



Instructions for Windows OS users

How to update from an old version of MagicBase Pro to a newer one:

STEP ONE: VERIFY THE EXPORTS FOLDER

You should have a folder in the root directory of the older MBP called 'EXPORTS'. If it's not there, just create one named 'EXPORTS'. (It will be there unless you deleted it.)

Note: Find the root folder of MagicBase Pro by choosing 'My Computer' and opening the 'C:' drive (or the main drive where you keep your programs) and then opening the 'Program Files' folder. There will be a folder called 'MagicBasePro 3.x'.

STEP TWO: EXPORT

Start the old MBP and, from the File menu, choose 'Export for newer MBP update'. This button is also found on the Prefs Screen. When the export is complete, quit the old MBP.

All of your data will be copied into the 'EXPORTS' folder in the main folder of MagicBase Pro. This will not erase, delete or remove your old data. It will just make copies of it in the EXPORTS folder.

STEP THREE: PROTECT YOUR DATA

CAUTION! Always make a back-up copy of your old MBP just to be safe.

Method 1:

To keep your data safe, open your Program Files folder by choosing 'My Computer' and opening the 'C:' drive, (or the main drive where your applications are.)

Copy and paste the entire OLD MagicBasePro folder to you desktop, and rename it.

Method 2:

To keep your data safe, you could just open your Program Files folder by choosing 'My Computer' and opening the main drive where your applications are and then RENAME the 'MagicBasePro' folder to 'Old MBP'

STEP FOUR: INSTALL THE NEW MBP



When you click on the 'Get Update' button, a file called 'MagicBasePro3_Install.exe' will be downloaded.

(You may need to right-click and choose 'Save as' to select your desktop.)

Double-click to begin the installation process and follow the instructions to install the new MBP. It will be installed in the Program Files folder unless you choose another location. The last screen of the update will allow you to start the program. Click to start it.

You will have to enter your Legal Name. Enter the same name that you did when you first installed MBP. You may skip the Serial #, if you don't have it. MBP will attempt to generate an email, unless you choose to skip that part. Then you may enter the Authorization Code, without waiting for the response email, from MBP HQ, if you've entered your legal name the same as before.

Note: Use ALL CAPS when you type in your Authorization Code.

STEP FIVE: DELETE THE SAMPLE CUSTOMERS

MagicBase Pro demo files (which is what you're uploading) come with sample customers pre-installed in them. Before you import your data, you will want to delete these sample customers. Use the Records menu. There are four options "Delete All Customers", "Delete All Performance Routines", "Delete All Collector Routines", and "Delete All Marketing Campaigns." Select each of these menu items to remove all sample records.

STEP SIX: VERIFY THE IMPORTS FOLDER

You should have a folder in the root directory of the new MBP called 'IMPORTS'. If it's not there, just create one named 'IMPORTS'. (It will be there unless you've deleted it.)

STEP SEVEN: TRANSFER

Copy the contents of the EXPORTS folder of the old MBP to the IMPORTS folder on the newer MBP. (There will be 11 files)

STEP EIGHT: IMPORT

Read the attached instructions 'Things to do BEFORE you import', NOW. Open your new MBP program and, from the File Menu, choose 'Update from an older MB Pro'.

DONE!

It is recommended that you verify that all of your data transferred correctly. You may find that some customized menu choices that you created in your old MBP will not be transferred, so you'll have to re-create them in the new MBP. Specifically, any customized phone labels, and every customized clickable-menu choices on the Shows Screen, will not be transferred.

It is also recommended that you save your old MBP as a back-up until you no longer need it. At that time, you may delete it from your computer.

You will be notified by email whenever a new update is available. You may also check for new updates by selecting, from the File menu, the 'Check for Updates...' option.

Things to do BEFORE you import

- There may be some sample customers in the new MagicBase Pro. Delete them. You can use the menu options under the Records menu to delete all customers, Show Plans, and Routines.
- Go to the Prefs Screen, on the Auto-Fill tab. Anything typed into any of the fields on this screen will be automatically added to any blank fields of any imported records. It is recommended that you delete all the data from these fields before you import, or your data will be changed. Especially be sure that there is no data in any of the financial auto-fill fields.
- You may want to enter your business information on the Business Info tab in Prefs at this time.