

Please call PushMX Technical Support at 877-978-7469 (877-9-PushMX) x2 for any problems or questions.

If you have any of the following configurations you should ***not*** upgrade to PushMX Production 4.0. Instead, please contact PushMX Technical Support.

- If your PushMX Production Server application is installed on a Microsoft Small Business Server
- OR**
- If you are running multiple PushMX Production databases
- OR**
- If you are running a PushMX Communications website
- OR**
- If you are running PushMX Production **Lead Management**

Upgrading the PushMX Production Server application to 4.0

1. Download the upgrade package to the C drive on the server.
2. After downloading, right mouse click on the "PushMX Production 4.0 Upgrade.zip" file and select "Extract All"
3. Select a folder other than the Desktop to extract all the files to
4. Shutdown the PushMX Server application

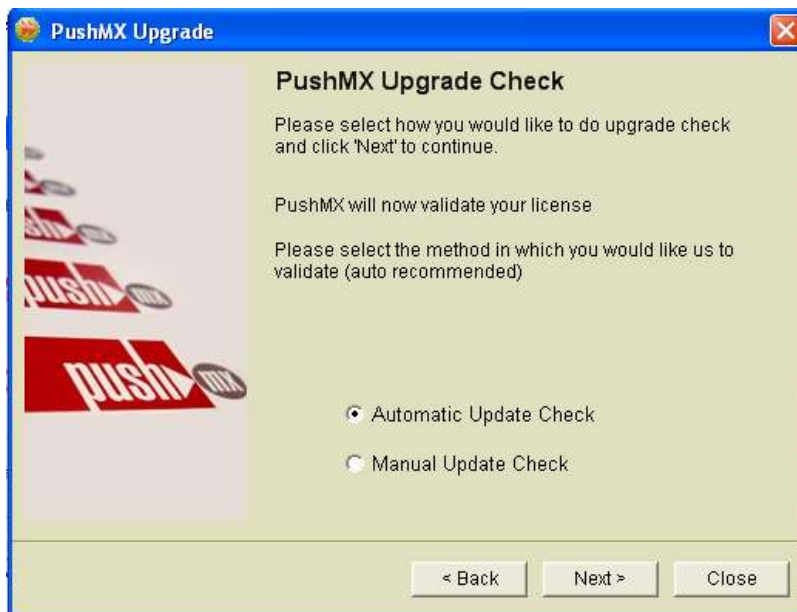
IMPORTANT: Upgrade the PushMX Production Server application first. Do not upgrade the PushMX Clients until the server application has been successfully upgraded.

5. Double click on the "PushMX 4.0 Upgrade" folder created in Step 3
6. Double click on the "config.ini" file. Change: server=ORION To: server=(your actual server name). Save and exit from the config.ini file.
7. Double click on "PushMXUpgrade.exe"

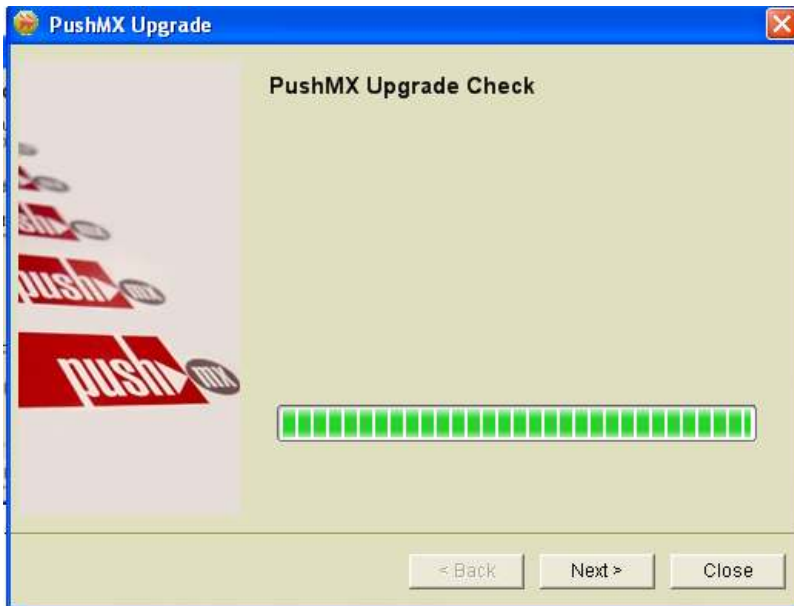
8. Heed (and follow) the red warnings. Verify that the radio button for “Server Side” is selected then click the “Next” button



