/setup of Smallbiz is often included in the initial purchase price. Loading/transferring of Smallbiz onto other machines IS NOT included (nor priced into) annual/monthly support costs.

Smallbiz support is not intended to assist computer novices to transfer an operational copy of Smallbiz from one computer to another. However, these instructions should be sufficient for a computer literate person to do so. Assistance, other than the instructions detailed in this procedure sheet is chargeable.

Provision of security codes is provided free of charge to members of the Advantage Club. If you are not a member, then there will be a nominal administrative charge to provide & validate entitlement to these codes.

For a minimal fee (for advantage club members), Smallbiz support can reload your program and data onto a new machine; or you (or your technical people) could use these instructions to do it yourselves. We have often found that the Smallbiz charges to do this, are substantially less than that of a local computer person (who is often not familiar with Smallbiz)

For network and cloud access systems, setup needs to be done by Smallbiz support. Please call to arrange.

If you are not a member of the advantage club (and entitled to the latest program) we cannot guarantee that older versions of Smallbiz can be loaded onto the latest operating systems.

Smallbiz for Windows
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What you will need

- You should have a System CD dated after 1/1/15 (or downloaded version)
  More details given in the "Smallbiz Software Setup Proceedure" document mentioned below

On the NEW computer

- Load a blank instance of smallbiz onto the new computer.

  Please see the "Smallbiz Software Setup Proceedure" document . This is available from the Smallbiz website, under the support tab.

- Once the installation has finished, test all is OK before proceeding. Please click on the smallbiz icon and ensure that smallbiz starts... Please be aware that there is NO salon data in this version, and no passwords. Also be aware that you will be prompted to register (see ***), you can delay this by just clicking cancel.

- Ensure the date of the Smallbiz program on the new machine is AT LEAST equal to or newer than the program date of the old computer !! This can be seen by going to MENU | ABOUT | SYSTEM INFORMATON.   Note the version DATE in both instances. If necessary update the new computer to a program date the same or newer than the old machine BEFORE proceeding. Please see notes 4 below for more details.

On the OLD computer

- On the OLD computer, open your existing Smallbiz program and do a clean backup
  .ie create a NEW backup file on your backup device.
    - In fact we would recommend doing a second CLEAN backup on a separate device as well !!.
    - to access backup go to MENU | SERVICE | BACKUP/RESTORE | BACKUP. Browse to your select your backup device/location & give a **new** backup file name. Select start backup.
    - When complete, we would strongly recommend you verify the backup when requested.

On the NEW computer

- Open Smallbiz and go to Menu | About System Info. Please WRITE DOWN the "Registered Company" name
- You are now ready to restore your data.
    - Select Menu | Service | Backup/Restore |RESTORE.
    - Insert your backup device. Now click "Browse" to locate your USB stick & Backup file.   Click Restore
    - You will be prompted to enter "Business name", you can now type the business name you wrote down in step 1 … EXACTLY ….it is case sensitive.
    - Follow the prompts until complete.
    - Exit from Smallbiz completely.

- Restart Smallbiz.
- You will be prompted for registration at this point (see ***).
    - Selecting "Cancel" as done previously will not work in this situation, as Smallbiz knows it is not a blank system (you just loaded your data !).
    - At this point you can call Smallbiz support for the security codes or
    - Or follow the instructions on screen to check the emergency 4 day bypass, then click "cancel". This will give you 4 days to get the security codes, and is intended for situations where Smallbiz support is not available (after hours/ long weekends etc). Don't forget to do this asap
- Now check your data is correct. It is strongly suggested you do this immediately as many cascading problems can occur if you do not have upto date information.
  Please check on the new computer:
    - Latest day report
    - A client that was recently added
    - An appointment that was made "just prior" to transferring data from the old system
- From this point DO NOT use the OLD computer
- To avoid some staff incorrectly putting information into the old computer (whilst others use the new computer) we would strongly recommend turning it off, or better still physically removing it.

*** Please note that before we can issue new security codes, we need a De Register code from you OLD computer. Get this by going to MENU | About | System info and clicking on the de register button. You must record the number given & supply it Smallbiz Support when registering your new computer.

Notes:

- 1. The Smallbiz system has security that is specific to this installation disk (or in particular to this registered user). Trying to use one installation disk with someone else's data will cause major problems. This also applies to previous demo-disk use. You will need to call smallbiz if this is the case.

- 2. In general it is NOT a good idea to copy files manually from Old to New computer, and then trying to load the System Disk over the top on the New Computer.

- 3. Often attempting to copy database files manually will result in errors. Please use the back & restore sequence. The MySQL database is run as a service, copying the DB files while the service is running often causes errors/ incorrect operation /corruptions that sometimes do not become evident immediately.

- 4. Be careful of situations where … The system CD is say 2014; however, the client has updated Smallbiz regularly online till say 2017. The data structure is then as of 2017. In this situation load the 2014 System CD onto the new system.. then upgrade it via online methods to the 2017 version THEN restore data from old machine. To update select MENU | SERVICE | INTERNET OPTIONS | GET THE LATEST PROGRAM FROM SMALLBIZ. (See point 5 below)

- 5. Most common problems with upgrading relate to permissions & virus protection. Set the c:\Program Files(x86)\Smallbiz directory to be read/write and security permissions for all users. Exclude the same directory from virus protection. Another common solution is to run the Smallbiz icon "AS ADMINISTRATOR" when upgrading.