

# Backing Up/Restoring Your PhoneTree System

For PhoneTree 2100, 2500, 3500, VoiceWave Series, Patient/Dental/Veterinary Messaging, and HealthWave models

**Important:** Please keep your current PhoneTree software **Installation CD** in a safe place. In the event you ever need to restore your PhoneTree system, or relocate it to another computer, you **MUST** use the same version of the PhoneTree software your backup files were created from (to identify your software's version, click **Help > About** from any PhoneTree desktop view).

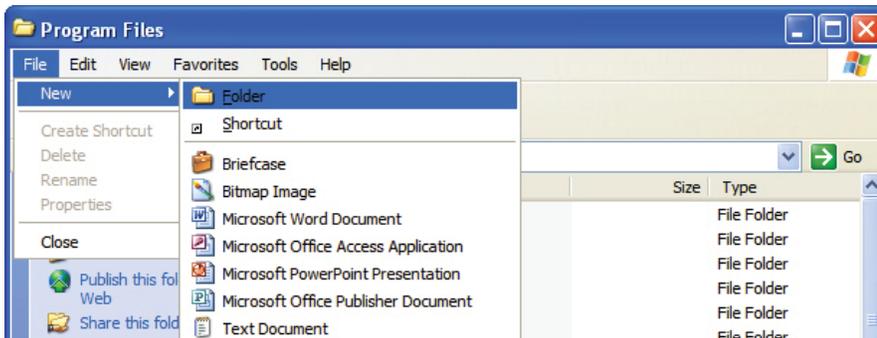
## Backing Up Your PhoneTree System

**Question:** How do I create a backup of our PhoneTree system?

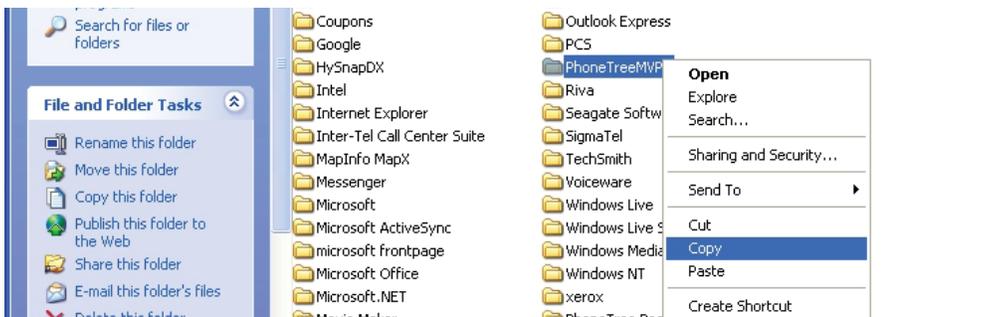
**Answer:** To create a backup of your PhoneTree system, including all recordings and configurations, follow the steps outlined below:

**Note:** Before proceeding, we recommend first speaking with your IT Administrator for any specific backup methods your office may already use.

1. Make sure no calls are being made and exit the PhoneTree software.
2. On the computer where the PhoneTree system is currently installed, use Windows® Explorer to browse to "C:\Program Files" or "C:\Program Files (x86)."
3. From the **File** menu at the top of the screen, click **New > Folder**. Locate the folder named "New Folder" (should be the last folder here), right-click on it and select **Rename** from the sub-menu that appears. Name the folder "PhoneTree Backup <current version> <current date>" and use the current PhoneTree software version (to identify your software's version, click **Help > About** from any PhoneTree desktop view) and the current date (mmddyy) as part of the name (e.g., Backup 6.9.4 061909).