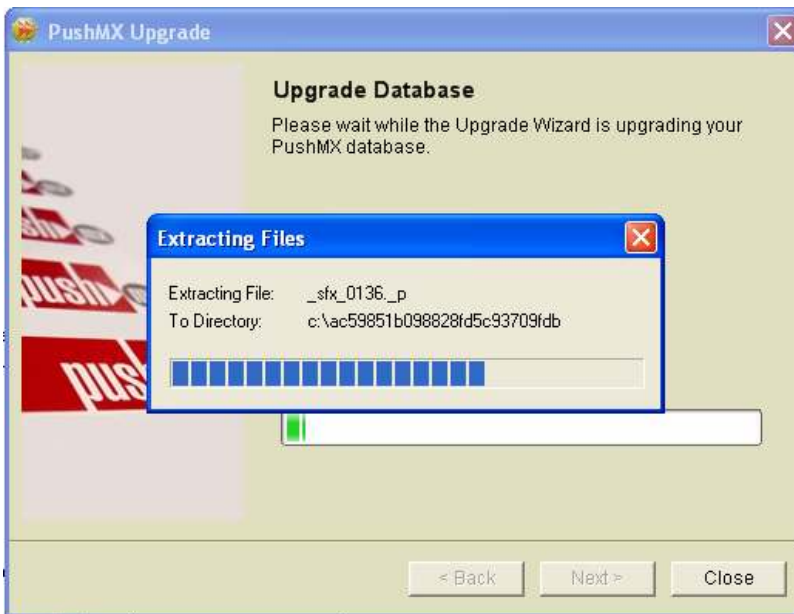
9. Verify that the radio button for “Automatic Update Check” is selected and then click the “Next” button



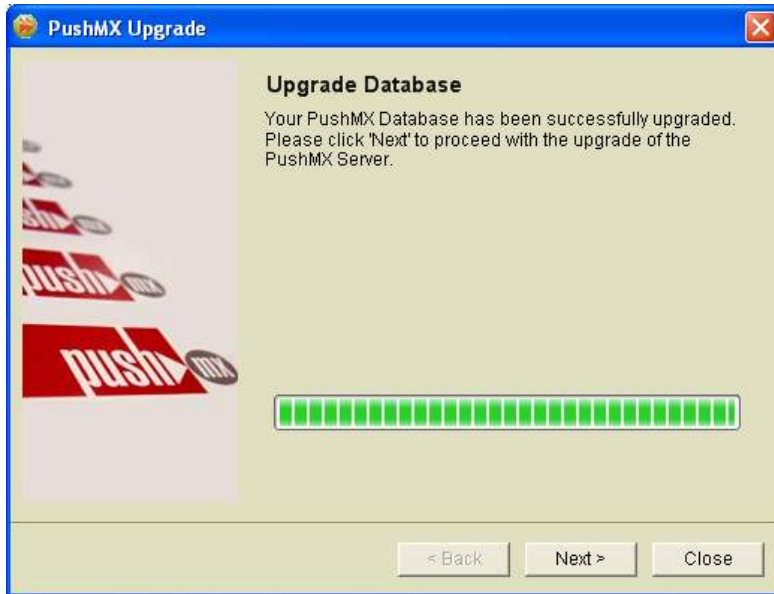
10. Your PushMX Production license will be validated. Once that is finished, click the “Next” button.



