

The logo features a dark grey, curved vertical bar on the left side. To its right, the word "SmartOffice" is written vertically. "Smart" is in a bold, black, sans-serif font, while "Office" is in a white, outlined, sans-serif font. A registered trademark symbol (®) is positioned at the top right of the "Office" portion.

SmartOffice[®]



SmartOffice Mobile for Pocket PC User Guide

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918 E. Green Street
Pasadena, CA 91106

Web: <http://www.ez-data.com>

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123

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Introduction

E-Z Data Inc.'s SmartOffice Mobile for Pocket PC® is a robust application developed for devices running Microsoft's Pocket PC® operating system. Using iAnywhere Solutions' Ultralite database with MobiLink Server, SmartOffice Mobile for Pocket PC® is used to seamlessly synchronize SmartOffice data with Pocket PC® devices.

The following record types can be synchronized using SmartOffice Mobile for Pocket PC®:

- Contact – Individual
- Contact – Business
- Calendar
- SmartPad
- Policies
- Investment

Installing SmartOffice Mobile for Pocket PC®

1. From the side menu, click **User Setup** and select **Installations** to open the Installations spreadsheet.

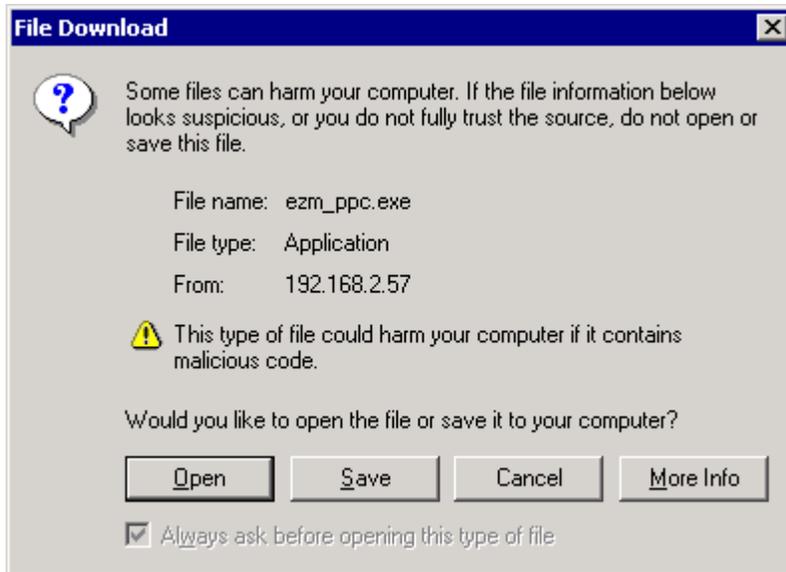


The **Installations** spreadsheet displays all available installation options. From this spreadsheet, click the **SmartOffice Mobile for Palm and Pocket PC** link to open the Install SmartOffice for Mobile devices dialog box.

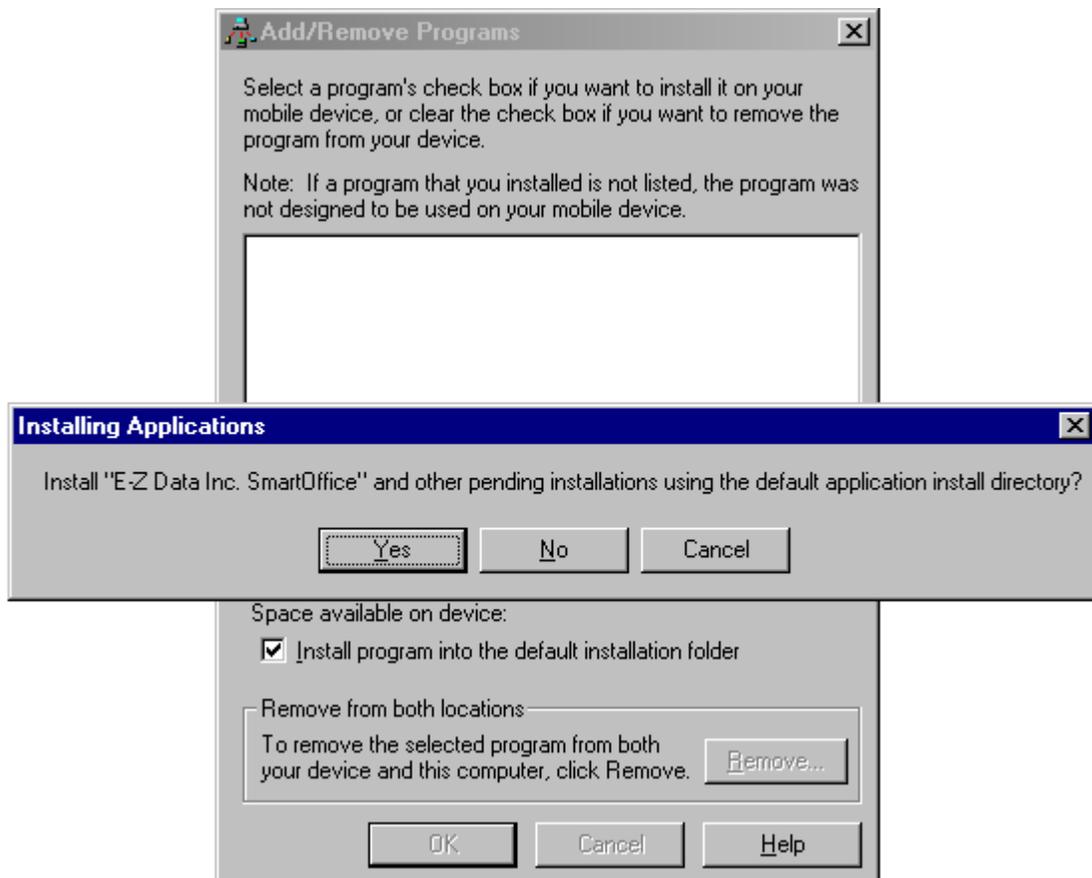
2. Select the **Click here to download and install SmartOffice Mobile for Pocket PC** option to begin the installation file download.



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



4. Click the **Yes** button to install the SmartOffice application using the default application install directory. The progress bar shows the application being installed.



5. Once the progress bar is complete, click the **OK** button from the **Application Downloading Complete** dialog box.

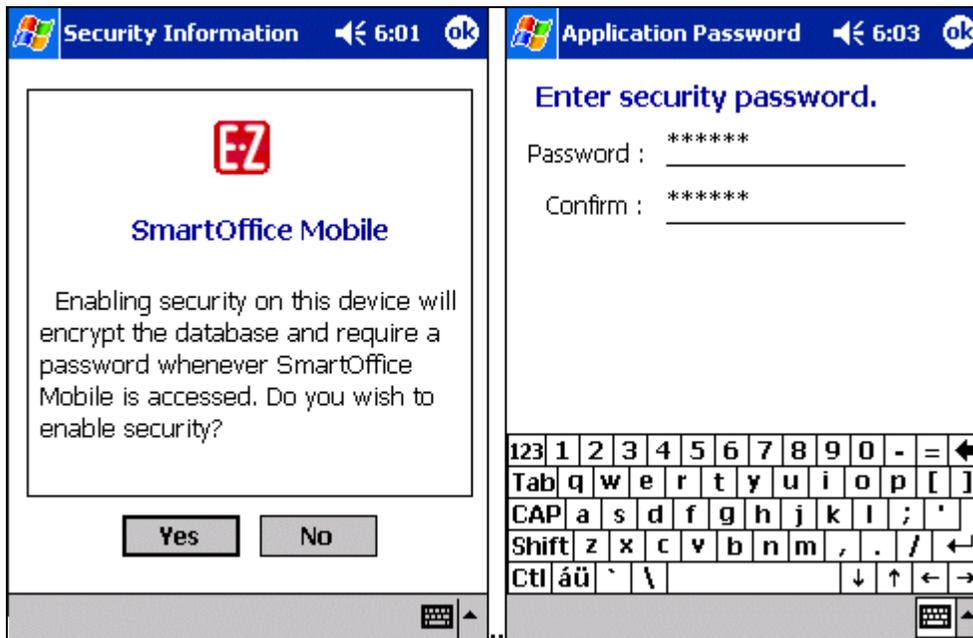
Accessing SmartOffice Mobile on the Pocket PC® Device

Tap the **Start** menu to display the program list and then tap **SmartOffice** to open the program.

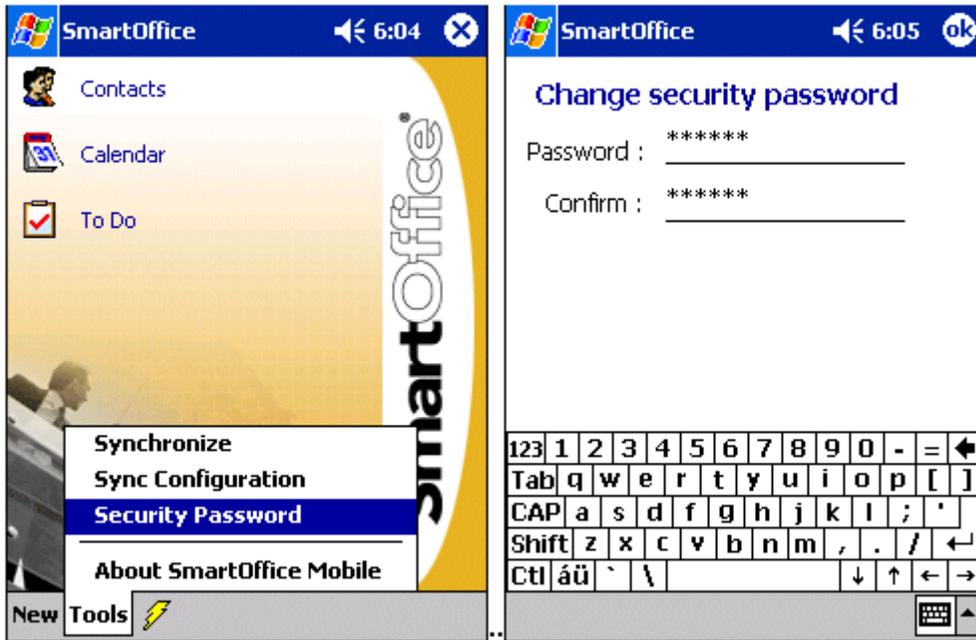


Running SmartOffice Mobile for the First Time

When launching SmartOffice for the first time, the **Security Information** screen is displayed. Security can be either enabled or disabled 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 **Application Password** screen. The password is required each time SmartOffice Mobile is launched. 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 selecting the **Security Password** option from the main SmartOffice Mobile menu.



When running SmartOffice Mobile for the first time, enter the database Office Name and database User Name in lower case letters in the **Synchronization Options** screen. Also, specify the appropriate synchronization and MobiLink Server information.

Note: Only one database can be used for synchronization.

Synchronization Options

To open the **Synchronization Options** screen, continue as follows:

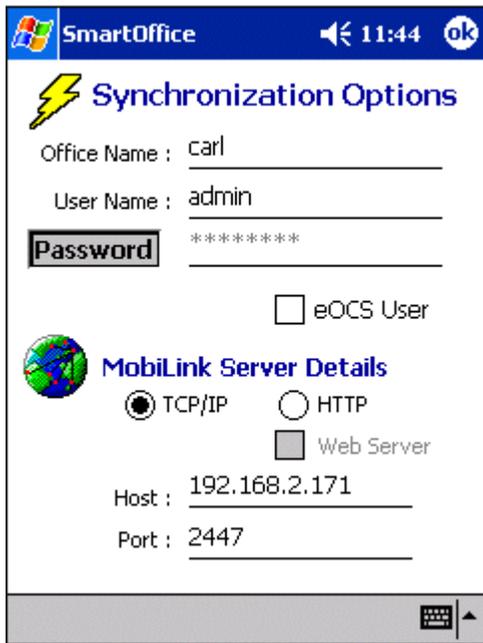
1. From the SmartOffice Mobile Main screen, tap **Tools** to list the following options:
Synchronize Sync Configuration and **About SmartOffice Mobile**.
2. Select **Sync Configuration** to open the **Synchronization Options** screen.



From the **Synchronization Options** screen, enter the following information:

- **Office Name:** SmartOffice Office Name
- **User Name:** SmartOffice User Name
- **Password:** Enter the SmartOffice User Password
- Select the communication method used to connect to the **MobiLink Server** (TCP/IP or HTTP)
- **Host:** Enter the IP address of the MobiLink Server
- **Port:** Enter the Communication Port

Note: The SmartOffice System Administrator should provide the communication method, host IP address, and port number.



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. This information will be provided by E-Z Data for SmartOffice Online users and by the IT department of corporate users.

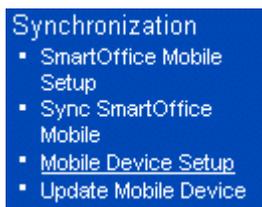
SmartOffice Login Information: The Office, User, and Password for accessing SmartOffice must be entered in the appropriate fields. To enter the password, tap the **Password** button, enter and confirm the SmartOffice login password, and tap the **OK** button. If the SmartOffice One Card System (eOCS) is being used with SmartOffice, select the **eOCS User** checkbox 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 users.

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

Setting Up SmartOffice Mobile Synchronization Criteria

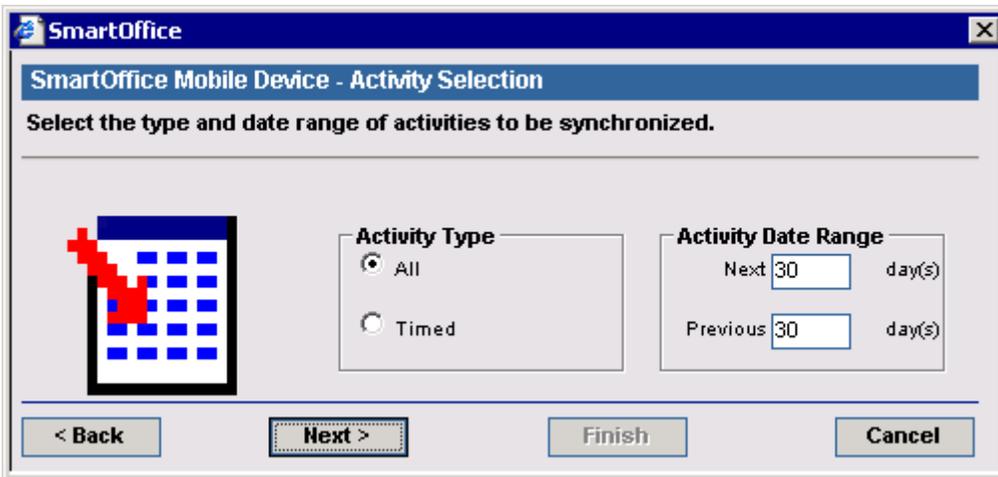
1. From the side menu, click **Synchronization** and select **Mobile Device Setup** to launch the Synchronization Setup Wizard.



