

SmartOffice Mobile for Palm  
User Guide

# SmartOffice®



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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

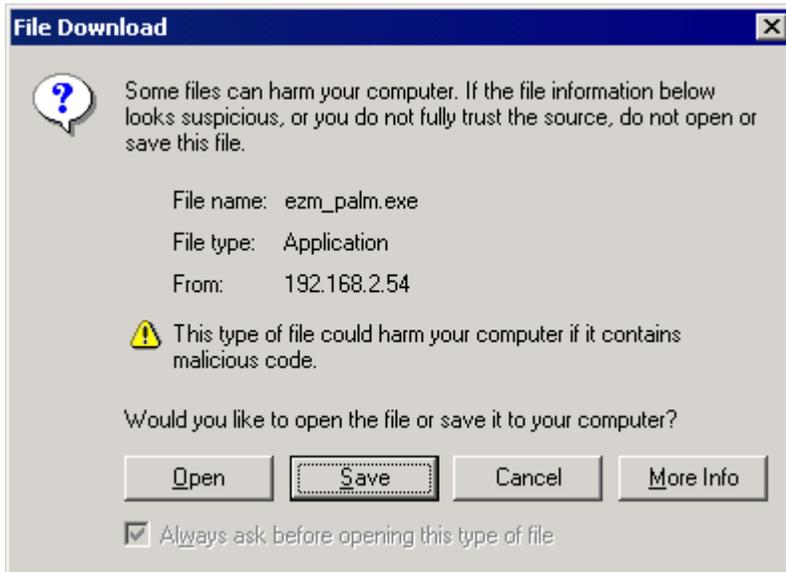
1. Log into SmartOffice.
2. From the side menu, click **User Setup** and **Installations** to open the Installations spreadsheet.



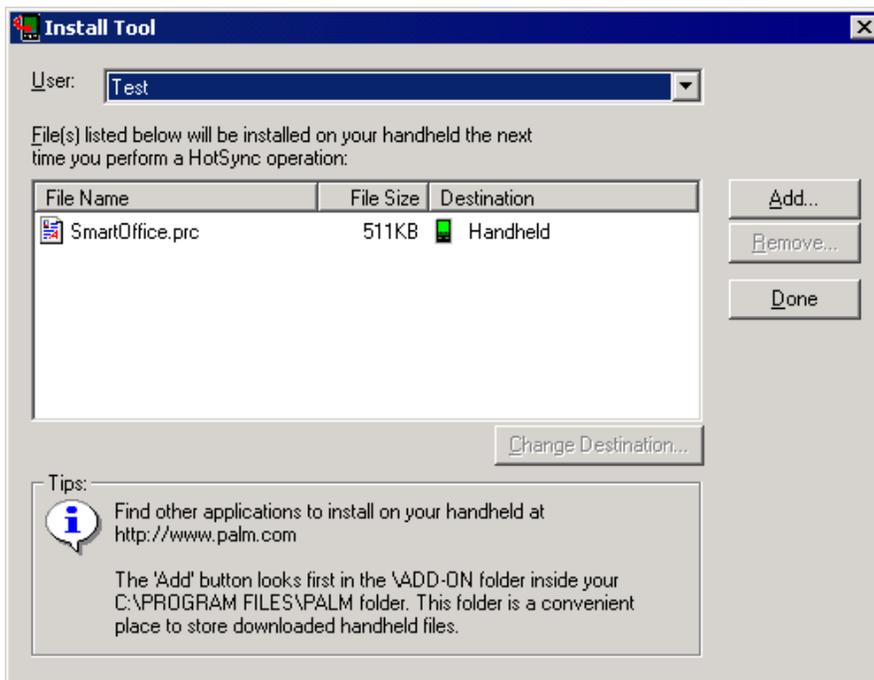
3. The Installations spreadsheet displays all the available installations. From this spreadsheet, click the **SmartOffice Mobile for Palm and Pocket PC** link.
4. Select the **Click here to download and install SmartOffice Mobile for Palm** option to begin the installation file download.



- 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.



- 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.



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



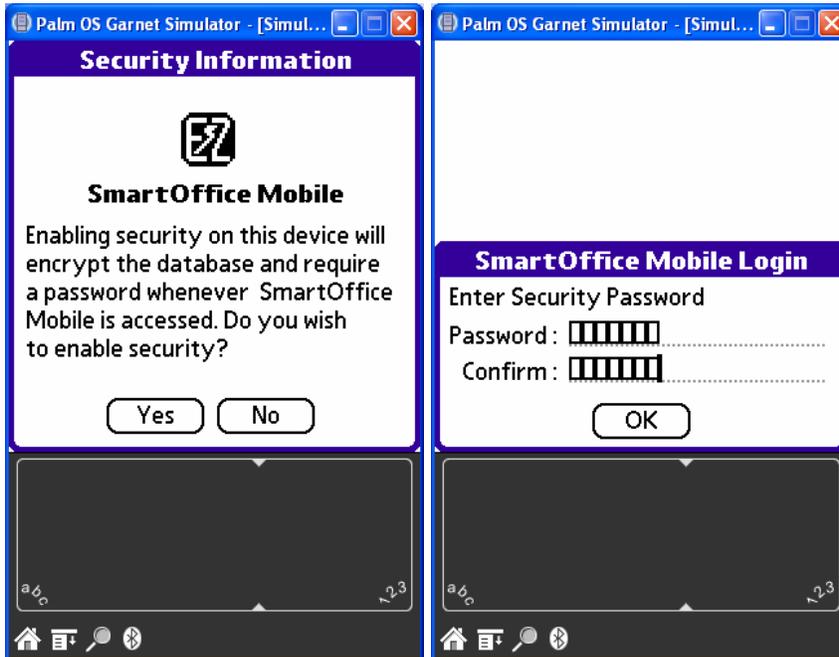
## Setting Up SmartOffice Mobile for Palm

### Accessing SmartOffice Mobile on the Palm OS Device

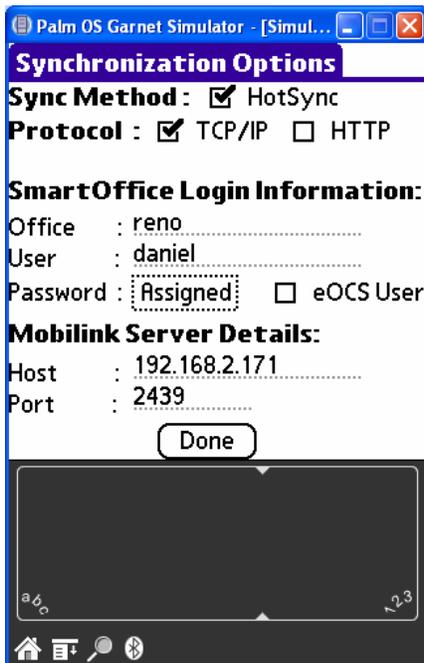
To start SmartOffice Mobile, tap the **SmartOffice** icon.



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.



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.



