

**How Tos...**

1. Install Save-N-Sync Evaluation version
2. Switch between Standard and Corporate Version  
(*Evaluation version only*)
3. Basic Configuration (*Select Source/Target Combination "Filter"*)
4. Select Second Filter (*Save-N-Sync Corporate only*)
5. Select An Operation Mode



**Explanation of Features:**

**What is...**

- A. Save-N-Sync Standard Version
- B. Save-N-Sync Corporate Version
- C. The differences between Standard and Corporate Version
- D. Embedded Open File Manager (EOFM)
- E. Standard Sync
- F. Bi-Directional
- G. Replicate Source To Target

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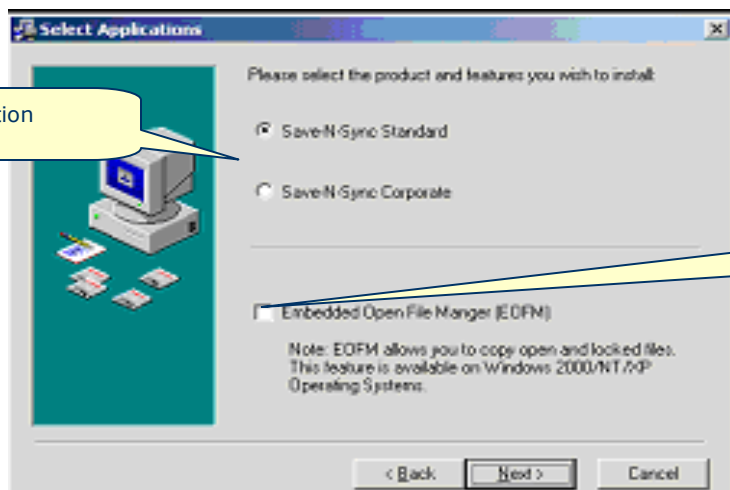
**How Tos...**

**1. How to Install Save-N-Sync Evaluation version:**

- 1.1 From the main page of the PeerSoftware.com website click on the "Download" button and then select the "Download Trial" option.
- 1.2 A page with a list of available evaluation download opens. Click on the **Save-N-Sync** selection box and fill in the contact information at the bottom of the page. Submit.

An e-mail will be generated with a download link for you to install the Evaluation version of the Save-N-Sync product.

- 1.3 Once you have received the confirmation e-mail, click on the link provided for the download.
- 1.4 A web page will come up with your information (product, name, company and e-mail). Verify that the information is correct and click "OK".
- 1.5 The link of the product you have requested to evaluate will appear on this next page. Click on it.
- 1.6 A message box will come up. Choose Open and follow the on screen instructions to complete the installation.
- 1.7 Once on the "Select Applications" screen, you may choose to install the **Standard** or **Corporate** (refer to *Explanation of Features A, B and C* for more information on the two editions) version of the product (You will be able to switch between versions at a later time from the application main interface. Refer below to *HOW TOs #2*). (Refer to *Image 1.1*)



(Image 1.1)

