eServices

eSync 3.1.5
INSTALLATION GUIDE

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Introduction

eSync is an integrated software environment that allows your practice management software to communicate with eServices and other software. This environment improves the efficiency of many daily tasks by allowing the real-time transfer of data between workstation computers, network servers, and third-party programs.

This document will guide you through installing eSync. If you have any questions or problems that are not addressed by this document, please contact eServices Customer Support at (800) 734-5561.

Prerequisites

Before you install eSync, if you are running Windows XP, you must have Service Pack 2 or newer installed. Also, when you install eSync, you will be required to enter your customer ID number. Make sure you have that number before proceeding.

eSync Installation Types

The eSync installation type depends on the type or role of the computer in the office on which you are installing eSync. The following types of eSync installations are available:

- **eSync server** – Install the eSync server on the computer that will handle all eSync communications and processing. The eSync server installation program registers your computer so that the exchange of information can take place. You must install the eSync server before any client versions; the first computer on which you install eSync will be the eSync server. In order for a computer to act as the eSync server, it must meet the following requirements:

    - The computer must maintain constant Internet access.

    - The computer must always be running.

    - The computer must be capable of handling a high networking and processing load.

    Note: The practice management server is the computer that contains your practice management software's database. The eSync server must be able to communicate with your practice management server if they are not the same computer. We recommend that you install the eSync server on your practice management server. If the eSync Install program finds your practice management software's database on the computer, it automatically initiates an installation of the eSync server.

- **eSync client** – Install the eSync client on each computer on your practice's network that has Internet access and is not the eSync server. The eSync client installation program registers the eSync client computer to your eSync server in order to exchange information.

- **eSync offline client** – Install the eSync offline client on each computer on your practice's network that does not have Internet access and is not the eSync server. The eSync offline client installation program registers the eSync offline client computer to your eSync server in order to exchange information between the server and other network computers through eSync.

Important: The **practice management server** is the computer in your office that contains your practice management database. You must install eSync on the practice management server using one of the available installation types (eSync server, eSync client, or eSync offline client). This makes it possible for the practice management server to communicate with the eSync server. During the eSync installation, you will see a check box option that says **Check this box if this computer is your Practice Management Database Server**. Select this check box *only when you are installing eSync on your practice management server*.

Installing eSync

You can install the eSync server software on any computer, but it is recommended that you install it on the practice management server (the computer that contains your practice management software's database). It is recommended that you install the eSync server before installing any client versions.

To install eSync

1. Disable your anti-virus software. Anti-virus software can cause software installations to fail.

2. Depending on your practice management software, the eSync installation may begin automatically after your practice management software is installed; otherwise, after downloading the eSync installation file, go to the location where you saved the eSync Setup program, and then double-click the Setup icon.


eSync_Setup.
exe

The eSync Install program begins and checks for Internet connectivity.
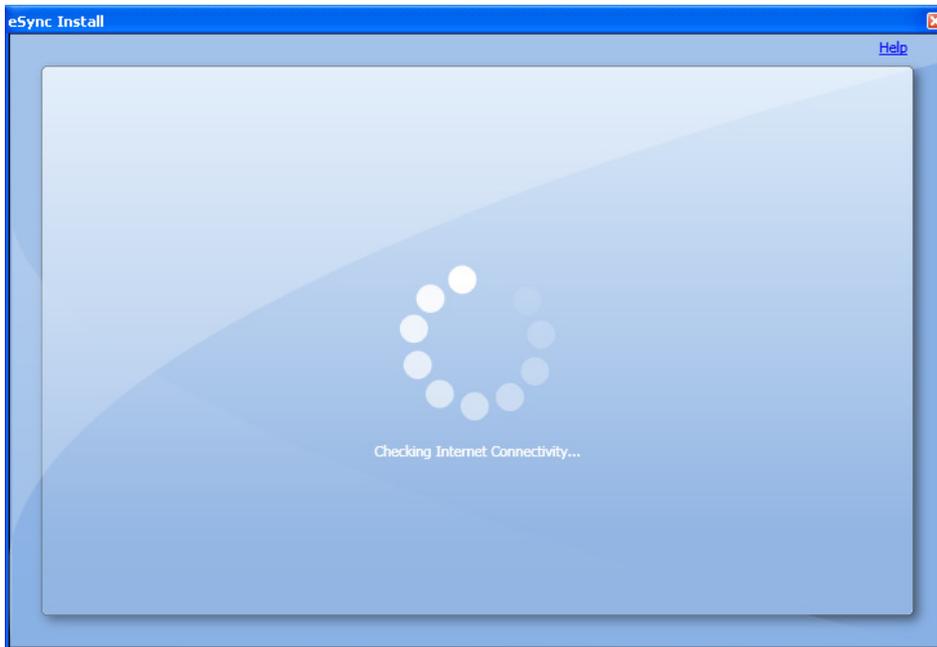
If an Internet connection cannot be established, you will either need to resolve the Internet connectivity problem and rerun the eSync Setup program or install the eSync offline client. For instructions on how to install eSync while offline, see "Installing the eSync Offline Client" on page 10.