**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.

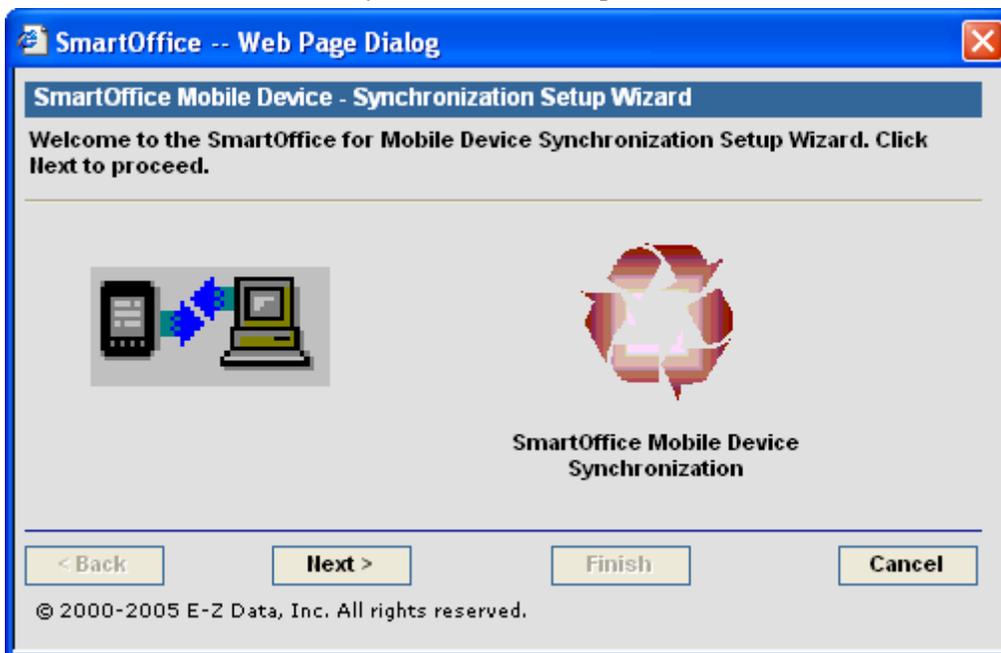
Once the correct information has been entered on the Synchronization Options window, tap the **Done** button to save the information.

## Setting Up SmartOffice Mobile Synchronization Criteria

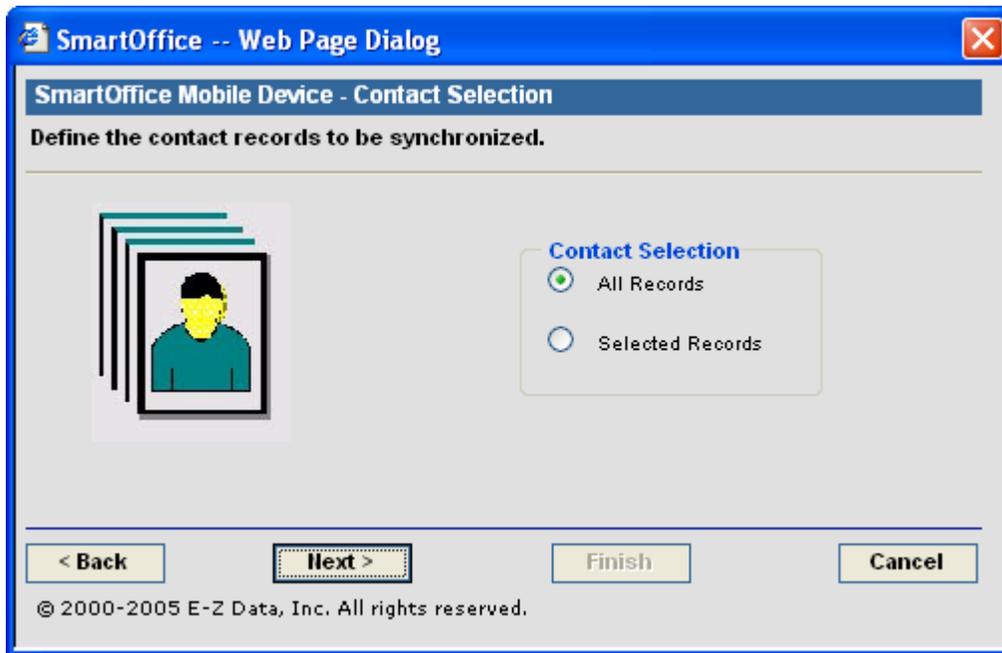
1. From the side menu, click **Synchronization** and then select **Mobile Device Setup** to open the Synchronization Setup Wizard.



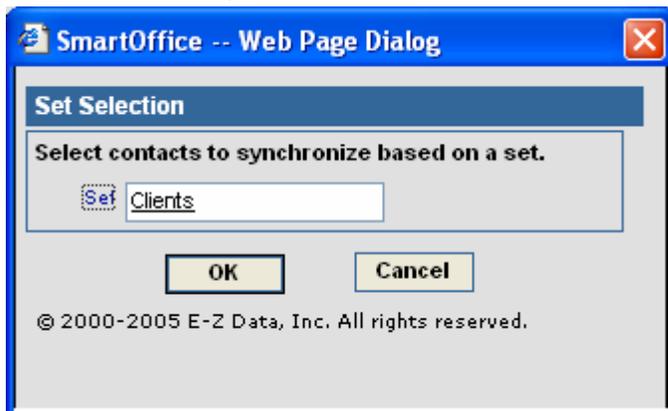
2. From the first window of the Synchronization Setup Wizard, click the **Next** button.



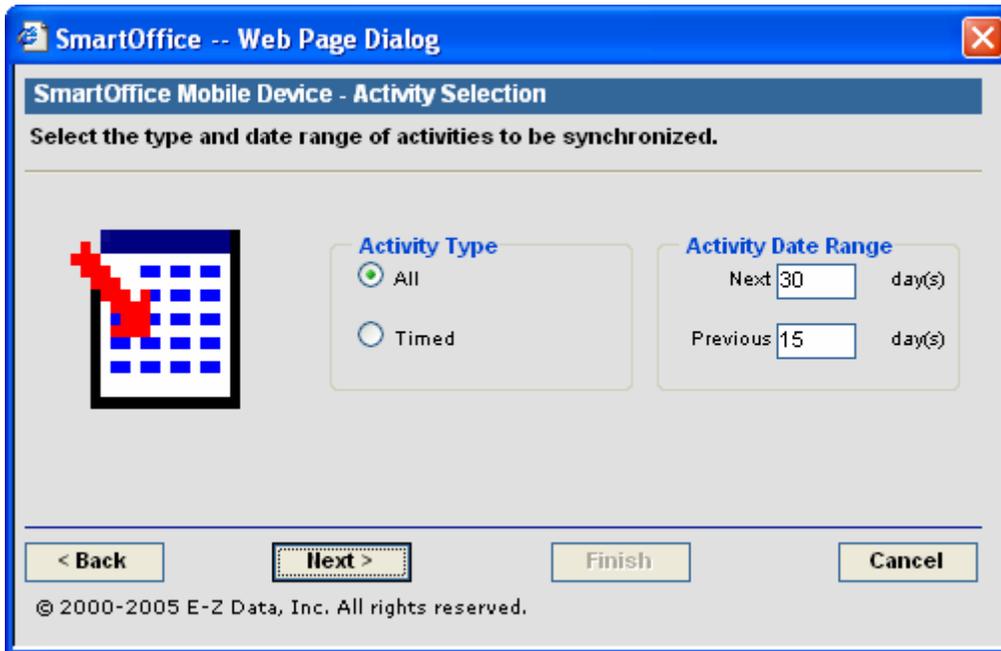
3. Choose to synchronize all contacts or selected contacts and then click the **Next** button.