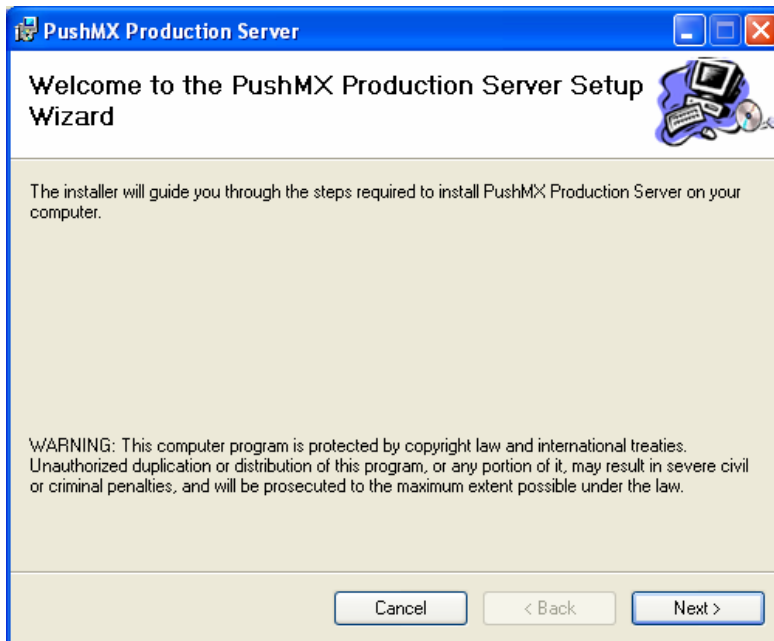
11. The database will now upgrade from Microsoft MSDE to Microsoft SQL Express. This will take several minutes.



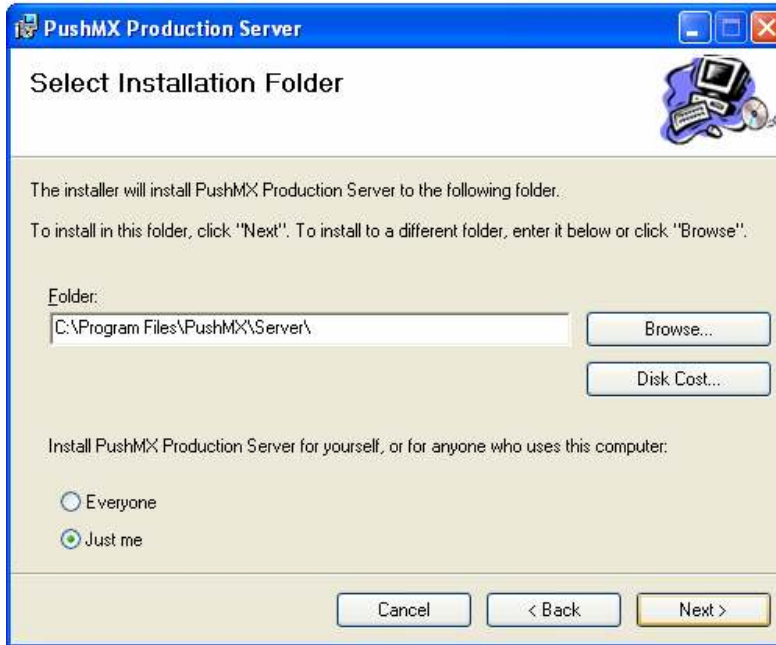
12. Once the database upgrade is complete, click the “Next” button.




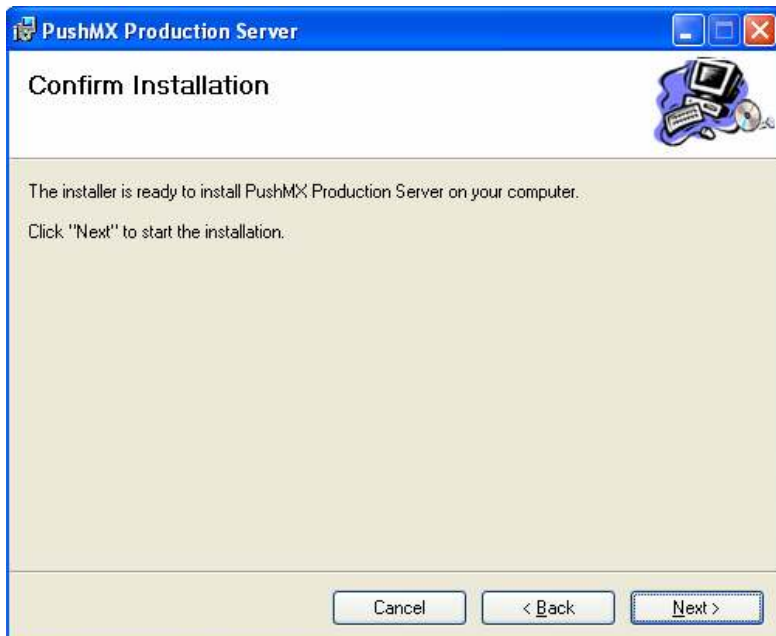
13. Click the “Next” button on the PushMX Production Server window.



