The Setup Wizard – Version Import Utility

Our integrated Setup Wizard gives you a one-stop shop for adding the finishing touches to your new system. These settings can be changed at any time as your business needs change. However, the **Version Import** utility should be run immediately if you have a previous version of this Appraisals product.

If you have used any of the versions listed below, the **Version Import** utility will convert and import the data correctly into your new database.

- 1-Step Appraisals v5.3
- basicAppraisals v6.1
- o basicAppraisals v7.1

Refer to the image below when following the steps for using this utility.



Before You Start

Before you run the Version Import you will need to know where your current database is located. Open your current version and refer to the image on the first page to identify the database you will be importing.

Version Import Utility

Click the button called **Setup Wizard** on the Features toolbar at the top of the Main Menu to open it.

🔵 basicA	ppraisals			Release 8.01.9238		×
Preferences	Utilities	Support	Setup Wizard			

Follow Steps 1-5 below to import and convert your previous database.

Use this feature to import data from a previous ve (select from the drop-down list) into this databa	ersion ase.	Report Custom Settings Click the button below to setup Company Information & Report preferences.
No Previous Database	1 -	Report Custom Settings
	2	Security Options See the section called "Security Setup" in the basicAppraisals Installation & Setup Guide for more information. Check if users will be required to enter Login Name and Password
		Enable Security Logins
Click the Browse button to select the database to	import Browse	Check if basicAppraisals being used on a Windows network requiring users to login on their computer, and the user profile should be linked to the Windows login. This will bypass the need for users to login to basicAppraisals.
Start Import	5	User Preferences Setup Backup & Restore Options / Personal Preferences
		Backup Options / User Preferences

This utility will import data from any of the following older versions of our Appraisal systems.

No Previous Database
1-Step Appraisals Version 5.03
basic Appraisals Version 6.01
basic Appraisals Version 7.01

1. Chose the correct version from the drop-down list based on the Version number on your current application.

Match versions on the first three numbers. Example 6.01.8150 = basicAppraisals Version 6.01

- 2. Depending on your version, the list below it shows what data will be imported.
- 3. Click the **Browse** button to select the database from the previous version. If you don't know where it is, open the previous version and look at the path on the Main Menu. In the image on the first page, Version 5.3 shows the current path in the white bar at the top of the form. Versions 6 and 7 display the path at the bottom of the Main Menu.

IMPORTANT: If you're upgrading from Version 5.3 or Version 6.1, the database type may be a Microsoft Access database, with a file extension of **.mdb**. When browsing for the database, change the Type drop-down list on the Open Dialog to **Access Databases (*.mdb)**, which will then show the database in the list of files.

Select A Database		×
← → · · ↑	SampleDB v Ō	Search SampleDB
Organize 🔻 New folder		III 🔹 🕶 🚺 😲
	^ Name	Date modified
📥 OneDrive - Personal	🖻 SampleDB.mdb	08/23/2024 11:37 A
Backups		
Documents		
House	v <	>
File <u>n</u> ame: SampleDB.mdl	• ~	Access Databases (*.mdb) ~ <u>O</u> pen Cancel

 \sim

4. Click **Open** on the Browse dialog to display the name in the field:

1	Version Import Utility
	Use this feature to import data from a previous version (select from the drop-down list) into this database.
	basic Appraisals Version 6.01
	Data Will Be Imported From >> To:
	Contacts >> Contacts Contact Notes >> Contact Notes Appraisals >> Appraisals Appraisal Items >> Appraisal Items System Notes >> System_Notes System Attachments >> System_Attachments
	Click the Browse button to select the database to impo
	C:\Users\LaNette\Documents\1-Step Appraisals

C:\Users\LaNette\E	C:\Users\LaNette\Documents\1-Step Appraisals				
v5\SampleDB\Sam	v5\SampleDB\SampleDB.mdb				
	Start Import				

5. Click the **Start Import** button to import the data. This only takes a minute or so to run, depending on the amount of data in the old database.

When this is finished, you can close the Setup Wizard, then open Contacts and Appraisals to review your data.

What's Next?

Visit our website at <u>https://basicAppraisals.com</u> for additional User Guides and Video Tutorials. You can now uninstall your previous version which is no longer supported.