



## fotoBiz 2 to fotoBiz X Upgrade Instructions Windows Users

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Your new fotoBiz X program uses a different file structure than the older fotoBiz 2. Your fotoBiz 2 data needs to be converted to the new file structure before it can be imported into fotoBiz X. We supply you with a converter program that automates the process.

In your upgrade announcement or order email you are directed to two download links, one for the fotoBiz X program installer and the other for the fotoBiz 2 Converter.

Please follow the steps below to install and authorize fotoBiz X, and to convert and import your fotoBiz 2 data into your new program.

Your upgrade announcement or order email also included your fotoBiz X serial number. This number starts with FB10. Be sure to locate this information now before you install the program and begin the upgrade procedure.

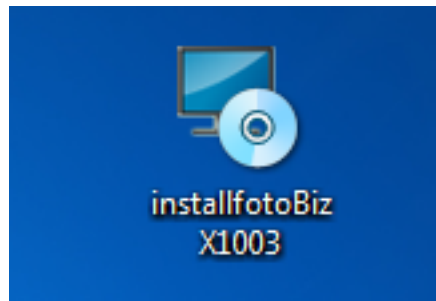
**Important Note for Windows Users: You must be logged in as an Administrator during the Installation, Conversion, and Import from FB2 processes.**

## Step One: Installing fotoBiz X

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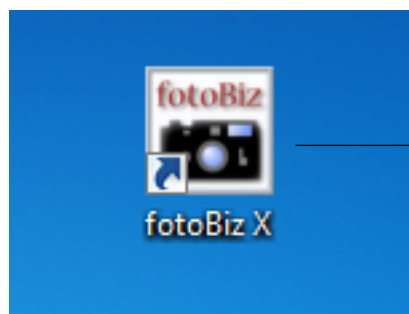
Double click the fotoBiz X download link in the email we sent you to initiate the download.

After downloading, if the installfotoBizX1003 file is in your downloads folder it is best to move it to your desktop.



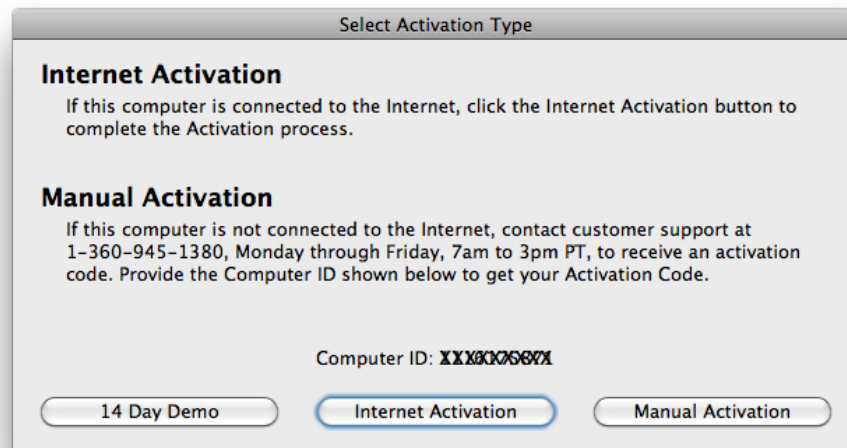
Double-click the “installfotoBizX1003 icon to begin the installation and follow the instructions.

Once the installation is complete a short cut file will be placed on your desktop. Select this icon to launch the program.



*Double-click  
the shortcut  
icon to open  
the program*

Once fotoBiz X is open you will be asked to activate the program. A dialog box like the one below will appear. If your computer is connected to the Internet, select the Internet Activation option.



Enter your serial number, name and company name in the appropriate fields.

A screenshot of a "Registration and Activation" dialog box. It includes a note: "Serial Number is case sensitive and the dashes are required." Below this is a table with four rows: "Serial Number", "First Name", "Last Name", and "Company". The "Serial Number" field is currently selected and highlighted with a blue border. At the bottom right of the dialog are two buttons: "14 Day Demo" and "Activate Now".

When done you will receive a notice that the application has been successfully activated.

fotoBiz X contains sample data. Because of the fotoBiz X user interface re-design you should look at the sample data to familiarize yourself with your new program. Create documents and experiment with the program before upgrading your data. Any personal company information you've entered can be saved. All other data will be deleted along with the sample data as part of the upgrade process.

You can download the User's guide from our website at:

<http://www.cradocfotosoftware.com/downloads/manuals/fotoBiz-X-User-Guide.pdf>

## Step Two: Converting your fotoBiz 2 Data

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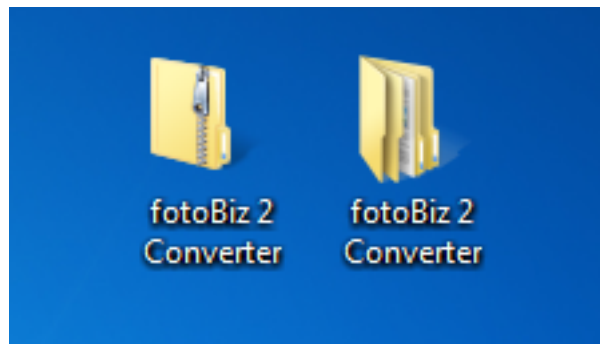
First, back up your entire fotoBiz 2 folder now. The backup must be created via the fotoBiz 2 backup feature built into the program because of Windows virtualization. The procedure for this is as follows:

- Open the program and click the "Backup" button on the left gray menu bar
- Close the program
- Open the program in the backup folder and check that all your data is there
- Click Setup in left gray menu bar to go to Setup screen
- Set the "Reminder to Backup Every 'X' Program Exits to blank
- Click the "Find All for Update V2" button

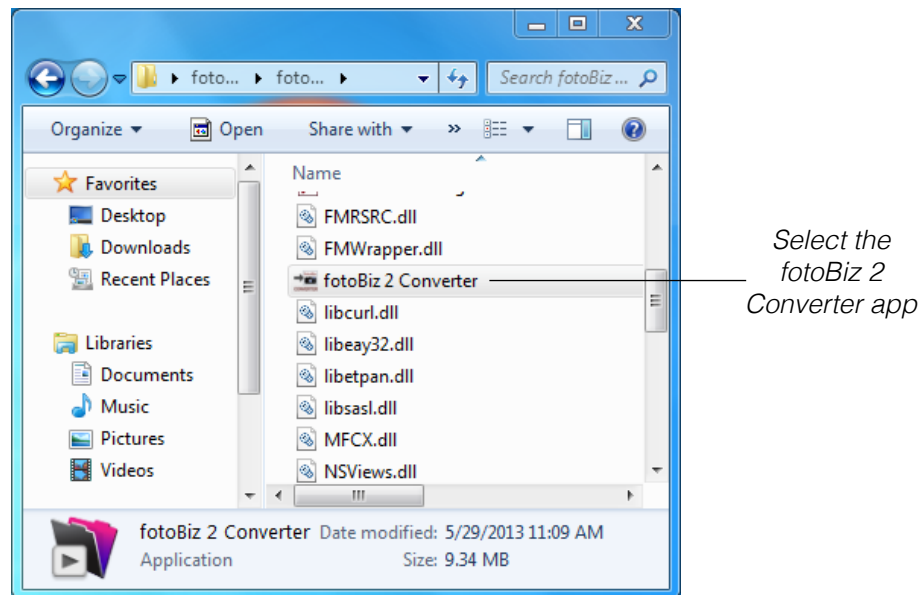
It is very important that you backup your fotoBiz 2 program in this manner and use this file in the conversion process. The use of any other files will not capture your fotoBiz 2 data for the conversion.