Edition Option

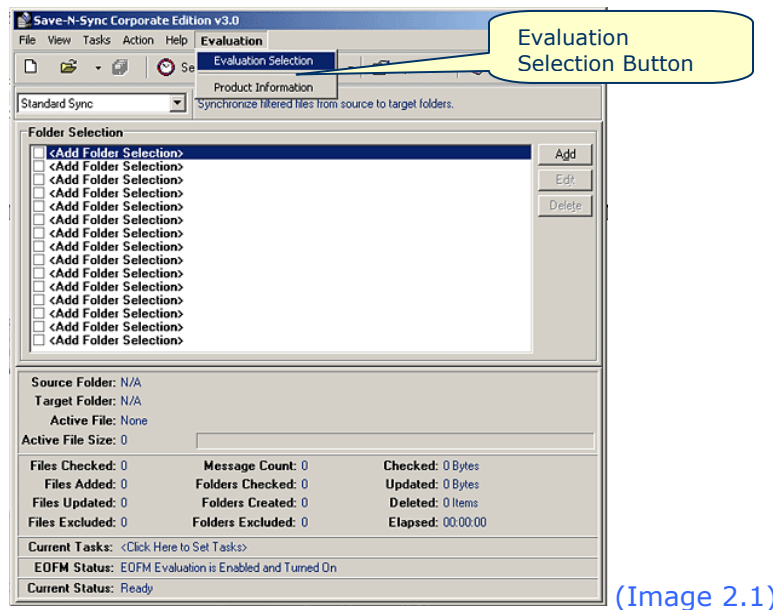
Embedded Open File Manager Option

- 1.8 This “Select Applications” screen also gives you the option of enabling **[Embedded Open File Manager](#)** (EOFM). (Refer to *Explanation of Features C for further information*)

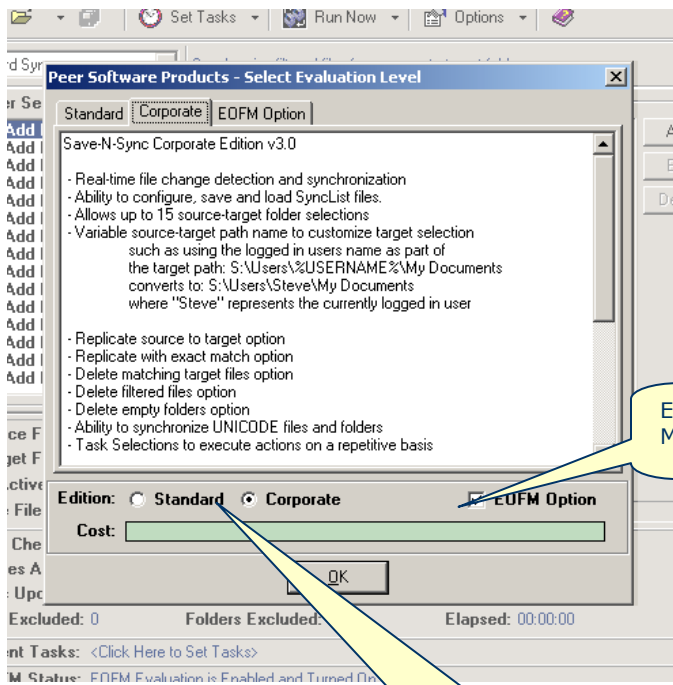
## 2. How to Switch between Standard and Corporate Version (Switch action available only in Evaluation Version)

**The Evaluation Version enables the user to switch between Standard and Corporate edition to best analyze which version best suits the individuals needs.**

- 2.1 From the main interface click on the top Toolbar “Evaluation” button. (Refer to *Image 2.1*)