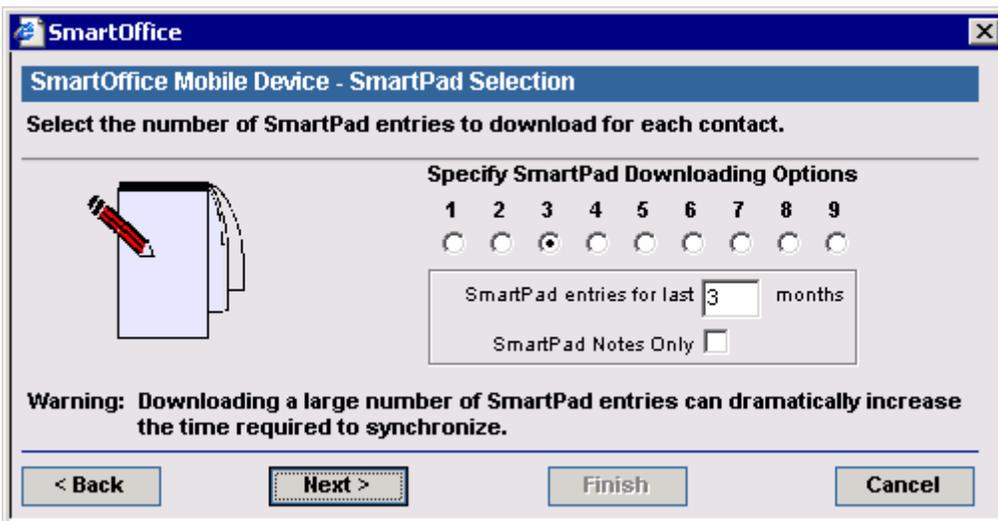
2. From the first screen of the Synchronization Setup Wizard, click the **Next** button.
3. Choose to synchronize all contacts or selected contacts and click the **Next** button. If All Contacts is selected, continue with step 4. When choosing the Selected Contacts option, the Filter/Set Selection dialog box opens. Select a set or filter of contacts to synchronize.



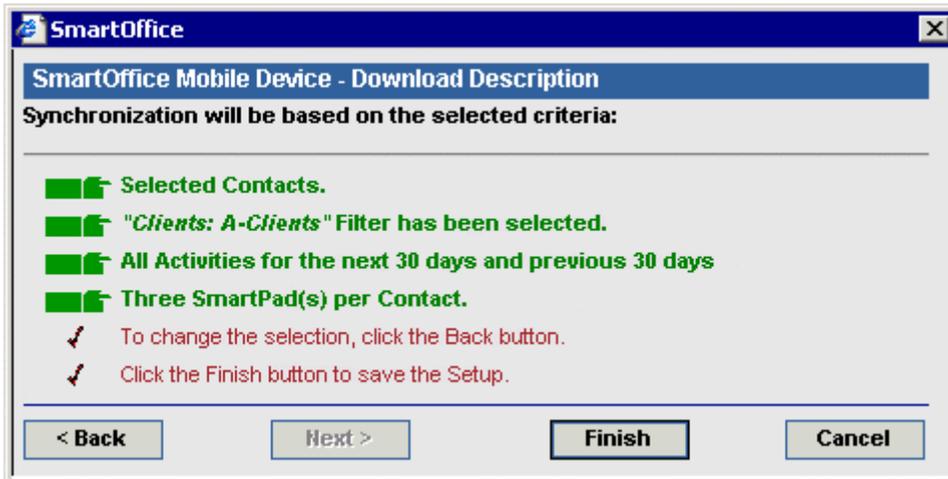
4. Select a date range of future and past activities for synchronization. Click the **OK** button to continue. There are two different ways to download the activities. Select the **All** option to download all types of activities or select the **Timed** option to download only the timed activities and click the **Next** button.



5. From the SmartPad Selection screen, set the number of SmartPad entries to synchronize. Alternately, a range in months or just SmartPad entries manually added as notes can be synchronized. Click the **Next** button.



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



- After the initial setup is complete, perform an ActiveSync® operation to Synchronize the data with the SmartOffice Mobile database on the Pocket PC® device.

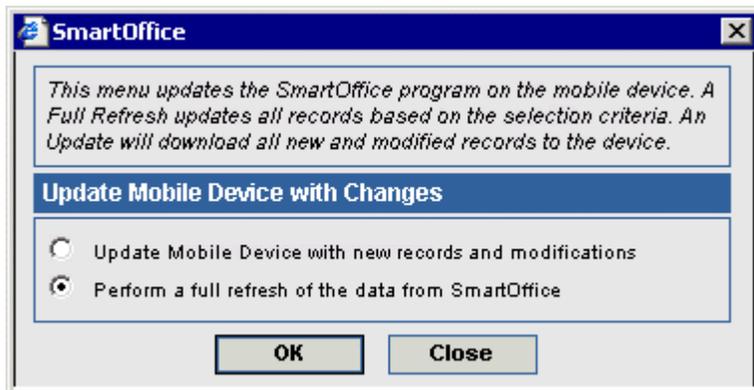
Preparing Data for Synchronization

After the synchronization criteria have been selected, perform an initial synchronization.

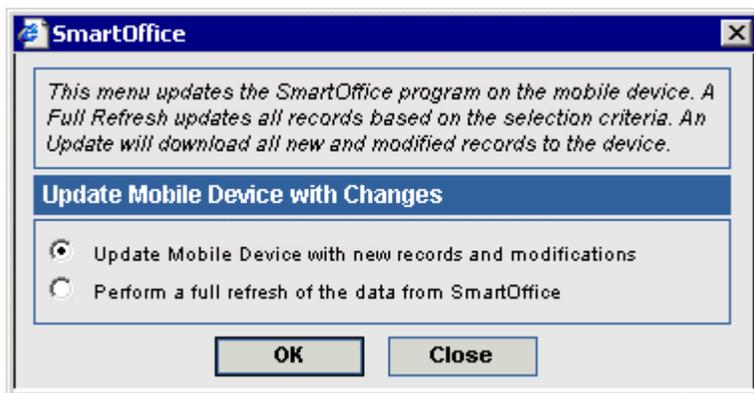
1. From the side menu, click **Synchronization** and select **Update Mobile Device** to open the Update Mobile Device with Changes dialog box.



2. Select the **Perform a full refresh of the data from SmartOffice** radio button to transfer data that meets the synchronization criteria to appropriate database tables.



3. Perform Synchronization with the PDA to complete the initial synchronization.
4. Complete the following steps to add new information from SmartOffice:
 - From the SmartOffice side menu, click **Synchronization** and select **Update Mobile Device** to open the Update Mobile Device with Changes dialog box.
 - Select the **Update Mobile Device with new records and modifications** radio button to populate any additions made in SmartOffice to the database table so they will be synchronized on the next Synchronization. Any data added/modified in SmartOffice Mobile on the PDA is added to SmartOffice on the next synchronization.



SmartOffice Mobile Main Screen

When the SmartOffice Mobile application is launched, after the initial setup and synchronization is complete, the application opens to the SmartOffice Mobile Main screen. SmartOffice Mobile is a menu driven application and the menu is accessible from the Main tab.



In the SmartOffice Mobile Main screen, there are four icons: **Contacts**, **Calendar**, **ToDo** and **Synchronize**. There are also two menu options **New** and **Tools**.

Contacts: add a new Contact record and view existing Contact records

Calendar: add an Activity and view existing Activity information

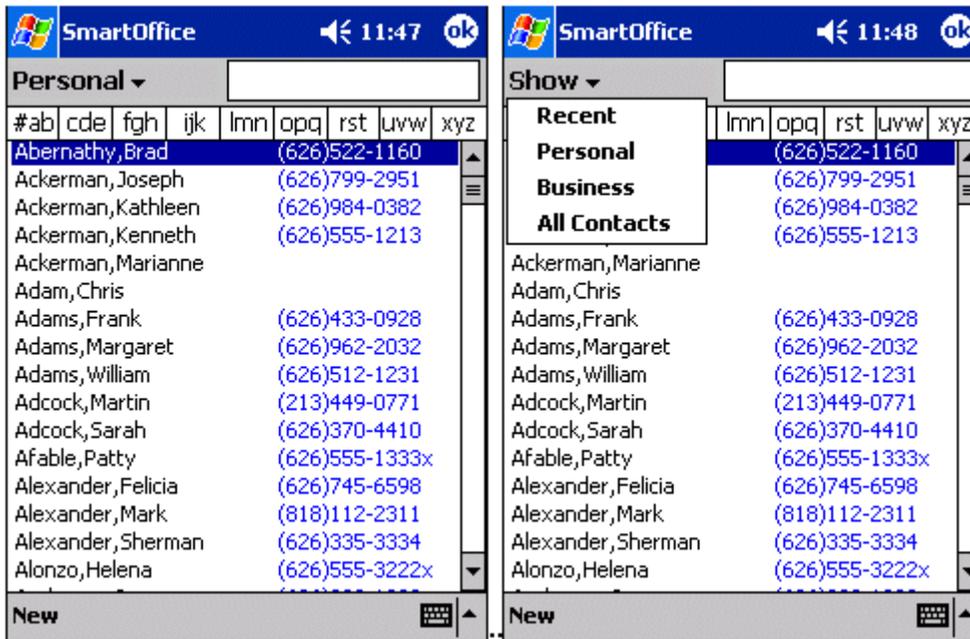
ToDo's: add a ToDo and view existing ToDo information

Synchronize: perform synchronization

New menu: add new Contacts, Activities and ToDo's.

Contacts

By default, when the **Contacts** icon is selected from the SmartOffice Mobile Main screen, the Personal (Individual) Contact Summary tab is displayed. The Contact Summary tab can display records in four different categories: **Recent**, **Personal**, **Business** and **All Contacts**. These options can be selected by tapping the drop-down arrow next to the **Personal** option.

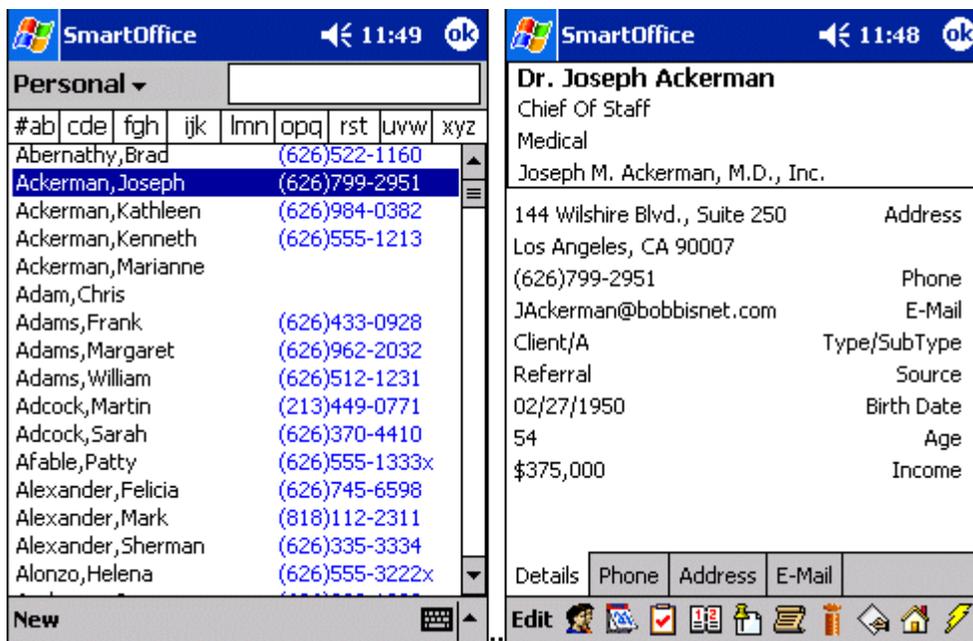


There are four different list screens to display the records:

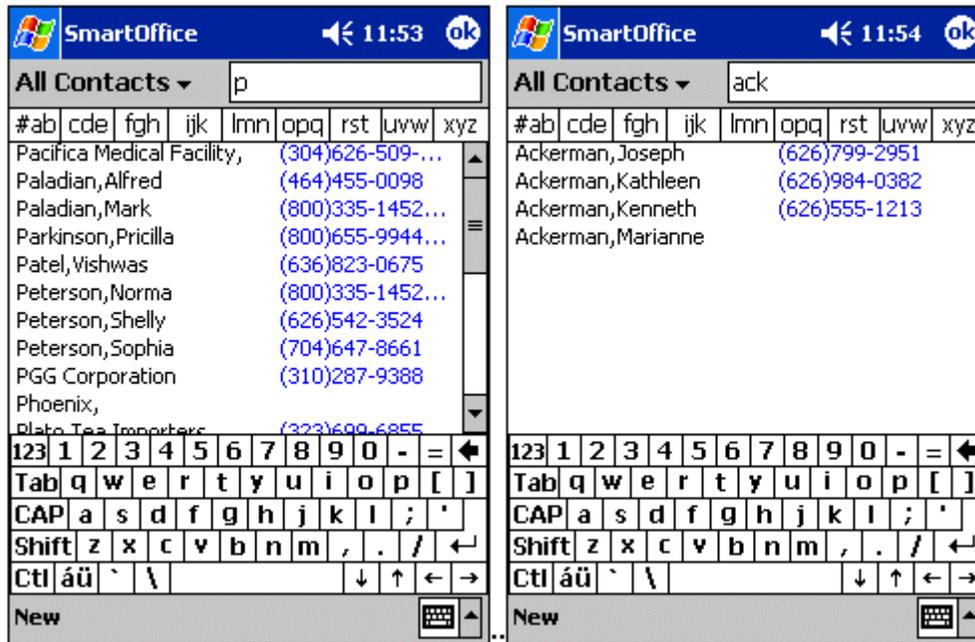
- **Recent:** Only the recently added or changed records (Individual Contacts and Business Contacts) are displayed on this list.
- **Personal:** Individual Contact records are listed here.
- **Business:** Business Contact records are listed here.
- **All Contacts:** Individual Contacts and Business Contacts records are listed here.

