

CONTACT Sage Pro PocketPC PDA Sync Manual version 2.3

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Introduction:

The Contact Sage Pro PocketPC PDA sync module gives you unprecedented access to your data as well as control over the synchronization process. Our philosophy toward a PDA is that it must provide all relevant data about your contacts, including address book information, appointments, notes, remarks, links, policies, and investments. This ensures that you will always have all of a contact's information at hand. Additionally, it doesn't make sense to transfer all of your contacts to a PDA if your database includes leads and prospects. These extraneous entries will only eat up memory and slow down your PDA. Because of this philosophy, we give you the ability to select which contacts are synchronized with the PDA, whether policies and investments are synchronized, and we also let you choose time frames for notes and appointments that are synchronized.

Beyond letting you select which data is synchronized, there are also functions to protect your main system data. All changes made on your PDA are first validated for correctness. You then approve all changes made on the PDA before those changes are applied to your main system. (All new records added on your PDA are all validated and added to your main system automatically.) **Whole record deletes made on the PDA will not be made to the Main System.** This is done to prevent accidental data loss. You can only delete entire records on the main system.

Hardware requirements:

The Contact Sage Pro PDA Module for Pocket PC works through and requires the Contact Sage Pro. The system itself is distributed online or with the Contact Sage Pro, and includes PDA application, Instruction Manual, Main System sync database, and the PDA Conduit. The module has been tested and approved for PocketPC 2002 and 2003.

The recommended system requirements for the Contact Sage Pro PocketPC PDA Program are:

- a) 133 MHz or higher processor
- b) 8 MB of RAM or higher
- c) PocketPC 2002 or newer

The recommended system requirements for the Contact Sage Pro are:

- a) 233 MHz Pentium class machine or higher
- b) 64 MB of RAM or higher
- c) Windows 95 or newer

Our systems interface with programs from Microsoft Office, Microsoft Outlook, Email Programs, Group Mail Programs, Image Viewer Programs, and PDA sync programs and applications. Many of our users also set up our systems on networks so that multiple users can use the same system at the same time. We **cannot provide support** for **software** that we did not create, even if our systems can interface and use that software. Further, we **cannot provide support** for setting up **network systems**. Our systems are designed to only pass data to outside programs. Please **direct all support questions** about **outside programs** to the developers of those programs.

We reserve the right to change the cost of the Contact Sage Pro, all modules, and the Annual Support without prior notice. However, the Annual Support price will [always remain](#) at the level that it was at when the software was purchased.

Installation

To install the PocketPC PDA Program:

- 1) install the latest version of ActiveSync from Microsoft.com (should be 3.5 or newer)
- 2) plug the sync cable into your PocketPC PDA, or place the PDA into the sync cradle
- 3) if Activesync doesn't start automatically, run Activesync
- 4) run the cisageppc.exe application in c:\cisagemailmerge\cisageppc.exe by going to My Computer, then Disk C: then the c:\cisagemailmerge\ folder
- 5) click Next until you reach the License screen
- 6) accept the agreement by clicking "I Agree" then Next (Figure 1)
- 7) install to the Default directory and click Yes to create the directory (Figure 2)
- 8) keep clicking Next until the installation finishes

Figure 1:

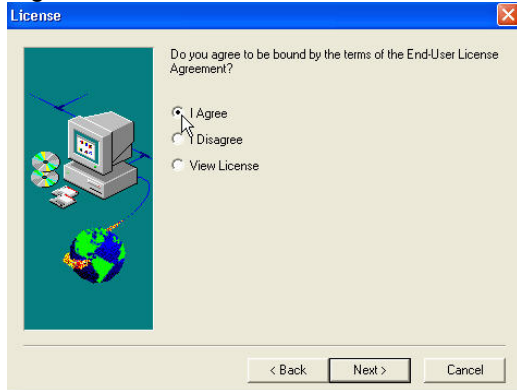
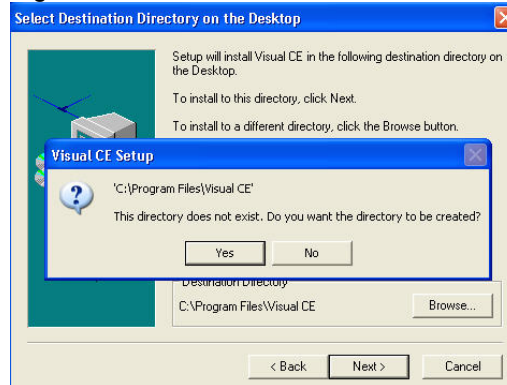


