

## How To Backup IFA Software Applications on Depositit

Depositit is aware that Financial Services Companies use many software applications to assist their business (I.e. mbl, encore, ccl), and the data created via these applications is important to back up.

Please bear in mind that although you can back up the entire application, this is not generally necessary and will cause you to use up more of your Depositit storage allocation than required.

The software provider should be able to provide you with a new copy of the application if required; hence **the important files to backup are those that correspond to the data you have generated.**

Please find below details of the relevant files you should select to backup within some of the more popular applications being used within the industry.

Please also bear in mind when backing up databases using the Depositit software, we recommend reducing your 'Backup Cycle' to between 1 and 7 (from the default 30). Complete instructions on how to backup databases can be found in the support area of our website at: <http://www.depositit.com/support/windows/backupdbase.shtml>

**Please Note:** We are not the authors of these programs and are providing information that has kindly been presented by the authors. We cannot answer questions related to these products and have included contact details if further support is required.

The List of suppliers below is in ALPHABETICAL ORDER

### 1<sup>st</sup> Software

1<sup>st</sup> software has provided the following information.

The 4 files required to back up are:

1. Main1st.mdb
2. Slett1st
3. Licence.1st
4. The Letters folder

All of the above can be found in the folder/directory titled: 1stdir32 folder

Contact details:

Tel: 08450 68 1000

E: [support@1stsoftware.co.uk](mailto:support@1stsoftware.co.uk)

W: [www.1stsoftware.co.uk](http://www.1stsoftware.co.uk)

### ACT!

To securely backup your ACT! information, when you set up ACT! ensure that you create a 'backup folder' within your 'My Documents/ACT!/Backup' folder. Every time you back up your ACT! data from the ACT! menu 'File/Backup' it will be saved to this folder.

If you have selected Depositit to backup your 'My Documents' folder, your ACT! information will be included, and automatically backed up every time.

For further assistance please contact: Paul Walman of ACT Now Consulting on:  
Tel: 01923 856 513 or email [paul@actnowconsulting.com](mailto:paul@actnowconsulting.com)

### **CCL Software**

CCL provide a number of solutions and below are the relevant details for each (underlined).

1. **Simplicity software** (database):

C:\programfiles\cclsoftware\simplicity\simplicity.mdb

2. **Client Accounts program**, there are two files

C:\programfiles\cclsoftware\client accounts\caneeds.mdb

C:\programfiles\cclsoftware\client accounts\cliacc.mdb

3. **Informa** has just one client file to backup

C:\programfiles\cclsoftware\informa\informa.mdb

4. **Necessity** has just one client file to backup

C:\programfiles\cclsoftware\necessity\necessity.mdb

Contact details:

Tel: 0845 490 0101

E: [support@ccl-uk.com](mailto:support@ccl-uk.com)

W: [www.ccl-uk.com](http://www.ccl-uk.com)

### **CETA**

The Ceta file that you should backup can be located following this path:  
c:\newqu\quotes

Contact Details:

Tel: 0845 458 3075

<http://www.ceta.co.uk/>

## **Fairs Software**

If you are using Fairs software, you should back up everything in the following paths including all sub-directories:

\program files\fairs\man           - For the 32-bit application  
\Winfairs                           - For the 16-bit application

Contact details:

Tel: 0191 245 2020

E: [support@fairs.plc.uk](mailto:support@fairs.plc.uk)

W: [www.fairs.plc.uk](http://www.fairs.plc.uk)

## **INVU – Document management solution (for scanned documents)**

Invu supply a number of systems, so please check which system you are using and then follow the instructions below to backup the relevant files.

### **S100:**

C:\invu100\data  
C:\invu100\s100

### **S200:**

C:\centura\s200  
Invu Data Share  
Invu Secure Folder

The second two depend on where the Invu technician has installed them. Their location can be found by clicking on the Invu server, Start->Run, type invu.ini. A notepad config file should open. There will be a section near the top of the file labelled [S200] underneath which will be the file locations. All those locations will need backing up.

### **S250:**

C:\centura\s250  
Invu Data  
Invu Secure Folders

As with s200 the same procedure to find these folders applies (see above), but will be found underneath a section labelled [S250] in the ini file

Contact details:

Please contact your INVU supplier for further assistance.

