



Compact Software
financial control for your business

WinAccs WinPay WinStock

Installation guide

For upgrades to v6.35 & above

Upgrade installation guide

BEFORE INSTALLING THIS UPGRADE, PLEASE READ ALL THESE NOTES: -

IT IS IMPERATIVE that you have a restorable backup of **ALL** company data. It is essential that you make this backup outside your normal run of backups and keep it in a safe place. Regular backups should always be saved off-site, i.e. away from your PC or network server, so that they can be restored in the event of fire or theft.

Autobackups

In the last release, we introduced a procedure for processing an autobackup of your working data on a regular basis. For WinAccs users, this has been extended to process an autobackup immediately prior to processing a Period End, and for all users, immediately prior to an upgrade of data due to a new release or Service Pack. Whilst this might suggest it is unnecessary to take a further backup, we still recommend that data is secured off-site as stated above.

Reserved Company Numbers

Please be aware that in both WinAccs and WinPay, **company numbers 995 to 999 ARE RESERVED** for demonstration data and blank company templates, and will be **OVERWRITTEN** by this upgrade. Therefore if you use any of these numbers for live data, use the Copy Company facility to move these companies to numbers lower than 995 prior to installing this upgrade.

Upgrade from older versions

You should not upgrade directly to v6.35 or above if you are currently using a version older than 6.31. You **MUST** install interim upgrades. Please call our Support Team if you require assistance.

******WINACCS INSTALLATION WIZARD******

This upgrade uses our own WinAccs Installation Wizard, and will not remove any LIVE data, nor invalidate your registration. However, we do recommend that you undertake this installation at a time when our Support Team are available to assist you should it be necessary (Monday to Friday, 9.00am to 5.00pm, excluding Bank Holidays). Please note that the months of March, April and May are especially busy for our Support Team.

If you wish to book a visit for your installation to be carried out by a member of our Support Team, please ring and ask for the Compact Software Sales Desk. This is a chargeable service, although preferential rates do apply.

INSTALLATION PROCEDURE: -

The installation procedure described here assumes that you have already installed v6.31 or above, which has previously been distributed to you.

IF YOU ARE USING A VERSION PRIOR TO v6.31, WE RECOMMEND YOU NOW UPGRADE TO AN INTERIM RELEASE, REFERRING TO THE UPGRADE PROCEDURE WHICH ACCOMPANIED THAT RELEASE

N.B. WinPay users are advised to install this CD only after advancing the period and before data entry in WinPay.

Local Administrator Rights

Whichever version of Windows you are using, it is important that you have **Local Administrator Rights** on your PC when using WinAccs/WinPay. Please also note there can be performance-related issues when using Windows Vista and Windows 7, but only when posting transactions to WinAccs.

Upgrading an existing installation

Please ensure that your currently installed release is v6.31 or above (it does not matter which Service Pack is currently installed). If you are not sure which version of WinAccs/WinPay is currently installed, log in to the system with your user name and password, and in the bottom left corner of the screen the current version is displayed, e.g. v6.34 SP13.

An upgrade may be performed by using the CD issued by Compact Software, or by downloading the full release from our website, www.compact-software.co.uk. Use the checklist below to ensure you install your upgrade correctly.

Single-user systems

- Ensure you have a restorable backup of all live company data, for both WinAccs and WinPay.
- Close all applications on your pc (as you may be asked to restart your pc on completion of the install).
- Begin the upgrade
 - If you have a v6.35 CD, place it in your CD drive. The WinAccs Installation Wizard should auto-load and will lead you through the installation process. If it does not auto-load, select Start/Run and search for Setup.exe in the root folder of the CD, and double-click.
 - If you have downloaded v6.35 from our website then simply run **Compact635.exe** from where it is saved.
- Once the contents have been extracted, the WinAccs Installation Wizard will guide you through the rest of the installation.
- On completion of the Setup procedure, restart your PC if recommended to do so.
- Login to WinAccs/WinPay as the system administrator (BOSS/PASS or your own master username and password).
 - If you have an internet connection, the system will automatically check the Compact Software website for the latest Service Pack. If you are not sure if the update has taken place, go to **Help** and **Check for Updates** to apply the latest Service Pack.
 - If you do not have access to the internet, or the latest Service Pack, please contact our Support Team who will arrange for this to be sent to you.
 - Go to **System Admin** and **Assign User Rights** to ensure that all users have the correct access to the menu system, and to the Central Spooler system.
- Your system is ready for use.

Multi-user systems

WinAccs/WinPay may be installed from any workstation attached to a network. It is not necessary to install on the server first, and if you are not using the server as a workstation, **it is not necessary to install on the server at all.**

All workstations which use WinAccs/WinPay must be upgraded before continuing normal use.

- Ensure you have a restorable backup of all live company data, for both WinAccs and WinPay.
- Close all applications on your pc (as you will be recommended to restart your pc on completion of the install).
- Begin the upgrade
 - If you have a v6.35 CD then place it in your CD drive. The WinAccs Installation Wizard should auto-load and will lead you through the installation process. If it does not auto-load, select Start/Run and search for Setup.exe in the root folder of the CD, and double-click.
 - If you have downloaded v6.35 from our website then simply run **Compact635.exe** from where it is saved.
 - If you are installing a 2nd or subsequent workstation, you can browse to a folder under the main Data folder called CSetup. Search for Setup.exe, and double-click.
- Once the contents have been extracted, the WinAccs Installation Wizard will guide you through the rest of the installation.
- On completion of the Setup procedure, restart your PC if recommended to do so.
- Login to WinAccs/WinPay as the system administrator (BOSS/PASS or your own master username and password).
 - If you have an internet connection, the system will automatically check the Compact Software website for the latest Service Pack. If you are not sure if the update has taken place, go to **Help** and **Check for Updates** to apply the latest Service Pack.

- If you do not have access to the internet, or the latest Service Pack, please contact our Support Team who will arrange for this to be sent to you.
 - Go to **System Admin** and **Assign User Rights** to ensure that all users have the correct access to the menu system, and to the Central Spooler system.
- Repeat the steps from **Close all applications, etc.** to **On completion of the Setup procedure, Restart your PC** for each workstation on your network.
- Your system is ready for use.

Installing a Service Pack

Once WinAccs/WinPay has been installed on your system, Compact Software may from time-to-time distribute further updates or improvements via a Service Pack. Installation of a Service Pack is very straightforward.

You may be notified of the availability of a Service Pack by one of the following methods:

- If Auto-Update has been ticked (on the top toolbar, select Help, and in the 3rd section), each day you log in to WinAccs (or WinPay), your system will visit the Compact Software website and check if any new updates have been posted.
- If in the Help section, you select Check for Updates, your system will visit the Compact Software website and check if any new updates have been posted.
- You are advised by Compact Software Support Team.

Upon finding that a Service Pack is available:

- You may download this from the website (or if you do not have internet access on any PC on your WinAccs system, we will send this to you).
- The Download dialogue may prompt you to Run or Save the download file. You should Run this immediately if the option is given. Otherwise, save the file to a known location (i.e. somewhere on your hard disk or network) and run it from there.
- On completion of the download, a window will open with a button labelled Setup, simply click this button.
- If you have been sent the Service Pack on a CD or email, when you wish to install the Service Pack, simply click on the filename from its location, for example 635SP1.exe. A window will open with a button labelled Setup, simply click this button.
- On completion, you will be informed that the Service Pack has been installed successfully.

After installation of the Service Pack, when you next log into WinAccs/WinPay, the Service Pack will be found and installation completed. On a multi-user system, this process will be repeated for each user pc when they log into WinAccs/WinPay.