OR

If an Internet connection is established, the Select Practice Management System window appears.
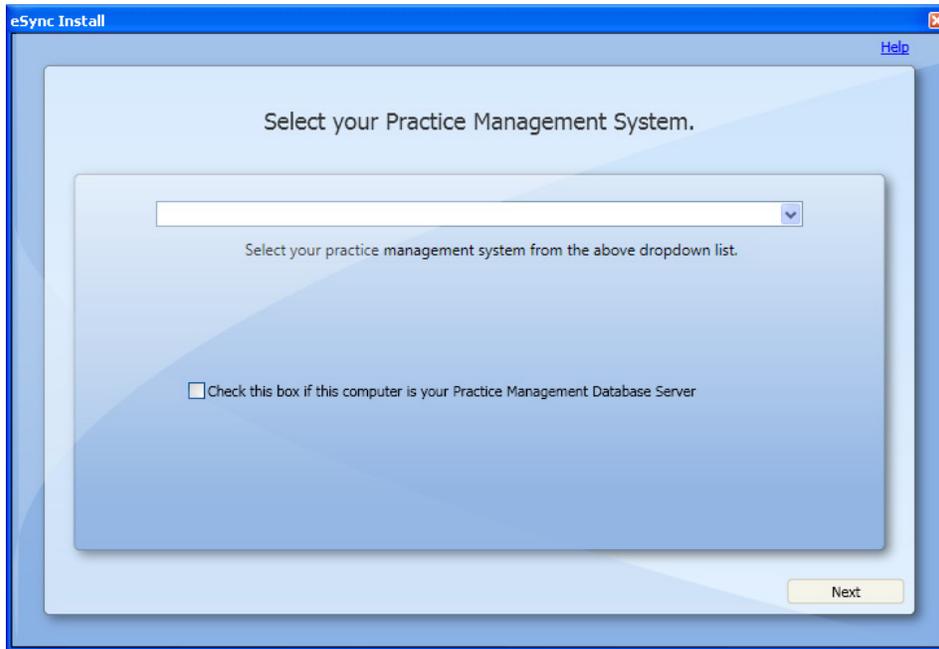
3. From the list, select the practice management program you use.

4. If you are installing eSync on the computer that functions as a server for your practice management software's database, select **Check this box if this computer is your Practice Management Database Server**.

5. Click **Next**. (This button is available only if you selected a practice management program.)

The Enter your practice's customer number window appears.
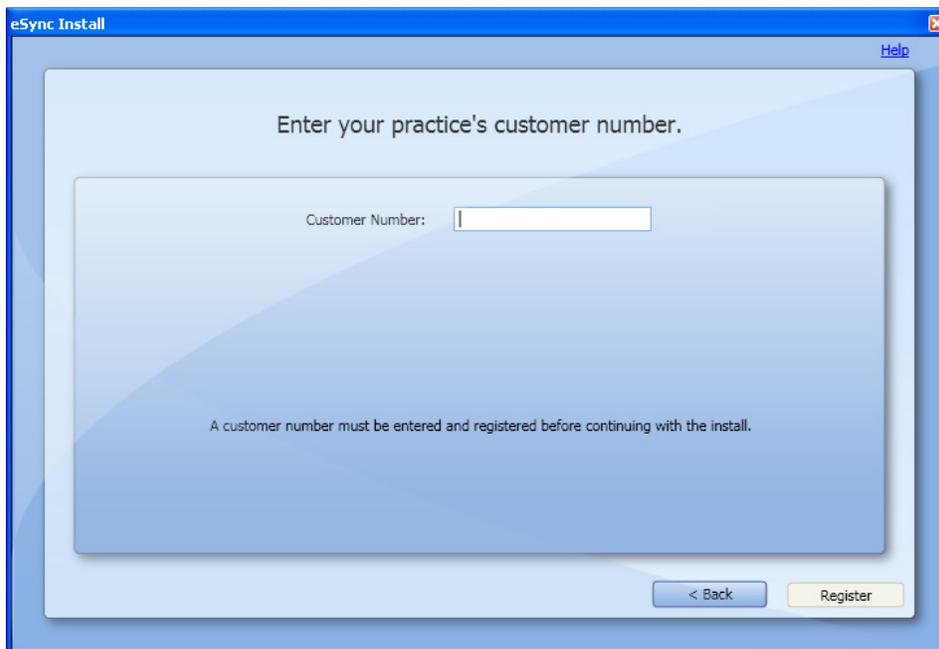
6. Type your **Customer ID Number**.

7. Click **Register**. (This button is available only if you entered a customer number.)

The eSync Install program checks for the following:

- A valid Customer ID Number
- The server version of eSync is already installed or is being installed

If the criteria are met, the installation continues.

8. The eSync installation program determines the appropriate type of eSync installation that is required and automatically starts that installation. Proceed with the eSync installation using one of the following types:

- **eSync server** – See "Installing the eSync Server" on page 4.
- **eSync client** – See "Installing the eSync Client" on page 8.
- **eSync offline client** – See "Installing the eSync Offline Client" on page 10.
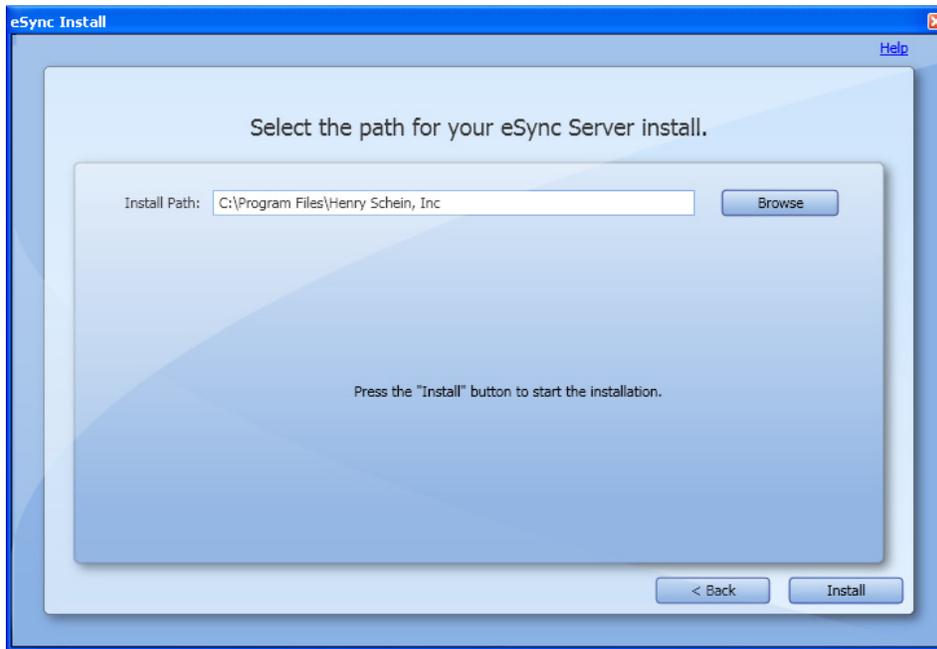
Installing the eSync Server