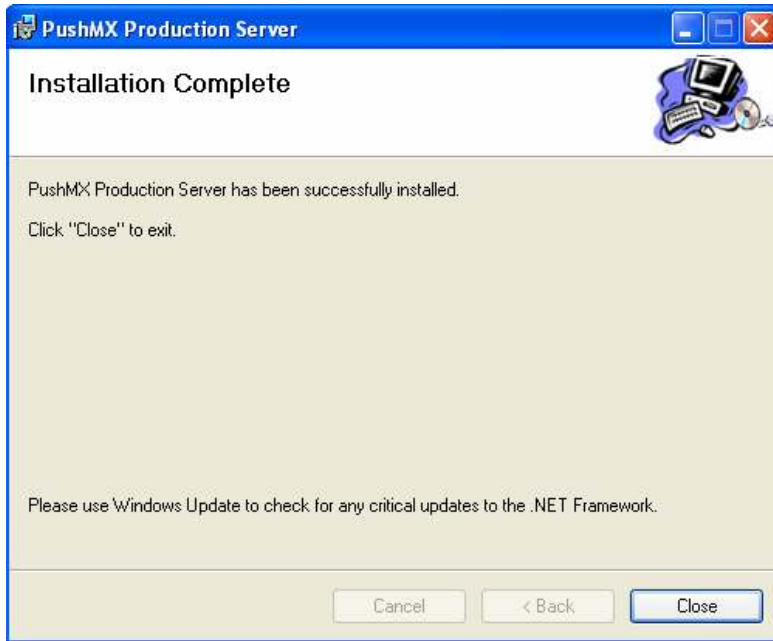
14. When you see the below window do *NOT* click the “Next” button. Instead...



- A. Right mouse click on Windows Start
 - B. Click on “Explore”
 - C. Navigate to C:\Documents and Settings\All Users\Desktop
 - D. If you **DO NOT** see a shortcut for the PushMX Server icon:  then in the “Select Installation Folder” window select the radio button for “Just me” and then click the “Next” button.
 - E. If you **DO** see a shortcut for the PushMX Server icon then in the “Select Installation Folder” window select the radio button for “Everyone” and then click the “Next” button.
15. Click the “Next” button in the “Confirm Installation” window.