Now, download the fotoBiz 2 Converter file from the link in your order email or upgrade announcement.

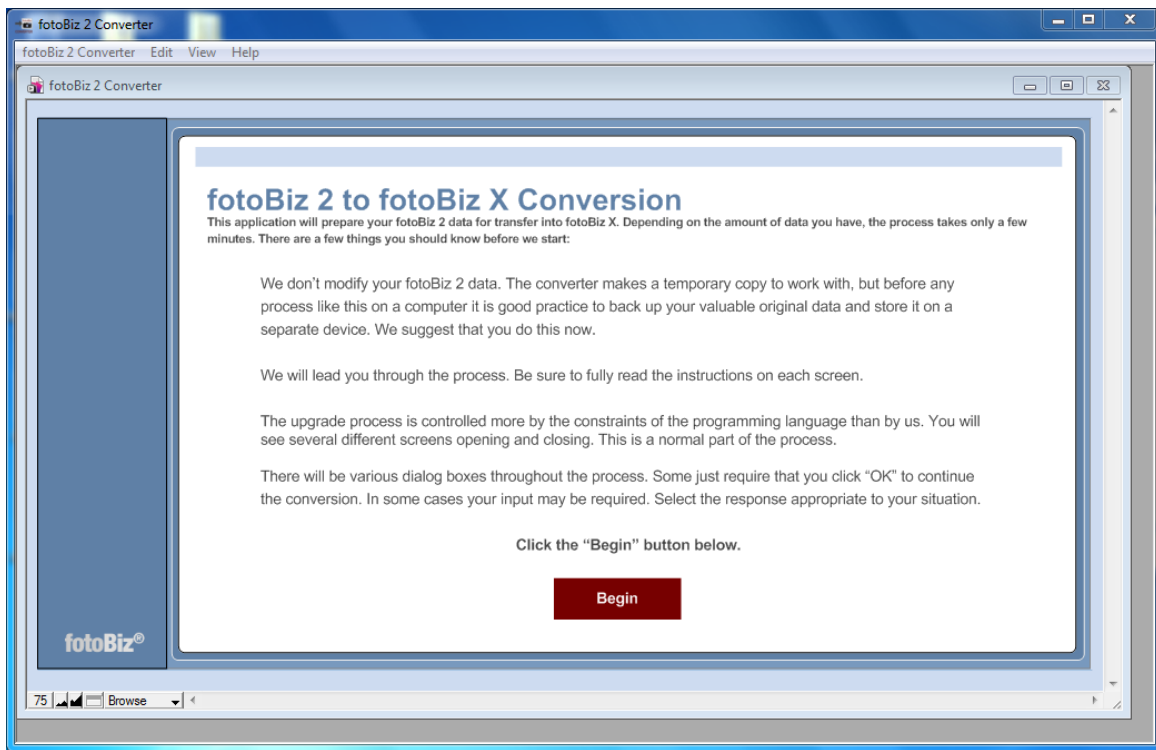
If the file is in your downloads folder it is best to move it to your desktop and un-zip it from there. The files will look like this. Make sure that the un-zipped fotoBiz 2 converter folder is also on your desktop.



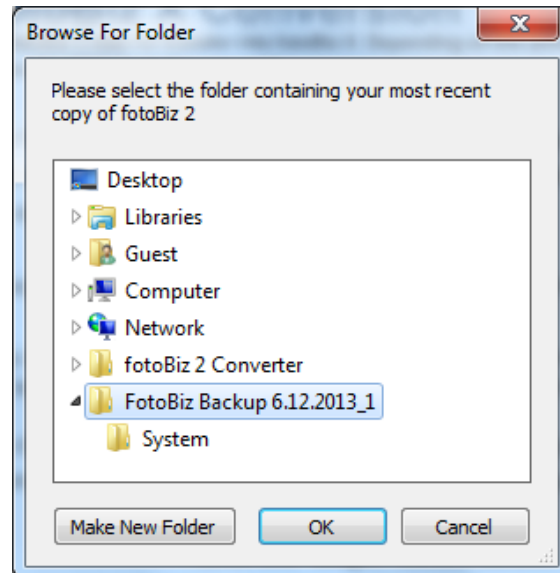
Open the fotoBiz 2 Converter folder and double-click the fotoBiz 2 Converter app to begin.



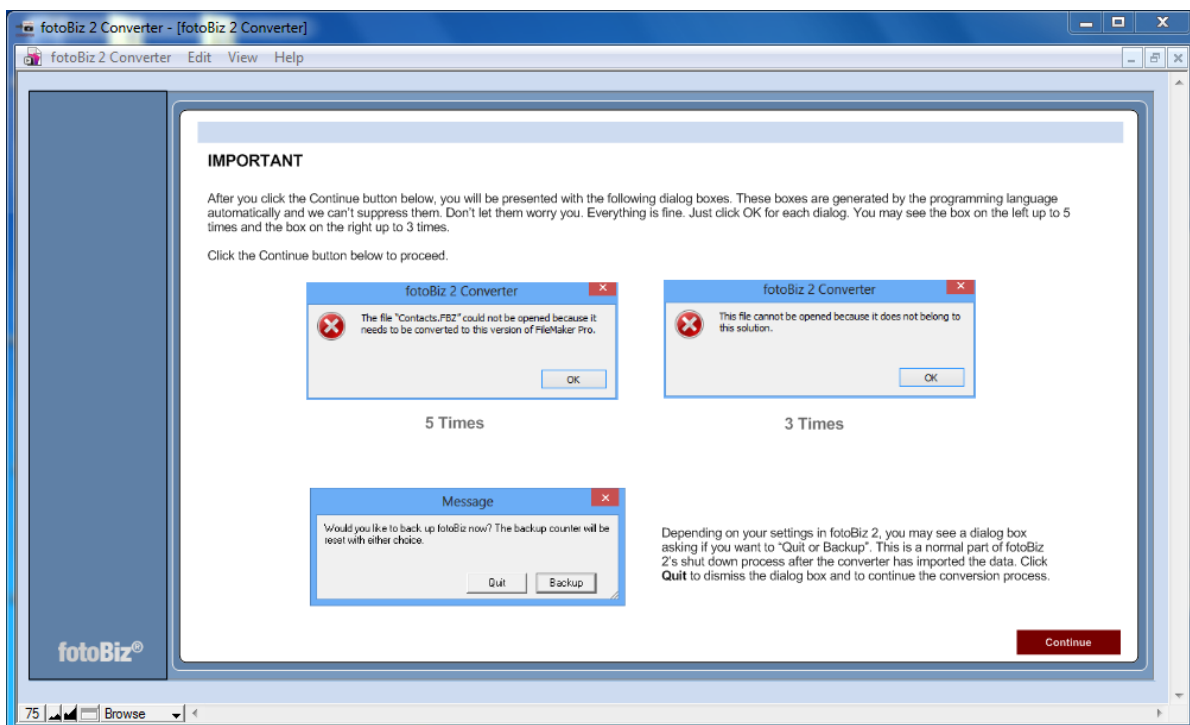
You will be presented with several instructional screens as part of the conversion process.



