



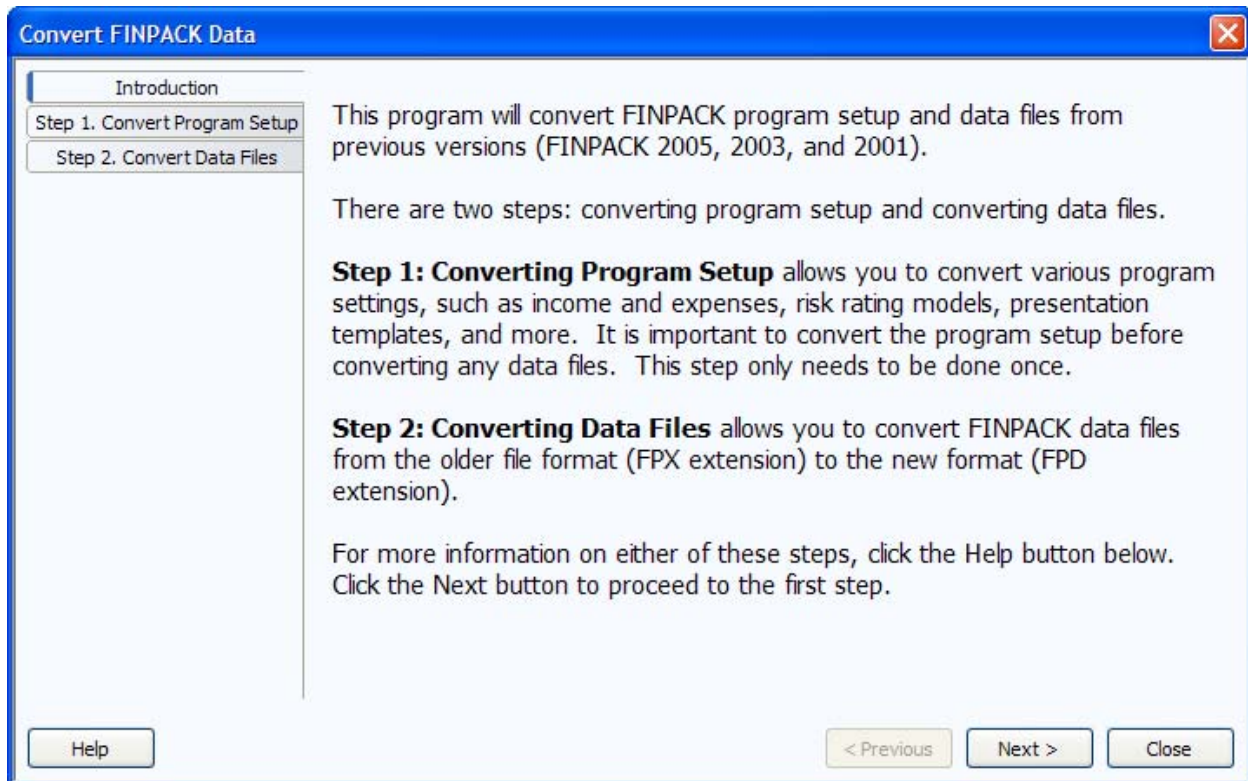
## Conversion Instructions

Previously, FINPACK used data files with an FPX extension (Sample.FPX). In the new version, there is a new format and the new data files have an extension of FPD (Sample.FPD). To use your old files with the new FINPACK, you must convert them to the new file format.

