

CONTACT Sage Pro Laptop Synchronization Manual

For the CONTACT Sage Pro version 2.3

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Introduction:

The Contact Sage Pro Laptop Synchronization function lets you synchronize changes to data in the Contact Sage Pro made by two or more users who are not using the same Contact Sage Pro database over a network. (For example, an agent using a laptop outside the office and an assistant using a desktop in the office.) The functionality to synchronize data between the main database (the master Contact Sage Pro on a desktop) and a remote database (the replica Contact Sage Pro on a laptop) is built into Microsoft Access.

Please understand that synchronization creates the potential for unwanted record changes and data issues. You should only begin using synchronization if you need it. Furthermore, if you are using the Contact Sage Pro on a remote laptop for information retrieval purposes or for very limited data changes, you should probably not use synchronization, but instead simply copy the Contact Sage Pro database file from the main computer onto your laptop and recopy the same file whenever you want to get the latest copy of the Contact Sage Pro onto your laptop.

B & I Computer Consultants, Inc will not be held responsible or liable in any way for any intentional or unintentional data loss or changes resulting from synchronization.

Our systems interface with programs from Microsoft Office, Microsoft Outlook, Email Programs, Group Mail Programs, Image Viewer Programs, and PDA sync programs and applications. Many of our users also set up our systems on networks so that multiple users can use the same system at the same time. We **cannot provide support for software** that we did not create, even if our systems can interface and use that software. Further, we **cannot provide support for setting up network systems**. Our systems are designed to only pass data to outside programs. Please **direct all support questions about outside programs** to the developers of those programs.

How Microsoft Access Synchronization Works:

Microsoft Access Synchronization requires a master Contact Sage Pro databases and 1 or more replica Contact Sage Pro databases. Microsoft Access has built in functionality to create new databases ("Replicas") from an existing master database ("Contact Sage Pro"). Microsoft Access knows what data to synchronize by storing date and time stamps for all data changes, and by also storing the date and time of the last synchronization. When the databases are synchronized, Microsoft Access compares the date and time for data changes to the date and time of the last synchronization. When a change is identified, it falls into 1 of 3 categories: (assume 2 databases, A is the master Contact Sage Pro and B is the replica Contact Sage Pro)

- 1) the data in database A has changed since the last synchronization
- 2) the data in database B has changed since the last synchronization
- 3) the same piece of data in databases A and B has changed since the last synchronization

In the case of 1) or 2), the same change is applied in the other database.

In the case of 3), the user performing the synchronization is asked to resolve the conflict and select which change should be applied to all databases.

For example: (A is the Master Contact Sage Pro, B is the Replica or Laptop Contact Sage Pro)

Case 1: The nickname for contact John Smith is changed in database B to "Johnny".	Case 2: The home address for contact John Smith is changed in database A to "123 Main Street".	Case 3: The home address for contact John Smith is changed in database A to "124 Main Street" and to "125 Main Drive" in Database B.
During Next Synchronization:	During Next Synchronization:	During Next Synchronization:
The nickname for contact John Smith is changed to "Johnny" in Database A	The home address for contact John Smith is changed to "123 Main Street" in Database B	The user running the synchronization is asked to resolve the conflict and select whether the home address for contact John Smith should be changed to "123 Main Street" or "124 Main Drive" in both databases.

Installation

To set up synchronization, the first step is to convert the Contact Sage Pro into the master and create the initial replica. The replica is the copy of the Contact Sage Pro that will be copied to the Laptop and whose data will be changed outside or away from the office.

Starting the Synchronization Setup Process:

- 1) Before you setup synchronization, please backup the Contact Sage Pro.
- 2) To setup Synchronization, go to the Utility Menu (Figure 1) and click Laptop Synchronization.

Figure 1:

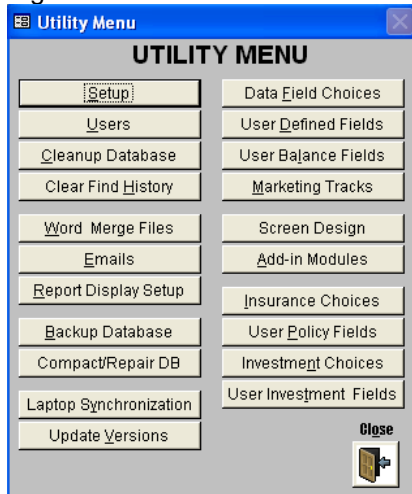
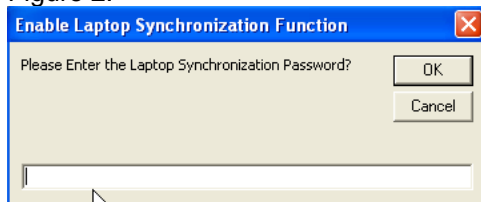