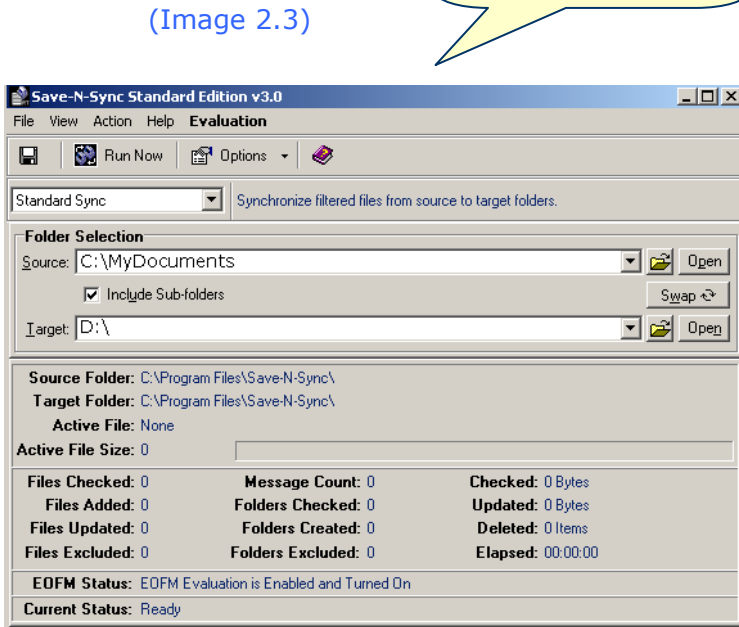


- 2.2 On the bottom of the screen, select the edition desired for evaluation (*Standard or Corporate*). (Refer to *Image 2.2*)
- 2.3 On this same screen you will have a chance to add the Embedded Open File Manager to the selected edition simply by selecting “EOFM option” on the bottom right hand corner. *The Embedded Open File Manager will require a re-boot of the machine before it takes affect.*

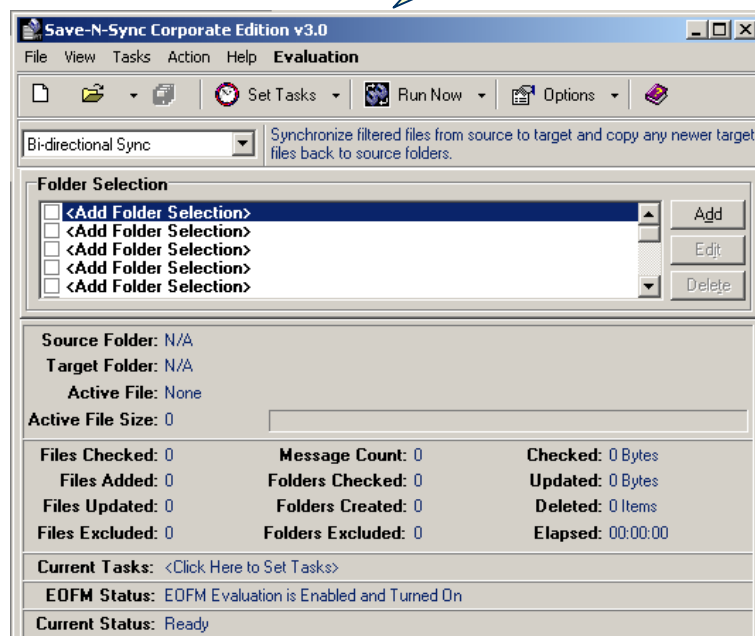


(Image 2.2)

2.4 After the selections have been made you will see your main user interface changed to reflect the individual features of the previously selected edition.  
(Refer to Image 2.3)



(Image 2.3)



### 3. Basic Configuration

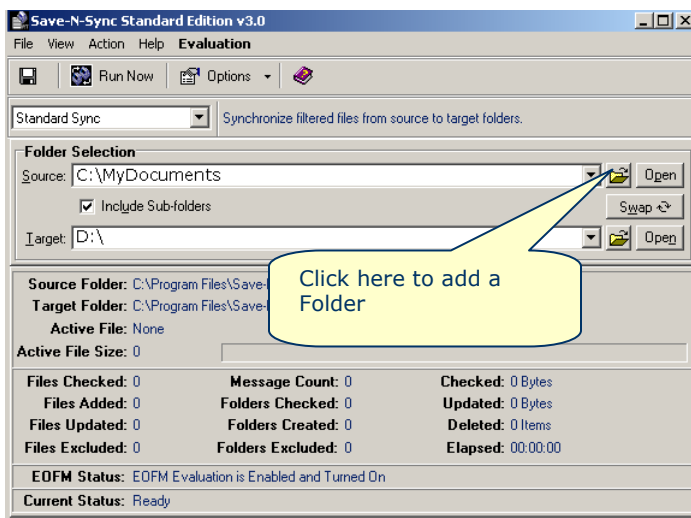
#### (How to select Source/Target Combination "Filter")

