# Moving ClientConnect to a new computer

1. On your **new** computer, install ClientConnect from the link supplied to you in an email (or from the ClientConnect download link on our website).

2. In this **'new'** ClientConnect, activate a licence and create a LIVE database. For more details, refer to the document 'Initial set up of ClientConnect' which will also have been attached to the email.

3. On your **old** computer, take a backup of your ClientConnect database, either to a memory stick or to our online server.

    a. 'File Menu' > 'Database Administration' > 'Backup/Restore Database' > 'Backup Data' and then decide the location where you want to backup.

    b. Note that you will also need to manually backup other items such as Client Documents, Photos etc if you want to bring these across too. Refer to Appendix A for details.

4. On your **new** computer, open up ClientConnect. You should be in the LIVE database (check the bottom left of the screen). If, for any reason, you are not, go to step 9 – swapping databases.
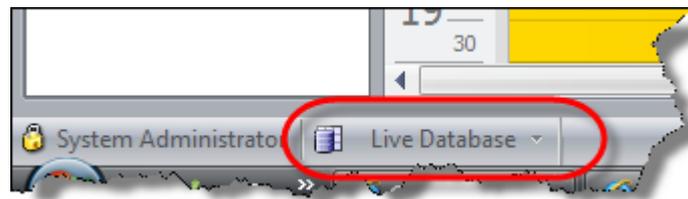

5. You can now do a restore of your backed up database into your LIVE database (new computer).

    a. 'File Menu' > 'Database Administration' > 'Backup/Restore Database' > 'Restore Previous Backup' and select where you want to restore from (memory stick or online server).

6. Open ClientConnect and ensure that your data all looks satisfactory.

7. The ClientConnect licence on your old computer will eventually expire so there are no other requirements to be performed!

8. NOW SEE APPENDIX A BELOW

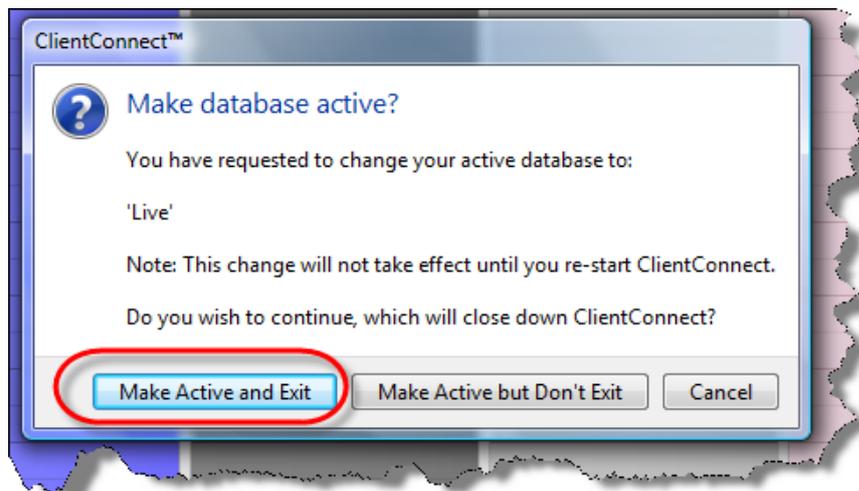9. Swapping Databases (only if you are NOT already in 'Live').

    a. Click on the arrow circled below.
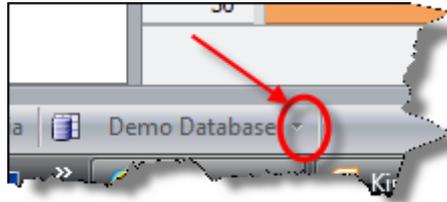
    b. In the drop down list, all of your databases will be listed and the active one will be ticked.
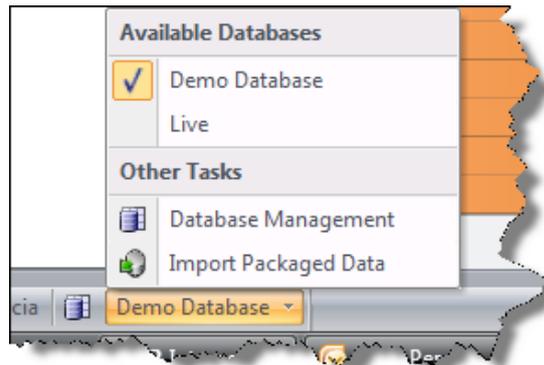
    c. Tick the 'Live' database. You will need to make it active and exit.

    d. Reopen ClientConnect and you should have the Live database as the active one.

    e. Go back to step 5 and continue.