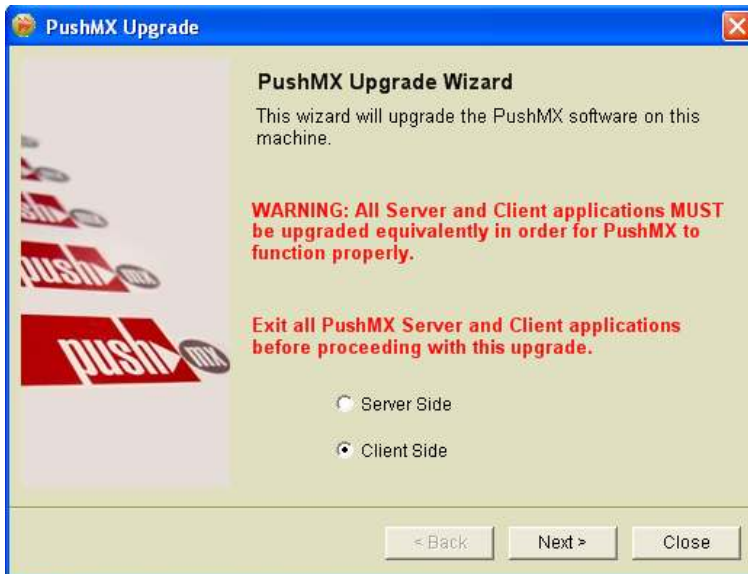


15. Click the "Close" button

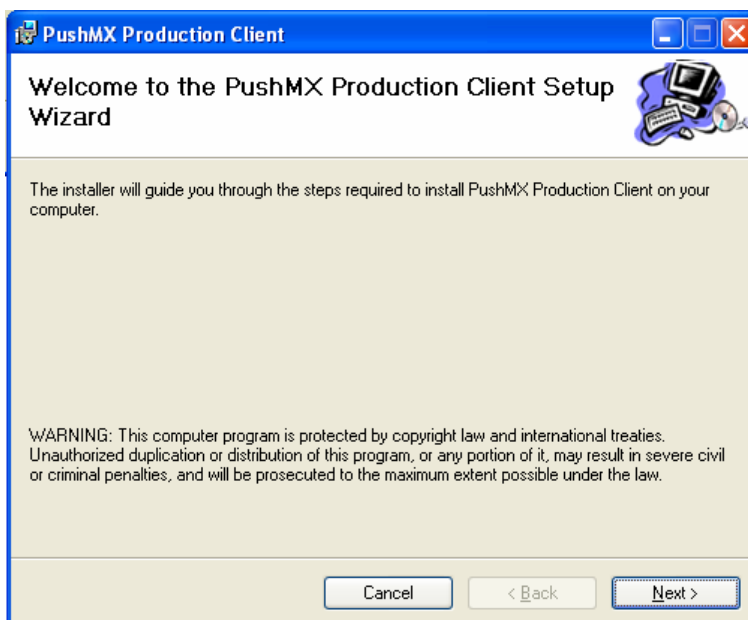


Upgrading the PushMX Clients

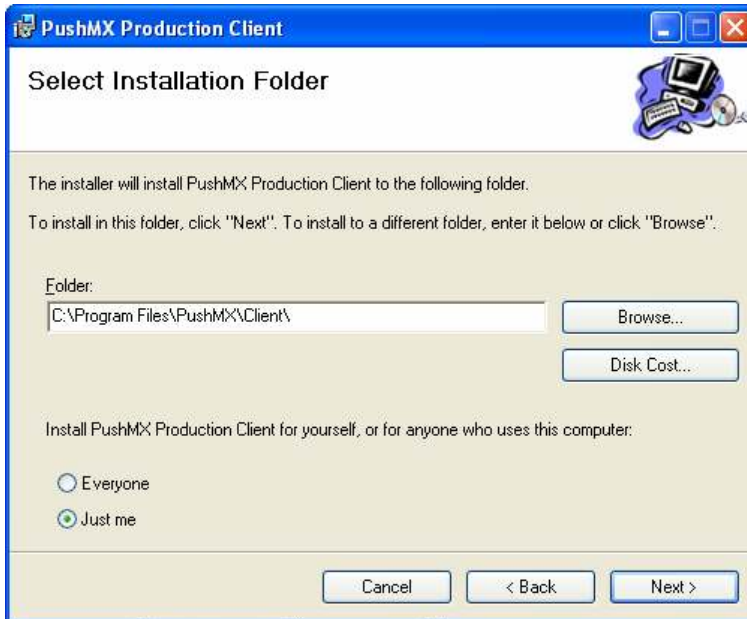
16. Once you have successfully upgraded you can upgrade all the PushMX Production Clients. Execute the below procedure on each PC that needs the Client upgraded. ***To do to this, you will need to copy the Client folder from the upgrade package *to each PC where the PushMX Client is installed.****
17. Double click on "PushMXUpgrade.exe"
18. Heed (and follow) the red WARNINGS. Verify that the radio button for "Client Side" is selected then click the "Next" button




