Backup to an Email

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SUMMARY

This step-by-step guide describes how to backup your data and send via email.

Instructions

1. Launch Phoenix and open the set of books you are backing up.

   #Note if you have not configured your send email option in Phoenix see Trouble Shooting section at the back of the help note.

2. Select **Backup** from the **Data** menu, or if you are already in the **Financial** module select the **Backup button** on the toolbar.
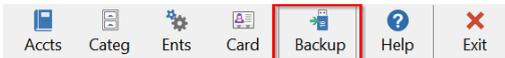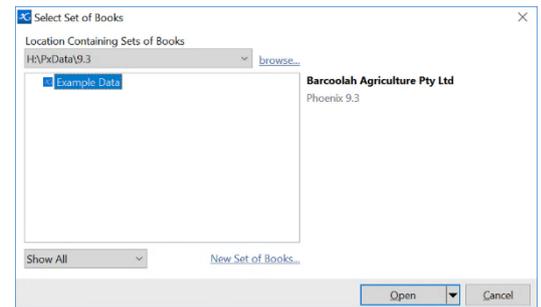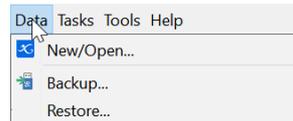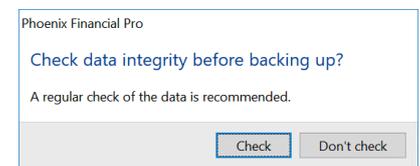
   #Note Phoenix will only backup one set of books at a time. This process will need to be repeated for each set of books that you wish to backup.

3. Phoenix must close all forms before backing up. Click **Backup** to confirm you are ready to backup this data.
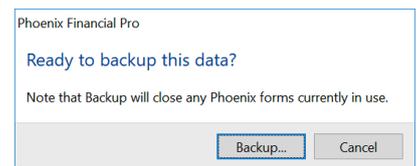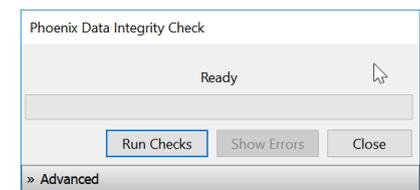
4. Confirmation windows will appear asking if you want to check the data integrity before your backup. Click **Check.**

5. Click **Run Checks.**

   #Note It is strongly recommended to check the integrity of your data. Please contact AGDATA if you receive any errors whilst checking the data integrity.

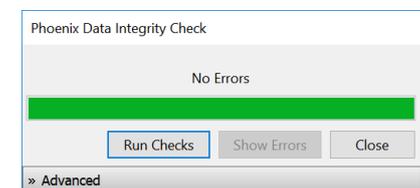6. When the data has been checked by Phoenix it will display a message "No Errors". Click **Close**

   #Note It is strongly recommended to check the integrity of your data. Please contact AGDATA if you receive any errors whilst checking the data integrity.

7.   The backup window will now open.

8.   Ensure that you have the dot on the **Email** radio button.

9.   In the **To...** field type the full email address of where the backup is to be sent.

10. **Include Map Images** should be ticked if you are using Phoenix Mapping & wish your images to be backed up as well.

#Note Including map images in every backup will make your backup size significantly larger. If you are storing your Map Images in a secure location, then it isn't necessary to include these in each backup
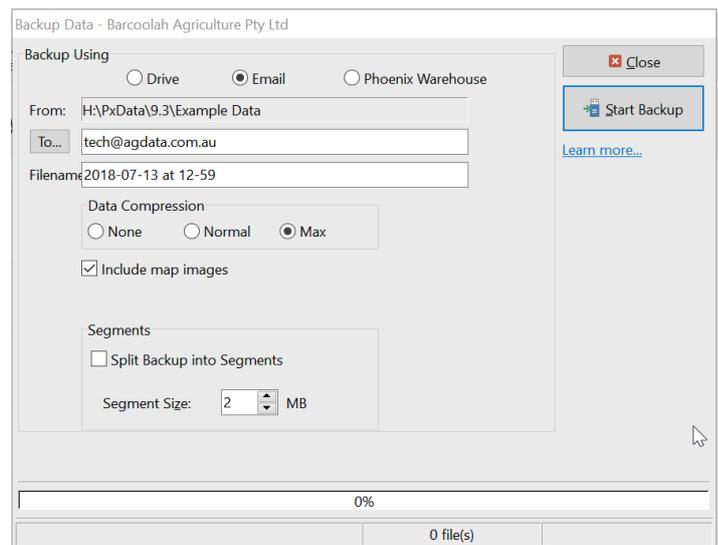
11. **Segments: Split Backup into Segments** is used when a backup is too large to have as an attachment to a single email. This is to be used specifically when backing up large Phoenix Datasets to email.

