

APPENDIX E – Sharing HomeTech ADVANTAGE

Data On A Network Or Server (Single-User Version & Multi-User Version)

HomeTech ADVANTAGE Estimating System Version 4.1

This document provides details for the added program features of HomeTech ADVANTAGE Cost Estimator version 4.1. This document is only concerned with the program features that are new to the HomeTech ADVANTAGE 4.1 version of the software, and does not include the program features that have remained unchanged since the HomeTech ADVANTAGE 4.0 version of the program. This document is meant to supplement the existing documentation for the HomeTech ADVANTAGE Estimating software version 4.0.

One of the most beneficial differences between HomeTech ADVANTAGE 4.0 and HomeTech ADVANTAGE 4.1 is that the HomeTech ADVANTAGE 4.1 has networking capabilities, allowing users to share both Estimate and CostBook data on a network or server. The HomeTech ADVANTAGE 4.0 is a Single-User version of the software, and has limited data sharing capabilities. The HomeTech ADVANTAGE 4.1 will be available in two (2) versions as follows: (1) Single-User Version – This version will have limited data sharing capabilities, and (2) Multi-User Version – This version will have networking capabilities.

Another important benefit of the HomeTech ADVANTAGE 4.1 is that users will be able access the HomeTechOnline.net web site, thereby allowing users to update their accounts and to receive program downloads and program updates while online. This will allow for more payment options, greater flexibility in obtaining the program or program updates via online downloads, and provide a higher standard of customer support to the user.

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MULTI-USER UPGRADE

(Upgrading The Single-User Version Of The Program To The Multi-User Version Of The Program)

This section applies to users who have already installed the HomeTech ADVANTAGE Cost Estimator Single-User version of the program on their computer(s). This means the user originally purchased a one (1) seat license, has since purchased a multi-seat license, and is now ready to upgrade their single-user program(s) to the multi-user version. The multi-seat license will allow multiple users to simultaneously share and access the HomeTech ADVANTAGE CostBook and Estimate data from a network or server.

Users wanting to upgrade their HomeTech ADVANTAGE Cost Estimator program (Single-User version to Multi-User version) will need to run the Multi-User Upgrade program (MultiUserUpgrade.exe). The Multi-User Upgrade program (MultiUserUpgrade.exe) will configure the HomeTech ADVANTAGE Cost Estimator 4.1 program to allow multiple users to simultaneously access the same CostBook and Estimate data. This applies to users who have purchased a multi-seat license. The Multi-User Upgrade program can be found in the "HomeTech41" program folder. By default, the Multi-User Upgrade program is located in the following location:

C:\Program Files\HomeTech41\MultiUserUpgrade.exe

NOTE: The Multi-User Upgrade program (MultiUserUpgrade.exe) was not available when the first HomeTech ADVANTAGE Cost Estimator 4.1 installation CD-Rom's were created. Therefore, if you installed the HomeTech ADVANTAGE Cost Estimator 4.1 program from one of these CD-Rom's (Prior to October 2004) you will not find the Multi-User Upgrade program (MultiUserUpgrade.exe) in the "HomeTech41" program folder. If this is the case, please contact HomeTech Information Systems, Inc. – Software Department at 1-888-223-0014 to obtain a copy of the Multi-User Upgrade program.

The Multi-User Upgrade program will automate the upgrade process for users wanting to share their HomeTech ADVANTAGE Cost Estimator (Version 4.1) data on a network or server. During the upgrade process, the user will be prompted to make choices regarding how they want their data to be shared. Also, Single-Users upgrading to Multi-User status will need to enter their new Key Code as well. If you do not have your existing Key Code, or if you have paid for the Multi-User version of the software and not received your new Key Code please contact HomeTech Information Systems, Inc. – Software Department at 1-888-223-0014 to obtain your Key Code.

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(Upgrading The Single-User Version Of The Program To The Multi-User Version Of The Program)

SETUP CONSIDERATIONS

Several considerations must be made before beginning the upgrade process. These considerations should be made based on personal preferences, network configuration, and estimating style. Refer to the section APPENDIX E - DATA SHARING CONSIDERATIONS for more information regarding sharing the HomeTech ADVANTAGE Cost Estimator data.

