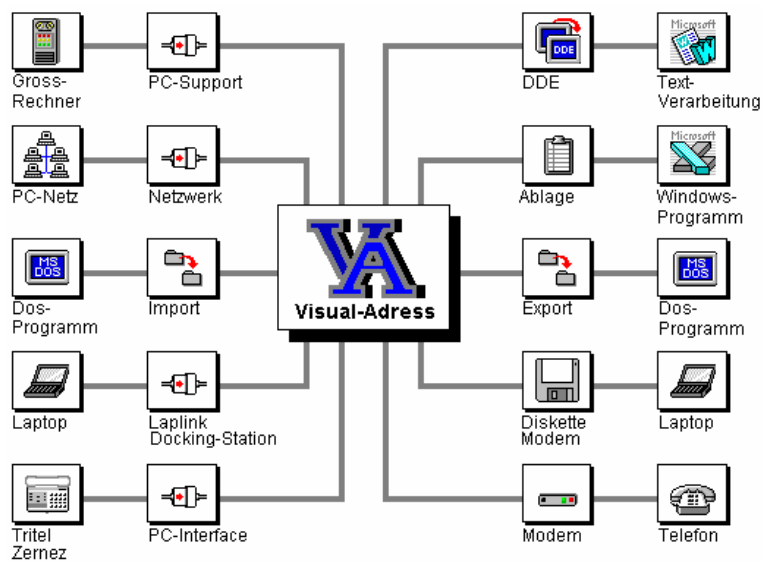


User Manual

Visual-Exchange 6.7
Visual-Synchro 6.7



16 April 2008

Abex Software AG

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Introduction

Visual-Adress is the universal tool for your Sales and Marketing Department and for your professional staff at the business front.

The Visual-Adress application suite consists of several programmes. These individual programmes are briefly introduced below. This manual describes the use of Visual-Exchange and Visual-Synchro.

Visual-Adress

The entire application is focused on convenient address management. It also links together notes, address-related documents and schedules.

- Selection windows containing master data
- Automatic testing for duplicated addresses
- Postcode file with cities and dialling codes where available
- Country-specific address editing
- Phone dialling by modem

Visual-Admin

In the database designer you can easily adapt your own data tables to your organisation's requirements, design and save the layout of screen input forms.

- Database designer for various data formats
- Online links to external data
- Mandator management of up to 255 address masters
- Screen layout for master data and notes

Visual-List Designer

The integrated list designer allows you to design all reports according to your preferences. By using drag and drop you can supplement, copy and adapt existing reports. The list designer unifies the convenient operating features of a modern word processor.

- Access to all data fields
- Group indices and arithmetic functions
- Integration of graphics, lines and frames design

Visual-Switch

This programme allows laptop users to switch between local and server based data.

Visual-Exchange

This programme allows bidirectional synchronisation of all data processed with Visual-Adress between server and client installations. This includes addresses including their add-on information, notes and dates as well as linked documents processed with e.g. Word or Excel.

Included in the basic version of Visual-Adress is the "Light" version of Visual-Exchange. This version allows to synchronise data for laptops, which are connected directly to the network, e.g. for field staff.

Visual-Synchro

This programme allows bidirectional synchronisation between Visual-Adress and Microsoft Outlook.

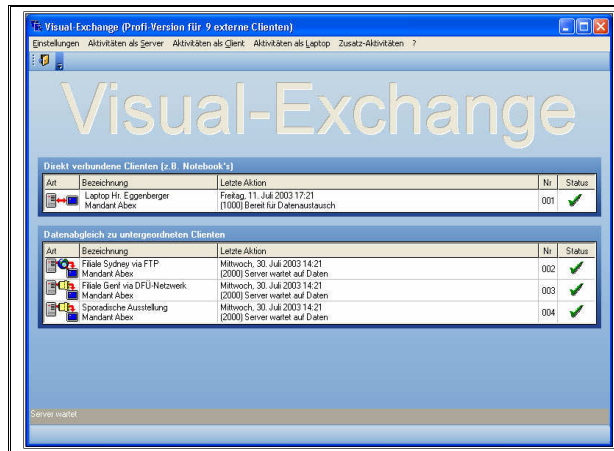
Visual-OLE (Automation Server)

Together with Visual-Adress you also received an OLE Automation Server (OLE). It allows external applications, e.g. order processing, to directly access the addresses in Visual-Adress. Examples and suggestions are included as Word documents. The OLE interface assumes programming knowledge and is mainly designed for software developers and experienced users.