When you select the Begin button you will be asked to navigate to your most recent backup copy of fotoBiz 2. Find this **folder** and select the OK button. **NOTE: YOU SELECT THE FOTOBIZ 2 BACKUP FOLDER YOU JUST CREATED PER THE INSTRUCTIONS ABOVE.**

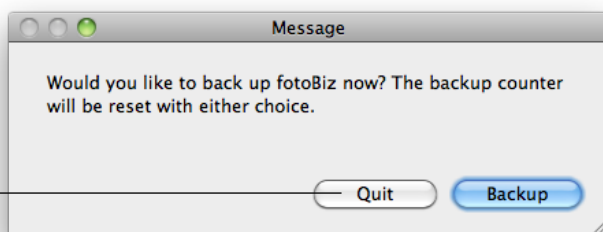


After you have selected the folder containing your most current backup of fotoBiz 2, you will be presented with the following screen. Read the instructions carefully and select the Continue button.

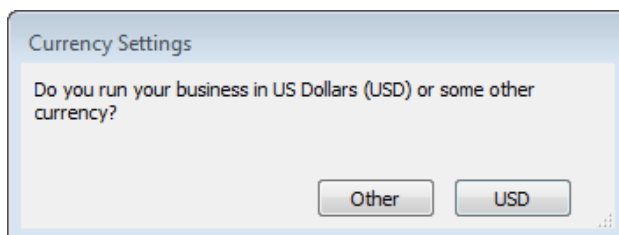


Depending on your settings in fotoBiz 2 you may not see the Backup box. If you see it, DO NOT backup. Select Quit.

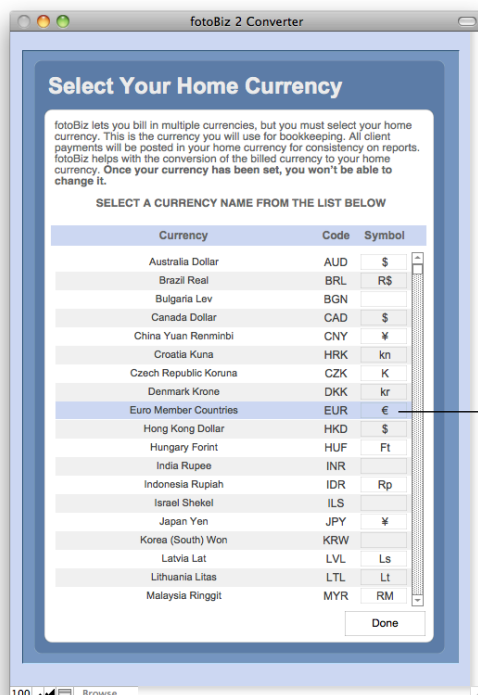
Select the  
Quit  
button



The next dialog box will ask if you run your business in US Dollars or some other currency.



If you select Other, you will be asked to select a home currency. Currency Selection only applies if you do not run your business in USD. From the screen below you will be given the option to select your home currency. Edit the currency symbol if necessary.



Select your  
home currency  
from this list and  
then select the  
Done button

The next few screens will clarify how you want some fotoBiz 2 data converted.

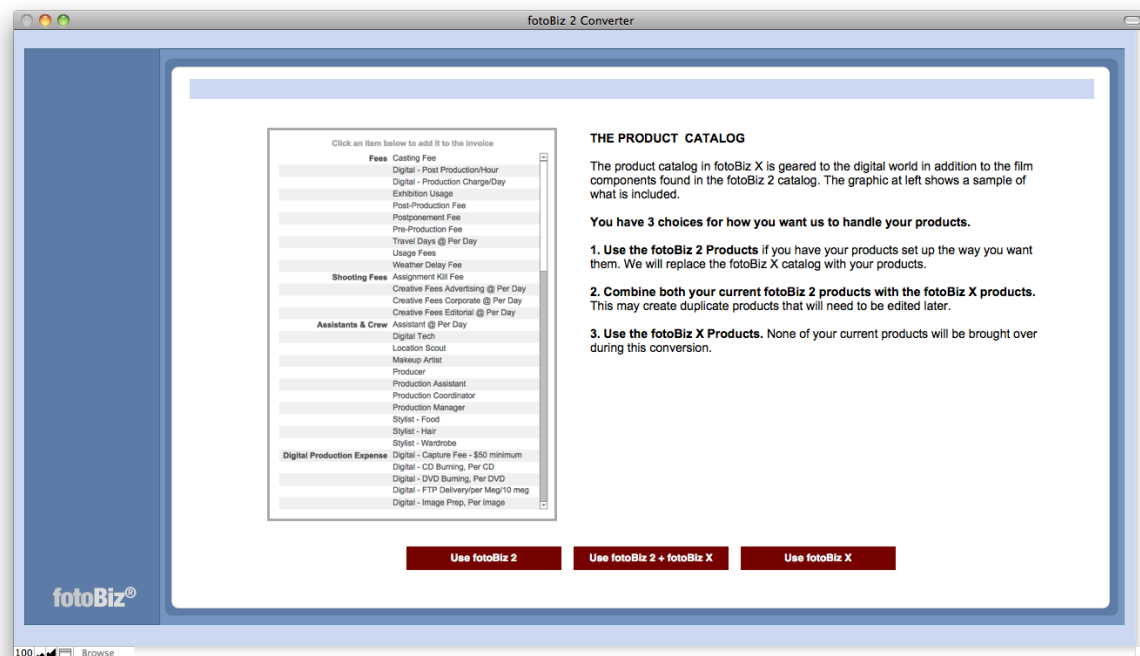
## Product Catalog

The fotoBiz 2 Product Catalog was centered in the film world, and the catalog in fotoBiz X is in the digital. The fotoBiz X catalog also retains film items for consistency. You need to choose what Product Catalog to use in your new fotoBiz X program.

**Use fotoBiz 2:** This selection will replace the sample products list in fotoBiz X with your fotoBiz 2 data. Use this if you have things the way you want them in fotoBiz 2.

**Use fotoBiz 2 + fotoBiz X:** This option will combine both product catalogs, yours from fotoBiz 2 and the fotoBiz X products catalog. Some duplication of products may occur with this option that will later need to be resolved.

