

Setting up the Notebook Module



ADVANTAGE itself is the same on the laptop as it is on any other workstation. Only the utility we call the **Notebook Module** is different. It is used to transfer information back and forth between the server and the laptop.

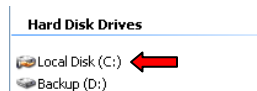
Only *new* estimates, invoices, customers, prospects, contacts, and any modifications to these that have not yet been uploaded to the server can be uploaded to the server from the notebook. Any changes to existing estimates, invoices, customers, or prospects which were downloaded from the server can not be uploaded. Changes to product codes, work orders, or any other pricing or system defaults are not uploaded and should not be made accessible. You need to limit **Security** access for all employee(s) on the notebook computer so that all they can do is enter invoices and estimates, schedule contacts, and *add* customers and prospects.

Be sure to limit **Security** access for all employees using the notebook computer so that all they can do is enter invoices and estimates, schedule contacts, and *add* customers and prospects. This should be done **BEFORE** you download information from the server for the first time. Changes to product codes, work orders, or any other pricing or system defaults are not uploaded and should not be accessible to the employees using the notebook computers.

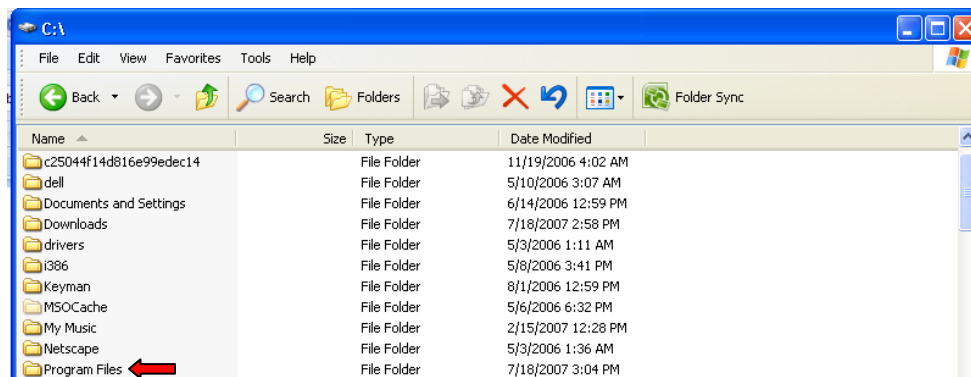
Setting up the Utility

Make sure to close out of **ADVANTAGE** *completely* before proceeding.

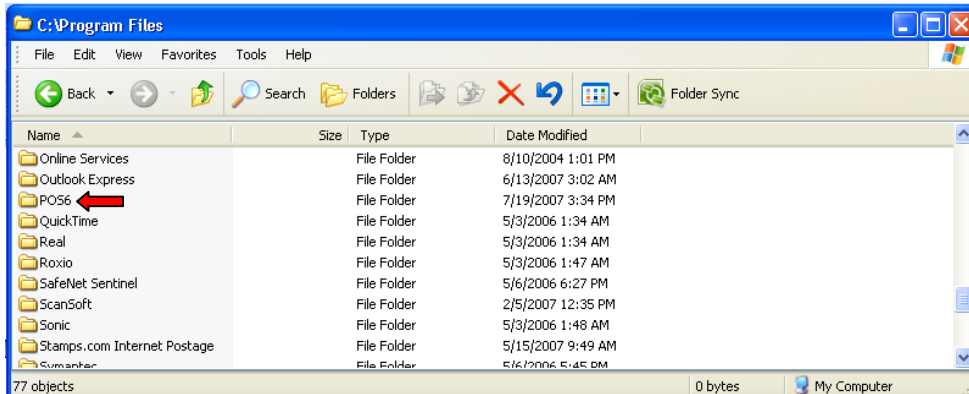
- ✚ Access **My Computer** by either clicking on the icon on the desktop: , or by accessing it through the  menu.
- ✚ Double click on the C:\ drive:



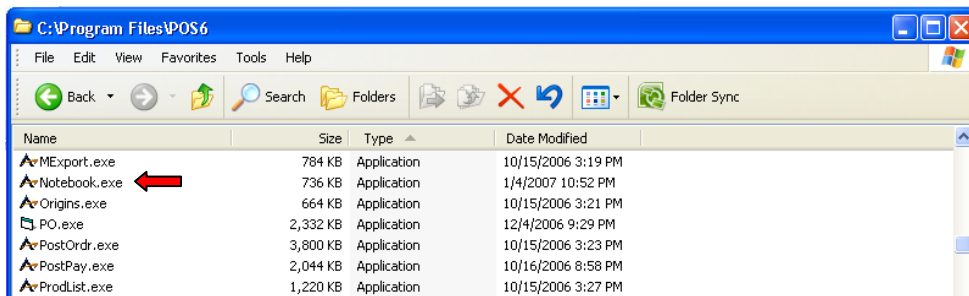
- ✚ Double click on **Program Files**:



