SmartOffice Mobile for Palm User Guide

# Smart Office



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918 E. Green Street Pasadena, CA 91106 Web: <u>http-//www.ez-data.com</u>

Telephone: (626) 585-3505 Fax: (626) 440-9097 U.S. toll-free fax: (800) 779-3123

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# Introduction

SmartOffice Mobile for Palm is a custom application developed by E-Z Data to synchronize information between SmartOffice and a Palm OS device. The application uses iAnywhere Solutions' Ultralite database and MobiLink Server to synchronize data without interfering with existing applications on the device.

The following types of information can be synchronized:

- Contact Individual
- Contact Business
- Activity
- SmartPad
- Policies
- Investments

# Installing SmartOffice Mobile for Palm

- 1. Log into SmartOffice.
- 2. From the side menu, click User Setup and Installations to open the Installations spreadsheet.
  - User Setup
  - User Preferences
  - User Management
  - Record Sharing
  - Installations
  - Homepage Personalization
- 3. The Installations spreadsheet displays all the available installations. From this spreadsheet, click the **SmartOffice Mobile for Palm and Pocket PC** link.
- 4. Select the **Click here to download and install SmartOffice Mobile for Palm** option to begin the installation file download.

🚰 SmartOffice	×
Install SmartOffice for Mobile devices	
Install SmartOffice for Mobile devices by selecting the following link SmartOffice files will be installed on your device before synchronization.	s.
Click here to download and install SmartOffice Mobile for Palm.	
Click here to download and install SmartOffice Mobile for Pocket PC.	
Cancel	

5. From the File Download dialog box, click the **Open** button to start the installation. Alternatively, the installation file can be saved to the PC and installed from the saved location.

File Dowr	nload 🔀
?	Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.
	File name: ezm_palm.exe
	File type: Application
	From: 192.168.2.54
	This type of file could harm your computer if it contains malicious code.
	Would you like to open the file or save it to your computer?
	<u>Open</u> <u>Save</u> Cancel <u>M</u> ore Info
	Always ask before opening this type of file

6. If the username assigned to the Palm device does not appear in the **User** field, click the down-arrow at the right of the field and select the user name before clicking the **Done** button.

🖳 Install Tool			×
∐ser: <b>Test</b> File(s) listed below will be installed o time you perform a HotSync operat	on your handhel	▼ d the next	
File Name	File Size D	estination	<u>A</u> dd
SmartOffice.prc	511KB 星	Handheld	<u>R</u> emove
			Done
		Change Destination	
Tips: Find other applications to http://www.palm.com The 'Add' button looks fir C:\PROGRAM FILES\P/ place to store downloade	install on your h st in the \ADD-( ALM folder. This id handheld files	nandheld at DN folder inside your folder is a convenient s	

7. When prompted, begin a HotSync on the PDA to install SmartOffice Mobile. Once the HotSync is complete, click the **OK** button.



# Setting Up SmartOffice Mobile for Palm

Accessing SmartOffice Mobile on the Palm OS Device

To start SmartOffice Mobile, tap the SmartOffice icon.



When opening SmartOffice for the first time, the Security Information window is displayed. The user will have the option to either enable or disable security for the device. Once security is enabled, the only way to remove it is to uninstall and reinstall the SmartOffice Mobile application.

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Security Information	
SmartOffice Mobile	
Enabling security on this device will encrypt the database and require	SmartOffice Mobile Login
a password whenever SmartOffice Mobile is accessed. Do you wish to enable security?	Enter Security Password Password : []]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]
Yes No	ОК
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Click the **Yes** button to enable security and display the SmartOffice Mobile Login window. The password is required each time SmartOffice Mobile is opened. The password must be at least 6 characters with at least one alpha and one numeric character. The password can be changed at any time by accessing the Security Password option from the main SmartOffice Mobile menu. Once the password has been entered and the user taps the **OK** button, the Synchronization Options window opens.

