



RFMS, INC.

Reference Library Documentation

SQL RFMS Conversion Process

Microsoft SQL

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RFMS System Requirements and Recommendations



The RFMS System Specifications can be found at the following link. We have also included them in pdf format and should be in the email you received.

<https://rfmsinc.zendesk.com/hc/en-us/articles/201981506-RFMS-SQL-System-Specifications>



Since this is a Major Data Conversion We recommend that you have your IT Professional perform this conversion and if need be, schedule an appointment prior to the installation with any questions. We strongly recommend a TRIAL CONVERSION be performed on a copy of the RFMS Folder and tested fully prior to the REAL CONVERSION. To create a test company for RFMS version 9, make a copy of the RFMS folder and run the conversion on it. This will allow you to test out the program in addition to the following:

- Get a more accurate timeframe for the conversion
- See the new features of RFMS Version SQL
- Ensure that custom configuration files, if any, are working. If not we can get the file to the Development Team and convert it before running the real conversion.
- You can also run reports on version 9 and compare to the trial conversion.

Two major considerations for the MS SQL Express Version is database size and user count. If your database is less than 1 GB and you have less than 15 users you can use the MS SQL Express. If you have a database over 1 GB or you have over 15 users you will need to purchase MS SQL Workgroup or MS SQL Standard. You will want to check with your Local IT Professional on which one is more suitable for your environment. Also when installing SQL make sure to set for Mixed Mode (SQL Authentication and Windows Authentication).

Pointers / Tips

- 1.) Remember Dos RFMS goes away with SQL RFMS.
- 2.) Make sure all outstanding receipts have been posted to the bank before running this conversion.
- 3.) If you have any crystal reports or other reporting modules, you will need to re-write them to use the new database structure.
- 4.) Make sure to run all RFMS Updates prior to doing the conversion and launch to make sure all is fine prior to the conversion.
- 5.) Make sure to run all windows updates on the server making sure to reboot afterwards and checking before Installing SQL.
- 6.) Make sure E-Commerce is stopped at the server, if using this program.
- 7.) **We recommend a TRIAL CONVERSION and TESTING for about a week to make sure everything is fine prior to the REAL CONVERSION.**
- 8.) **While testing out the modules and data, make sure to test printing from the modules to make sure that any custom configurations you may have are ok.**
- 9.) The System Recommendations are minimum, unless otherwise noted.
- 10.) **The attached document is for converting an existing Server with Pervasive 2000i or later installed already. Please contact RFMS if you have a previous version of Pervasive installed or if you are moving to a new Server.**
- 11.) **Please let us know if you have ANY open orders that have been DOS Partial Billed.**



1. Make sure everyone is out of RFMS.
2. Install SQL and SQL Tools onto the Server, which can be downloaded from Microsoft onto the New Server. If installing SQL 2008 make sure to get SQL 2008 Express with Management Studio. Also make sure to use Mixed Mode Authentication and provide an SA Password. Make note of the Server and instance if any ([see SQL RFMS - 2005 & 2008 Installation Procedure](#)).
3. Perform the Conversion Process to convert RFMS Pervasive to RFMS SQL. ([see SQL RFMS Conversion Document](#)).
4. Configure Backups for SQL Database and schedule to run ([see SQL RFMS Backup Process](#)).
5. Configure SQL and workstations ([see SQL RFMS - Remote Connections, Cliconfg & Workstation Setup](#)).
6. Test from Server and from Workstations to make sure that all is correct