**The conversion process does not change your FPX files. It creates new FPD files.**

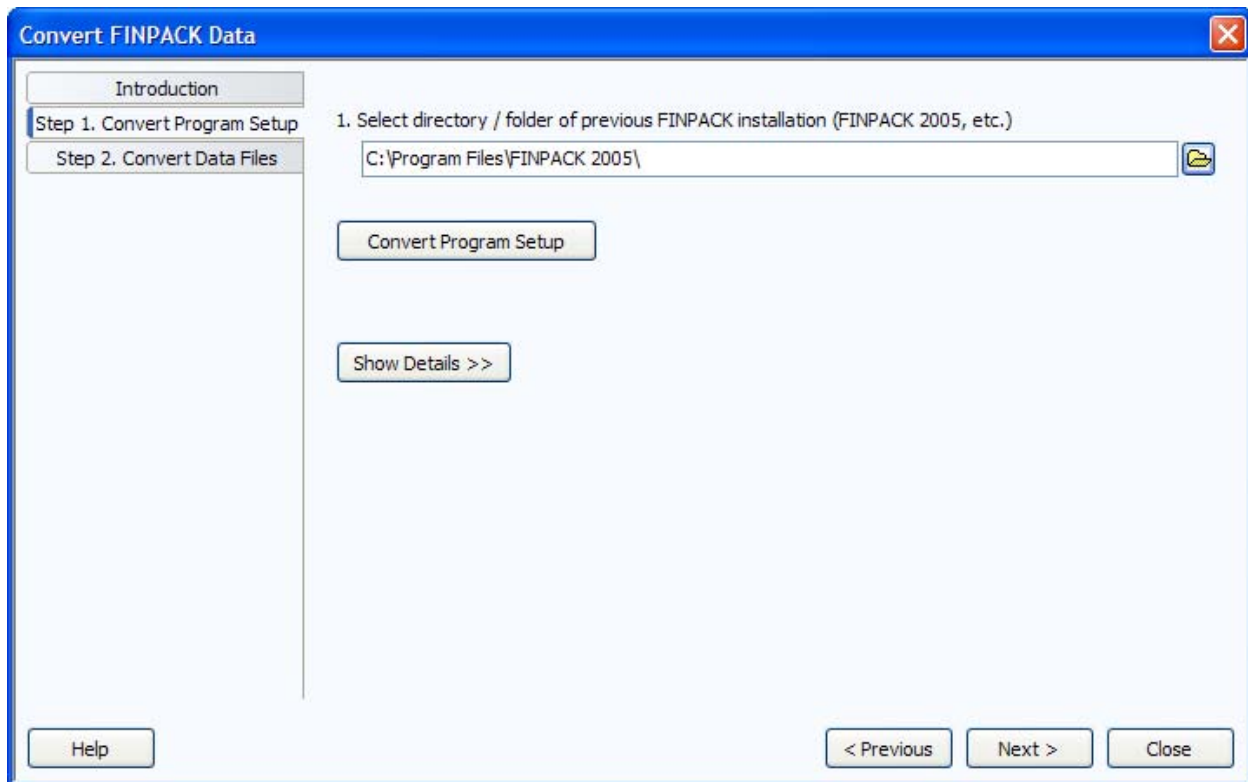
When you first run the new FINPACK, it prompts you to convert your old data files. You can also start the conversion process by selecting “File + Convert” from the FINPACK menu.

There are two steps in the conversion: converting program setup and converting data files. The figure below shows the first screen of the conversion.



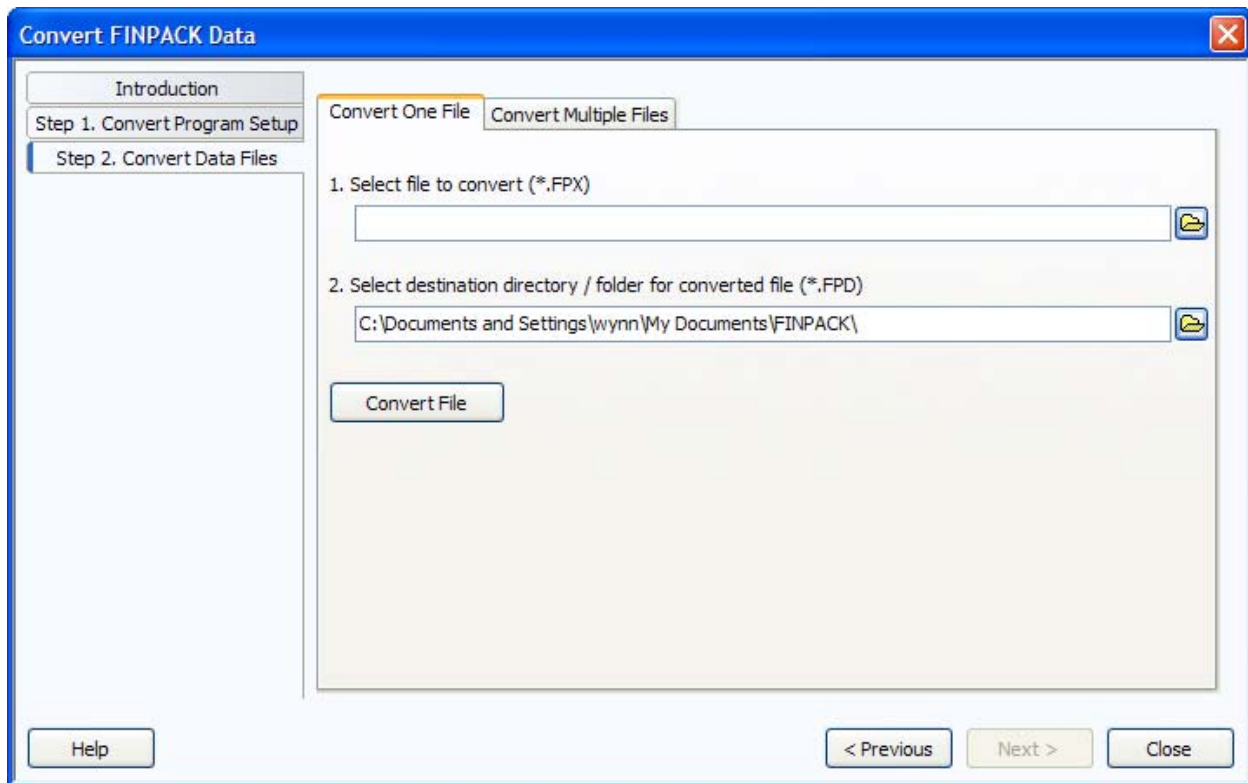
**Step 1: Converting Program Setup** allows you to convert various program settings. It is important to convert the program setup before converting any data files. This step only needs to be done once. The specific program settings that are converted include: collateral discount percents; crops; custom signature page; depreciation percents; expense accounts; feed equivalents; FSA lender profile; general settings (auto-backup, auto-save); income accounts; livestock enterprises; presentation templates; and risk models.