🕒 Palm OS Garnet Simulator - [Simul 🗔 🗖 🗙
Synchronization Options
Sync Method: 🗹 HotSync
Protocol: 🗹 TCP/IP 🔲 HTTP
SmartOffice Login Information:
Office : reno
User : daniel
Password : Assigned 🛛 🗖 eOCS User
Mobilink Sorvor Dotails:
Host : 192.168.2.171
Port : 2439
( Done )
ag

**SyncMethod:** By default, the HotSync option is selected for use with a cable/cradle connected to a PC with Palm Desktop and the HotSync Manager installed. This option can be cleared for synchronization with a wireless enabled device.

**Protocol:** Select the communication protocol used to communicate with the MobiLink Server. The options are TCP/IP, HTTP, or HTTP using a Web server (An additional checkbox is displayed when HTTP is selected for specifying synchronization using a Web server). This information will be provided by E-Z Data for SmartOffice Online users and by the IT department of corporate implementations.

**SmartOffice Login Information:** The Office, User, and Password for accessing SmartOffice must be entered in the appropriate fields. To enter the password, tap the **Unassigned** box, enter and confirm the SmartOffice login password and then tap the **OK** button. The password now shows as Assigned. If the SmartOffice One Card System (eOCS) is being used with SmartOffice, select the **eOCS User** option to enable One Card System outcomes when tracking activities.

**MobiLink Server Details:** The host URL or IP address and port assigned to the MobiLink Server must be entered in order to synchronize successfully. This information is provided by E-Z Data for SmartOffice Online users and by the IT department of corporate implementations.

Once the correct information has been entered on the Synchronization Options window, tap the **Done** button to save the information.

## Setting Up SmartOffice Mobile Synchronization Criteria

1. From the side menu, click **Synchronization** and then select **Mobile Device Setup** to open the Synchronization Setup Wizard.



2. From the first window of the Synchronization Setup Wizard, click the Next button.

SmartOffice Web Page Dialog	×	
SmartOffice Mobile Device - Synchronization Setup Wizard		
Welcome to the SmartOffice for Mobile Device Synchronization Setup Wizard. Click Next to proceed.		
SmartOffice Mobile Device Synchronization		
< Back     Next >     Finish     Cancel       © 2000-2005 E-Z Data, Inc. All rights reserved.		

3. Choose to synchronize all contacts or selected contacts and then click the Next button.

SmartOffice Web Page Dialog		X
SmartOffice Mobile Device - Contact Selection		
Define the contact records to be synchro	nized.	
	Contact Selection <ul> <li>All Records</li> <li>Selected Records</li> </ul>	
< Back Next >	Finish	Cancel
© 2000-2005 E-Z Data, Inc. All rights rese	rved.	

If All Contacts is selected, continue to Step 4. Otherwise, the Set Selection dialog box opens. Select a Set of contacts to synchronize.

🗳 SmartOffice Web Page Dialog 🛛 🛛 🚺		
Set Selection		
Select contacts to synchronize based on a set.		
Sef Clients		
OK Cancel		
© 2000-2005 E-Z Data, Inc. All rights reserved.		

4. Select a date range of future and past activities for synchronization. Click the Next button to continue.

🗿 SmartOffice Web Page Dialog 🛛 💦 🔁			
SmartOffice Mobile Devic	SmartOffice Mobile Device - Activity Selection		
Select the type and date ra	inge of activities to be s	ynchronized.	
	Activity Type <ul> <li>All</li> <li>Timed</li> </ul>	Activity Date Range Next 30 day(s) Previous 15 day(s)	
Sack © 2000-2005 E-Z Data, Inc.	ext >	Finish Cancel	

5. From the SmartPad Selection screen, select the number of SmartPad entries to synchronize. Only SmartPad records from the time frame specified for the last *x* months will synchronize. Either all SmartPad records can be synchronized or only manually entered SmartPad Notes depending on the selection made. Click the **Next** button.