Visual-Exchange

Introduction

Visual-Exchange allows synchronising all Visual-Adress data between server and client installations. This includes addresses, notes, master data and documents.



All data must exist on the main server. This server may have several sub-ordinate clients. Each client may act as server itself and have several clients. A filter may be defined for each client in order to determine which data should be synchronised. The data exchange may be started manually or automatically, provided the programme is running.

Except for the first time only new and modified data will be transferred. This is being supervised by a control database. Depending on requirements and technical possibilities the exchange can take place via LAN, WAN, router, modem or as FTP upload/download. The transfer mode may be set individually for each client.

Even though data conflicts are relatively seldom due to area or customer division, this is one of the main focuses of the program. If a record has been modified by more than one user since the last synchronisation, a form opens on the client side, letting the user decide which data are valid.

Direct data synchronisation between a laptop's local data and the data on the server via LAN does not require a Visual-Exchange license. The light version shipped as part of the Visual-Adress suite is sufficient.

Setup Overview

Prerequisites

- Visual-Adress has to be installed on the pc on which you want to install Visual-Exchange.
- Make sure that there is sufficient free space on the drives you need. For the first data synchronisation you will need approximately 110% of the space occupied by the mandator data (Abexdat.mdb and documents). Afterwards you will need approximately 5 to 10%.
- Verify that all drives/folders you need are being shared (full permission).

Visual-Exchange Server

Select this setup, if you want to use the pc as Visual-Exchange server.

Directly Connected Laptop

Setup for a laptop which is connected to the network via Ethernet.

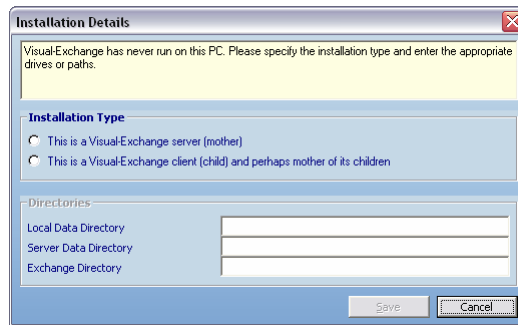
Other Clients

Setup for pc's connected via WAN, router, modem or FTP upload/download.

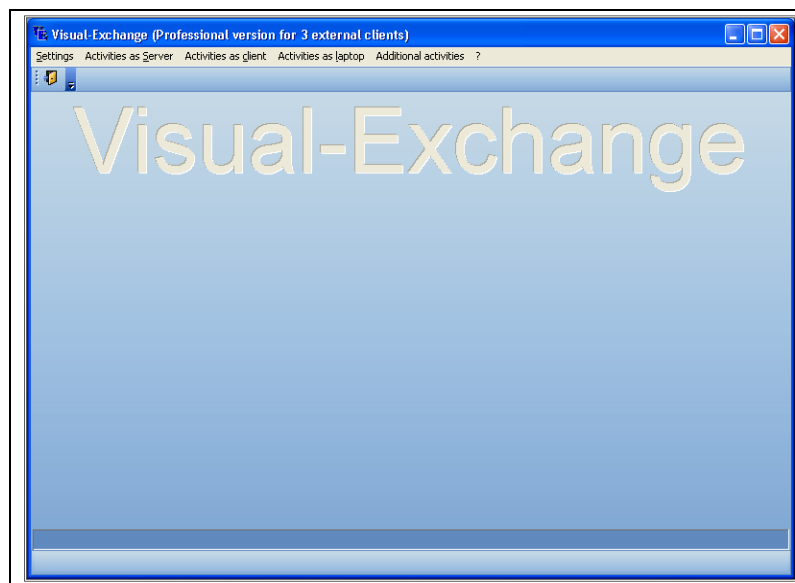
Server Setup

Start Visual-Exchange via *Start > All Programs > Visual-Adress > Visual-Exchange*.

