

SmartOffice Mobile for Pocket PC User Guide Copyright 1998-2004, E-Z Data, Inc.

All Rights Reserved.

No part of this documentation may be copied, reproduced, or translated in any form without the prior written consent of E-Z Data, Inc.

All product names are trademarks of their respective manufacturers or organizations.



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 Revised: **7/29/2004** 

# **Table of Contents**

Introduction
Installing SmartOffice Mobile for Pocket PC® 1
Accessing SmartOffice Mobile on the Pocket PC® Device
Running SmartOffice Mobile for the First Time
Synchronization Options
Setting Up SmartOffice Mobile Synchronization Criteria
Preparing Data for Synchronization
SmartOffice Mobile Main Screen 10
Contacts
Creating an Individual Contact Record
Modifying a Contact Record16
Deleting a Contact Record 17
Creating a Business Contact Record 19
Modifying a Business Record
Deleting a Business Record
Calendar
AgendaView
DayView
WeekView
MonthView
Adding an Activity from the Calendar
Modifying an Activity from the Calendar
Deleting an Activity from the Calendar
ТоДо
Adding a ToDo Item
Modifying a ToDo Item
Deleting a ToDo
Activity Log
Adding a Timed Activity from the Activity Log
Adding an Non-timed Activity from ToDo 34
SmartPad
Policies
Investments

# 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.

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

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.

File Download 🛛 🗙			
?	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_ppc.exe		
	File type: Application		
	From: 192.168.2.57		
	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 S</u> ave Cancel <u>M</u> ore Info		
	${\overline{\!$		

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

	Add/Remove Programs
	Select a program's check box if you want to install it on your mobile device, or clear the check box if you want to remove the program from your device.
	Note: If a program that you installed is not listed, the program was not designed to be used on your mobile device.
Installing Applica	tions X
Install "E-Z Data I	nc. SmartOffice'' and other pending installations using the default application install directory?
	Yes <u>N</u> o Cancel
	Space available on device:
	Imstall program into the default installation folder
	Remove from both locations
	To remove the selected program from both your device and this computer, click Remove.
	OK Cancel <u>H</u> elp

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

🎢 Security Information 🛛 📢 6:01 🐽	🎢 Application Password 🛛 📢 6:03 🐽
SmartOffice Mobile	Enter security password. Password : ****** Confirm : *****
Enabling security on this device will encrypt the database and require a password whenever SmartOffice Mobile is accessed. Do you wish to enable security?	123 1 2 3 4 5 6 7 8 9 0 - = 🔶
Yes No	Tabqwertyuiop[]CAPasdfghjkl;'Shiftzxcvbnm,./ $\leftarrow$ Ctl<áü

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.

🎊 SmartOffice	📢 6:04 🛛 😣	🎊 SmartOffice	<b>∢</b> € 6:05 🛛 🐽
2 Contacts		Change security pas	sword
Calendar	0	Password :	
To Do	。 定	Confirm :	
	6		
-	ť		
	Ø		
Synchronize	- F /	123 1 2 3 4 5 6 7 8	90-=+
Sync Configuration		Tab q w e r t y u	i o p [ ]
Security Password	<u>n</u>	CAP a s d f g h j	k I ; '
10		Shift z x c v b n r	n / . / ←
About SmartOffice N	1obile	Ctl áü ` \	↓ ↑ ← →
New Tools 🔗			

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.

🎊 SmartOffice	<b>4</b> € 11:44 🛛 🐟	
Synchronization Options		
Office Name : C	arl	
User Name : a	idmin	
Password	*****	
	eOCS User	
MobiLin	k Server Details	
🕘 TCP	/ІР 🔾 НТТР	
	Web Server	
Host : 1	.92.168.2.171	
Port: 2	2447	
	<u></u>	

**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.

🥙 SmartOffice	×
Filter/Set Selection	
Select contacts to synchronize based on a filter or set.	
⊙ Filter ◯ Set	
Filter Clients: A-Clients	
OK	

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.

🖉 SmartOffice 🛛 🗙		
SmartOffice Mobile Device - Activity Selection		
Select the type and date range of activities to be synchronized.		
	Activity Type All C Timed	Activity Date Range Next 30 day(s) Previous 30 day(s)
< Back	Next > Fin	ish Cancel

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.

SmartOffice	×	
SmartOffice Mobile Device - SmartPad Selection		
Select the number of SmartPad entr	ies to download for each contact.	
	Specify SmartPad Downloading Options	
	1 2 3 4 5 6 7 8 9	
	SmartPad entries for last 3 months SmartPad Notes Only	
Warning: Downloading a large number of SmartPad entries can dramatically increase the time required to synchronize.		
< Back Next >	Finish Cancel	

6. 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.

🎒 Sma	rtOffice 🛛		
Smart	SmartOffice Mobile Device - Download Description		
Synchro	onization will be based on the selected criteria:		
	Selected Contacts.		
	"Clients: A-Clients" Filter has been selected.		
	<ul> <li>All Activities for the next 30 days and previous 30 days</li> </ul>		
	<ul> <li>Three SmartPad(s) per Contact.</li> </ul>		
1	To change the selection, click the Back button.		
4	Click the Finish button to save the Setup.		
< Ba	ck Next > Finish Cancel		

7. 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.

