

## Installing Version 4.3 as Upgrade from 4.2

Before proceeding with any upgrade, you should make a current backup of all SunType program and data files. The following procedure creates an additional copy of the files during the upgrade process. If you wish, you may rely on this procedure as the required backup.

These instructions assume the use of the “standard” SunType directory structure for 4.2, which is a folder named “SunType” containing folders named “Clprogs” and “Cldata”. If you are using different folder names, substitute them as appropriate in the following instructions. It might be a good time to convert to the “standard” folders if you wish.

Upgrading to Version 4.3 from 4.1 or earlier will require that you follow the instructions for upgrading to 4.2 before attempting to upgrade to 4.3.

After making the require backup:

1. Open the SunType folder on your server or local hard drive.
2. Make a copy of the Cldata folder and paste the copy into the same SunType folder.
3. Rename “Clprogs” to “Clprogs.42”. Rename “Copy of Cldata” to “Cldata.42”.
4. Make a new “Clprogs” folder. Open the “Clprogs.43” folder on the CD (early CD’s named it “v4.3b”).
5. Select all of the files and copy them to the empty Clprogs folder on the hard drive.
6. Locate the “42to43.bat” file in the Clprogs folder and double-click it. It will run the data through a brief conversion process to bring the data up to 4.3 standards.
7. **Note:** If you are *not* using the “standard” SunType” folder names, or are running versions of Btrieve called “Brequest” or that require “Btrbox95.Exe” (Windows 98), you’ll need to edit the 42to43.bat file before proceeding to change the “stfiles” setting and/or the version of Btrieve. If you are running SunType’s original Btrieve or Pervasive SQL on Win 2000 or XP, you don’t have to change the Btrieve settings. If you have problems in this area, call for advise.
8. Locate the batch file you’ve been using to start SunType in the “Clprogs.42” folder and move it to the new Clprogs folder. It’s usually called “Runclass.bat”. If it isn’t, you can determine the name of the file you’re looking for by checking the Properties on your desktop shortcut.
9. There is a new SunType icon in version 4.3 named “Stwin.ico” which you may apply to your shortcut if you wish.

When you run SunType for the first time after upgrade, verify that the sign-in and Main Menu screens display Version 4.3 on the screen.

## **FAX and Email Account Information:**

The account record in the new version has fields for storing an account email address and a FAX number for the account. These fields can be included in all user-defined reports, and can be included in the text of ads in the same way as other account fields are accessed.

Due to space limitations in the current screen layout, the Email and FAX fields are not displayed when the account is initially opened on screen. Future modifications of the screen layout are planned, but the basic screen structure is common to several of the data entry screens, so significant reworking is involved.

### **Entering/Changing Email and FAX:**

To display/modify FAX and Email information on existing accounts, choose option "C" to edit the account information while the customer record is displayed on screen.

During new account entry, both fields are visible and accessible while the account is being set up.

### **Using Email and FAX in Ad Entry:**

The Email address and FAX number may be inserted directly into classified ad text using the following keys:

<ALT>-M inserts the Email address.

<ALT>-N inserts the FAX number

These keys are listed, along with other insert options, on the <F8> menu during ad text entry.

Information on using these fields in reports is covered in the section on the Report Generator below.

## Report Generator Changes:

Instructions on the use of the Master Report Generator are contained in Appendix A of the SunType manual, and on the release CD as "Repgen.pdf" in the Stdocs folder. The pdf version is the most current available, so it's generally the one to use.

### FAX and Email Fields:

The new FAX and Email fields in the account records can be reported using the following variables:

<b>Email</b>	<b>String</b>	<b>Email address field from account</b>
<b>FAX</b>	<b>String</b>	<b>FAX number field from account record</b>

Account-based variables are available to all sections of the report generator, so these fields can be called from any report module.

### NoDetail:

Prior to this release, there was no way to extract inactive account records into a list, queue or other report - a prudent step prior to running the "Purge Inactive Accounts" procedure from the Maintenance and Error Recover menu.

Obsolete ad and detail records are purged during the aging process based on user-specified cutoff dates. Once all detail has been removed from an account record by the aging process, indicating no recent activity, it is deemed "inactive" and eligible for purge.

The "Purge Inactive Accounts" process on the Maintenance and Error Recovery Menu allows separate purging of Transient, Long Term and External account types - the intended usage is to change Long Term and External accounts that are to be purged to Transient status to prevent unintended loss of account information.

In this release, a list or queue of inactive accounts can be created for review by running an account-based report with "NoDetail = 1" in the Selection Criteria.

NoDetail is a Boolean variable which returns 1 if true and 0 if false. So, if an account has no remaining detail, it will return a value of 1.

For example, the following line in a report would return a list of inactive Long Term accounts:

```
.SELECT (NoDetail=1)&(Term=1)
```

Like other "lists", inactive accounts may be sent to a queue for on-screen review prior to running the purge function. If an account is to be retained, a Memo detail item can be entered to remove it from inactive status.

A basic sample of an inactive account report is included on the 4.3 release CD in the Etc folder. Copy it to the Cldata folder and look for it in the Account-based report list in the Master Report Generator.

### New Invoice Variables:

SunType's Master Report Generator includes several variables that can be used to report or analyze individual invoice records on Open Item accounts. The existing variables

include Icount, Idue, Icredit, Idebit and Ikind. These are documented in Appendix A of the manual or in the RepGen.pdf included in the Std docs folder on the release CD.