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

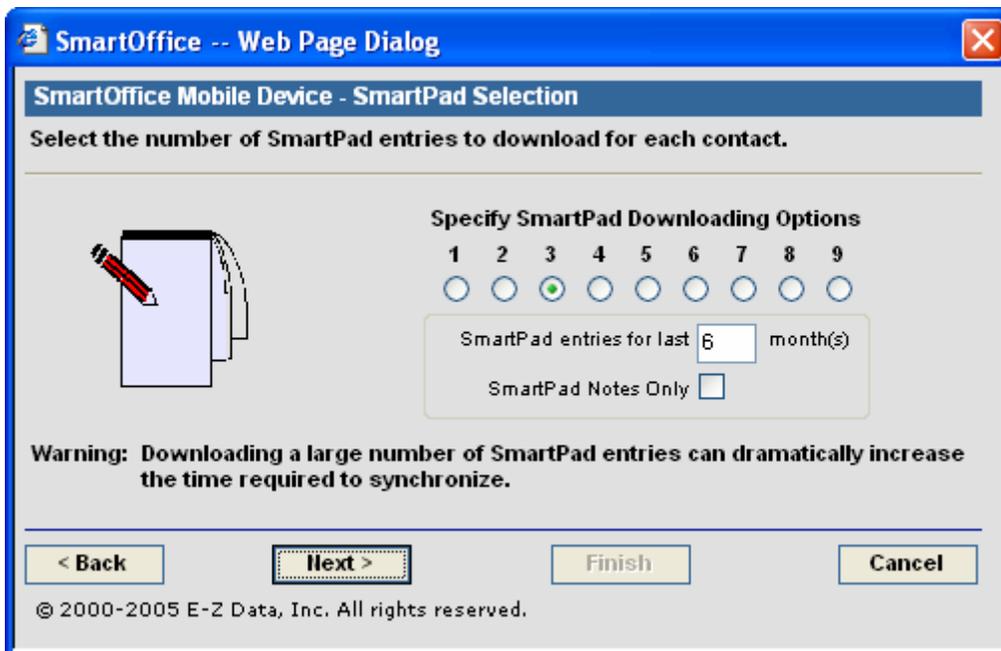


4. Select a date range of future and past activities for synchronization. Click the **Next** button to continue.



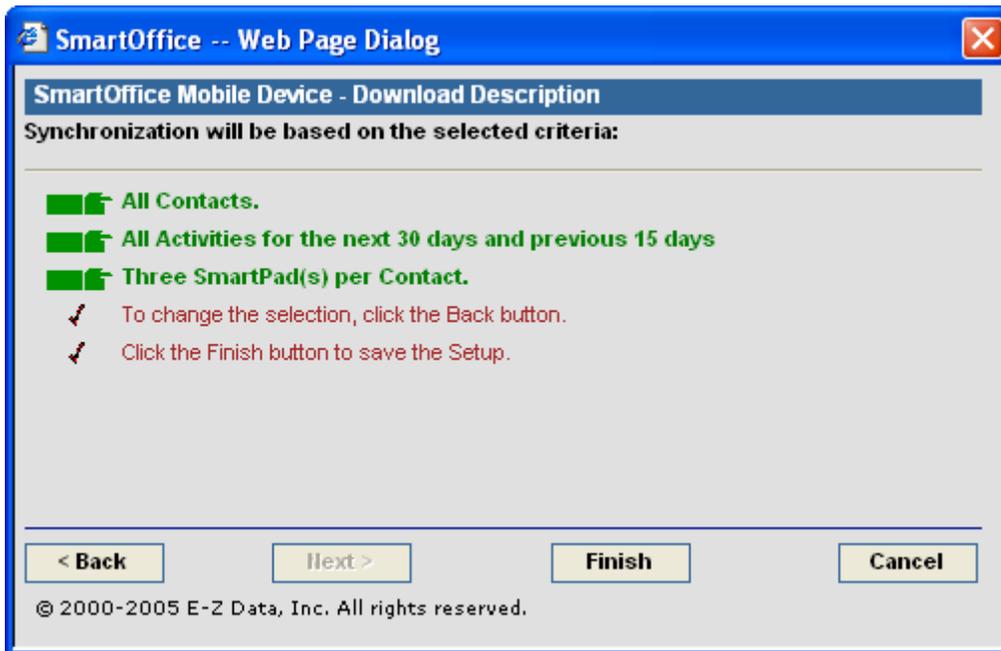
The dialog box is titled "SmartOffice Mobile Device - Activity Selection" and contains the instruction "Select the type and date range of activities to be synchronized." It features a calendar icon with a red arrow pointing to a date. Under "Activity Type", the "All" radio button is selected. Under "Activity Date Range", the "Next" field is set to 30 and the "Previous" field is set to 15, both in "day(s)". Navigation buttons include "< Back", "Next >", "Finish", and "Cancel". A copyright notice at the bottom reads "© 2000-2005 E-Z Data, Inc. All rights reserved."

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.



The dialog box is titled "SmartOffice Mobile Device - SmartPad Selection" and contains the instruction "Select the number of SmartPad entries to download for each contact." It features a notepad icon. Under "Specify SmartPad Downloading Options", radio buttons 1 through 9 are shown, with radio button 3 selected. Below this, a field shows "SmartPad entries for last 6 month(s)" and a checkbox for "SmartPad Notes Only" is unchecked. A warning message states: "Warning: Downloading a large number of SmartPad entries can dramatically increase the time required to synchronize." Navigation buttons include "< Back", "Next >", "Finish", and "Cancel". A copyright notice at the bottom reads "© 2000-2005 E-Z Data, Inc. All rights reserved."

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.



## Preparing Data for Synchronization

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

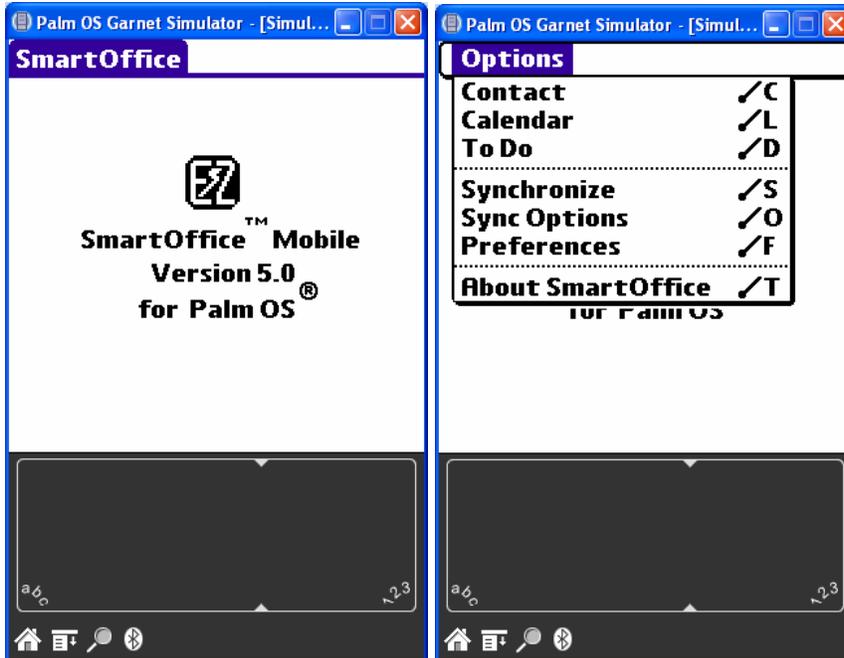
1. From the SmartOffice side menu, click **Synchronization** and then select **Update Mobile Device** to open the Update Mobile Device with Changes dialog box.
2. Select the **Perform a full refresh of the data from SmartOffice** option to prepare data that meets the setup criteria for synchronization.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