🖉 SmartOffice 🛛 🗙		
This menu updates the SmartOffice program on the mobile device. A Full Refresh updates all records based on the selection criteria. An Update will download all new and modified records to the device.		
Update Mobile Device with Changes		
C Update Mobile Device with new records and modifications Perform a full refresh of the data from SmartOffice		
OK Close		

- 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 🔰 🔰						
This menu updates the SmartOffice program on the mobile device. A Full Refresh updates all records based on the selection criteria. An Update will download all new and modified records to the device.						
Update Mobile Device with Changes						
Update Mobile Device with new records and modifications     Perform a full refresh of the data from SmartOffice						
OK Close						

# **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.

🎊 SmartOffice		•	🎊 SmartOffice	<b>∢</b> € 11:48 0	3
Personal <del>+</del>			Show +		٦
#ab cde fgh  ijk	Imn opg rst uvw >	(yz	Recent	Imn opg rst uvw xy	z
Abernathy,Brad	(626)522-1160		Personal	(626)522-1160	
Ackerman, Joseph	(626)799-2951	=	Business	(626)799-2951	=
Ackerman,Kathleen	(626)984-0382	П	All Contacts	(626)984-0382	
Ackerman,Kenneth	(626)555-1213			(626)555-1213	
Ackerman, Marianne			Ackerman, Marianne		
Adam, Chris			Adam, Chris		
Adams,Frank	(626)433-0928		Adams, Frank	(626)433-0928	
Adams, Margaret	(626)962-2032		Adams, Margaret	(626)962-2032	
Adams, William	(626)512-1231		Adams, William	(626)512-1231	
Adcock, Martin	(213)449-0771		Adcock, Martin	(213)449-0771	
Adcock, Sarah	(626)370-4410		Adcock,Sarah	(626)370-4410	
Afable, Patty	(626)555-1333x		Afable,Patty	(626)555-1333x	
Alexander,Felicia	(626)745-6598		Alexander, Felicia	(626)745-6598	
Alexander, Mark	(818)112-2311		Alexander, Mark	(818)112-2311	
Alexander, Sherman	(626)335-3334		Alexander, Sherman	(626)335-3334	
Alonzo,Helena	(626)555-3222x	-	Alonzo,Helena	(626)555-3222×	•
New	E	-	New		•

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.

🎊 SmartOffice	<b>4</b> € 11:49 <b>0</b>	3	🎊 SmartOffice	<b>∢</b> € 11:48 <b>0</b> 8
Personal <del>+</del>			Dr. Joseph Ackerman	
#ab cde fgh ijk	Imn opg rst uvw xy	/Z	Medical	
Ackerman, Joseph	(626)799-2951		Joseph M. Ackerman, M.D., J	inc.
Ackerman,Kathleen	(626)984-0382	=	144 Wilshire Blvd., Suite 250	Address
Ackerman,Kenneth	(626)555-1213		Los Angeles, CA 90007	
Ackerman, Marianne			(626)799-2951	Phone
Adam, Chris	((00)) (00) (0000)		JAckerman@bobbisnet.com	E-Mail
Adams, Frank Adams, Margariat	(626)433-0928		Client/A	Type/SubType
Adams, Maryared Adams William	(626)512-1231		Referral	Source
Adcock Martin	(213)449-0771		02/27/1950	Birth Date
Adcock,Sarah	(626)370-4410		54	Âne
Afable,Patty	(626)555-1333x		4375 000	Income
Alexander, Felicia	(626)745-6598		\$373,000	THEOHIE
Alexander, Mark	(818)112-2311			
Alexander,Sherman	(626)335-3334			
Alonzo,Helena	(626)555-3222x	-	Details Phone Address E-	Mail
New		-	Edit 🧟 🖾 📝 🏭 🏝 🖉	2 👖 🖗 🗂 🖉

• 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.

🎊 SmartOffice	📢 11:53 🐽	🏂 SmartOffice	<b>∢</b> € 11:54 🛛 🐼
All Contacts 🗸 🛛 p		All Contacts 🗸 👘	ack
#ab       cde       fgh       ijk       Imn         Pacifica Medical Facility,         Paladian, Alfred         Paladian, Mark         Parkinson, Pricilla         Patel, Vishwas         Peterson, Norma         Peterson, Shelly         Peterson, Sophia	opq         rst         uvw         xyz           (304)626-509         ▲           (464)455-0098         ▲           (800)335-1452         ▲           (636)823-0675         ▲           (800)335-1452         ▲           (636)823-0675         ▲           (800)335-1452         ▲           (626)542-3524         ↓           (704)647-8661         ▲	#ab cde fgh ijk Ackerman, Joseph Ackerman, Kathleen Ackerman, Kenneth Ackerman, Marianne	Imn opq rst uvw xyz (626)799-2951 (626)984-0382 (626)555-1213
Place Corporation Phoenix, Plato Tea Importance,	(323)699-6855		
123 1 2 3 4 5 6 7	890-=+	123 1 2 3 4 5	6 7 8 9 0 - = 🗲
Tab q w e r t y	u i o p [ ]	Tab q w e r t	yuiop[]
CAP a s d f g h	j k I ; '	CAP a s d f (	] h j k   ; '
Shift z x c v b n	<u> m / +</u>	Shift z x c v	b n m , . /  ←
Ctl áü ` \	↓ ↑ ← →	Ctl áü ` \	↓ ↑ ← →
New		New	

• 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'.

