

Attaché Alex

Guided Tour

Using Attaché Alex with Attaché PRO

This guided tour shows you how to:

- Obtain the AlexConnect software
- Install AlexConnect
- Configure AlexQ (the AlexConnect Queue Manager)
- Start AlexQ
- Setup sender details for Customer documents
- Setup Recipient details
- Send a sample invoice via Attaché Alex
- Register with Attaché Alex
- Visit the Attaché Alex website

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About Attaché Alex

The Attaché Alex electronic document delivery service allows you to email or fax business documents created in Attaché PRO directly to receivers – your customers and suppliers. Attaché Alex can confirm the delivery of each document and perform other reporting tasks on the status of documents sent through the service.

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

NOTE:

If you are using your live accounts for this test, we suggest any Email addresses / fax numbers that you set up be your own email address and fax number, so that documents will be returned to you. We also recommend that you reprint existing documents rather than creating transactions to live customers / suppliers that would need to be deleted.

Before you begin

To successfully use Attaché Alex, you need:

- an Internet connection to send, receive and view documents sent via Attaché Alex.
- 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).
- the ALEX module on your Attaché PRO licence (if running Attaché PRO 3.1.0.0 or higher)
- Attaché PRO version 3.0.2.2 or higher

The latest version of Attaché PRO can be downloaded from the Software Updates section of the CBP Members website (<http://cbp.attachesoftware.co.nz/>). The website provides instructions for downloading and installing the software. Alternatively, you can obtain the latest version on CD-ROM from Attaché Software.

If you are not sure which version you currently have, start Attaché PRO and choose **Help | About Attaché PRO**. The version number is displayed together with other system information.

If you are on a version of Attaché PRO lower than 3.0.2.2 please contact your Attaché Consultant.

Obtain AlexConnect

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

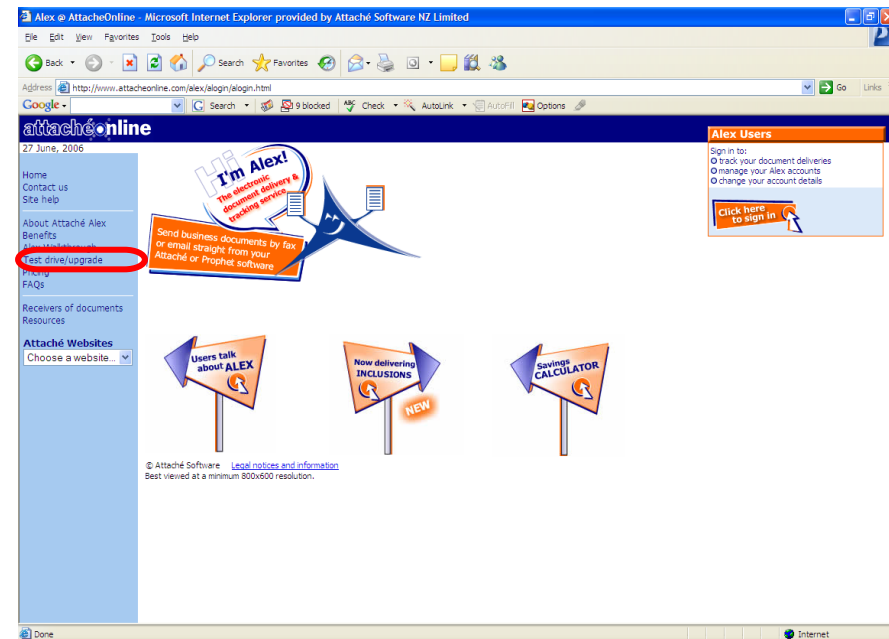
Alternatively, you can obtain the software from the Attaché Pro CD-ROM (in which case, proceed to *Install AlexConnect* on page 3).

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/Upgrade** link.
3. Click the **AlexConnect for Attaché PRO (NZ)** image.
4. Click the **Download Alex** image.
5. If asked, choose to save the file to disk/hard drive.
6. Click **Save** to save the file to your download folder (for example, C:\Download).

