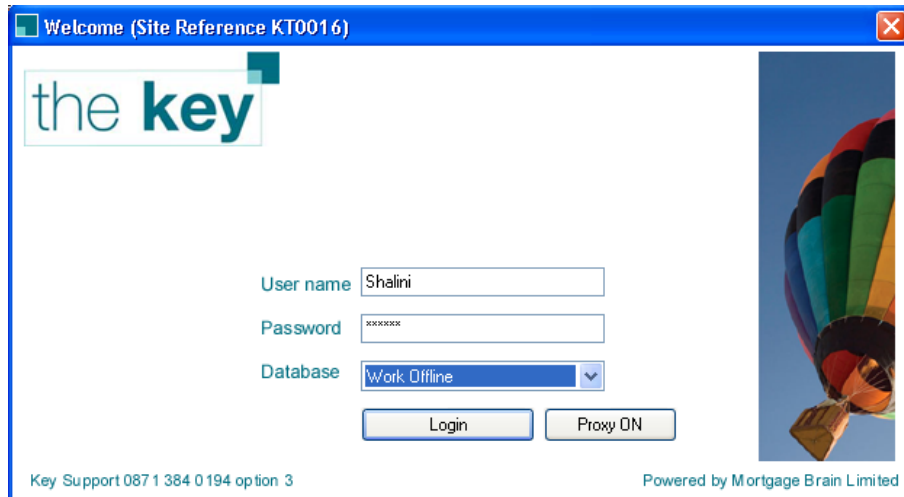


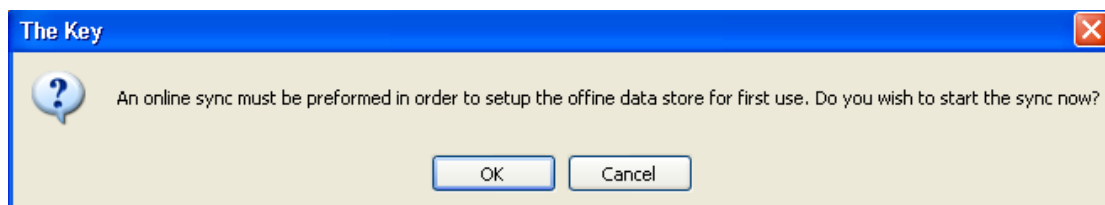
Offline User Guide

Setting up the Offline Database

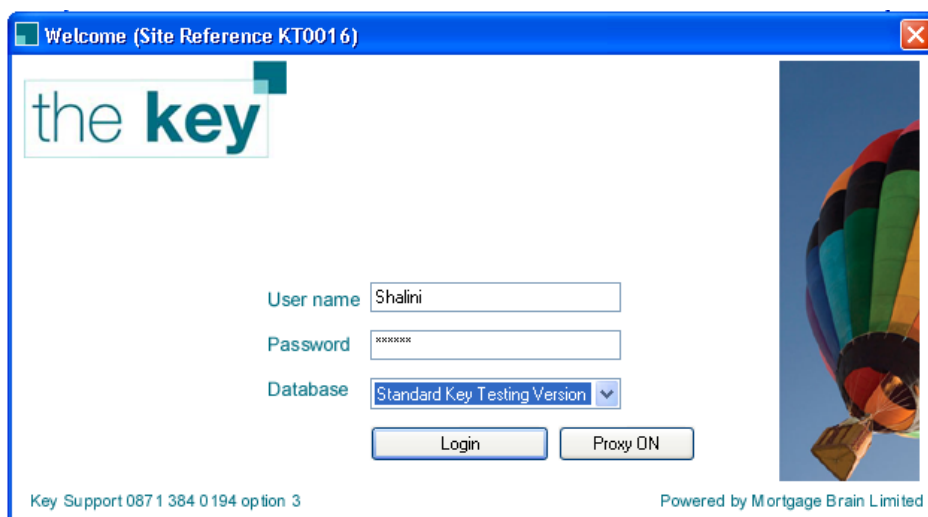
1. Login to the offline database to perform the first synchronisation.



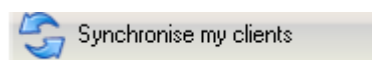
2. Select the **OK** button below to set up the offline database. Allow this to run through.