- 1. The user must select the first computer in the upgrade process based on the CostBook data to be shared on the network or server.** The “first” computer in the upgrade process will provide all CostBook data and LogIn Users for all subsequent installations (Refer to APPENDIX E – Data Sharing Considerations – Sharing Summary). The Multi-User Upgrade program (MultiUserUpgrade.exe) will not merge the CostBook data from multiple computers into a single shared CostBook file. Therefore, the user may need to transfer data from one computer to another at some point in the Multi-User Upgrade process. Examples of where the user may need to transfer data include (I) Moving the CostBook data from a computer not linked to the network or server to the “first” computer on the network to perform the Multi-User Upgrade, (II) Moving estimates from a computer not on the network to a computer on the network ready to perform the Multi-User Upgrade.
- 2. During the upgrade process, estimates from individual computers will be merged into a single shared estimate file on the network or server** (If the user opted to “Store All Estimates On The Server”). The user will need to choose to “overwrite/not overwrite” estimates with the same estimate titles.
- 3. During the upgrade process, Client Information from individual computers will be merged into a single shared Client Information file on the network or server.**
- 4. The CostBook data will automatically be shared from the server or network drive.** Using the Multi-User Upgrade program, the user does **not** have the option to save/share CostBook data from a computer’s local drive (Example: C:\).
- 5. Using the Multi-User Upgrade program, the user will have the option to share estimate data on a network or server, or to have each computer access their own estimate data from the local drive of each computer.**
- 6. Once the Multi-User Upgrade has been performed on a computer, that computer cannot perform the Multi-User Upgrade again.**

MULTI-USER UPGRADE

*(Upgrading The Single-User Version Of The Program To
The Multi-User Version Of The Program)*

UPGRADE PROCEDURE AND INSTRUCTIONS

Multi-User Upgrade

Select network drive.
Enter your key code.
Indicate your duplicate estimate preference.
Click on 'Start' to begin the process.

Store all estimates on the server
 Store all estimates on local hard drives

F:\ Network Drive

Key Code
1234 - ABC123XYZ

Indicate how you want to handle duplicate estimates.

How do handle duplicate estimates

Ask each time a duplicate estimate is found.
 Do NOT over write any estimates
 Over write all duplicate estimates

Start Exit

To upgrade your HomeTech ADVANTAGE Cost Estimator program (Single-User version) to the HomeTech ADVANTAGE Cost Estimator program (Multi-User version), complete the following procedure:

1. **Choose the computer on your network or server to be the “first” upgrade. Choose the computer that has the CostBook data you want to share with all subsequent upgraded computers.** Refer to “Setup Considerations” for more information.

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**(Upgrading The Single-User Version Of The Program To
The Multi-User Version Of The Program)**

2. **RUN the Multi-User Upgrade program (MultiUserUpgrade.exe)** to display the “Multi-User Upgrade” window. (Choose the START menu from your DeskTop. Choose the BROWSE button. “Look In” your LOCAL DISK C:\. Double-click on the PROGRAM FILES folder. Double-click on the HOMETECH41 program folder. Double-click on MULTIUSERUPGRADE.EXE. Click OK in the “Run” window).
3. **In the “Multi-User Upgrade” window, choose to either STORE ALL ESTIMATES ON THE SERVER or choose to STORE ALL ESTIMATES ON THE LOCAL HARD DRIVES** (Refer to “Setup Considerations” for more information).
4. In the “Multi-User Upgrade” window, you will see a list of your available network or server drives in the large white box. **Choose/Highlight the available drive from which you want to share the HomeTech ADVANTAGE Cost Estimator program data.** The chosen drive will be the drive to which all subsequent upgraded computers will access the HomeTech ADVANTAGE Cost Estimator program data.
5. **In the “Multi-User Upgrade” window, enter your new KEY CODE in the boxes provided** (The first 4 digits in the first box, and the last 9 digits in the second box. You do not need to enter the hyphen (-) when entering your Key Code. The Key Code is not case-sensitive).
6. **In the bottom of the “Multi-User Upgrade” window, choose how to handle estimates with the same Estimate Title.** Chose one of the three available options.
7. **Once all selections have been made in the “Multi-User Upgrade” window, choose START** to begin the upgrade process, or choose CANCEL to cancel the upgrade process.
8. **Repeat this same procedure for all computers with which you want to share data.**