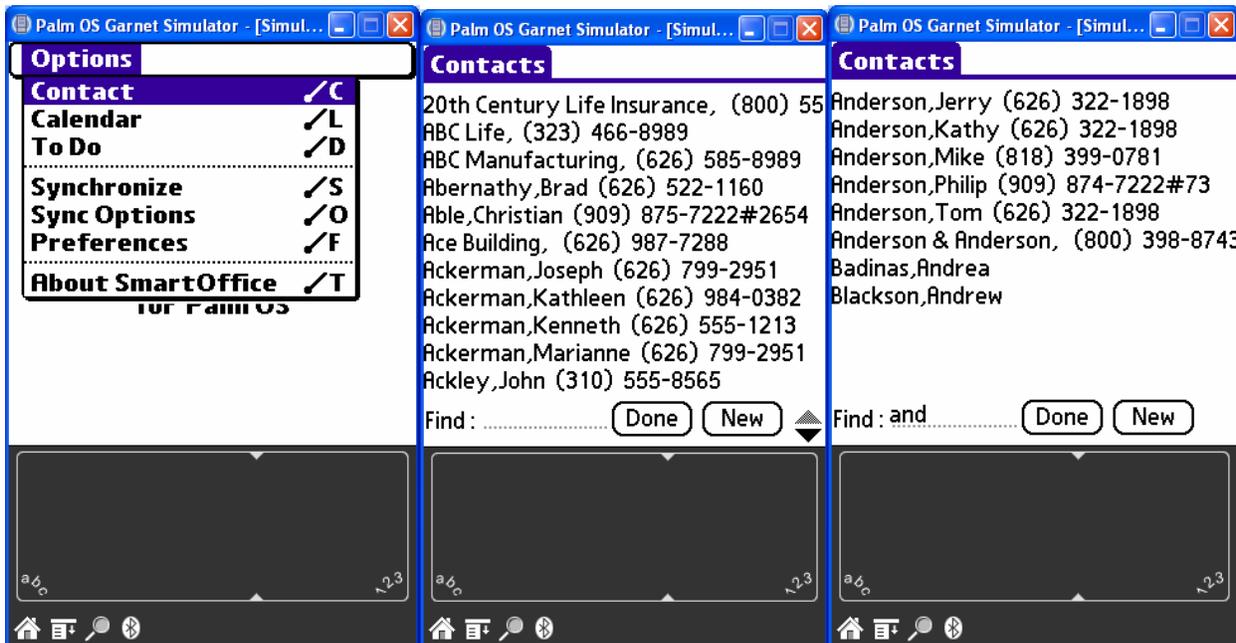
## SmartOffice Tab

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



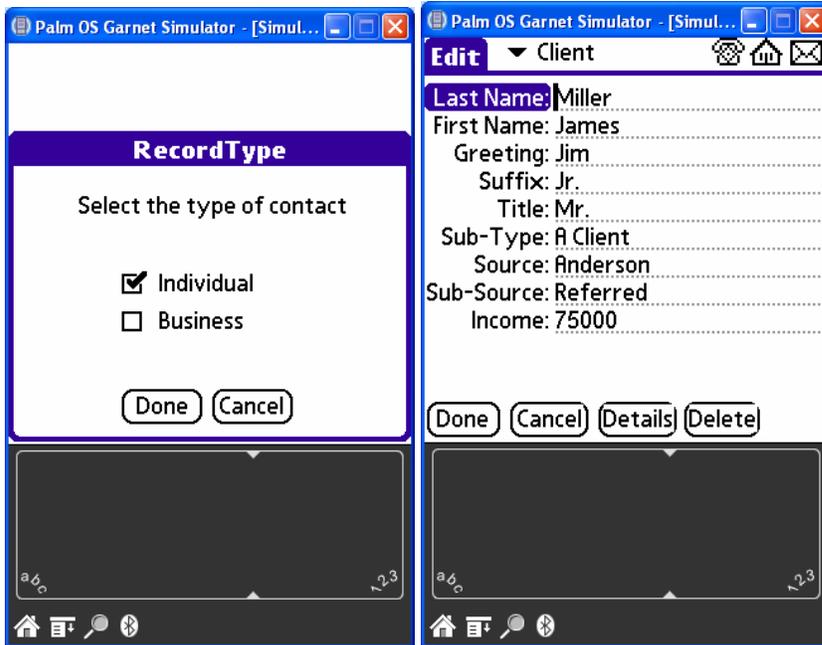
## Contact Tab

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:

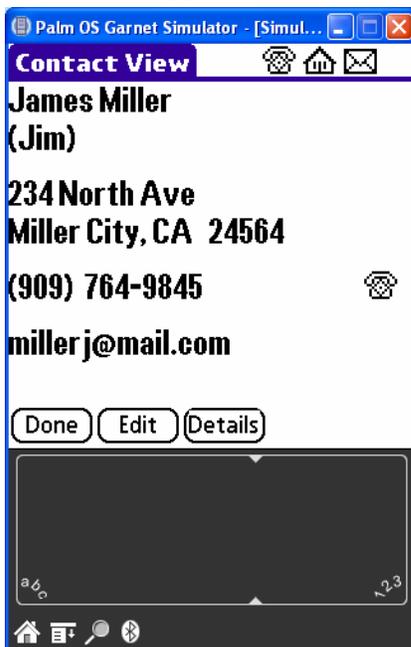


## Creating an Individual Contact Record

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.



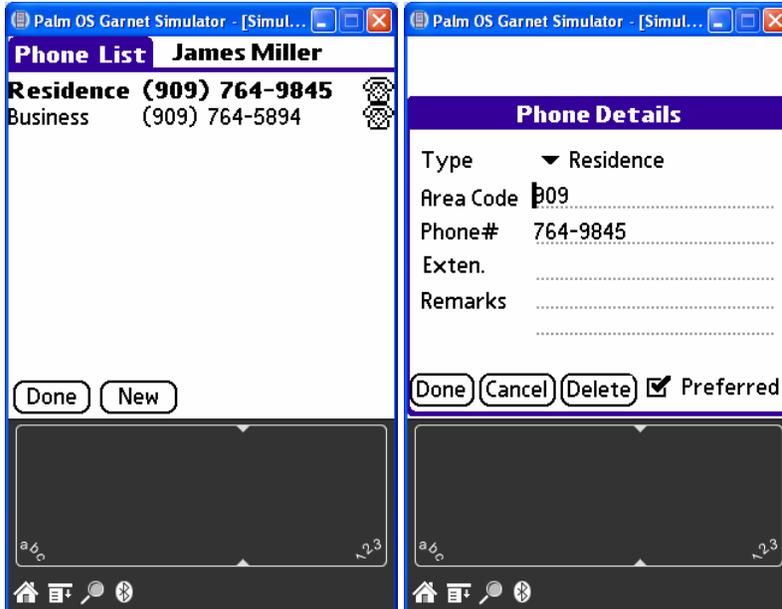
4. Enter the contact information and then tap the **Phone**, **Address**, and **E-mail/Web** buttons to enter the corresponding information. Additional information can be added by tapping the **Details** button.
5. Tap the **Done** button to save the information and display the Contact View tab.  
**Note:** 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.



3. Tap the **Type** drop-down arrow to specify the phone type.
  4. 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

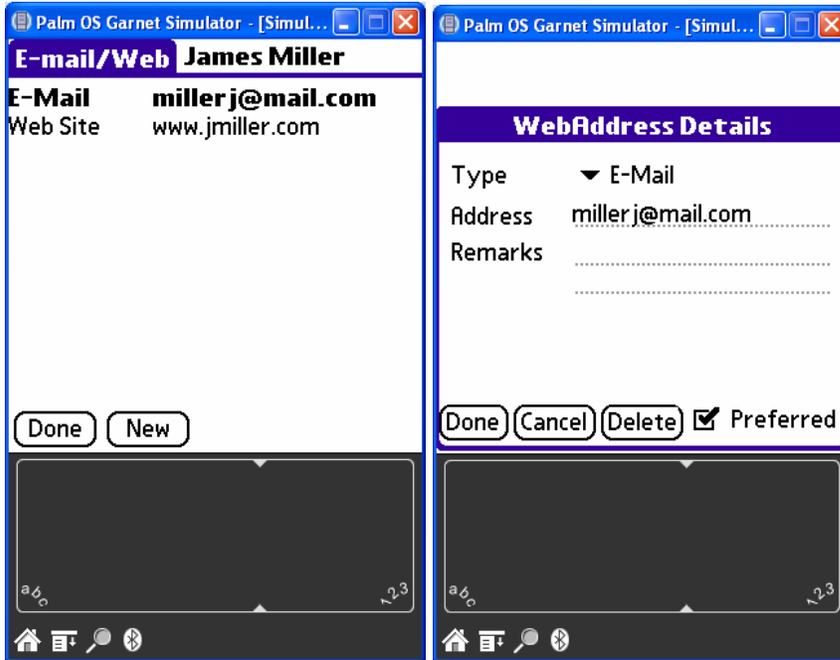
1. From the Contact View tab, tap the **Address** icon to display the Address List tab.
2. Tap the **New** button to open the Address Details dialog box.



