Attaché Alex

Guided Tour

Attaché Alex for Business Partner

This guided tour shows you how to:

- Obtain the AlexConnect software
- Install AlexConnect
- Set up sender details for Customer documents
- Set up receiver details for Customer documents
- Send a sample invoice via Attaché Alex
- Set up sender details for Supplier documents
- Set up receiver details for Supplier documents
- Send a sample order via Attaché Alex
- Register with Attaché Alex
- Visit the Attaché Alex website
- Print and save Attaché Alex documents

About Attaché Alex

Attaché Alex uses 21st century technology to deliver tangible efficiencies and substantial savings to your business. Attaché Alex gives you a competitive advantage by replacing outmoded communications methods, such as surface mail and the fax machine, which are no longer appropriate for today's businesses.

Attaché Alex delivers business documents to your customers and suppliers directly from your desktop. Alex will inform you when the documents are delivered and let you know if there were any delivery problems. Alex can also track the status of registered documents.

With a well planned implementation, Attaché Alex will save you money and help to improve your business efficiency.

About the Attaché Alex Guided Tour

The Attaché Alex Guided Tour takes you through the process of downloading, installing and setting up Attaché Alex and then sending a sample invoice and sample order to yourself.

The Guided Tour uses Business Partner Sample Data so that you become familiar with Attaché Alex before using your actual accounting data.

To use Sample Data, sign on to Business Partner with the *user name* of **Sample.** At *Next Selection* choose **Select Company** and then **Accept (F9)**. At the Company Name screen, choose **Sample Data** and then **Accept (F9)**.

Before you begin

To successfully use Attaché Alex, you need:

- an Internet connection to send, receive and read documents sent via Attaché Alex.

  Note: While Attaché Alex does not require a permanent Internet connection, now might be the right time to consider switching your business to 24 x 7 access. Switching to a permanent Internet connection is just like installing a dedicated fax line. At first, a dedicated fax line seemed a little expensive and the monthly line rental was a pain, but doing business made it a necessity. Moving to a permanent Internet connection is a bit like this, and the same convenience and benefits you gained from the dedicated fax line will soon become apparent when you move to "Internet on demand".

- an HTML-capable email program. (Most popular email programs, such as Microsoft Outlook and Outlook Express, are HTML-capable.)

- a version 4 (or later) web browser. Attaché Software recommends Microsoft Internet Explorer 5.0 (available free from www.microsoft.com/downloads).

- Business Partner version 1.23.000 or later.

The latest version of Business Partner can be downloaded from the Software Updates section of the CBP Member Services website at www.attachesoftware.com/cbpmembers. The website also provides instructions for downloading and installing the software. Alternatively, you can obtain the latest version of Business Partner on CD-ROM from Attaché Software.

If you are not sure which version of Business Partner you currently have, start Business Partner and choose **Tools | Company | System | System Information**. The version number is displayed together with other system information.

Obtain AlexConnect

Here we discuss how to download the AlexConnect software from the *Test drive* section of the Attaché Alex website.

Alternatively, you can obtain the software from the Business Partner CD-ROM (in which case, proceed to *Install AlexConnect* on page 3).

Download the AlexConnect User Guide
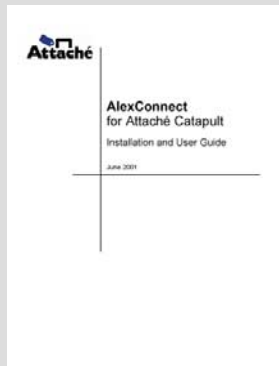
Attaché Software recommends that you download the AlexConnect User Guide from the Attaché Alex website.

The user guide is located on the same web page as the AlexConnect software download together with step-by-step instructions on how to download and use the file.