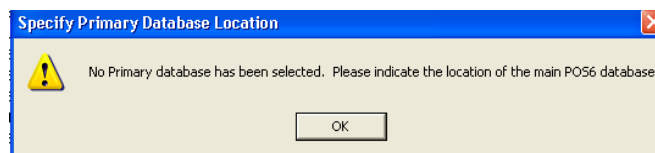
✚ Double click on the POS6 folder:



✚ Double click on **notebook.exe** to open the notebook module:

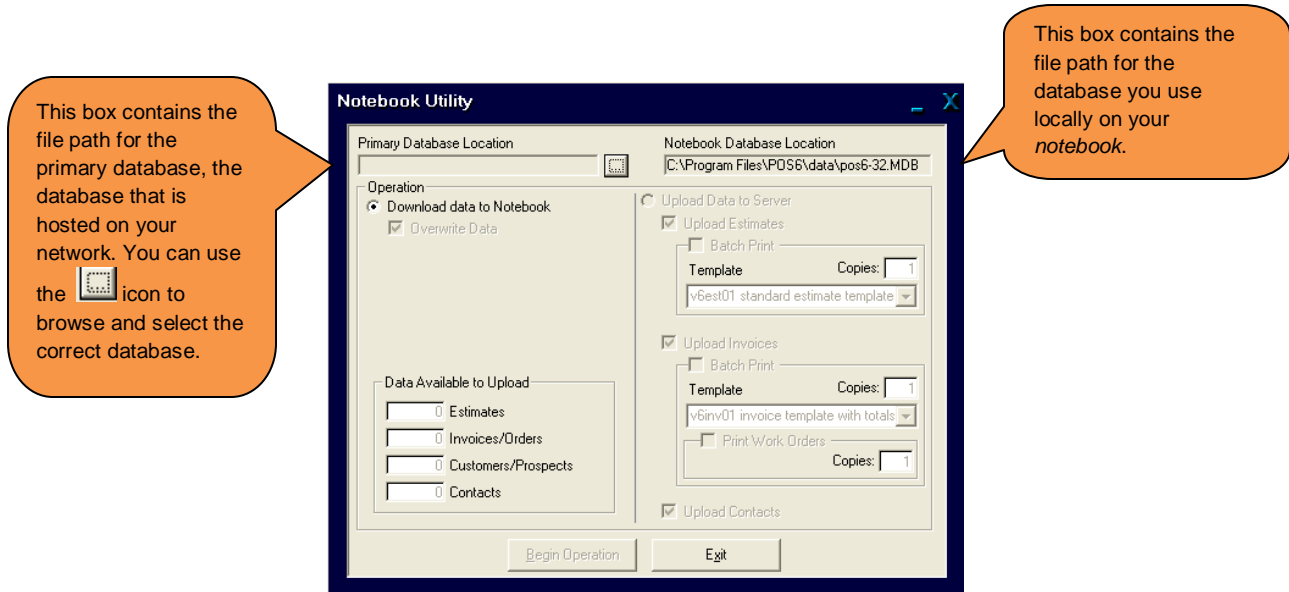



The first time that you click on **notebook.exe**, you will receive a message telling you that you need to tell the notebook module which database on the network is the server. This will be the database that your notebook module will sync with:



✚ Click **OK**

➤ **ADVANTAGE** opens the **Notebook Utility** screen:



This box contains the file path for the primary database, the database that is hosted on your network. You can use the  icon to browse and select the correct database.

This box contains the file path for the database you use locally on your *notebook*.

➤ Under **Primary Database Location**, use the ellipses icon to browse and select the location of your primary database- not the one that your notebook works off of when it is not connected to the network. The location of your server's database will be determined by how you've networked the workstations.

➤ To synchronize your notebook with the primary database, click **Download Data to Notebook**. Then click **Begin Operation** to perform the download.

This operation will overwrite (replace) what is on your notebook with the data that is on the server. After this initial setup of the notebook module, you will perform this operation *after* you have uploaded the new information that was entered into the notebook computer.