There are three ways to search for a **Contact** (Individual or Business) record:

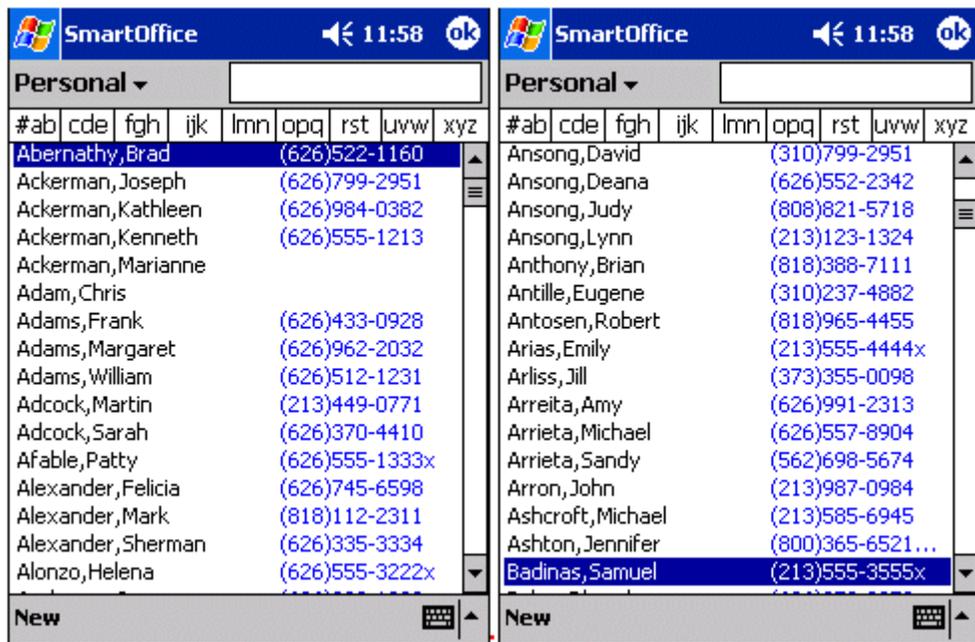
- Use the vertical scrollbar to scroll up and down the Contact list. Once the appropriate record is found, tap the Contact's name and the Contact **Details** tab.



- Enter a portion of the business name or individual contact’s last name in the search field provided on the top right hand corner to display the matching Contact record.



- Tap the alphabet tab to find a Contact record. Tapping “ab” highlights the first Contact whose last name begins with ‘A’. Tap “ab” again and it highlights the first Contact whose last name begins with ‘B’.

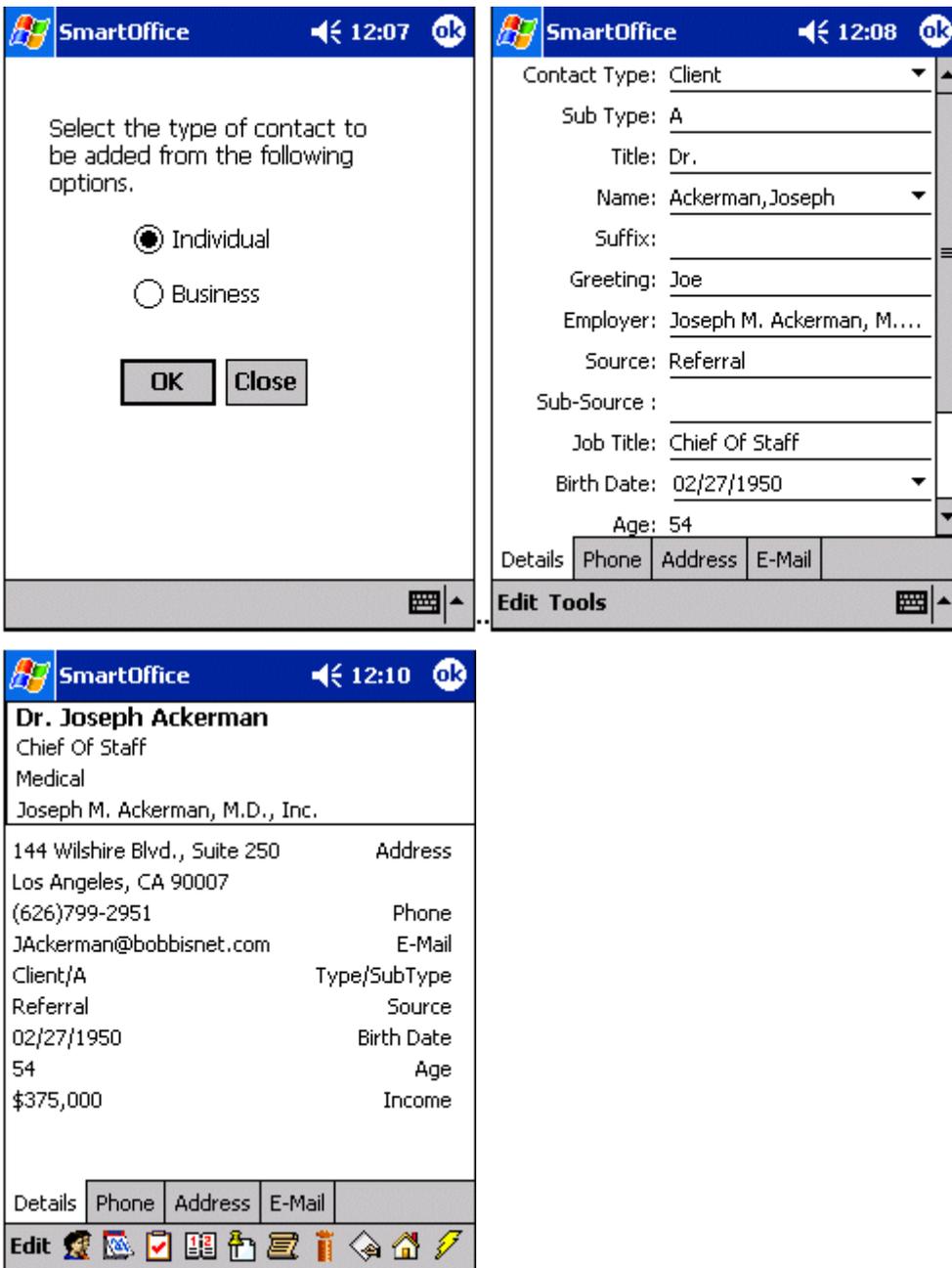


Creating an Individual Contact Record

There are two ways to create a new Contact Record:

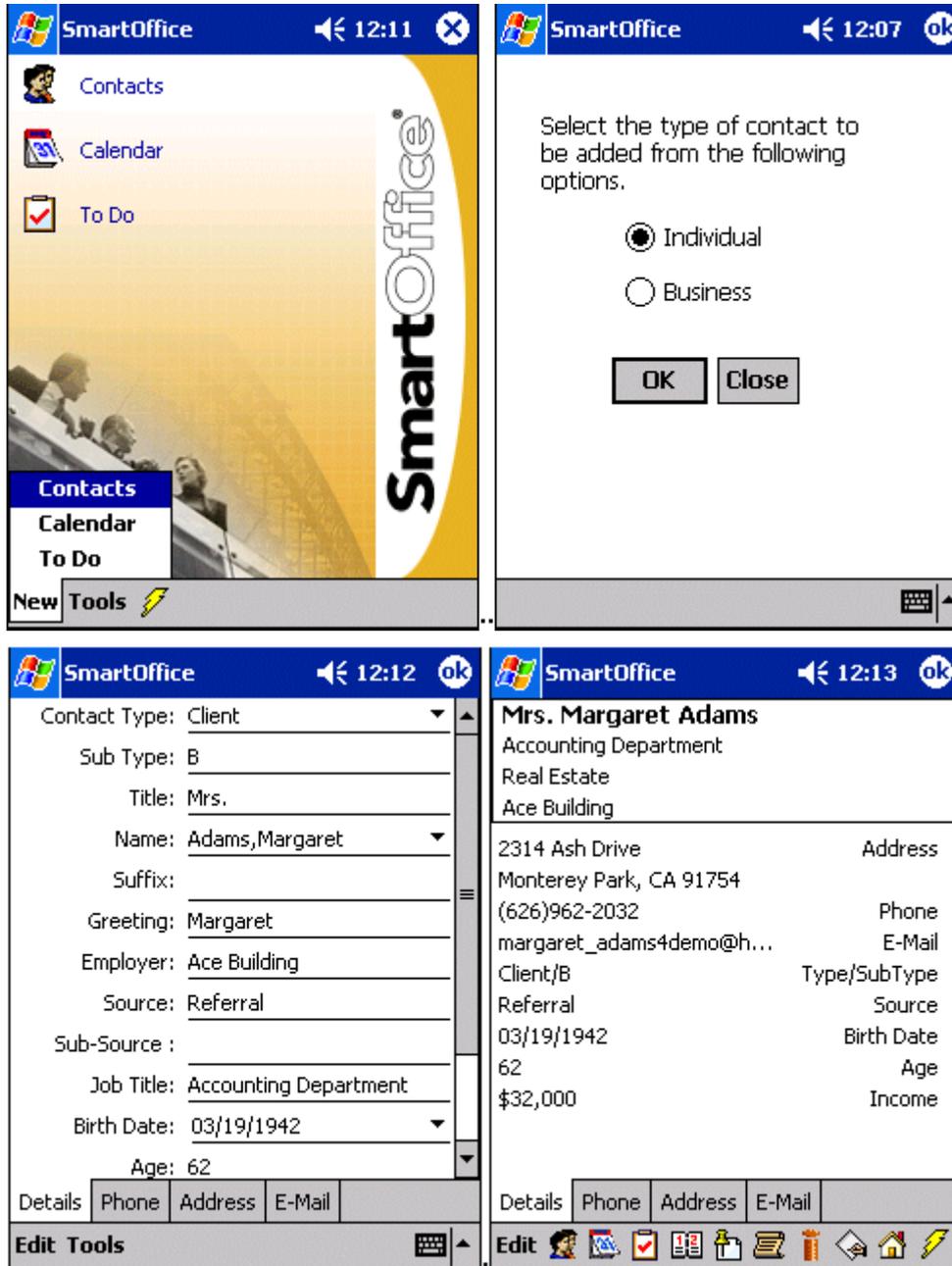
From the Contact Summary tab

1. From the SmartOffice Mobile Main tab, select **Contacts**. By default, the Personal (Individual) Contact Summary tab is displayed.
2. Tap **New** to open the Record Type dialog box.
3. Select the **Individual** option and then tap **OK** to display the **Edit** screen.
4. Enter the required Individual Contact information and then tap **OK** to display the Detail tab.



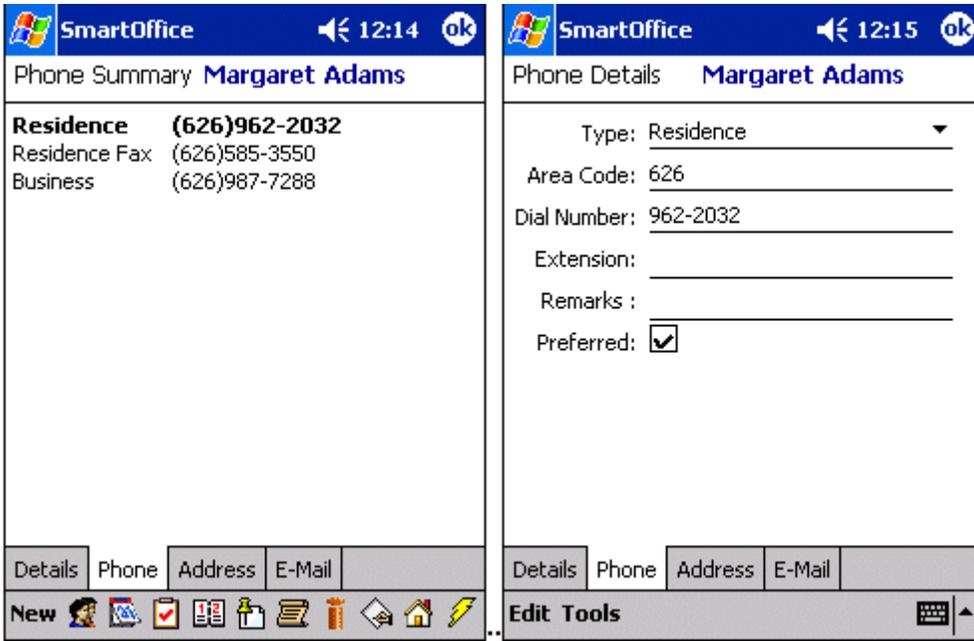
From the New menu in the SmartOffice Mobile Main screen

1. From the **New** menu, select **Contact**.
2. Tap **New** to open the Record Type dialog box.
3. Select the **Individual** option and then tap **OK** to display the **Details** tab.



Contact Phone Number

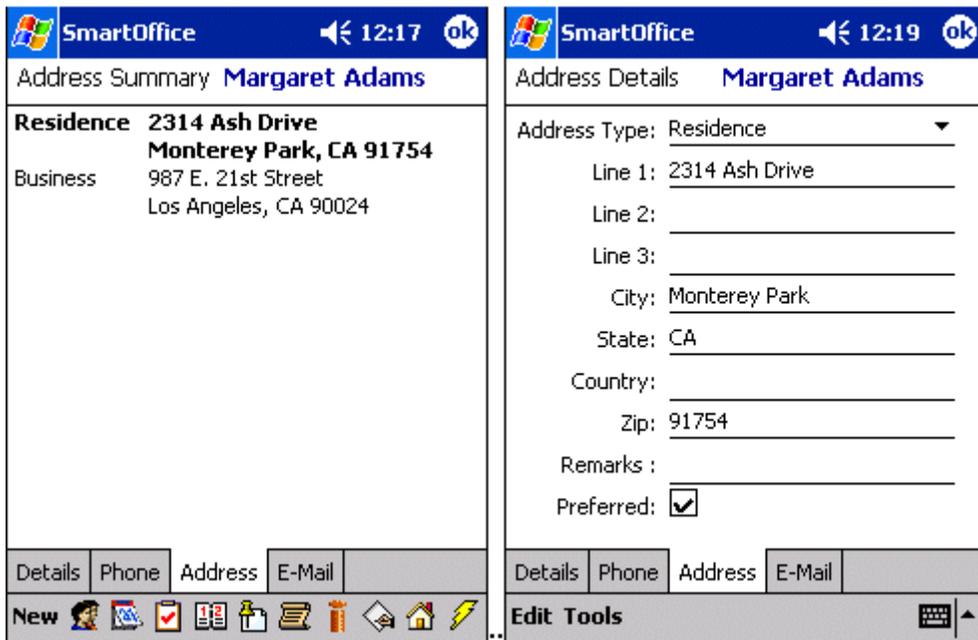
1. From the Contact Details tab, tap the **Phone** tab to open the **Phone Summary**.
2. Tap **New** to open the Phone Detail dialog box.
3. Tap the **Type** drop-down arrow to specify the phone type.
4. Enter the remaining phone information and then tap **OK** to save the additions.