Download the AlexConnect software

1. Start your web browser. In the Address box, type **http://www.attacheonline.com/alex** and then press **Enter**.

2. On the Attaché Alex homepage, click the **Test drive** link.

3. Click the **Download AlexConnect for Business Partner** link.

4. Complete the form and then click the **Download Now** button.

5. Scroll down the page and then click the **Download Alex** image.

6. If asked, choose to save the file to disk/hard drive.

7. Click **Save** to save the file to your download folder (for example, C:\Download).

Expand the downloaded files

1. Start Windows Explorer and go to your download folder.

2. Double-click the file you downloaded in the preceding steps.

3. WinZip asks you to nominate a folder in which to expand the files. Accept the default by clicking **Unzip**. The files expand into a subfolder off the download folder.
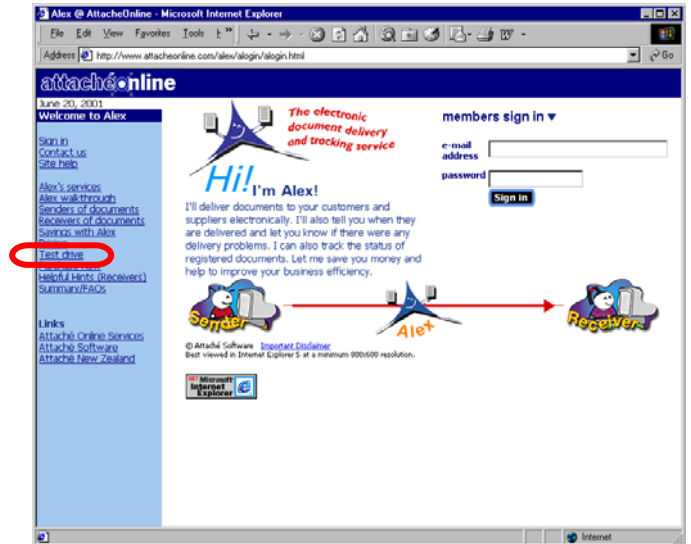
Install AlexConnect

Install AlexConnect into your **Business Partner** program directory.

Check the location of your Business Partner program directory

1. Start Business Partner and sign on as you normally do.

2. Choose **Tools | Company | System | System Status** and note the *Current Directory* (for example, **C:\ATTACHE**), which is displayed near the top left of your screen.

3. Close Business Partner.

Install AlexConnect

1. Ensure that no one is using Business Partner.

2. If you are installing from a CD-ROM, place it in the CD-ROM drive. The installation menu starts automatically. From the main menu, choose **Install AlexConnect for Business Partner.**

    If you are installing from an Internet download, locate the folder in which you expanded the AlexConnect download files (see *Expand the downloaded files* on page 2) and double-click **setup.exe**.

3. Choose **Next.**

4. When asked to choose the Destination Folder:

    If your Business Partner programs are installed in **C:\ATTACHE**, accept the folder by choosing **Next**.

    If your Business Partner programs are not installed in **C:\ATTACHE**, choose **Browse** and locate the folder where your Business Partner programs are installed. Choose **OK** to accept the folder and **Next** to continue the installation.

5. When the installation is complete, choose **OK**, if asked. If you installed from a CD-ROM, remove it and store it in a safe place.

Attaché Alex tip

If you begin to use AlexConnect with your live data, install the program on every computer from which your organisation runs Business Partner.

For more information, see *Setting Up AlexConnect* in the ***AlexConnect Installation and User Guide***.
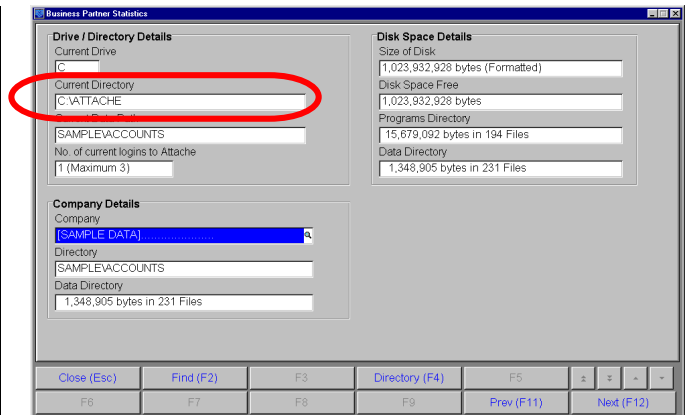
Sender details (for customers)

Your sender name and email address appears on each document you send via Attaché Alex.

You set up sender details separately for Customer and Supplier documents so that you can use a different address for each if you wish.

Here we set up sender details for Customer documents.

Set up sender details for Customer documents

1. Start Business Partner and, in the Sample Data company, choose **Tools | Company | AlexConnect | Customer Delivery Address**. This opens the AlexConnect Document Delivery Address Manager.