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

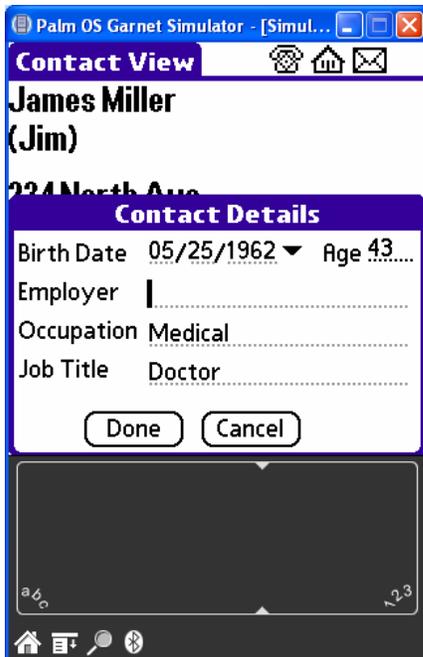
1. From the Contact View tab, tap the **E-mail/Web** icon to display the E-mail/Web List tab.
2. Tap the **New** button to open the Web Address Details dialog box.



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.



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.

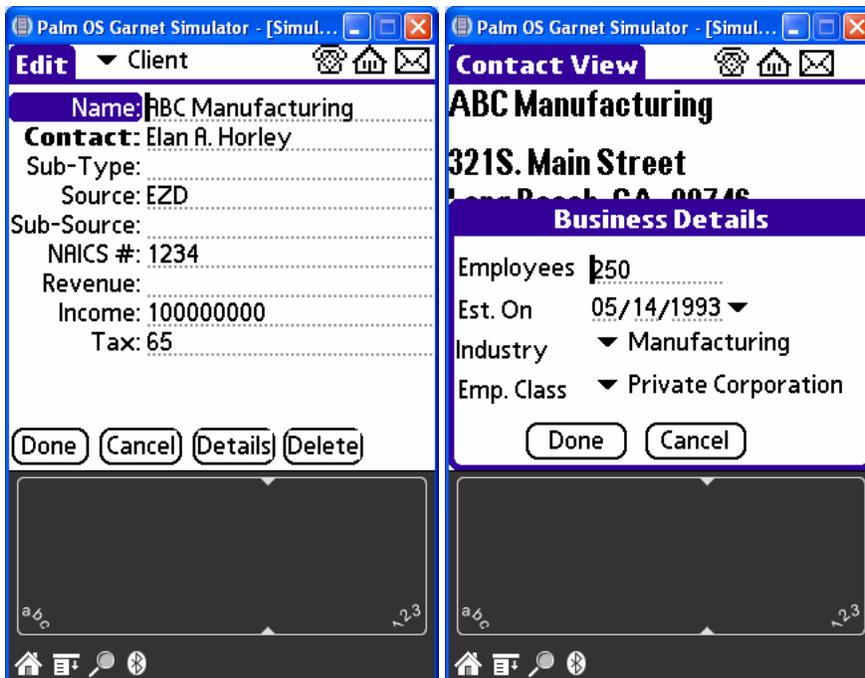
### Deleting a Contact Record

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.

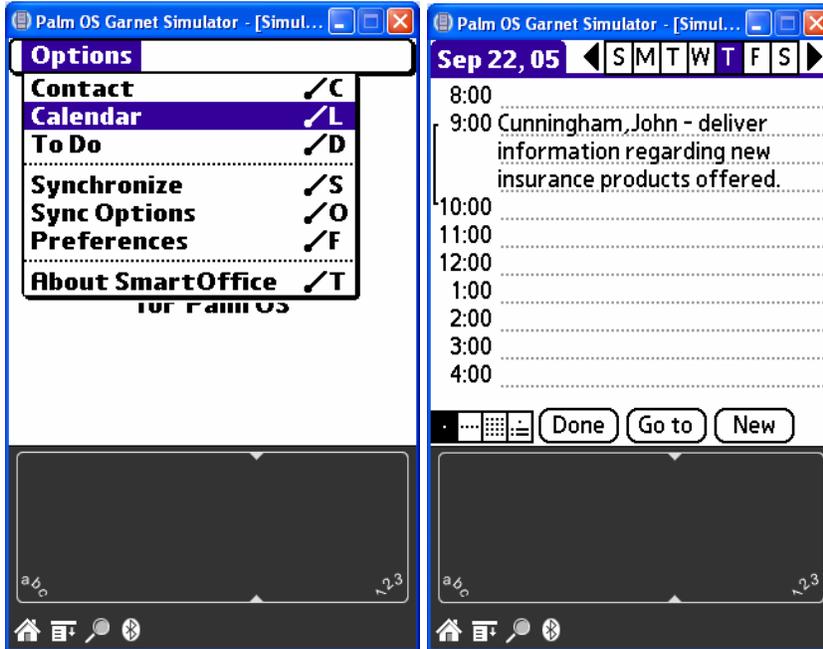


## Calendar

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

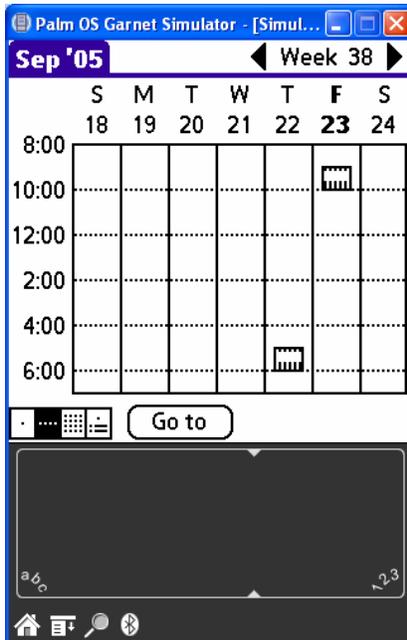
### DayView

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.



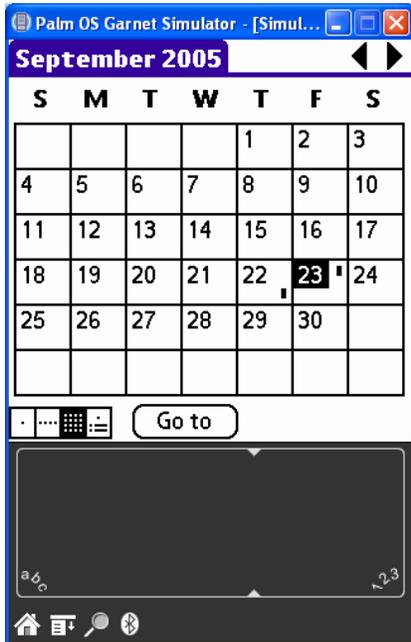
### WeekView

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.



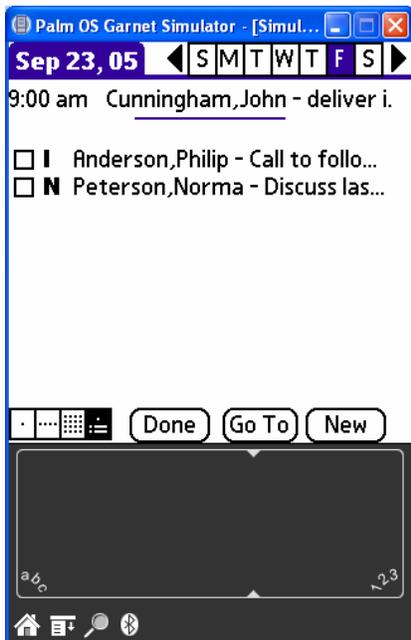
## MonthView

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.