Contact Address

1. From the Contact Details tab, tap the **Address** tab to open the **Address Summary**.
2. Tap **New** to open the Address Detail dialog box.
3. Tap the **Type** drop-down arrow to specify the address type.
4. Enter the remaining address information and then tap **OK** to save the additions.

Note: The preferred Phone Number and Address are displayed on the Contact Details tab.

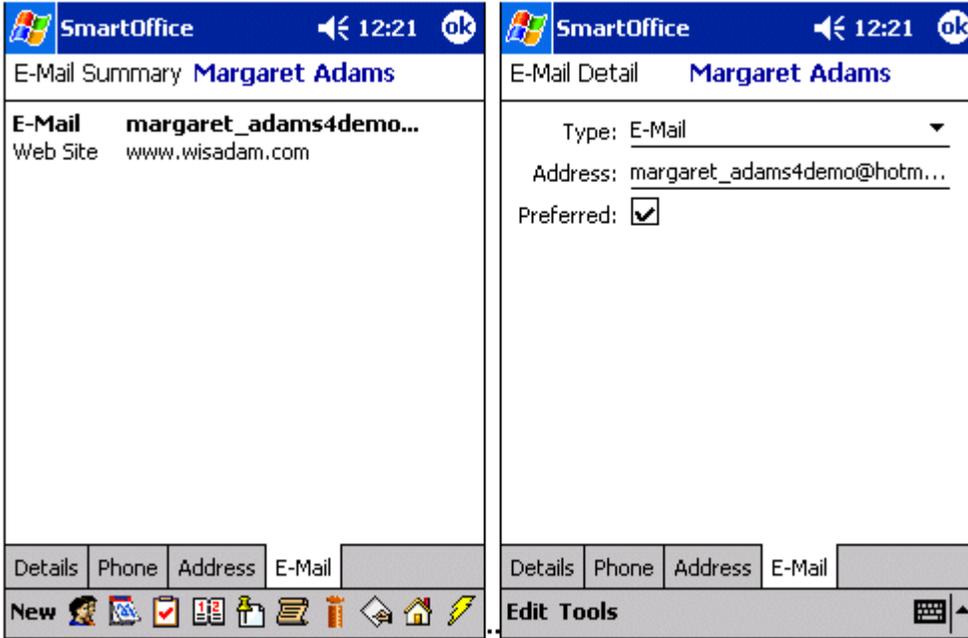


Contact E-mail/Web Address

1. From the Contact Details tab, tap the **E-mail** tab to open the **E-mail Summary**.
2. Tap **New** to open the E-mail Details dialog box.

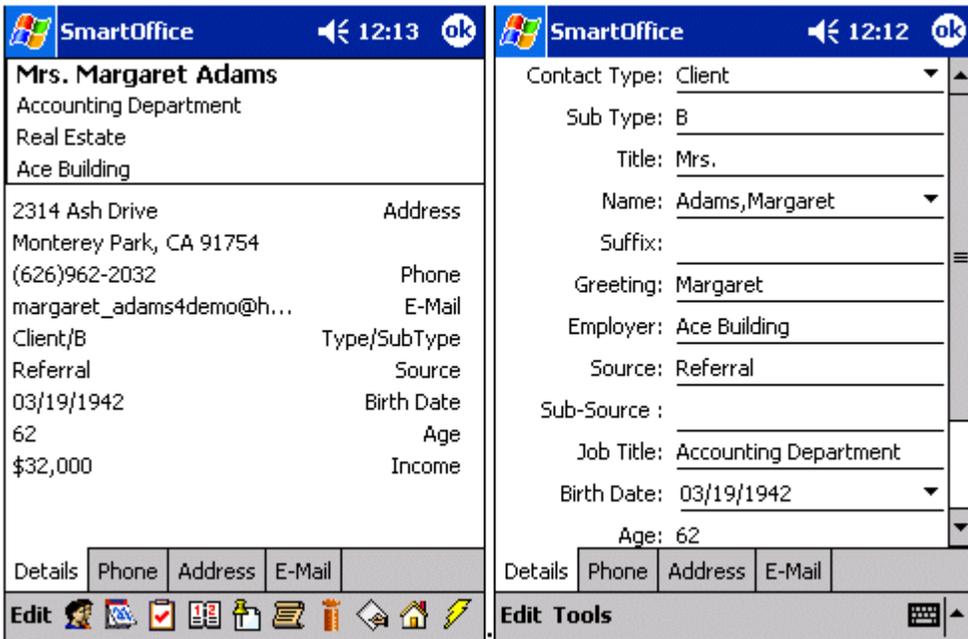
3. Tap the **Type** drop-down arrow to select either the **E-mail** or **Web Site** option.
4. Enter the remaining address information in the **Address** field.

Note: The preferred E-mail/Web Site is displayed on the Contact Details tab.



Modifying a Contact Record

1. From the Contact Details tab, tap **Edit**.
2. Modify the contact's information and tap **OK** to save the changes.



Modifying a Contact's Phone Number

1. From the Contact Details tab, tap the **Phone** tab to open the **Phone Summary**.
2. Tap the number for modification to open the Phone Detail dialog box.

3. Modify the information as necessary and then tap **OK** to save the changes.

Modifying Contact Address

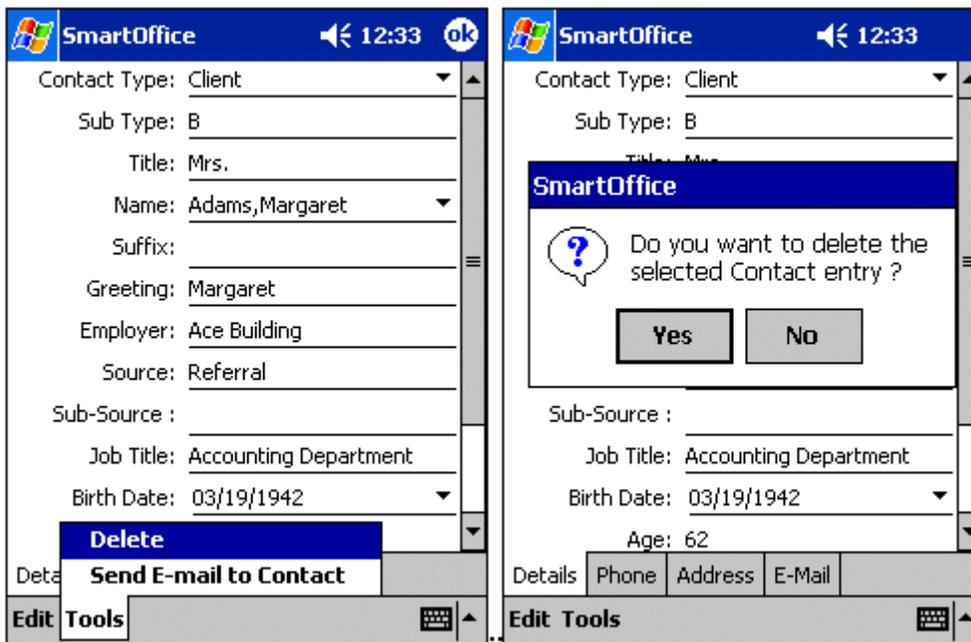
1. From the Contact Details tab, tap the **Address** tab to open the **Address Summary**.
2. Tap the address for modification to open the Address Detail dialog box.
3. Modify the information as necessary and then tap **OK** to save the changes.

Modifying E-mail Address

1. From the Contact Details tab, tap the **E-mail** tab to open the **E-mail Summary**.
2. Tap the address for modification to open the E-mail Detail dialog box.
3. Modify the information as necessary and then tap **OK** to save the changes.

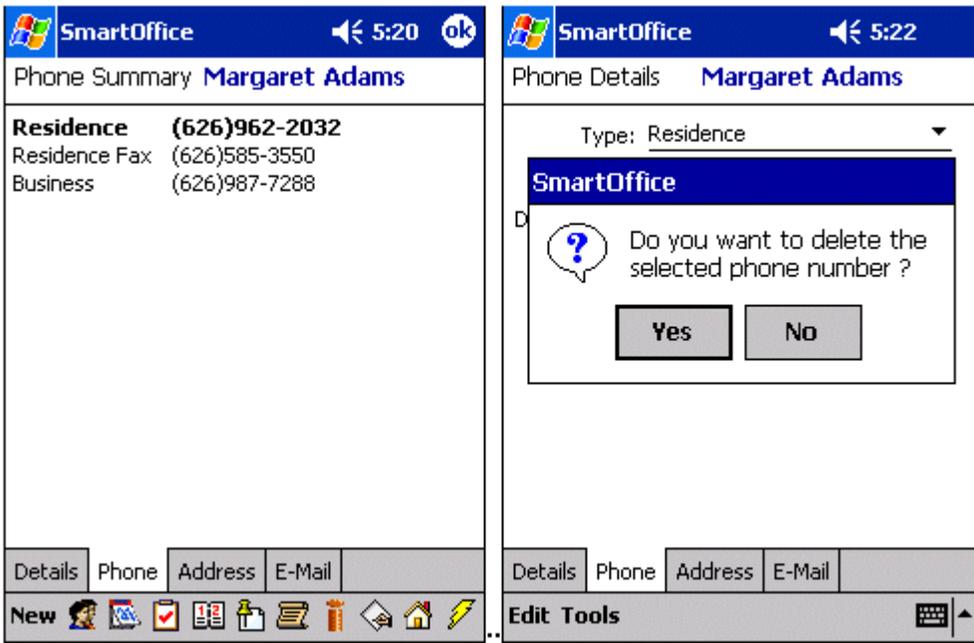
Deleting a Contact Record

1. From the Contact Details tab, tap **Edit** to open the **Details** tab.
2. Tap **Tools** and select **Delete** to open the Record Deletion Confirmation dialog box.
3. Tap **Yes** to delete the selected Contact record.



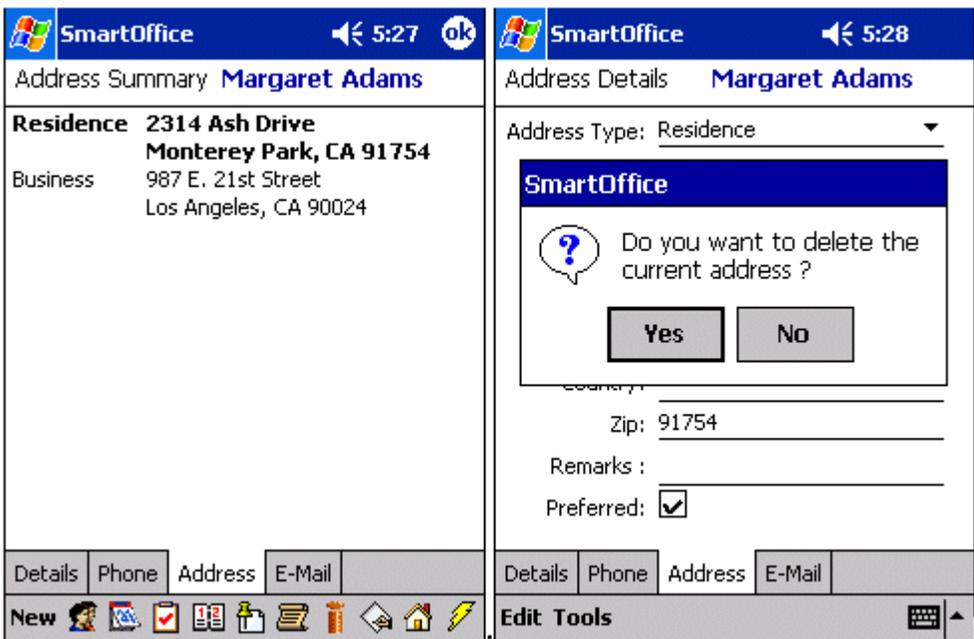
Deleting a Contact's Phone Number

1. From the Contact Details tab, tap the **Phone** tab to open the **Phone Summary**.
2. Tap the number to be deleted to display the Phone Detail tab.
3. Tap **Tools** and select **Delete** to open the Record Deleting Confirmation dialog box.
4. Tap **Yes** to delete the selected address.



Deleting a Contact's Address

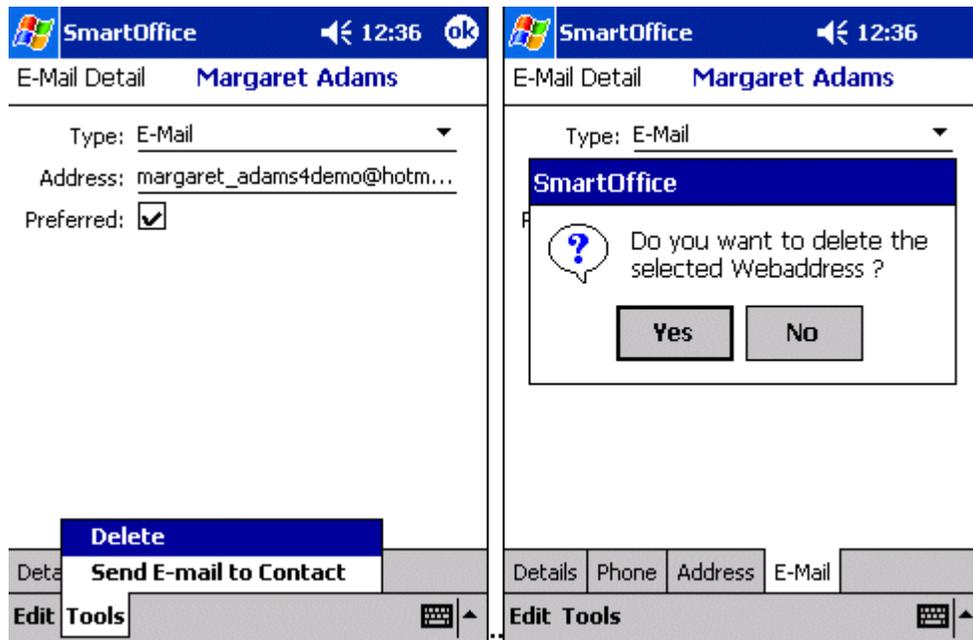
1. From the Contact Details tab, tap the **Address** tab to open the **Address Summary**.
2. Tap the address to be deleted to open the Address Detail tab.
3. Tap **Tools** and select **Delete** to open the Record Deleting Confirmation dialog box.
4. Tap **Yes** to delete the selected address.