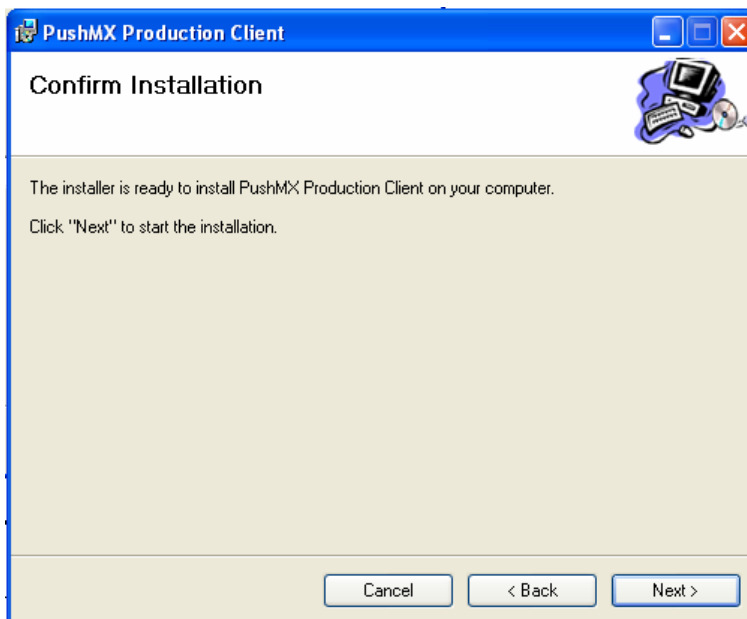
19. Click the "Next" button



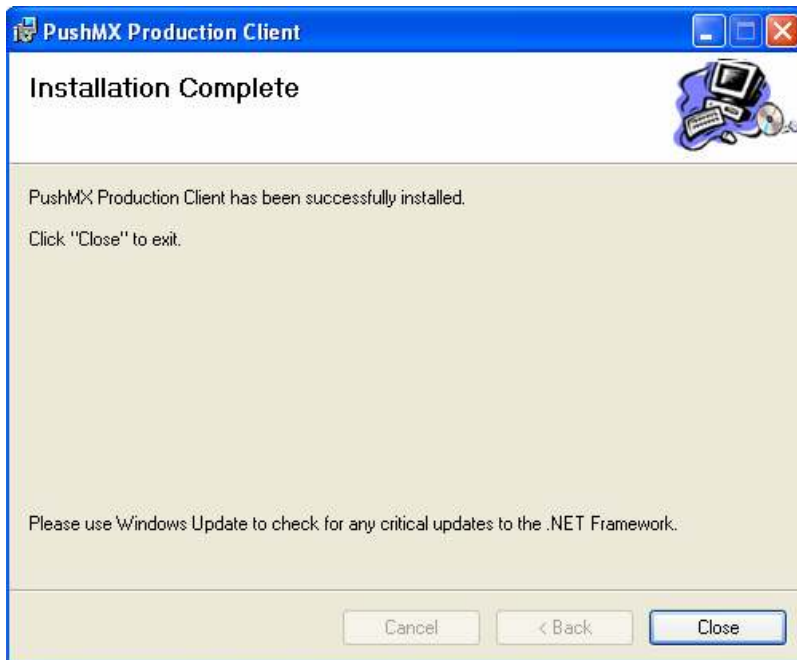
20. When you see the below window do *NOT* click the “Next” button. Instead...



- A. Right mouse click on Windows Start
 - B. Click on “Explore”
 - C. Navigate to C:\Documents and Settings\All Users\Desktop
 - D. If you **DO NOT** see a shortcut for the PushMX Client icon:  then in the “Select Installation Folder” window select the radio button for “Just me” and then click the “Next” button.
 - E. If you **DO** see a shortcut for the PushMX Client icon then in the “Select Installation Folder” window select the radio button for “Everyone” and then click the “Next” button.
21. Click the “Next” button in the “Confirm Installation” window