2. Choose **Edit | Sender properties.**

3. In the *Display name* field, type your sender name as you want it to appear on each document.

4. In the *Email address* field, type your email address.

5. Click **OK** to close the Sender's name and Email address dialog box.

   Keep the AlexConnect Document Delivery Address Manager open and proceed to *Customer's details* on page 5.
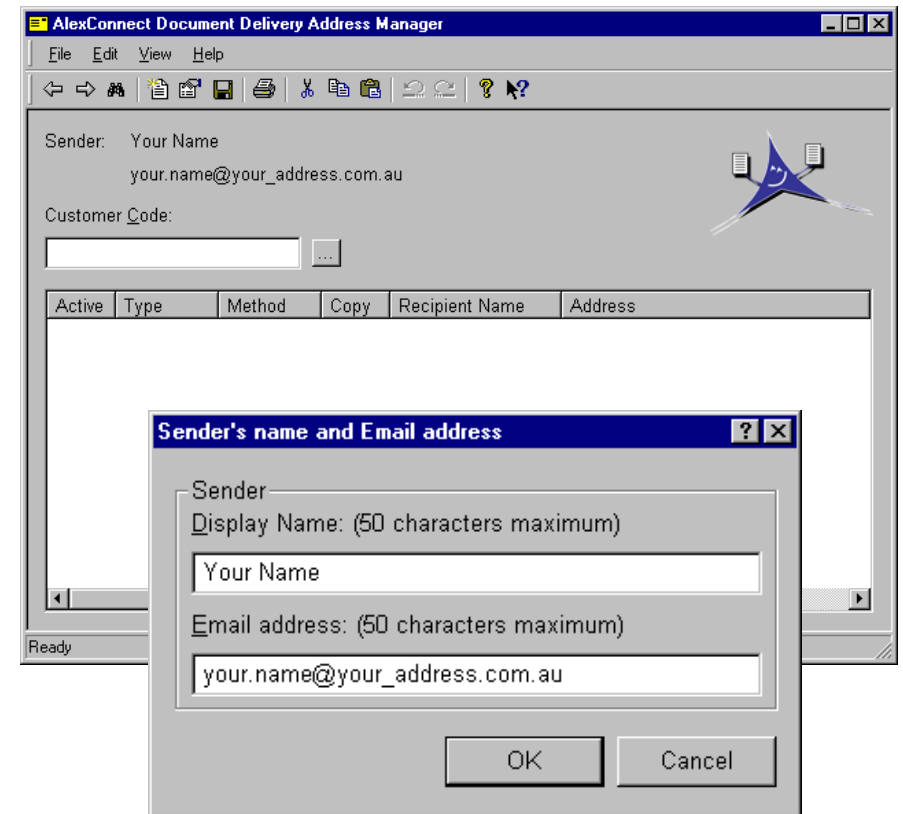
Attaché Alex tip

When using Attaché Alex with your live company data, use a generic email address (such as mycompany.accounts@isp.com) rather than the email address of a particular employee. Using a generic email address avoids having to change your sender details if a staff member leaves your company or is absent for a period of time.

Customer's details

AlexConnect needs to know the delivery addresses of customers to whom you want to deliver documents via Attaché Alex.

Here we set up email details for the Sample Data customer, Abel Sound Systems.

Set up receiver details for Customer documents

1. With the AlexConnect Document Delivery Address Manager open (from the previous page), at the *Customer Code* field, type **ABEL**.

    If you closed the AlexConnect Document Delivery Address Manager, choose **Tools | Company | AlexConnect | Customer Delivery Address** to re-open it.

2. Choose **File | New (Ctrl+N)** to open the Document Delivery Address Details dialog box.

3. Complete the dialog box with the appropriate details, click **OK** and then close the Address Manager.

    Ensure you use <u>your email address</u> for this trial.

Sending Customer documents

Here we create and then send a sample invoice for Abel Sound Systems.

Because you entered your own email address as the email address for Abel, the invoice will be sent via Attaché Alex to you.

Send a sample invoice via Attaché Alex

1. Make sure you are connected to the Internet.

2. In your Business Partner Sample Data, choose **Settings | Customers | Options | Invoicing Options** and set **Print At Time Of Entry** for *Invoices* to **Yes**.

3. Create a Customer invoice for Abel Sound Systems.

4. When you choose **Accept (F9)**, AlexConnect will package and send the invoice via Attaché Alex.

   Depending on the speed of your Internet connection, within a short time you will receive the invoice in your email inbox.

Sender details (for suppliers)

On pages 4 to 6 we set up and then sent a Customer document (invoice) via Attaché Alex. On pages 7 to 9 we follow a similar process to set up and send a Supplier document (purchase order).