Deleting a Contact's E-mail/Web Address

1. From the Contact Details tab, tap the **E-mail** tab to open the **E-mail Summary**.
2. Tap the address to be deleted to open the E-mail Detail tab.
3. Tap **Tools** and select **Delete** to open the Record Deleting Confirmation dialog box.

4. Tap **Yes** to delete the selected address.

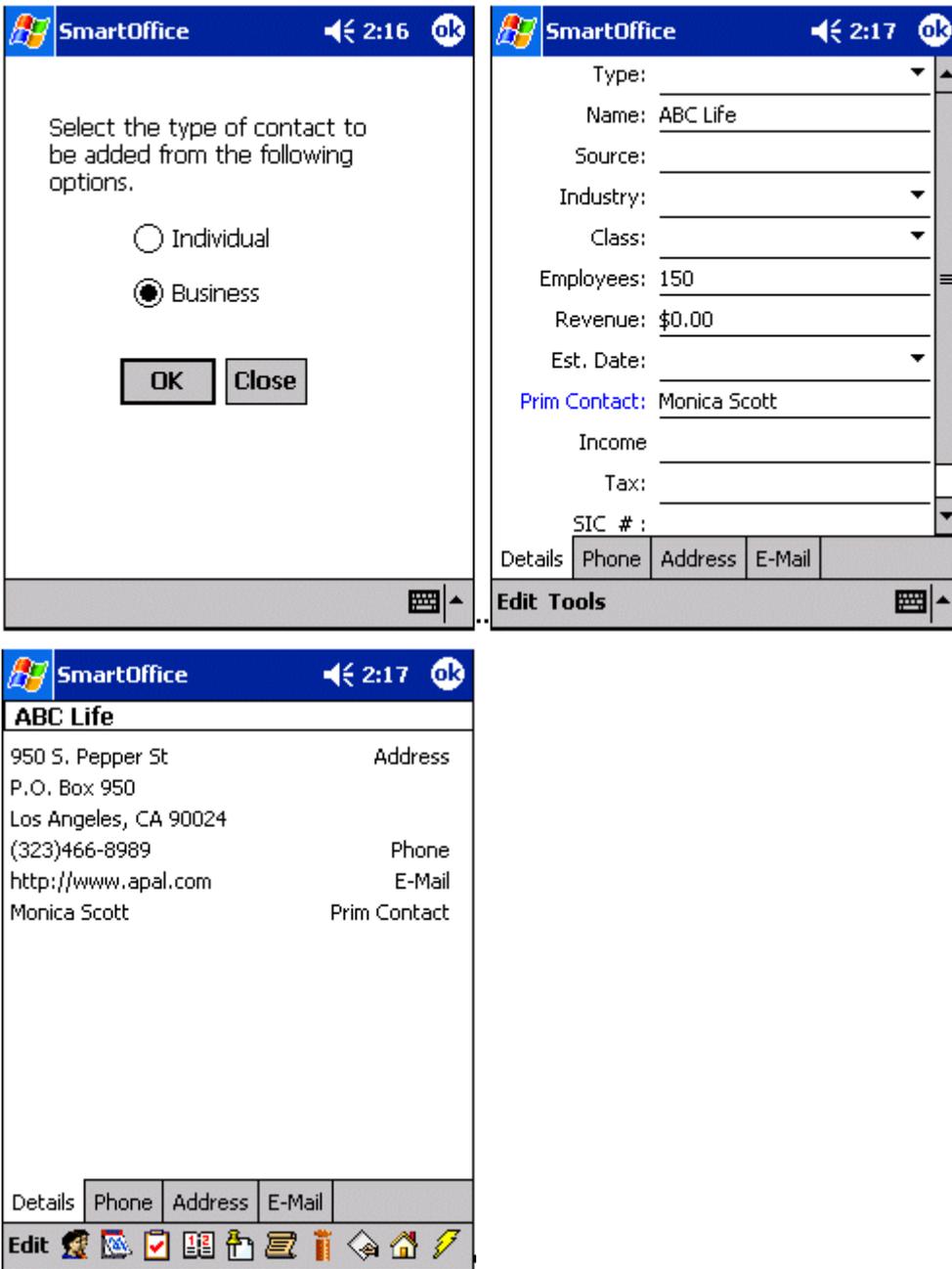


Creating a Business Contact Record

There are two ways to create a new Business Contact record:

From the Contact Summary screen

1. From the SmartOffice Mobile Main screen, select **Contacts**. By default, the Personal (Individual) Contact Summary tab should be displayed.
2. Tap **New** to open the Record Type dialog box.
3. Select the **Business** option and then tap **OK** to display the **Details** tab.
4. Enter the business information and then tap the **Phone** and **Address** tabs to enter the corresponding information.
5. Tap **OK** to save the information and display the Contact Details tab.



From the New menu in SmartOffice Mobile Main screen

1. From the **New** menu, select **Contact**.
2. Tap **New** to open the Record Type dialog box.
3. Select the **Business** option and then tap **OK** to display the **Details** tab.
4. Enter the business information and then tap the **Phone and Address** tabs to enter the corresponding information.
5. Tap **OK** to save the information and display the Contact Details tab.



Business Phone Number

1. From the Contact Details tab, tap the **Phone** tab to display the **Phone Summary**.
2. Tap **New** 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 **OK** to save the additions.

Business Address

1. From the Contact Details tab, tap the **Address** tab to display the **Address List** tab.
2. Tap **New** to open the Address Details dialog box.
3. Tap the **Type** drop-down arrow to specify the address type.

4. Enter the remaining address information and then tap **OK** to save the additions.

Note: Both the preferred Phone Number and preferred Address are displayed on the Contact Details tab of the Contact record.

Business E-mail/Web Address

Adding an e-mail/web address for a Business record is identical to the steps required in adding an Individual Contact record. Please refer to the [Contact E-mail](#) section.

Modifying a Business Record

Modifying a Business record is identical to the steps required in modifying an Individual Contact record. Please refer to the [Modifying a Contact Record](#) section.

Modifying a Business Phone Number

Modifying a Business phone number is identical to the steps required in modifying an Individual Contact phone number. Please refer to the [Modifying a Contact's Phone Number](#) section.

Modifying a Business Address

1. From the Contact Details tab, tap the **Address** tab to display the **Address Summary**.
2. Tap the address for modification to open the Address Details dialog box.
3. Modify the information as necessary and then tap **OK** to save the changes.

Deleting a Business Record

1. From the Contact Details tab, tap **Edit** to open the **Details** tab.
2. Tap **Tools** and select **Delete** to display the Record Deletion Confirmation box.
3. Tap **Yes** to delete the selected Contact record.

Deleting a Business Phone Number

1. From the Contact Details tab, tap the **Phone** tab to open the **Phone Summary**.
2. Tap the Number to be deleted to open the Phone Detail tab.
3. Tap **Tools** and select **Delete** to display the Record Deleting Confirmation dialog box.
4. Tap **Yes** to delete the selected address.

Deleting a Business Address

1. From the Contact Details tab, tap the **Address** tab to open the **Address Summary**.
2. Tap the Address to be deleted to open the Address Detail tab.
3. Tap **Tools** and select **Delete** to display the Record Deleting Confirmation dialog box.
4. Tap **Yes** to delete the selected address.

Deleting a Business E-mail/Web Address

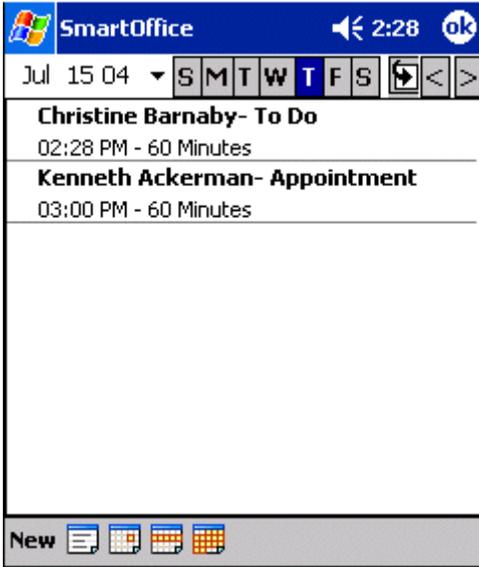
1. From the Contact Details tab, tap the **E-mail** tab to open the **E-mail Summary**.
2. Tap the address to be deleted to open the E-mail Detail tab.
3. Tap **Tools** and select **Delete** to display the Record Deleting Confirmation dialog box.
4. Tap **Yes** to delete the selected address.

Calendar

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

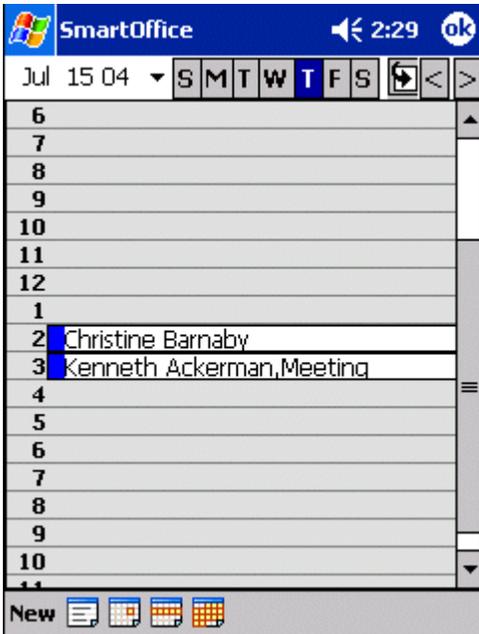
AgendaView

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



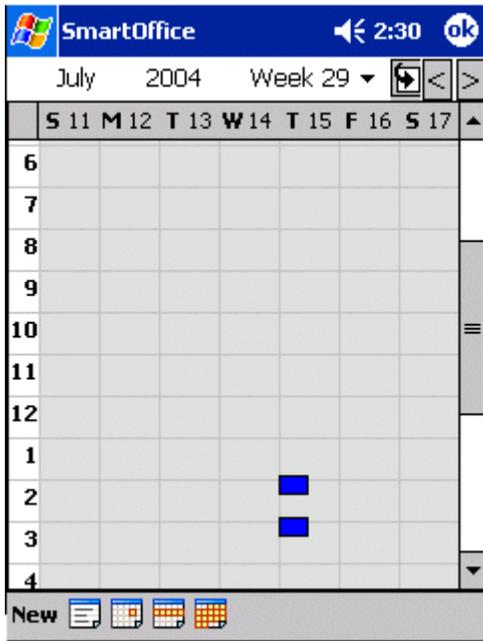
DayView

Select **Calendar** from the SmartOffice Mobile Main screen to open the DayView Calendar. The **DayView** is used to display the activities for a specific day. The DayView for a previous or future days' activities is displayed by tapping the left or right arrows.



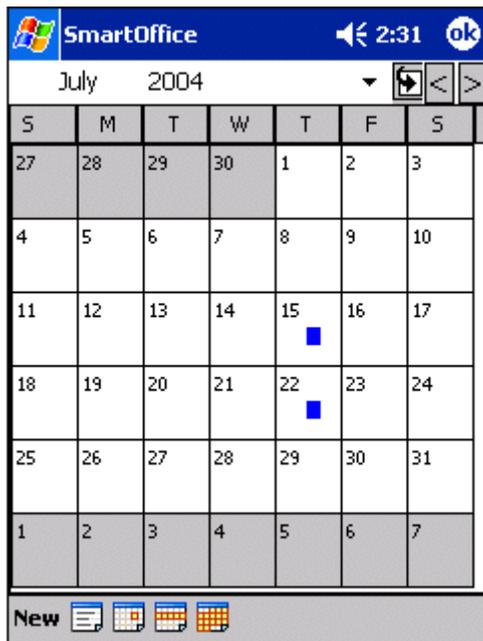
WeekView

The **WeekView** is used to view activities for a specific week. Previous or future weeks' activities can be displayed by tapping the left or right arrows.



MonthView

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



Adding an Activity from the Calendar

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

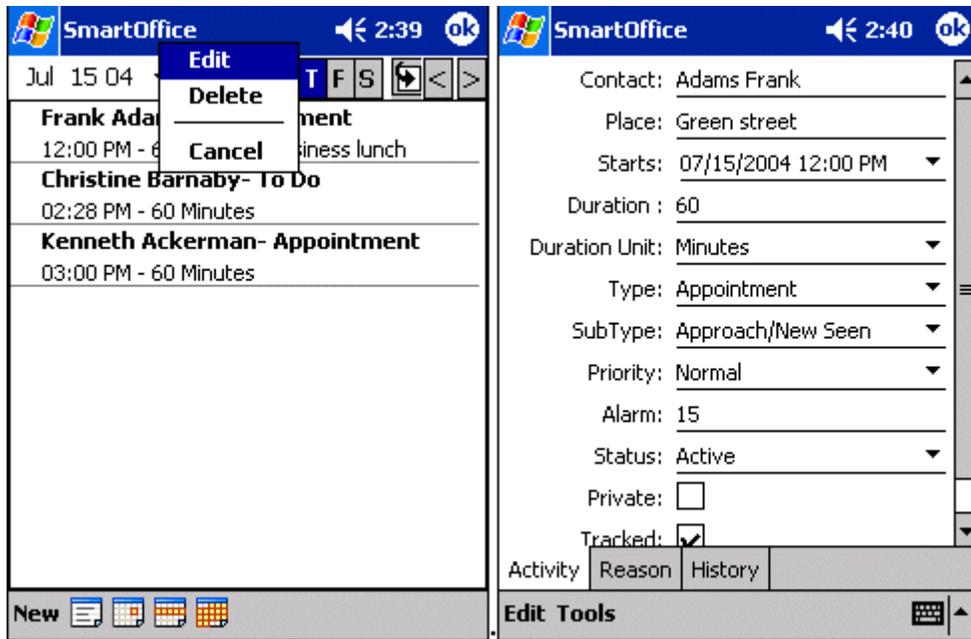
The image displays two side-by-side screenshots of the SmartOffice mobile application's 'Activity Details' screen. Both screens show a blue header with the SmartOffice logo, a back arrow, the time (2:34 on the left, 2:36 on the right), and an 'OK' button. The left screenshot shows a form with the following fields: Contact: Frank Adams; Place: Green street; Starts: 07/15/2004 12:00 PM; Duration: 60; Duration Unit: Minutes; Type: Appointment; SubType: Approach/New Seen; Priority: Normal; Alarm: 15; Status: Active; Private: ; Tracked: . The right screenshot shows the 'Subject' field with the text 'business lunch' and the 'Activity Reason' field with the text 'Meeting with client to discuss about new insurance policies'. Both screens have a bottom bar with 'Activity', 'Reason', and 'Edit' buttons.