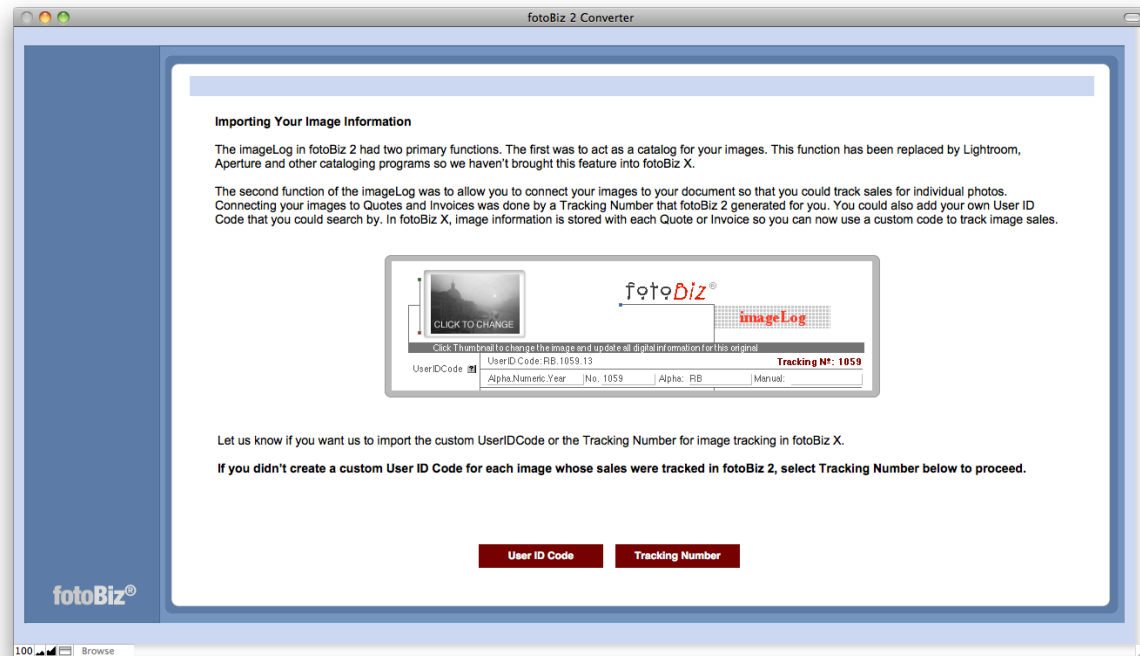
**Use fotoBiz X:** Products you created in fotoBiz 2 will not be brought over to fotoBiz X





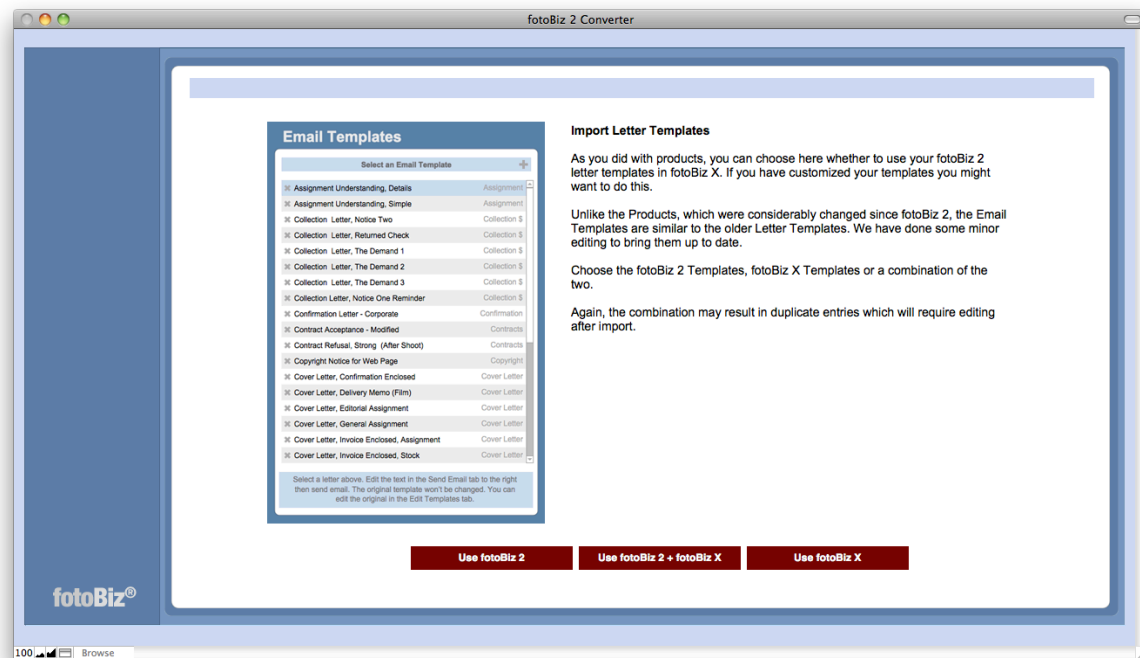
## Image Information

On this screen you will be asked to select what code or number you want used to track your images in fotoBiz X. Please read the text carefully and select either the User ID Code or the fotoBiz 2 generated Tracking Number. If you didn't set up your own coding system or didn't use the imageLog in fotoBiz 2, select Tracking Number.



## Email Templates

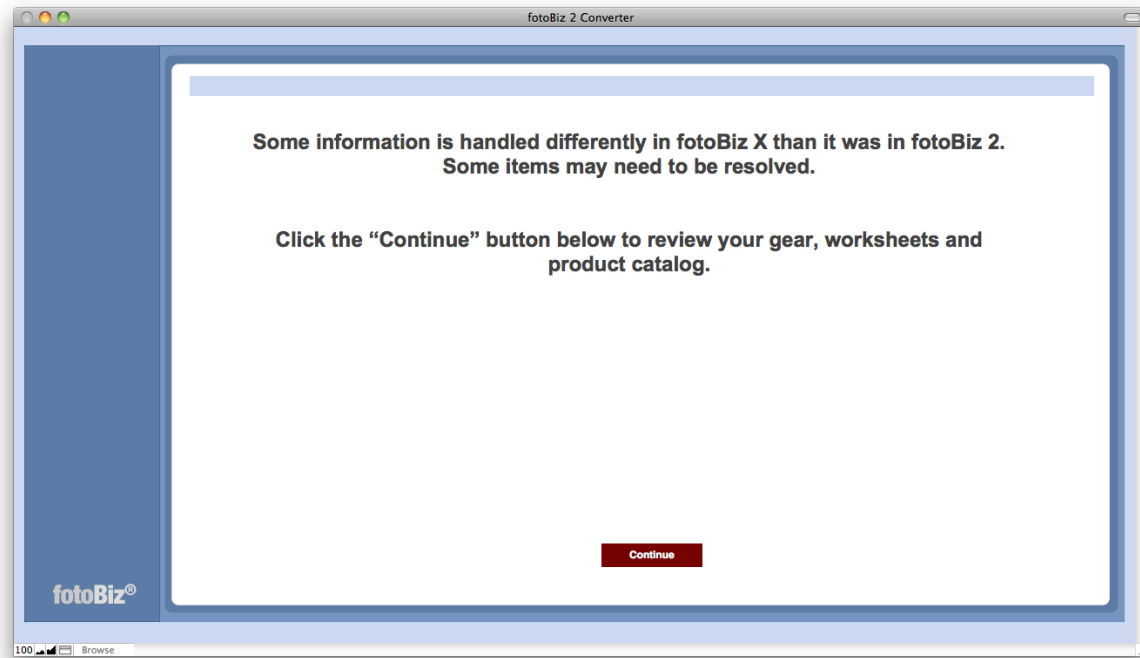
The handling of your email templates is the same as it was for managing the conversion of your Product Catalog. From the screen below make your selection to either Use fotoBiz 2, combine the two sets of templates by choosing Use fotoBiz 2 + fotoBiz X or use only those templates included in fotoBiz X.