Install the eSync server on the computer that will handle all eSync communications and processing. (It is recommend that you install the eSync server on the computer that stores your practice management database. It is also recomended that you install the eSync server before installing any client versions.)


To install the eSync server

1. Verify that the computer meets the requirements listed in the installation window, and then click **Click to Install eSync Server**.

   The Select the path for your eSync server install window appears.

2. Leave the default **Install Path** entered, or click **Browse** to select a different location for the eSync server program files.

3. Click **Install**.

   A progress bar appears to indicate the status of the installation.

4. Depending on your practice management software, and if this is the first time you are installing eSync, eSync reviews the address corrections returned from the National Change of Address service (NCOA) for your patients. If the eSync Install program detects unresolved address corrections, you must resolve them in order to proceed with installing eSync; otherwise, proceed to step 5.
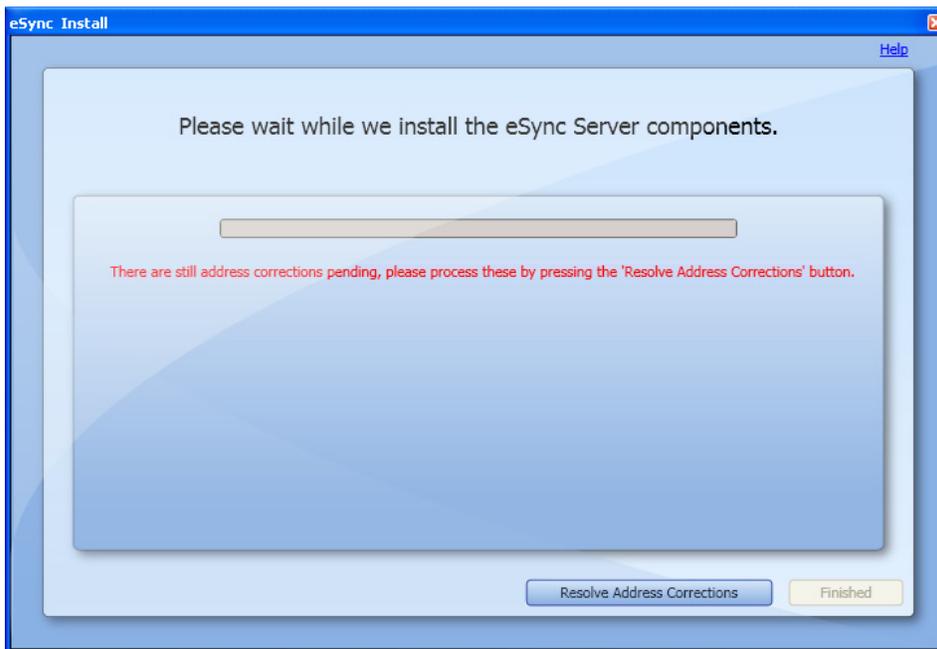

To process any unresolved address corrections, complete the following steps:

a. Click **Resolve Address Corrections**.

   The **Process Imports** dialog box appears.
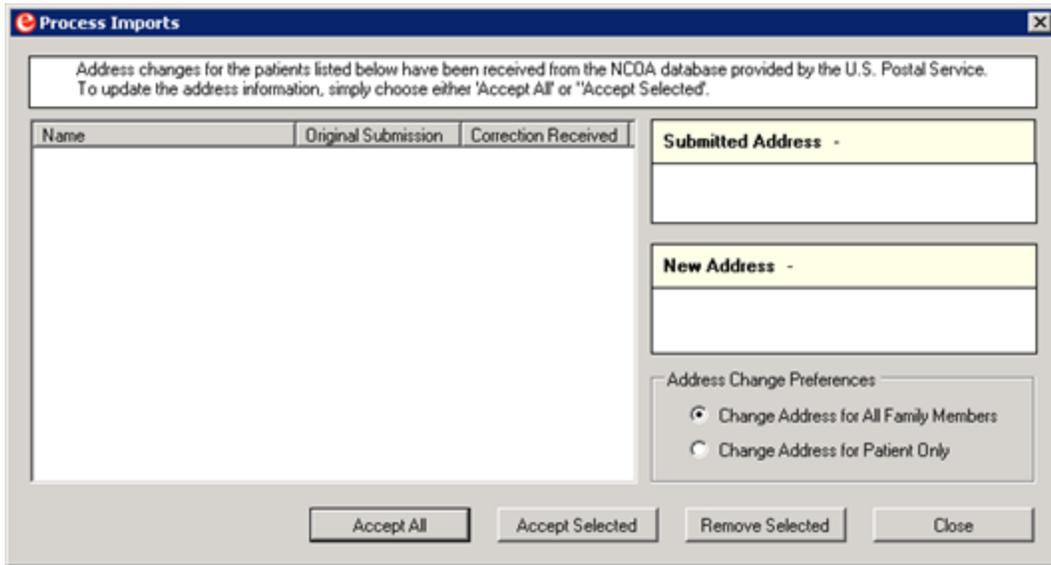
b. Select one or more patients, and then click one of the following buttons:

   • **Accept All** – To update address information for all patients listed

   • **Accept Selected** – To update address information for selected patients

   • **Remove Selected** – To remove the selected patients from the list without updating the address information for those patients.

c. After resolving all address corrections, click **Close** to close the **Process Imports** dialog box and return to the installation of eSync.