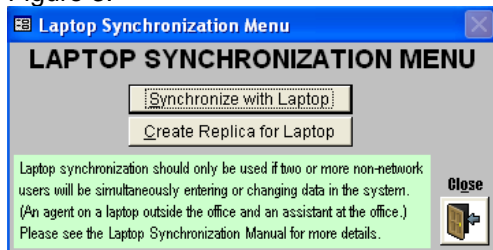
Figure 2:



To open the Laptop Synchronization menu for the first time only, enter the password "laptopsync" in figure 2.

Laptop Synchronization Menu:

Figure 3:

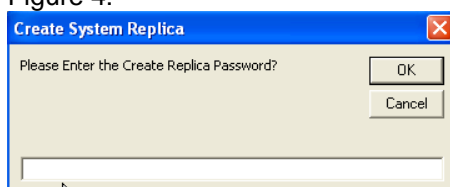


The Laptop Synchronization Menu lets you synchronize the databases together and create a Replica that will be copied to the laptop.

Creating A Replica:

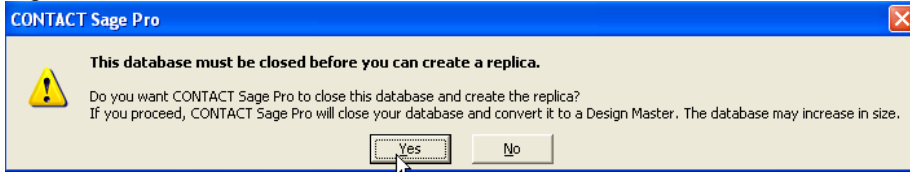
To create a new replica, click Create Replica for Laptop from figure 3, and enter the password "replica" in figure 4.

Figure 4:



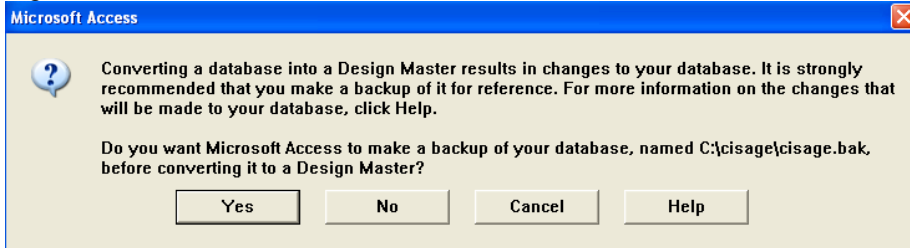
Microsoft Access will now present a series of information messages:

Figure 5:



Select whether you want to create a backup of the original database?

Figure 6:

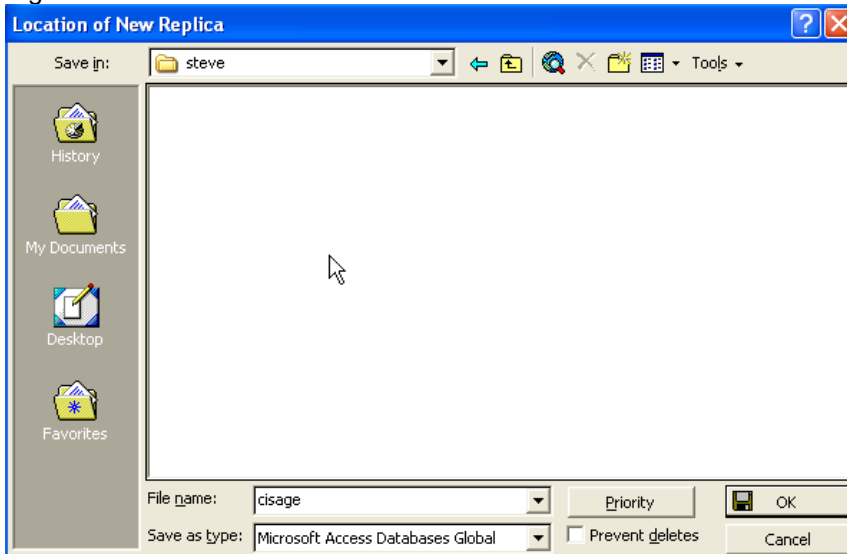


Specify a location for the replica:

The simplest way to setup synchronization is to create a directory on the main (master) Contact Sage Pro computer for each replica that you will create. To make setup and synchronization simpler, name the directory with the name of the person who will be using the replica. You should name the replica "cisage" to make sure that all Contact Sage Pro functions will work properly on the laptop.

