

Working Offline



In order to setup the Key Offline you need to be connected to the Internet. This will undertake a synchronisation of the client database between the Key servers and the local computer. Once complete you will then be prompted to synchronise each time you close the Key.

If you have never used The Key Offline you will need to complete the following:

Creating an Offline Database for the First Time

Make sure you are connected to the Internet and then run The Key and under Database select **Work Offline**.

Welcome (Site Reference KT0004)

sesame®

the key

User name Test Adviser

Password xxxxxxxx

Database Work Offline

Login Proxy ON

Select **Login** and the synchronisation process will commence.

The Key

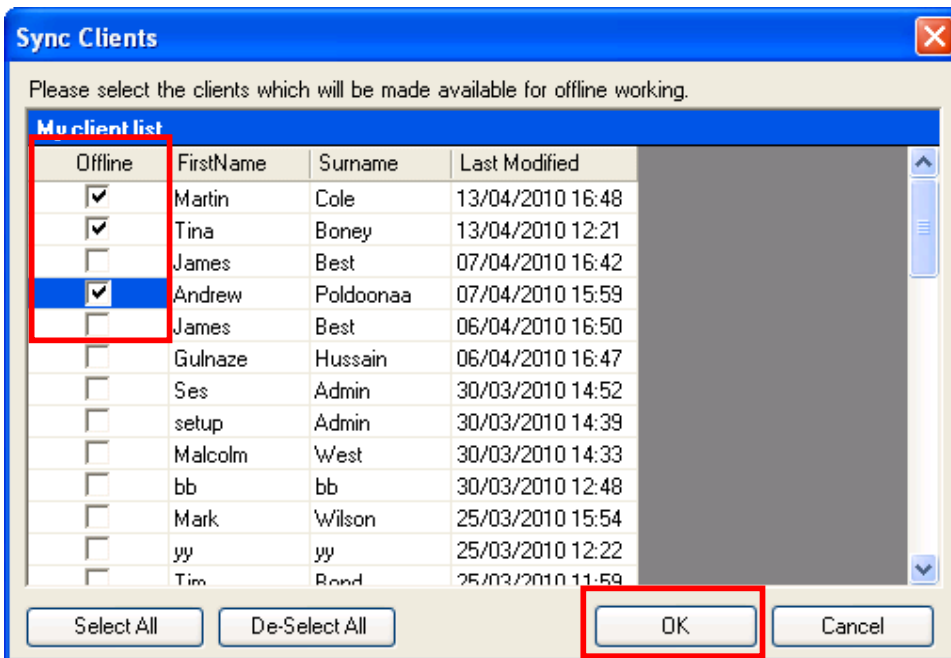
An online sync must be performed in order to setup the offline data store for first use. Do you wish to start the sync now?

OK Cancel

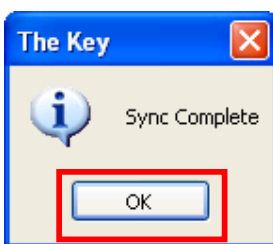
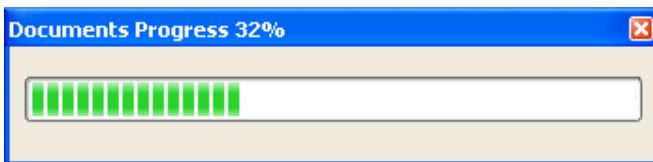
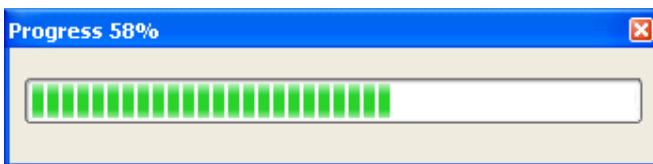
Click **OK**.

This will display a **Sync Clients** list where you can select the clients you would like to make available for offline working by ticking in the offline column.

Please note: Clients that have not been selected will still be displayed off-line but will be in **Read Only** mode.



Select **OK**. A progress bar will advise how far the synchronisation has progressed.