When the eSync server installation is completed successfully, a message appears containing the eSync computer name. Record the **eSync Computer Name** to install the eSync offline client, or click **Print** to print the name using a printer.
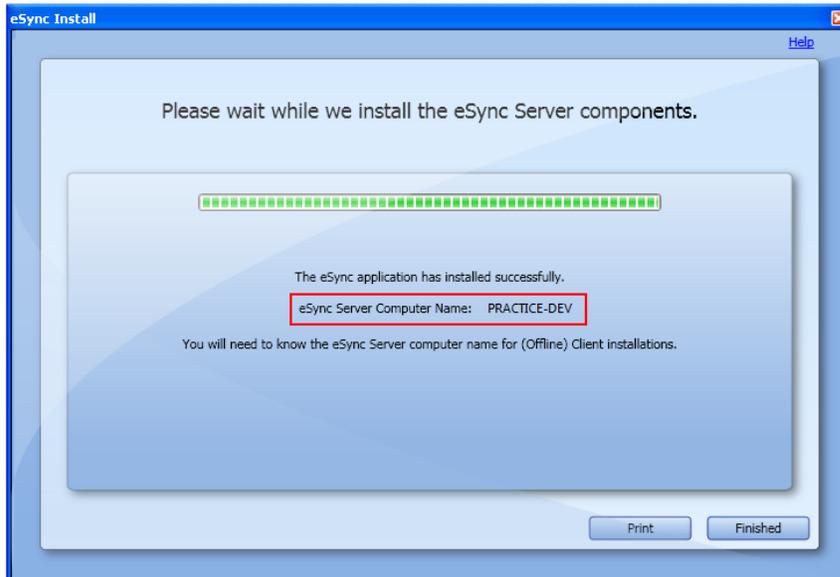

Note: If you installed the eSync server on a computer other than the practice management server, the eSync Install program displays a message stating that you must install the eSync client on the computer that you use as your practice management server.

5. Click **Finished**.

    The installation window closes, and the eSync program starts. The eSync Plug-in Manager window lets you install and use several eSync plug-ins.

6. Click the **Available** tab to see plug-ins that are available to install, or click the **Installed** tab (shown below) to see the plug-ins that are already installed.
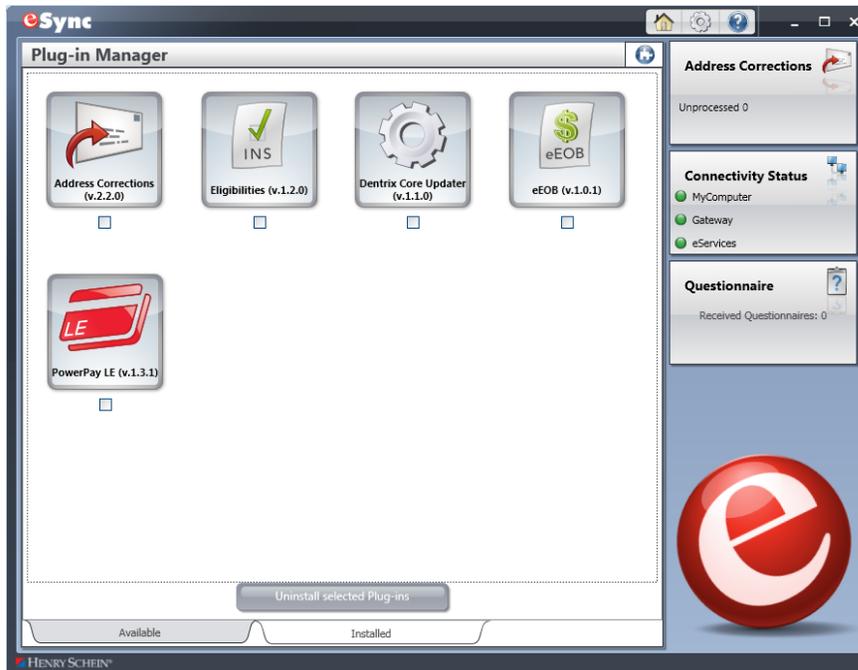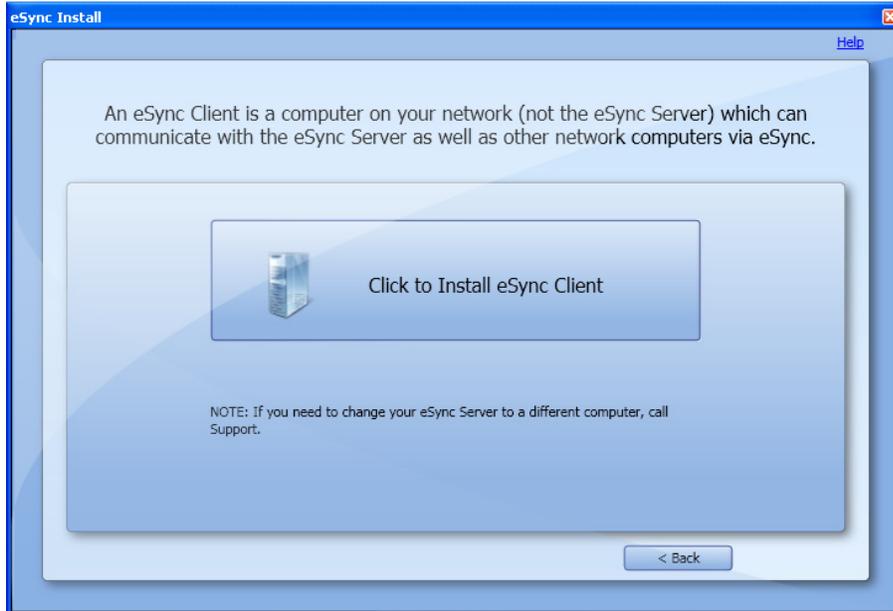

Information about each plug-in is available in the eSync Help, which is available from the eSync **Help** menu.

