



TELOSA™ SOFTWARE

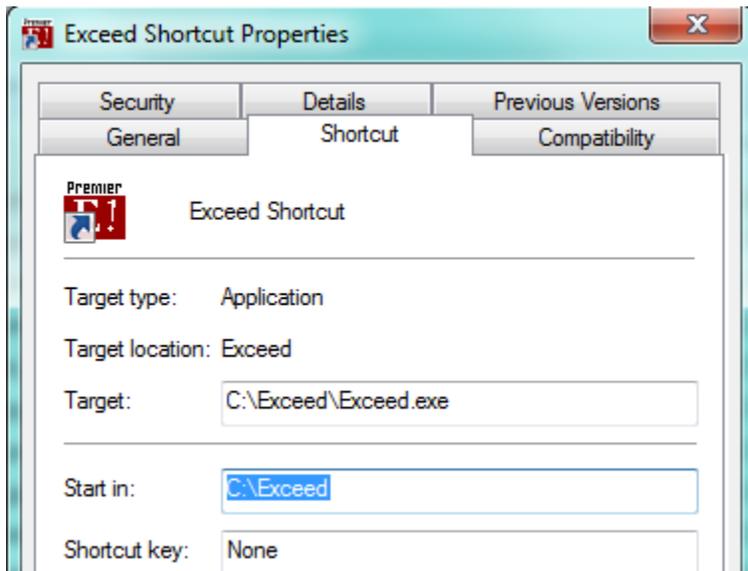
Exceed! Premier Upgrade Instructions

LOGIN INFORMATION

Your User Login ID and Password will not change when logging into Exceed! Premier after completing the upgrade. However, a password is required to install all Exceed! Premier upgrades. If you downloaded the upgrade installer from the Telosa website please call Telosa Technical Support at 800-750-6418 or email our support team at support@telosa.com to obtain the password. If you received the upgrade installer on a CD, no password is needed.

PRE-UPGRADE REQUIREMENTS

1. IMPORTANT – Be sure to back up your data before upgrading.
2. Verify that all users are logged out of Exceed! Premier.
3. Make sure you have the upgrade password before starting the upgrade.
4. Locate the file path to the Exceed folder. On step 2 of the upgrade you will be asked to locate the Exceed program folder. For some people the path will simply be “C:\Exceed.” For others using Exceed on a network it will either be a mapped network drive, (T:\Exceed), or a UNC path, (\\MyServer\Exceed). In any case, to find out what your upgrade path is simply right-click on your Exceed! program shortcut, usually found on your desktop, and go to Properties. This will take you to the Shortcut tab on the Properties window. The **Start in:** field will show you the path to your Exceed folder. Remember this path as you will be asked for it during the upgrade.



DOWNLOADING THE EXCEED! PREMIER UPGRADE FROM THE WEB

Click the link below to go to our downloads page. Locate the latest upgrade link and click it. You may have the option of initiating the upgrade from your browser or saving the Setup file to your local drive, we recommend saving the upgrade installer to your local drive (preferably your Desktop).

Exceed! Premier Upgrade Page: <http://telosa.com/services-work/downloads/>

PCI COMPLIANCE

To comply with the PCI DSS mandate, all versions of Exceed! *Premier* 8.0 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! *Premier* 8.0 or higher, all credit card numbers currently stored in the CC# field of the Gifts & Pledges screen and EFT Setup screen will be truncated to the last 4 digits of the credit card number. Because credit card numbers will no longer be stored in the EFT Setup screen, IATS processing will be the only option for processing credit cards in the EFT Module.

Credit card processing within Exceed! *Premier* using IATS is already PCI compliant. When you process credit card transactions in Exceed! *Premier* using IATS, the credit card information is represented by a reference token stored in your Exceed! database which will summon the stored credit card number from IATS to be used in the transaction. For more information on PCI Compliance, please see these resources:

[PCI Compliance Quick Reference Guide](#) | [PCI Standards Council](#) | [Idealware PCI Compliance Quiz](#)

INSTALLING THE EXCEED! PREMIER UPGRADE

1. Open Windows Explorer, locate the directory in which the downloaded upgrade setup file resides, and double-click it to begin the upgrade.
2. In the **Choose Destination Location** window, click the **Browse** button to select the directory where your Exceed program directory is located, then click **Next**. If you are not sure where the Exceed program folder is located see item #4 above in the [Pre-Upgrade Requirements](#) section.
3. Read the information in the **Important Notes** window. Click **Next** to continue.
4. Read the information in the **Software License Agreement** window, and click **Yes** or **No**, as appropriate, to continue.
5. In the **Password** window, enter the upgrade password obtained from Telosa Technical Support. Please note the password is case sensitive.
6. Read the information in the **Ready To Install** window. Click **Next** to continue.
7. The **Setup** window will open and start copying Exceed! program files.
8. In the **Database Upgrade** window that appears, click OK to upgrade your Exceed! database.
9. If this is the first time upgrading to version 8.0 or higher, a **Database Upgrade Warning** window will appear regarding PCI compliance. If you agree with continuing the upgrade, click **Yes**.
10. Click **Yes** in the next window if you have made a backup of your data.

IMPORTANT – Do not interrupt the computer while the upgrade is in progress.

11. A message will appear saying the upgrade has been successfully completed. Click **OK** to continue.
12. If there are other computers on your network that run the Exceed! program, you will need to run the **Workstat.exe** program on those machines. To do this, go to each computer that runs Exceed! *Premier* and navigate to the Exceed program directory and double click on the file called **Workstat.exe**.

NOTE: When running the upgrade and Workstat.exe, you need to have appropriate user rights to your Windows operating system for all components to be installed properly. We recommend being logged on as the Administrator when installing the upgrade and Workstat.exe.