

WORKBOOK CONVERSION STEP BY STEP INSTUCTIONS

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How to Manually Convert a Workbook from Home Loan Manager Pro 7.1 to 9.1

When upgrading to version 9.1 of the software you have to go into the old version of the software first and export your workbook.

- You will need to have the old version of the software installed to export your workbook.
- You only have to do this process once.
- **Refer to the TIPS** and the end of this document if you need help.

STEPS 1 TO 4 - USING THE OLD VERSION OF THE SOFTWARE

STEP 1 - Start the Old Version of the software

- Start the **old version** of Home Loan Manager Pro as you normally would. For example in Windows you would select Home Loan Manager Pro from the Start Menu.



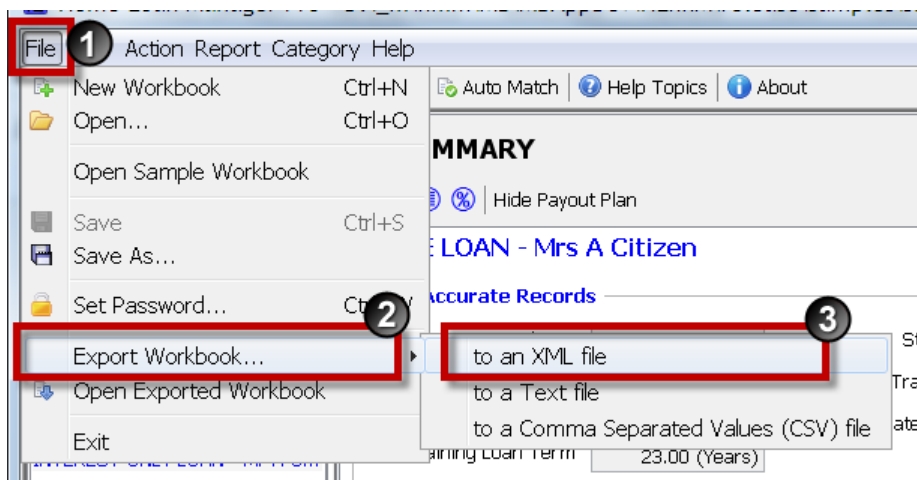
Home Loan Manager Pro

STEP 2 - Make sure your workbook is open

- By default the software opens the last workbook used at start-up. Make sure you can see your loan details in the software (if not, then manually open your workbook).

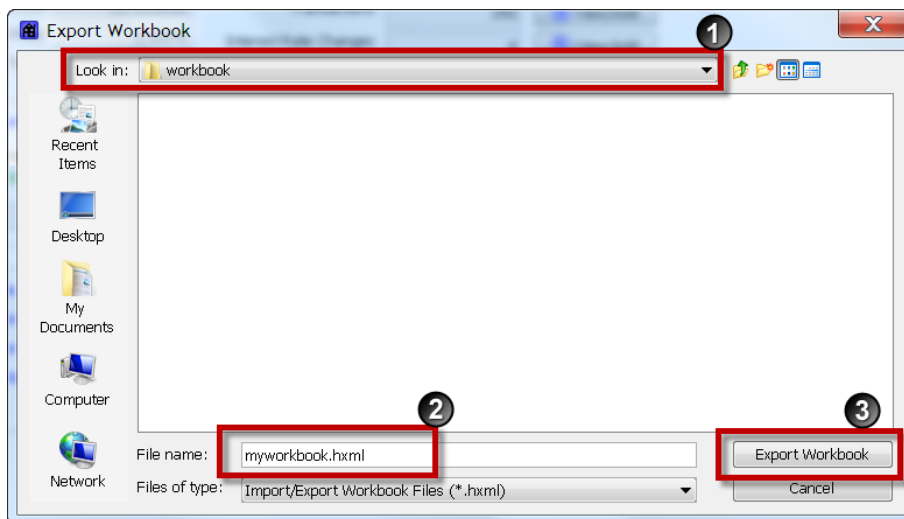
STEP 3 - Export Your Workbook to an XML File.