Extract 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 extract the files. Accept the default by clicking **Unzip**. The files extract into a subfolder off the download folder.



Install AlexConnect

You can download the AlexConnect software from the Attaché Alex website (at www.attacheonline.com/alex). The site includes information on how to download and then extract the downloaded files.

Install AlexConnect

To install AlexConnect from an Internet download that you have extracted:


1. Ensure that no one is using Attaché PRO.
2. In Windows Explorer, locate the folder in which you extracted the AlexConnect download.
3. To start the AlexConnect installation, double-click SETUP.EXE.
4. Choose **Next** until the program asks you to nominate the Installation Directory.
5. The installation directory defaults to **C:\ALEXCONNECT**. You can choose **OK** to accept the default or you can install the software in a different directory. (If you are running Attaché PRO on a network, we recommend installing AlexConnect in a network location available to all Attaché PRO workstations.)
6. To continue the installation, choose **Next**.
7. When the installation is complete, choose **OK**.

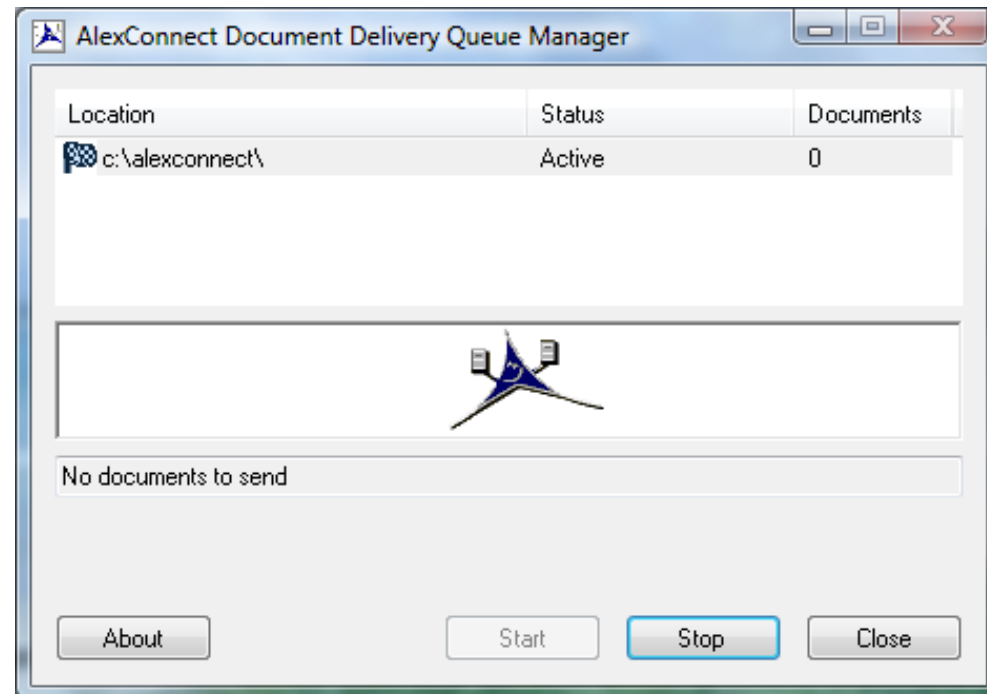
Start AlexQ

AlexQ, the AlexConnect Queue Manager, is the part of AlexConnect that sends documents over your Internet connection.

Start AlexQ

To create an AlexQ shortcut and start AlexQ:

1. Using Windows Explorer or My Computer, browse to the folder in which you installed AlexConnect.
2. To start the AlexQ Desktop Shortcut Wizard, double-click on ALEXQ.EXE.
3. To proceed with the wizard, choose **Next**.
4. Type the full name of the AlexQ folder, which should be the same as the folder where you installed AlexConnect, or use the browse button () to locate the folder.
5. Complete the rest of the wizard.
6. **To start AlexQ, double-click on the shortcut. (If you do not start AlexQ, no Alex documents are processed.)**



Activate Alex

Within Attaché PRO, details are stored to hold the Attaché Alex website name and the folder where documents will be temporarily stored for sending electronically

Attaché Alex tip

Please note that if you have both AP and AR modules in Attaché PRO, sender details must be set up in both modules before Alex capability can be activated.

