



Church Helpmate™ 2004 - Upgrade Startup Guide

Helpmate Technology Solutions, LLC
PO Box 619, Union, KY 41091
www.helpmate.net

**PLEASE READ THIS DOCUMENT IN ITS ENTIRETY BEFORE INSTALLING & RUNNING
CHURCH HELPMATE™ 2004**

Welcome to the Church Helpmate™ 2004 upgrade. We are confident that this new version of Church Helpmate™ will enable you and your organization to “do more, in less time, and with less effort...than ever before”. This version upgrade, which is a result of months of development and testing, was birthed out of feedback and suggestions from Church Helpmate™ customers like yourself – those who are on the “front line” of Kingdom work. Thanks to all who have helped us “raise the bar” once again in the church management software industry. We sincerely hope you enjoy and have fun with your new software!!

This “*Upgrade Startup Guide*” was designed to help get you up and running on Church Helpmate™ 2004 as quickly and painlessly as possible. It includes installation assistance, instructions on converting your previous version’s data, and information on the exciting new features and enhancements now available to you.

The upgrade process basically consists of 3 parts:

- (1) Installing the Church Helpmate™ 2004 program
- (2) Entry of User Name & Registration Code
- (3) Running the Church Helpmate™ 2004 “*Upgrade Utility*” to bring your previous version’s data into CH2004.

(1) INSTALLATION

In order to use the new Church Helpmate™ 2004 product, it must first be installed onto your computer - and on any other computer from which you (or others) will want to run the program. Typically, you will want to install Church Helpmate™ 2004 on any computer currently running a previous version of Church Helpmate™. When installing Church Helpmate™ 2004 on a computer that has a previous version already installed, the Church Helpmate™ 2004 installation will not affect your previous version in any way. Eventually, after you have completed the entire upgrade process described by this document, you will want to uninstall your previous version from each computer.

Minimum System Requirements - In order to install Church Helpmate™ 2004 onto your computer, it must meet or exceed the following minimum system requirements:

- Windows 98 or newer Windows operating system
- Pentium 133MHz processor
- 64MB RAM
- 200MB free disk space
- Super VGA display adapter running 800x600 resolution

Recommended System Requirements - To ensure the most efficient operation and best user experience, it is recommended (but not necessary) that your computer meet or exceed the following “recommended” system requirements:

- Windows XP
- Pentium III 500MHz processor
- 256MB RAM

Installation - Installing Church Helpmate™ 2004 is a quick and simple process:

1. Close any programs you currently have running and disable your antivirus software.
2. Insert the Church Helpmate™ 2004 CD into your computer's CD drive.
3. After several seconds, the installation program should begin automatically.
NOTE: If the installation program does not start automatically, follow the steps below:
 - Click the Windows "Start" button, then select "Run"
 - On the "Open" line, type: x:\CH2004Setup.EXE (where "x" represents the letter of your CD drive)
 - Click the OK button
4. Follow the on-screen instructions to proceed with the installation process.
5. At the final completion screen, you will have the option to "View the ReadMe file". You are encouraged to read the "ReadMe" file as it contains additional information regarding the product and late-breaking details that may not have been included in this startup guide or in the product's User's Manual.

NOTE: During the installation of Church Helpmate™ 2004, your current version of Microsoft Internet Explorer will be checked. If your current version is older than version 5.50.4134, IE will be automatically upgraded to version 6.0 during the installation of Church Helpmate™ 2004. You may also be asked to reboot your machine one or more times during the installation.

After installing Church Helpmate™ 2004, you will notice a new CH2004 icon on your Windows Desktop. This icon will be your typical method for starting the Church Helpmate™ 2004 program. A "Church Helpmate 2004" program group will also have been created for you under the Windows "START" button as shown below:

"START" button | All Programs (or Programs) | Church Helpmate 2004

Within this CH2004 program group, you will find several additional items related to CH2004 such as utilities and documentation.

