



CruisePak

Version 3.5 and Version 3.4.9002 Upgrade Instructions

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CruisePak 3.6 Upgrade Instructions (From CruisePak Versions 3.5 and 3.4.9002)

CruisePak is a multi-user, network ready customer relationship management system that supports the handling of a travel agency's cruise, tour, and general travel bookings. This document addresses the steps necessary to upgrade your CruisePak Version 3.5 or CruisePak Version 3.4.9002 software to CruisePak Version 3.6 software.

1. What Is Upgrading

Upgrading means that you are a current user of CruisePak version 3.5 and/or version 3.4.9002 and you wish to begin using the CruisePak Version 3.6 software. Upgrading also means that you want to transfer your existing customer data, bookings, etc. from CruisePak version 3.5 and/or version 3.4.9002 over to CruisePak version 3.6 so that you do not lose any data.

2. Who Should Upgrade.....(And Who Should Not)

CruisePak Registrations are on a per computer basis. All Users with currently installed and licensed (not trial) versions of CruisePak 3.5 or 3.4.9002 are eligible for upgrade. However, if you meet any of the conditions below, it is recommended that you hold off a bit longer before upgrading.

- a. If you use the general ledger in CruisePak, i.e. you make general journal entries, run income statements, run balance sheets, reconcile your checkbook, etc., it is recommended that you do not upgrade at this time.
- b. If you use the inventory manager, i.e. you have block space allocated and you are currently involved in managing a large group, it is recommended that you do not upgrade at this time.
- c. If you have any customized extensions to the CruisePak product, it is recommended that you do not upgrade at this time. Customers who have alterations to the core product require detailed attention such that the extensions provided work with the new system. This is on a case by case basis.
- d. If your computer operating system is not Windows XP (all versions) or Windows Vista (all versions). CruisePak Version 3.6 requires at least Windows XP (all versions) as the installed computer operating system.
- e. If your database size is 1.2 Gigabytes or larger, it is recommended that you do not upgrade at this time. You need to move to an SQL Server solution and that will be addressed on a case by case basis

Otherwise, if you do not meet any of the conditions above, you can upgrade your software such that you can begin using CruisePak version 3.6 without losing any data

3. Major Changes From Version 3.5

When upgrading to CruisePak Version 3.6, there are several major changes with which you should be aware. They are presented in the following:

- a. You must be connected to the internet to use CruisePak version 3.6. CruisePak 3.6 now has an online authentication system to ensure authorized access occurs. With internet access being everywhere now...we do not think this to be an issue.
- b. The ability to create general travel groups has been removed. To create land based groups in CruisePak 3.6, one creates a tour booking without the tour detail but with the usual air, car, and hotel that normally comprised the general travel booking. Note that individual general travel bookings are still allowed.
- c. When upgrading, if you currently have customized invoice formats, you will need to re-create these using the Designer utility included in the CruisePak 3.6 software. With CruisePak 3.6, you can design confirmation prints and email templates, quote prints and email format templates, quote request prints and email format templates, invoice print and email format templates and also allows you to customize some of the more common reports that you give the customer.
- d. Invoice customizations, as well as other print / email format customizations, only needs to be done once. There is no longer a need to copy the modified invoice file from one computer to the other computer(s) if you make a change to the invoice design.
- e. A change in Technical Support Policy. Direct email and phone support (unless one has purchased a technical support plan) has been eliminated. To receive free Technical Support for CruisePak 3.6, and any version of CruisePak (past and present) for that matter, one must now submit their messages to the technical support forums. Federal email message archiving guidelines have caused this policy change.
- f. A Privacy Statement now applies to all pfsSoftware products. This is due to the various state and federal laws requiring us to implement a privacy policy. Please refer to the website for the official privacy policy.
- g. A change in the User License Agreement. Upgrading to CruisePak 3.6 causes the terms and conditions associated with previous version products to be superceded by the User License Agreement in version 3.6 of CruisePak.

If having read all that, and you are still onboard, you can and it is recommended to upgrade to CruisePak Version 3.6.

4. Upgrade Pricing

Upgrading to CruisePak version 3.6 from CruisePak version 3.5 and/or CruisePak version 3.4.9002 is by definition NOT a free upgrade. However, we do offer free upgrade periods in order to support our current user base.