Here we set up sender details for Supplier documents.

Set up sender details for Supplier documents

1. Start Business Partner and, in the Sample Data company, choose **Tools | Company | AlexConnect | Supplier Delivery Address**. This opens the AlexConnect Document Delivery Address Manager.

2. Choose **Edit | Sender properties.**

3. In the *Display name* field, type your sender name as you want it to appear on each document.

4. In the *Email address* field, type your email address.

5. Click **OK** to close the Sender's name and Email address dialog box.

   Keep the AlexConnect Document Delivery Address Manager open and proceed to *Supplier's details* on page 8.

Sender's name and Email address

Sender
Display Name: (50 characters maximum)

Your Name

Email address: (50 characters maximum)

your.name@your_address.com.au

OK   Cancel

Attaché Alex tip

You can use a pair of email addresses for sender details (one for customers and another for suppliers) and link the email addresses at the Attaché Alex website.

For more information, see *Using the Attaché Alex website* in the **AlexConnect Installation and User Guide**.

Supplier's details

AlexConnect needs to know the delivery addresses of suppliers to whom you want to deliver documents via Attaché Alex.

Here we set up email details for the Sample Data supplier, Adam Bros Pty Ltd.

Set up receiver details for Supplier documents

1. With the AlexConnect Document Delivery Address Manager open (from the previous step), at the *Supplier Code* field, type **ADAM**.

   If you closed the AlexConnect Document Delivery Address Manager, choose **Tools | Company | AlexConnect | Supplier Delivery Address** to re-open it.

2. Choose **File | New** (Ctrl+N) to open the Document Delivery Address Details dialog box.

3. Complete the dialog box with the appropriate details, click **OK** and then close the Address Manager.

   Ensure you use your email address for this trial.

Attaché Alex tip

You can choose to send any document to multiple delivery addresses. For example, you might set up to email each order to the supplier and to your warehouse.

For more information, see *Setting up document delivery addresses* in the **AlexConnect Installation and User Guide**.

Sending Supplier documents

Here we create and then send a sample purchase order for Adam Bros Pty Ltd.

Because you entered your own email address as the email address for Adam Bros on page 8, the order will be sent via Attaché Alex to you.

Send a sample order via Attaché Alex

1. Make sure you are connected to the Internet.

2. In Business Partner, choose **Settings | Suppliers | Options | Purchasing Options** and set **Print At Entry Time** for *Purchase Orders* to **Yes**.

3. Create a purchase order for Adam Bros Pty Ltd.

4. When you choose **Accept (F9)**, AlexConnect will package and send the purchase order via Attaché Alex.

    Depending on the speed of your Internet connection, within a short time you will receive the purchase order in your email inbox.
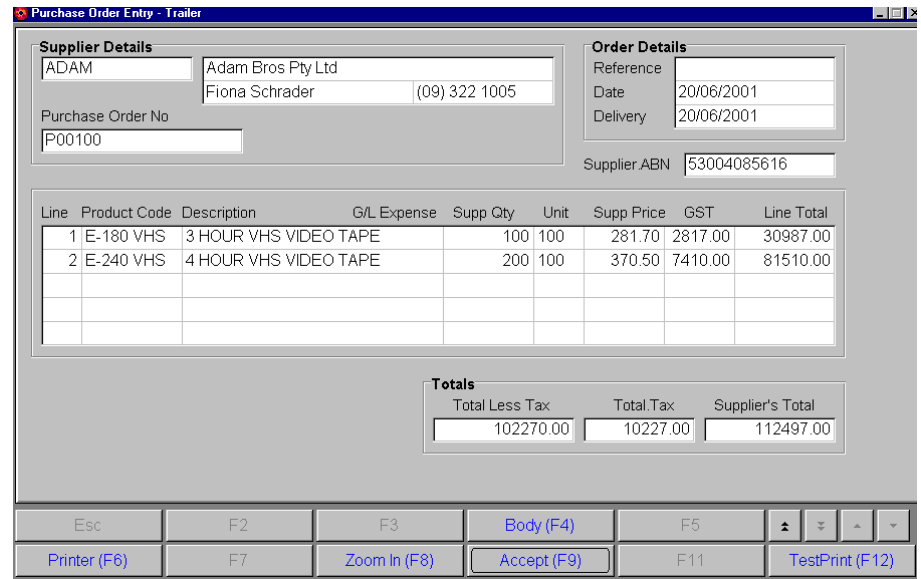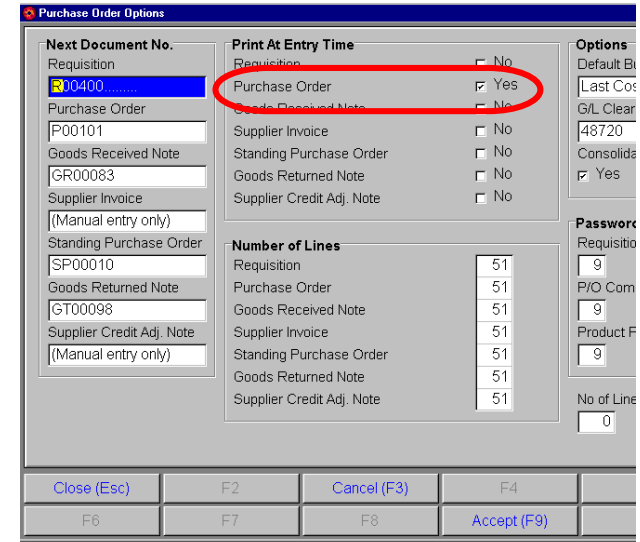
Register with Attaché Alex