In fotoBiz 2 these were a combination of email and letter templates. In fotoBiz X they are all treated as email templates. Unlike the Product Catalog differences, the email templates in fotoBiz X are similar to the templates in fotoBiz 2.

## Data Review

fotoBiz X handles some information differently than in fotoBiz 2. To make sure that the information is being converted properly, you may be asked to review some of the data.



## Assigning Gear Categories

If you used the gear module in fotoBiz 2, you will be asked to assign each piece of gear to a category. Use the tagging feature, described below, to assign batches of gear to a specific category versus making the assignments one at a time.

Make	Model	Item Type	Serial Number	Bag	Category
<input type="checkbox"/> Adobe	PhotoShop CS6	Software	1234577		
<input type="checkbox"/> Mac	MacBook Pro	Computer Equipment	WS7854C154		
<input checked="" type="checkbox"/> Make	Model	Equip Type	SN#	Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	28mm 2.8 Elmarit-M	Lens	36713555	M-Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	28mm Finder	Accessory		M-Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	35mm Summicron - M2.0	Lens	35924555	M-Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	50mm Summicron - M 2.0	Lens	35069555	M-Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	90mm Tele-Elmarit-M 2.8	Lens	34308555	M-Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	50mm Finder	Accessory		No Bag	Photo/Video
<input checked="" type="checkbox"/> Pentax	Digital Spot Meter	Light Meter	14555555	No Bag	Photo/Video
<input checked="" type="checkbox"/> Sekonic	Flashmate L308B	Light Meter	40803555	No Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	28mm R 2.8	Lens	32311555	R-Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	50mm Summicron R 2.0	Lens	31109555	R-Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	70-210 Vario Elmar f4 Zoom	Lens	33318555	R-Bag	Photo/Video
<input checked="" type="checkbox"/> Leica	35mm Summicron 2.0	Lens	16555555	Tenba Single Body	Photo/Video
<input checked="" type="checkbox"/> Leica	50mm 2.8 Elmar Collapsible	Lens	15758555	Tenba Single Body	Photo/Video
<input checked="" type="checkbox"/> Leica	135 Tele-Elmar 4.0	Lens	21889555	Tenba Single Body	Photo/Video

Some insurance companies require that gear schedules be categorized into four categories: Photo/Video equipment, Computer Hardware, Computer Software, and Office Equipment. FotoBiz X uses the "Category" field to do this. You can set the category of each gear item above. **To change multiple items at once, tag them using the check box on each line, choose a category from the menu below, then click the "Assign" button.** Assigning categories is optional and you can also change the category for individual gear items later if you prefer. It is much easier to assign the categories now in a batch. If you don't use the Gear module of fotoBiz or don't need the insurance report feature, you can skip this step, just click Done.

Set the category of all tagged gear items to:

Assign individual gear items to a category by selecting it from the menu

Tag all the gear items that will be assigned to the same category

Select the Category from this menu and select the Assign button to the right

Assigning your gear to categories lets fotoBiz X prepare insurance submission lists for you that meet the criteria of some insurance companies.

## Assigning Product Types

In fotoBiz X all products must have a Product Type identified. Each item must be assigned to one of these four options below. You must assign a Product Type to any items in your product catalog that don't meet the fotoBiz X criteria.

- Fee
- Expense
- Usage Fee
- Billed Direct

*Click into this field to make your Product Type selection*

Product Type	Reassign to:	Example Product
Credit		Credit
Late Fee		AAA New test product
Usage	Usage Fee	Usage - Infomercial Web Ad (3 mos)
Creative Fee	Fee	Non-Profit Event

In fotoBiz 2 it was possible to have user defined product types. That is no longer possible in fotoBiz X. During the import process the converter scanned your products catalog, invoices, and estimates. Above are all of the products types that were found. You will need to review those items and assign them to the appropriate fotoBiz X Product Type (Fee, Expense, Usage Fee, or Billed Direct). For each of your fotoBiz 2 product types an example description (if available) has been pulled from your product catalog, estimates, or invoices to assist you.

Once you are done making your product type assignments a red Continue button will be displayed.

## Verifying Records

The converter in some cases may not have been able to separate blocks of data into individual fields. Review the highlighted areas for accuracy and make any necessary changes. Select the Done button in the lower right corner when you are finished reviewing the data for each record. The highlighted area doesn't mean that the information is wrong, but just that fotoBiz X isn't sure and would like you to look at it.

The screenshot shows the 'fotoBiz 2 Converter' application window. On the left, a sidebar indicates 'Records Remaining: 1'. The main area is titled 'Invoices' and displays a form for invoice No. 1042, dated June 16, 2012. The job title is 'Annual Report 2012'. The customer information includes Name: Rebecca Lopez, Title: Convention Sales & Service Manager, Company: Flagstaff Convention Center, Address: 98 W. Wildwood Ave, City/State/ZIP: Flagstaff AZ 86909, Country: USA, Phone: 123-569-8452, Fax: 123-569-8741, and Email: mail@reau.com. The taxpayer status is 'Out of State' and the job category is 'Corporate'. The totals section shows a SubTotal of 1,075.00, a Grand Total of 1,075.00, and a Balance Due of \$1,075.00. On the right, there is a table with columns 'Description', 'Product Type', and 'Amount'. Below the table, a red box contains a warning: 'Please check the highlighted fields and make any necessary corrections'. It explains that the converter couldn't separate the customer's full name into first and last names or the full address into city, state, and zip, and that some items were flagged as 'UNASSIGNED'.

Records Remaining: 1

**Invoices**

No. 1042 June 16, 2012

Job Title: Annual Report 2012

Name: Rebecca Lopez

Title: Convention Sales & Service Manager

Company: Flagstaff Convention Center

Address: 98 W. Wildwood Ave

City | State | ZIP: Flagstaff AZ 86909

Country: USA

Phone: 123-569-8452 Fax: 123-569-8741

Email: mail@reau.com

Taxable ☐ Taxpayer Status/Group: Out of State

Job Category: Corporate

Client's Job #

Client PO #

TOTALS

SubTotal:	1,075.00
Sales Tax	
Grand Total	1,075.00
Total Payments:	
Balance Due:	\$1,075.00

**Please check the highlighted fields and make any necessary corrections**

**Name/Location (City, State, Zip):**  
In some cases the converter couldn't separate the Customer's full name back out into First Name and Last Name fields or the full address into City, State, Zip. Please review the Name and Address fields and make corrections as necessary.