🎊 SmartOffice	<b>-</b> € 11:58	•	🏂 SmartOffice	<b>∢</b> € 11:58 @
Personal 🗸			Personal 🗸	
#ab cde fgh  ijk	Imn opg rst uvw	хуг	#ab cde fgh  ijk	Imn opq rst uvw xyz
Abernathy,Brad	(626)522-1160		Ansong,David	(310)799-2951
Ackerman, Joseph	(626)799-2951	=	Ansong,Deana	(626)552-2342
Ackerman,Kathleen	(626)984-0382		Ansong, Judy	(808)821-5718
Ackerman,Kenneth	(626)555-1213		Ansong,Lynn	(213)123-1324
Ackerman, Marianne			Anthony,Brian	(818)388-7111
Adam,Chris			Antille,Eugene	(310)237-4882
Adams,Frank	(626)433-0928		Antosen,Robert	(818)965-4455
Adams, Margaret	(626)962-2032		Arias,Emily	(213)555-4444×
Adams, William	(626)512-1231		Arliss, Jill	(373)355-0098
Adcock,Martin	(213)449-0771		Arreita, Amy	(626)991-2313
Adcock,Sarah	(626)370-4410		Arrieta, Michael	(626)557-8904
Afable,Patty	(626)555-1333x		Arrieta,Sandy	(562)698-5674
Alexander,Felicia	(626)745-6598		Arron, John	(213)987-0984
Alexander,Mark	(818)112-2311		Ashcroft, Michael	(213)585-6945
Alexander,Sherman	(626)335-3334		Ashton, Jennifer	(800)365-6521
Alonzo,Helena	(626)555-3222×	-	Badinas,Samuel	(213)555-3555x
New	E	≝ ^	New	▲   

### **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.

🎊 SmartOffice 🚽	€ 12:07	<b>o</b> k	🎊 SmartOffic	te <b>4</b> € 12:08 (	•
			Contact Type:	Client	
Select the type of contac	t to		Sub Type:	A	
be added from the followi	ng		Title:	Dr.	
options.			Name:	Ackerman, Joseph 🔹 🔻	
Individual			Suffix:		
			Greeting:	Joe	
			Employer:	Joseph M. Ackerman, M	
			Source:	Referral	
UK Close			Sub-Source :		
			Job Title:	Chief Of Staff	
			Birth Date:	02/27/1950 🔹	- -
			Age:	54	•
			Details Phone	Address E-Mail	
	E	≝ ^	Edit Tools		-
SmartOffice Dr. Joseph Ackerman Chief Of Staff Medical Joseph M. Ackerman, M.D., Inc.	€ 12:10	<b>0</b> 2			
144 Wilshire Blvd., Suite 250	Addr	ess			
Los Angeles, CA 90007					
(626)799-2951 JAckerman@bobbispet.com	PD F-	one Mail			
Client/A T	ype/SubT	уре			
Referral	Sou	irce			
02/27/1950	Birth D	ate			
54		Age			
\$375,000	Inco	ome			

#### 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.

🎊 SmartOff	ìce	<b>∢</b> € 12:14 (	ß	🎊 Smarti	Office	2	4	€ 12:15	•
Phone Summ	ary <mark>Margaret</mark>	Adams		Phone Det	ails	Marg	aret A	dams	
Residence Fax Business	(626)962-20 (626)585-3550 (626)987-7288	32		Type: Area Code: Dial Number: Extension: Remarks : Preferred:	: Resi : 626 : 962 : : :	-2032			►
Details Phone	Address E-Ma	ail		Details Pho	ne A	ddress	E-Mail		
New 🕵 💽	2 🕮 🏠 📃	🍈 🏟 🚮 .	1	Edit Tools				E	≝ ^

#### **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.
- 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.

🎊 Smart(	Office 📢	12:17 🐽	🎊 SmartO	fice	◀€ 12:19	•
Address Su	mmary Margaret A	dams	Address Det	ails <mark>Ma</mark> i	rgaret Adams	
Residence Business	2314 Ash Drive Monterey Park, CA 987 E. 21st Street Los Angeles, CA 90024	91754 †	Address Type Line 1 Line 2 Line 3 City State	Residence 2314 Ash Monterey CA	) Drive Park	► 
Details Pho	ne Address E-Mail		Country Zip Remarks Preferred Details Phone	91754	E-Mail	_
New 🕵 🔯	. 🖸 🕮 🏠 🗷 🎁	🏟 🚮 🕖 .	Edit Tools		 	<b>a</b>

#### **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.
- Enter the remaining address information in the Address field.
   Note: The preferred E-mail/Web Site is displayed on the Contact Details tab.

🎊 SmartOffice	◀€ 12:21	•	🏂 Smai	rtOffi	e	-	€ 12:21	•
E-Mail Summary Margaret	t Adams		E-Mail Det	tail	Marga	ret Ac	lams	
E-Mail margaret_adar Web Site www.wisadam.cor	ns4demo n		Type Address Preferred	:: E-M. :: mar 1: 🔽	ail garet_ada	ms4den	no@hotm	•
Details Phone Address E-			Details Pr	hone	Address	E-Mail		
New 🕵 墜 🗹 🏥 🏪 🗏	2 👖 😪 🖆	12	Edit Tools	5			Ē	≝ ^