SINGLE-USER UPGRADE

(Sharing Data On Multiple Computers On A Single-User Version Of The Program)

This section applies to users who have already installed the HomeTech ADVANTAGE Cost Estimator Single-User version of the program on their computer(s). This means the user purchased a one (1) seat license, and is now ready to upgrade their single-user program(s) so that all of the HomeTech ADVANTAGE Cost Estimator 4.1 programs share and access the same CostBook and/or Estimate data. The limitation with the single-user version of the program (one seat license) is that, regardless of how many single-user computers are sharing the data, only one (1) copy of the HomeTech ADVANTAGE Cost Estimator 4.1 program can be open at any given time. This concept applies when sharing the HomeTech ADVANTAGE CostBook data only.

Single-Users of the HomeTech ADVANTAGE Cost Estimator program will need to run the Multi-User Upgrade program (MultiUserUpgrade.exe). The Multi-User Upgrade program (MultiUserUpgrade.exe) will configure the HomeTech ADVANTAGE Cost Estimator 4.1 program to allow multiple computers to access the same CostBook and /or Estimate data. The main difference between Single-User data sharing and the Multi-User data sharing is that the Single-User version can only have one (1) copy of the program open at any given time (When sharing the CostBook data with a one-seat license). The Multi-User Upgrade program can be found in the "HomeTech41" program folder. By default, the Multi-User Upgrade program is located in the following location:

C:\Program Files\HomeTech41\MultiUserUpgrade.exe

NOTE: The Multi-User Upgrade program (MultiUserUpgrade.exe) was not available when the first HomeTech ADVANTAGE Cost Estimator 4.1 installation CD-Rom's were created. Therefore, if you installed the HomeTech ADVANTAGE Cost Estimator 4.1 program from one of these CD-Rom's (Prior to October 2004) you will not find the Multi-User Upgrade program (MultiUserUpgrade.exe) in the "HomeTech41" program folder. If this is the case, please contact HomeTech Information Systems, Inc. – Software Department at 1-888-223-0014 to obtain a copy of the Multi-User Upgrade program.

The Multi-User Upgrade program will automate the upgrade process for users wanting to share their HomeTech ADVANTAGE Cost Estimator (Version 4.1) data on a network or server. During the upgrade process, the user will be prompted to make choices regarding how they want their data to be shared. Also, Single-Users upgrading to Multi-User status will need to enter their new Key Code as well. If you do not have your existing Key Code, or if you have paid for the Multi-User version of the software and not received your new Key Code please contact HomeTech Information Systems, Inc. – Software Department at 1-888-223-0014 to obtain your Key Code.

SINGLE-USER UPGRADE

(Sharing Data On Multiple Computers On A Single-User Version Of The Program)

SETUP CONSIDERATIONS

Several considerations must be made before beginning the upgrade process. These considerations should be made based on personal preferences, network configuration, and estimating style. Refer to the section APPENDIX E - DATA SHARING CONSIDERATIONS for more information regarding sharing the HomeTech ADVANTAGE Cost Estimator data.