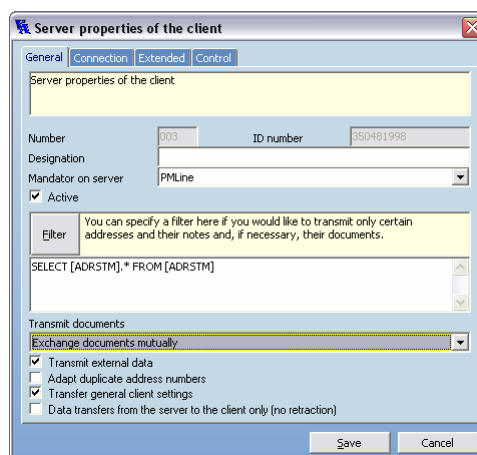
When starting up for the first time, you can now select the desired setup mode.



Select "This is a Visual-Exchange server". The data directories will be entered according to the Visual-Adress installation. They should be on a network drive. Press Save. You will now see the following form:



- Go to menu *Activities as Server* to add the first client.
- Select *New Client*



Register General

- Enter a client designation and select the mandator
- Select or create a filter, if you do not want to synchronise all data
- Select the transfer mode for documents
- Select/de-select other options

Register Connection

- Select "Network" for WAN or Modem connection, select "FTP" for FTP upload/download
- Then follow the on-screen explanations. For details see Connection Setup.

Register Extended

- Select the weekdays on which automatic synchronisation should take place
- Select the method and time interval for the first and second transfer
- Select the batch files to run before or after synchronisation. The "ConStart.bat" file contains the commands to establish the connection between server and client, the "ConEnd.bat" those to terminate the connection. These files are only required if communication between server and client is not always on or not established automatically.

Register Control

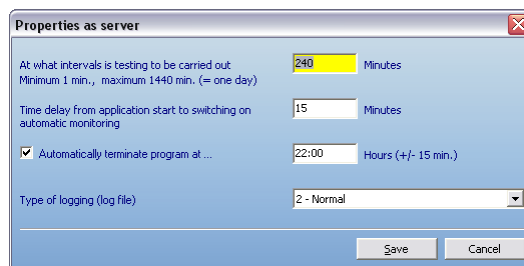
Do not make any adjustments here unless advised by Visual-Adress support!

Press "Save" to save your settings.

Menus

Settings > Properties as Server

This form allows executing the data exchange at predefined intervals, provided the program is running.



Interval:

Enter the interval in which the server should check if any data needs to be sent to or retrieved from a client.

Start-up delay:

Enter the delay after which the first data exchange should be started. This prevents the exchange to start immediately, giving you time to make any setup modifications.

Program Termination:

If the pc or server on which Visual-Exchange is installed is not running 24/24 hours, you can enter the time when the program should be terminated.

Log File:

Select from the available options.

Activities as Server > New Client

Opens the same window as described above to create an additional client.

Activities as Server > Delete Client

Deletes the selected client.

Note:

If you have deleted a client unintentionally, you will have to delete the definitions on the other side (server or client) as well and then create both again.

Activities as Server > Client Properties

Only active if a "normal" client has been set up. Then opens the client properties window as above.

Activities as Client

This menu is only being used to set properties as a client for a client, see XXX.

Activities as Laptop

This menu is only being used to set properties for a laptop client. The setup is analogue to the normal client. In the connection register only "Direct connection" is available.

Additional Activities > New recurring Import

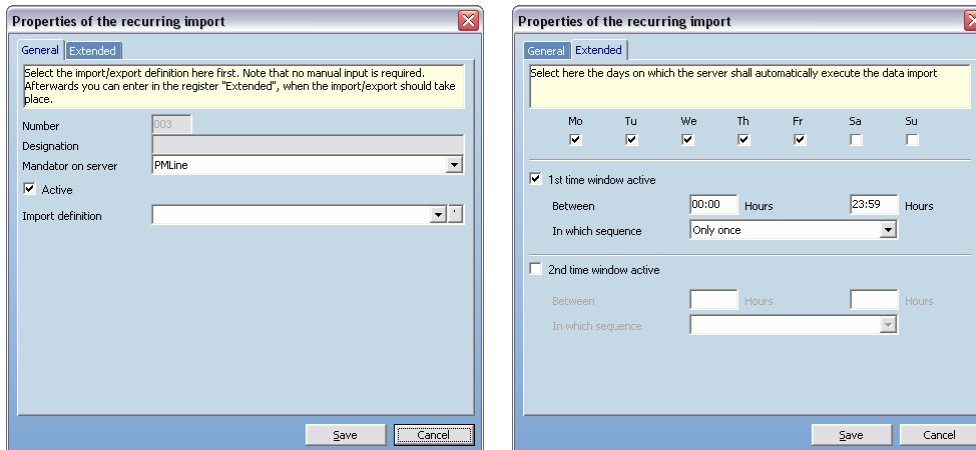
Allows to execute an import previously defined in Visual-Adress at given intervals.