### **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.

🎊 SmartOffice	<b>∢</b> € 12:13 🐽	🎊 SmartOffice	◀€ 12:12 🐽
Mrs. Margaret Adams		Contact Type: C	ilient 🔻 🔺
Accounting Department		Sub Type: B	;
Real Estate Ace Building		Title: N	Ars.
2314 Ash Drive	Address	Name: A	Adams, Margaret 🔹
Monterey Park, CA 91754		Suffix:	_
(626)962-2032	Phone	Greeting: N	1argaret
margaret_adams4demo@n   Client/B	E-Mail Type/SubType	Employer: A	Ace Building
Referral	Source	Source: R	teferral
03/19/1942	Birth Date	Sub-Source :	
62 #32,000	Age	Job Title: A	Accounting Department
\$52,000	Income	Birth Date: (	)3/19/1942 🔻
		Age: 6	j2
Details Phone Address E-M	1ail	Details Phone A	ddress E-Mail
Edit 🕵 🔯 🖓 🔢 🏠 🗮	🍈 🏟 🗂 🖉	Edit Tools	<b>⊷</b>

### 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.

🏂 SmartOffic	e <b>≼</b> € 12:33	0	D	🎊 Sn	nartOffi	ce		(12:33	
Contact Type:	Client	•	•	Conta	act Type	Client			-
Sub Type:	В			s	ub Type	: В			
Title:	Mrs.			0	Tible	bdu a			
Name:	Adams, Margaret	•		Sma	rtumic	9			
Suffix:			_	🤦	) Do	you wan	t to de	lete the	=
Greeting:	Margaret			$   \leq$	r⁄ sele	cted Cor	ntact ei	ntry ?	
Employer:	Ace Building				Y	es	No		
Source:	Referral								
Sub-Source :				Sub	-Source				
Job Title:	Accounting Department				Job Title	Account	ing Depa	artment	
Birth Date:	03/19/1942	•		Bi	rth Date	03/19/1	942	•	-
Delete			•		Age	62			-
Deta Send E-r	mail to Contact			Details	Phone	Address	E-Mail		
Edit Tools	1		-	Edit To	ols				-

#### **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.

🎊 SmartOffi	ice 📢	5:20 🐽	) 🎊 SmartOffice 🛛 📢 5:22
Phone Summa	ary Margaret Ada	ns	Phone Details Margaret Adams
Residence Residence Fax Business	(626)962-2032 (626)585-3550 (626)987-7288		Type: Residence   SmartOffice  D Do you want to delete the selected phone number ?  Yes No
Details Phone	Address E-Mail		Details Phone Address E-Mail
New 🧟 🔯 星	2 🖽 🏝 🗾 🧍	à 🚮 🖉 .	Edit Tools

### **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.

🎊 SmartO	ffice <b>√</b> € 5	:27 🐽	🏂 Sm	artOffi	ce	-	€ 5:28	
Address Sun	nmary Margaret Ada	ims	Addres	s Detail	s Mar	garet	Adams	
<b>Residence</b> Business	2314 Ash Drive Monterey Park, CA 91 987 E. 21st Street Los Angeles, CA 90024	754	Address Smar ? ? Rer Pref	; Type: •tOffice Do curr Do curr P varner , r Zip: marks : ferred:	Residence you wan rent addr es	t to de ress ? No	lete the	
Details Phon	e Address E-Mail		Details	Phone	Address	E-Mail		
New 🕵 陸	🖸 💷 🏪 🗷 📋 🦃	a 🚮 🖉	Edit To	ols				•

#### **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.

🍠 SmartOffice	윤 SmartOffice
E-Mail Detail Margaret Adams	E-Mail Detail Margaret Adams
Type: E-Mail  Address: margaret_adams4demo@hotm Preferred:	Type: E-Mail    SmartOffice   Do you want to delete the selected Webaddress ?   Yes No
Delete	
Deta Send E-mail to Contact	Details Phone Address E-Mail
Edit Tools	Edit Tools

### 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.

🎊 SmartOffice	<b>4</b> € 2:16	ø	🎊 SmartOffi	ce 🗖	€ 2:17	6	3
			Туре:			•	•
Select the type of cont	act to		Name:	ABC Life			
be added from the follo	wing		Source:				
options.			Industry:			•	
🔵 Individual			Class:			▾	
Business			Employees:	150			=
			Revenue:	\$0.00			
	1		Est. Date:			•	
UK Close			Prim Contact:	Monica Scott			
			Income				
			Tax:				
			<u>SIC</u> # :			_	•
			Details Phone	Address E-Mail			
	E	≝ ^	Edit Tools		E	3	•
ABC Life							
950 S. Pepper St	Addr	ess					
P.O. Box 950							
(323)466-8989	Phi						
http://www.apal.com	E-I	Mail					
Monica Scott	Prim Cont	tact					
Details Phone Address E-M	ail						
Edit 🧟 🗟 🖓 🔡 🏪 🧟	🍈 🏟 🚮	1					

#### 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 <u>Contact E-mail</u> 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 <u>Modifying a Contact Record</u> 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 <u>Modifying a Contact's Phone Number</u> 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.