Modifying an Activity from the Calendar

There are two ways to modify an activity:

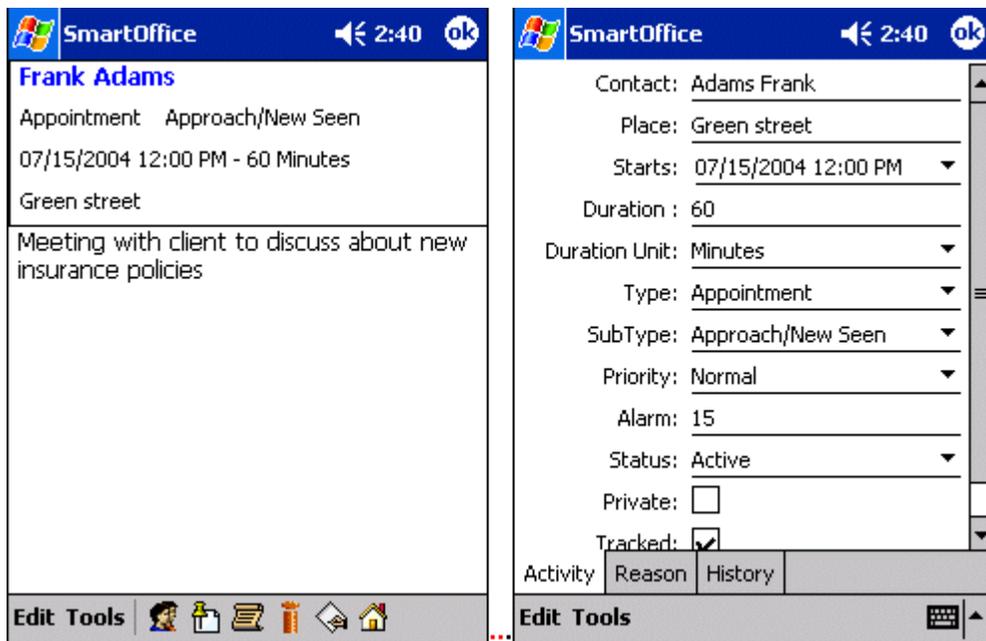
From the AgendaView

1. From the SmartOffice Mobile Main screen, select **Calendar** to open the **AgendaView** calendar, listing all the activities scheduled for the current date displayed.
2. Hold the stylus on an Activity to open a menu with the options: Edit, Delete, and Cancel.
3. Tap **Edit** to open the Activity Details tab in edit mode.
4. Modify the information as necessary and then tap **OK** to save the changes.



From the Activity Details tab

1. From the SmartOffice Mobile Main screen, select **Calendar** to open the **AgendaView** calendar, listing all the activities scheduled for the current date displayed.
2. Tap the Activity to be modified to display the Activity Detail tab in read-only mode.
3. Tap **Edit** to switch the Activity Details tab to Edit mode.
4. Modify the information as necessary and then tap **OK** to save the changes.

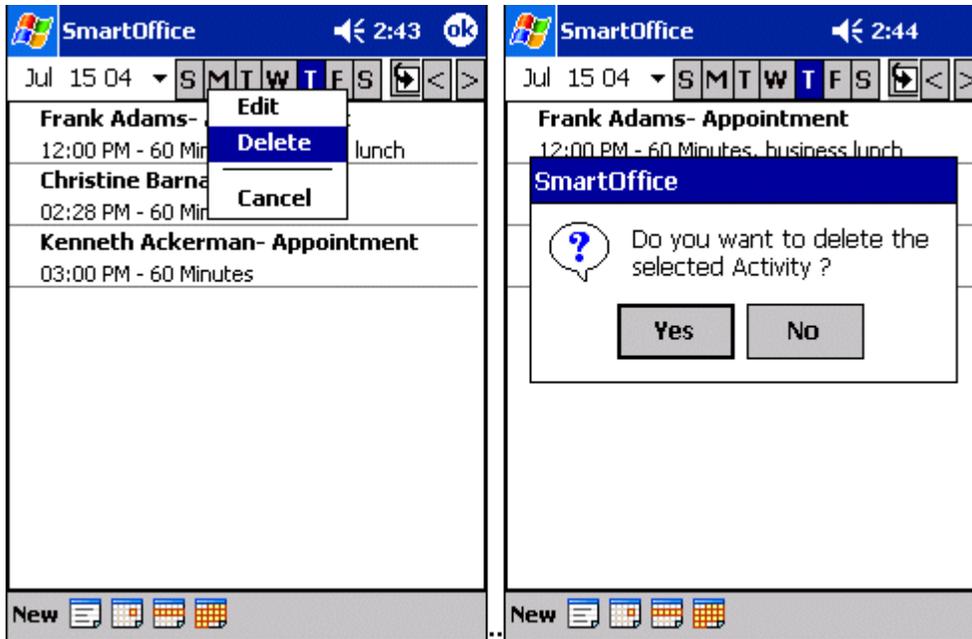


Deleting an Activity from the Calendar

There are three ways to delete an activity:

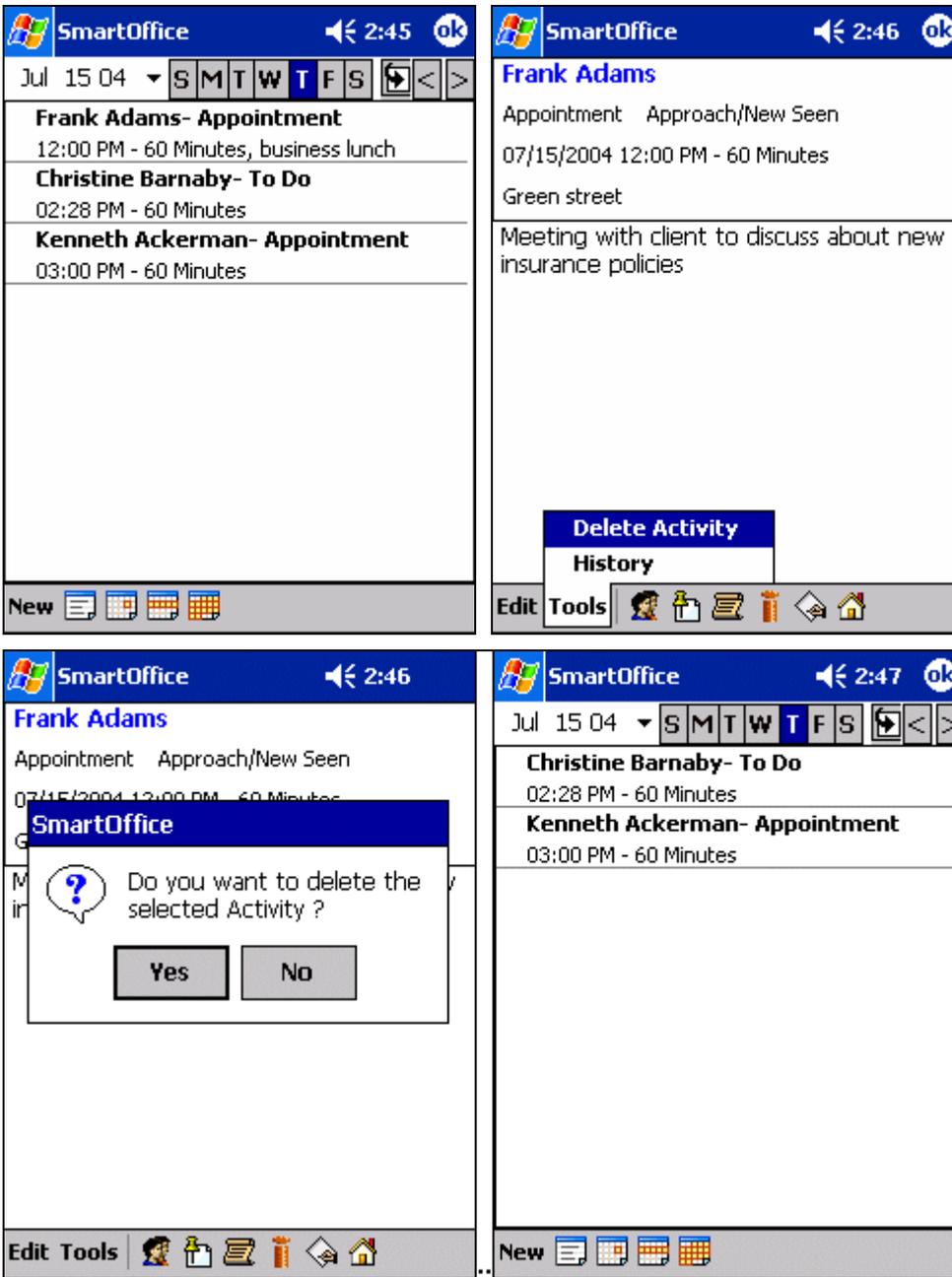
From the AgendaView

1. From the SmartOffice Mobile Main screen, select **Calendar** to open the **AgendaView** calendar, listing all the activities scheduled for the current date displayed.
2. Hold the stylus on an Activity to open a menu with the options: Edit, Delete and Cancel.
3. Select **Delete** to open the Delete Record confirmation message box.
4. Tap **Yes** to delete the activity.



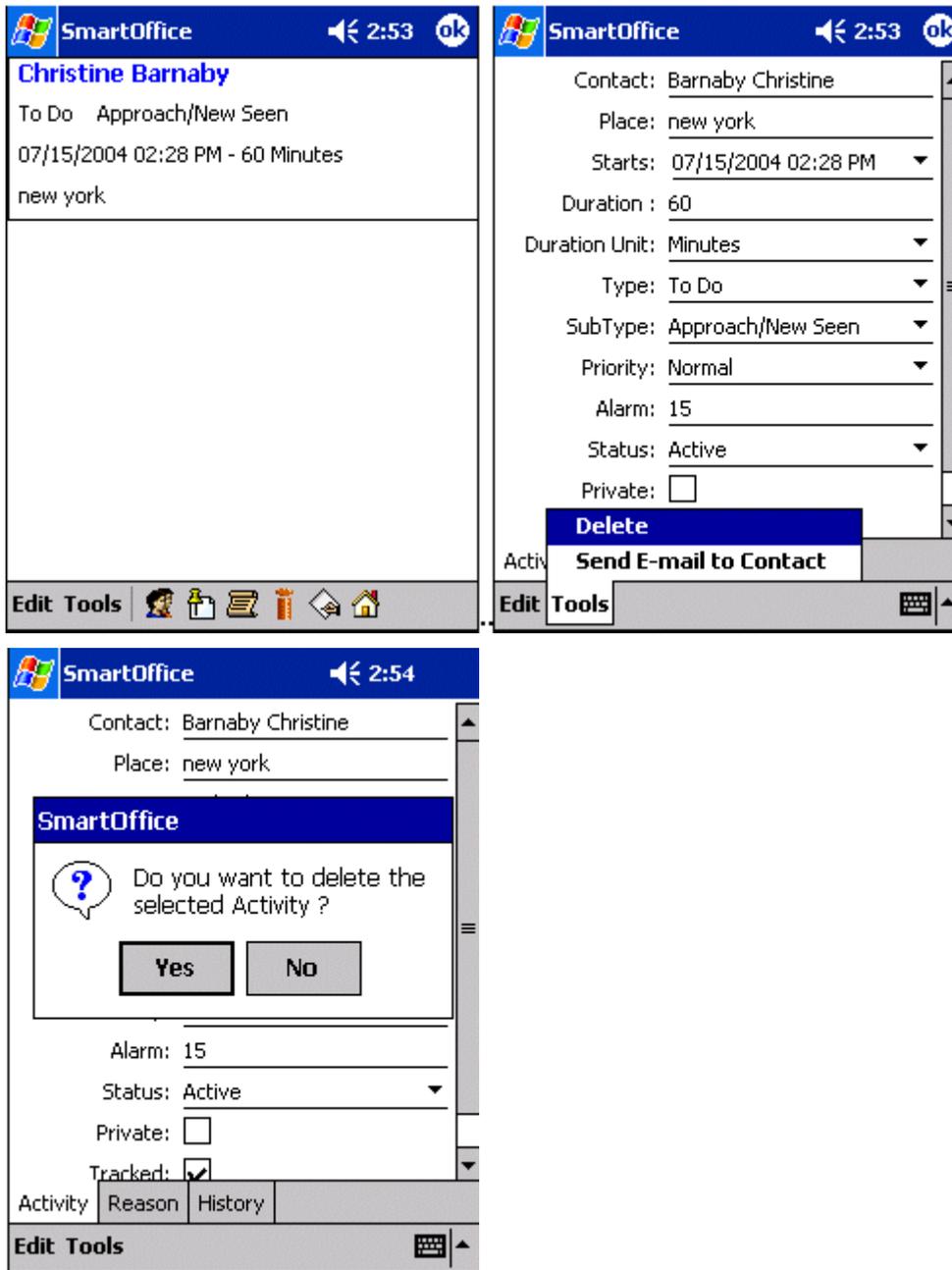
From the Activity Detail tab (read-only mode)

1. From the SmartOffice Mobile Main screen, select **Calendar** to open the **AgendaView** calendar, listing all the scheduled activities for the current date displayed.
2. Tap the activity to be deleted to display the Activity Detail tab in read-only mode.
3. Tap **Tools** and select **Delete Activity** to open a Delete Activity Record confirmation message box.
4. Tap **Yes** to delete the activity.



From the Activity Edit tab (edit mode)

1. From the SmartOffice Mobile Main screen, select **Calendar** to open the **AgendaView** calendar, which lists all the scheduled activities for the current date.
2. Tap an activity to be deleted to display the Activity Detail tab in read-only mode.
3. Tap **Edit** to switch Activity Details tab to edit mode.
4. Tap **Tools** and select **Delete** to open a Delete Record confirmation dialog box.
5. Tap **Yes** to delete the activity.