Register General:

Select an import definition and name the import.

Register Extended:

Select the days and time on which the import should be executed.



Additional Activities > New recurring Export

Allows to execute an export previously defined in Visual-Adress at given intervals.

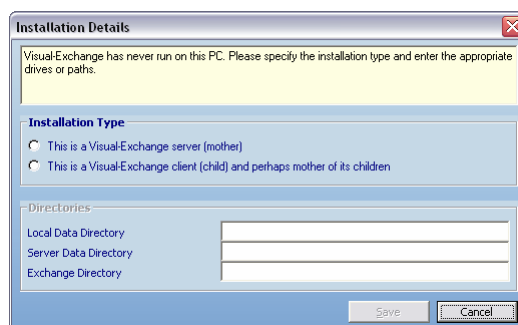
Functions analogue to recurring import.

Client Setup

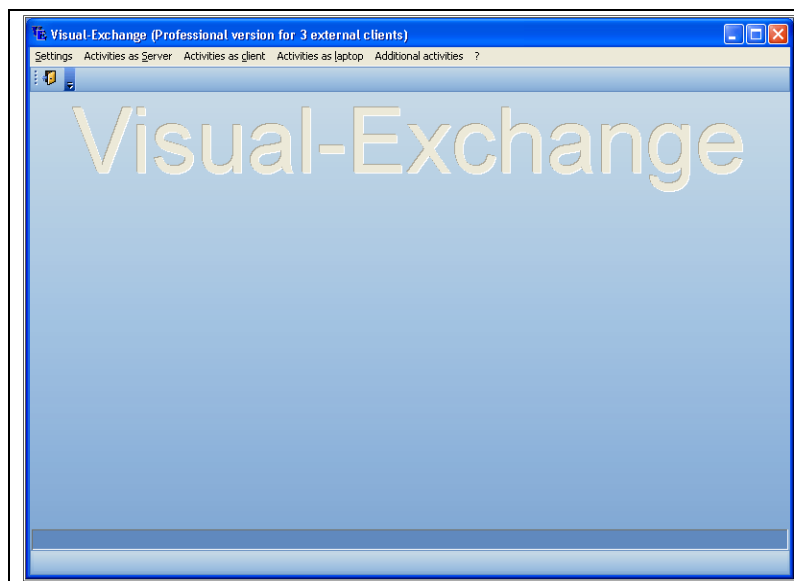
Before setting up a client, create an empty mandator on the client installation using Visual-Admin.

Start Visual-Exchange via *Start > All Programs > Visual-Adress > Visual-Exchange*.

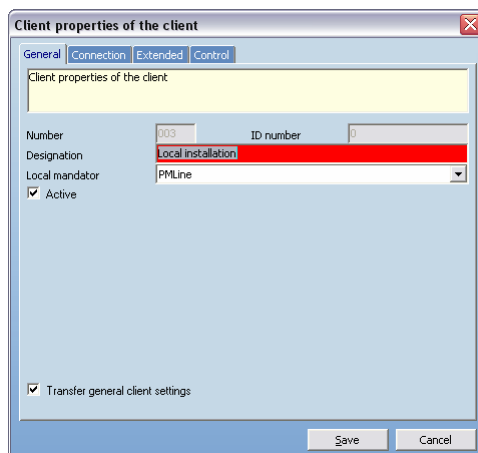
When starting up for the first time, you can now select the desired setup mode.



