

Investment Property Manager  
*Classic*

*Making The Transition  
From IPM 2007*



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## Overview

IPM Classic is the next direct descendent of a family of software that goes back to IPM 3.2 in 1996, and is 100% compatible with your IPM 2007 databases.

Indeed, a key purpose for IPM Classic is to run as a companion for IPM 2007 in offices with one or more new 64-bit PCs among a lot of older 32-bit PCs. Think of IPM Classic as “IPM 2007 for 64-bit PCs”, though IPM Classic runs on 32-bit PCs, too.

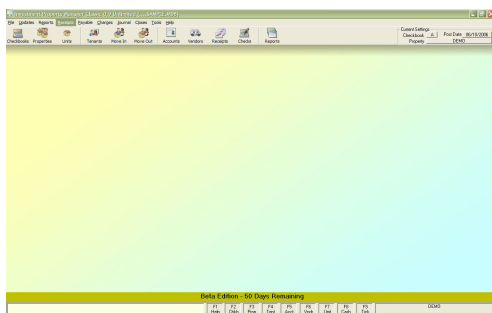
You can upgrade everyone to Classic, or you can replace any IPM 2007 workstation with IPM Classic and still share the same databases, and do the same work the same way as before. IPM Classic allows you the time to transition your PCs from older 32-bit equipment to new 64-bit PCs, no matter how long you need.

In fact, IPM Classic is about 95% IPM 2007, but IPM 2007 cast in a modern development environment. IPM Classic is like the latest Cadillac – you know it’s new, but if you squint you can see it’s evolved from that 1959 Coupe de Ville with the tail fins. In both cases, you’ll also know where most everything is intuitively, but there will be differences.

The User’s Manual installed with IPM Classic will give you all the details if you have the time and patience to read it. This guide is intended to make moving from IPM 2007 to IPM Classic as easy and positive an experience as possible, and give you the highlights of the changes.

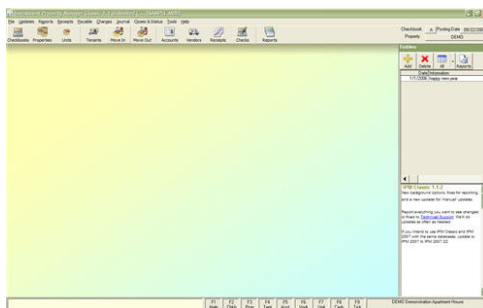
## Newer Look and Feel

Much like the Cadillac mentioned above, the most obviously new aspect is superficial. IPM Classic retains IPM 2007’s format and functionality, but with the enhancements of newer software: tool tips on every control, a real toolbar at the top and a real status bar at





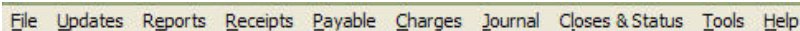
the bottom, and a more pleasant, customizable background on the main screen. You can also display a “tickler panel” like IPM 10, with your ticklers at the top and a web page directly from FullHouse Software at the bottom.



You'll also notice Windows-standard “open” and “save” dialogs throughout, and more modern touches almost everywhere: more dropdowns instead of ‘codes’ to enter, more information wherever possible, and a much-improved reporting environment where you can select a printer from the print preview!

## Menu Changes

IPM Classic is intended to bridge the gap between IPM 2007 and IPM 10, and as such, a few minor changes have been made to nudge users in the direction of IPM 10. For example, IPM 2007’s old-fashioned **Set** menu is now IPM Classic’s **Tools**.



More importantly, IPM 2007’s **Closes** Menu has evolved into IPM Classic’s **Closes & Status**. Key to that change is removal of the anachronistic and misleading **Create Charges (EOM)** from IPM 2007’s ‘Closes’ Menu. It’s now **Create Recurring Charges (EOM)** on the ‘Charges’ Menu. Same functionality, but in a more logical and less intimidating place. (Hint: creating charges has *never* ‘closed’ a month).

The other major menu change has been to the Help menu. Of course IPM Classic comes with a new Help file coordinated with the User’s Guide, but it also has a link to the **User’s Manual**, and a direct link to remote live **Support**. You’ll also notice that there’s an option for IPM Classic’s Updater technology, under **Check for Updates**, plus an option to show the update history for IPM Classic.