- 1. The user must select the first computer in the upgrade process based on the CostBook data to be shared on the network or server.** The “first” computer in the upgrade process will provide all CostBook data and LogIn Users for all subsequent installations (Refer to *APPENDIX E – Data Sharing Considerations – Sharing Summary*). The Multi-User Upgrade program (MultiUserUpgrade.exe) will not merge the CostBook data from multiple computers into a single shared CostBook file. Therefore, the user may need to transfer data from one computer to another at some point in the Multi-User Upgrade process. Examples of where the user may need to transfer data include (I) Moving the CostBook data from a computer not linked to the network or server to the “first” computer on the network to perform the Multi-User Upgrade, (II) Moving estimates from a computer not on the network to a computer on the network ready to perform the Multi-User Upgrade.
- 2. During the upgrade process, estimates from individual computers will be merged into a single shared estimate file on the network or server** (If the user opted to “Store All Estimates On The Server”). The user will need to choose to “overwrite/not overwrite” estimates with the same estimate titles.
- 3. During the upgrade process, Client Information from individual computers will be merged into a single shared Client Information file on the network or server.**
- 4. The CostBook data will automatically be shared from the server or network drive.** Using the Multi-User Upgrade program, the user does not have the option to save/share CostBook data from a computer’s local drive (Example: C:\).
- 5. Using the Multi-User Upgrade program, the user will have the option to share estimate data on a network or server, or to have each computer access their own estimate data from the local drive of each computer.**
- 6. Once the Multi-User Upgrade has been performed on a computer, that computer cannot perform the Multi-User Upgrade again.**

SINGLE-USER UPGRADE

(Sharing Data On Multiple Computers On A Single-User Version Of The Program)

UPGRADE PROCEDURE AND INSTRUCTIONS

Multi-User Upgrade

Select network drive.
Enter your key code.
Indicate your duplicate estimate preference.
Click on 'Start' to begin the process.

Store all estimates on the server
 Store all estimates on local hard drives

F:\ Network Drive

Key Code
1234 - ABC123XYZ

Indicate how you want to handle duplicate estimates.

How do handle duplicate estimates

Ask each time a duplicate estimate is found.
 Do NOT over write any estimates
 Over write all duplicate estimates

Start Exit

To upgrade your HomeTech ADVANTAGE Cost Estimator program (Single-User version) to allow multiple single-user computers to share and access the same HomeTech ADVANTAGE data, complete the following procedure:

1. **Choose the computer on your network or server to be the “first” upgrade. Choose the computer that has the CostBook data you want to share with all subsequent upgraded computers.** Refer to “Setup Considerations” for more information.

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2. **RUN the Multi-User Upgrade program (MultiUserUpgrade.exe)** to display the “Multi-User Upgrade” window. (Choose the START menu from your DeskTop. Choose the BROWSE button. “Look In” your LOCAL DISK C:\. Double-click on the PROGRAM FILES folder. Double-click on the HOMETECH41 program folder. Double-click on MULTIUSERUPGRADE.EXE. Click OK in the “Run” window).
3. **In the “Multi-User Upgrade” window, choose to either STORE ALL ESTIMATES ON THE SERVER or choose to STORE ALL ESTIMATES ON THE LOCAL HARD DRIVES** (Refer to “Setup Considerations” for more information).
4. In the “Multi-User Upgrade” window, you will see a list of your available network or server drives in the large white box. **Choose/Highlight the available drive from which you want to share the HomeTech ADVANTAGE Cost Estimator program data.** The chosen drive will be the drive to which all subsequent upgraded computers will access the HomeTech ADVANTAGE Cost Estimator program data.
5. **In the “Multi-User Upgrade” window, enter your new KEY CODE in the boxes provided** (The first 4 digits in the first box, and the last 9 digits in the second box. You do not need to enter the hyphen (-) when entering your Key Code. The Key Code is not case-sensitive).
6. **In the bottom of the “Multi-User Upgrade” window, choose how to handle estimates with the same Estimate Title.** Chose one of the three available options.
7. **Once all selections have been made in the “Multi-User Upgrade” window, choose START** to begin the upgrade process, or choose CANCEL to cancel the upgrade process.
8. **Repeat this same procedure for all computers with which you want to share data.**

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(Sharing Data On Multiple Computers On A Single-User Version Of The Program)

DATA SHARING CONSIDERATIONS

GENERAL CONSIDERATIONS

This section contains information regarding the HomeTech ADVANTAGE data folders and files, and their setup when initially installing the HomeTech ADVANTAGE Cost Estimator 4.1 program using the install CD-Rom. Although, this section explains concepts related to the installation of the program, an understanding of where data is saved will allow the user to make important data sharing decisions when completing the “Multi-User Upgrade” process.