Your notebook computer will now be ready to be used after synchronizing for the first time with the server's database. After you have entered in estimates, invoices, and customers into the notebook while in the field or otherwise out of the office, you can then upload that information to the server. After you have uploaded, you then download the server's updated database and overwrites (replaces) what is in the notebook- making the notebook reflect what information was on the server since the last download.

Invoice and estimate numbers that are assigned in the notebook **are not permanent**. While uploading to the server, **ADVANTAGE** reassigns invoice and estimate numbers that are sequential to those in the server's database. If this were not done, you could have duplicate invoice and estimate numbers.

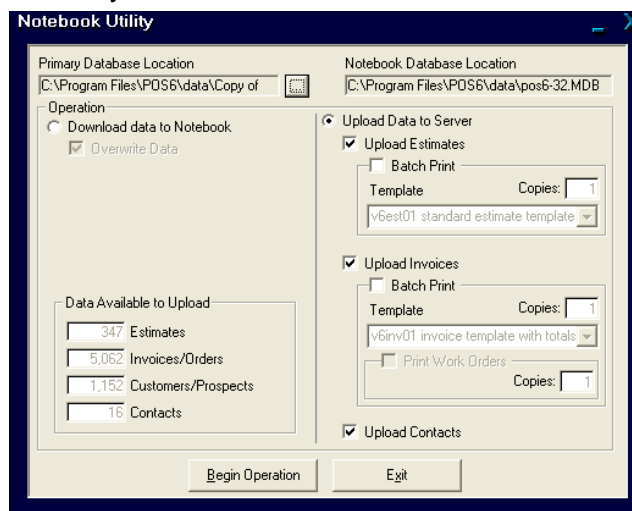
Uploading Information from the Notebook to the Server

You have to upload the information from the notebook computer to the server so the information you have entered can be accessed by all workstations. When you upload, you can also batch-print all of the invoices, estimates, and work orders.

Only *new* estimates, invoices, customers, prospects, and contacts (or changes to any of these *that have not yet been uploaded to the server*) can be uploaded to the server from the notebook. Any changes to existing estimates, invoices, customer, or prospects that were downloaded from the server *cannot* be uploaded.

Remember, invoice, estimate, and customer numbers that have been assigned on the notebook are temporary, and will be reassigned by **ADVANTAGE** on the server.

- ✦ Open the notebook utility:



- ✦ Click **Upload Data to Server**
- ✦ Click **Upload Estimates** – if you want to transfer estimates to the primary database
- ✦ Check **Batch Print** if you want to print a copy of each estimate
 - ✦ Enter the number of **copies** of each estimate to print
 - ✦ Select the **template** that you want to use for all of the estimates
- ✦ Click **Upload Invoices** if you want to transfer invoices to the main database.
- ✦ Check **Batch Print** to print a copy of each invoice
 - ✦ Enter the number of **copies** of each invoice to print
 - ✦ Select the **template** that you want to use for all of the invoices
- ✦ If you want a printed copy of each work order click **Print Work Orders** and specify the number of **copies** of each work order you want printed.
- ✦ Click **Upload Contacts** if you want to transfer automatically and manually scheduled contacts to the primary database
- ✦ **Customers** and **prospects** are always uploaded to the primary database.
- ✦ Click **Begin Operation** to begin the upload

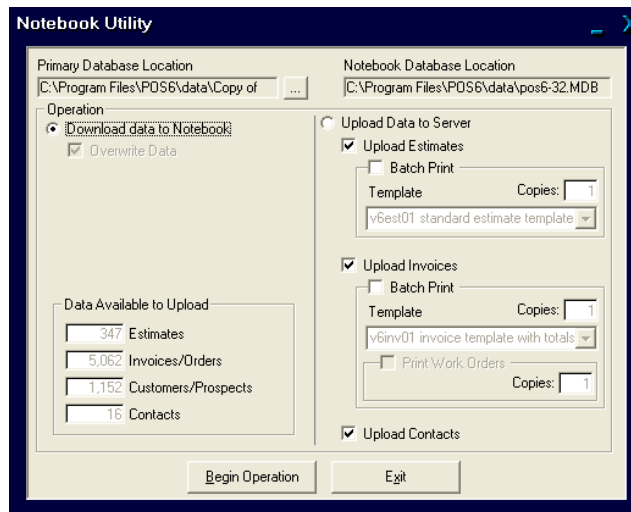
Because **ADVANTAGE** reassigns the invoice and estimate numbers assigned to invoices and estimates on the notebook module, reports will print listing all of the uploaded invoices and estimates showing both the notebook module's number and the primary database's number. This will help to avoid confusion about invoice and estimate numbers later if a customer has an invoice or estimate that was printed from the notebook before the data was synchronized with the server.