(2) USER NAME & REGISTRATION CODE ENTRY

Initially after installing CH2004, it will operate in "Demo" mode. Upon program startup while in Demo mode, you will be presented with an initial startup screen that will include a button labeled "**Enter User Name & Registration Code**". You will want to click this button and then enter the User Name & Registration Code provided to you on your CH2004 CD's jewel case. After successful entry of your User Name & Registration Code, the Demo mode of operation will be terminated. You will need to perform this entry of your User Name & Registration Code on each machine running CH2004.

IMPORTANT NOTE: After installation, the Church Helpmate™ 2004 program will initially use a sample data set. In order for Church Helpmate™ 2004 to be loaded with the data contained in your previous version, you must run the Church Helpmate™ 2004 Upgrade Utility as explained in the following section.

(3) UPGRADE UTILITY

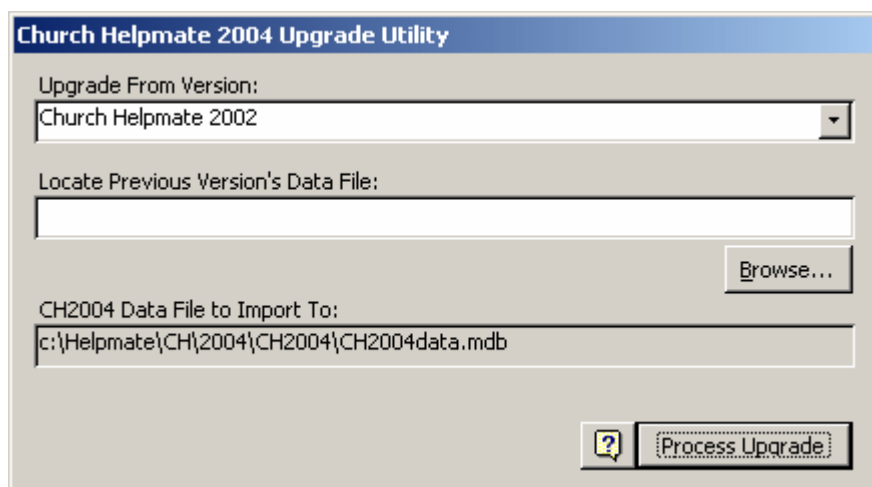
Church Helpmate™ 2004 includes an “*Upgrade Utility*” which you will want to use in order to bring your previous version’s data into CH2004. Until you run the Upgrade Utility, your Church Helpmate™ 2004 software will display only a sample data set. The CH2004 Upgrade Utility will perform the following actions:

1. Create a new (empty) CH2004 data file
2. Import all of the records that currently exist in your previous version’s data file into this new CH2004 data file

The CH2004 Upgrade Utility will not alter the data in your previous version’s data file in any way (it only “reads” the data).

To start the Upgrade Utility, choose “Upgrade Utility” under the Church Helpmate 2004 program group as shown below:

“START” button | All Programs (or Programs) | Church Helpmate 2004 | Utilities | Upgrade Utility



Upon opening the Upgrade Utility, you will need to supply 2 pieces of information:

1. The name of the previous version you are upgrading from (for example, “Church Helpmate 2002”)
2. The location of the previous version’s data file (use the “Browse” button to assist with this)

Once you have provided these items, use the “Process Upgrade” button to begin the process. The length of time required to complete this process will vary depending on several factors such as number of records in your previous version’s data file, speed of your computer, etc. Processing time can range anywhere from several minutes to several hours. **During the upgrade process, it is strongly recommended that no other work be performed on the computer. The upgrade process is a very disk intensive function and, although the Upgrade Utility may appear to be unresponsive if you switch tasks on the computer after you have begun the upgrade process, it would be very rare for the process to actually be locked-up. If errors are encountered, they will be displayed on the screen.**

IMPORTANT NOTE: If your previous version’s data file is currently located somewhere on your organization’s network (that is, not on your computer’s hard-drive), it is recommended that you make a copy of the data file and place the copy on your computer’s hard-drive. Then run the Upgrade Utility using this local copy of the data file. **Doing so will greatly reduce the processing time** since working with a previous version’s data file through the network is much slower than working directly with a file on your computer’s hard-drive.