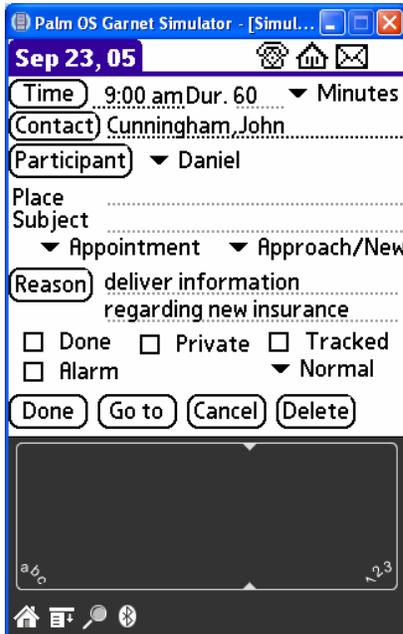
## AgendaView

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.



## 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.



## Activity Components

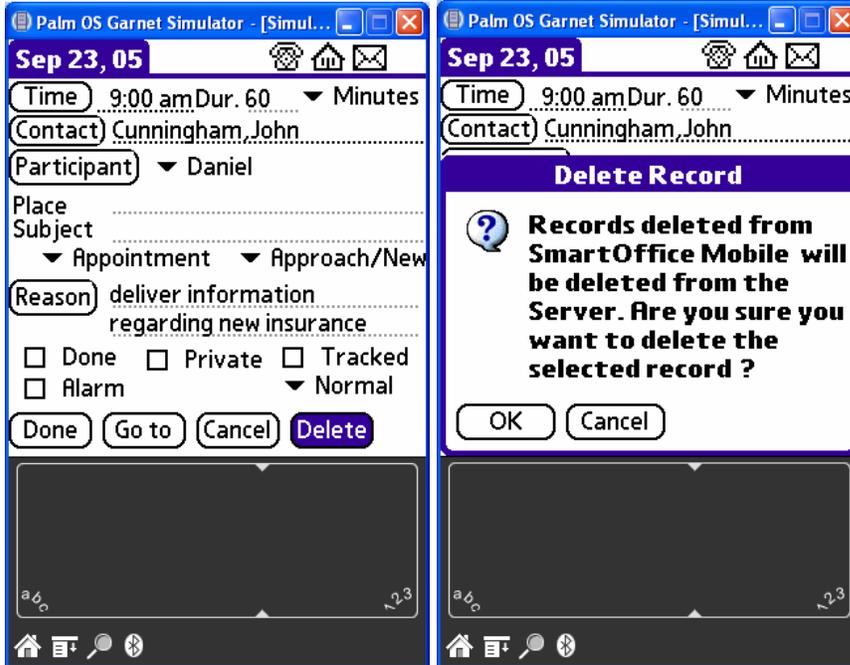
- **Time:** Tap the **Time** button to specify the Start and End Time of an activity.
- **Contact:** Tap the **Contact** button to link a contact to the activity.
- **Location:** Enter the Location for the activity.
- **Type:** Tap the **Type** drop-down arrow to display the activity type list.
- **Reason:** 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.

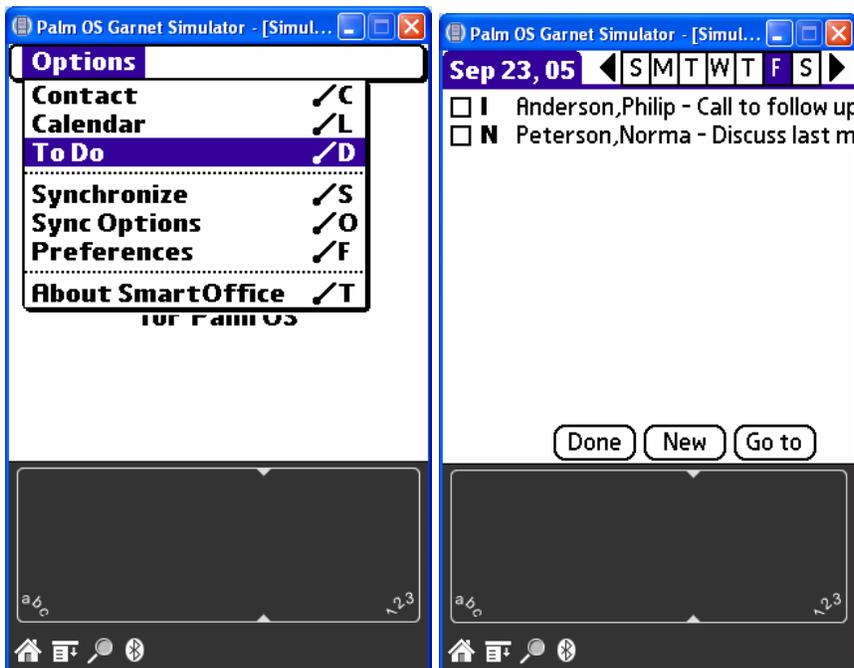
## Deleting an Activity from the Calendar

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

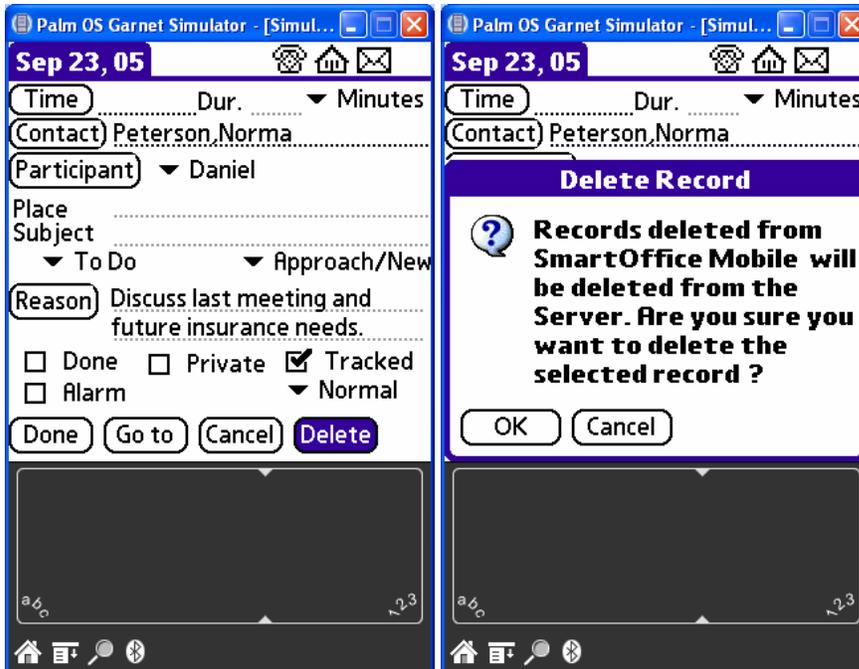
1. From the SmartOffice tab, select **To Do** from the drop-down list to open the non-timed activities list.
2. Tap the **New** button to open the Activity Details tab.
3. Enter the non-timed activity information and then tap the **Done** button to save the activity.

## 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.

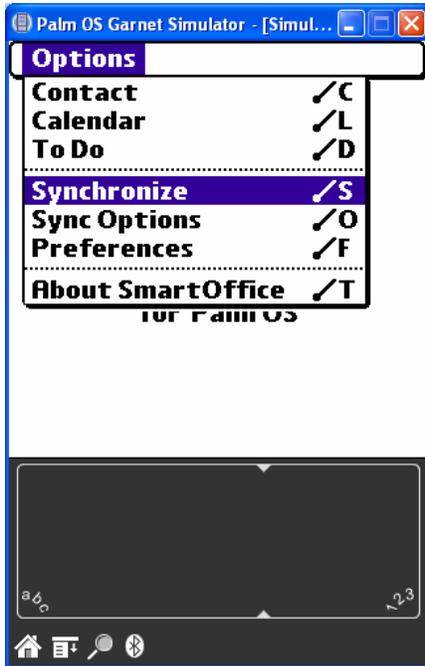
## Deleting a To Do Item

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.