Users of CruisePak Version 3.4.9002 and/or CruisePak Version 3.5 can upgrade to CruisePak Version 3.6 For FREE as long as the upgrade is done before 12/20/2008.

We believe that this is a fair policy and in actuality exceeds that of the industry standard. Remember, it still costs you money to upgrade from Office 2003 to Office 2007, even though you are a previous Office licensee. The same logic applies to CruisePak, however, we offer a free upgrade period. Most other software businesses do not. Please see the Purchase area of the website for more detailed information.

5. Single User Upgrade Instructions

If you are a single user of CruisePak (not networked), then please refer to the following.

- a. Install CruisePak Version 3.6 on the same computer as exists CruisePak Version 3.5. Perform a normal installation. You can get detailed instructions by referencing the Installation Guide included with the download or on this website.
- b. Start CruisePak and then select the *Help* Menu item and then the *Go to Online Registration* submenu item. You will transition to the registration area of the cruisepak website.
- c. Register and Confirm the product as so instructed.
- d. Exit out of CruisePak.
- e. Restart CruisePak and then select the *Help* Menu item and then the *Go to Online Registration* submenu item. You will transition to the registration area of the cruisepak website.
- f. Click on the *Upgrade CruisePak 3.5 Registration* link. It is on the left hand side of the page.
- g. Perform the steps as indicated on the *Upgrade CruisePak 3.5 Registration* page. Upon completion, we will review the registration and update your CruisePak 3.6 registration accordingly.
- h. Exit out of CruisePak.
- i. Back on your computer, Run the *CruisePak Migration Utility*. It is located under the CruisePak 3.6 Start Menu folder. This application will take all the information in your CruisePak 3.5 database and transfer it to CruisePak 3.6 database.
- j. After completion of the Migration Utility, you may begin using CruisePak v3.6.

Note. Until the CruisePak 3.6 registration has been modified by us to be flagged as Licensed, then the software will be in trial mode...and there are limits to what you can and cannot do in Trial mode in version 3.6. Our suggestion is to make sure the software is fully licensed before making modifications. You can see the license status right on the client screen in CruisePak v3.6.

Note. After you transfer your CruisePak data from version 3.5 to version 3.6, if you enter anything in using version 3.5, it will not show up in 3.6...and vice versa. Thus, we recommend that you only migrate your data when you are confident in and comfortable using CruisePak version 3.6.

6. Network Upgrade Instructions

If CruisePak is installed in a network configuration, that is multiple people use the same CruisePak database at the same time, then please refer to the following as to how to upgrade CruisePak.

- a. Install CruisePak Version 3.6 on the same computer as exists CruisePak Version 3.5. Perform a normal installation. You can get detailed instructions by referencing the Installation Guide

- included with the download or on this website. Note, install CruisePak 3.6 in a network configuration.
- b. Start CruisePak and then select the *Help* Menu item and then the *Go to Online Registration* submenu item. You will transition to the registration area of the cruisepak website.
 - d. Register and Confirm the product as so instructed. You'll need to check your email, etc.
 - e. If you exited out of CruisePak, restart it. Then, select the *Help* Menu item and then the *Go to Online Registration* submenu item. You will transition to the registration area of the cruisepak website.
 - f. Click on the *Upgrade CruisePak 3.5 Registration* link. It is on the left hand side of the page.
 - g. Perform the steps as indicated on the *Upgrade CruisePak 3.5 Registration* page. Upon completion, we will review the registration and update your CruisePak 3.6 registration accordingly.
 - h. Repeat steps (b) - (g) for every computer on the network..

At this point, all workstation software should be upgraded to version 3.6. Now all that is left to do is migrate the CruisePak v3.5 database to the new CruisePak 3.6 database. To migrate the database, please do the following:

- a. Go to the workstation / server that stores the main cruisepak database.
- b. Make sure every user is logged out of CruisePak 3.5 and CruisePak 3.6.
- c. Start the CruisePak Migration Utility. It is located in the CruisePak 3.6 Program folder.
- d. Run the migration by following the screen prompts.