There are three areas for consideration in regards to program setup and sharing data files. How you install and access these files should reflect the needs of your company and its estimators. The areas to consider are as follows:

1. DESTINATION FOLDER

The Destination Folder is the program folder created during the program install process. This folder is named “HomeTech41” and contains the program executable, amongst other files required for the program to function. The program itself is accessed and executed from this folder. This folder must be located on a local drive for each computer (Example: C: drive or M:\ drive). Each computer must have it’s own destination folder on a local drive. By default the destination folder is:

C:\Program Files\HomeTech41

Unless you have specific preference to a different location for the Destination Folder, it is recommended you simply use the default location during installation. The location of the Destination Folder can be changed in the “Destination Folder” window during the installation of the program.

2. COSTBOOKS FOLDER

The CostBooks Folder is a folder that contains the data regarding the four HomeTech ADVANTAGE Costbooks (Remodeling & Renovation, Kitchen & Bath, Handyman, and HouseBuilders). This includes any custom items and custom assemblies you have created in the databases, as well as any modifications you made to the default line items and default assemblies. The Costbooks Folder contains your client database, which saves all your client information. The Costbooks Folder also contains the forms from the Contract Writer, including any custom forms or modifications you have added.

During installation of the program, you will be prompted to choose the location on your network or server where you want to store your CostBook data. Having the ability to share the HomeTech CostBook data on a network or server will allow multiple estimators to simultaneously access the same group of cost data. By default during installation, the install routine will automatically search for and locate your server or network drive. If you want to change the location of the CostBook Folder, choose the

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CHANGE button. **Unless you have specific preference to another location, it is recommended you use the default location.**

The typical setup location for the CostBooks Folder accessed from the local drive of a computer (a setup where CostBook data is not shared) is as follows:

C:\Program Files\HomeTech41\CostBooks

Where the C:\ represents a local drive found on the computer.

The typical setup location for the CostBooks Folder accessed from a network or server (a setup where CostBook data is shared) is as follows:

Z:\HTData\CostBooks

Where Z:\ represents a network drive or server drive.

3. ESTIMATES FOLDER

The Estimate Folder is a folder that contains the data regarding any estimate(s) you may have created. The Estimates Folder also contains your Cover Page information, to include your default cover page as well as the cover pages for individual estimates. Also included in the Estimates Folder is a subfolder named EMAIL where, by default, estimates saved as text documents (Rich Text Format) are stored.

During installation of the program, you will be prompted to choose where you want to store your estimate data, either locally on the individual computer or on a network or server. During installation, if you choose STORE ESTIMATES ON LOCAL DRIVE the Estimates Folder on that computer will not be shared. Also, that particular computer will not be able to access any estimates stored on a network or server. During installation, if you choose STORE ESTIMATES ON SERVER, the Estimates Folder will be accessed from the network or server drive. With this setup, all estimate data regarding the Estimates Folder is saved to the user's network or server drive. All users wanting to share data amongst multiple computers should access their data from the same location on the network or server. With this configuration, the user will have access to estimates created from other computers (with the same setup). **Even though multiple computers may simultaneously have access to the same estimate data, only one user can open any given estimate at any given time.**

The typical setup location for the Estimates Folder accessed from the local drive of a computer (a setup where estimate data is not shared) is as follows:

C:\Program Files\HomeTech41\Estimates

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Where the C:\ represents a local drive found on the computer.

The typical setup location for the Estimates Folder accessed from a network or server (a setup where estimate data is shared) is as follows:

Z:\HTData\Estimates

Where Z:\ represents a network drive or server drive.