**Product Type:**  
In fotoBiz 2 it was possible to add a line item to an estimate or invoice with no product type. These items have been flagged as "UNASSIGNED" and will need to be corrected on each worksheet.

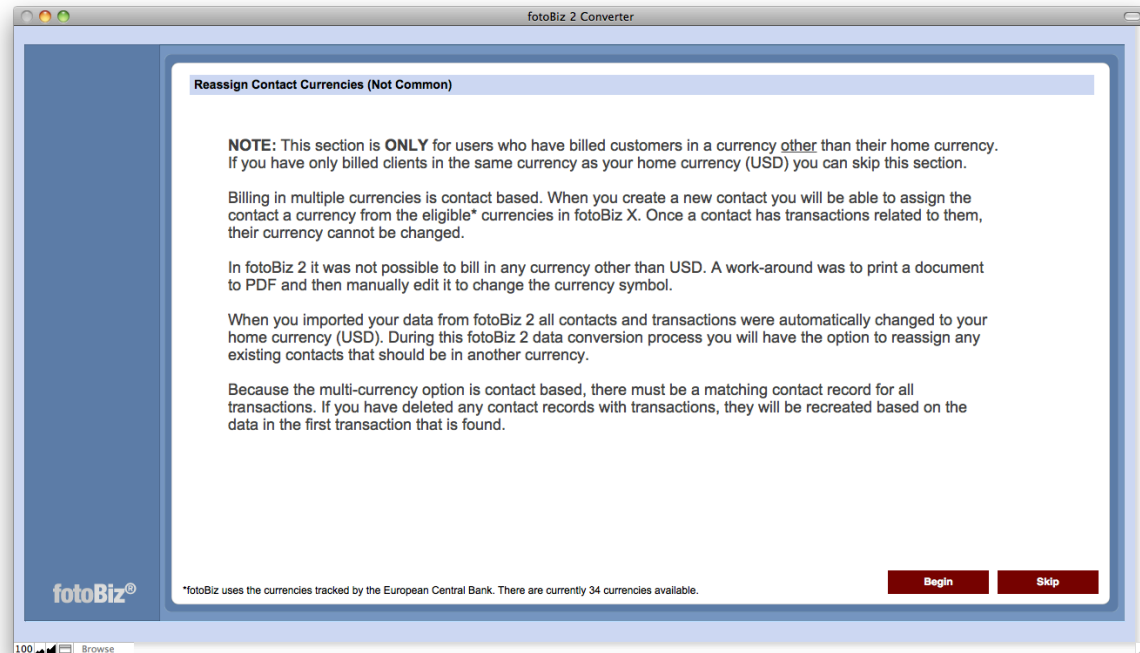
Done

You may see a screen like this for various modules of the fotoBiz X program. This example is for Invoices, but you may also need to review records in other areas such as Contacts, Stock Quotes, Assignment Estimates, Delivery Memos, etc.

In some cases you may need to review several records. This is a one time event. Taking your time with this process now will mean that you won't have to update or revise data down the road.

## Reassigning Currencies

This is not a common occurrence. If you have only billed customers in your home USD currency select the Skip button in the lower right corner.



If you have billed customers in a currency other than your home currency, read this information over **carefully** and select the Begin button. The next few screens will illustrate what you need to do in this instance.

For those who selected Skip, go to [page 19](#) to complete the conversion process.

## Setting Active Currencies

Check the box next to each currency you wish to identify as active. When you chose to show only those currencies that are active, the menu will be much shorter. Edit the currency symbol if necessary. Once an invoice, etc has been assigned a currency, its currency and currency symbol can't be changed.

*Select which  
currencies you  
want displayed  
as active*

Active	Currency	Code	Symbol
<input checked="" type="checkbox"/>	Australia Dollar	AUD	\$
<input type="checkbox"/>	Brazil Real	BRL	R\$
<input type="checkbox"/>	Bulgaria Lev	BGN	
<input type="checkbox"/>	Canada Dollar	CAD	\$
<input type="checkbox"/>	China Yuan Renminbi	CNY	¥
<input type="checkbox"/>	Croatia Kuna	HRK	kn
<input type="checkbox"/>	Czech Republic Koruna	CZK	K
<input type="checkbox"/>	Denmark Krone	DKK	kr
<input checked="" type="checkbox"/>	Euro Member Countries	EUR	€
<input type="checkbox"/>	Hong Kong Dollar	HKD	\$
<input type="checkbox"/>	Hungary Forint	HUF	Ft
<input type="checkbox"/>	India Rupee	INR	
<input type="checkbox"/>	Indonesia Rupiah	IDR	Rp
<input type="checkbox"/>	Israel Shekel	ILS	
<input type="checkbox"/>	Japan Yen	JPY	¥
<input type="checkbox"/>	Korea (South) Won	KRW	
<input type="checkbox"/>	Latvia Lat	LVL	Ls
<input type="checkbox"/>	Lithuania Litas	LTL	Lt
<input type="checkbox"/>	Malaysia Ringgit	MYR	RM
<input type="checkbox"/>	Mexico Peso	MXN	\$
<input checked="" type="checkbox"/>	New Zealand Dollar	NZD	\$
<input type="checkbox"/>	Norway Krone	NOK	kr
<input type="checkbox"/>	Philippines Peso	PHP	
<input type="checkbox"/>	Poland Zloty	PLN	z
<input type="checkbox"/>	Romania New Leu	RON	lei
<input type="checkbox"/>	Russia Ruble	RUB	
<input type="checkbox"/>	Singapore Dollar	SGD	\$

Show:

**Set Active Currencies**

Set your active currencies here by checking the box in the "active" column. Setting active currencies simplifies the process of assigning currencies by only displaying the currencies you use. You can edit this later if necessary.

You can also edit the currency symbol for each currency.

**Back Done**

*Choose All,  
Activate or Inactive  
from this list*



## Reassigning Contact Currencies

You can reassign currencies one-by-one for each contact or you can do them in groups by tagging all of your Euro currency contacts and then assigning them all at one time.

