

Electronic Service Control

Version 8.1

Client Upgrade Guide

Before You Begin

Thank you for choosing to upgrade to Electronic Service Control (ESC) Version 8. These directions will walk you through the entire upgrade process.

Before you begin it is important to understand that this upgrade only affects the ESC Client. Nothing will need to be done on the server unless, of course, the ESC Client is installed on the server computer as well.

Minimum System Requirements

Before you begin the upgrade you need to collect a bit of information. The first thing to look at is the new minimum system requirements. There are no changes from the Version 8 requirements. Changes from the Version 7 requirements are highlighted in **red**. Please make sure all of your systems meet these minimum requirements before continuing.

Client Requirements

Processor:	Pentium III 500Mhz
Memory:	512MB RAM
Free Hard Drive Space:	500MB
Other Drives:	CD-ROM or DVD-ROM
Networking:	Must be networked using TCP/IP
Operating System:	Windows 2000, XP or Server 2003. Windows 98 & ME are no longer supported.

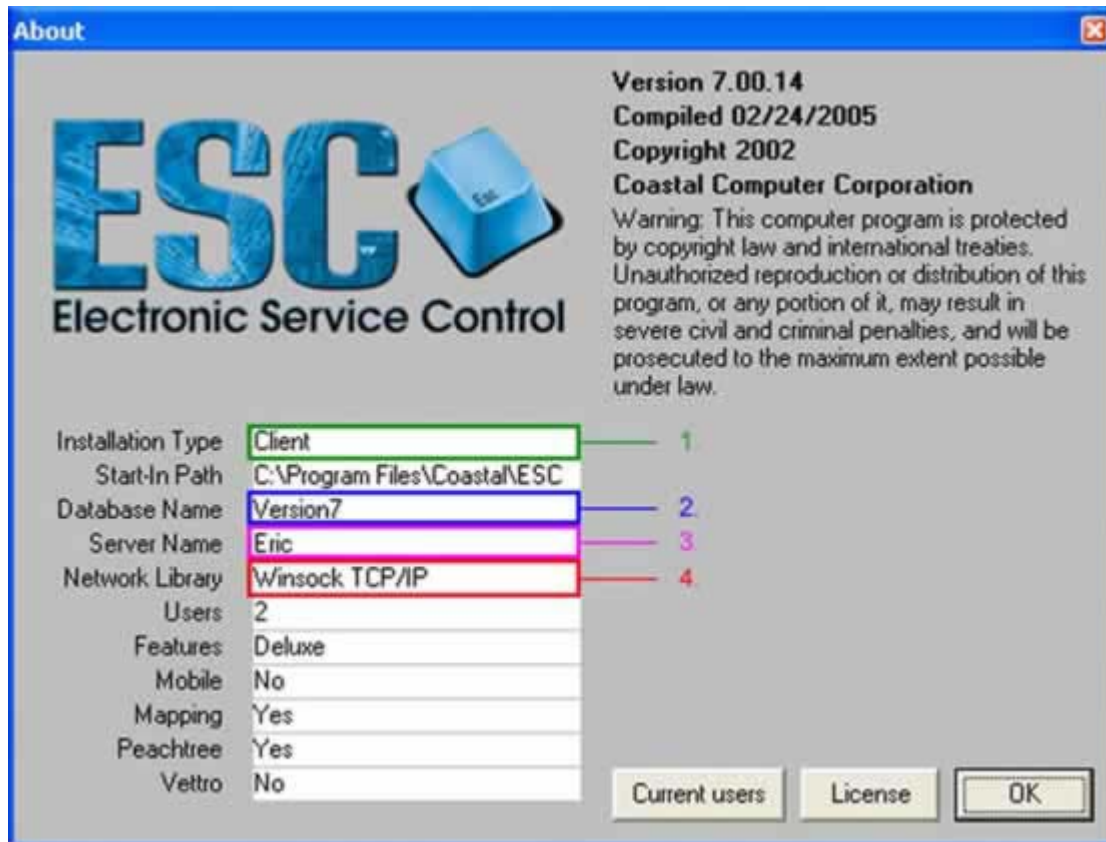
Required Software:	Internet Explorer 6.0 or later and current Virus Protection software
Optional Software:	QuickBooks: If you are integrating with QuickBooks, all QuickBooks installations MUST be at QuickBooks 2003 or higher. ESC integrates with the following QuickBooks products: <i>Pro</i> , <i>Premier</i> , <i>Contractor's Edition</i> , <i>Accountant's Edition</i> and <i>Enterprise Solutions (v2.0 or higher)</i> . Previous versions of QuickBooks (QuickBooks 2002 or lower) and <i>QuickBooks Simple Start</i> and <i>QuickBooks Basic</i> are not compatible with ESC.



