

# Exceed! Basic Upgrade Instructions

## GENERAL INFORMATION

You are about to download and run an Exceed! Basic program upgrade. Running this upgrade will update your Exceed! Basic program, and Help Contents, to the latest versions. Your contact and donation data will remain unchanged, after running the upgrade. Your application and security settings (including your Login IDs and Passwords) will also remain unchanged. A password is required, to run the Exceed! Basic upgrade. To obtain a valid upgrade password, call Arreva Technical Support at: (800) 750-6418.

## PRE-UPGRADE REQUIREMENTS

- Verify that all users are logged out of Exceed! Basic
- Backup your Exceed! Basic Data folder
- You can find instructions on how to backup your data folder in the Exceed! Basic Help Menu
- Call Arreva Technical Support for a valid upgrade installation password
- Determine the location of your Exceed! Basic folder, for example C:\ExBasic

## INSTALLING THE EXCEED! BASIC UPGRADE

- On the Product Upgrades page of the Arreva website ([www.arreva.com/services/upgrades.html](http://www.arreva.com/services/upgrades.html)), click on the Exceed! Basic Upgrade link.
- After clicking the upgrade link, you may have the option of initiating the upgrade from your browser, or saving the ExBasicUpgdXX.exe or file to your local drive, we recommend saving the upgrade installer to your local drive (preferably your Desktop).
- If you saved the file, locate the directory where you saved it, and double-click on it to begin the upgrade.
- In the Choose Destination Location window, click the Browse button to select the existing Exceed! Basic program folder. Click Next to accept the default directory, C:\ExBasic.
- Read the information in the Important Notes window. Click Next to continue.
- Read the information in the Software License Agreement window, and click Yes or No, as appropriate, to continue.

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- In the Password window, enter the upgrade password obtained from Arreva Technical Support. Please note the password is case sensitive.
- The Setup window opens and begins copying Exceed! Basic files.
- In the Data Update window, click OK to upgrade your Exceed! Basic database. A message appears in the upper-right corner of the screen indicating that the Exceed! Basic database is being updated.
- A message will appear telling you the update is complete. Click OK.
- Click Close in the Finished window.

## PCI COMPLIANCE

To comply with the PCI DSS mandate, all versions of Exceed! *Basic 4.0* and higher no longer have a field to store the credit card number in the Gifts & Pledges screen. The CK/CC # field is now only intended to be used to store check numbers, and the length of the field has been truncated to 12 characters. When upgrading to any version of Exceed! *Basic 4.0* or higher, all credit card numbers currently stored in the CC# field of the Gifts & Pledges screen will be truncated to the last 4 digits of the credit card number

For more information on PCI Compliance, please see these resources:

[PCI Compliance Quick Reference Guide](#)

[PCI Standards Council](#)