Instructions for moving or reinstalling Dealer Solutions to a new server

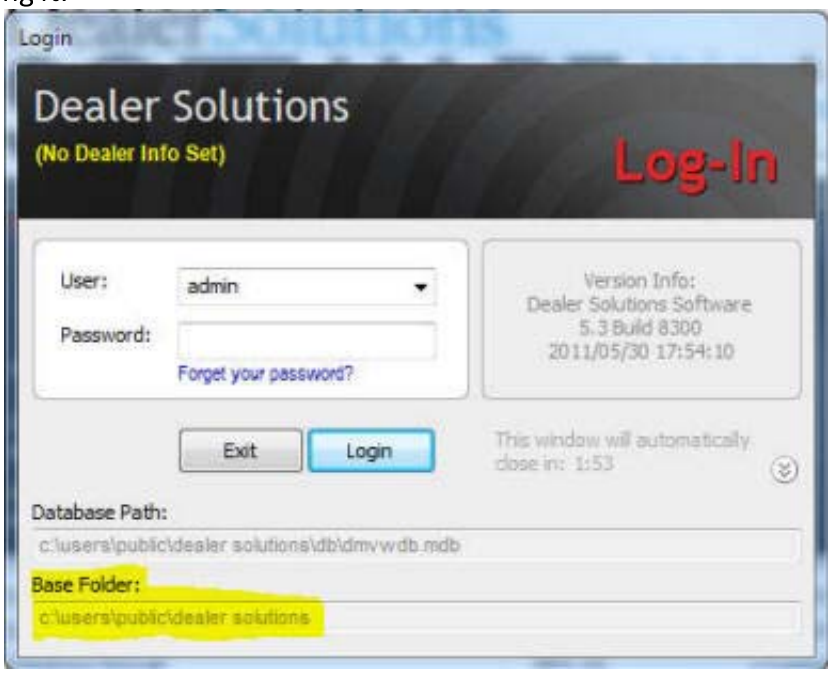
Notes:

- **BEFORE FORMATTING OR DEACTIVATING THE OLD SERVER MAKE SURE TO COPY THE *ENTIRE* DEALER SOLUTIONS FOLDER TO AN EXTERNAL SOURCE!!!**
- You only need to follow the steps below that are applicable to your level of service. For instance, if you do not have a website with us or use our marketing tools, then you may not need to the steps for the Webuploader section.
- If possible, we highly recommend giving the new server the same Windows Network name so that no further steps may be required at each of the workstations.

Moving the software:

1. First, take note of the old software location and network share name. For instance, take note if the Dealer Solutions folder itself is network shared (e.g. \\server\dealer solutions) , or if it is a subfolder in a shared folder (e.g. \\server\apps\dealer solutions or \\server\users\public\dealer solutions)

   You can easily find this information by opening Dealer Solutions to the log in screen from one of the workstation, and by clicking the arrow button in the bottom right corner to show the Base Folder path. You may use the same technique to find where the software is installed on the server for the purposes of copying it:



2. Copy or move the entire Dealer Solutions folder to the new server using the following guidelines:

Old Server OS	New server Windows XP	New Server Vista/7/8	New Server 2003/2008/R2

Windows XP	Same folder	C:\Users\Public\	Custom Folder (e.g. d:\Apps\)
Windows Vista/7/8	Shared Documents or Program Files	Same (or C:\Users\Public if previously Program Files)	Custom Folder (e.g. d:\Apps\)
Windows Server 2003/2008/R2	Shared Documents or Program Files	Same (or C:\Users\Public if previously Program Files)	Same (or Custom folder if previously Program Files)

Notes

- All network users **MUST** have full read and write permissions to the entire Dealer Solutions folder or the program will not even open.
- A custom folder is an option no matter the operating system, but use the public folders for the easiest sharing experience.
- When sharing in Windows XP, be sure to enable the checkbox for "Allow users to modify files"
- If Windows Vista/7/8, be sure to turn on Public Folder sharing and enable "Turn on sharing so anyone with network access can read and write files"
- If using a custom folder, be sure that all users have full write access to the entirety of the Dealer Solutions Folder
- You may want to copy rather than move so that you have a backup plan in case you cannot get the new server to work with the network correctly.