Note: eSync icons appear on the desktop 🔴 and in the notification area of the Windows taskbar

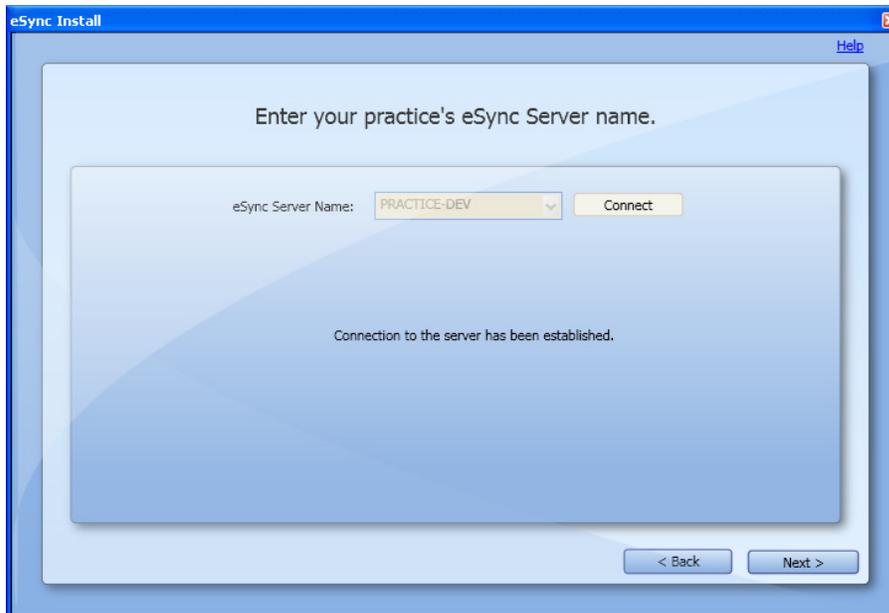.

Installing the eSync Client

Install the client version of eSync on a computer that has Internet access and is not the eSync server.

To install the eSync client

1. Click **Click to Install eSync Client**.

   The Enter your practice's eSync Server name window appears.

If the eSync server has already been installed and the system has detected it, its name will appear. If it doesn't appear, select it from the list or type it in the **eSync Server Name** field.

Note: If you do not know the computer name where your eSync server is installed, it will be detected at the end of the installation; proceed to the next step.

2. Click **Next**.

    The Select the path for your eSync Client install window appears.
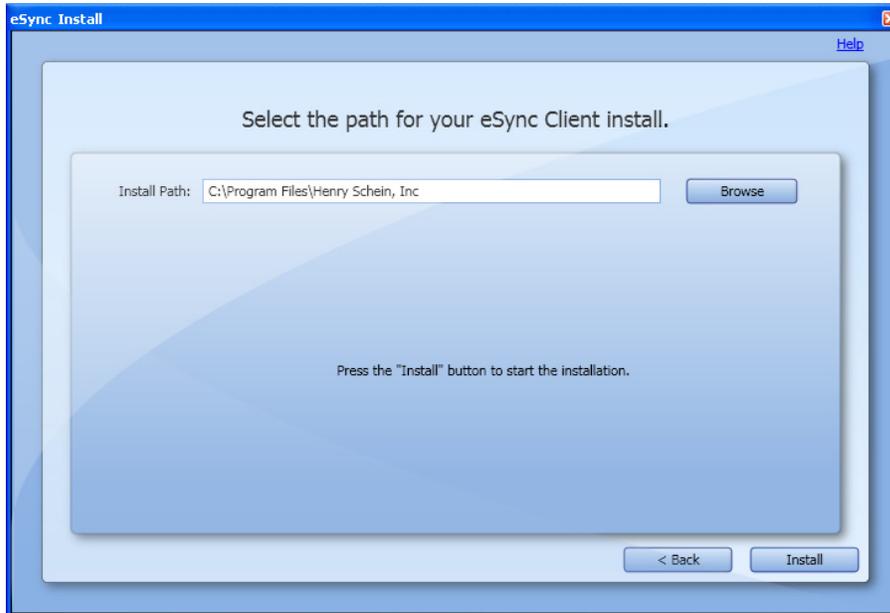
3. Leave the default **Install Path** entered, or click **Browse** to select a different location for the eSync client program files.

4. Click **Install**.

   Note: If you have not already installed the eSync server on the practice management server, and if the installation program determines that the computer on which you are currently installing eSync is not the practice management server, the eSync Install program displays a message reminding you that you must first install the eSync client on the computer you use as your practice management server.