3. Once the first synchronisation has been successfully completed, login to the online database.

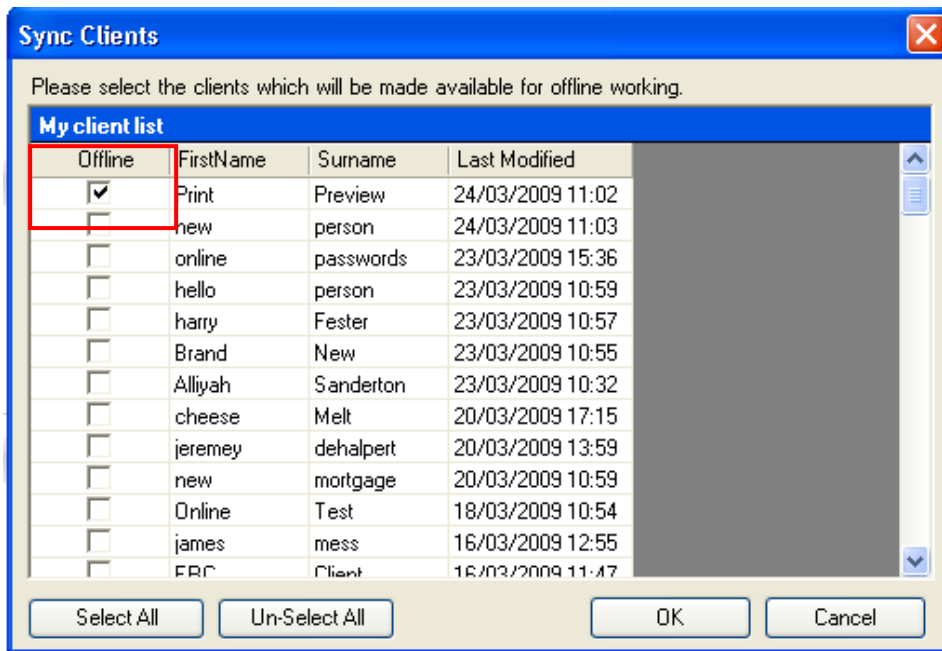


4. The Synchronise my clients function is now available from the Start Page.

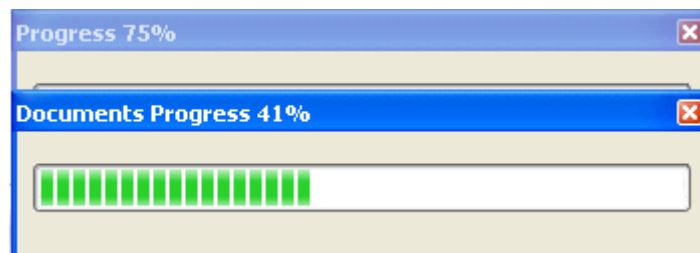


Selecting Clients to Work Offline

1. Select the 'Synchronise my clients' button
2. The below is displayed:

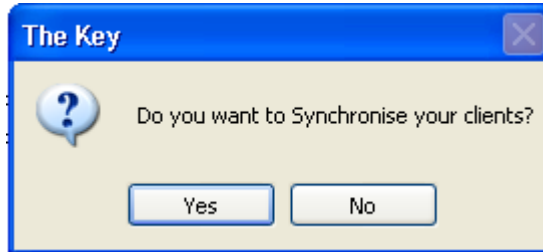


3. Select the clients you would like to make available for offline working by ticking in the offline column. Then select **OK**. **Please note:** Clients that have not been selected will be displayed in read only mode on the offline system.
4. The system will now display the progress bars. **Please note:** It may take a while for the download to complete - this depends on the number of clients and documents.



5. Log out of the online Key.

Please note: There is no need to perform another synchronisation as you exit the Online system. This can be ignored by selecting '**No**' to the below message.

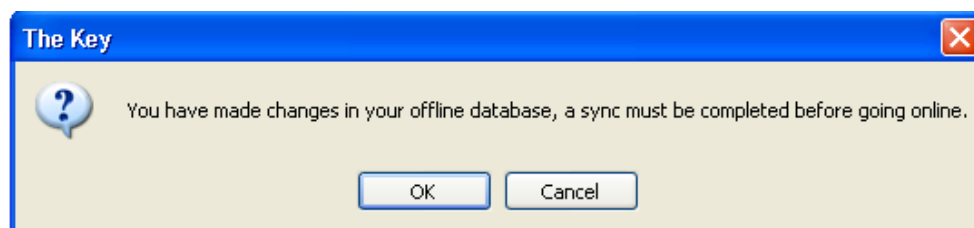


6. It is now possible to log into the Offline database and work on the clients selected for 'working offline'.



Uploading changes from the Offline Database to the Online Database

1. Log out of the Offline Database
2. Login to the Online database
3. The message below is displayed as amendments have been made to the offline database.