3. Network share the folder just as it was on the old server.

If you have maintained the same name and share location, then the workstation computers should work just as always without any further modification

Making the software work on the server:

1. In the Dealer Solutions folder, run **basecomponents.exe**
2. In the Dealer Solutions folder, run **registerfiles.exe**
3. If you use the QuickBooks interface, then in the Dealer Solutions folder, run **QBFCInstaller.exe**
4. Right-click on **dealmgr.exe** then go to **Send To > Desktop (Create Shortcut)**
5. When you first run the software, you will be presented with a Trial notice which includes a **Machine ID #**. Write this down and email it to us, or call us for an authorization code.

Reinstalling on workstations (If Necessary)

1. THIS STEP IS ONLY NECESSARY IF YOU WERE NOT ABLE TO PRESERVE THE ORIGINAL SERVER NAME AND NETWORK SHARE LOCATION. Try running the software on a workstation for confirmation whether it is running properly or not.
2. To set the software back up on a workstation, first go to the new network share. You may browse to it from Windows Explorer, or you may press Windows Key + R on your keyboard to open the run box, where you may type the location (e.g. \\SERVER\Dealer Solutions) and hit OK
3. Run the NetworkInstaller.exe file
4. Press the install button

5. This must be done from each workstation computer

Installing Webuploader (if you have a website or use the Dealer Solutions Marketing Center program):

1. In the Dealer Solutions folder, go in to the **Extras\Webupload** subfolders
2. Run webupload.exe
3. Right-click on the red K3 icon in the system tray (icons next to the time in the bottom right corner of the screen)
4. Go in to the settings, and make sure the login information matches that listed above.
5. Hit the "Run at Startup" button on the settings screen
6. Be sure any firewalls/antivirus are configured to allow this program to communicate over the internet

Installing DSMC (If you subscribe to our Dealer Solutions Marketing Center software)

1. Go to https://vpix.us/DSMC
2. Download and save the DSMCLauncher.exe file to a permanent location (such as your Downloads, Documents, or Desktop)
3. Be sure any antivirus or firewall software is configured to allow the DSMCLauncher.exe file full access to the internet
4. Run DSMCLaucnher and allow it to create a shortcut and download the newest update
5. Enter your login information listed above for access

Configuring Old Craigslist tool (if you upload to craigslist without DSMC):

1. Open the craigslist tool (or create a new shortcut for it. The file is located in the **Dealer Solutions\craigslist** folder)
2. Hit the Settings button at the top
3. Fill in the Username and Password (same as the Webupload information)
4. Fill in the Specific Location Default (e.g. "Raleigh" or "I-485 and Providence")
5. Fill in title format (e.g. "$YEAR $MAKE $MODEL")
6. Hit OK to save your changes
7. Log in the craigslist (we do not have this information, it will be your own craigslist account)

Installing MozyPro (if you have a backup plan through us):

1. Go to http://mozy.com/pro/download
2. Download the appropriate version for you system
3. Use the information provided above when installing, and confirm (if asked) that you will be overwriting your old backup set with this new one.
4. Be sure that it is configured to back up the Dealer Solutions folder, especially if it is in a non-default location. Any backup sizes less than 150MB are most likely not backing up the correct files.

QuickBooks Integration Tips:

If you use the QuickBooks integration, be sure to share the QB company file in the same location as previous, or the integration settings may need to be changed to reflect the new location.

QB company file location settings for integration may be changed in Dealer Solutions by clicking **Tools** on the menu across the top, then **QuickBooks Settings…** Change the QB File location in the **Select your QuickBooks company file** field. If QB is already installed and the QBFC has been installed also, you may use the **>> Launch this QuickBooks** file or **>> Connect to QuickBooks and Populate Account Lists** links to test if your settings are correct. Please refer to the integration manual for more details http://www.dmvwizard.com/faq/08_QB.htm