🗿 SmartOffice Web Page Dialog 🛛 🛛 🔀			
SmartOffice Mobile Device - Smart	SmartOffice Mobile Device - SmartPad Selection		
Select the number of SmartPad entr	ies to download for each contact.		
	Specify SmartPad Downloading Options		
	$\begin{array}{cccccccccccccccccccccccccccccccccccc$		
	SmartPad entries for last 6 month(s)		
	SmartPad Notes Only		
Warning: Downloading a large number of SmartPad entries can dramatically increase the time required to synchronize.			
Sack Next > © 2000-2005 E-Z Data, Inc. All rights	Finish Cancel		

6. The final Synchronization Setup Wizard window is a review of the information selected for synchronization. If all of the information is correct, click the **Finish** button.

🗿 SmartOffice Web Page Dialog 🛛 🔀							
SmartOffice Mobile Device - Download Description							
Synchronization will be based on the selected criteria:							
	All Contacts.						
	All Activities for the next 30 days and previous 15 days						
	Three SmartPad(s) per Contact.						
1	To change the selection, click the Back button.						
1	Click the Finish button to save the Setup.						
< Ba	ck Ilext > Finish Cancel						
© 2000-2005 E-Z Data, Inc. All rights reserved.							

# **Preparing Data for Synchronization**

After the criteria for synchronization has been selected, an initial synchronization must be performed.

- 1. From the SmartOffice side menu, click **Synchronization** and then select **Update Mobile Device** to open the Update Mobile Device with Changes dialog box.
- 2. Select the **Perform a full refresh of the data from SmartOffice** option to prepare data that meets the setup criteria for synchronization.
- 3. Perform a HotSync with the PDA to complete the initial synchronization.

**Note:** Synchronization can either be performed with the device connected to a PC or wirelessly with a wireless enabled device. To synchronize while connected to a PC, perform a HotSync operation using the cable or cradle that came with the device. To synchronize with a wireless enabled device, tap the synchronize option from the main SmartOffice Mobile menu.

# **Using SmartOffice Mobile**

# SmartOffice Tab

Tap the **SmartOffice** tab to open a list of options.

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SmartOffice	Options
æ	Contact /C Calendar /L To Do /D
SmartOffice <sup>™</sup> Mobile	Synchronize /S Sync Options /O Preferences /F
version 5.0 for Palm OS	About SmartOffice /T
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## **Contact Tab**

From the SmartOffice tab, select **Contact** to display an alphabetical listing of the contact records in SmartOffice Mobile. In order to find a specific contact, enter the first few letters of the first or last name to only display those records matching the find criteria:



## **Creating an Individual Contact Record**

- 1. From the SmartOffice tab, select **Contact** to display a list of contacts.
- 2. Tap the **New** button to open the Record Type dialog box.
- 3. Select the **Individual** option and then tap the **Done** button to display the Details tab.

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	Edit 🔻 Client 🛛 🛞 🖾 🖂
	Last Name: Miller
	First Name: James
RecordType	Greeting: Jim
	Suffix: Jr.
Select the type of contact	Title: Mr.
	Sub-Type: A Client
laubivibul 🔽	Source: Hnderson
	Sub-Source: Referred
	Income: 75000
	(Done) (Cancel) (Details) (Delete)
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- 4. Enter the contact information and then tap the **Phone**, **Address**, and **E-mail/Web** buttons to enter the corresponding information. Additional information can be added by tapping the **Details** button.
- 5. Tap the Done button to save the information and display the Contact View tab. Note: The Contact View tab only displays the Preferred Phone, Address, and E-mail/Web Address. Any additional phone numbers, addresses, and e-mail/Web addresses can be accessed by tapping the icons on the upper right of the Contact View tab.



**Note:** A small telephone icon will display to the right of telephone numbers on devices with phone dialing capabilities. In order to dial the phone number, tap on the phone icon next to the number.

## **Contact Phone List**

- 1. From the Contact View tab, tap the **Phone** icon to display the Phone List tab.
- 2. Tap the **New** button to open the Phone Details dialog box.

