

The following steps do **not** need to be done all at once. In fact, we recommend you do steps 1, 2 and 3 **and** continue to use the DOS program. After you've set up the Windows version; it's running properly **and** you've decided you **do** want to switch to the Windows version, you can follow Step 4 and complete the conversion.

However, before you go to Step 4, be sure you're happy with the Windows program **and** that you understand the differences. 90% of our users are thrilled with the changes but 10% like the familiarity of the DOS program. The Windows program has many new features, but a few of the features in the DOS version are **not yet** available in the Windows program. If they are critical to the way you run your business, you may want to wait until they have been added to the Windows version. Regardless of whether you switch to Windows now or later, you can still import your data into the Windows version **without** affecting your DOS program. We **strongly** recommend you don't use the Windows version, without first **fully** testing it. There are four reasons for this:

- 1. Although the program imports your customers and invoices, it does not convert your preferences and printer settings. You must set these up and get them working, before using the Windows version.**
- 2. The program imports your price lists and employee files, but these files have new options you will need to configure.**
- 3. Your staff may need time to familiarize themselves with the new features.**
- 4. Usually the conversion goes smoothly; however, your DOS files may have corrupted records. They may not be affecting the DOS version but may cause problems when converting to the Windows version. If you encounter any of these errors, you may have to call us for help and depending on the error, it could take a day or two to determine the problem and fix it.**

However we cannot guarantee that you'll be able to successfully convert your files. If this is the case, you may need to start the Windows program without any invoices. Usually you can import your customers. You'll need to refer to this help screen as you implement the conversion. To print these instructions, click on the print button at the top of this page. If you don't print these instructions, you can switch back and

forth between this screen and CleanSuite by using the **Alt+Tab** keys. Throughout these instructions we refer to "converting" and "importing". As these terms mean the same thing, we use them interchangeably. Minimum Requirements: **Computer** - Windows XP - **1 GHz** processor with **1 GB** of memory. Windows Vista - **2 GB** of memory. If you have a slower computer, you can certainly use it to try the program, but keep in mind, you may have to upgrade. Your network **must** operate at 100 MBPS. Wireless N networks will work, wireless G networks are **not** recommended as they will probably be too slow. **Ink jet printer** - *In the DOS program you can print reports, time cards, statements etc on your thermal invoice printer. In the Windows version, you need an **ink jet, laser** or **dot matrix** printer for these reports.*

Thermal printer - Unlike the DOS version, you cannot print invoices on a dot matrix, 3 inch paper tape printer; the kind with a ribbon. The Windows version **requires** a thermal printer such as the Epson TM 88 or the Star TSP143. **Backup** - Zip and CD drives are fine for doing backups, but we highly recommend USB flash drives. If you're not familiar with them, they're about the size as a small cigarette lighter and have names like jump drive, pen drive, thumb drive, key drive, memory stick etc. They are inexpensive, fast, durable, portable, simple and easy to use! We recommend you have two of them. Rotate them each day, so you always have backups for the last two days.... in case something happens to one of them.

Step 1. - Prepare your DOS version -- Update - Before importing, please ensure your DOS version is dated **July 18, 2003** or later. To check the date, press F10 and select **Help - About CleanSuite**. The version date is in the middle of the "About" screen. If your version is dated prior to July 18 '03, **download the latest DOS update from the CleanSuite website's DOS conversion page. Employee Files** - Between Step 2 and Step 4, do not add or make any changes to the employee files in your DOS version. If you are hiring new staff, add them in now. If you need to terminate any staff, do it now or wait until after implementing Step 4. **Time Cards** - The Time Cards are **not** converted. After the conversion, you can continue to run your time cards in the DOS version or after completing Step 3, you can use the Windows time cards even if you haven't finished with Step 4. **Archive** - If you have a small store, or you want to try the conversion without archiving, skip to "**Step 2**". If you have a busy store and haven't archived or deleted your DOS records for some time, you may want to do so now. This will reduce the time it takes to

convert your data. But **please note**: records you archive in DOS **cannot** be retrieved in the Windows version. If you wait and archive them in the Windows version, you'll be able to retrieve them later.

1. As a safety precaution, run the DOS version's backup routine.
2. Press **F10** to activate the menu for each of the following steps.
3. Select **File - Administration - Archive - Invoices**. We recommend keeping your invoices for at least **three fiscal years**. For example: Archive all data prior to January 1, 2003. After you have converted to Windows, you can archive additional years if you wish.
4. Select **File - Administration - Archive - Customers**. We recommend keeping customers for at least the previous **four years**.
5. Select **File - Administration - Delete - Exceptions**. We recommend you keep the exceptions for at least the last **six months**.
6. Do the same for **Garment Tags** and **Locations**, keeping them for the last **six months**.
7. Backup your archived files. This is in case you want to restore them into your DOS program. (The only time you would probably need to do this is if the tax department wanted to review your records.)