- From the "**File**" menu, select "**Export Workbook...**" and choose "**to an XML file**"



STEP 4 - Choose a filename and location for the export

- Choose a folder to place the workbook in (e.g. "D:\temp\workbook")
- Give the workbook a name (e.g. "myworkbook.html")
- Click on "Export Workbook" to create the export file.



STEPS 5 TO 9 - USING THE NEW VERSION OF THE SOFTWARE

STEP 5 - Start the New Version of the software

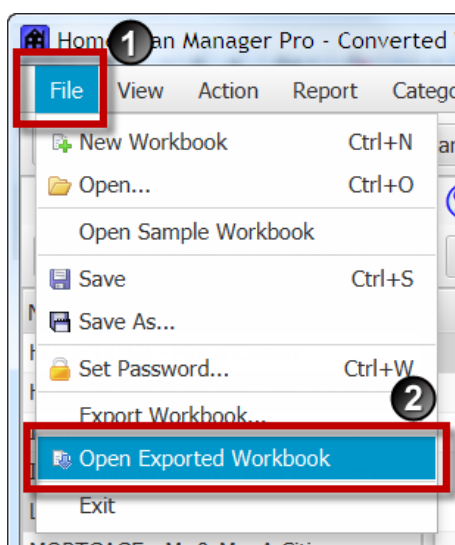
- Start the **new version** of Home Loan Manager Pro. For example in Windows you would select Home Loan Manager Pro 9.1 from the Start Menu. NOTE: The new version will include a version number (e.g. 9.1) in the name.



Home Loan Manager Pro 9.1

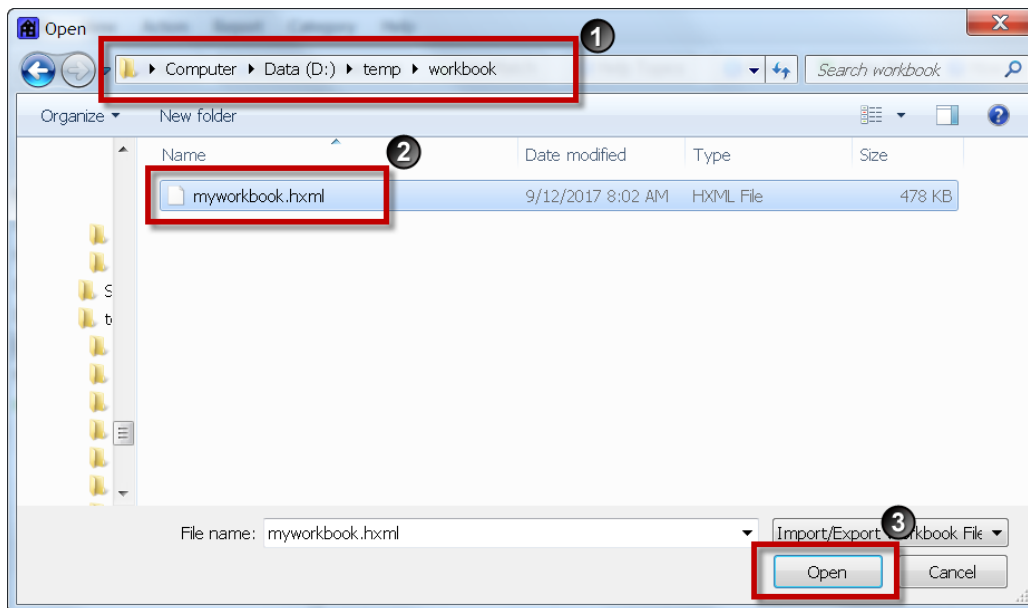
STEP 6 - Import your Exported Workbook

- From the "File" menu, select "Open Exported Workbook".