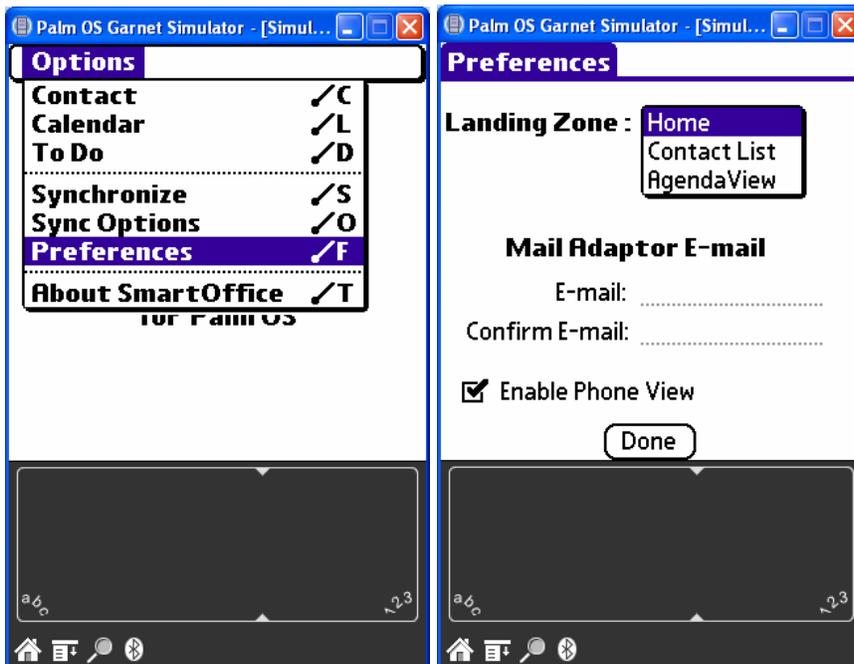
## Synchronize

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



## 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.

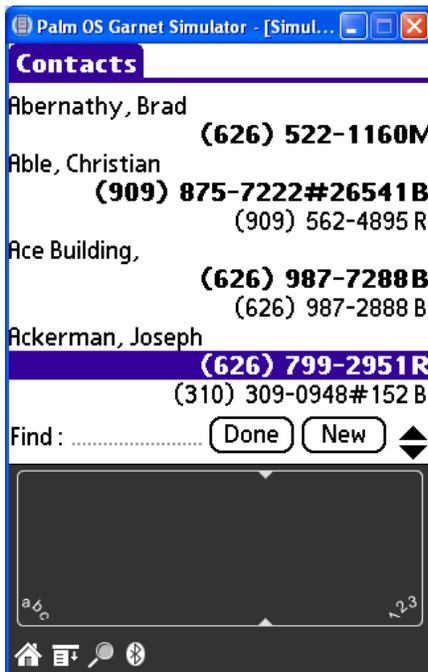
The landing zone makes it easier to program the buttons on Palm devices to quickly access the area of the application that is used the most. For example, if the landing zone is set to the Contact List and the Address button on the Palm device is set to open SmartOffice Mobile, each time the Address button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

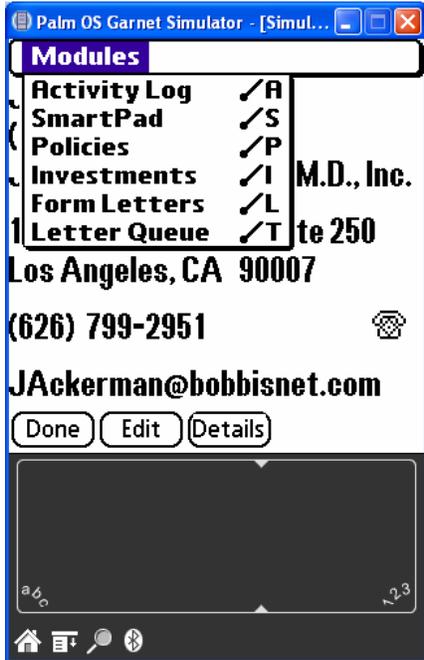
## Enable Phone View

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.



## Contact Menu

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

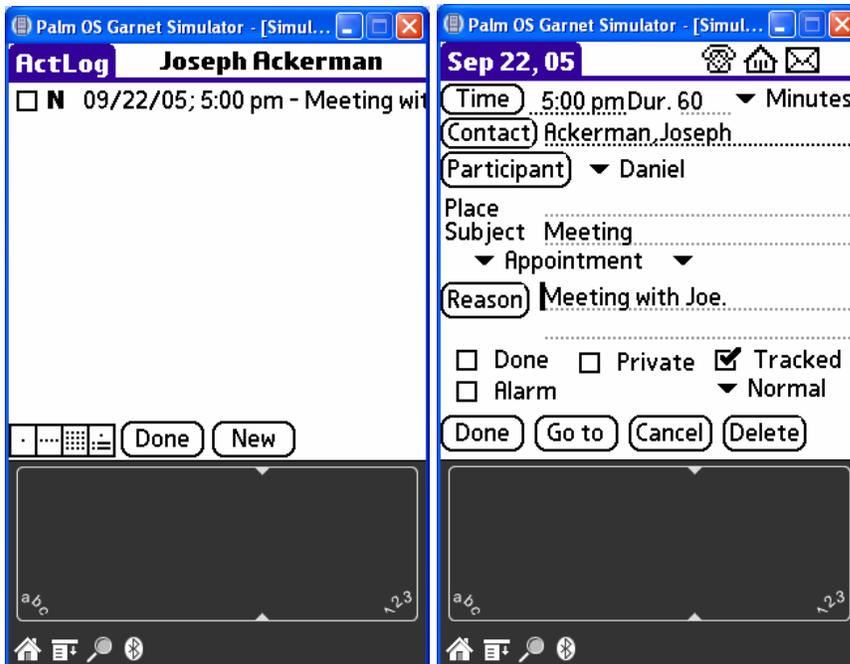


## Activity Log

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

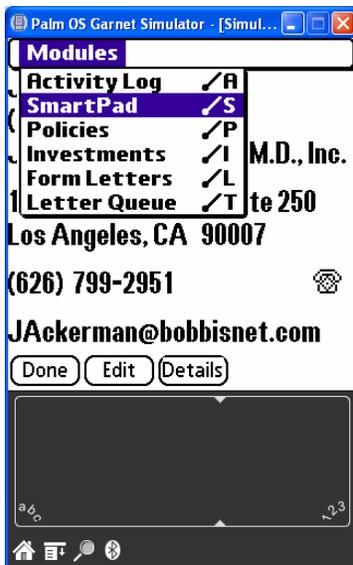
1. From the Contact View, tap the **Contact View** tab to display the modules drop-down list.
2. Tap **Activity Log** to open the ActLog tab.
3. Tap the **New** button to open the Activity Details tab.
4. Enter the activity information without entering a time and then tap the **Done** button to save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

## SmartPad

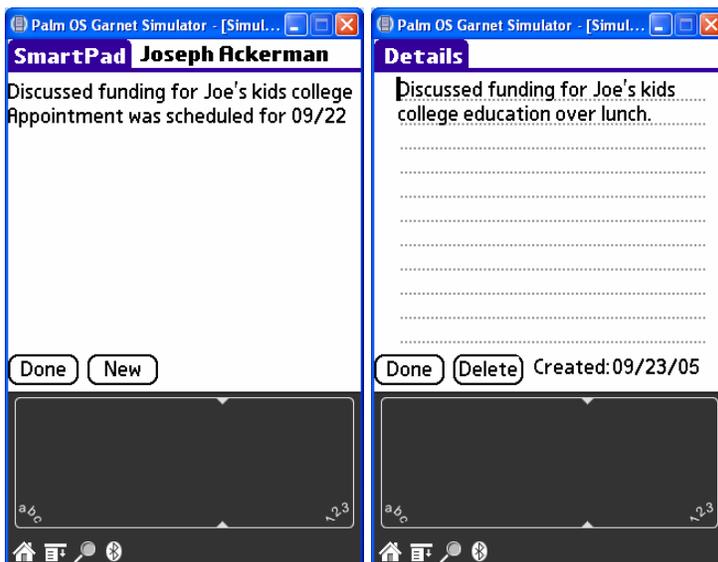
SmartOffice Mobile can be used to view, add, and delete SmartPad records that are synchronized with the SmartOffice database. Only those SmartPad entries that are added with SmartOffice Mobile for Palm and have not synchronized with SmartOffice can be modified.