Sender details

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

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

Attaché Alex tip

When using Attaché Alex with your live company data, use a generic email address (such as `accounts@company.co.nz`) 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.

Setting up Alex and sender details inside Attaché PRO

The system stores a name and email address that identifies the sender of documents.

1. Choose **System | Alex Control Centre**.
2. Enter:
 - the domain name of the Alex web site (`mailforalex.com`)
 - the Attaché Alex documents temporary folder (which is the directory you chose in **Install AlexConnect** to and must be the same as your AlexQ location).
3. In each *Display name* field, type the name you want to appear on each document you send.
4. In each *Email address* field, type your email address.
5. Check *Activate Alex*.
6. Click **OK**.

Alex Control Centre [ABC Holdings Limited - 3.0.1.3]

Settings | Inclusions | Default Inclusions | Utils

Alex settings

Activate Alex

Domain name:

Document folder:

Inclusions network share:

AP Sender Details

Display name:

Email address:

AR Sender Details

Display name:

Email address:

General Sender Details

Display name:

Email address:

Setting up receiver details (document delivery addresses)

AlexConnect needs to know the delivery details of where you want to deliver documents and the document types that you want to send. Use Attaché PRO customer and creditor maintenance functions to set up email and/or fax details for each of your customers and creditors.

AlexConnect needs to know which documents you want to send, and where and how you want to send them. This information is recorded as *document delivery addresses* under the documents tab for customers and creditors.

Setting up Recipient details inside Attaché PRO

To set up the delivery details for a receiver (customer or creditor):

1. Choose Accounts Receivable | Customer | Document or Accounts Payable | Creditor | Document.
2. Use the **Add** button (**F4**) to add a document delivery address.
3. Enter the required information:
 - Select the *Type of document* this address relates to from the list of options.
 - Choose the Delivery *Method*.
 - *Requires printed* means the customer/creditor specifically requests a hard (printed) copy in addition to the emailed/faxed copy. (Note: we recommend that you do not tick this field as you will be paying twice to send your documents – via Alex and via mail.)
 - *Notification*. As the normal way of monitoring sent/received mail is via the Alex Website, this should only need to be used if you need notification that the specific receiver has opened the specific document. If you prefer to manage documents using the Attaché Alex website, leave the *Delivery notification required* unchecked.
 - The *Recipient name* is always needed. Please note that you cannot use the & character.
 - Fax numbers must be specified as international numbers, but without the +. For example, +6493029391 or 09 302 9391 should be entered as 6493029391.
 - Documents addressed to incorrect or incomplete email or fax addresses will be listed as undeliverable by Alex.
4. Press Save or F9.

Attaché Alex tip

If you have the Data Transfer module contact Attaché Software for instruction on how to import in Customer and Supplier Delivery Addresses

The screenshot shows the 'Accounts Receivable Customers' window for 'ABC Holdings Limited - 3.0.1.3'. The 'Delivery Address' tab is active, showing details for 'Mr. J. Aaron'. The form contains the following fields and values:

- Code: AARDNJ
- Name: Mr. J. Aaron
- Reference: (empty)
- Document type: Statement
- Delivery method: Fax
- Requires Printed:
- Delivery notification:
- Recipient name: James Aaron
- Email address: (empty)
- Fax number: 6493029391

Sending Customer documents

Print a copy of an invoice and select to email it to yourself.

Because we can override permanent customer destinations, we have skipped the step of setting up destinations for individual customers. (Complete information is available in the AlexConnect for Attaché PRO User Guide.)