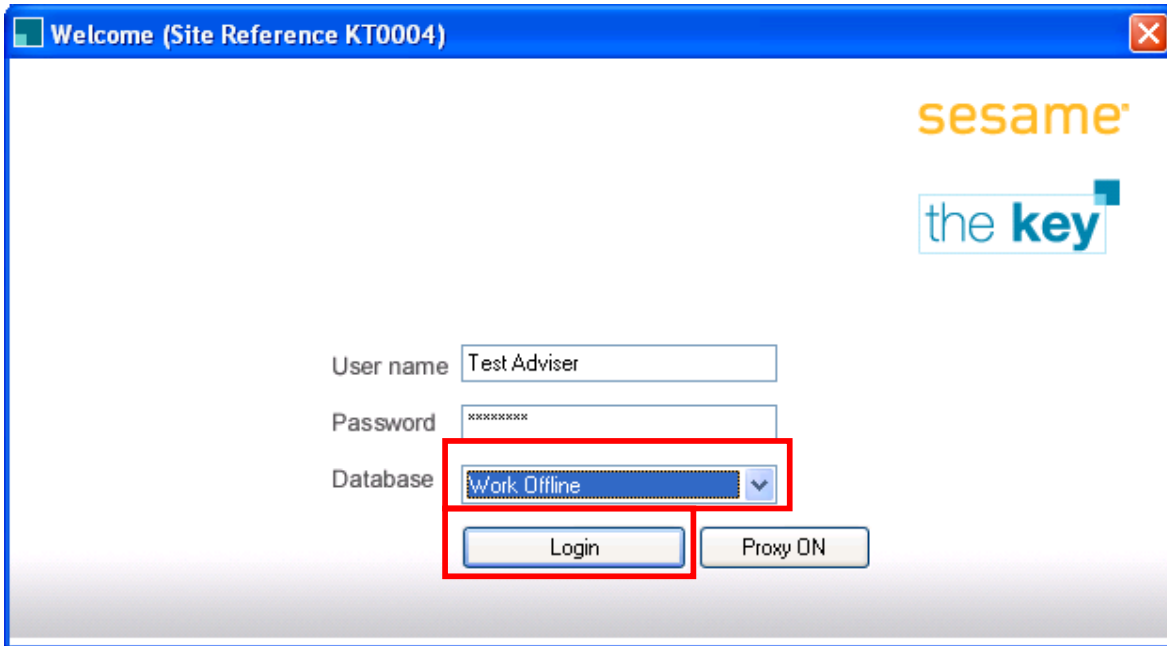


Click **OK**.

Once the synchronisation has been successfully completed you will automatically be logged into the offline database.

Working with Clients Offline

Log in to the Offline database as shown below



Welcome (Site Reference KT0004)