Step 2. - The first conversion from DOS to Windows -- Depending on the size of your database and the speed of your computer, the conversion can take from 20 minutes to several hours. If you are doing the conversion on the same computer you use to run the DOS program; once the conversion has started you can restart the DOS program and continue using it. The conversion will continue to run in the background. **DOS database** - *Use the CleanSuite DOS version's backup program to create the files needed for the conversion.* **Copy** - *If your DOS version and the Windows version are not on the same computer, copy the DOS backup files to a folder on the Windows computer. They can be copied to any folder but it makes it a little easier if you create a folder called C:DC and copy the files to this folder. If you're using the same computer for both the DOS and Windows computer, there is no need to copy the*

files. They are fine in whatever folder you have backed them up to, as long as you remember which folder they're in. **Optional** - If you prefer, instead of using backup files, you can convert directly from the C:DC folder on your DOS computer. However, **before** you start the conversion, you must exit the DOS version of CleanSuite on all your networked computers.

Note: The conversion does not affect your DOS files in any way. It simply copies the files to a temporary folder and then imports them from there. **Install** - If you haven't already done so, install CleanSuite for Windows on your main server/computer. **Taxes** - Start the Windows version. When you get to the **Command Line**, click on the menu **Change - Taxes**. Enter your environmental fees and taxes in the Tax 1 and Tax 2 fields exactly as they are in your DOS version. Delete the values in the Tax 3 fields. For the conversion to work properly, it's imperative you **delete** the third line. After the conversion is completed, you can use Tax 3, but call CleanSuite for instructions on how to convert from two taxes to three. If you don't have any taxes, delete all three taxes. **Delete Samples** - We have included several sample customers and invoices in your Windows database. As long as you haven't yet added your own customers and invoices, click on the menu **File - Administration - Delete Invoices...** When prompted answer **Yes** to removing these invoices, payments and customers. This will clear the database so you can start fresh with your data and records. **Convert** - Click on the menu **File - Administration - Import from other programs - CleanSuite - DOS Version** and enter your password. Follow the on-screen prompts.

1. When it asks if you have read the instructions, answer **Yes**. (This is what you're reading now)
2. When prompted, use the browse window to navigate to the folder where you have your DOS files.
3. When the import screen is displayed press **F12** to start the process. Press **Escape** if you don't want to continue
4. When it asks if you want to delete the employees and create new ones, answer **Yes**. (In Step 4 when you run the import the second time you will answer **No**.)
5. When it asks if you want to delete the Windows price lists, answer **Yes**. (In Step 4 you'll answer **No**.)

6. At this point, you'll be advised when you can restart and use the DOS version. The import will continue in the background.

To cancel the conversion - If the conversion has started and you want to stop the process, hold down the **Ctrl** and **Alt** key and press and release the **Delete** key. When the **Task Manager** comes up, click on **End Task**. Another screen will appear. Click on **End now** and then click on the red **X** in the top right hand corner of the **Task Manager** window. Restart CleanSuite.

Step 3. Setting up the Windows version -- Now that your data has been imported for the first time, there are a number of things you need to do in setting up the Windows version. **Preferences** - In the Windows version click on the menu **Change - Preferences** and enter your password. You'll recognize most of the settings from the DOS version. For the ones you don't understand - **Remember** - no matter where you are in the program, pressing the **F1** key displays the related Help screen. **Coupons, Discounts and Surcharges.** - Click on the menu **Change - Coupons** and enter any coupons, discounts or surcharges you have in your DOS price list. In the Windows program, your coupons are entered here **instead** of in your price list. For help in understanding the new features, press the **F1** key when you are in the "Coupons" form. **Remove Coupons and Discounts** - Click on the menu **Change - Price lists - Main** and enter your password. During the conversion, the Coupons and Discounts you had in your DOS price list are copied into the Windows price list along with everything else. Since you created your Coupons, Discounts and Surcharges in the previous step, the ones in your price list are of no value and should be deleted. Highlight each coupon and press the **F6** key to delete them. Remember to delete these items from **all** the price lists you have. **Ready by** - In the DOS version, each time you start the program you're asked for the number of days before garments are to be ready; you had only one setting. In Windows, you can set the dates and times for each day of the week. To set these days, click on the menu **Change - Ready By defaults**. For an explanation on how to use this screen, press **F1** when you are in the **Ready by** form. **Price Lists** - Click on **Change - Price Lists - Main**. Because the Windows version price list has additional features, you should press **F1** to review the price list help screens and implement any changes you feel are important. **Tip** - Use the **F5** "add" key to add a new item to the price list, upcharge or color

table. Use the **F6** "delete" key to delete items. Click on the **Move Up** and **Move Down** buttons to change the order. And to **skip** from item to item on the price list, press the **Page Down** and **Page Up** keys.