87	Sm	art(	Offic	ce					۲	÷2	2:28	(	ß
Jul	15	04	•	s	Μ	T	w	T	F	s	•	<	>
C	hris	tine	Ba	rna	aby	<b>-</b> 1	To C	)0					
- 02	2:28	PM -	60	Mi	nute	es							
K	enn	eth	Acl	œ	ma	an-	· Ap	ppo	oin	tm	ent		
- 03	3:00	PM -	60	Mi	nute	es							_
New	Ξ												

### 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.

27	SmartOffice 🛛 📢 2:29 🔇	ß
Jul	15 04 🔻 S M T W T F S 💽 <	>
6		
7		
8		
9		
10		
11		
12		
1		
2	Christine Barnaby	
3	Kenneth Ackerman,Meeting	
4		=
5		
6		
7		
8		
9		
10		-
11		
New		

### 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.

🎊 S	imart(	€ 2:3	1 🐽			
Ju	ily	2004			- [	≥<>
S	Μ	Т	W	Т	F	S
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7
New	=, 🛄					

### 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.

🎊 SmartOffic	:e <b>┥</b> € 2:34	<b>0</b> 2	🏂 SmartOffice 🛛 📢 2:36 🐽
Contact:	Frank Adams	-	Subject
Place:	Green street		business lunch
Starts:	07/15/2004 12:00 PM	•	
Duration :	60		Activity Reason
Duration Unit:	Minutes	•	Meeting with client to discuss
Туре:	Appointment	▼ =	about new insurance policies
SubType:	Approach/New Seen	<u>•</u>	
Priority:	Normal	-	
Alarm:	15		
Status:	Active	-	
Private:			· ·
Tracked:	¥	-	
Activity Reason			Activity Reason
Edit		<b>m</b>	Edit 🔤 🗖

### 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.

🎊 SmartOffice	📢 2:39 🛛 🐽	🏂 SmartOffic	:e 📢 2:40 🐠
Jul 15 04 Edit	T F S 💽 < >	Contact:	Adams Frank
Frank Ada	nent	Place:	Green street
12:00 PM - 6 Cancel	iness lunch	Starts:	07/15/2004 12:00 PM 🛛 🔻
02:28 PM - 60 Minutes	00	Duration :	60
Kenneth Ackerman- A	ppointment	Duration Unit:	Minutes 🔹
03:00 PM - 60 Minutes		Type:	Appointment 🔻 =
		SubType:	Approach/New Seen 🔹
		Priority:	Normal 🔹
		Alarm:	15
		Status:	Active 🔻
		Private:	
		Tracked:	<b>₽</b>
		Activity Reason	History
New 📃 🛄 🛄		Edit Tools	₩ *

### 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.

🎢 SmartOffice 🛛 📢 2:40 🐽	🏄 SmartOffice 🛛 📢 2:4	0 🐟
Frank Adams	Contact: Adams Frank	
Appointment Approach/New Seen	Place: Green street	
07/15/2004 12:00 PM - 60 Minutes	Starts: 07/15/2004 12:00 PM	•
Green street	Duration : 60	
Meeting with client to discuss about new	Duration Unit: Minutes	-
	Type: Appointment	- =
	SubType: Approach/New Seen	<b>•</b>
	Priority: Normal	<b>-</b>
	Alarm: 15	
	Status: Active	•
	Private:	
	Tracked:	-
	Activity Reason History	
Edit Tools 🕵 🎦 🗮 👔 🍛 🚮	Edit Tools	