Downloading Information from the Server to the Notebook

After you've transferred the new information from the notebook to the server, you need to download the server's updated database to the notebook. This will replace the information that is on the notebook with the server's database.

Be sure you've uploaded the new data before you attempt to download. If you do it in the wrong order, your new information on the notebook will be lost.

✚ Open the **Notebook Utility**:



✚ Click **Download data to Notebook**

✚ Click **Begin Operation** to download the server's information into the notebook

Changing the Notebook into a Workstation

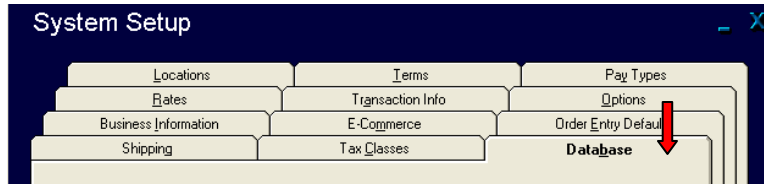
The **Notebook Module** allows you to use a notebook (laptop) computer as a *limited* workstation when you're away from the office and you're not connected to the network. It does **not** act as a full workstation, since there are certain areas of **ADVANTAGE** that don't get uploaded when you transfer data to the server. Remember, you're limited as to what you can or can't change on the notebook.

If you want to be able to have full access to the software and have the notebook act like any other workstation, you must first hook it up to the network. The notebook cannot act like a regular workstation unless it is connected to the network and looking at the server's database. Normally, the notebook is looking at its own C drive and only uploads data to the server.

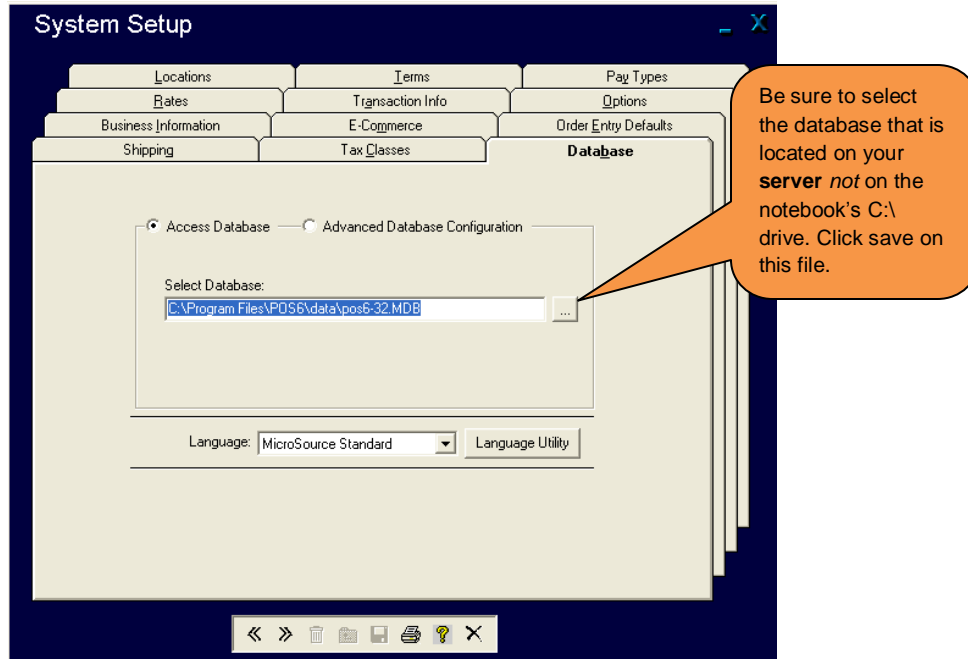
- ✚ Connect your notebook to the server
- ✚ Open the **Notebook Utility**
- ✚ Following the *Uploading Information from the Notebook to the Server* instructions given above, upload the information from your notebook to the server so that your server's database will have the most current changes made in the notebook.
- ✚ Open **ADVANTAGE**
- ✚ Select **System** then **System Setup**:



- Click on the **Database** tab:



- Use the ellipses icon next to the database file path:



- Close **ADVANTAGE**
- Reopen **ADVANTAGE**

The notebook computer is now a regular workstation. You are no longer limited as to what you can change, unless the security for the user name you are using is limited. You may need to use one user name for the notebook and a different one for when you're working as a regular station. If your security is not limited when you are using it as the notebook module, you may make changes that aren't going to be uploaded.