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Residence (909) 764-9845 🛞 Business (909) 764-5894 🛞	Phone Details				
	Type ▼ Residence				
	Hrea Code 1909 Phone# 764-9845				
	Exten.				
	Remarks				
Done New	Done (Cancel (Delete) 🗹 Preferred				

- 3. Tap the **Type** drop-down arrow to specify the phone type.
- Enter the remaining phone information and then tap the **Done** button to save the additions.
   Note: A small telephone icon will display to the right of telephone numbers on devices with phone dialing capabilities. In order to dial the phone number, tap the phone icon next to the number.

#### **Contact Address List**

- 1. From the Contact View tab, tap the Address icon to display the Address List tab.
- 2. Tap the New button to open the Address Details dialog box.

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Address L	ist James Miller	Address Details					
Residence	234 North Ave	Туре	🕶 Business				
L .	Miller City CA 24564	Address	B26 Whilshire Bl	vd.			
Business	326 Whilshire Blvd.	Line 2					
	Westwood CH 31210	Line 3					
		City	Westwood				
		State	CA				
		Country	USA Zip	91210			
		Remarks					
		Preferred 🗆					
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- 3. Tap the **Type** drop-down arrow to select the address type.
- 4. Enter the remaining address information and then tap the **Done** button to save the additions.

#### **Contact E-Mail/Web Address List**

- 1. From the Contact View tab, tap the **E-mail/Web** icon to display the E-mail/Web List tab.
- 2. Tap the **New** button to open the Web Address Details dialog box.

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E-mail/\	Neb James Miller		
E-Mail	miller j@mail.com		
Web Site	www.jmiller.com	We	bAddress Details
		Туре	🕶 E-Mail
		Address	miller j@mail.com
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- 3. Tap the **Type** drop-down arrow to select E-mail or Web Site.
- 4. Enter the remaining E-mail/Web information and then tap the **Done** button to save the additions.

## **Contact Details Dialog Box**

1. From the Contact View tab, tap the **Details** button to open the Contact Details dialog box.

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Contact View 🛛 🛞 🔂 🖂					
James Miller					
(Jim)					
924 North Aug					
Contact Details					
Birth Date 05/25/1962 🔻 Age 43					
Employer					
Occupation Medical					
Job Title Doctor					
Done Cancel					
a <sub>6</sub>					

2. Enter the contact personal information and then tap the **Done** button to save the additions.

#### **Modifying a Contact Record**

- 1. From the Contact View tab, tap the **Edit** icon to open the Details tab.
- 2. Modify the information as necessary and then tap the **Done** button to save the changes.

#### Modifying a Contact's Phone Number

- 1. From the Contact View tab, tap the **Phone** icon to display the Phone List tab.
- 2. Tap the phone number to be modified in order to open the Phone Details dialog box.
- 3. Modify the information as necessary and then tap the **Done** button to save the changes.

#### Modifying a Contact's Address

- 1. From the Contact View tab, tap the Address icon to display the Address List tab.
- 2. Tap the address to be modified in order to open the Address Details dialog box.
- 3. Modify the information as necessary and then tap the **Done** button to save the changes.

#### Modifying a Contact's E-mail/Web Address

- 1. From the Contact View tab, tap the **E-mail/Web** icon to display the E-mail/Web List tab.
- 2. Tap the e-mail or Web address to be modified in order to open the E-mail/Web Details dialog box.
- 3. Modify the information as necessary and then tap the **Done** button to save the changes.

#### **Deleting a Contact Record**

- 1. From the Contact View tab, tap the Edit button to display the Details tab.
- 2. Tap the **Delete** button to open the Delete Record dialog box.
- 3. Tap the **OK** button to delete the selected record from the palm device and the server. **Note:** Perform a HotSync operation to synchronize the data.

#### **Business Contact Records**

Creating, modifying, and deleting Business Contact Records works the same way as Individual Contact Records. The only difference is that some of the screens display different information more useful for working with businesses.

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Edit 🔻 Client 🛛 🛞 🔂 🖂	Contact View 🛛 🛞 🔂 🖂
Name: ABC Manufacturing	ABC Manufacturing
Contact: Elan A. Horley	
Sub-Type:	JZ 15. Main Street
Source: EZD	Business Details
SUD-SOURCE:	business becans
Revenue:	Employees 250
Income: 100000000	Est. On 05/14/1993 🕶
Тах: 65	Industry 🔻 Manufacturing
	Emp Class   Private Corporation
(Done) (Cancel) (Details) (Delete)	(Done) (Cancel)
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# Calendar

The Calendar views are: DayView, WeekView, MonthView and AgendaView.