**Source Filter:** This is the folder where the local files are stored (i.e. My Documents).

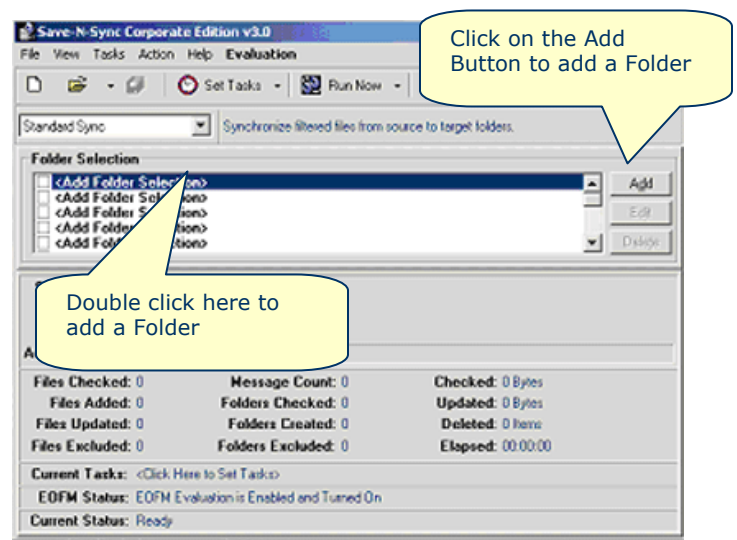
**Target Filter:** This is the folder on your secondary drive where your files will be copied to (OR SYNCHRONIZED) (i.e. your laptop, PC, Backup storage device, etc.).

- 3.1 Open the Save-N-Sync Application.
- 3.2 From your Main Interface, double click "Add Folder Selection" in the center of the interface or click on the "Add" button on the right of the screen. (Refer to Image 3.1).

(Image 3.1)