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

Send a sample invoice via Attaché Alex

Single Transaction print

1. View a historic invoice in the normal way for the customer and click **Print**.
2. Select the *Report Style* as Attaché PRO and check the option to Send copy via Alex.
3. If you do not want a printed copy, but you wish to send via Alex, you can either choose Alex as the destination or select Window to view the invoice on screen.
4. Set the Alex Options:
 - Choose delivery by Email or Fax.
 - Check the delivery notification option so that you receive an email when the recipient opens the document (or when, if you chose to fax the document, the fax arrives).
 - Type the Alex recipient (your name).
 - Type the destination address (your email address or fax number).
 - Click **Print**

Attaché Alex tip

Documents delivered via Attaché Alex have four possible outputs: local printing, email (on screen), remote printing and fax. How will your documents appear to the receiver? Are your reports suitable for all formats?

You might like to test all of your reports by emailing or faxing them to yourself. If you require any changes please contact an Attaché PRO Report Designer.

Report options - Reprint Invoice

- Report style

Attaché PRO Text

- Destination

Window Printer Alex Export Send copy via Alex

- Alex options

Delivery Method: Delivery notification required

To Name: Address:

From Name: Address:

Password (Optional): Inclusions:

Buttons:

Register with Attaché Alex

When you send your first document via Attaché Alex, you will receive an email from Alex asking you to complete a simple registration procedure. After you complete the procedure, you will receive a **Welcome email**.

The Welcome email tells you how to sign in at the Alex Users website.

Attaché Alex tip

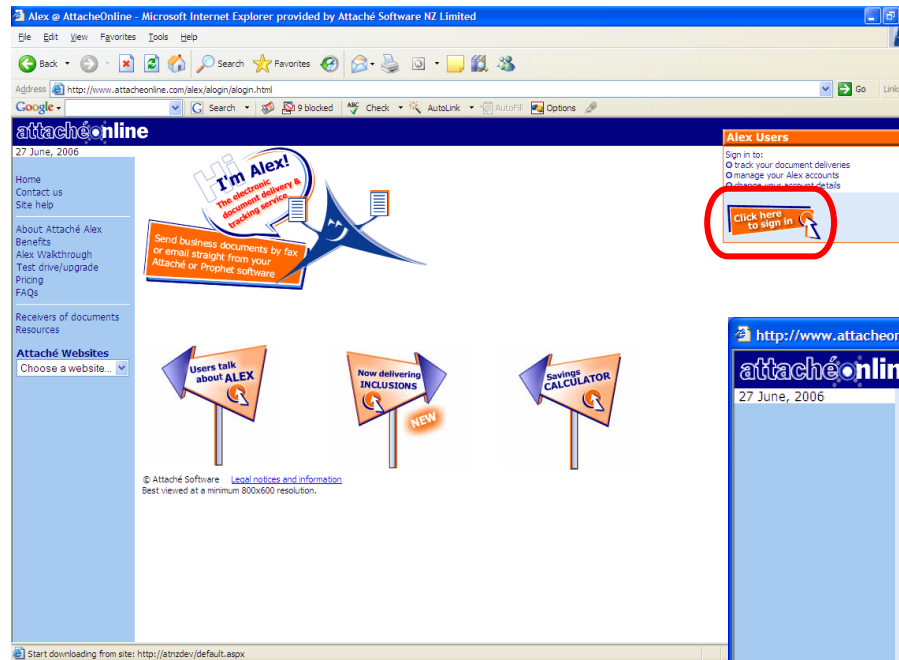
The appearance of the website may be different to what you see here. This is because different browsers interpret web pages differently.

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

Sign in at the Alex Users website

1. Start your web browser.
2. In the Address box, type **http://www.attacheonline.com/alex** and press **Enter**.
3. Select **Click Here to Sign In**
4. In the appropriate fields, type your email address and your password to sign in to the Alex Users website.
5. Click **Sign in**.



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.