Peachtree: If you are integrating with Peachtree, all Peachtree installations MUST be running Peachtree 2006 or 2007 Complete, Premium or Quantum. This version of ESC will NOT work with previous versions of Peachtree.

Note: In all cases, we recommend that all Windows Critical Updates and Service Packs are applied to every machine.

Now that you have confirmed your system meets the minimum requirements, you just need to write down a few settings before proceeding with the upgrade. Click **Help | About** and write down the information highlighted below.



Installation Type: _____

Database Name: _____

Server Name: _____

Network Library: _____

Important: If the Installation Type shows **Single User**, please download [Single User Guide](#) and follow it instead.

Making a Backup

After you have collected the information necessary for the upgrade, you need to make a backup of your existing data. This can be accomplished by performing the following steps from within any ESC Client.

- 1 Click **File | Backup Your Data**.
- 2 Make sure the **Overwrite existing backup** box is **not** selected then click **Backup**. Should you receive an error during this step, change the path to **C:** and try again.
- 3 Note the file name and path on the following screen when the backup is complete and click **OK**. Copy the file shown in the previous step onto a different computer or back it up to a tape/USB drive/zip disk/CD/DVD/etc. Keep that copy for at least 1 month.

Download New Version

The last step you need to perform before starting the upgrade is to download the new version. This can be achieved by completing the following steps.

- 1 Open your Internet Browser and go to the following site:
<http://www.coastalcomputercorporation.com/html/updates81.html>
- 2 When prompted for a password, enter the word **profit** in all lowercase letters.
- 3 Click the **Download** button on the **ESC - Client** line.



- 4 Click **Save** to copy the program to your computer.
- 5 Note the name of the file and the location where it will be saved in the spaces provided below before clicking **Save** again.

File Name: _____
Location: _____

Uninstall Previous Version

You are now ready to uninstall the previous version of ESC. This is a necessary step. It is completely safe and will not affect your data in any way.

- 1 Exit all programs on the computer.
- 2 Click **Start | Control Panel**.
- 3 Select **Add or Remove Programs** from the resulting list.

Highlight **Electronic Service Control** from the list of available programs and click **Remove**. Select **Yes** to uninstall the software.

Install Version 8.1

Now that ESC no longer exists on the computer, you can install Version 8.1. Follow these steps on EVERY computer that you would like ESC installed on.

- 1 Exit all programs on the computer.
- 2 Locate and double-click the file you wrote down above.
- 3 Click the **Next** button to begin the installation.
- 4 Read the license agreement and agree to the terms before clicking the **Next** button.
- 5 Enter your **User Name** and **Company** information before clicking the **Next** button. Be sure to leave the installation options set to **Anyone who uses this computer**.
- 6 Unless you initially changed the installation directory when you first installed ESC, simply click **Next** to accept our default directory. If ESC was previously installed to a different location, click the **Change** button to set the path to the same location.
- 7 Click **Install** to begin the installation.
- 8 When the **Finish** button appears, make sure the **Launch the program** box is **UN**checked, then click it.

Do not start ESC again until all the clients have been updated. Then proceed to the following section.

Upgrading The Database

After installing ESC Version 8.1 on all desired workstations, the previous database needs to be converted to support the new features. This procedure should only be performed on one ESC Client (the exact computer does not matter).

- 1 Click **Start | All Programs | Electronic Service Control | ESC** to launch the program. This should open ESC but will not open your last company.
- 2 Click **File | Open Company**.
- 3 Use the information you collected earlier in the upgrade procedure to fill out the resulting screen. Make sure you logon using the **Admin** account and the corresponding password.

At this point the data should start converting. If you are converting from Version 8, this should take less than 15 minutes. If you are converting from Version 7, the entire process should take between 0 - 50 minutes depending on the size of your database. If you are converting from an earlier version of the software, please allow several hours for the conversion to take place.

Getting Everyone Working Again

Once the conversion is complete, everyone can logon to ESC again. Everyone should use their own logon name and password, if they have been previously assigned, instead of the Admin account.

Additional Components

Once you have successfully upgraded ESC to Version 8.1 and converted your database *it is essential* the following components of the ESC software be upgraded **if** you were running Version 7 or earlier and they are currently installed:

- **ESC Peachtree Server** -Note that this also requires the installation of Peachtree 2006 or 2007.

Checking it Out

Now that you have successfully completed the upgrade, see the What's New in Version 8.1 help topic (**Help | Help Topics | Welcome to Version 8.1 | What's New in Version 8.1**) for details on everything that has changed.