Note. Until the CruisePak 3.6 registration(s) have been modified by us to be flagged as Licensed, then the software on all computers will be in trial mode...and there are limits to what you can and cannot do in Trial mode in version 3.6. Our suggestion is to make sure the software is shows licensed before making modifications. You can see the license status right on the client screen in CruisePak v3.6.

Note. After you transfer your CruisePak data from version 3.5 to version 3.6, if you enter anything in using version 3.5, it will not show up in 3.6...and vice versa. Thus, we recommend that you only migrate your data when you are confident in and comfortable using CruisePak version 3.6.

Note. If you want to run the conversion during business hours, it might be better to make a copy of the CruisePak 3.5 database and place it in a different folder. That way, you can run the conversion while still allowing the agents to have read only access to the CruisePak 3.5 database while the conversion utility is running. In that manner, if a fire drill comes along during the conversion, you can still pull up the records. See the next section for details

7. Converting The Database Offline (Only Applies To Network Upgrade)

The latter half of the instructions involve converting the shared database to the new CruisePak v3.6 format. If you note though, all users must be logged out of CruisePak 3.5 during the conversion process. This is unacceptable if you have a large database due to the downtime the agency will experience.

Thus, to avoid any downtime, it might be better to do the conversion off-line so to speak. In that manner, the CruisePak 3.5 system can still be used (although not modified) and therefore assist in emergency resolutions, etc. To do a conversion off line, please do the following.

- a. In the CruisePak 3.5 shared database folder, there are two files, *crupak34.mdb* and *crupak34.mdw*. Copy these two files to a different folder. Note that the folder should be read/writeable by you.
- b. Start the CruisePak Migration Utility.
- c. When you get to Page 3 of the Migration Utility, note the *CruisePak 3.4/3.5 Database Location* caption. Click the *Change* link and select the *crupak34.mdb* file located in the temporary directory you made in step (a) to hold the database files.
- d. Click the *Migrate* button to begin the conversion process.

Note that the data will begin to be converted. Of course no-one can be using CruisePak 3.6, but you can still use version 3.5; just not make any changes.

8. Other Items Of Concern

Some issues you might have questions on are addressed in the following.

a. How Long Will The Conversion Take?

The conversion takes a while to complete. A database with 100MB of data running on a 750MHZ Windows XP computer with 256MB RAM took 1 hour to complete. Of course, if you have a 1.5 GHZ CPU with 1GB of memory, the time will significantly decrease. We recommend that you do the conversion on the fastest machine possible.

Also note that the database size is that of an optimized database. If you have never optimized your database, your database size will be up to 90% larger than what it actually is. However, you DO NOT have to compress your database before running the conversion. The point of this statement is that database size does not necessarily correspond with the file size listed in Windows Explorer.

b. I Need Help Upgrading and Converting The Database

Please reference the technical support message boards for help. Converting your database is a very straightforward process with minimal user interaction. Also, if you are not comfortable with it, contact a computer professional. They'll be able to get you right up to speed.

c. Do I Have To Upgrade To CruisePak Version 3.6?

No do you not. However, there is a free upgrade period, so there is no expense to you in upgrading. Please see the Purchase Area for when the free upgrade period ends.

d. I Have CruisePak Version 3.3 Or An Older Version Of CruisePak, Can I Convert From That?

We are sorry, but this conversion is only for CruisePak Versions 3.4.9002 and CruisePak Version 3.5.

e. I Use CruisePak Accounting, When Will I Be Able To Convert?

Please contact us directly to discuss this issue. We handle this on a personal basis; in consultation with your accountant.

f. I Use CruisePak Inventory Manager, When Will I Be Able To Convert?

Technically, you can convert right now if you don't have any active inventory your are managing. However, again, this is a case by case basis and we'll consult with you to determine when is the best time to upgrade.

g. I installed CruisePak v3.5 on Windows Vista, When I Tried To Upgrade The License, It Says That I Do Not Have A Valid License.

CruisePak 3.5 works on Windows Vista. However, it is not technically licensed on Vista. That is because CruisePak 3.5 is not certified for use on Windows Vista. Please send contact us to upgrade a Vista Computer from Version 3.5. It is a manual process and we will need to validate your registration on our end.

Note that these are just some of the basic questions. We will modify this document over time as more conversion issues arise.