sesame
the key

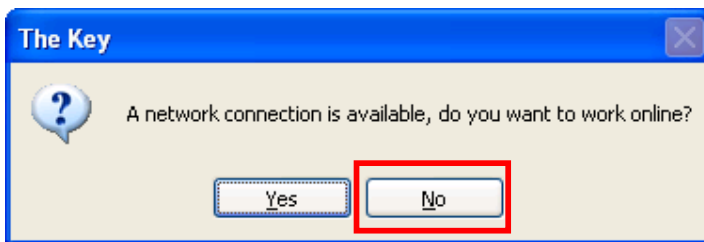
User name Test Adviser

Password xxxxxxxx

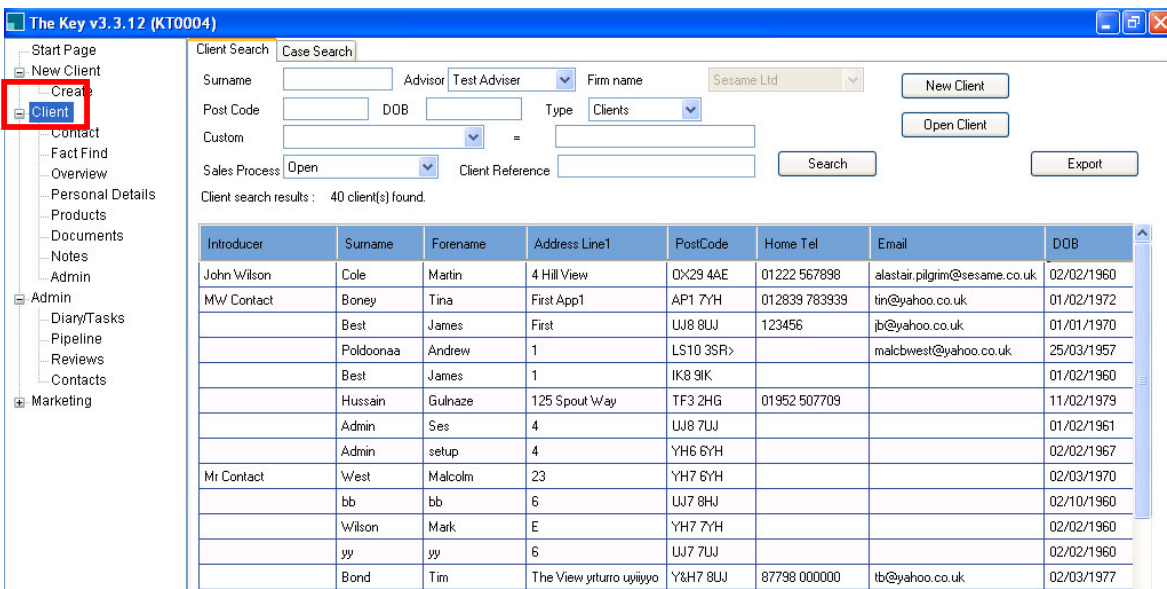
Database Work Offline

Login Proxy ON

When the following message appears press **No** which will ensure that you remain working offline.



By clicking on the **Client** folder, this will then display a list of clients that have been transferred onto the off-line database.



The Key v3.3.12 (KT0004)

Client Search Case Search

Surname [] Advisor Test Adviser Firm name Sesame Ltd New Client

Post Code [] DOB [] Type Clients Open Client

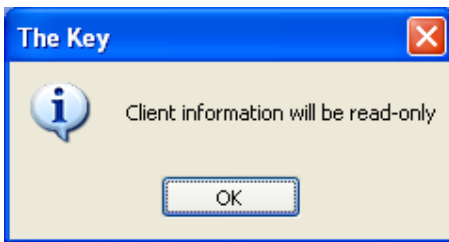
Custom [] = [] Search Export

Sales Process Open Client Reference []

Client search results : 40 client(s) found.

Introducer	Surname	Forename	Address Line1	PostCode	Home Tel	Email	DOB
John Wilson	Cole	Martin	4 Hill View	OX29 4AE	01222 567898	alastair.pilgrim@sesame.co.uk	02/02/1960
MW Contact	Boney	Tina	First App1	AP1 7YH	012839 783939	tin@yahoo.co.uk	01/02/1972
	Best	James	First	UJ8 8UJ	123456	jb@yahoo.co.uk	01/01/1970
	Poldoonaa	Andrew	1	LS10 3SP		malcbwest@yahoo.co.uk	25/03/1957
	Best	James	1	IK8 9IK			01/02/1960
	Hussain	Gulnaze	125 Spout Way	TF3 2HG	01952 507709		11/02/1979
	Admin	Ses	4	UJ8 7UJ			01/02/1961
	Admin	setup	4	YH6 6YH			02/02/1967
Mr Contact	West	Malcolm	23	YH7 6YH			02/03/1970
	bb	bb	6	UJ7 8HJ			02/10/1960
	Wilson	Mark	E	YH7 7YH			02/02/1960
	yy	yy	6	UJ7 7UJ			02/02/1960
	Bond	Tim	The View ytturo uyiiyyo	Y&H7 8UJ	87798 000000	tb@yahoo.co.uk	02/03/1977