Select "This is a Visual-Exchange Client". The data directories will be entered according to the Visual-Adress installation. They should be on a network drive. Press Save. You will now see the following form:



- Go to menu *Activities as Client* to add the first client.
- Select New Client



Note:

Make sure that the settings entered here correspond with the settings on the server!

Register General

- Name the client
- Select the local mandator from the dropdown list

Register Connection

- Select "Network" for WAN or Modem connection, select "FTP" for FTP upload/download
- Then follow the on-screen explanations. For details see Connection Setup.

Register Extended

- Select the weekdays on which automatic synchronisation should take place
- Select the method and time interval for the first and second transfer
- Select the batch files to run before or after synchronisation. The "ConStart.bat" file contains the commands to establish the connection between server and client, the "ConEnd.bat" those to terminate the connection. These files are only required if communication between server and client is not always on or not established automatically.

Register Control

Do not make any adjustments here unless advised by Visual-Adress support!

Press "Save" to save your settings.

Menus

See

Server Setup.

Laptop Setup

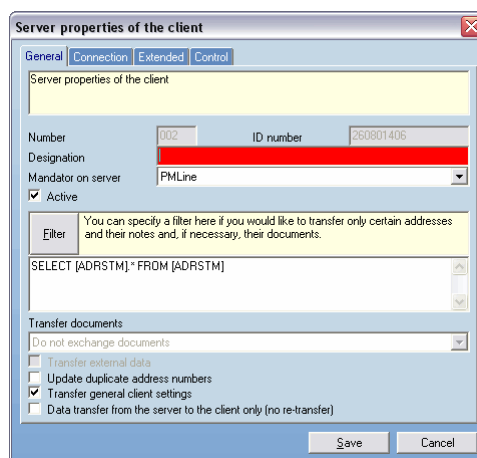
Note:

Select the Laptop installation when installing Visual-Adress on a laptop. This will automatically set up the local and the server data directories.

Before setting up the client, create an empty local mandator on the laptop using Visual-Admin.

Start Visual-Exchange via *Start > All Programs > Visual-Adress > Visual-Exchange*.

- Go to menu *Activities as Laptop* to add the first client.
- Select *New Client*



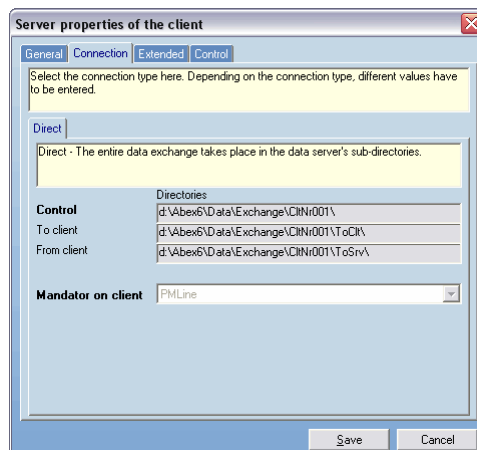
- Enter a designation
- Go to register *Connection*
- Select the mandator on the laptop

The laptop installation does not require a counterpart on the server, since it directly synchronises the server data with the local data, when the laptop is connected to the server.

Connection Setup

Direct Connection

The direct connection is only available for a laptop client which is directly connected to the network. The data exchange takes place in the subdirectories of the data server.



The directory entries will be configured automatically. They reference the local laptop installation.

Network Connection

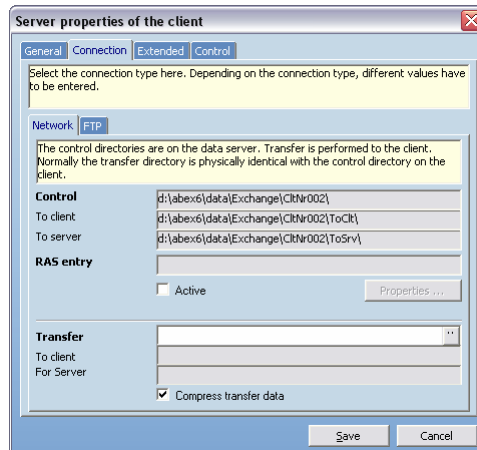
This transfer method will be selected for a different site or a field sales agent. The exchange directories are all located on the server.