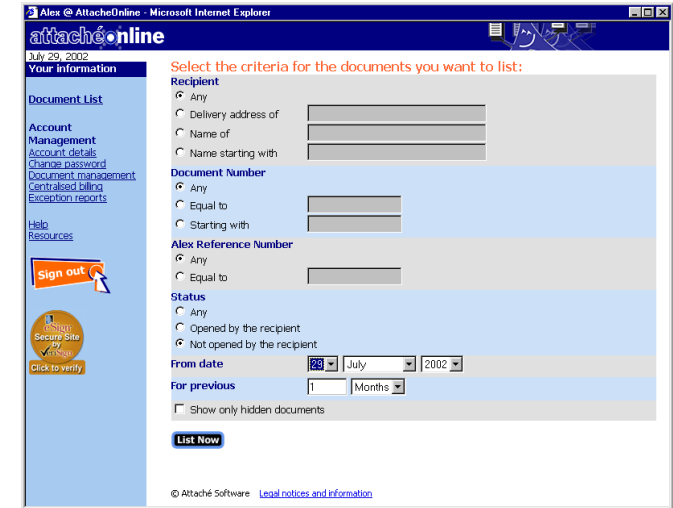
Use the Document List form

After signing in to the secure Alex Users website, you can use the Document List form to display a list of documents that you have sent.

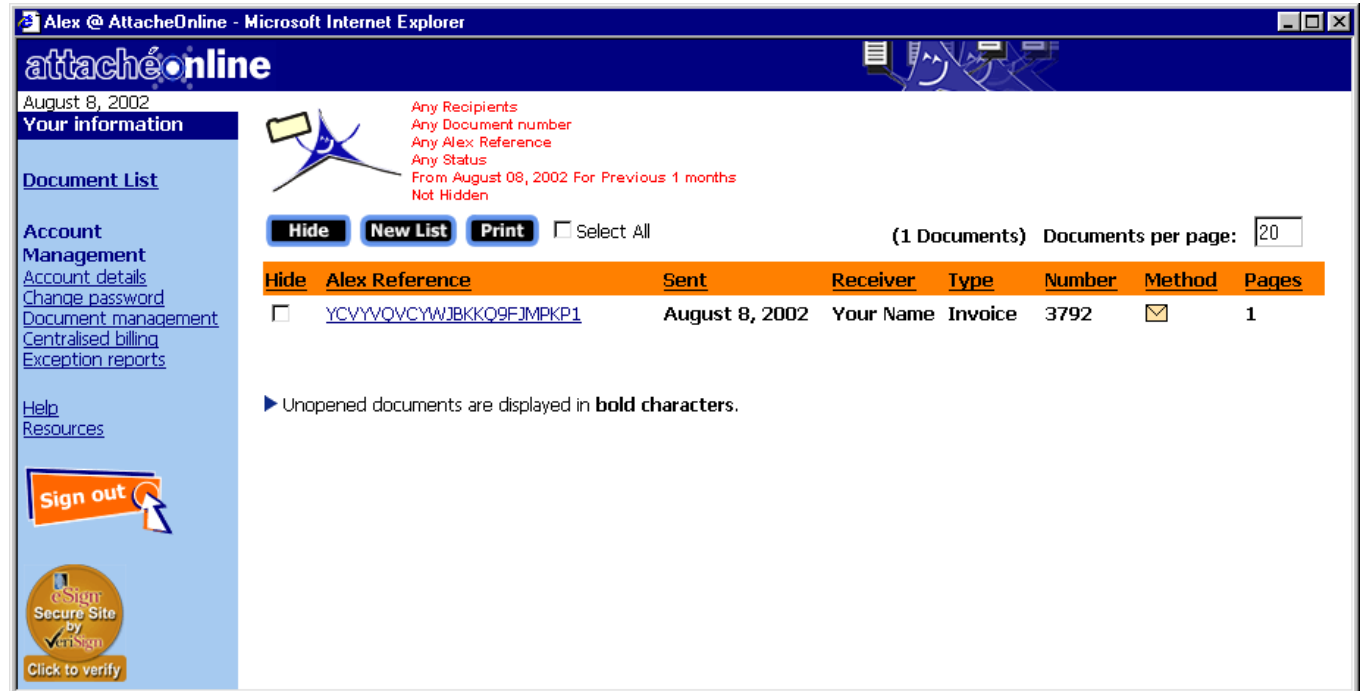
Here we will display a list of the documents you have sent via Attaché Alex:

1. If necessary, click **Document List** to display the Document List form.
2. On the Document List form, select **Any** for each of the four categories.
3. Click the **List Now** button to see the results.