### 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.

🎊 SmartOffice 🛛 📢 2:45 🐽	🎢 SmartOffice 🛛 📢 2:46 🐽
Jul 15 04 - SMTWTFS - <>	Frank Adams
Frank Adams- Appointment	Appointment Approach/New Seen
12:00 PM - 60 Minutes, business lunch	07/15/2004 12:00 PM - 60 Minutes
Christine Barnaby- To Do	Green street
02:28 PM - 60 Minutes	
Kenneth Ackerman- Appointment	Meeting with client to discuss about new
03:00 PM - 60 Minutes	in our anice policies
	Delete Activity
	History
Nou -	
new 💷 🛄 🛄	cuit   100is   🌃 💾 🛃 📙 😪 🚹
	M Consult Office
SmartOffice ◀€ 2:46	SmartOffice
SmartOffice ◀€ 2:46 Frank Adams	SmartOffice         Image: Constraint of the second s
SmartOffice < 2:46 Frank Adams Appointment Approach/New Seen	SmartOffice         ↓<
SmartOffice ◀< 2:46 Frank Adams Appointment Approach/New Seen 07/15/2004 12:00 DM _60 Misutes	SmartOffice         ↓<
SmartOffice ◀€ 2:46 Frank Adams Appointment Approach/New Seen 07/15/2004 12:00 DM _60 Misutes G	SmartOffice         Image: Construction of the second
SmartOffice     ◄ € 2:46       Frank Adams       Appointment     Approach/New Seen       07/15/2004     12:00 PM       G     SmartOffice       M     Do you want to delete the	SmartOffice       Image: Construction of the second state of the
SmartOffice       Image: 2:46         Frank Adams       Appointment       Approach/New Seen         07/15/2004 12:00 DM       60 Misutes         SmartOffice       SmartOffice         M       O you want to delete the relevant selected Activity ?	SmartOffice       ↓<       2:47       ↓         Jul       15 04       ▼       S       M       T       W       T       F       S       <       >         Christine Barnaby- To Do       02:28 PM - 60 Minutes           >        >       <
SmartOffice     ↓€ 2:46       Frank Adams       Appointment     Approach/New Seen       07/15/2004 12:00 DM     60 Misutes       G     SmartOffice       M     ?       Do you want to delete the selected Activity ?	SmartOffice       ↓ € 2:47         Jul       15 04       ▼       S M T W T F S       ● < >         Christine Barnaby- To Do       02:28 PM - 60 Minutes         Kenneth Ackerman- Appointment       03:00 PM - 60 Minutes
SmartOffice       ✓ € 2:46         Frank Adams         Appointment       Approach/New Seen         07/15/2004 12:00 DM       €0 Misutes         G       SmartOffice         M       ①         Do you want to delete the selected Activity ?         Yes       No	SmartOffice <ul> <li></li></ul>
SmartOffice             Frank Adams         Appointment       Approach/New Seen         07/15/2004       12/00 DM       60 Mieutec         SmartOffice           M         Do you want to delete the / selected Activity ?          Yes       No	SmartOffice <ul> <li>€ 2:47</li> <li>Jul 15 04</li> <li>SMTWTFS</li> <li>E&lt;</li> </ul> Christine Barnaby- To Do         02:28 PM - 60 Minutes           Kenneth Ackerman- Appointment           03:00 PM - 60 Minutes
SmartOffice       Image: 2:46         Frank Adams       Appointment Approach/New Seen         07/15/2004 12:00 DM _ 60 Misutec       SmartOffice         G       SmartOffice         M       Image: Do you want to delete the selected Activity ?         Yes       No	SmartOffice <ul> <li></li></ul>
SmartOffice       ✓ € 2:46         Frank Adams         Appointment       Approach/New Seen         07/15/2004 12:00 DM       €0 Misutes         G       SmartOffice         M       ①         Do you want to delete the selected Activity ?         Yes       No	SmartOffice   Jul 15 04   SMTWTFS   Christine Barnaby- To Do   02:28 PM - 60 Minutes   Kenneth Ackerman- Appointment   03:00 PM - 60 Minutes
SmartOffice       ✓ € 2:46         Frank Adams         Appointment       Approach/New Seen         07/15/2004 12:00 DM       60 Miewtec         G       SmartOffice         M       ?         Do you want to delete the selected Activity ?         Yes       No	SmartOffice <ul> <li></li></ul>
SmartOffice             Frank Adams         Appointment       Approach/New Seen         07/15/2004       12/00 DM       60 Mieutoc         GmartOffice           M         Do you want to delete the selected Activity ?          Yes       No	SmartOffice <ul> <li></li></ul>
SmartOffice       Image: Constraint of the second sec	SmartOffice     Jul 15 04     SMTWTFS      Christine Barnaby- To Do   02:28 PM - 60 Minutes   Kenneth Ackerman- Appointment   03:00 PM - 60 Minutes
SmartOffice             Frank Adams         Appointment       Approach/New Seen         07/15/2004       12:00 DM       60 Miewter         SmartOffice           M         Do you want to delete the selected Activity ?          Yes       No	SmartOffice     Jul 15 04     SMTWTFS      Christine Barnaby- To Do   02:28 PM - 60 Minutes   Kenneth Ackerman- Appointment 03:00 PM - 60 Minutes

### 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.

🎢 SmartOffice 🔹	€ 2:53	❹}	<i>8</i> 7	SmartO	Iffice	<b>4</b> € 2:53	0	3
Christine Barnaby				Conta	ct: Barnaby Christ	ine		•
To Do Approach/New Seen				Plac	ce: new york			
07/15/2004 02:28 PM - 60 Minute	s			Star	ts: 07/15/2004 02	2:28 PM	•	
new york				Duratio	n:60			
			Du	uration Ur	nit: Minutes		•	
				Тур	be: To Do		•	=
				SubTyp	be: Approach/New	Seen	•	
				Priori	ty: Normal		•	
				Alar	rm: 15			
				State	us: Active		•	
				Prival	te: 🗌			
				Delet	te			•
			Activ	Send	E-mail to Conta	ct		
Edit Tools 🙎 🎦 🧮 🌾	a 🚮		Edit	Tools		E	≣ŀ	•
SmartOffice Contact: Barnaby Christin Place: new york SmartOffice Ob you want to de selected Activity ? Yes No Alarm: 15 Status: Active	<b>₹</b> 2:54 le							
Private:								
Tracked: 🖌 Activity Reason History		-						
Edit Tools	E	₩ ~						

# 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.

🎊 SmartOffice	<b>4</b> € 2:57	۵	🎊 SmartOffice 🛛 ┥	é 2:58 🛛 🐽
Contact: Margaret Adam	s		Subject	
Place: california			narty	7
ToDo Date: 07/15/2004	-		Antivity Deserve	
Type: <u>To Do</u>	•		Activity Reason	
SubType: <u>Approach/New</u> :	Seen 🔻		shopping for birthday party	-
Priority: Normal	•			
Status: Active	•			
Private:				
Tracked: 🔽				
				-
Activity Reason			Activity Reason	
Edit	æ	ଆ^	Edit	- E
🎊 SmartOffice	<b>-</b> € 3:01	<b>d</b> 2		
7 /15/04 - SMTWT	FS -<			
Margaret Adams -To Do	party			
New	E	\$ ^		

### 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.

🎊 SmartOffice	<b>4</b> € 3:17	•	🎊 SmartO	ffice	◀€ 3:18	•
Margaret Adams			Contact:	Adams Margaret		
To Do Approach/New Seen			Place:	california		_
07/15/2004, Thu			ToDo Date:	07/15/2004	•	•
california			Туре:	To Do	•	•
shopping for birthday party			SubType:	Approach/New S	ieen .	•
			Priority:	Normal	•	•
			Status:	Active	•	-
			Private:			_
			Tracked:			
			Activity Reas	on History		
Edit Tools 🧟 🕆 📃 👖	la 🔂		Edit Tools		E	▲