*Tag contacts  
you want to  
assign in  
groups*

**Reassign Contact Currency**

Name	Company	Address	Country	Currency Code
<input type="checkbox"/> Robert Brown	Art Unlimited	398 Duthie Rd • Hatfield MA 19220		USD
<input type="checkbox"/> Rebecca Lopez	Flagstaff Convention	98 W. Wildwood Ave • Flagstaff AZ 86909		USD
<input type="checkbox"/> Test Record	Acme Designs	12345 Happy Ln • Pleasantville PA 02546		USD
<input type="checkbox"/> AAA Test Record	*	*		USD
<input type="checkbox"/> Susan Klumpp	Klumpp & Company	43 Fruhlingstrasse • Berlin DE 10405	Germany	EUR
<input type="checkbox"/> Carl Warren	Eating Right Magazine	Lettenhofstrasse 89 • Zürich CH 8045	Switzerland	CHF
<input type="checkbox"/> Pauline Barron	Women's Journal	347 North Woods Way • Harrison IN 46409	USA	USD
<input type="checkbox"/> Lucy Brown	The Hawaii Hiltonian	2364 Waikiki Parkway • Lahaina HI 96964	USA	USD
<input type="checkbox"/> Jim Burger	Rowing Magazine	5520 8th Ave • Trumbull CT 06611	USA	USD
<input type="checkbox"/> Terry Divine	Grey Advertising	87 Broadway 4th Flr. • New York NY 10333	USA	USD
<input type="checkbox"/> Mary Feldman	World Magazine	944 Macarthur Boulevard • Springfield NJ 07532	USA	USD
<input type="checkbox"/> Paul Hertz	New Times Publishing	PO Box 309 • Laconia NH 03330	USA	USD
<input type="checkbox"/> Jacqueline Johnson	Art Unlimited	395 Duthie Rd • Hatfield MA 19220	USA	USD
<input type="checkbox"/> Carol MacLean	City Sights Magazine	Box 877 • Marina del Rey CA 90009	USA	USD
<input type="checkbox"/> Carli O'Brien	International Design	PQ BOX 246 • Denver CO 80234	USA	USD
<input type="checkbox"/> Thomas Right	Manhattan Publishing	11 W 25th St. 8th Fl. • New York NY 10001	USA	USD
<input type="checkbox"/> Leslie Slope	Art Unlimited	398 Duthie Rd • Hatfield MA 19220	USA	USD
<input type="checkbox"/> Robert Thomas	Stars and Stripes	334 W Shore Ave • Winter Park FL 32786	USA	USD
<input type="checkbox"/> Joel Thompson	Builder's World	6201 Weir St • Niles IL 60009	USA	USD
<input type="checkbox"/> Lillian Valley	Woman's Way Magazine	111 N Tree Dr • Reston VA 22476	USA	USD

Set the currency code of all tagged contacts to:  **Assign** **Tag All** **Clear Tags** **Back** **Done**

*Select  
currency code  
from here for  
individual  
contacts*

*Select the currency from here that  
you want to assign to the group of  
tagged contacts. Then click  
Assign to reassign the group*

You have the option to reassign each contact's existing transactions to their new currency. For reporting purposes, this is highly recommended.

It is very important that you read the Help section on contact currency reassignment. Please do this now before you make your decision.

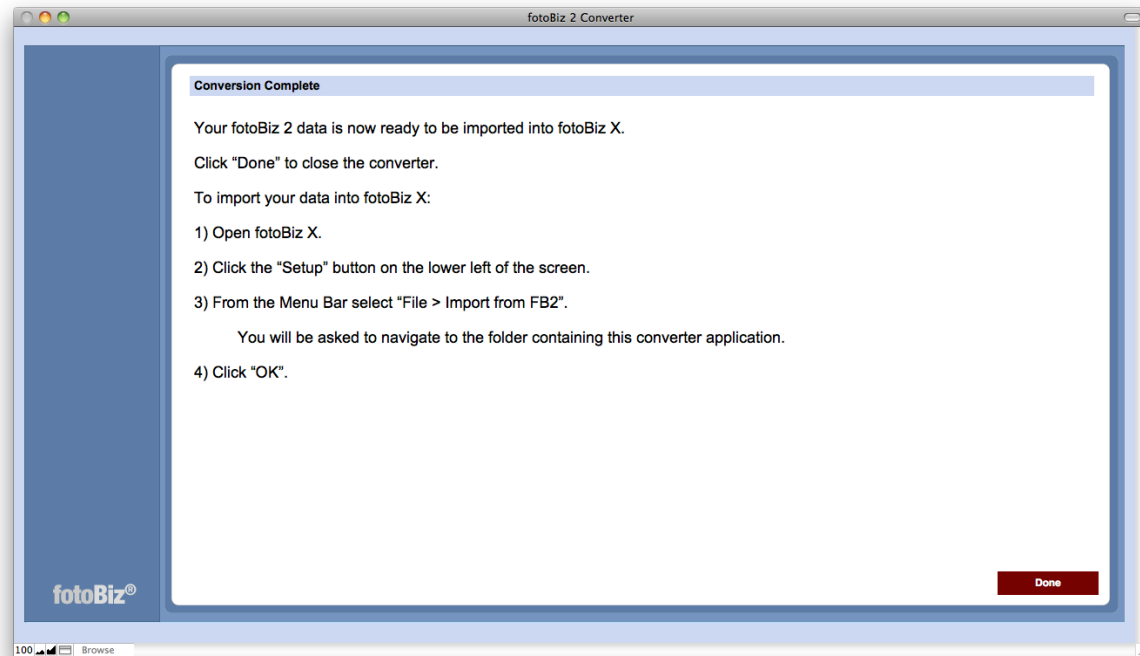
[illegible]

*Reassigning or not reassigning an existing contact's currency will impact your reporting, be sure to read the Help section first*

Once your decision is made, click on the Done button to complete the conversion.

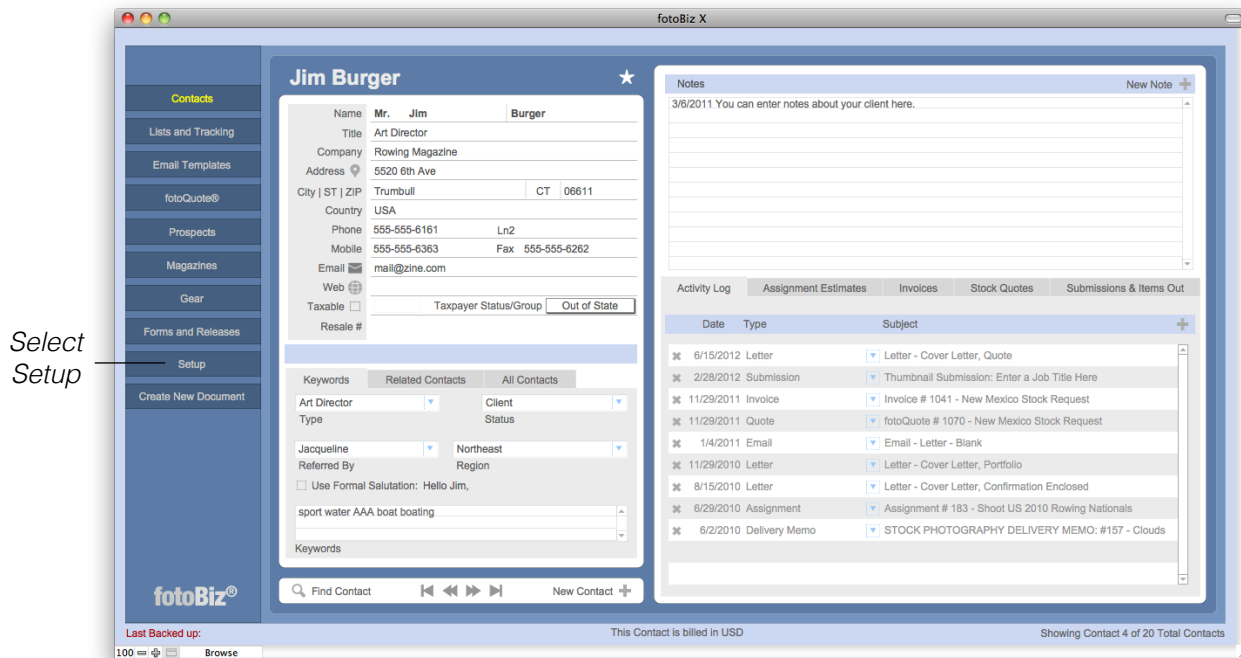
## Conversion Complete

If you skipped the reassignment of currencies, the next screen you see should indicate that the conversion is complete. Please be sure to read the information on this screen to understand your next steps for completing the upgrade.