The figure below shows the screen for converting program setup. An edit box shows the directory or folder where the previous version of FINPACK is installed. This is likely filled-out with the correct location, unless you have FINPACK installed on a network drive. If you need to change this directory, click the button to the right of the edit box to browse.



Click the “Convert Program Setup” button to begin this step. It should take just a minute to complete. Once this step is completed, another dialog will be displayed listing what was converted.

**Step 2: Converting Data Files** allows you to convert data files from the older format (\*.FPX) to the new format (\*.FPD). You can choose to convert one file or multiple files in a directory or folder. The figure below shows the screen for converting data files.



*The recommended approach is to convert one file at a time, as needed.*

The first edit box on this screen is where you select the file to convert. Click the folder icon to the right of the edit box to browse for a particular \*.FPX file.

The second edit box is the destination directory or folder for the newly converted file (\*.FPD). The default location is the My Documents\FINPACK folder.

After selecting the file to convert, click the “Convert File” button to begin.

### Edit the Lender/Loan List

When the file conversion starts, a dialog is displayed where you can edit the lender / loan list for the new file.

In the new version of FINPACK two entries, Lender and Description, identify a loan. The previous version combined these in a single entry; Loan Name.

In this file conversion step, you assign a lender for each loan from all the balance sheets in the file. The old loan name is set to the Description and the Lender is set to “Unassigned.”