IMPORTANT NOTE: In the unlikely event that you receive any error messages during the process, this indicates that some of your previous version's data was not able to be brought into Church Helpmate™ 2004. If this should occur, please:

1. Contact Helpmate Technology Solutions support department (859-384-7323 M-F 9:30a-5p EST or support@helpmate.net) for further assistance. We will work with you to ensure that all of your previous version's data is brought into CH2004. **For those customers not on a support plan, no fees will be charged for this upgrade assistance.**
2. **Continue using your previous version until the Upgrade Utility issue is resolved.**

Upon successful completion, a message will be displayed indicating that the upgrade process has finished. Start the Church Helpmate™ 2004 program to verify that it is now showing your organization's data (imported from the previous version's data file).

OBTAINING TECHNICAL SUPPORT

- **Support Plan Subscribers:** If you are subscribed to either our Gold, Silver, or Bronze support plans, please follow the standard support channel procedures for your plan (as provided to you at the time of your support subscription).
- **Non-support Plan Clients:** If you received the 2004 version upgrade, but are not currently subscribed to a support plan, you are eligible to receive technical support assistance via Email during a 30-day period beginning from the date you received the upgrade. Email inquiries should be sent to **support@helpmate.net**. Phone support is also available, but requires a \$30/incident fee. As noted above, technical support assistance (if needed) to convert your previous version's data into the 2004 version is available at no charge (by phone or email) even after the initial 30-day period expires.

ADDITIONAL NOTES ABOUT THE CHURCH HELPMATE 2004 UPGRADE

- Please refer to the document titled "Church Helpmate™ 2004 – What's New" for a detailed listing of the new features and enhancements now available to you.
- The structure of "Pledge" records has changed dramatically in Church Helpmate™ 2004 to support fiscal year and multi-year pledge tracking. In previous versions, a Pledge record covered 1 calendar year and provided 12 monthly "slots" for the pledge amount for each month. In Church Helpmate™ 2004, Pledge records can cover any timeframe desired, and the pledge amount is entered by the user in terms of a payment amount and payment frequency (i.e. \$100 monthly payment). The 12 monthly pledge amount "slots" no longer exist. As the CH2004 Upgrade Utility imports your previous version's Pledge records, the following will occur:
 - Each pledge record in your previous version's data file will be imported and created as a pledge record in CH2004. If in your previous version you utilized multiple pledge records for your fiscal year or multi-year pledge campaigns, you may wish to work with these pledge records to consolidate them.
For example, if you have a 2003-2004 pledge campaign, you most likely would have entered 2 pledge records in your previous version (1 for year 2003 and another for year 2004). You may wish to modify these multiple pledge records in such a way that a single pledge record covers both 2003 and 2004. To do this, modify the timeframe for the 1st pledge to cover both years and then delete the 2nd pledge.
 - As each previous version's pledge record is imported in CH2004, the "Frequency" field for the CH2004 pledge record is set for "monthly" and the "Payment Amount" field is calculated by taking the total pledge amount and dividing the value by 12 (distributing it evenly throughout the pledge's duration). This logic is necessary since the previous versions did not store "Payment Amount" and "Frequency" parameters.
- The CH2004 data file generated by the Upgrade Utility will be considerably larger in size than your previous version's data file. There are several factors that contribute to this:
 - The CH2004 MS Access® database files have been upgraded to the Access® 2000/2002 file format.
 - The new CH2004 data file merge capability utilizes Microsoft Access' "Replication" technology which adds many extra fields and tables to the data file.
 - The new fields and tables required by the CH2004 new features and enhancements.
- With the new Replication functionality now included in Church Helpmate™ 2004, the Church Helpmate "Work at Home Contributions" module found in Church Helpmate™ 2002 has been discontinued. The Replication functionality now allows users to remotely enter data in any area (module) of the product (not just contribution records).
- For those interested in knowing the technical details on the exact structure modifications to the CH2004 data file from the previous version, we have provided a text file named "CH2004 data file changes.txt" located on the root folder of the Church Helpmate™ 2004 installation CD with this information.