☐ **Pieces** - In DOS there is only one column for the number of pieces. In the Windows version, you can specify if the pieces are dry cleaning, laundry, shirt, repair or other. In most cases, the conversion is able to assign the number of pieces to the correct type, but not always. You should check each item to ensure the number of pieces are in the correct row.

☐ **Sublists** - In the DOS program you had to repeat a sublist heading. For example: "**Household - Afghan**", "**Household - Table cloth**" "**Household - Pillow Case**" etc. In the Windows program, it's not necessary to repeat the "**Household**" heading. Highlight each sublist heading and press **F4**. In this example, the "**Household**" portion can be removed from each of the items in your **Household** sublist.

☐ **Invoice discounts** - In the DOS version, invoice discounts in the price lists are usually entered as 10 and a 1 in the customer's invoice discount field. This has been switched in the Windows version. The price list **Discount** field has a 1 and the customer's **Invoice discount** field has a 10. So...if you see a 1 (or 2 or other small number) in the discount field and you're used to seeing a 10 or 20, leave it the way it is, because your customers now have a 10 in their **Invoice discount** field instead of a 1. If you're not clear about this, just leave the **Discount** field the way it is.

☐ **Starch preferences** - In the Windows version, starch preferences are incorporated into the upcharge list and must be entered into your laundered shirt upcharge list. Click on **Change - Price lists** and scroll down to **Shirt**. For the upcharges to work properly, the category must be **Laundry** and the sub-category must be **Shirt**. Press **F11** to bring up the upcharges and enter your preferences as shown below.

If you don't have upcharges such as **Extra heavy starch** or **Boxed**, you can leave them off the list

Garment Colors - In DOS you are limited to three letters, for example **Blk, Grn, Wht**. In Windows the garment colors can be spelt out in full; **Black, Green, White** etc. Click on **Change - Garment Colors** to make changes to your color list. You can also use the color list for brand names or other descriptors or you can handle these in the up-charge lists.

Employees - In the DOS version you had a number of options for allowing employees to perform certain functions but there were some procedures you had no

control over. The Windows version gives you control over many more aspects of the program. Click on the menu **Change - Employee Files**. Select your own name and enter your password. The box in the top right hand corner shows you a list of the **Procedures** you can customize for each employee. Below that is a list of reports the employee is allowed to run. To switch to another employee, click your mouse on the **Select Other Employees** field in the bottom right corner of the screen. **Check it out** - The first three steps are now finished. Before going to Step 4, we recommend you try the program. **Note:** Before you complete the fourth step, you will remove all the imported and practice data and **re-import** the up to date data; so feel free to add invoices, make payments, run the reports and anything else you would normally do each day. You should be sure that everything you use in the DOS version is working correctly in the Windows version before continuing to the final step.

Step 4. Final import -- Please be absolutely sure you're happy with the Windows version before starting to use it. You can restart and convert from DOS to Windows as many times as you wish, but once you start using the Windows program, you cannot go back to DOS. (Unless you're prepared to manually re-enter all the invoices and payments you've put into the Windows program in the interim.) If you are doing the conversion during a period when no one has been using the DOS version **and** you have not added any practice invoices in the Windows version, you don't need to do this conversion again. However, if you have been adding invoices or payments to the DOS program while this testing and setup has been going on, you need to continue.

1. Before you begin, go to the Cleansuite.com website to find out what the latest version of CleanSuite currently is on. The version you are using is shown at the bottom of this help screen. If there's a newer version, please install the update, as we may have made improvements to the conversion program.
2. Click on the menu **File - Administration - Delete Invoices**. When prompted, remove the invoices, payments and customers. This will clear the database so you can start fresh. This will not remove the price lists, employee files and other settings you made in Step 3.
3. Do a backup. Click on the menu **File - Administration - Change the Backup**. Select a backup folder and backup your Windows database.

4. Click on the menu ***File - Administration - Import from other programs - CleanSuite - DOS Version*** and enter your password.

○ **A. Important:** When it asks if you want to delete the employees and create new ones, answer **No**. You made changes to the employee files in Step 3 and you don't want to delete them.

○ **B. Important:** When it asks if you want to delete the Windows price lists, answer **No**. Same as employees. You don't want to lose the changes you've made to your price list(s).

5. While the final conversion is taking place, you should stop using the DOS version. If the conversion took a long time when you first did it, you might want to start the conversion at the end of the day, let it run overnight and start using the Windows version the next morning.

Congratulations, you're ready to use CleanSuite for Windows!