   A progress bar appears and indicates the status of the installation. When the eSync client installation is completed successfully, a message appears.
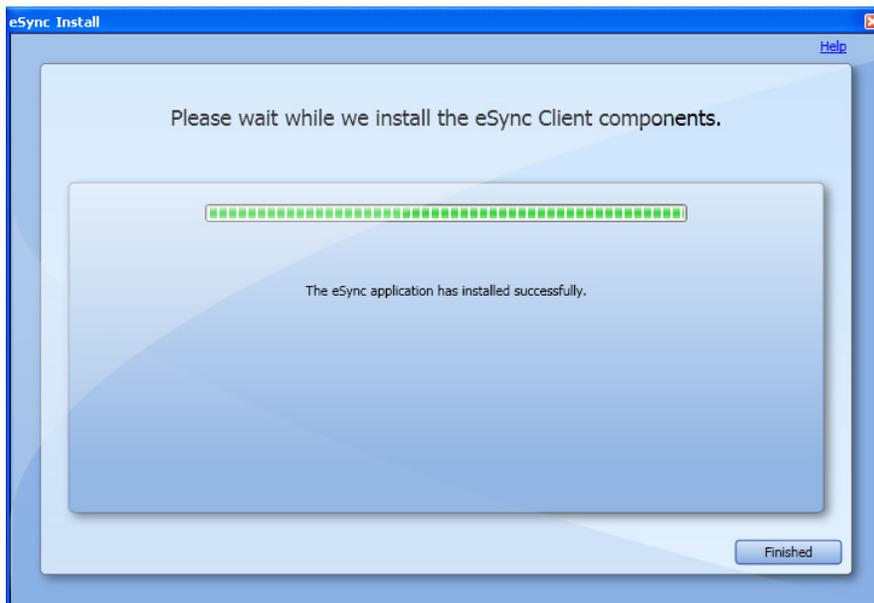
   Note: eSync checks to see if you have performed a practice management server installation. If you haven't, eSync checks to see if this computer is a practice management server. If it is not, a warning message appears, reminding you that you must install the eSync client on your practice management server.

5. Click **Finished**.

The installation window closes, and the eSync program starts.
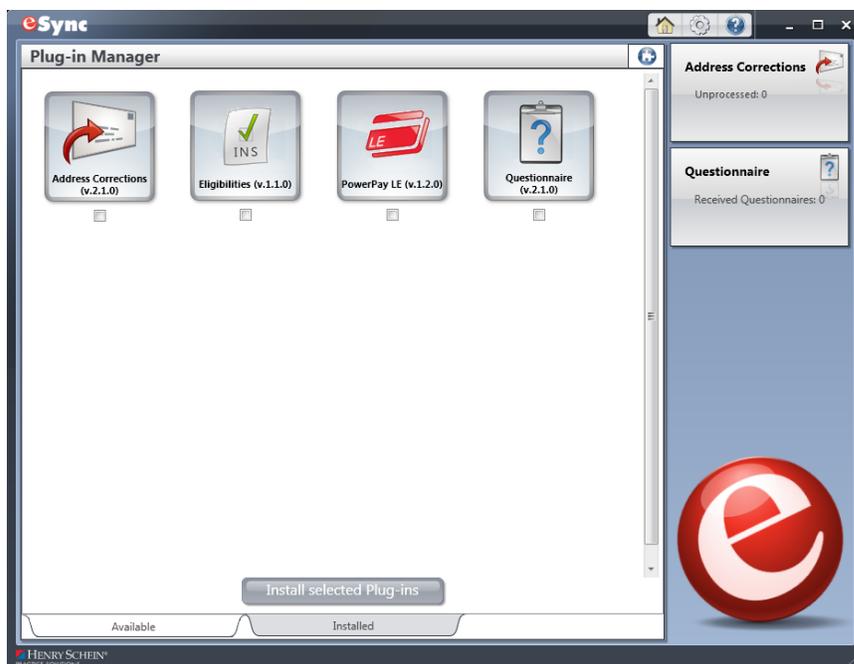
The eSync Plug-in Manager window lets you install and use several eSync plug-ins. Information about each plug-in is available in the eSync Help, which is available from the eSync **Help** menu.

Note: eSync icons appear on the desktop 🔴 and in the notification area of the Windows taskbar.

6. Enable your anti-virus software.
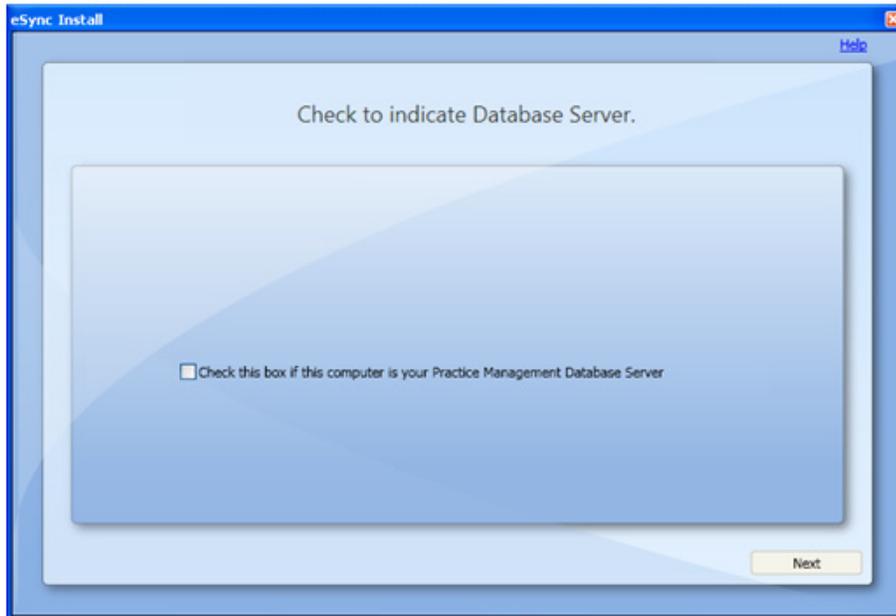
Installing the eSync Offline Client

Install the offline client version of eSync on a computer that does not have Internet access and is not the eSync server.