When Attaché Alex receives your first email, you are automatically registered with the service and you will receive a **Welcome email**.

The Welcome email tells you how to sign in at the Attaché Alex website and provides your temporary password.

Sign in at the Attaché Alex website

1. Start your web browser.

2. In the Address box, type **http://www.attacheonline.com/alex** and press **Enter**.

3. At **members sign in**, type your email address and your password (which you received in the Welcome email).

4. Click **Sign in**.
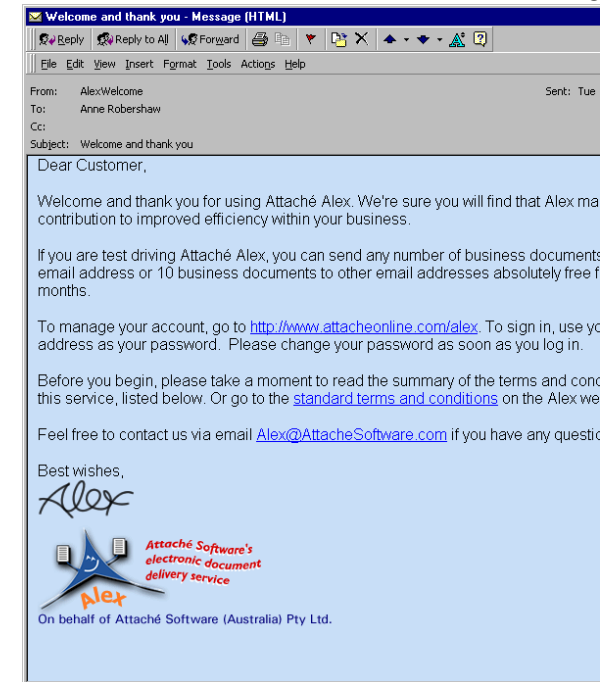
Attaché Alex tip

The appearance of the Attaché Alex website and the Welcome Email may be different to what you see here. This is because different browsers interpret web pages differently.

Microsoft Internet Explorer version 5.0 is the most popular browser in use today. Because virtually all web pages are created to be compatible with it, Attaché Software recommends that you use it as your browser.

Internet Explorer 5.0 is available free at the Microsoft website at www.microsoft.com/downloads
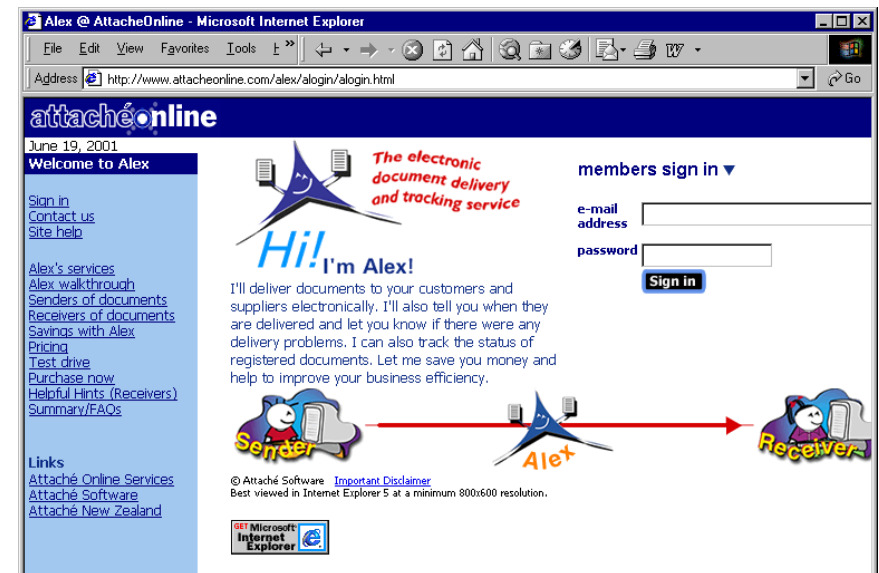
Tracking documents