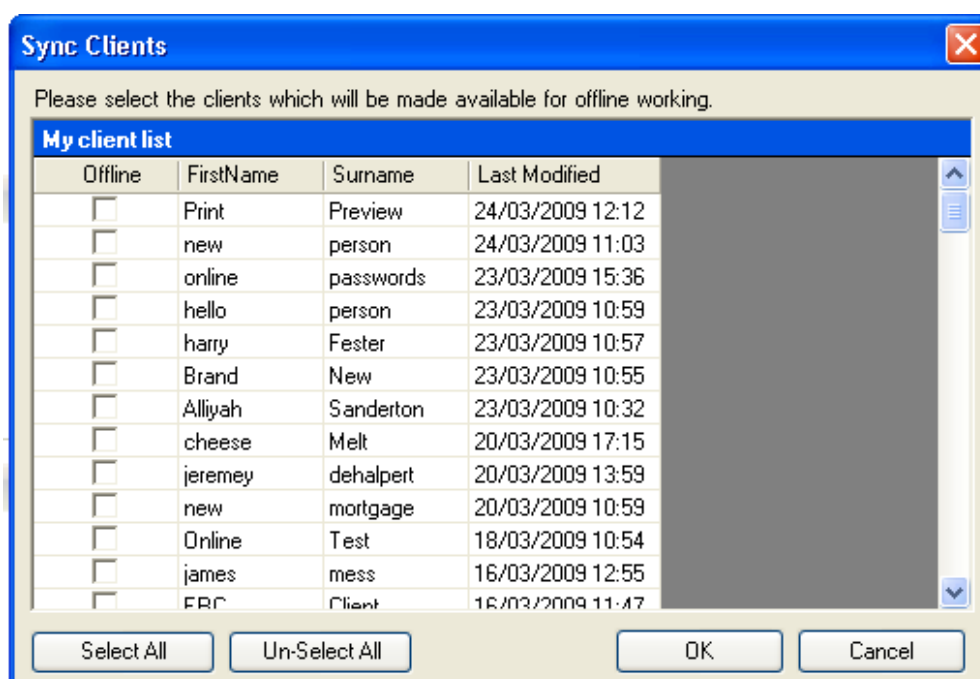


4. Select **OK** to upload these changes to the online system
5. The 'sync clients' message is displayed once again.

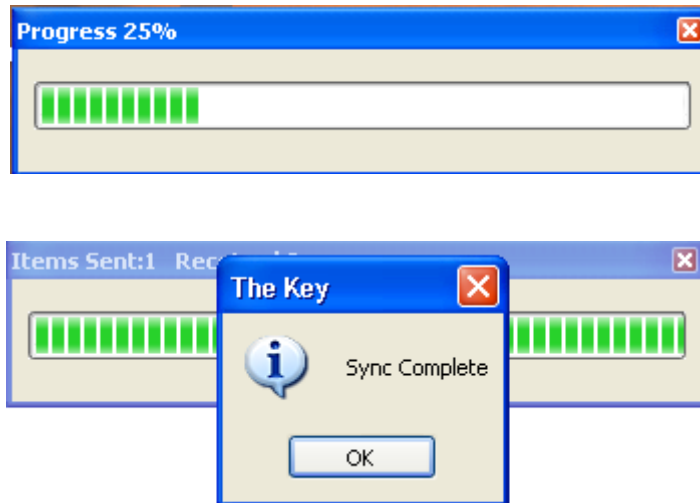
Important Note:

The message below reads **Please select the clients which will be made available for offline working?**. Ignore this and perform the below steps:

De-select your clients by removing the tick from the '**offline**' column or use the **Un-Select All** option and then select the **OK** button to upload the changes successfully. This will also ensure clients are editable when returning to the online system.



- The progress bar will be displayed and all changes from the offline will be uploaded.



- The system will automatically load the online system when the **OK** button is selected and the user is now able to view the client amendments.