#Note If the backup is too large to email and Split Backup into Segments is selected, by default, Phoenix will split the segments into 2mb – you can change the segment size to suit. Segmented backups are sent in several segments each attached to a separate email. The first backup will be called e.g. 2018-07-13 at 12-59.PXBAK (the date and time of the backup with PXBAK being the file extension name. Then every subsequent backup segment will have an additional consecutive numerical extension on it e.g. 2018-07-13 at 12-59_001 or _002 etc. As each segment is sent attached to a separate email you need to click Send until all the emails are sent to your selected email program and the Backup Completed message appears.

12. Click **Start Backup**

13. A new email message will appear with the backup file attached. To send the email, click the **Send** button

#Note If you get a message that the email cannot be sent, you haven't setup your default email program or setup to send emails out of Phoenix, so please see the Trouble Shooting section below.

14. A message will appear stating the backup is completed. Click **Close.**

#Note this window also recommends that you test your backup to ensure it's integrity. Click "Help" for instructions.

15. Click **Close** to close the Backup Data window.
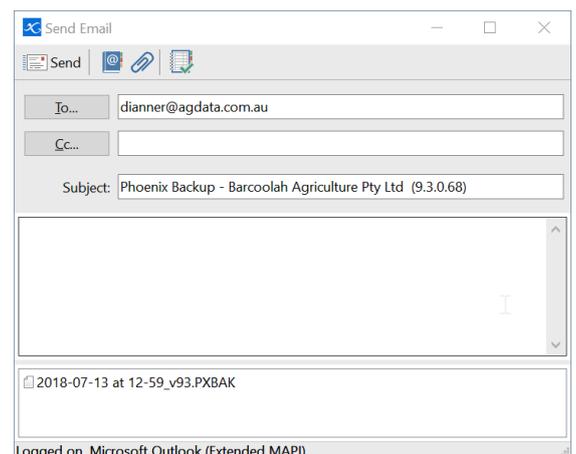
Trouble Shooting

Phoenix can be configured to use a variety of emailing options. Below are the instructions on how to set this default in Phoenix.

1. Launch Phoenix and open the set of books you wish to backup.

2. Stay in the **Phoenix Single User Suite.**

3. Click **Tools.**

4. From the dropdown menu select **Options.**

5. The Options window will appear. Select the **Send Emails** tab.

6. There are 4 options from which to choose:
   MAPI compliant program (e.g. Microsoft Outlook), Gmail, BigPond Webmail or Other email.

7. If you are using Outlook, Outlook Express, Widows Mail or any other MAPI compliant program then the first option would be the appropriate selection.

8. Click **OK** after your selection is made to confirm the change.

   #Note: Do not just click on the cross to close the window.

9. However, if you would like to directly connect to your email provider (e.g. BigPond, Gmail, Yahoo, Hotmail etc.), or you do not use an email program, you simply open a web browser and login to access your emails, you can choose the **Gmail**, **BigPond Webmail** or **Other Email** option. For these options you need your **Company Name**, **Email Address** & **Password**. The Password is for the email provider, not Phoenix. If the company details are set up in Phoenix, Your Company and Email Address may autofill for you.

10. Select **More settings...** and confirm the information there as well by clicking **OK**. In most cases the fields will have auto-filled and you may only have to enter the **Username** and/or **Password**.

    #Note if you do not know your password for your email provider you will need to contact them directly to obtain it.

11. Note the **Test Email** button in the bottom left hand corner. This will send an email to your account for you to check it is working correctly. If you receive a message indicating the email can't be sent, follow the instructions. E.g. a setting may need to be changed for Gmail to allow other programs, such as Phoenix, to connect with it.

12. Once you have chosen the appropriate option and provided the applicable information then simply click **OK.**

13. Once this default is set in Phoenix you will <u>not</u> need to do this each time the data is backed up to email. You will need to set it again though if you change computers or upgrade to a later version of Phoenix e.g. from V9 to V10. Minor upgrades within a version do not require it to be re-set e.g. V9.2 to V9.3.

14. If you experience any issues trying to backup to email which have not been covered in this help Note, please contact AGDATA Support.