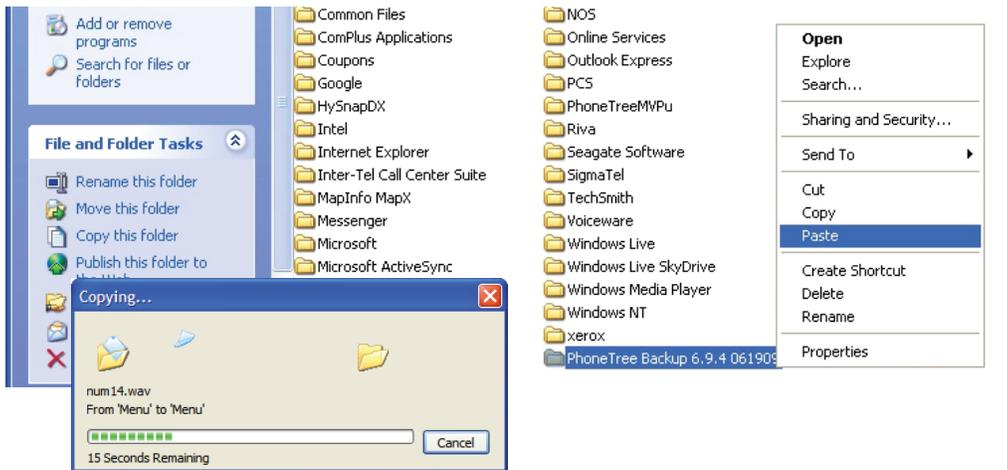


4. Next, right-click on the "PhoneTreeMVPu" folder and select **Copy** from the sub-menu that appears.



## Backing Up/Restoring Your PhoneTree System, continued

5. Right-click on the "PhoneTree Backup" folder you created in step 3 and choose **Paste** from the sub-menu. This will copy the entire PhoneTreeMVPu folder you copied in step 4 into this folder. Once the "Copying..." window disappears, your backup is complete.



6. Copy the "PhoneTree Backup" folder to another location, such as a backup hard drive, USB flash drive or on another computer on your network. If you prefer to copy the "PhoneTree Backup" folder to a CD, make sure you first compress the folder using the Compressed Folder tool in Microsoft® Windows® (right-click on the folder > **Send to** > **Compressed (zipped) Folder**) to prevent the files from being set to read-only, and then write the zipped folder that is created to a CD.

We recommend repeating these steps every time you make changes to your PhoneTree system to keep an up-to-date copy of your files and configurations. As previously advised, consult your IT Administrator about backup procedures for your office.

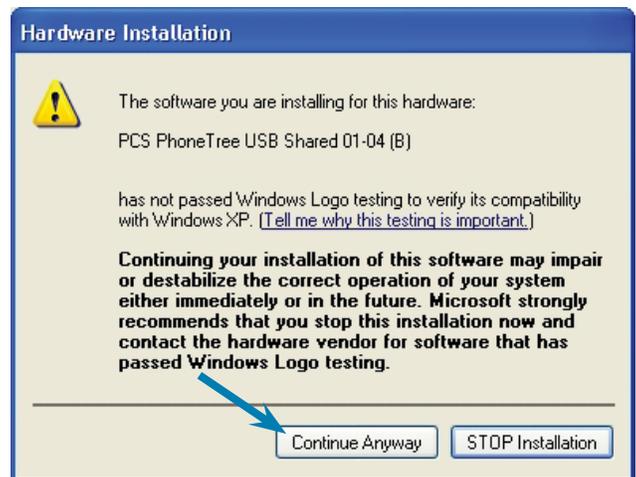
## Restoring Your PhoneTree System

**Question:** How do I install and restore my PhoneTree system on a new computer using the most recent "PhoneTree Backup" folder?

**Answer:** By installing the same version of the PhoneTree software your backup was created from, restoring your PhoneTree system can be accomplished by following the steps outlined below:

**Important:** If you have misplaced your PhoneTree software **Installation CD**, or your copy has a later version number than your "PhoneTree Backup" folder, please contact PhoneTree Customer Support at **800.555.0559**, or by email at **support@phonetree.com**.

1. Make the most recent "PhoneTree Backup" folder available to the new computer by using one of the following two methods:
  - a. Place the folder in a location on the office network where you will be able to browse to them from the new PhoneTree computer; **OR:**
  - b. Create a compressed archive containing the folder, then burn the archive to a CD (creating a .zip or other archive avoids the problem of CD files being automatically set to read-only).
2. Install the PhoneTree software on the new computer while logged into the Microsoft Windows user account that will be used to operate the system. Do not launch the PhoneTree software once the installation is complete.
3. Connect the PhoneTree hardware, including the phone cable(s), USB cable and finally, the power adapter. You may receive one or more messages explaining that PhoneTree has not passed Windows Logo testing. It is 100% safe to install PhoneTree on your computer — therefore you should click the **Continue Anyway** or **Install this driver software anyway button** (Windows Vista® and Windows® 7) at these prompts.



4. Copy the backed-up "PhoneTreeMVPu" folder into the "C:\Program Files" or "C:\Program Files (x86)" directory on the new computer.
5. Launch the PhoneTree software. All of your call lists, messages and option preferences will be available just as they were before they were backed up. If they are not, please contact PhoneTree Customer Support.

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