**To install the eSync offline client**

1. Click **Click to Install eSync (Offline) Client**.

   The Check to indicate Database Server window appears.

2. If you are installing the eSync offline client on your practice management database server, select **Check the box if this computer is your Practice Management Database Server**.
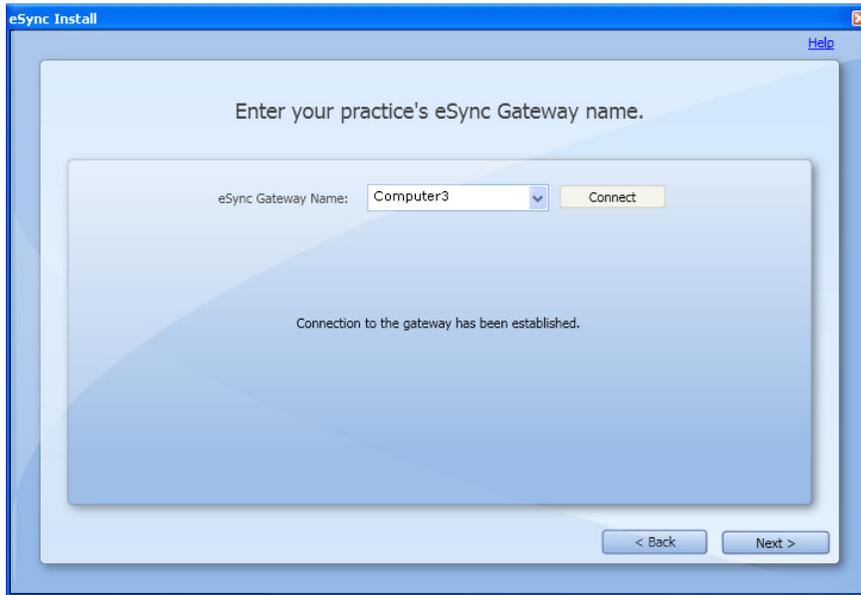
3. Click **Next**.

   The Enter your practice's eSync Server name window appears.
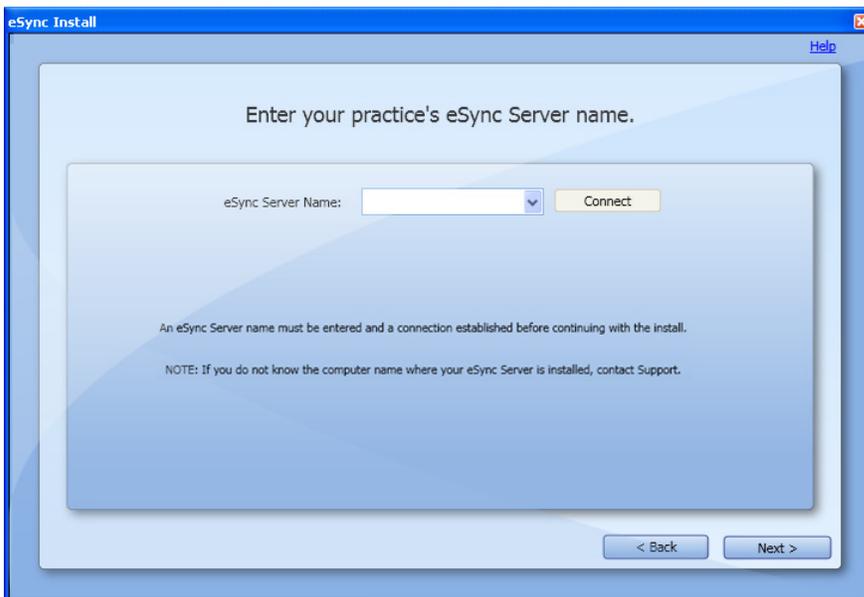
4. Type or select the eSync Server Name you recorded at the end of "Installing the eSync Server."

5. Click **Connect** to establish a connection with the eSync server. (This button is available only if you enter an eSync Server.)

The eSync Install program verifies that the eSync server computer is powered on and connected to the network.

- If an "Unable to connect to the eSync Server" message appears, verify that the computer shown next to eSync Server Name is powered on and then click **Connect** again.

- If a message appears stating that the server server name specified does not appear to be the server, type or select a different computer, and then click **Connect** again.

- If a connection to the eSync server is established, a "Connection to the server has been established" message appears.


6. Click **Next**. (This button is available only If you establish a connection to the eSync server.)

The Select the path for your eSync (Offline) Client install window appears.
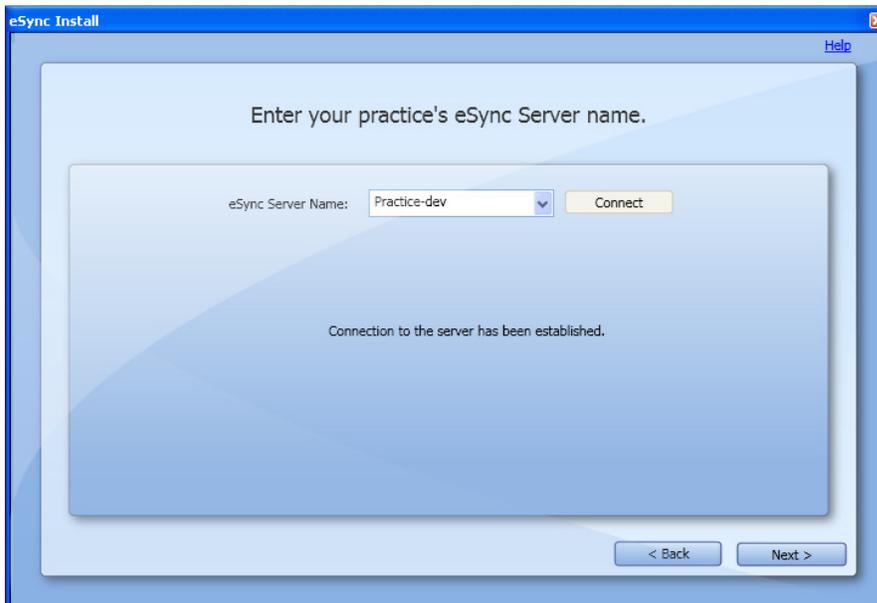
7. Leave the default **Install Path** entered, or click **Browse** to select a different location for the eSync offline client program files.