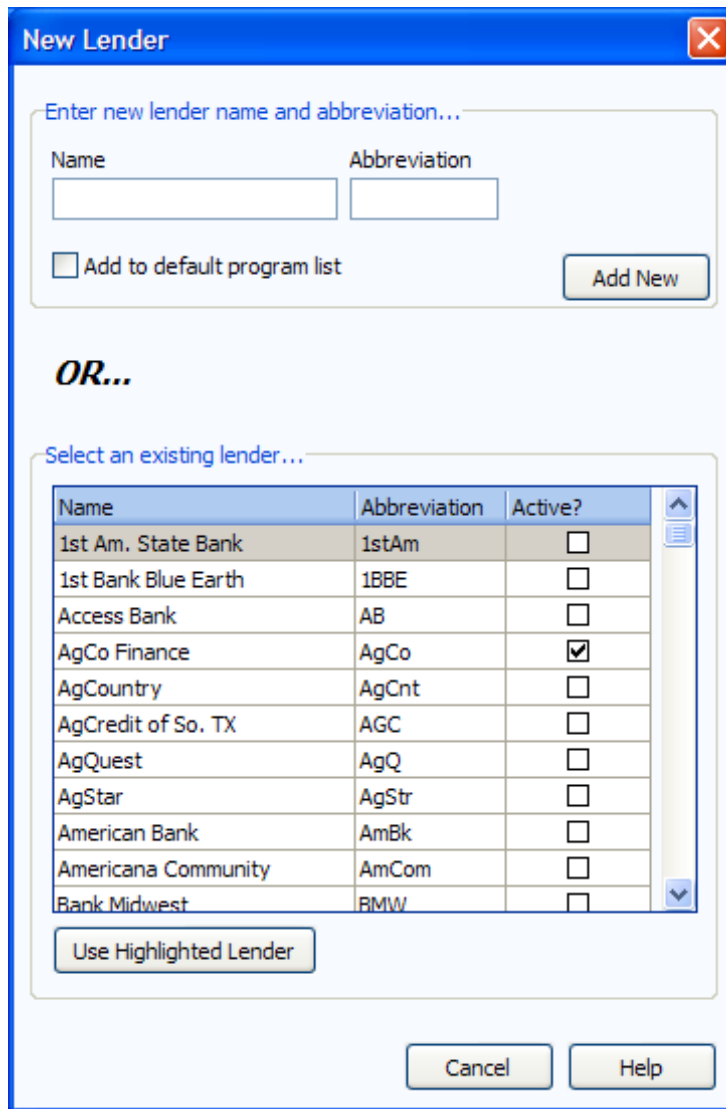
New File		Old File	
Lender	Description	Loan	Most Recent Balance Sheet
First National	Operating	1st National Bank - Oper	1/1/2008
First National	Cattle	First Natl Bank - cattle	1/1/2008
First National	Machinery	First Natl - machinery	1/1/2008
John Deere Credit	Corn Head	John Deere	1/1/2008
First National	Cows	1st Ntl cows	1/1/2008
First National	Real Estate	1st Ntl RE	1/1/2008
Ford Credit	Ford F250	Ford Cred-F250	1/1/2008
John Deere Credit	Combine	John Deere Comb	1/1/2004
CNH Credit	Grain Cart	CaseIH-GrCart	1/1/2004
First National	Machine Shed	1st Ntl Shed	1/1/2003
<b>Elaine Coasting</b>	Con For Deed	Contract For Deed	1/1/2002

The figure above shows a single file conversion after editing the new lender / loan entries (new file columns are on the left). You can choose lenders from a drop-down list selected on the Lender column. If you want to add a lender, select “<Add New>” from that lender list.

*Do you really have to assign all these lenders? You decide:*

1. **Perfect world** – For each loan listed, select a lender from the list and edit the description (if necessary). While time consuming if you have many loans, it fixes all the loans in the file at once and there is no additional clean up when you copy old balance sheets forward to create new balance sheets.
2. **Do nothing** – Leaving the lender as “Unassigned” won’t break anything. This is the fastest approach because you simply click the OK button on the dialog and proceed with the file conversion. However, later on while you are editing new balance sheets in FINPACK, you must fight the urge to assign a lender on these loans, *particularly if you use FINAN*. If you assign a lender to these loans in the new balance sheet, the loans will not match last year’s balance sheet as you work on this year’s FINAN.
3. **Middle-ground (recommended)** – The right-most field in the list shows the most recent balance sheet using the loans. Select the lender and edit the description (if necessary) for the most recent balance sheet. Edit at least the most recent balance sheet, and maybe go back a few years, but you can use your own best judgement. This way you can clean-up the recent history that will likely be used by FINAN and historic trend reports.

When you select “<Add New>” from the lender list, another dialog is displayed where you can enter the new lender name and description or select from a longer list of lenders distributed with FINPACK. An example of the new lender dialog is shown below.



First, look for the lender in the list of existing lenders at the bottom of the dialog. Most lenders are set as inactive and don’t automatically show in the drop-down list to start. If you find an existing lender you want to use, highlight it and click the “Use Highlighted Lender” button at the bottom.

If you have a lender that isn’t already in the list of existing lenders, enter the 20-character name and 5-character abbreviation at the top of the dialog. If this is a lender you want to use across more than one data file, check the “Add to default program list” box. If you leave this box unchecked the new lender is added to the particular file only. When you are ready to add the new lender, click the “Add New” button.

### **Completing the Conversion**

Once you are satisfied with your lender / loan entries, click the “OK” button and the rest of the conversion process will proceed. Depending on the speed of your computer, it should take anywhere from two to five minutes to complete the conversion for a single file.

The new file will be much larger than the previous file. The new file size starts at 5 megabytes and may grow to more than 10 megabytes if you have several years of data.

If there are any issues during the file conversion, another dialog will be displayed listing items that were not converted or need attention in the new file. Click the “Help” button on this dialog for more information.