



Update GENO cash 4 to Version 5

Infographic Guide










1. Requirements

- 1 **Check GENO cash version** – Base SP14 (or newer) mandatory
- 2 **Check operating system** – Minimum Windows Server 2019 (Windows Server 2025 is already supported)





2. Preparing data migration (on the server)

- 1 All users must be logged off 
 - 2 Start the program 
 - 3 Perform database reorganization 
 - 4 **Under Administration > Reports, check:** Set one-time reports either to Private or Daily. One-time reports are deleted after the data migration. 
 - 5 Journals are not transferred. Please print the journals as PDF so they are not lost. 
 - 6 **Note the archiving period** – this will be reconfigured in GENO cash 5:
 - Under Administration > Parameters > CashManagement > Account Information, note the number of days
 - Then, under Statement History, note the history cycle and the retention period
-  **Finally, close the program.**



3. Preparation for installation

- 1 Stop the service and create a 1:1 copy 
- 2 Start the setup.exe from the GENO cash 4 program directory, select “Installation without database service” and confirm. 







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4. Installation of GENO cash 5

- 1 Start the installation of GENO cash 5 (installation package) via Setup.exe. 
- 2 During installation, make sure that it is installed into the old GENO cash 4 directory. A new data backup is not necessary here if it was previously carried out manually. 
- 3 After installation, open the directory (GENO cash, GENO cash4, or...) and start setup.exe there. 
- 4 Select "Server installation with local database service" here. 



5. First start of GENO cash 5

- 1 The data migration starts. Depending on the database size, this can take up to 30 minutes. 
- 2 After logging in, open Administration and – depending on the configuration – Users or User Groups. 
- 3 Assign the CGI payment transactions module to the user or the user groups under Function Profile (under Payment Transaction Modules). 
- 4 Under Administration > Parameters > CashManagement > Statement History, enter the noted values from Version 4. 



Example

Statement history: Annual
Retention period for statement history: 0
Archiving time: Annual
Archive when older than last archiving time plus x period: 3



Warning

The period can always be shortened. However, once something is in the history, it cannot be undone.