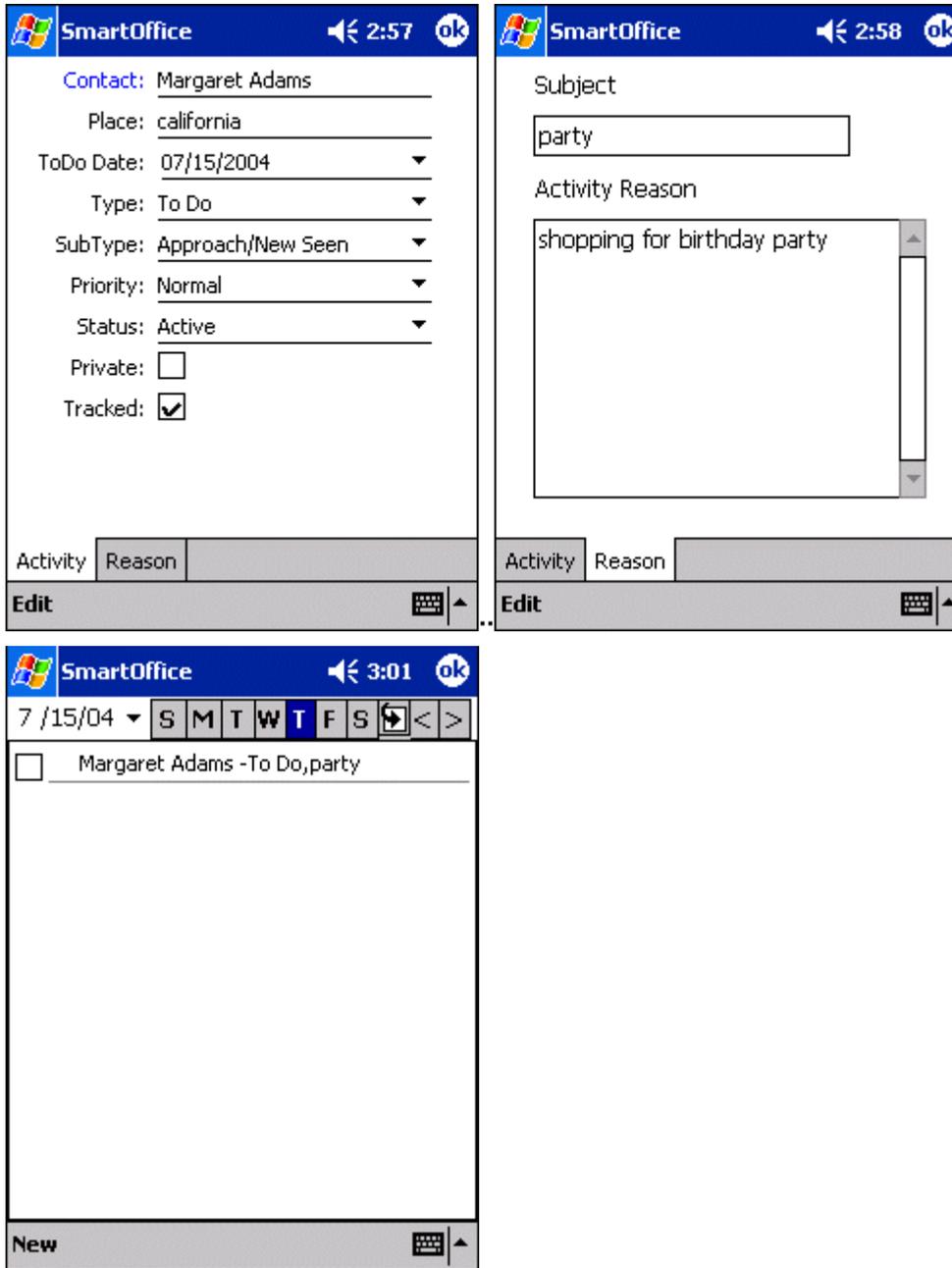


ToDo

From the SmartOffice Mobile Main screen, select **ToDo's** to open the non-timed activities list.

Adding a ToDo Item

1. From the SmartOffice Mobile Main screen, select **ToDo's** to open the non-timed activities list.
2. Tap **New** to open the Activity Details tab.
3. Enter the non-timed activity information and then tap **OK** to save the activity.



Modifying a ToDo Item

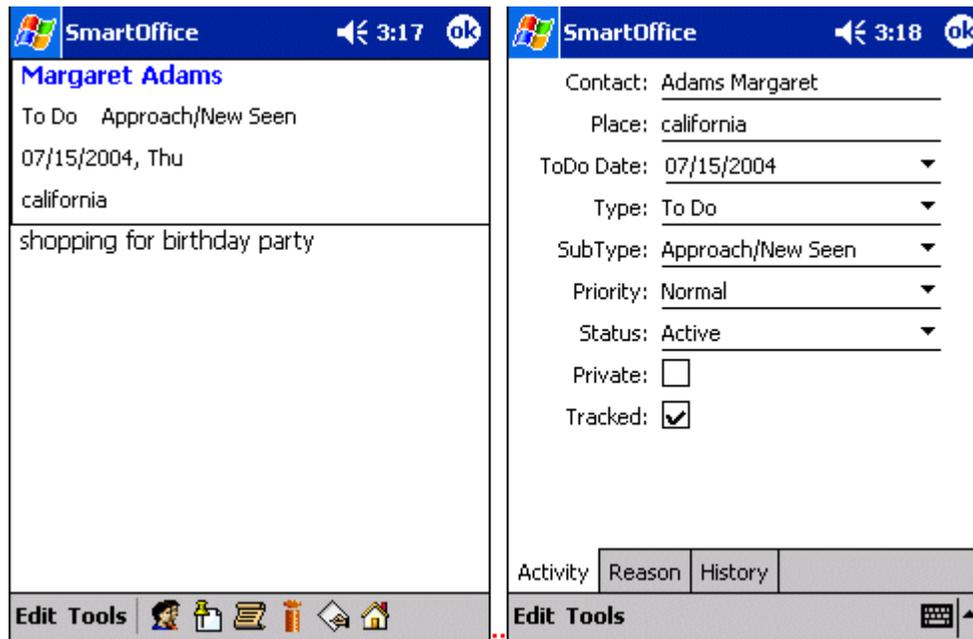
There are two ways to modify a **ToDo**:

From the ToDo List

1. From the SmartOffice Mobile Main screen, select **ToDo's** to open the ToDo List, which shows all the ToDo's scheduled for the current date shown.
2. Hold the stylus down on a **ToDo** to open a menu with Edit, Delete, and Cancel options.
3. Tap **Edit** to open the Activity Details tab in edit mode.
4. Make the necessary modifications and then tap **OK** to save the changes.

From the Activity Edit tab

1. From the SmartOffice Mobile Main screen, select **ToDo's** to open the ToDo List, which shows all the ToDo's scheduled for the current date shown.
2. Tap the **ToDo** to be modified to display the Activity Details tab in read-only mode.
3. Tap **Edit** to switch the Activity Details tab to edit mode.
4. Make the necessary modifications and then tap **OK** to save the changes.

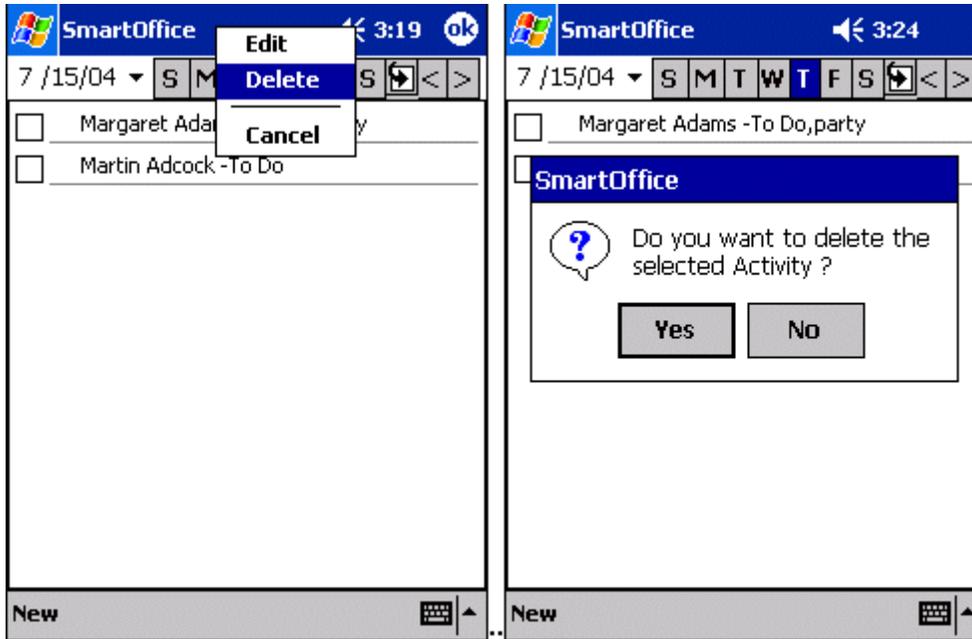


Deleting a ToDo

There are two main ways to delete a **ToDo**:

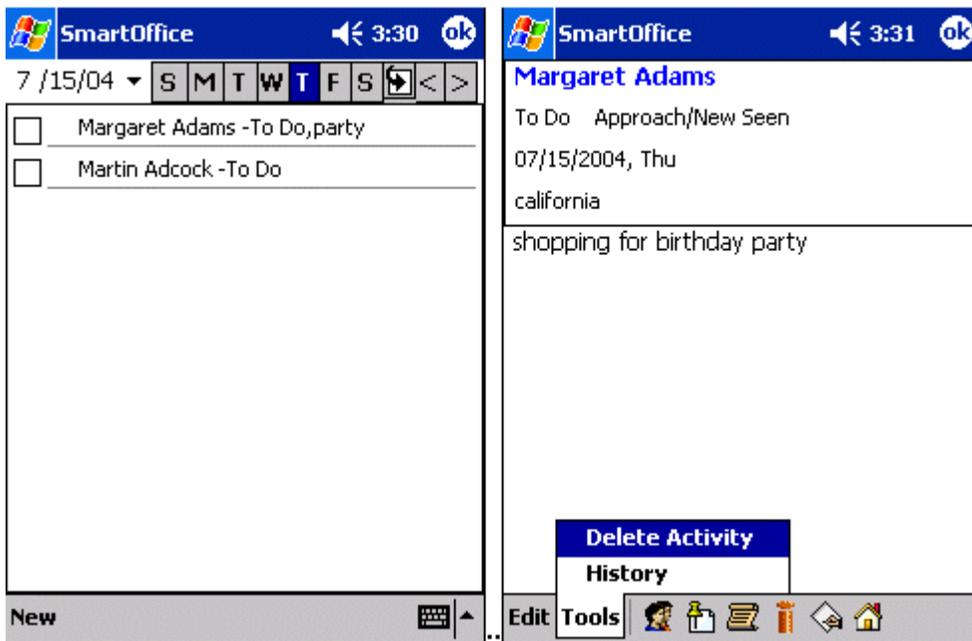
From the ToDo List tab

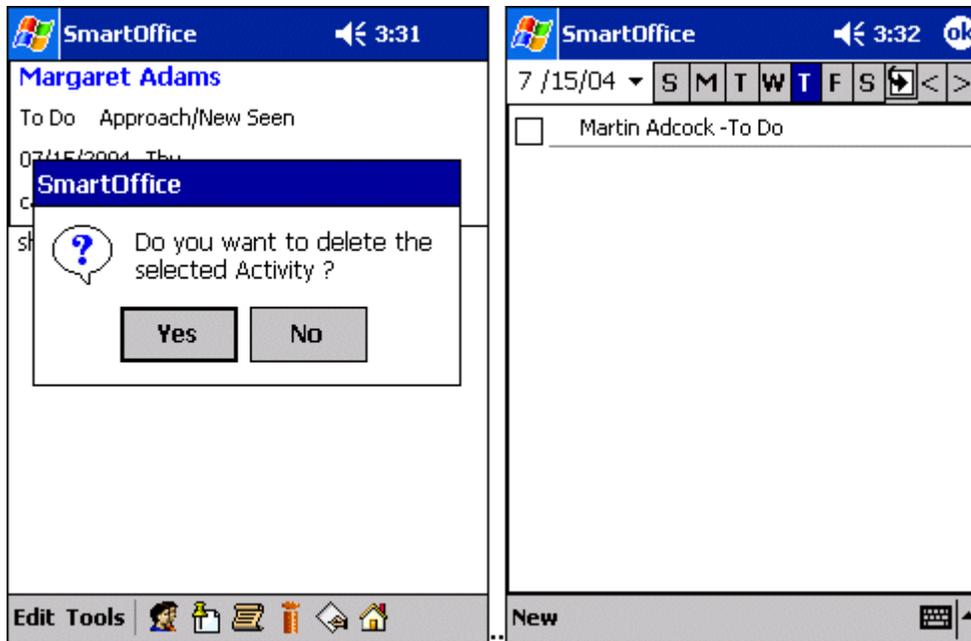
1. From the SmartOffice Mobile Main screen, select **ToDo's** to open the ToDo List, which shows all the ToDo's scheduled for the current date shown.
2. Hold the stylus down on a **ToDo** to open a menu with Edit, Delete, and Cancel options.
3. Select **Delete** to open a Delete Record confirmation message.
4. Tap **Yes** to delete the activity.



From the Activity Details tab

1. From the SmartOffice Mobile Main screen, select **ToDo's** to open the ToDo List, which shows all the ToDo's scheduled for the current date.
2. Tap a **ToDo** to be deleted, which displays the Activity Details tab in read-only mode.
3. Tap **Tools** and then select **Delete Activity** to open a Delete Record confirmation message box.
4. Tap **Yes** to delete the activity.





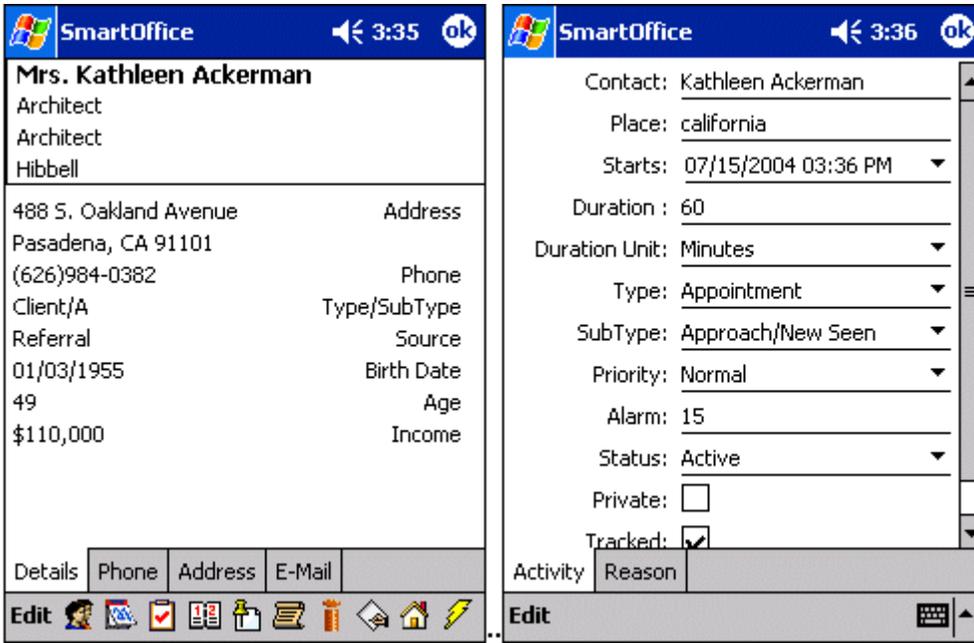
Activity Log

The Activity Log is a list of the activities linked to a particular contact that is used to display, add and modify activities.