## **Lighthouse (Xpress):**

The lighthousXpress information is easy to backup and can be found here:

C:/link

Please contact Lighthouse Express if you have further questions.

### **Mortgage2000 Encore**

Mortgage2000 have suggested that their customers backup a single folder, and this is the "Recall" folder located at:

C:/programfiles/mortgage2000/encore/recall

Contact details:

Technical Support: 0845 345 5702

E: [support@mortgage2000.co.uk](mailto:support@mortgage2000.co.uk)

W: [www.mortgage2000.co.uk](http://www.mortgage2000.co.uk)

### **Mortgage Brain (mbl)**

Mortgage Brain have suggested they have four folders that should be backed up, and these can be located within the directory folder called mbl (C:/programfiles/mbl):

The 4 mbl folders to back up:

Folder #1: CDB

Folder #2: SAV

Folder #3: WPDOCS

Folder #4: IQ2 (if using MTE)

Contact details:

Tel: 0870 888 0194 (option 3)

E: [Support@mbl.co.uk](mailto:Support@mbl.co.uk)

W: [www.mbl.co.uk](http://www.mbl.co.uk)

### **MortgageStream (digi8)**

By default, MortgageStream is installed under

C:\Program files\digit8\MortgageStream, the executable being MCMS.exe, although this path is configurable at installation time.

It is a client-server app, the data and reports all residing on the server.

Under the above installation path, the folders which need to be backed up are:-

- Database
- Reports
- Record (if call recording configured)
- LetterTemplates

Contact details:

Tel Sales: 08707 117 117

Tel Support: 07044 770 770 (calls charged at 25p/min)

E: [Support@mortgagestream.co.uk](mailto:Support@mortgagestream.co.uk)

W: [www.mortgagestream.co.uk](http://www.mortgagestream.co.uk)

### **Payment Shield (Inertia)**

Paymentshield/Inertia have advised that you should backup everything in the following path:

If you are using Inertia2:

C:\programfiles\inertia\sysfiles\usermdb

If you are using Inertia3:

C:\inertia3\data\pslinertia3\_data.mdf

Contact details:

Technical Support # 08450 615 200

E: [enquiries@paymentshield.co.uk](mailto:enquiries@paymentshield.co.uk)

W: <http://www.paymentshield.co.uk>

### **Plum Software**

There are two data files within Plum software that you should backup.

1. Factfinder Plus Administrator:

You need to backup the data97.mdb file, which is normally found on the C drive under

Factfind\Data\ff\_Data97.mdb

2. Planit:

You need to backup the NewPlanit.mdb database file, which is normally found on the C drive under

Program Files\Plum Software\Planit\NewPlanit.mdb

Contact Details:

Tel: 0845 345 8456

E: [support@plumsoftware.co.uk](mailto:support@plumsoftware.co.uk)

W: <http://www.plumsoftware.co.uk>

### **SAGE:**

Backing up SAGE (database) files are covered in this link:

[www.depositit.com/download/HowtoBackupSAGEonDepositit.pdf](http://www.depositit.com/download/HowtoBackupSAGEonDepositit.pdf)

Contact Details:

If you have specific questions regarding your Sage application, please contact your Sage reseller.

## **Trigold**

Trigold have provided us with the following information:

The main client files that need to be backed up are:

1. saved folder
2. factfind.mdb
3. userdata.dat

All three files are located in the c:\trigold folder (or which ever directory Prospector is installed on).

Alternatively you can also do a back up via  
start>>>programs>>>trigold>>>prospector>>>maintenance.

Make sure only customer data box is ticked and then click on back up to file and save in/on desktop and different directory. It will be saved in a trigold.tbk format.

Contact details:

Technical Support: 0870 241 5465

E: [support@trigold.co.uk](mailto:support@trigold.co.uk)

W: [www.trigold.co.uk](http://www.trigold.co.uk)

## **Quay Software CCD/Link**

Normally the database files are stored in C:\LINK. If you have a fileserver they could be installed anywhere.

You can check the registry key HKLM\Software\Quay Software Solutions\Client Care Desktop\Installation\Static\Database Directory which may point to the correct directory.

If it is only installed on a single machine the path is  
C:\link

For support on the Quay software products, please contact their helpdesk on:

Tel: 0870 224 7252

<http://www.quaysoftware.co.uk>