Attaché Alex tracks the documents that you send. So, for example, you can check whether a customer has opened an invoice that you sent by email.

Use the Document List form

After signing in at the Attaché Alex website, you arrive at the Document List form, from which you can display a list of documents that you have sent.

Here we will display a list of all documents you have sent via Attaché Alex:

1. On the Document List form, select **Any** for each of the four categories.

2. Click the **List Now** button to see the results.

3. Listed are the two sample documents you have sent to yourself during this Guided Tour.
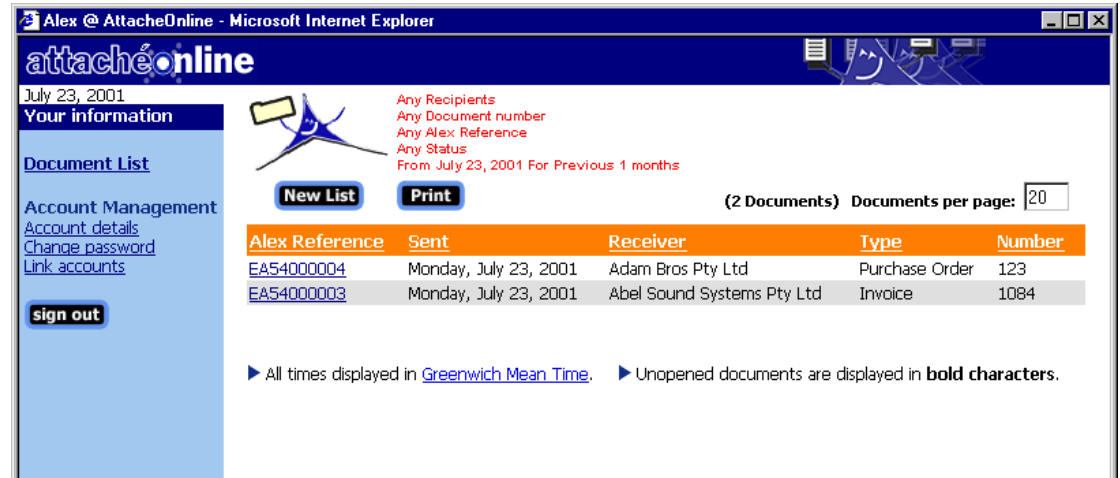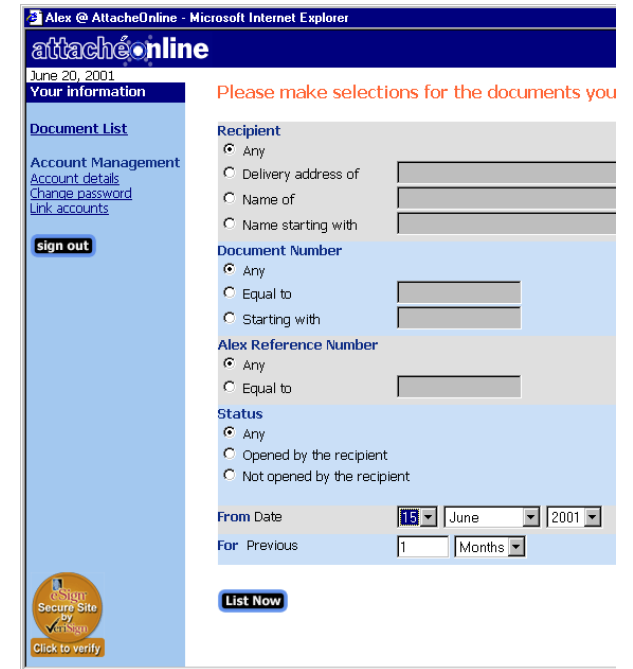
Attaché Alex tip

As well as checking on the status of documents sent via Attaché Alex, at the website you can change your password, link multiple Attaché Alex accounts and change your account details.