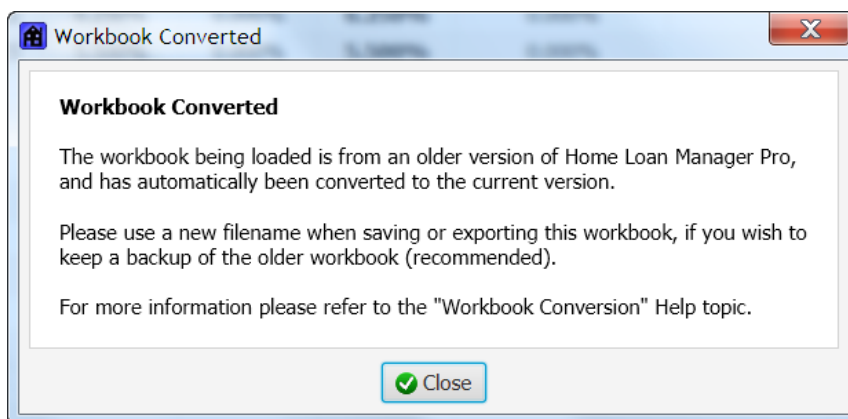
STEP 7 - Select the location and filename

- Find the exported file you created in STEP 4 above.
- Choose the folder location
- Click on the file
- Click on the "Open" button



STEP 8 - You should see the Workbook Converted message

- If everything worked OK you should see the "Workbook Converted" message.
- Your loan details should be visible in the software.

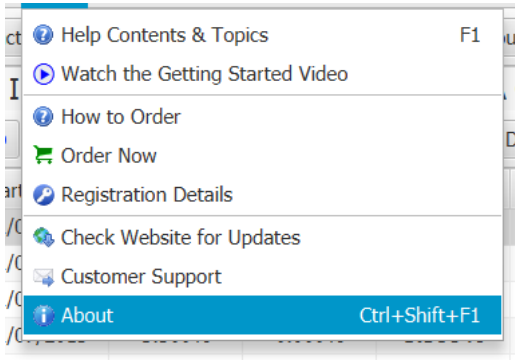


STEP 9 - Save Your Workbook

- The final step is to save your workbook to a folder where you keep your other personal files. This workbook will then be loaded each time you start the software.
- From the "File" menu, choose "Save As..."
- Select the location to store your workbook
- Enter a filename
- click on Save

TIP 1 - How Can I tell if I am running the OLD Version or NEW Version of the Software?

- When the software is running, from the **"Help"** menu select **"About"**.

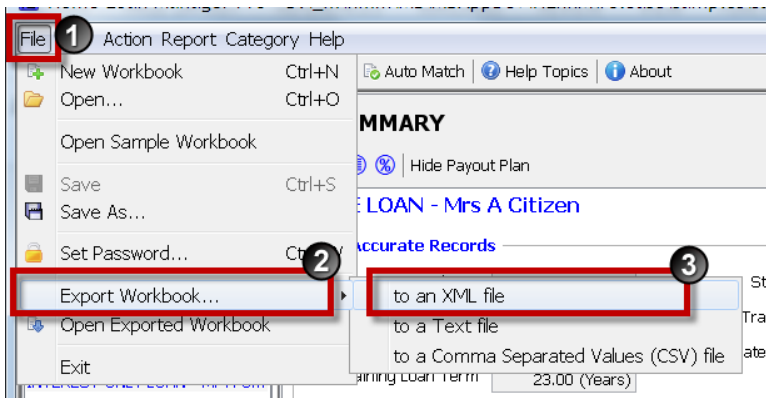


- The screen displayed contains the version number (e.g. Build 9.1.171201 is version 9.1)



TIP 2 - Make sure you use the Export type of "an XML file"

- When exporting your workbook from the old version of the software make sure you choose **"an XML file"**.
- The options **"to a Text file"** and **"to a Comma Separated Values (CSV) file"** won't work.



TIP 3 - You have uninstalled the Old Version of the Software - Now What?

- If you no longer have the older version installed get in touch with our support (via our website).
- When we receive your request we will send you the download link to the old version.

TIP 4 - Stuck? It is all too hard?

- If you are stuck we can convert your file for you. Get in touch with our support (via our website) and let us know you need help converting your file.
- When we receive your request we will send instructions on how to provide a copy of your old workbook.