#### DayView

From the SmartOffice tab, select **Calendar** to open the DayView calendar. The DayView is used to display the activities for a specific day. The activities of a previous or future day can be displayed by tapping the left or right arrows.

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Options	Sep 22, 05 SMTWTFS				
Contact 🖌 C	8:00				
Calendar 🖌 L	r 9:00 Cunningham, John - deliver				
To Do 🖌 D	information regarding new				
Synchronize 🖌 S	insurance products offered.				
Sync Options 🖌 O	10:00				
Preferences 🖌 F	11:00				
About SmartOffice /T	12:00				
	2.00				
	3:00				
	4:00				
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## WeekView

The WeekView is used to view activities for a specific week. The activities of a previous or future week can be displayed by tapping the left or right arrows.



# **MonthView**

The MonthView is used to display activities for a specific month. The activities of a previous or future month can be displayed by tapping the left or right arrows.



# AgendaView

The AgendaView is used to display a combination of timed and non-timed activities for a specific day. The activities of a previous or future day can be displayed by tapping the left or right arrows.

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Sep	23,	05	►	S	М	Т	W	Т	F	S	
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# Adding an Activity from the Calendar

- 1. From the DayView calendar, tap the **New** button to open the Activity Details tab.
- 2. Enter the activity information and then tap the **Done** button to save the activity.

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Sep 23, 05 🛛 🛞 🔂 🖂
Time 9:00 amDur. 60 ▼ Minutes
Contact) Cunningham, John
(Participant) 🔻 Daniel
Place Subject
🗢 Appointment 🛛 🗢 Approach/New
(Reason) deliver information
regarding new insurance
Done Private Tracked
☐ Hlarm
Done Go to Cancel Delete
· · · · · · · · · · · · · · · · · · ·
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#### **Activity Components**

- Time: Tap the Time button to specify the Start and End Time of an activity.
- **Contact**: Tap the **Contact** button to link a contact to the activity.
- **Location**: Enter the Location for the activity.
- **Type**: Tap the **Type** drop-down arrow to display the activity type list.
- **Reason**: Enter the Reason for the activity. If the reason takes up more than the space provided, tap the **Reason** button to open the Details tab and display the complete entry.
- **Done**: Tap the **Done** button to save the activity.
- **Private**: Select this option to designate the activity as private.
- Tracked: Select the Tracked option to enter an Appointment into the Activity Tracking cycle.
- Alarm: Select the Alarm option and then specify the amount of time to be reminded prior to the activity.
- **Priority**: Tap the **Priority Type** drop-down arrow to specify the priority.

## Modifying an Activity from the Calendar

- 1. From the SmartOffice tab, select **Calendar** from the drop-down list to open the DayView calendar.
- 2. Tap the applicable activity to open the Activity Details tab.
- 3. Modify the information as necessary and then tap the **Done** button to save the changes.

# Deleting an Activity from the Calendar

- 1. From the SmartOffice tab, select **Calendar** from the drop-down list to open the DayView calendar.
- 2. Tap the applicable activity to open the Activity Details tab.
- 3. Tap the **Delete** button to display the confirmation dialog box.
- 4. Tap the **OK** button to delete the activity.



## To Do

From the SmartOffice tab, select **To Do** from the drop-down list to open the non-timed activities list.



# Adding a To Do Item

- 1. From the SmartOffice tab, select **To Do** from the drop-down list to open the non-timed activities list.
- 2. Tap the **New** button to open the Activity Details tab.
- 3. Enter the non-timed activity information and then tap the **Done** button to save the activity.

#### Modifying a To Do Item

- 1. From the SmartOffice tab, select To Do from the drop-down list to open the non-timed activities list.
- 2. Tap the applicable To Do item to open the Activity Details tab.
- 3. Make the modifications as necessary and then tap the **Done** button to save the changes.

