Converting All Orders from V3 to V6

This guide consist of three parts I. Conversion Procedure, II Conversion Tips (preconversion considerations) and III. Conversion Expectations Guidelines (what to expect after converting)

I. CONVERSION PROCEDURE

Open All Orders 6, do File -> Open Company, enter the old version 3 xxxx.ncb file and then click on next, (THIS APPLIES TO EITHER THE SQL OR THE ACCESS VERSION OF ALLORDERS 3); keep in mind that in the sql version of AllOrders 3, even when select an ncb MS Access file, this is only a dummy file. The real sql version database of AllOrders 3 is accessed by the program automatically by the settings on the registry. HKEY_LOCAL_MACHINE -> Software -> Numbercruncher. The registry setting should be pointing to the actual database. the CONVERSION WIZARD WILL BE TRIGGERED. The Wizard will try connecting to the open QB file, then the Wizard will ask you where you want the NEW DATABASE to be created and on which Server. If the Server is not your local machine, then the directory selected must be found thru the NETWORK NEIGHBORHOOD...that is thru a network file path. The new files should reside on the root drive of the server. All of this information can be set by clicking on ADVANCE on the Wizard panel.

On the ADVANCE button, when clicked, there will be 4 fundamental questions that must have an answer prior to proceeding:

1) The name of the new database pointer file (NCD) . This is only a pointer to the actual database and this is the file that will be used to open the database from the workstations.

2) The Server Name/Instance, it should be something like Serverxxx/AllOrders

3) The name of the ACTUAL DATABASE this is the SQL Server database file and it should be named something like mymaindatafile.mdf

4) The user name and password for SQL Server instance. This should ALWAYS be
User Name: sa
password: sysadmin
timeout = 120 or greater

II.CONVERSION TIPS

All Orders V6 will automatically update version 3.1.36 or higher. If you are currently using version 1.x version 2.x, you must first install and run version 3.1.36

Prior to converting make sure that:

1) Make sure all UOM's used in previously closed transactions are still defined.
2) Make sure that for any Customers or Vendors, all have validly defined addresses, if any addresses were used in previous transactions and then removed, the same as with item 1) above it is going to cause a Foreign Key Violation error.
3) Make sure you synchronize with QB prior to the Conversion

All Orders V6 has numerous new features that will significantly improve efficiency however the user interface has

changed and you will need to re-learn some portions of the system. Therefore consider the following suggestions before converting:

1. Do not convert during your busy season convert when your staff has the time to install and learn the system
2. Schedule training
3. Do a test conversion
4. Run version 3 and version 5 in parallel

III. CONVERSION EXPECTATION GUIDELINES

Data that will be converted

Most of your data will be imported to All Orders 4 without difficulty. However, please note the following exceptions and special circumstances

1. RFPs are not supported and will not be imported.
2. RMAs are no longer supported in All Orders. RMA is now handled through a Customer Return which is 'Unshipped'. You can quickly re-enter the RMAs by going to the underlying Ship Doc and clicking Return.
3. The Bill of Materials is part of the item. To see only your BoMs, filter the Item list for Item Group Short = BOM
4. The Available iin All Orders 3 was QuickBooks On Hand +/- 'Timing Difference' while in All Order 4 it is based on the Location quantity; meaning only the transactions that are posted through All Orders.
5. Work Orders no longer have Customer information.
For Work Orders that have been invoiced, a Ship Doc is created. For un-invoiced Work Orders, a Sales Order gets created. The old Work Order # can now be found in a memo field of the Ship Doc or Sales Order. (Note: If the an un-open Work Order does not have 'Enable Invoicing' then a sales order will not be created)
6. Work Orders no longer have multiple lines. As a result, separate Work Orders are created for each line of the old Work Order.
7. In version 6, making ad hoc lot or serial # entries was made with the Lot / Serial # entry screen. In version 5, ad hoc lot / serial # entries are made using the Qty Adjustment entry screen. Lot and serial # transaction that were made with the lot/serial # entry screen have been converted to Qty Adjustments.
8. One-sided transfers are no longer supported. Old one-sided transfers have been converted to Qty Adjustments and marked as NC Only.
9. Overriding lot or serial # entries is not supported. Instead, a temporary ID number is inserted into the affected transactions.
10. Most reports will be converted with the exception of work order reports.
11. Only the admin user will be converted, other users will have to be re-added.