SHARING SUMMARY

The HomeTech ADVANTAGE 4.1 Cost Estimator Multi-User software allows the user to share and access estimates, CostBook data, client information, and various documents from a network or server location. At the same time, a user is able to customize the settings of their HomeTech ADVANTAGE 4.1 Cost Estimator Multi-User program on their individual computer to meet their needs and estimating style. The following list summarizes the sharing capabilities of the HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User program.

	AREA OF PROGRAM	SAVED IN	SHARE DATA ON NETWORK?
1	User Created Estimates	Estimates Folder	YES
2	HomeTech CostBooks	CostBook Folder	YES
3	Custom CostBook Items	CostBook Folder	YES
4	Assembly Database	CostBook Folder	YES
5	Client Information	CostBook Folder	YES
6	LAMI Areas & Data	LAMI Folder	YES
7	Contractor Information (Utilities pull-down-Setup)	NA	YES
8	Contract Forms (Custom & Default)	CostBook Folder	YES
9	User Created Division Titles	NA	YES
10	User Created Phase Names	NA	YES
11	Default Program Markups (Utilities pull-down-Setup)	NA	YES
12	Estimate Grid Layout	NA	NO
13	Program Preferences (Utilities pull-down-Setup)	NA	NO
14	Database Defaults (Utilities pull-down-Setup)	NA	NO

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(Upgrading The Single-User Version Of The Program To The Multi-User Version Of The Program)

BACKUP AND RESTORE DATA

SAVE INDIVIDUAL ESTIMATE (SEND Feature)

This backup procedure is used to transfer a single estimate from one computer into another computer (with the same version of the HomeTech ADVANTAGE Cost Estimator). Complete the following steps to make a backup of an individual estimate:

1. Open the HomeTech ADVANTAGE Cost Estimator program.
2. Open the estimate you wish to save (Choose FILE, choose OPEN).
3. Choose the FILE pull-down menu.
4. Choose SEND. This will open the "Send Estimate To" window.
5. Choose the DRIVE and FOLDER (if applicable) where you want to save this estimate. When selecting a particular folder to save in, be sure to open the folder by double-clicking on it.
6. Once a location has been selected, choose SAVE.

RESTORE INDIVIDUAL ESTIMATE (IMPORT Feature)

This procedure is used to restore a single estimate file (from a single estimate backup) into the HomeTech Advantage Cost Estimator. To restore a single estimate file into the HomeTech ADVANTAGE Cost Estimator complete the following procedure:

1. Open the HomeTech Advantage Cost Estimator program. Do not open an estimate.
2. Choose FILE pull-down menu.
3. Choose IMPORT.
4. The "Import From" window will appear. BROWSE to the location where you saved your Individual Estimate Backup file.
5. Choose/Highlight the ESTIMATE BACKUP FILE name.
6. Choose OPEN to import the estimate. Choose CANCEL to cancel the import process.
7. Choose OK in the "Import Complete" window.

Your estimate is now restored to the HomeTech Advantage Cost Estimator.

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BACKUP ENTIRE PROGRAM (DATA BACKUP Feature)

This backup procedure will create a complete backup of all HomeTech ADVANTAGE program data to include all user created data. By default, this method creates a backup file named HTDATAZIP.ZIP, or the user can rename the backup file to a name of their choice. **This backup file contains all of the HomeTech ADVANTAGE user created data (Estimates, user created cost data to include custom line items and assemblies, contracts, and client data).** Complete the following steps to backup all HomeTech ADVANTAGE Cost Estimator data:

1. Open the HomeTech Advantage Cost Estimator program. Do not open an estimate.
2. Choose the FILE pull-down menu.
3. Choose DATA BACKUP. This will open the Backup Data screen.
4. In the "Backup To Drive" box, choose the DRIVE LETTER of the drive where you want to save the backup file.
5. In the "Drive Folders" box, browse to the location where you want to save the backup file. Do this by opening/double-clicking on the folders in the "Drive Folders" box. Open/Double-click on the folder where you want to save the backup file.
6. Once you have selected the location for your backup file, you now have the option to select a name for your backup file (**The default name is HTDatazip.zip**). If you already have existing backup file(s) in this location, they will appear in the "Files" box. At this point, enter a backup file name in the "Backup File Name" box or simply use the default backup name. If you want to overwrite an existing backup file already in this location, simply highlight the backup name in the "Files" box and this backup name will automatically be placed in the "Backup File Name" box. **Do NOT use any "weird" characters or punctuation in the backup file name. Use only alphabetical or numerical characters.**
7. Choose START BACKUP to begin the data backup.
8. Once the backup is complete, choose EXIT to exit the "Data Backup" screen.