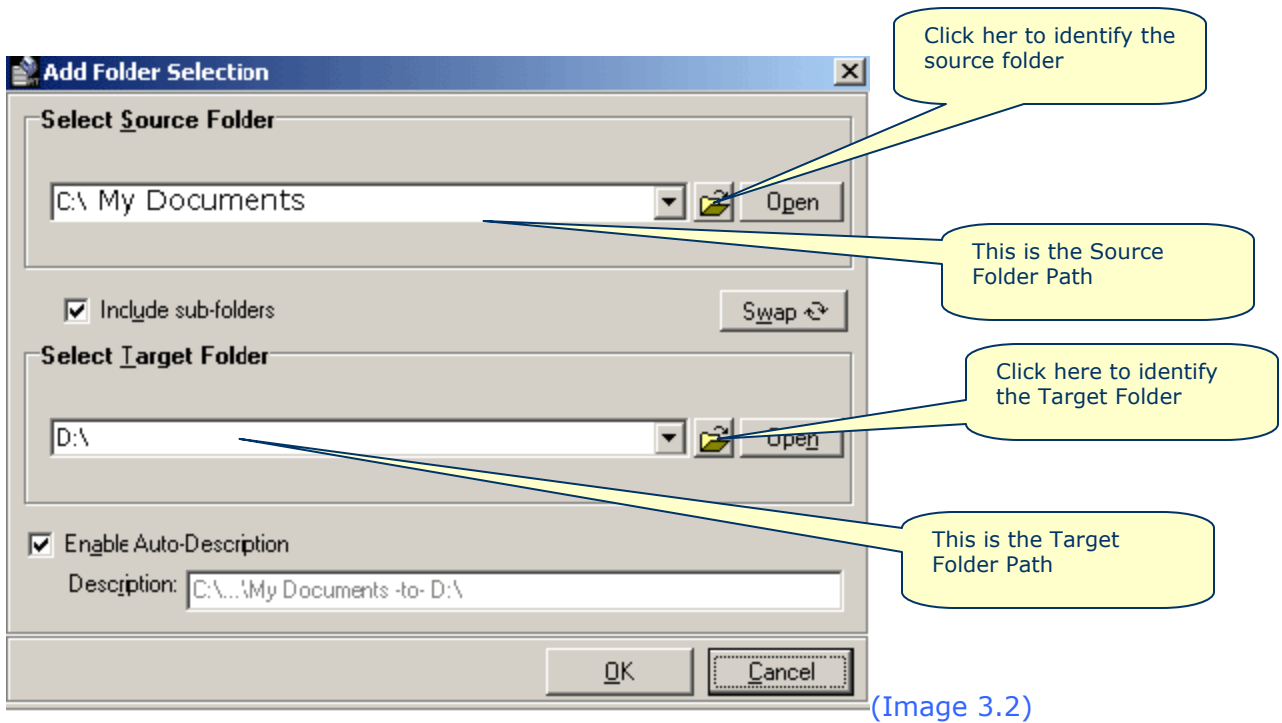


Standard Version

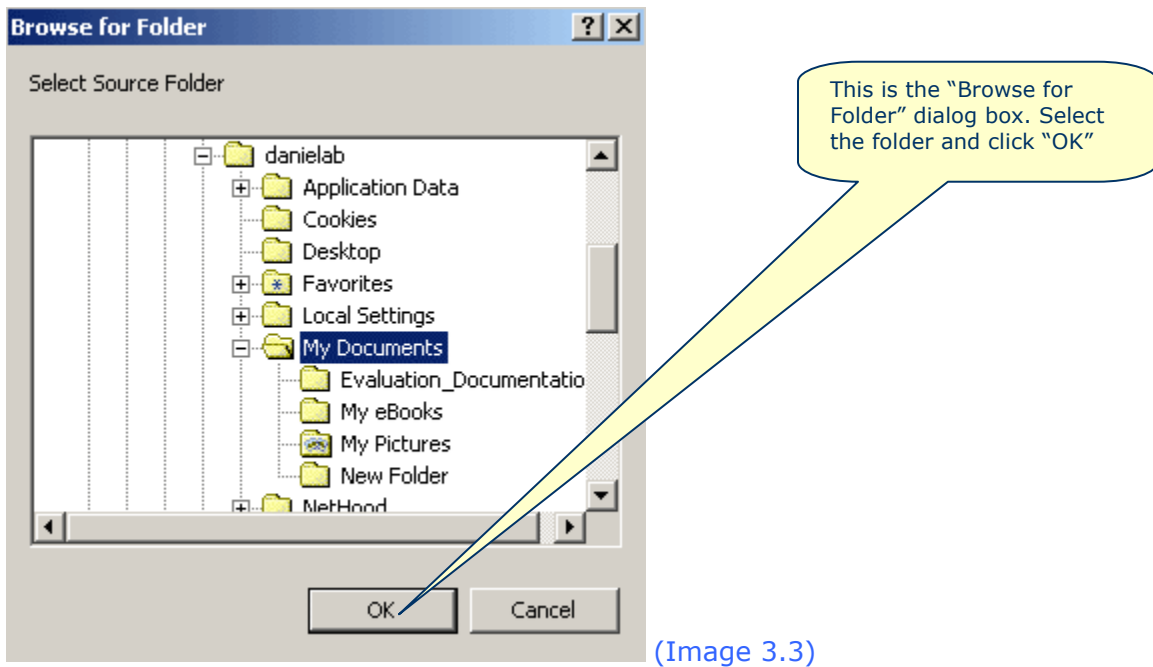


Corporate Version

- 3.3 Select Source Folder - From your Add Folder Selection Display Interface (shown above in image 3.1 for the Standard Edition as being the main interface), click on the Folder Icon to the right of the screen (Refer to Image 3.1 for the corporate edition). This action will open the "Browse for Folder" dialog box (Refer to Image 3.2).



- 3.4 Use the "Browse for Folder" dialog box to locate your chosen Source Folder, select it using the left mouse button, and click "OK". (Refer to Image 3.2)



- 3.5 When the Source Folder has been selected, you may click the Open Button and a traditional MS navigation window is opened displaying the contents of whichever folder is currently shown in the Source Folder Selection.

- 3.6 Select Target Folder - Repeat steps 3.3 through 3.5, using the Select Target Folder icon. (Refer to Image 3.1)
- 3.7 Click the "OK" button to return to the main Interface.