## Deleting a To Do Item

- 1. From the SmartOffice tab, select **To Do** from the drop-down list to open the non-timed activities list.
- 2. Tap the applicable To Do item to open the Activity Details tab.
- 3. Tap **Delete** to display the confirmation dialog box.
- 4. Tap the **OK** button to delete the To Do item.



# Synchronize

The Synchronize menu item only applies to wireless enabled devices and will initiate a wireless synchronization with SmartOffice.

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Options		
Contact	<b>/</b> C	
Calendar	<u></u>	
	<b>/</b> U	
Synchronize	∕s	
Sync Options	<u>~</u>	
Preterences		
About SmartOffice	<b>/</b> T	
TUF Faill US	•	
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#### Preferences

The Preferences tab in SmartOffice Mobile contains additional preferences that can be used to tailor the application for specific needs.



# Landing Zone

The Landing Zone allows users to specify the location that will display each time the SmartOffice Mobile application is opened:

- Home: The main SmartOffice Mobile screen displays each time the application is opened.
- Contact List: The Contact List screen displays each time the application is opened.
- Agenda View: The Agenda View screen displays each time the application is opened.

The landing zone makes it easier to program the buttons on Palm devices to quickly access the area of the application that is used the most. For example, if the landing zone is set to the Contact List and the Address button on the Palm device is set to open SmartOffice Mobile, each time the Address button is selected, the Contact List in SmartOffice Mobile will display.

#### Mail Adaptor E-mail

The Mail Adaptor E-mail section on the Preferences tab is used to specify the e-mail address used in conjunction with E-Z Data's SmartOffice Mail Adaptor. This section only applies if the Mail Adaptor module is being used.

#### **Enable Phone View**

The Enable Phone View option is used to change the appearance of the Contact List to work better with Palm powered phone devices such as the Treo. With the phone view enabled, all phone numbers for each contact will display (preferred number will display in bold) and can be dialed by selecting the appropriate phone number.

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Contacts	
Abernathy, Brad	ł
	(626) 522-1160M
Able, Christian	
(909)	8/5-/222#26541B
Aco Duilding	(909) 562-4895 R
nce bulluling,	(626) 987-7288B
	(626) 987-2888 B
Ackerman. Josei	oh
	(626) 799-2951R
(	310) 309-0948#152 B
Find :	(Done ) (New ) 📥
ad	.23
	<u>~</u>
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## **Contact Menu**

From the Contact View, tap the Contact View tab to display the modules drop-down list.

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Modules							
Activity Log /A SmartPad /S Policies /P Investments /I Form Letters /L Letter Queue /T te 250 Los Angeles, CA 90007							
(626) 799-2951 🛛 🛞							
JAckerman@bobbisnet.com							
Done Edit Details							
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## **Activity Log**

The Activity Log is a list of the activities linked to a particular contact.

## Adding a Timed Activity from the Activity Log

- 1. From the Contact View, tap the Contact View tab to display the modules drop-down list.
- 2. Tap Activity Log to open the ActLog tab.
- 3. Tap the **New** button to open the Activity Details tab.
- 4. Enter the activity information and then tap the **Done** button to save the activity.



#### Adding a Non-timed Activity from the Activity Log

- 1. From the Contact View, tap the **Contact View** tab to display the modules drop-down list.
- 2. Tap **Activity Log** to open the ActLog tab.
- 3. Tap the **New** button to open the Activity Details tab.
- 4. Enter the activity information without entering a time and then tap the **Done** button to save the activity.

#### SmartPad

SmartOffice Mobile can be used to view, add, and delete SmartPad records that are synchronized with the SmartOffice database. Only those SmartPad entries that are added with SmartOffice Mobile for Palm and have not synchronized with SmartOffice can be modified.

## Adding a SmartPad Note

1. From the Contact View tab, tap **Contact View** and then select **SmartPad** from the drop-down list of modules to display the SmartPad tab.