NOTES: Data should only be restored to the same version of the program that the backup file was created in. As an example, a backup file created from the HomeTech ADVANTAGE Cost Estimator 4.1 program can **only** be restored into the HomeTech ADVANTAGE Cost Estimator 4.1 version of the program.

The user can restore their data directly from a CD-Rom drive.

Do NOT use any "weird" characters or punctuation in the backup file name. Use only alphabetical or numerical characters.

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RESTORE ENTIRE PROGRAM (DATA RESTORE Feature)

To restore all program data into the HomeTech Advantage Cost Estimator complete the following procedure:

1. OPEN the HomeTech Advantage Cost Estimator program. Do not open an estimate.
2. Choose FILE pull-down menu.
3. Choose DATA RESTORE.
4. The "Restore Data" window will display. From the "Restore From" box, select the DRIVE LETTER of the drive where the backup file is located.
5. In the "Folders" box, browse to the location where you want to restore the backup file from. Do this by opening/double-clicking on the folders in the "Folders" box. Open/Double-click on the folder where the backup file is saved.
6. Once you have selected the location of your backup file, the available backup file names will appear in the "Files" box. In the "Files" box, double-click on the backup file name you want to restore. At this point, the backup file name will appear in the "Restore File Name" box.
7. Choose START RESTORE to restore your data to the HomeTech Advantage Cost Estimator. Choose CANCEL to abort the restore process.
8. Choose OK to the Restore Completed window.
9. Choose EXIT to exit the Restore Data window.
10. Your data is now restored to the HomeTech Advantage Cost Estimator.

NOTES: Data should only be restored to the same version of the program that the backup file was created in. As an example, a backup file created from the HomeTech ADVANTAGE Cost Estimator 4.1 program can **only** be restored into the HomeTech ADVANTAGE Cost Estimator 4.1 version of the program.

The user can restore their data directly from a CD-Rom drive.

Do NOT use any "weird" characters or punctuation in the backup file name. Use only alphabetical or numerical characters.

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(Sharing Data On Multiple Computers On A Single-User Version Of The Program)

MANUALLY BACKUP AND RESTORE DATA

The instructions in this section are meant to be an overview of the process required to complete a manual backup and restore. The individual steps in this process will not be covered in detail, due to the variety of operating systems and software on the market and the end result of the user. If you are unfamiliar with moving files and folders, it is recommended you call HomeTech Information Systems, Inc. – Software Department at 1-888-223-0014 for further assistance.

To complete a manual backup and restore, you should use some form of “File Management” program (Windows Explorer, “My Computer”, File Manager, etc.). A manual backup/restore requires that you “Copy” the CostBooks Folder and/or Estimates Folder from one location, and “Paste” these folders to another location.

When completing a manual backup of the HomeTech data, there are two (2) data folders that are of importance:

- 1. ESTIMATE FOLDER** – The Estimate Folder contains your created estimates, your cover page modifications (if any), and a subfolder named Email which contains your saved Rich Text Format (RTF) files (if any).
- 2. COSTBOOKS FOLDER** – The Costbooks Folder contains all database information (Custom items, Item Modification, etc.), Contract Writer forms, and your client database.

By default, the CostBooks folder and Estimates folder are located in the following location on your computer:

1. SINGLE-USER VERSION

C:\Program Files\HomeTech41\CostBooks
C:\Program Files\HomeTech41\Estimates
(Where C:\ is the local drive for a given computer)

2. MULTI-USER VERSION

Z:\HTData\CostBooks
Z:\HTData\Estimates
(Where Z:\ is the network or server drive)