8. Click **Install**.

Note: If you have not already installed the eSync server on the practice management server (the computer with your practice management software's database), and if the installation program determines that the computer on which you are currently installing eSync is not the practice management server, the eSync Install program displays a message reminding you that you must first install the eSync client on your practice management server.

A progress bar appears to indicate the status of the installation. When the eSync offline client version installs successfully, a message appears.
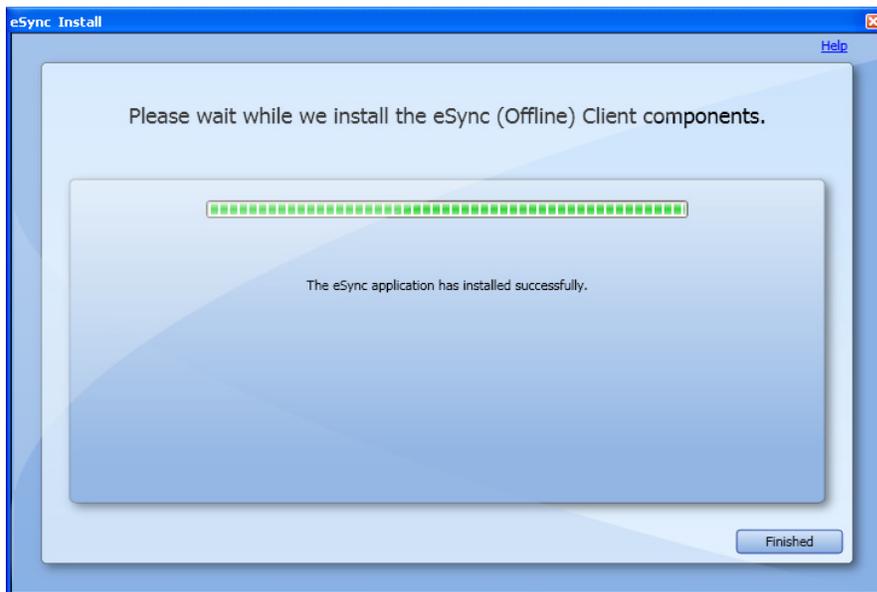
Note: eSync checks to see if you have performed a practice management server installation. If you haven't, eSync checks to see if this computer is a practice management server. If it is not, a warning message appears, reminding you that you must install the eSync client on your practice management server.

9. Click **Finished**.

   The installation window closes, and the eSync program starts.
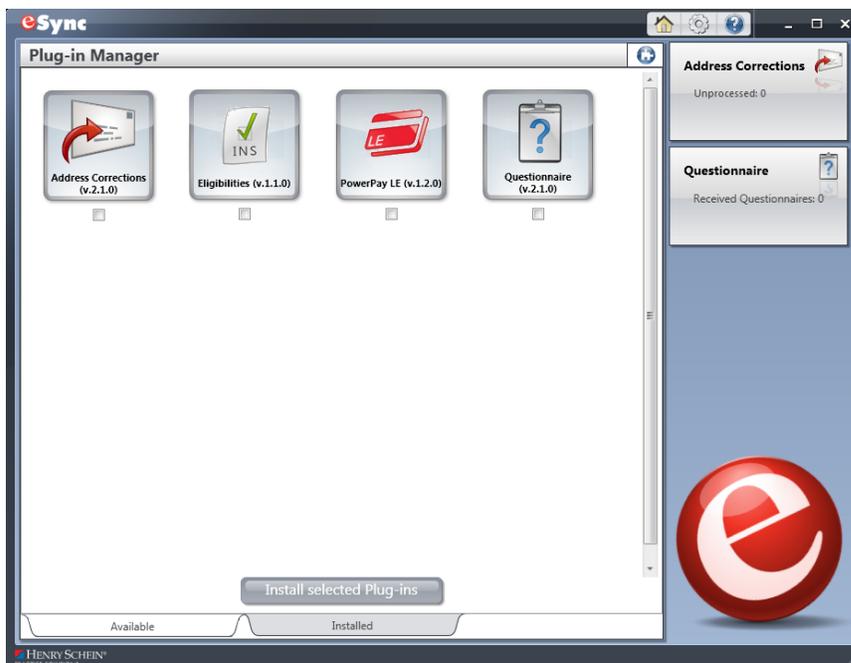
Note: eSync icons are placed on the desktop and in the notification area of the taskbar.

10. Enable your anti-virus software.

Learn More about eSync Plug-ins

eSync automatically installs plug-ins such as Dentalink, an intra-office messaging system. Information on how to set up and use these and other eSync plug-in tools is available in the eSync Help.

To view the Help for the eSync plug-ins

1. Open eSync (from the Windows Start menu, point to **All Programs > Henry Schein Practice Solutions**, and then click **eSync**).

2. In the eSync window, click the Help button to open the Help menu.

3. From the **Help** menu, select the Help that you want to open.