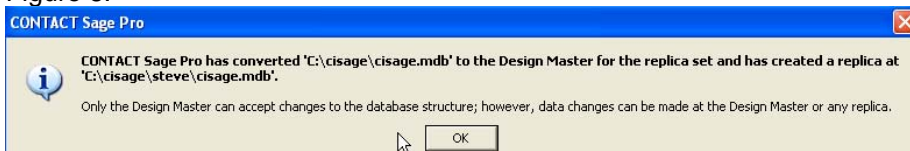
Alternatively, you can create the replica directly on the Laptop computer. This requires that you map the Laptop's c:\cisage\ folder from the master Contact Sage Pro. Keep in mind that creating the replica directly on the Laptop means that you will not be able to synchronize through email by sending the replica Contact Sage Pro by email to the location of the master Contact Sage Pro, running the synchronization and then emailing the synchronized replica Contact Sage Pro back to the Laptop location.

Figure 7:



After the replica is created, a confirmation message is displayed:

Figure 8:



Move the Replica to the Laptop:

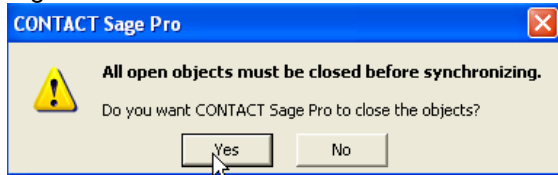
To use the replica Contact Sage Pro on the Laptop, simply copy the cisage.mdb file from the replica folder or directory on the master Contact Sage Pro computer to the c:\cisage\ folder or directory on the laptop.

Synchronizing Databases:

Each time you want to synchronize the databases, copy the replica Contact Sage Pro from the Laptop back into the replica folder on the Main Computer.

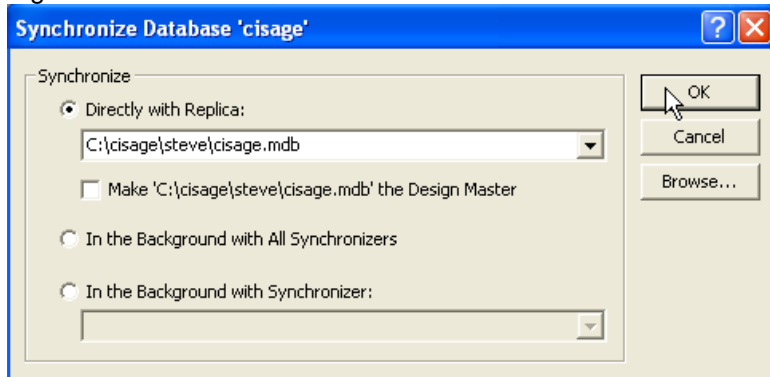
To synchronize the master and replica Contact Sage Pro, click Synchronize with Laptop in figure 1.

Figure 9:



Select the Replica to Synchronize with:

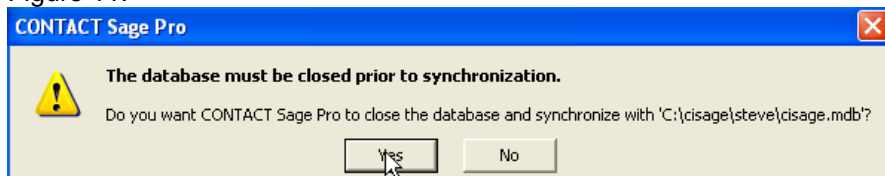
Figure 10:



Generally you want to always synchronize directly with the replica (do not check the Make '~' the Design Master checkbox.)

Follow the synchronization steps:

Figure 11:



There are two synchronization cases that can occur:

- 1) Changes in the databases are not conflicting and the synchronization finishes
- 2) There are conflicting changes in the databases meaning that the same piece of data (Phone Number, etc) was changed in both databases and is now different values.

Case 2) requires that you resolve the conflict and select which change you want to keep.

