



**Helper<sup>®</sup>**

# **Standard Upgrade Installation Instructions**



[www.helper.com](http://www.helper.com)

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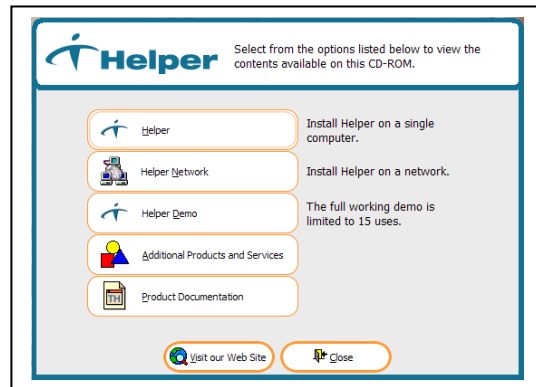
## Quick Installation Instructions

**1**

Insert your Helper Software Installation CD and the setup should start automatically. Or if you downloaded the program from our website, double-click on the file you downloaded (helper.exe) and skip to step 3.

**2**

Select the type of installation you need.

**3**

Follow the instructions onscreen.



## Detailed Installation Instructions

Follow the instructions below to complete a Standard (non-networked) Upgrade Installation of Helper Software.

### Before You Upgrade

Before you upgrade your Helper Software from an earlier version, we recommend the following:

1. Run all of your outstanding bills and process all of your outstanding electronic insurance claims.
2. Run the **Helper Software Data Integrity Check** utility by selecting **Start | All Programs | Helper Software | Data Integrity Check** from Windows.
3. Back up your Helper Software database by selecting **Utilities | Backup Data** from the main menu.
4. The database transfer to update your Helper Software from previous versions can be time consuming (several hours on larger databases). When you schedule a time to run the upgrade, you should take this information into account.

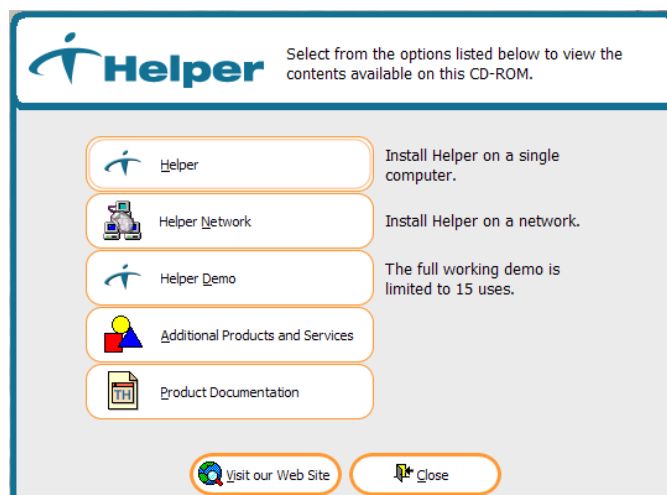
**Note** (for upgrades from v.6.0 through v.6.3): The shared network folder was eliminated to further protect your data. However, this change will cause you to lose any Word Mail Merge or Excel Export templates that you have created in prior versions. You should note down the names and criteria for each of your Word and Excel templates before upgrading. The Word Mail Merge and Excel Export feature has been moved to the Reports section of Helper Software and the layouts for these exports must be recreated. You will not have to recreate the “Main” documents used in the Word Mail Merge, however they must locate these files on their computers as they are stored outside of Helper Software.

5. Back up your Helper Software data. Please refer to the **Helper Software Backup Instructions** available at our website at [www.helper.com/support](http://www.helper.com/support).

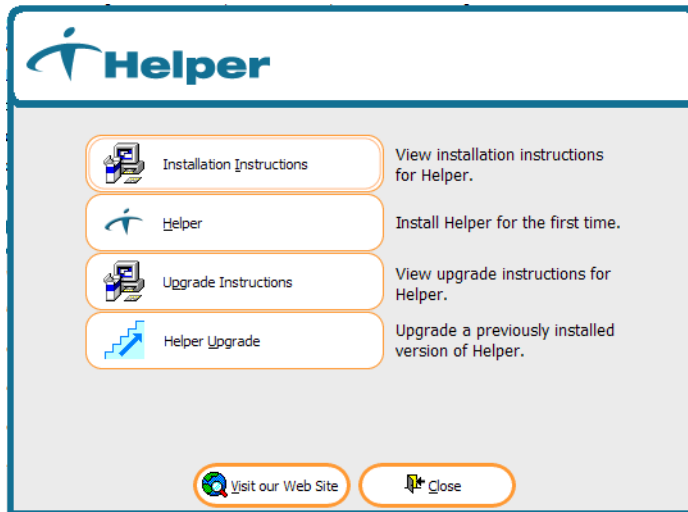
### Running the Upgrade Installation

1. Place the Helper Software Installation CD in your CD ROM Drive. The installation should automatically launch. If the installation wizard does not start automatically:
  - a. From the Windows Desktop, open **My Computer**
  - b. Double click the CD-ROM drive.
  - c. Double click **cdSetup.exe**.

**Note:** If you downloaded the software from the web, double-click on the file you downloaded to launch the wizard.



2. Click **Helper**. The second wizard screen displays:



3. Click **Helper Upgrade** and the Installation Wizard will guide you through the installation process.



**Helper Software's  
Installation Wizard**

4. In the Installation Wizard immediately after choosing the **Destination Location** for your Helper Software Installation, you will be notified that **This update requires a Data Transfer**. On this screen select **Automatically run the Transfer when done installing**. Click the **Next** button and continue to follow the Installation Wizard.
5. Immediately following the Helper Software installation, the Helper Software Transfer will start. Click **OK** at the warning to close all applications and then click **OK** to backup your data (as you already backed up your data.). Then click the **Begin Transfer** button and allow the transfer to run.