2. Tap the **New** button to display the Details tab. Enter the SmartPad note and then tap the **Done** button to save the additions.



# Deleting a SmartPad Note

- 1. From the Contact View tab, tap **Contact View** and then select **SmartPad** from the drop-down list of modules to display the SmartPad tab.
- 2. Tap the SmartPad note for deletion to open the Details tab.
- 3. Tap the **Delete** button to open the Delete Record dialog box.
- 4. Tap the **OK** button to delete the selected record from the palm device and the server.

#### Policies

SmartOffice Mobile can be used to display **Policies**, **Policy Details**, **Interested Parties** and **Totals** on the PDA.

Note: Policy information is read-only and cannot be added, modified or deleted in SmartOffice Mobile.

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Policies Joseph Ackerman			Policy Details		Interested Parties	
Plan Total Coverage Home Insurance Safe Driver Plan Business Owner' CAT Preferred Life American Level	<b>A. Prem</b> 1,412 587 1,700 240 450 <b>1,800</b> 9,600	Benefit 449,999 0 0 0 0 185,000 850,000	Plan Name Carrier Policy # PolicyType PolicyDate Status Mode/Prem Basic Face	Preferred Life 20th Century Life S823490 Life Submitted Monthly 150.00 100,000.00	Primary Contact Ackerman, Joseph Primary Advisor Philip Anderson Primary Insured Joseph Ackerman Joseph Ackerman	
Done (Totals)	l		NetDB Cash Value Done IntPrty	185,000.00	Joseph Ackerman	
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#### **Accessing Policy Information**

- 1. From the Contact View tab, tap **Contact View** and then select **Policies** from the drop-down list of modules to display the Policies tab.
- 2. Tap the policy to display the Policy Details tab.
- 3. Tap the IntPrty icon to display the Interested Parties tab.
- 4. Tap the **Done** button and then tap the **Done** button again to return to the Policies tab.
- 5. Tap the **Totals** icon to display the Totals tab.

#### Investments

SmartOffice Mobile can be used to display **Investments**, **Investment Details** and **Investment Totals** on the PDA.

**Note**: Investment information is read-only and cannot be added, modified or deleted in SmartOffice Mobile.

#### **Accessing Investment Information**

- 1. From the Contact View tab, tap **Contact View** and then select **Investments** from the drop-down list of modules to display the Investments tab.
- 2. Tap the investment to display the Investment Details tab.
- 3. Tap the **Done** button and then tap the **Totals** button to display the Investment Totals tab.

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Investments Joseph Ackerman		Investment	Details		Investment To	tals
Investment Name	Value	SecurityType		Stocks	Cost :	1,618,975
United States Treasury Bill	85,396	Invest Name	Amgen	Corporation	Tax Basis :	480,450
Morgan Stanley U.S. Govt S	10,386	Account #	0	0234567956	Value :	2,147,660
American Century High Yiel	62,321	Purchase Cost		54,000.00		
Amgen Corporation	48,926	Tax Cost		54,000.00		
Cash	60.000	Shares/Date	794.12	07/22/02		
AT&T	43,695	Price/Date	62.00	02/28/05		
Federal Natl Mtg Assn Mtn	80,144	Current Value		48,926.00		
American Century High Yiel	31,542			-		
AIM Growth Fund	76,493					
Done (Totals)	-	Done			Done	
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#### **Form Letters**

SmartOffice Mobile enables users to initiate the sending of a form letter to the selected contact.

1. From the Contact View screen, tap the Contact View menu and then select Form Letters.



- 2. From the list of form letters that displays, tap on the letter to be sent to the contact and then tap the **Done** button.
- 3. A confirmation dialog will display, confirming that the letter will be saved to the SmartOffice Printer Queue during synchronization.

#### Letter Queue

The Letter Queue displays a list of form letters selected using SmartOffice Mobile to be sent to a contact. The list displayed in the Letter Queue will be added to the SmartOffice Printer Queue during the next synchronization. If a selected form letter no longer needs to be sent to the contact, then it can be deleted from the Letter Queue by selecting the letter and tapping the **Delete** button.