Figure 2:



If you will be synchronizing changes made on the Pocket PC back to the desktop system, you must also install a Microsoft Access ODBC Driver fix. The fix replaces a driver file on your computer that the synchronization process uses. You only need to install this fix if you will be synchronizing changes made on the Pocket PC with the desktop. If you will only be outputting contact data to the Pocket PC, you do not need to install this fix. To install the fix, do the following:

- 1) restart Microsoft Windows in Safe Mode (reboot your computer, then press the F8 key before you see the Windows splash screen)
- 2) run the cisageodbcupdate.exe file in the c:\cisagemailmerge\ directory. (go to My Computer, then click Local Disk C: or Hard Drive C:, then click on the cisagemailmerge folder)

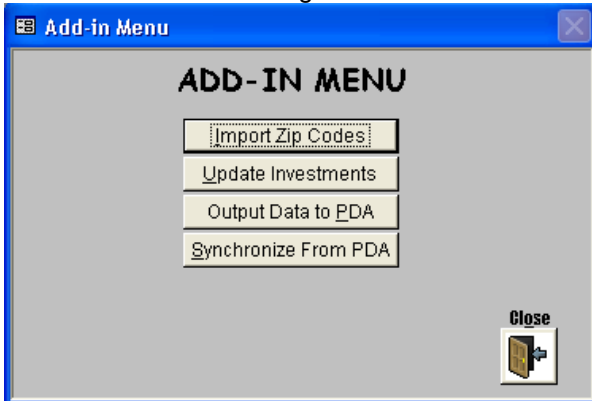
You must boot windows into Safe Mode to apply this fix, otherwise windows will automatically restore the old driver file.

Synchronizing with the PDA

All synchronization activities in the Contact Sage Pro are initiated from the Add-In Menu screen. **Before you can select the synchronization functions, please click on PocketPC in the Sync Setup choice in the Setup Screen.** (To open the Setup Screen in the Contact Sage Pro, click Utilities -> Setup.) You can open the Add-in Menu screen from the Utilities Screen in the Contact Sage Pro.



Addin Module Screen- Figure 3

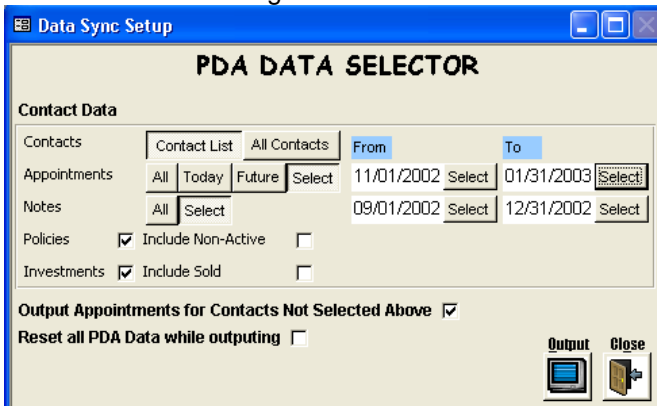


Output Data to PDA: opens the PDA Sync screen

Synchronize Data from PDA: compares the PDA data to the main system data and opens the PDA Synchronization Screen.

Before you start using the application, you must first select and send data to the PDA.

PDA Data Selector- Figure 4



Because of the limited memory and processor speed of most PDA's, large numbers of contacts, investments, policies, notes, and remarks can slow performance and require too much searching to find the right contact or data. You can select which contacts, notes, appointments, policies, and investments are synchronized with the PDA. This can be particularly useful if the Contact Sage Pro is used for leads and clients. You might prefer not to have all of the system leads on your PDA. In addition, the more data stored on the PDA, the slower synchronization will be.

Output options include:

Contacts: selects whether contacts selected in the list option or all contacts are output.

Appointments: selects which appointments are output, including a date range.

Notes: selects which notes are output, including a date range. (You might prefer not to include old notes on the PDA.)

Policies: selects whether policies are output and also if non-active policies are output.

Investments: selects whether investments are output and also if sold investments are output.