Printing and saving received documents

After viewing the document on the screen, receivers will probably want to print a hard copy and/or save the document to their hard drive. Because Attaché Alex uses Internet technology, the printing of documents relies on the receiver's email and browser software.

## Print the invoice delivered via Attaché Alex

1. In your email inbox, locate the sample invoice for Abel Sound Systems that you sent to yourself via Attaché Alex.

2. Click the **Print Document** button on the top of the email.

3. If you are using Internet Explorer 5.0, your Print dialog box is displayed. Select the appropriate options and then click **OK** to print.

   If you are not using Internet Explorer 5.0, you will see a Print Preview of the document. Choose **File | Print** to open your Print dialog box. Select the appropriate options and then click **OK** to print.

4. If you are not happy with the results of printing (for example, if the document has printed over many pages), on the email click the **Page Setup** button and follow the instructions to configure your page setup.

5. If necessary, refer to the Attaché Alex website's *Helpful Hints (Receivers)* section for further advice on printing documents received via Attaché Alex.

Save the invoice to your hard drive

1. In your email inbox, locate the sample invoice for Abel Sound Systems that you sent to yourself via Attaché Alex.

2. Right-click on the body of the email and choose **Save Picture As**.

3. In the Save Picture dialog box, navigate to the folder where you wish to save the document, type a **File Name** for the document and then click **Save**. The document is saved as a .GIF image.

4. If you want to open the document later, locate the file in Windows Explorer and double-click to open it. The document opens in the program your computer uses to open .GIF images.

5. To print the saved document choose **File | Print** (or the appropriate print command).
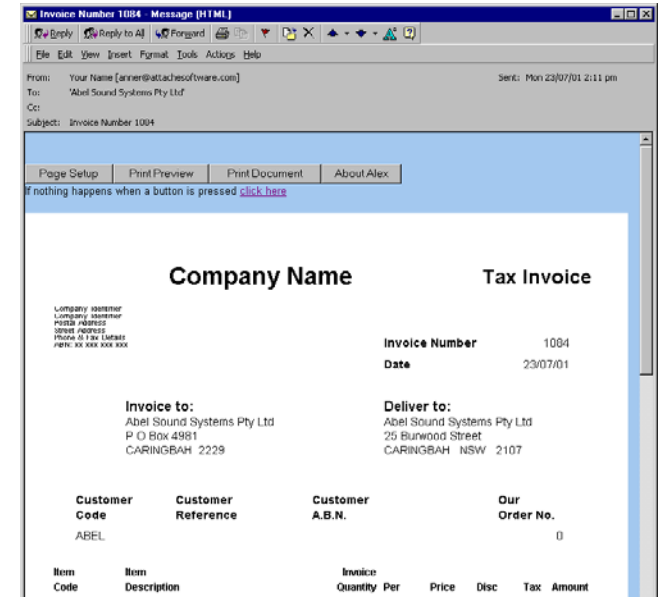
Congratulations!

You have now successfully completed the Attaché Alex Guided Tour using Sample Data.

What you have achieved

During the Guided Tour you:

- Obtained and installed the AlexConnect software

- Set up your system to send a sample Customer document (invoice) and a sample Supplier document (purchase order)

- Sent the documents to yourself via Attaché Alex, and later printed and saved the invoice

- Received the Attaché Alex welcome email, which included your password for signing in at the Attaché Alex website

- Signed in at the Attaché Alex website and then displayed a list of documents you sent via Attaché Alex.

Now you're ready to transfer what you have learnt to your live data. In your live company, set up your **sender details (for customers and for suppliers)** and then set up the **receiver details of your customers and suppliers.**

Further information

- If you haven't already done so, Attaché Software strongly recommends that you download and read the ***AlexConnect Installation and User Guide,*** which contains detailed information about all aspects of using Attaché Alex.

- The Attaché Alex website (www.attacheonline.com/alex) also contains information to assist you in using the Attaché Alex service, including special information about printing documents received via Attaché Alex.

- Your Attaché consultant can provide invaluable assistance in using Attaché Alex.