

How to use the Connect Documents Synchronizer tool ?

Goal

The goal of this tool is

- to clean the 'sent to accountant' folder on Connect (due to incorrect synchronisation between WinBooks Classic/VI and Connect)
- to synchronise the 'archive' documents between WinBooks Classic/VI and Connect
- to upload the booked documents of the previous fiscal years (no more limitation of the 2 active fiscal years)

Features

- This tool will first move all Invoices and documents stored in 'Sent to accountant' + 'Blue folders' in the 'garbage'.
- Then it will synchronise all accounting files (using the File System) stored in c:/winbooks/data/company/documents/...
 - If the files already exists on WinBooks Connect but was moved in "Garbage", the tool will move it again in the right folder.
 - If the file does not exist on WinBooks Connect, it will be created with the right meta data (invoices information e.g.)
- When the synchronisation is finished, all files will be at the right place. Please check the 'garbage' folder once sync finished.

We strongly recommend you to check the WinBooks Connect folder once the tool has been ran.

Installation

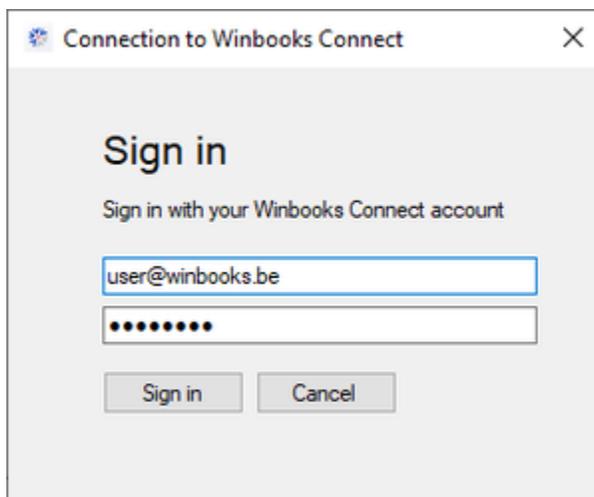
- Launch the setup and follow the steps.
- If you work with ADS, you must have files adsloc64.dll, adslocal.cfg and ADS.INI in you directory "ConnectDocumentSynchronizer".
- In the file WinBooks.Tools.Connect.ArchiveSync.exe.config, edit the line with the winbooks.ini path (replace C:\Winbooks if necessary)

```
<add key="classic:path:ini" value="C:\Winbooks" />
```

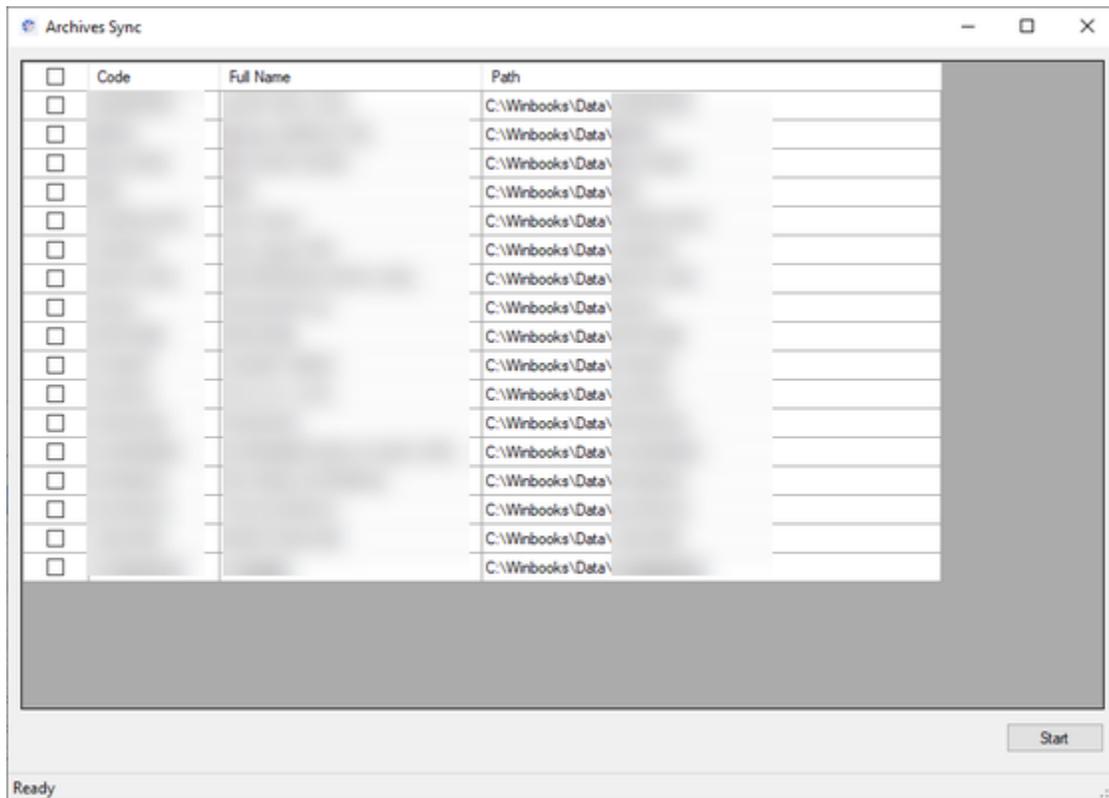
- Run the WinBooks.Tools.Connect.ArchiveSync.exe with administrator privileges

How to

- Sign in with your WinBooks Id. User should be 'Power user' or 'Licence admin' AND have the WinBooks.Connect.accountant role

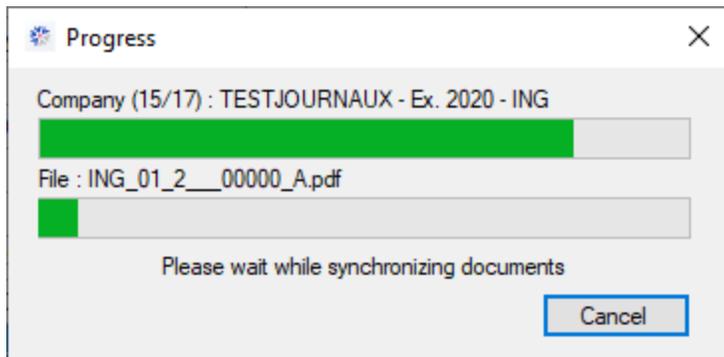


- User gets a list of folders with the
 - Code
 - Full name
 - Path
- User can select the list of folders to synchronize



This tool is able to manage multiple folders / companies at the same time. Please note that WinBooks advises you to run this tool one folder by one folder (certainly for your first 10 folders)

- Then the different steps starts one by one
 - Move to garbage
 - Compare file system and 'garbage'



- These steps are done folder by folder

Check this

We strongly recommend you to check the WinBooks Connect folder once the tool has been ran.