The list shows the sample document that you 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, change your account details, find help and resources, and perform other Alex-related tasks.

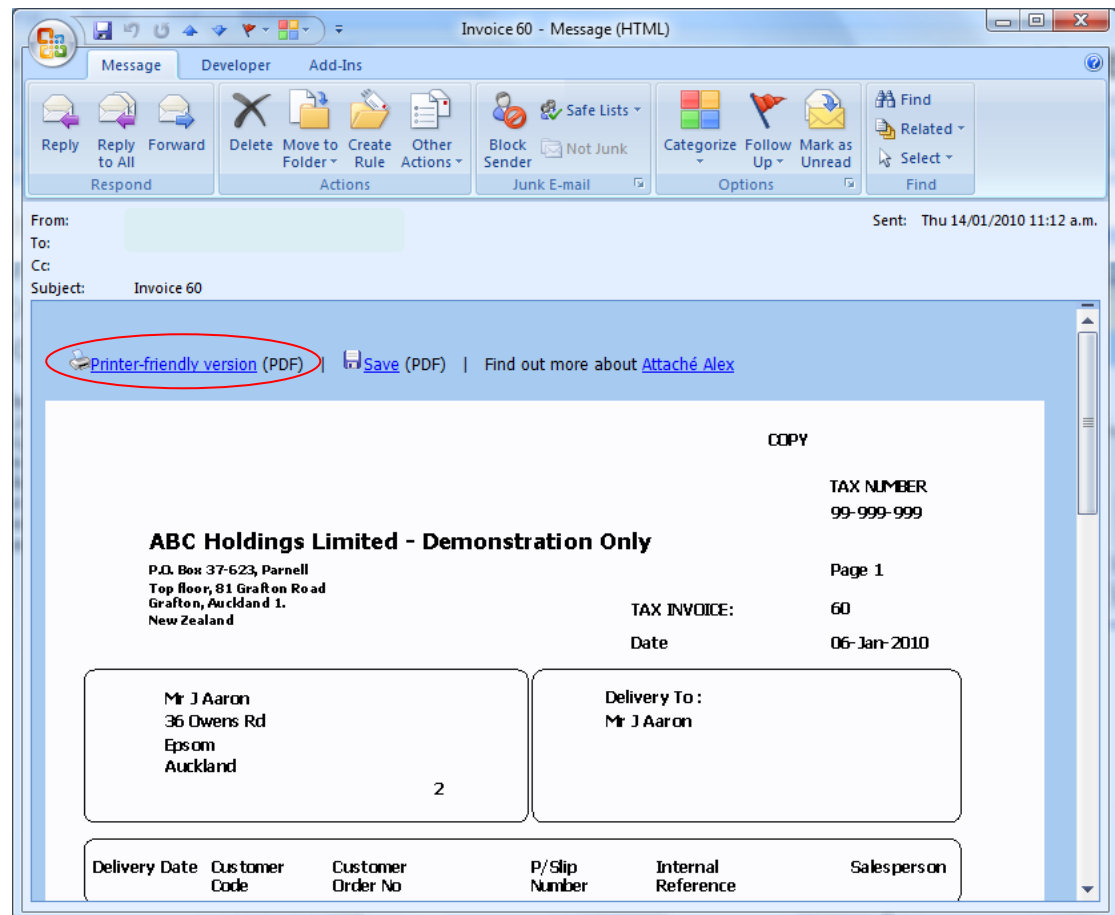


Printing received documents

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 that you sent to yourself via Attaché Alex.
2. Click the **Printer Friendly Version** hyperlink button on the top of the email.
3. If necessary, refer to the Attaché Alex website's Receivers page for further advice on printing documents received via Attaché Alex.



Congratulations!

You have now successfully completed the Attaché Alex Guided Tour.

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).
- Sent the document to yourself via Attaché Alex and later printed
- Completed the registration procedure and received the Attaché Alex welcome email
- Signed in at the Attaché Alex website and then displayed a list of documents you sent via Attaché Alex.

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 Accredited Installer can provide invaluable assistance in using Attaché Alex.