## 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.



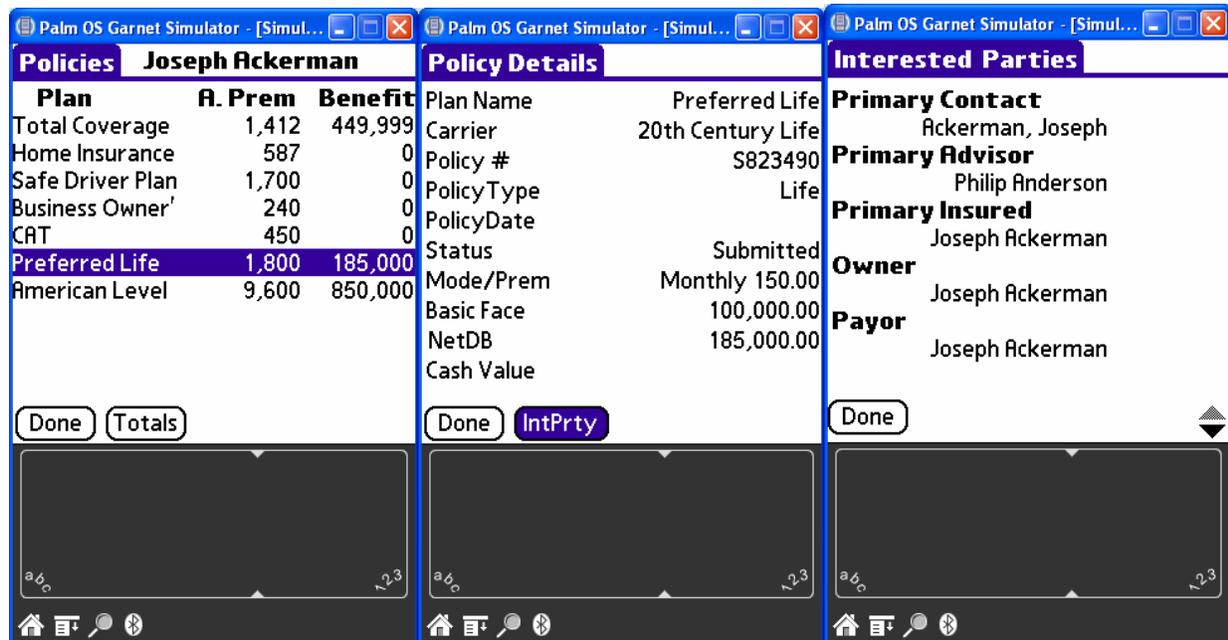
## Deleting a SmartPad Note

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.



## 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.

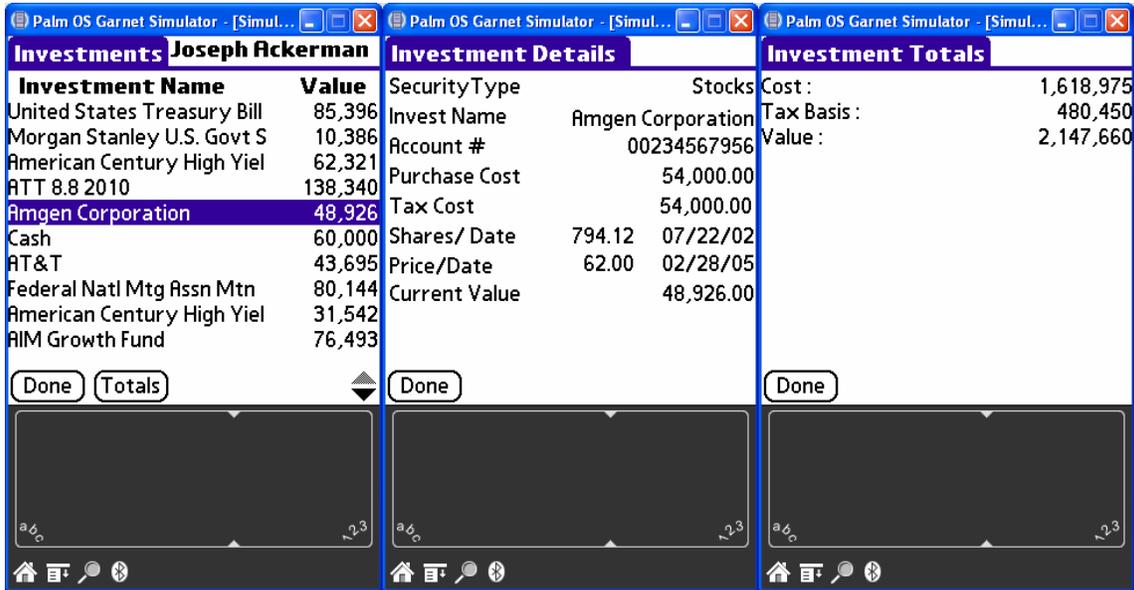
## Investments

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

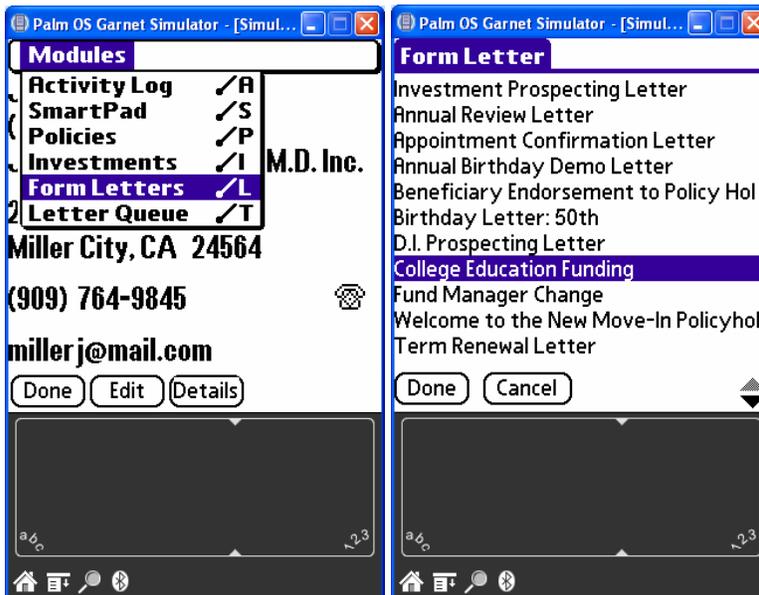
1. From the Contact View tab, tap **Contact View** and then select **Investments** from the drop-down list of modules to display the Investments tab.
2. Tap the investment to display the Investment Details tab.
3. Tap the **Done** button and then tap the **Totals** button to display the Investment Totals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



## 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.