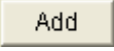


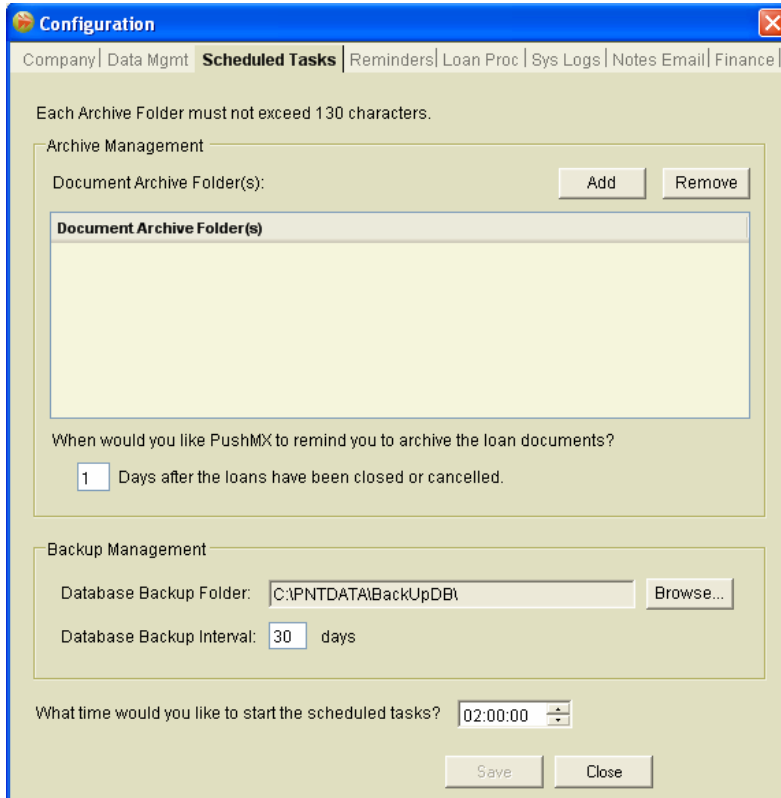
22. Click the "Close" button



Important Configuration Changes to make after the upgrade

In order to maximize performance on the server or PC where the PushMX Server application is installed, following the upgrade to 4.0 you will need to configure both archive and backup folders. The archive folder is where documents you have electronically loaded into PushMX Production's Document Management facility will be archived after loans close. The backup folder is where the PushMX database gets copied to.

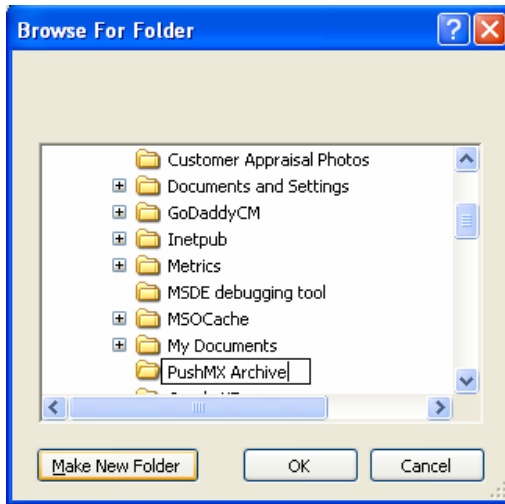
1. On either the PushMX Server application or the PushMX Client application click on Configuration / Core Configuration / System Configuration / Scheduled Tasks.
2. Click on the  button.