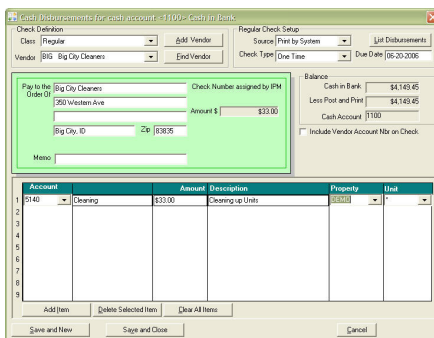


### Screen Changes

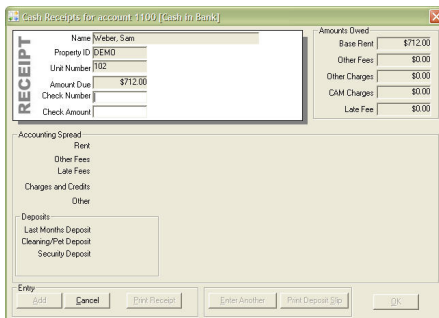
As part of the conversion from the older development environment to the newer one, every control on every screen has had to be replaced. So, while we were there, we made minor changes to many of them. We lined things up. We made the sizes consistent. We exposed more information where possible.

Basically, we did a ‘spring cleaning’ on IPM. Three screens were actually redesigned for IPM Classic: the Checks screen, the Receipts screen and the Bank Reconciliation screen.

The **Checks** screen has been informed by IPM 10, and looks more like a check. Additionally, there’s a new “Find Vendor” button that allows you to easily find a vendor if you can’t remember the Vendor ID.

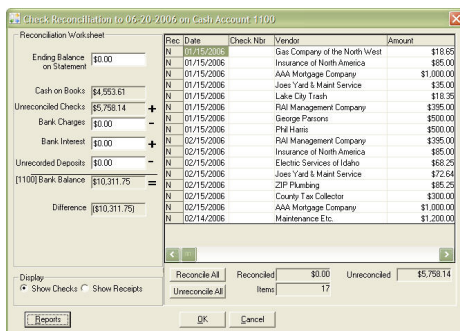


The **Receipts** screen has similar changes. It works just as IPM 2007’s receipt screen did, but looks more like a receipt. It’s also a little smarter about the accounting spread. Where as IPM 2007 often gave you confusing information if you were prepaying or didn’t have the entire amount owed, IPM Classic leaves that decision up to you. This will reduce postings that confuse the tenant’s ledgers, and force you to look at anomalous amounts received.

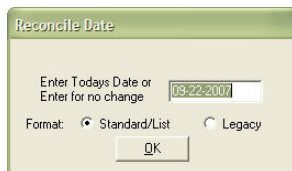




The **Bank Reconciliation** screen was patterned after the ones in other accounting software, and IPM 10. From the older “one-by-one” check format of IPM 2007 (which is still available as the **Legacy** option during the reconciliation process), we’ve gone to a list format that allows you to see all the checks - and receipts – not yet cleared.



Since IPM 2007 did not reconcile receipts, you’ll need to ‘reconcile all’ receipts the first time you do a bank reconciliation in IPM Classic. Thereafter, it can take only 5 minutes to reconcile your bank statement! Of course, if you’re happy with the old format, select the **Legacy** option, and skip the new screen entirely.



## Review

While every screen in IPM Classic is *slightly* different from IPM 2007, most of the changes are ones you won’t notice, or you may acknowledge with an “Oh, I get it.” or, we hope, “Wow, Nice!”

We know that some of the enhancements, like the new options on the Print Preview screen will make your life easier and save you time. Other changes will make it easier to train new users. Still others will simply resolve long-standing issues.

And perhaps the most important update you really won’t see is that IPM Classic is now a “32-bit” application where IPM 2007 is a “16-bit” application. This means that IPM Classic will be around a *long* time, and will run on any (32-bit or 64-bit) PC until 128-bit PCs come out in the distant future, and maybe even then! This means the end to most printer issues, and “CRPE out of memory” issues. And, with IPM Classic’s updater technology, you’ll never wonder if you’ve missed a new feature or fix (as long as you’re on maintenance).