If a previously defined dialup connection (RAS¹) is chosen Visual-Adress will start the connection before data transfer and terminate it again afterwards. User name and user password can be stored in the dialup setup, so that you don't have to enter them here.

The transfer directory serves as storage for data to be transferred from and to the client. Normally, this field remains empty on the server side, i.e. the server data will not be copied additionally. On the client side this directory references the transfer directory on the server.

Note:

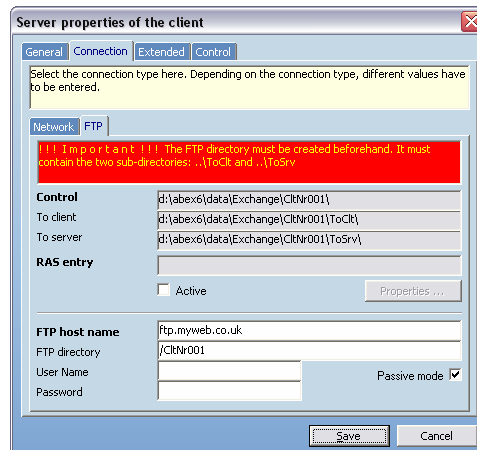
Use Network connection for VPN connections as well.



FTP Connection

This connection allows the data transfer via FTP upload/download.

- Create a dedicated folder for each client on your internet server
- Create two subdirectories: .../ToSrv and .../ToClk



Common Submenus

Start Data Exchange for Marked Client

First mark the client, then select this menu to immediately start the data exchange. Alternatively right-click the client entry and select this item from the context menu.

Attention:

The data exchange starts without additional confirmation!

¹ Note: RAS has to be selected when installing Visual-Adress

Start Data Exchange for All Clients

This menu starts the data exchange for all clients except the "direct" clients in the order of the client number.

Attention:

The data exchange starts without additional confirmation!

View Logfile

Here you can open the log files for server or client activities, depending on whether you are on the server or client side. Open the log files by double-click.

Right-clicking the client and selecting this item from the context menu always opens the client log file.

The server log files are saved in the ...\`Data\Exchange\Logfiles` directory and have the following name convention: "SrYYMMDD", where YY = Year, MM = month, DD = day.

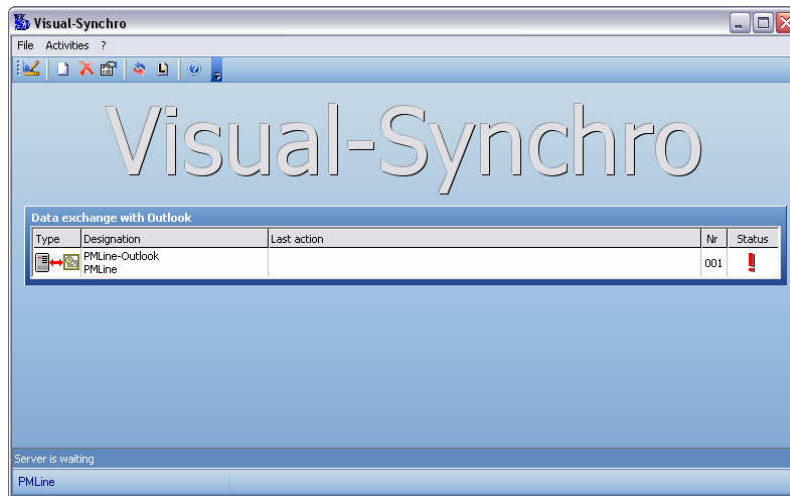
The client log files are saved in the ...\`Data\Exchange\CltNrnnn\Logfiles` directory and have the following name convention: "CIYYMMDD", where YY = Year, MM = month, DD = day.

Old log files may be deleted manually from these directories.

Visual-Synchro

Introduction

Visual-Synchro allows synchronising Visual-Adress data with Microsoft Outlook. Addresses, dates (calendar) and tasks can be synchronised.