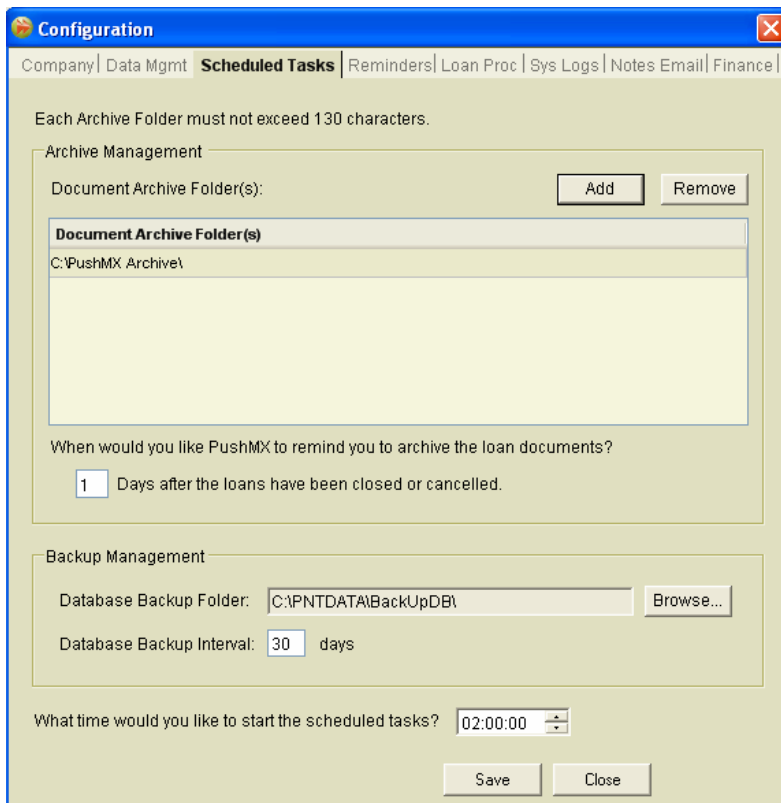
The screenshot shows a 'Configuration' window with a blue title bar and a menu bar containing 'Company', 'Data Mgmt', 'Scheduled Tasks', 'Reminders', 'Loan Proc', 'Sys Logs', 'Notes Email', and 'Finance'. The main content area is divided into two sections: 'Archive Management' and 'Backup Management'. In the 'Archive Management' section, there is a text input field for 'Document Archive Folder(s)', 'Add', and 'Remove' buttons, and a list box labeled 'Document Archive Folder(s)'. Below this is a question 'When would you like PushMX to remind you to archive the loan documents?' with a text input field containing '1' and the text 'Days after the loans have been closed or cancelled.'. The 'Backup Management' section includes a 'Database Backup Folder:' label, a text input field containing 'C:\PNTDATA\BackUpDB\', and a 'Browse...' button. Below that is 'Database Backup Interval:' with a text input field containing '30' and the text 'days'. At the bottom, there is a question 'What time would you like to start the scheduled tasks?' with a time picker showing '02:00:00'. 'Save' and 'Close' buttons are at the bottom right.

3. In the Browse for Folder window that pops up, navigate to the desired location. Recommended would be a local drive specifically designated for data storage.

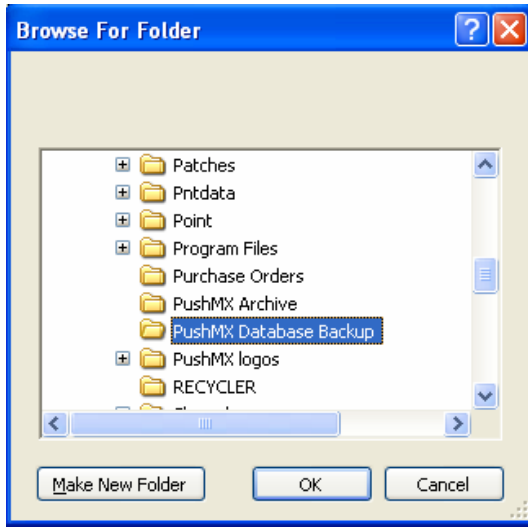
- Once you're in the desired location, if you haven't already created a folder for the archive, you can create one on the fly by clicking the **Make New Folder** button. In the example below, the new folder created by doing this was named "PushMX Archive."
- Click the **OK** button.



- In the Document Archive area, the Database Backup Folder will already be populated with a value of C:\PNTDATA\BackUpDB\. You can either leave this as is (PushMX Production created this folder during the upgrade process) or change to a different folder it via the **Browse** button.



7. In the Browse for Folder window that pops up, navigate to the desired location. Recommended would be a local drive specifically designated for data storage.
8. Once you're in the desired location, if you haven't already created a folder for the backup, you can create one on the fly by clicking the button. In the example below, the new folder created by doing this was named "PushMX Database Backup."
9. Click the button.



10. You will now be back in the Configuration window. Click the button and then the button.

Upgrading the PushMX Website

If you are running a PushMX Communications website you will also need to upgrade it as well.

1. Download the "PushMX Production 4.0 Communications Website Installation Package"
2. After downloading, right mouse click on the "PushMX Production 4.0 Upgrade.zip" file and select "Extract All"
3. Copy and paste the unzipped files and folders into the current location of your PushMX Communications website in My Computer
4. Go to the "dll" folder
5. Double click on the "RegDlls.bat" file
6. Verify that all four of the DLLs get successfully registered