

PropertyBoss Single User Upgrade to 10.03

Installation Checklist and Guide

EMC129 - 2016

10.03



PropertyBoss Upgrade – Installation Guide

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Installation Tips and Help Resources

- To have the Upgrade Package email resent, submit a request to Client Care at care.propertyboss.com.
- Shut down all programs and temporarily disable any antivirus software.
- Always click **Allow** on User Access Control (UAC) messages that may pop up during installation.
- Always click **Unblock** on **firewall** warning messages that may pop up during installation.
- If having difficulty completing the installation, submit a request to Client Care for assistance at care.propertyboss.com or call (864) 297-7661 Ext. 2.

Pre-Upgrade Installation Checklist

It is very important to review and have the following information before starting the upgrade.

Database synchronization is required for non-hosted clients that have active web portals.

1. Determine the existing **Database Synchronization** in PropertyBoss.
2. Click **Setup Preferences > Web Services > Define Synchronization Schedule**
 - a. Note the defined schedule. **This info will be needed.**

Define Schedule for Database Synchronization

Note: If you are synchronizing multiple databases to the PropertyBoss Web Servers, you should stagger the times for each database by at least 5 minutes to prevent potential contention problems on your server.

PropertyBoss Directory on Database Server C:\Program Files\PropertyBoss101010\

Scheduled Times 8:00 AM 12:00 PM 3:00 PM 17:00 Standalone Version

Note
You are running the standalone version. The schedule can only execute if you are attached to the database. If a schedule is skipped, synchronization will automatically occur when you connect back to the database.

History of Synchronizations

This Month From 6/1/2013 Thru 6/30/2013

Date Sent	User	Date of Last Database Sync	Status of Last Database Sync
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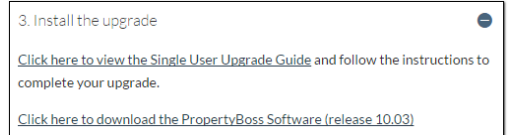
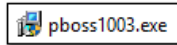
PropertyBoss Upgrade

Step 1: Installing the PropertyBoss Upgrade

Download and install **PropertyBoss** on the computer. All other programs should be shut down, and antivirus software should be temporarily disabled.

Part A: Download Instructions

1. Click the link in your Upgrade Package email to open a browser window with the download link.
2. Click the plus sign on **Step 3. Install the upgrade** then click the **PropertyBoss Software** link.
3. If prompted to **Run or Save**, select **Save** and select desktop as the location; otherwise, the file will probably be saved in your **Downloads** folder.



Part B: Installation Instructions

1. Locate the **pboss1003.exe** icon on your desktop or in the appropriate folder and **RIGHT CLICK and select "Run as Administrator"** to begin the installation.
2. On the **Select Option** screen, select **Update an existing installation of PropertyBoss** then click **Next**.
 - a. If more than one instance of PropertyBoss is installed, select the correct directory then click **Next**.
 - b. If prompted for the installation location, accept the default location.
3. When the installation is complete, the **PropertyBoss** icon will be on your desktop.

Step 2: Upgrade the Database(s)

The following steps need to be repeated for each production database.

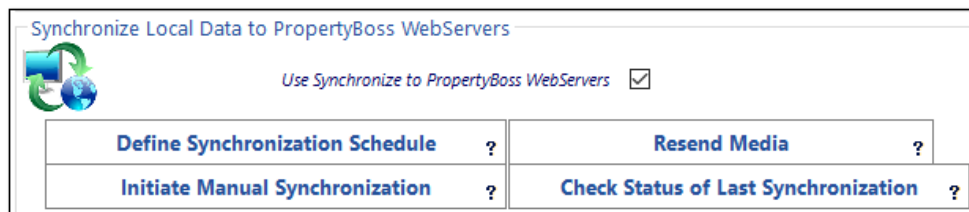
1. Double click the **PropertyBoss** icon and log into your database.
2. The **Database Upgrade Needed** window will open. Click **OK**. A progress window will open.
3. The upgrade process may take between 5 and 15 minutes per database depending on the size of the database.

Step 3: Use Synchronize to PropertyBoss Webservers

Database synchronization is required by non-hosted clients using web portals.

In PropertyBoss, the **Use Synchronize to PropertyBoss Webservers** checkbox must be selected in the databases that need to be synchronized.

1. Launch **PropertyBoss 10.03** and open the appropriate database
2. Click **Setup Preferences > Web Services > Use Synchronize to PropertyBoss Webservers** checkbox
3. Click **OK** and log out and back in as needed.



Step 4: Define the Synchronization Schedule

Clients commonly synchronize mid-morning, mid-afternoon, and in the evening. This option copies (replicates) the database to the PropertyBoss web server creating the flow of information between the web portal(s), the PropertyBoss database, and the database copy on the PropertyBoss web server.

1. Click **Define Synchronization Schedule**
2. The **PropertyBoss Directory on Database Server** location should not have to be changed.
 - a. The **Locate** button will open a file browser to look for the correct directory if needed.
3. Enter the **Scheduled Times** in military format (e.g. 8:00, 12:00, 15:00, 17:00)
 - a. The format will change to reflect the 12 hour am/pm format so 17:00 will change to 5:00 pm.
4. There must be at least one Scheduled Time entered.
5. Click **OK** to complete the setup.

The **History of Synchronizations** section displays when the database was sent and the User ID that initiated the send, as well as the date and the status of the last sync. The **Retrieve** button will update the information contained in the **Date Sent** and **User** columns.

Define Schedule for Database Synchronization

Note: If you are synchronizing multiple databases to the PropertyBoss Web Servers, you should stagger the times for each database by at least 5 minutes to prevent potential contention problems on your server.

PropertyBoss Directory on Database Server: C:\Program Files\PropertyBoss101010\

Scheduled Times: 8:00 AM 12:00 PM 3:00 PM 17:00

Note
You are running the standalone version. The schedule can only execute if you are attached to the database. If a schedule is skipped, synchronization will automatically occur when you connect back to the database.

History of Synchronizations

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Date Sent	User	Date of Last Database Sync	Status of Last Database Sync
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Initiate Manual Synchronization

1. Click **Initiate Manual Synchronization**
2. A DOS window will open, and the process will begin.
3. If there is media to be uploaded, the **Job Cop** window will display.
4. Work can continue in PropertyBoss during this process.