Figure 12:

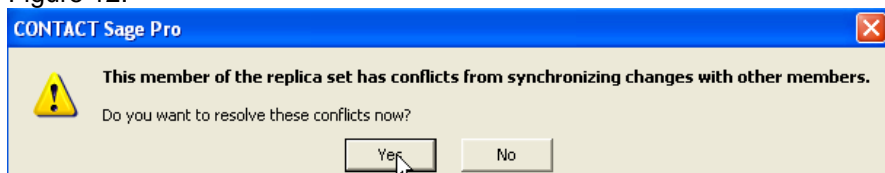
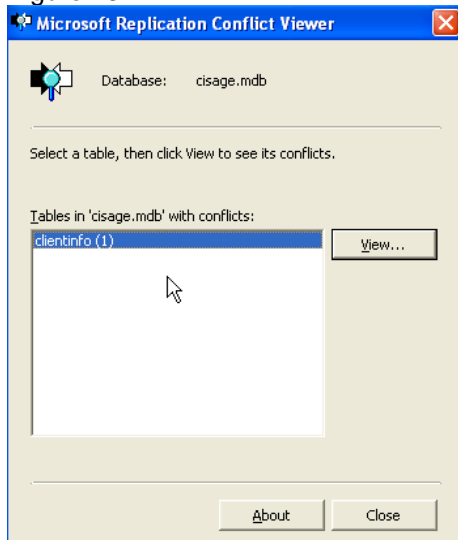


Figure 13:



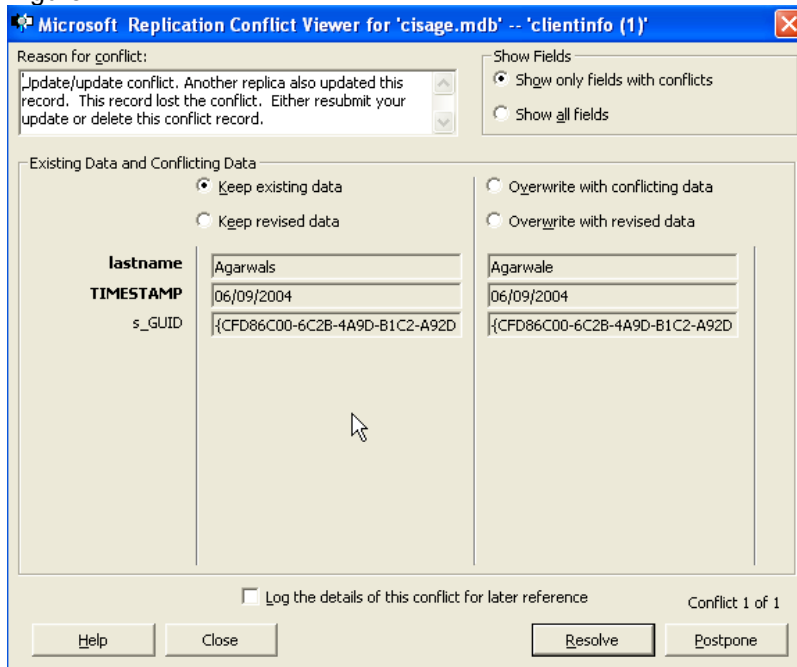
To view the conflicts, select a table from the list and click view.

For each conflict, you will have to select which action to take. In most cases, you want to rectify the conflict by selecting the value you want in all databases.

Keep Revised Data: both databases will be set to the value in the left column

Overwrite with Revised Data: both databases will be set to the value in the right column

Figure 14:



After you have selected the action, click resolve.

You should continue the conflict resolution process until there are no more tables in the Microsoft Replication Conflict Viewer, figure 13.

Finishing the Synchronization Process:

To finish the synchronization process, copy the cisage.mdb file from the replica folder or directory on the master Contact Sage Pro computer to the c:\cisage\ folder or directory on the laptop.

Synchronizing Contact Sage Pro databases in different Offices/Locations:

The laptop Contact Sage Pro replica user does not have to come into the office to synchronize. They can synchronize through email by sending the replica Contact Sage Pro by email to the location of the master Contact Sage Pro, running the synchronization and then receiving and replacing synchronized replica Contact Sage Pro through email.

Updating a Contact Sage Pro System that uses Laptop Synchronization:

The contact sage pro update works by copying all system data into a new version shell. If you are using synchronization, you must follow several additional steps before and after you update.

- 1) Synchronize all changes from all replicas before you update
- 2) Delete all of the replica databases
- 3) Run the Update
- 4) Recreate the Replica Databases in their former directories