### **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.

SmartOffice Edit 43:19	•	🎊 SmartOffice 🛛 📢 3:24
7 /15/04 🔻 S M Delete S 💽	< >	7 /15/04 - SMTWTFS
Margaret Adat Cancel Y		Margaret Adams -To Do, party
Martin Adcock -To Do		SmartOffice –
		Do you want to delete the selected Activity ?
		Yes No
New	≝ ^	New 🖽 🔺

#### 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.



🎊 SmartOffice	<i>ff</i> SmartOffice 🛛 📢 3:32 🐽
Margaret Adams	7 /15/04 - SMTWTFS - >
To Do Approach/New Seen	Martin Adcock -To Do
O7/15/2004_Tbu SmartOffice	
st ? Do you want to delete the selected Activity ?	
Yes No	
Edit Tools 🕱 🛅 🗟 👖 🖓 🚮	New 🖽 🔺

# **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.

🎊 SmartOffice	<b>-</b> € 3:35	ß	🎊 SmartOffic	:e <b>√</b> € 3:36	•
Mrs. Kathleen Ackerman	l		Contact:	Kathleen Ackerman	<b></b>
Architect			Place:	california	
Hibbell			Starts:	07/15/2004 03:36 PM	•
488 S. Oakland Avenue	Addres	s	Duration :	60	
Pasadena, CA 91101			Duration Unit:	Minutes	•
(626)984-0382	Phon: Tura/SubTura	e	Туре:	Appointment	- =
Referral	Source		SubType:	Approach/New Seen	-
01/03/1955	Birth Date	e	Priority:	Normal	-
49	Age -	e	Alarm:	15	
\$110,000	Incom	e	Status:	Active	-
			Private:		
			T <u>racked:</u>		-
Details Phone Address E-M	ail		Activity Reason		
Edit 🧟 🔯 📝 🔠 着 🧮	🍈 🏟 🚮 🌶	7	Edit	E	=

### 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.

🎊 SmartOffice	<b>4</b> € 3:42 🐽	🏂 SmartOf	fice 🔫 📢 3:44 🐽
7 /15/04 🔻 S M T W T	F S 💽 < >	Contact:	Marianne Ackerman
Martin Adcock -To Do		Place:	NY
		ToDo Date:	07/15/2004 💌
		Туре:	To Do 💌
		SubType:	Approach/New Seen 📃 💌
		Priority:	Normal 🗾
		Status:	Active 💌
		Private:	
		Tracked:	✓
		Activity Reas	ion
New	<b>₩</b>	Edit	<b>₩</b>