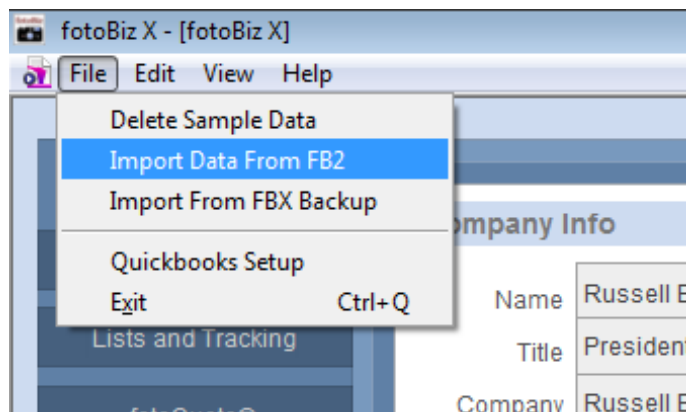


## Step Three: Importing Converted Data to FBX

To import your converted fotobiz 2 files into fotoBiz X, open fotoBiz X and click the Setup button on the lower left of the screen

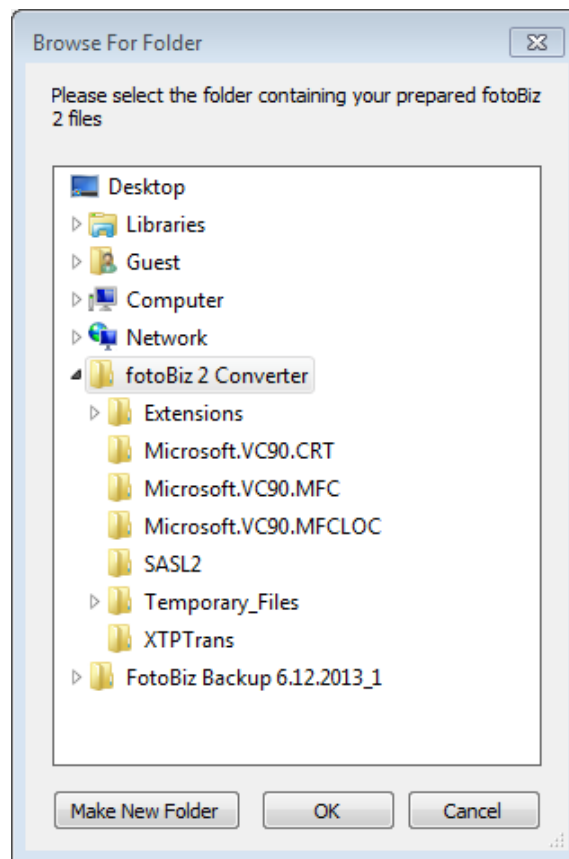


From the Menu Bar select File > Import from FB2



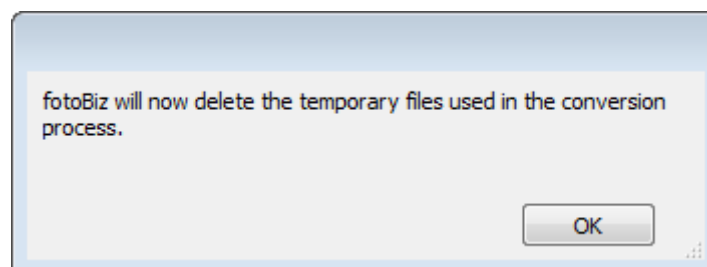
You will be asked to navigate to the folder containing the converter application. This is the fotoBiz 2 Converter file you downloaded at the beginning of this process. If you moved the file from your downloads to your desktop as instructed, you will find this folder on your desktop. **REMEMBER: YOU ARE CHOOSING THE FOTOBIZ 2 CONVERTER FOLDER!**

Once located, select the OK button.



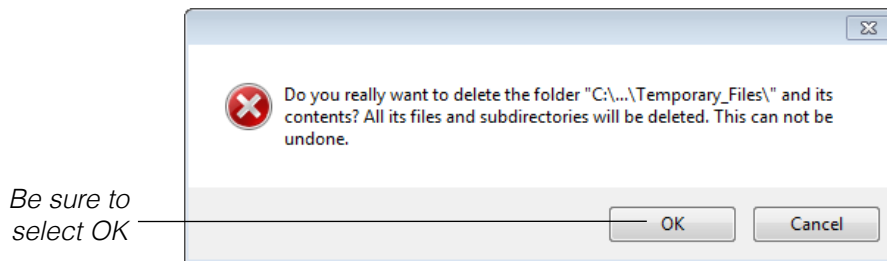
fotoBiz X will import the converted data and a series of dialog boxes will appear. The first will inform you that the temporary files used in the conversion will be deleted.

Click OK

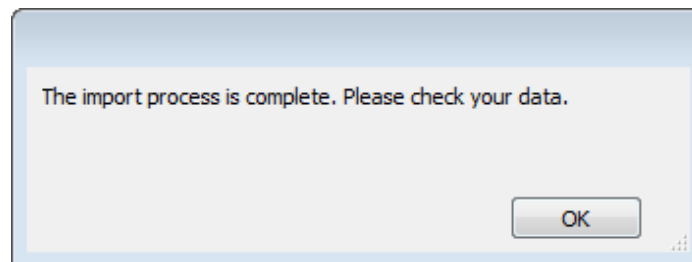


The next dialog box will confirm that you really want to delete these temporary files.

Click OK



The final dialog box you see should confirm that the import process is complete.



When checking your data, make sure that your document sequencing (e.g., invoices) is picking up where it left off in fotoBiz 2. It is also a good idea to make a backup once this process is complete.

Keep in mind that we have a user's guide available to help you shorten the learning curve of the fotoBiz X upgrade. Not only is the interface completely different, we have included many enhancements and new features.

The latest version of fotoQuote (Pro 6) is built into the program so you will no longer need to reference the fotoQuote Pro 6 pricing outside of the fotoBiz program.

To download the fotoBiz X User's Guide go to, <http://www.cradocfotosoftware.com/downloads/manuals/fotoBiz-X-User-Guide.pdf>