#### 4. How to Select Second Filter (Corporate Version only)

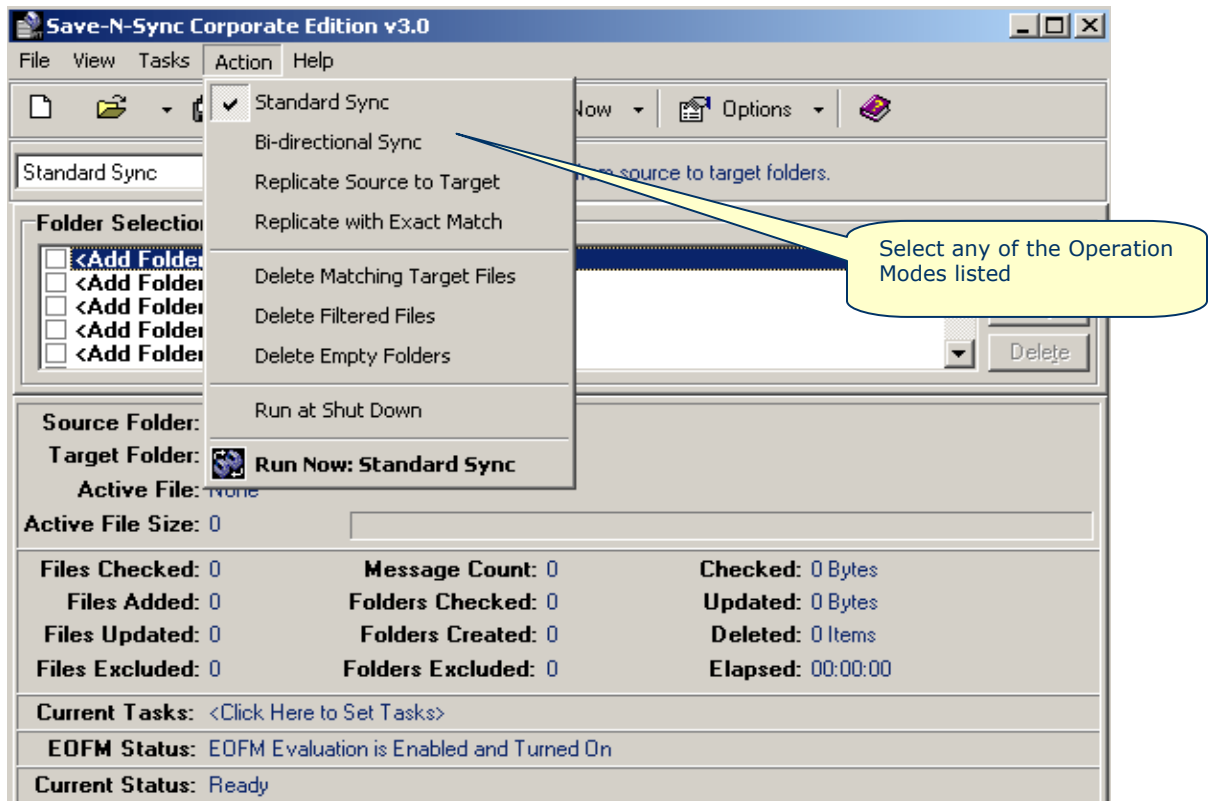
The Folder Selection List, available to Save-N-Sync Corporate Versions only, allows you to select multiple Source and Target Folders selections. The Corporate Level allows 15 Source/Target Combinations.

- 4.1 To select an additional Filter simply follow steps 3.2 through 3.7 from the previous instructions.

#### 5. How to Select and Operation Mode

**By default the Standard Sync operation mode is checked.**

- 5.1 To select an Operation Mode click on the "Action" button on your Main Bar. (Refer to Image 5.1)



(Image 5.1)

- 5.2 Now select the operation mode best suited to your needs, simply by left clicking on it. (Refer to Image 5.1)  
For an in-depth explanation of the individual Operation Modes refer to Explanation of Features E, F and G.