### **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.

25 SmartOffice		<b>4</b> € 4:06 🛛 🔂	🏂 SmartOffi	ce 🛛 📢 4:17 🐽
Policy Summary	Joseph Ack	erman	Policy Detail	Joseph Ackerman
Policy Name	A.Premium	Benefit	Plan Name	Total Coverage
Total Coverage	\$1,012 ¢587	\$449,999 ¢0	Carrier	ABC Life
Safe Driver Plan	\$1,700	\$0 \$0	Policy #	P325166
Business Owner'	\$240 \$450	\$0 ≰∩	Policy Type	Life
Preferred Life	\$1,800	\$100,000	Policy Date	02/25/2001
American Level 10	\$9,600	\$500,000	Status	Inforce
			Mode/Prem	Semi-Annually/\$506.00
			Basic Face	\$400,000.00
			NetDB	\$449,999.05
			Cash Value	\$175,412.59
Tools  🕵 💆	) 💷 街 👖	la 🖞 🖉	Tools 🤵 🕵	🖻 🕮 🏪 🔋 🏟 🖨 🖉
26 Smarcomce		4:18 🐽	🎊 SmartOffi	ce 🛛 📢 4:18 🐽
Interested Parties	5	<b>4</b> € 4:18 🔞	Bolicy Totals	ce 📢 4:18 🐽 Joseph Ackerman
Interested Parties	Relation	<b>∢€ 4:18</b> ContactName	Policy Totals Life Ben	ce
Interested Parties Party Role Primary Contact Demographics	Relation	<b>4€ 4:18</b> ContactName Joseph Ackerm. Ackerman. Jack	Policy Totals Life Ben C	ce
Party Role Primary Contact Primary Insured Owner	Relation Self Self Self Self	ContactName Joseph Ackerm Ackerman, Jose Joseph Ackerm	Policy Totals Life Ben C Annual Premi	ce         ↓€ 4:18         ⊕           Joseph Ackerman            efit:         \$449,999           ISV:         \$171,912           um:         \$2,126
Interested Parties Party Role Primary Contact Primary Insured Owner Payor Payor Payor	Relation Self Self Self Self Self	ContactName Joseph Ackerm Ackerman, Jose Joseph Ackerm Joseph Ackerm	Policy Totals Life Ben C Annual Premi D.I Ben	ce         Image:          Image: <thimage: <="" th="">         Image:          Ima</thimage:>
Interested Parties Party Role Primary Contact Primary Insured Owner Payor Beneficiary Beneficiary	Relation Self Self Self Self Self Self Son Daughter	ContactName Joseph Ackerm Ackerman, Jose Joseph Ackerm Joseph Ackerm Kenneth Ackerr Marianne Acker	Policy Totals Life Ben C Annual Premi D.I Ben Annual Premi	ce         ↓€ 4:18         ↓           Joseph Ackerman             efit:         \$449,999            ISV:         \$171,912            um:         \$2,126            efit:         \$0            um:         \$2
Interested Parties Party Role Primary Contact Primary Insured Owner Payor Beneficiary Beneficiary Absolute Assignee	Relation Self Self Self Self Self Son Daughter Wife	ContactName Joseph Ackerm Ackerman, Jose Joseph Ackerm Joseph Ackerm Kenneth Ackerr Marianne Acker Kathleen Acker	Policy Totals Life Ben C Annual Premi D.I Ben Annual Premi Annual Premi	ce     ↓€ 4:18     ↓       Joseph Ackerman       efit:     \$449,999       CSV:     \$171,912       um:     \$2,126       efit:     \$0       um:     \$0       uum:     \$0       uum:     \$0
Interested Parties Party Role Primary Contact Primary Insured Owner Payor Beneficiary Beneficiary Absolute Assignee	Relation Self Self Self Self Self Son Daughter Wife	ContactName Joseph Ackerm Ackerman, Jose Joseph Ackerm Joseph Ackerm Kenneth Ackerr Marianne Ackerr Kathleen Ackerr	Policy Totals Life Ben C Annual Premi D.I Ben Annual Premi Annuity Va Annual Premi	Ioseph Ackerman           efit:         \$449,999           SV:         \$171,912           um:         \$2,126           efit:         \$0           um:         \$0           um:         \$0           um:         \$0           um:         \$0           um:         \$0           um:         \$0
Interested Parties Party Role Primary Contact Primary Insured Owner Payor Beneficiary Beneficiary Absolute Assignee	Relation Self Self Self Self Son Daughter Wife	ContactName Joseph Ackerm Ackerman, Jose Joseph Ackerm Joseph Ackerm Kenneth Ackerr Marianne Acker Kathleen Acker	Policy Totals Life Ben C Annual Premi D.I Ben Annual Premi Annuity Va Annual Premi	Image: ce           <
Interested Parties Party Role Primary Contact Primary Insured Owner Payor Beneficiary Beneficiary Absolute Assignee	Relation Self Self Self Self Son Daughter Wife	ContactName Joseph Ackerm Ackerman, Jose Joseph Ackerm Joseph Ackerm Kenneth Ackerr Marianne Acker Kathleen Acker	Policy Totals Life Benn C Annual Premi D.I Benn Annual Premi Annual Premi Annual Premi	ce     ↓€ 4:18     ↓       Joseph Ackerman       efit:     \$449,999       CSV:     \$171,912       um:     \$2,126       efit:     \$0       um:     \$0       um:     \$0       um:     \$0       um:     \$0
Interested Parties Party Role Primary Contact Primary Insured Owner Payor Beneficiary Beneficiary Absolute Assignee	Relation Self Self Self Self Son Daughter Wife	ContactName Joseph Ackerm Ackerman, Jose Joseph Ackerm Joseph Ackerm Kenneth Ackerr Marianne Ackerr Kathleen Ackern	Policy Totals Life Ben C Annual Premi D.I Ben Annual Premi Annuity Va Annual Premi	ce     ↓€ 4:18     ↓       Joseph Ackerman       efit:     \$449,999       ISV:     \$171,912       um:     \$2,126       efit:     \$0       um:     \$0       um:     \$0       um:     \$0       um:     \$0
Interested Parties Party Role Primary Contact Primary Insured Owner Payor Beneficiary Beneficiary Absolute Assignee	Relation Self Self Self Self Son Daughter Wife	ContactName Joseph Ackerm Ackerman, Jose Joseph Ackerm Joseph Ackerm Kenneth Ackern Marianne Ackern Kathleen Ackern	Policy Totals Life Benn C Annual Premi D.I Benn Annual Premi Annual Premi Annual Premi	ce     ↓€ 4:18     ↓       Joseph Ackerman       efit:     \$449,999       CSV:     \$171,912       um:     \$2,126       efit:     \$0       um:     \$2       um:     \$0       um:     \$0       um:     \$0       um:     \$0

### 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 🐽	🎊 SmartOffice	<b>∢</b> € 4:20 🐽
Investment Summary Jos	eph Ackerman	Investment Detail	Joseph Ackerman
Investment Name	Value	Security Type	Bonds
ATT 8.8 2010 American Skandia	\$138,339 \$131,766	Invest Name	ATT 8.8 2010
General Electric Capital Corp.	\$44,655	Account #	00234567956
Amgen Corporation	\$51,562 #60,000	Purchase Cost	\$129,999.99
AT&T	\$63,237	Tax Basis	\$129,999
Federal Nati Mtg Assn Mtn United States Treasury Pills	\$80,143 #85,205	Shares/Date \$1	36,818.18 : 01/07/2004
American Funds U.S. Govt	\$17,402	Price/Date	\$101.11:03/19/2004
American High Yield	\$19,909	Value	\$138,339
Tools 🧟 💽 🔢 🏪	2447	Tools 🕵 💽	H 🗄 🗖 🖗 🖨 💋
🏂 SmartOffice	🛛 📢 4:20 🛛 🐽		
Investment Totals Jos	eph Ackerman		
Cost:	\$674,973		
Tax:	\$447,378		
Value:	\$692,413		
Tools  🧝 🔯 👫	🖻 🖓 🚮 🖉		