Adding a Timed Activity from the Activity Log

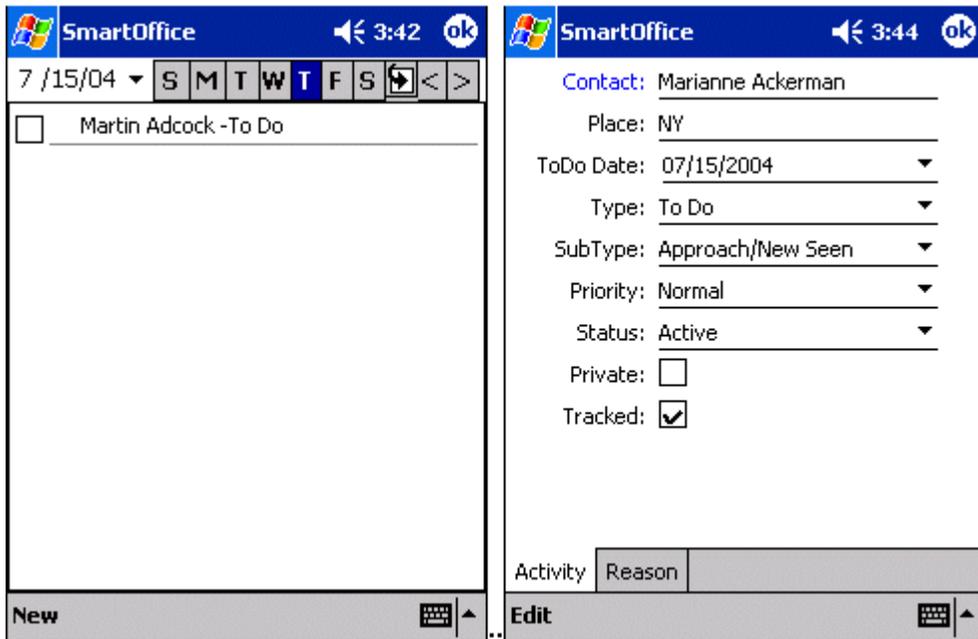
Adding an activity from either **Calendar** or **Activity Log** is nearly identical. The main difference is that when adding an activity from the **Activity Log**, it is linked to a Contact.

1. From the Contact Details tab, tap the **Activity Log** icon to open the **Activity Log** tab listing any existing activities for the selected Contact.
2. Tap **New** to open the **Activity Details** tab.
3. Enter the necessary information for the activity and tap **OK** to see the added activity on the **Activity Log** tab.



Adding an Non-timed Activity from ToDo

1. From the Contact Details tab, tap the **ToDo** icon to open the ToDo List tab.
2. Tap **New** to open the Activity Details tab.
3. Enter the necessary information for the activity and tap **OK** to see the added activity on the ToDo List tab.

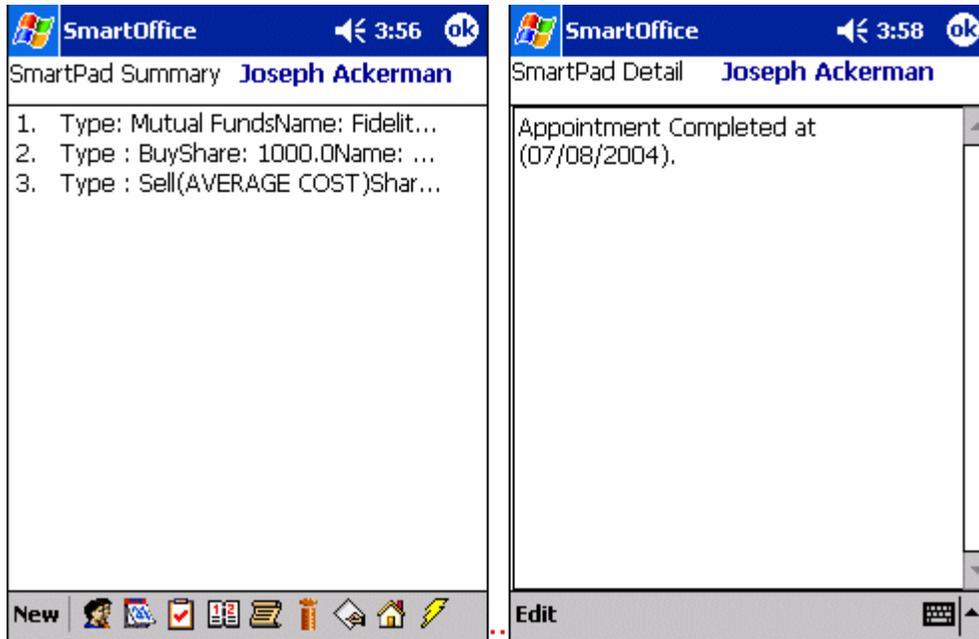


SmartPad

SmartOffice Mobile is used to view, add, and delete **SmartPad** records that are synchronized with the SmartOffice database. Note that only those **SmartPad** entries that are added with SmartOffice Mobile for Pocket PC® that are not synchronized with SmartOffice can be modified.

Adding a SmartPad Note

1. From the Contact Details tab, tap the **SmartPad** icon to open the **SmartPad Summary** tab listing any existing SmartPad entries for the selected Contact.
2. Tap **New** to open the **SmartPad Detail** tab.
3. Enter some notes and tap **OK** to see the added entry on the **SmartPad Summary** tab.



Deleting a SmartPad Note

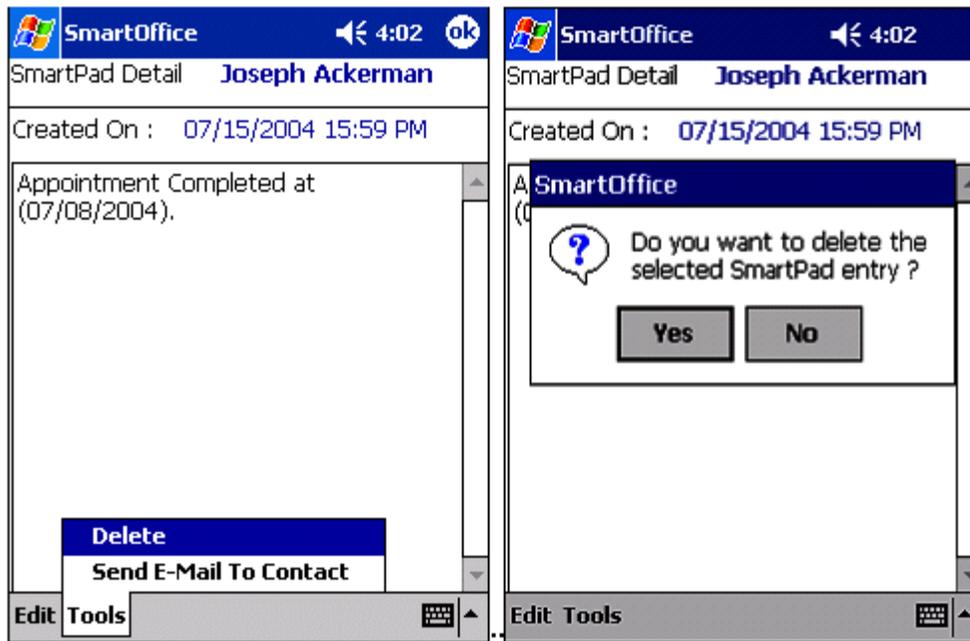
There are two ways to delete SmartPad Notes:

From SmartPad Summary:

1. From the Contact Details tab, tap the **SmartPad** icon to open the **SmartPad Summary** tab listing all the SmartPad entries for the selected Contact.
2. Tap and hold on the SmartPad entry to open a menu with Edit, Delete, and Cancel options.
3. Select **Delete** to open the Delete Record confirmation message box.
4. Tap **Yes** to delete the entry.

From SmartPad Detail screen:

1. From the Contact Details tab, tap the **SmartPad** icon to open the **SmartPad Summary** tab listing all the SmartPad entries for the selected Contact.
2. Tap on the entry to be deleted to open the **SmartPad Detail** tab.
3. Tap **Tools** and select **Delete** to display the Record Deletion Confirmation box.
4. Tap **Yes** to delete the entry.

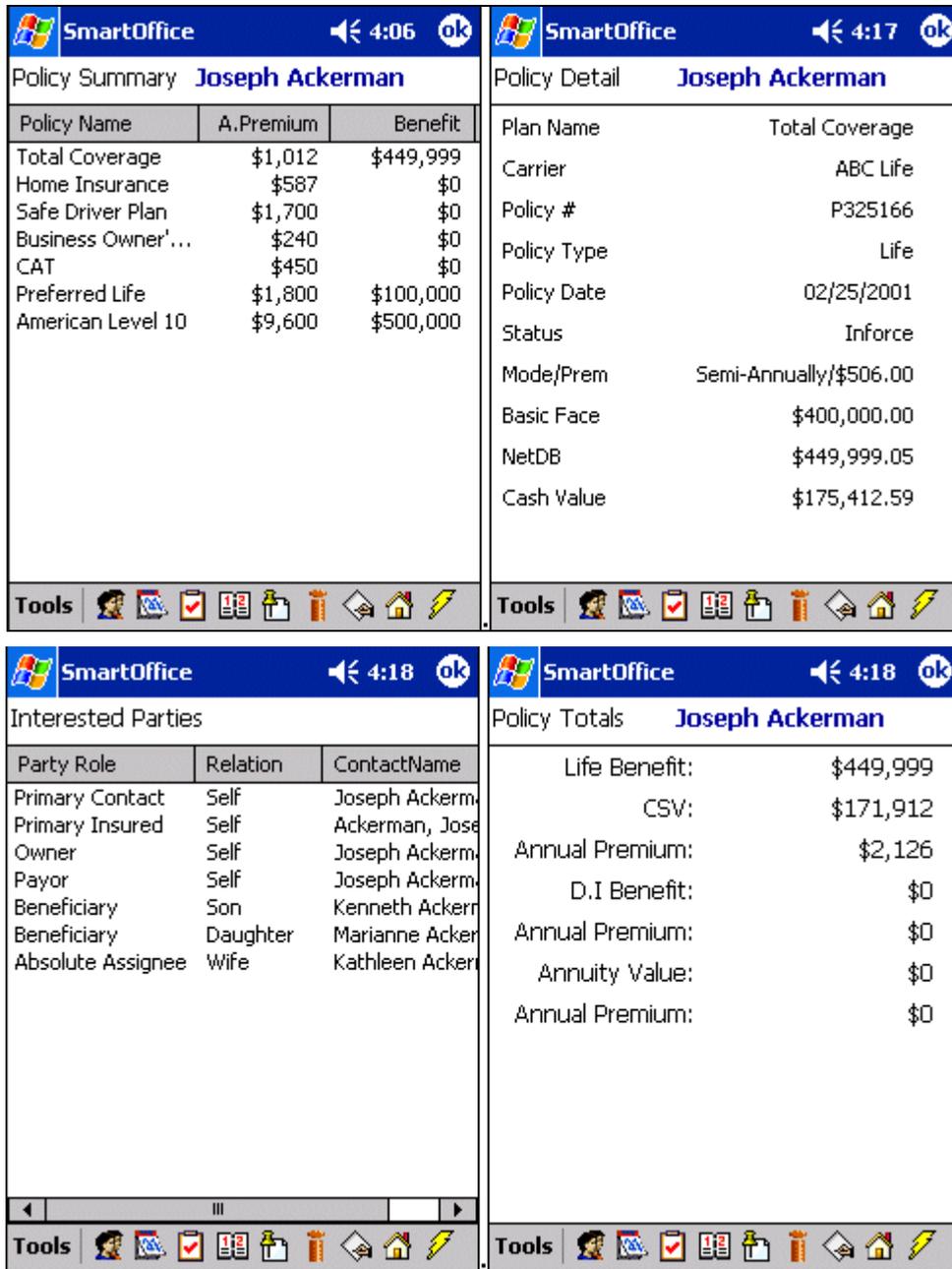


Policies

SmartOffice Mobile is used to display the **Policies**, **Policy Details**, **Interested Parties**, and **Policy Totals** tabs on the PDA. Please note that Policy information displayed here cannot be added, modified or deleted from the PDA. The information is read-only.

Accessing Policy Information

1. From the Contact Details tab, select the **Policy** icon to open the **Policy Summary** tab.
2. Tap the Policy Name to display the **Policy Detail** tab.
3. Tap **Tools** and select the **Show Interested Parties** option to display the **Interested Parties** tab.
4. Tap **OK** twice and then tap **Tools** to select the **Display Totals** option to display the **Policy Totals** tab.



Investments

SmartOffice Mobile can display the **Investment Summary**, **Investment Details**, and **Investment Totals** tabs on the PDA.

Note: The **Investment Details** tab is intended to display investments with share and cost information. The Variable Annuity information is limited due to this restriction. The investment information is read-only.

Accessing Investment Information

1. From the Contact Details tab, select the **Investment** icon to open the **Investment Summary** tab.
2. Tap the Investment Name to display the **Investment Details** tab.

3. Tap **OK** and then tap **Tools** to select the **Display Totals** option to display the **Investment Totals** tab.

SmartOffice 4:19 ok		SmartOffice 4:20 ok	
Investment Summary Joseph Ackerman		Investment Detail Joseph Ackerman	
Investment Name	Value	Security Type	Bonds
ATT 8.8 2010	\$138,339	Invest Name	ATT 8.8 2010
American Skandia	\$131,766	Account #	00234567956
General Electric Capital Corp.	\$44,655	Purchase Cost	\$129,999.99
Amgen Corporation	\$51,562	Tax Basis	\$129,999
Cash	\$60,000	Shares/Date	\$136,818.18 : 01/07/2004
AT&T	\$63,237	Price/Date	\$101.11 : 03/19/2004
Federal Natl Mtg Assn Mtn	\$80,143	Value	\$138,339
United States Treasury Bills	\$85,395		
American Funds U.S. Govt ...	\$17,402		
American High Yield	\$19,909		

SmartOffice 4:20 ok	
Investment Totals Joseph Ackerman	
Cost:	\$674,973
Tax:	\$447,378
Value:	\$692,413