### 5.3 Click 'Run Now' to Start the Synchronization Job.

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#### Explanation of Features:

##### A. What is Save-N-Sync Standard Version:

Save-N-Sync Standard Version features the following:

- ✓ One Source/Target (filter) Selection
- ✓ Run at Startup, shut down, on demand, or from a desktop shortcut
- ✓ Standard synchronization (new or updated files in the Source Folder are copied to the Target Folder)
- ✓ Bi-Directional Synchronization (same as Standard Synchronization, with the addition of new or updated files in the Target Folder are copied back to the Source Folder)

##### B. What is Save-N-Sync Corporate Version:

Save-N-Sync Corporate Version includes all the features of the Standard edition as well as additional ones below:

- ✓ 15 Source/Target (Filter) Selections
- ✓ Run at Startup, shut down, on demand, or from a desktop shortcut
- ✓ Run on an interval (i.e. every 60 seconds, every 15 minutes, etc.)
- ✓ Real-Time Updating
- ✓ Extensive scheduling and task manager
- ✓ Standard Synchronization (new or updated files in the Source Folder are copied to the Target Folder)
- ✓ Bi-Directional Synchronization (same as Standard Synchronization, with the addition of new or updated files in the Target Folder are copied back to the Source Folder)
- ✓ Replicate Source to Target (files deleted on the source are also deleted on the Target)
- ✓ Other replications/synchronization options

##### C. The differences between Standard and Corporate Version:

**Save-N-Sync Matrix**

Features	Standard	Corporate
Source/Target Pairs Allowed	1	15
Basic Source/Target Synchronization	☐	☐
Bi-Directional Synchronization	☐	☐
Password Protection	☐	☐
Include/Exclude Filters for Files and Folders	☐	☐
Open File Manager (Optional)	☐	☐
Log File Generation	☐	☐
Run at Startup/Shutdown	☐	☐
Extended Synchronization Modes		☐
Daily Timer Synchronization		☐
Real-Time Synchronization		☐
Interval Synchronization		☐
Unicode Support		☐
Variable Path Selection		☐
<b>Platform:</b> Windows 98/NT/2000/XP*		
<b>Note:</b> Save-N-Sync cannot be installed on a Windows Server, but can synchronize to Servers. Embedded Open File Manager (Optional) cannot be		

#### D. What is Embedded Open File Manager:

- ✓ EOFM can be added to Save-N-Sync Standard or Corporate edition.
- ✓ By itself, Save-N-Sync copies open and non-locked files such as MS Word, Excel, picture files, drawing files etc. With the addition of the EOFM option, Save-N-Sync can copy opened and locked files such as data base files, Outlook .pst files, etc.
- ✓ EOFM can only run on MS Windows XP Home/Professional or NT Workstation.

#### What the EOFM option can do for you:

- ✓ Open locked source files for complete backup to selected Target Folders.
- ✓ Allow files used by MS Outlook (.pst) to be backed up while Outlook is in use.
- ✓ Allow QuickBooks, or Quicken files to be backed up in the background without the user intervening.
- ✓ Allow any active database files to be backed up automatically without disrupting normal operations.

#### What EOFM will NOT do for you:

- ✓ EOFM cannot overwrite Target Files that are opened or in use.
- ✓ EOFM will not merge changes from one database to another.

- ✓ EOFM will not merge record changes between different MS Outlook sessions.

**Note:** *Changes requiring EOFM for access will be queued to run on a two-hour interval when Save-N-Sync is in Real-Time Mode.*

#### **E. What Is Standard Sync:**

This synchronization mode allows the user to copy files from the Source Folder to the Target Folder.

#### **F. What is Bi-Directional:**

This synchronization mode allows the user to copy files from the Source Folder to the Target Folder and from the Target Folder to the Source Folder. By choosing this mode if the application detects any new or updated files in the Target Folder at Run time, the Source folder will receive a copy of the files.

#### **G. What Is Replicate Source to Target:**

This synchronization mode gives the user the ability to run a Standard Sync (copy files from the Source Folder to the Target Folder) and delete any files from the Target Folder that are not found in the Source Folder.