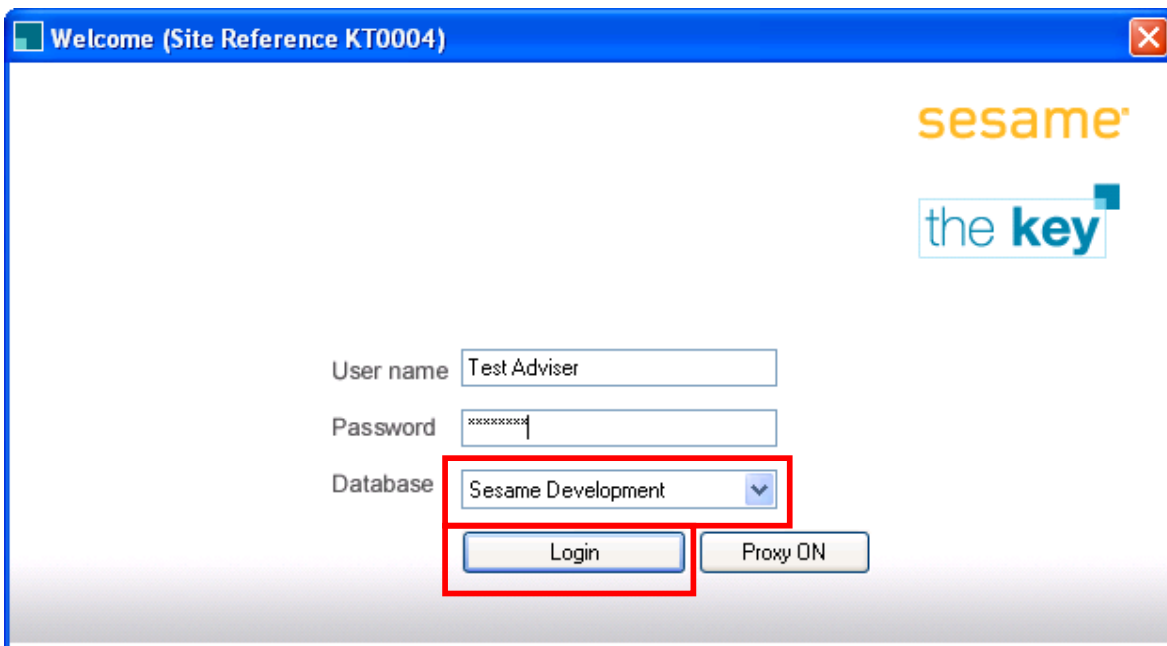
Any clients selected in the **Sync Clients** list will now be available to work on off-line. If a client is viewed which has not been selected for off-line working the following message will appear.



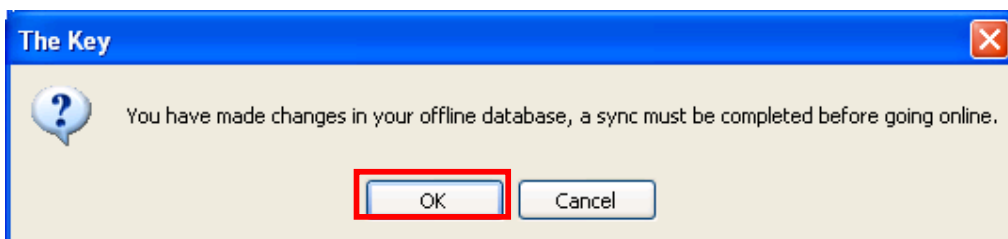
When finished log out of the Offline database.

Uploading changes from the Offline Database to the Online Database

Login to the online database.

