



ISTechSupport

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Installation Instructions DBA Classic & Evo-ERP 2015.2 Update

Please read the complete instructions before proceeding and contact us if you have any questions. If you have any error messages during the update or using the program after installing the update, please read the Troubleshooting section at the end of these instructions.

Complete update installation: These instructions apply to DBA Classic and Evo-ERP users whether or not previous IS Tech updates have been installed. This update includes all prior IS Tech updates. DBA Classic Version 2002.4 or later is required. If you are updating an older version of DBA Classic, update to DBA 2002.4 or 2004.1 first, then apply this update. You should only be using these instructions if you are updating from a version older than August 2012.

If you have not already installed the August 2012 update, this update will rebuild the General Ledger transaction file (BKGLTRAN) in all companies which can also be a very large file. If you have test companies that are copies of the live company, you can save time by deleting any test companies (System Manager, UT-I) before installing the update, then after the update is complete, recreate them by copying the live company.

If you have not previously installed the January 2012 update then the update process will also perform a data structure rebuild of the inventory master file which will also require a rebuild of the inventory audit file (ISICADT for your company) which can be an extremely large file. If you are not concerned with the audit information, you can use TAS-E (Evo-ERP) or System Manager, UT-A, Program DBAIF in DBA Classic and initialize the ISICADT and ISMICADT files for your company and any test companies. Any prior audit history is in the backup files and new history will begin accumulating in the newly initialized files. You could also use SM-J-S to clear old audit information ahead of time to reduce the file size prior to updating. This will also take time to do but can be done in advance and with users in the system.

1. Complete all the steps in the standard update instructions.
2. Make sure there is a folder named ISTS on the C: drive of each workstation and that it contains at least one file (it can be any file so long as the folder is not empty).
3. Load Evo-ERP or DBA (whichever you use) and for each active company, go to UT-A, and enter program name EVOUTIL. This will run any utility programs that need to be run except those listed below which need to be run manually. **This is NOT an optional step.**
4. To load the latest version of the Evo-ERP programs to the ADMIN menu, you need to log in as ADMIN once to rebuild the menu. Once ADMIN has logged in once, any users designated as "A" Admin equivalent in PS-A that do not have a personal menu in PS-G will have updated menus. To load the newer versions of programs for other users, in PS-G there is an "Update to Latest Prg" button. You can either select a user to edit, then press the button to update only that user, or press the button before selecting any user to edit to update all user menus.
5. Beginning with the August 2012 update, several Java based programs have been added to the Evo-ERP menu. To be able to run these programs, there are some JDBC settings that need to be generated. See www.istechsupport.com/jdbcsetup.pdf for detailed setup instructions.
6. If you have not previously loaded the January 2011 update, the first time you load AR-A in Evo-ERP, a utility will run to transfer the Contact names previously stored in the customer file and

limited to 5 per customer to a new file that allows unlimited individual names per customer, each with up to 10 phone numbers, email addresses, etc.

7. If you have not previously loaded the January 2011 update, the first time you load CM-A in Evo logged in as ADMIN, a new GUI version of the program will load and a utility will run to transfer the Contact Manager data to a new file and transfer names previously stored in the contact file and limited to 9 per contact to a new file that allows unlimited individual names per customer, each with up to 10 phone numbers, email addresses, etc. You need to update user menus to call T7CMA.RWN rather than BKCMA.RUN to use the new Contact Manager. For a more detailed description of the new Contact Manager features and conversion of prior data, see www.istechsupport.com/EvoCM.pdf.
8. Due to new regulations effective July 1, 2010, customer credit card numbers can no longer be stored in the DBA or Evo-ERP database. They can only be stored in the database of systems that have had the security audited and certified to be PA-DSS compliant, typically the credit card processing software itself. You need to be on X-Charge version 7.1.1 or higher to integrate with this version of Evo-ERP. **If you are already using X-Charge or plan to switch to X-Charge, do not install this update until X-Charge version 7.1.1 or higher has been installed so that you can run the utility to transfer your data to the X-Charge server. Contact IS Tech Support for assistance when you are ready to run the utility.** Otherwise, got to UT-A and run ISART to run a utility that will store the allowed credit card data (last 4 digits, card type and expiration date), clear the full credit card number, and send the credit card data to a TXT file in your company data folder for transfer into your credit card processing software if it is PA-DSS compliant and allows for storage of credit card numbers.
9. If you have not already loaded the 12/2008 update, you also need to update your RTM for check printing (DBA Classic and Evo-ERP) and Aging report (Evo-ERP only). The updated RTM is available in the RTX subfolder. Copy the appropriate file to the main folder and rename the extension from RTX to RTM. If you have modified the check RTM for alignment on your checks or other changes, you need to make the same changes to the new RTM, or you can open the new RTM in the RTM editor and copy the field for Invoice Number and paste it into your old RTM.
10. If you have not already done so when installing the 2/14/07 update, you will need to run the new AM-N program to establish the GL Fiscal Period Dates before any transactions can be posted in GL-O or financial statements can be run. **You will also have to run UT-K-D, Recalculate Chart of Accounts** before you can print Financial Statements. Before running UT-K-D, use AM-C to create a new account (such as 99998) called Suspense, type O so that any orphan transactions can be moved to it. If you are using Evo, you will need to log in as ADMIN or use PS-G to add the AM-N (and any other new programs) to your menu.