To allow the association of payment and adjustment transactions with specific editions or combinations, the following new variables have been added:

<b>IEditions</b>	<b>Set</b>	<b>Used for testing or selecting the edition(s) included in a specific insertion order-based invoice.</b>
<b>IEditionsList</b>	<b>String (26)</b>	<b>Used to print list of included editions.</b>

In an Open Item system, the lead transaction on most reference documents (invoices) is an insertion order. In fact, it's not possible to add an insertion order to an existing invoice. Payments and adjustments may be entered with their own invoice numbers - the Late Fee and Write-off Small Balances function in the Billing and Aging section of the Main Menu distributes unapplied credits to unpaid invoices with balances.

If you are using edition-specific analysis with these variables, "on account" payments and credit memos will not be reported until they have been applied to open invoices containing an insertion order. You should avoid using "on account" debit memos or miscellaneous charges, since they will not have an insertion order associated with them and, like an insertion order, may be paid by automatic application of a credit to them.

## Re-age Account Balances Utility

This utility was formerly available as a stand-alone function, but has now been added to the Maintenance and Error Recovery Menu (G) for easier access. It can be used to verify and correct anomalies in aging information, or, more commonly, to undo the effects of accidentally running the Account Aging module more than one time at the end of a month.

*Use this utility with caution, and be sure you have a current backup, until you are comfortable with its operation.* However, since it doesn't purge any data the way the regular aging process does, it can be re-run to correct any mistakes.

It operates by re-computing all balances and aging information based on the actual detail stored in the account. All data is considered, whether posted or unposted, when determining the aging status of the account.

This utility is *not applicable* to systems running all accounts on an open-item basis. Open item accounting is specific to the date of the invoice rather than simply using monthly "buckets" as in balance forward accounting.

The effect of this utility is controlled by the system date that you confirm when starting the program. Choosing the appropriate system date is essential to obtaining desired results.

Based on the system date, cutoff dates will be computed for each aging period according to the number of days stipulated in the General Characteristics section of Installation Operations as the billing and aging period. It's normally 30 days, but other intervals such as 7 and 14 days are also possible.

When it is run, the program will treat all transactions occurring in the most recent aging period, as well as any beyond the current date, as "OX", or Current. Each previous aging interval goes in turn into "1X", "2X", "3X" and "4X", indicating the number of times each item has been aged.

The cutoff dates the program will use based on the current system date are displayed prior to beginning the process for your confirmation. Accounts for which changes are made are placed in a queue called "Reaged".

Here's an example of how the choice of system date will affect the results of this program:

If today's date is June 1 and the system date is also June 1, the resulting data will show all May activity as "OX" (Current), as though the May aging has not yet been run. June activity will also be current.

If today's date is June 1 and you set the system date to July 1, the result will show all May activity as "1X" (30 days) and any June activity will be in "OX" (Current). *Be sure you exit and reset the system date prior to doing other work on your data!*

A pdf called Reag42.pdf is included in the Stdocs folder on your release CD. It contains a somewhat more detailed discussion of the re-aging utility.

## **STImport Utility**

STImport is a utility that facilitates importing of account information, ads and payments into SunType Classified for approval and publication. Previously available as a stand-alone program, it can now be run from Maintenance and Error Recovery Menu in SunType.

STImport is typically used to import ads from outside sources, such as web sites, outside databases or other classified systems. It can also be used for Scan ads or any other source provided the ads are put in the proper format.

STImport is used when repetitive imports of ads from specific sources are anticipated, since it does require some setup and testing before use.

As an example, a SunType customer has used STImport to bring in 1200-1500 new rental listings from an agency on deadline each week. The entire processing of the ads for publication requires about 5 minutes to complete.

When used with a web site, the information entered on the web is sent to SunType with the appropriate tags attached to each part of the ad transaction. New accounts are set up as needed, ads are entered into the system and credit card payments, when appropriate, are brought in with the ad copy. All imported data can be queued up for review prior to processing the payment and releasing the ad for publication.

There are a number of components to the initial setup, so detailed information must be obtained from STImp43.pdf, which is included in the stdocs folder on the release CD.

## Special Character Translations

There are a number of characters that cannot be typeset from SunType using direct keyboard input because those characters are reserved for system functions. Prior to the advent of the Web, these keys had little typesetting impact (i.e., the tilde (~) character was rarely used as a stand-alone object prior to the Internet because it was normally combined with another character, as in “ñ”).

SunType solves this problem by substituting other unused character values during ad entry and then translating them to the desired typeset character on output.

Some have been around for quite a while, and a few additional characters have been added lately to allow embedding of HREF codes into ads to create live links in ads sent to the Web.

Here is the list:

Character Desired	ASCII value	Win Char*
<	231	ç
\	221	Ý
^	226	â
{	222	□
	223	□
}	230	μ
~	227	π
>	232	□
"	233	□

\*These characters don't necessarily correspond to what you would get in SunType, which uses a different character complement when editing. Most will produce a Greek character of some kind.

You may choose to employ these characters as needed in SunType macros - this approach is necessary when working with HREF formatting strings. "ASCII" values are entered from the keyboard by holding the <ALT> key down and typing the number on the *numeric keypad*, not on the regular keyboard.

When doing HREF coding for the web, the macros for the print output are set up to use Font 98 {f98}, which is the non-printing (hidden) font in SunType. Examples of this setup are available from SunType support.