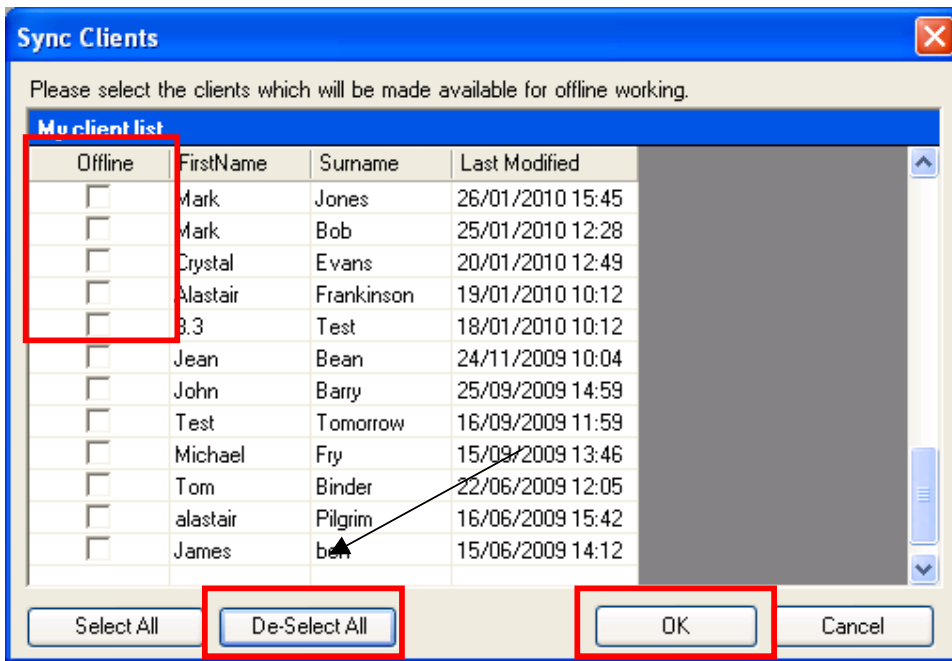


When you select to work online the system will recognise if changes have been made to the offline database and will automatically perform a synchronisation. Click on **OK**



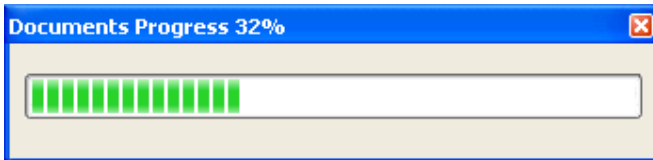
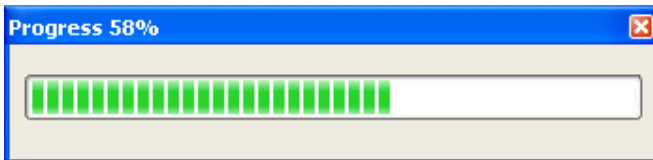
The **Sync Clients** box will be displayed detailing the clients that are currently set for off-line working.

NB You must deselect any clients which you wish to work on online by removing the tick from the **Offline** column or use the **De-Select All** option to upload the changes successfully. This will ensure the clients are editable when working on-line.

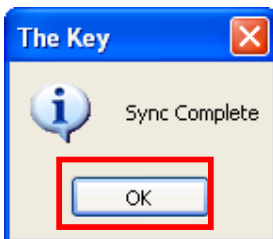


Click **OK** to continue.

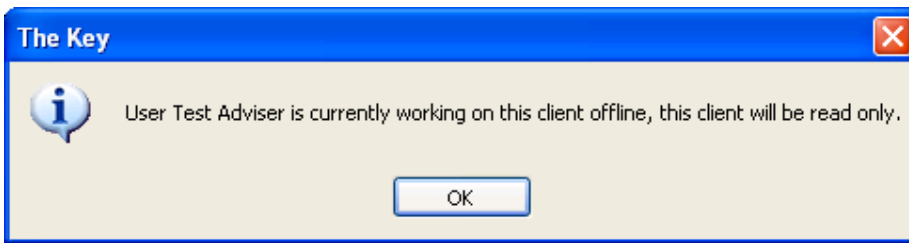
A progress bar will again be displayed.



The following message will be displayed when the synchronisation is complete and the Key will open in on-line mode.

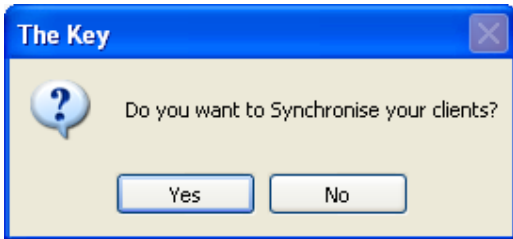


Select **OK**. In the event that any client records have been left ticked in the **Sync Clients** list and these records are accessed on-line, the following message will be displayed.



In order to unlock these clients the synchronisation process will need to be repeated and the client record unticked in the **Sync Clients List**.

When logging out of the on-line database in future cases the following message will appear.



Select **Yes** if you need to work on 1 or more clients off-line, select **No** if you will be working on-line in your next session.