Appendix A

Direct Debit billing

If you are using billing integration with the direct debit company, go to File > Control Panel > Instalments and scroll down to 'Billing Method'. Select your billing provider and enter the relevant details. These details are not moved across when copying a database purely for security reasons. Only you should have access to those details.

SPBilling

Please contact us to check whether you require the 'pipe' delimiter in your ABA file.

Client Photos and Documents Folder

On each computer that runs ClientConnect, the default location for these items is C:\My documents\ClientConnect Files\Databases\{*your DB name*}.....there are 4 folders which default to the local drive.
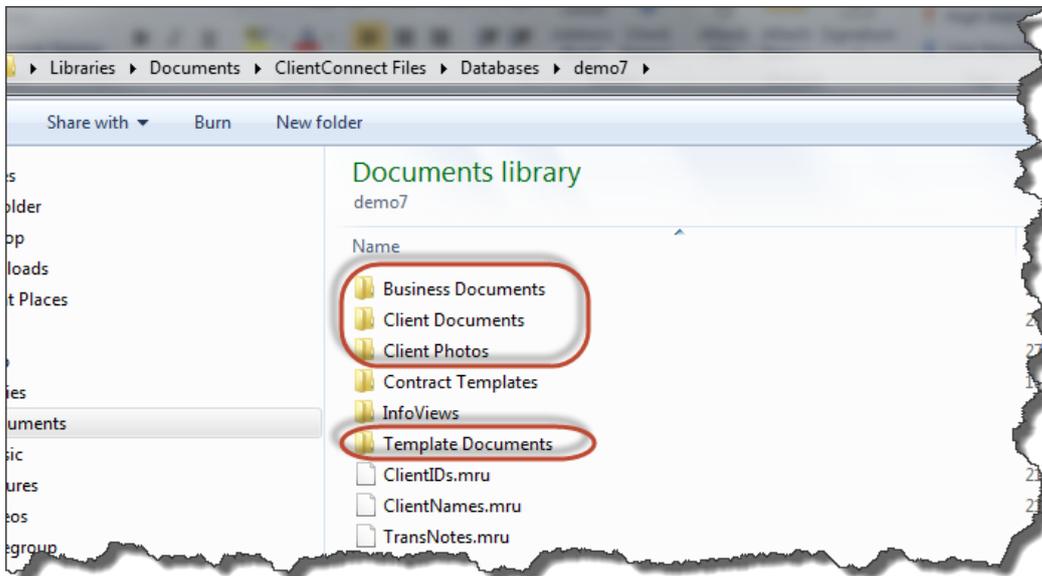
So on each machine, if you attach a photo to a client, it will be stored in the 'Client Photos' folder on that machine.

If you want all these items stored on a central computer, you can change the default locations.

In ClientConnect, go to File Menu > Printing & Documents > Document Management Options. These are the folder locations you can change so that on each machine they are all pointing to the same place.
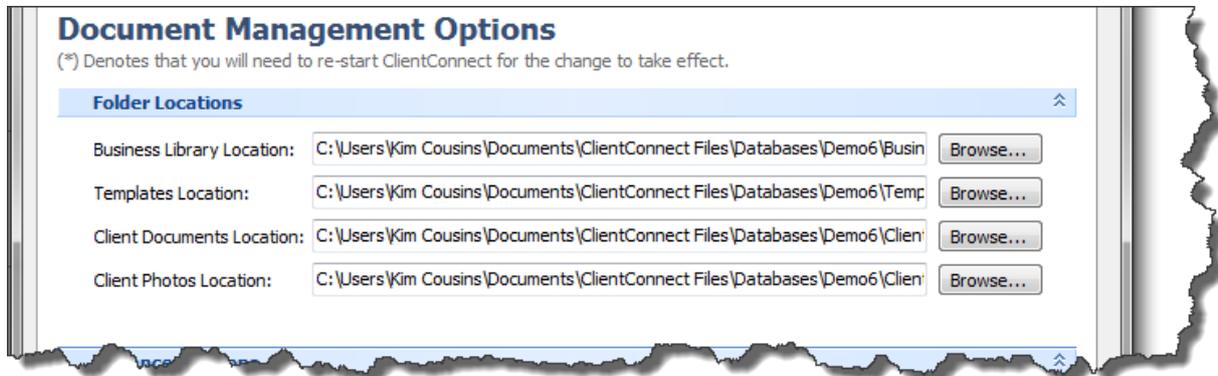
Find out the location of your Documents and Photos and copy them over to the new machine as well.

Whatever location you choose to store these should be defined in the 'Folder Options' above.

Last modified: Aug 2014