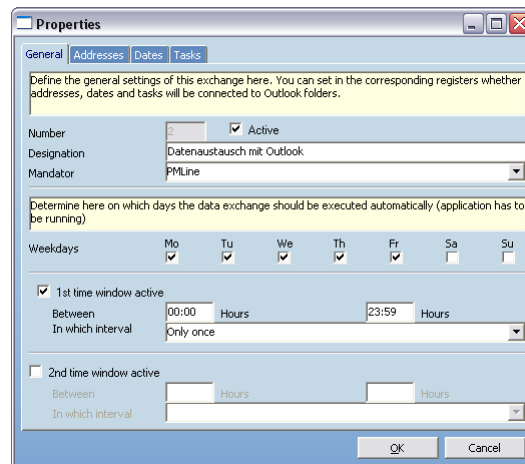
Synchronisation may take place uni- or bidirectional. Field mapping is fully configurable.

Setup

Start the program Visual-Synchro and go to menu *Activities > New Exchange* or click on the *New Exchange* icon.

In the next window you can now define the details.

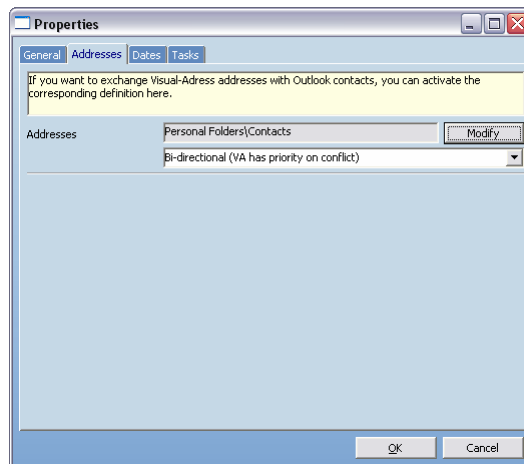
Register General



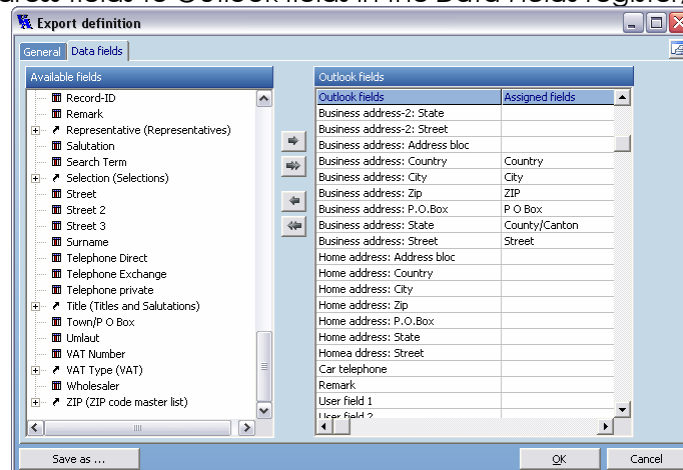
Enter a name for the exchange and select the mandator.

As in Visual-Exchange you can set time and interval for automatic data synchronisation. This requires Visual-Synchro to be running.

Register Addresses



- Press *Activate*
- Select the synchronisation mode for addresses.
- To modify the field settings press *Modify*.
- Select the format and a filter, if you do not want to synchronize all addresses in the *General* register.
- Assign Visual-Adress fields to Outlook fields in the *Data Fields* register,



Register Dates

This register shows all tables of type "Date". Activate the tables you wish to synchronise and assign the fields as above.

Register Tasks

This register shows all tables of type "Task". Activate the tables you wish to synchronise and assign the fields as above.

Having made all settings press *OK*.

Run Synchronisation

Before running the first synchronisation we recommend to make backups of both the Visual-Adress and the Outlook data, since any data modification made by Visual-Synchro on either side is not reversible.

Note: Visual-Synchro never deletes data. If an address has been deleted in Visual-Adress but still exists in Outlook, synchronisation from Outlook to Visual-Adress will recreate the previously deleted entry. This feature works in both directions and is by design.

Backup Visual-Adress Data

- Terminate all Visual-Adress programs and then copy the data file to a different location on your server or local hard disk. The default location is ...\\Abex6\\Data\\Mandantor, where Mandantor is the name of the mandator.

Backup Outlook Data

- When connected to an Exchange server, ask your administrator to backup your data.
- When working locally, copy the file Outlook.pst to a different location on your server or local hard disk. The default location of this file is "C:\Documents and Settings\myName\Local Settings\Application Data\Microsoft\Outlook\Outlook.pst", where myName is your login.