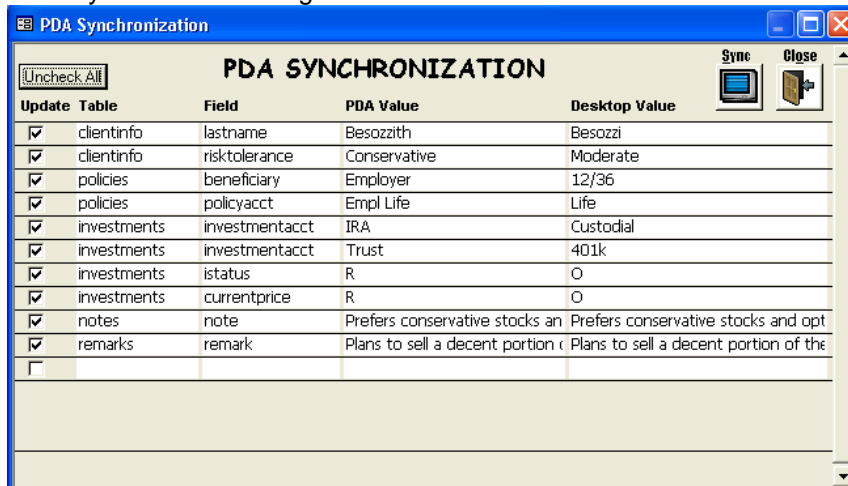
Output: outputs all of the data to the PDA.

Close: opens the addin menu.

The Contact Sage Pro creates an intermediate data bin to store all of the PDA data for synchronization. This is done to prevent data loss accidents when synchronizing, and to allow only selected data to be synchronized. Keep in mind that Contacts/Appointments/Remarks/Notes/Investments/Policies deleted on the PDA **will not be deleted** on the main system. **You will be asked to confirm all data changes made on the PDA.** New Contacts, Appointments, Remarks, Notes, Investments, and Policies **will automatically** be added to the main system.

If you change data on the PDA, you sync the changes with the main system by clicking Synchronize From PDA.

PDA Synchronization- Figure 5



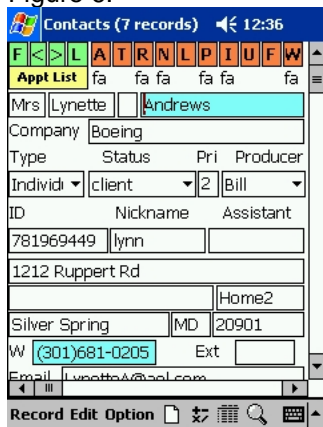
You will be asked to confirm all changes to main system data made on the PDA before the changes are made to the main system. To confirm a change, simply check update on this screen. Once you are finished, click Sync.

Sync: makes all checked PDA changes to the main system. **This cannot be undone.**

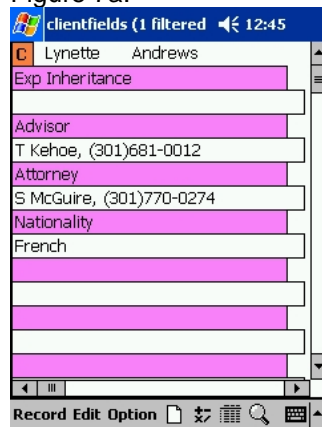
Using the PDA Application

To run the Contact Sage Pro on the PocketPC PDA, click the Windows icon on the PDA, then Programs, then ContactSagePro. To view an appointment list, click ContactSageProAppt.

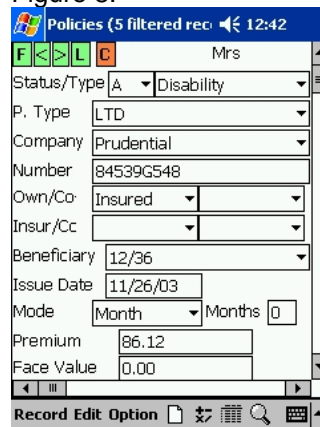
Contact Information
Figure 6:



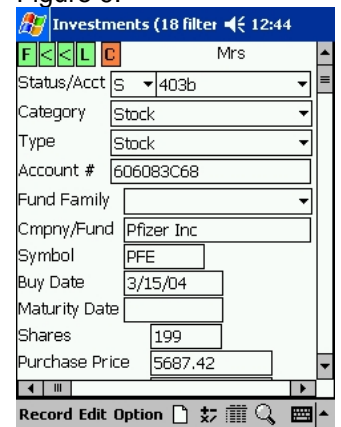
User Defined Fields
Figure 7a:



Policies
Figure 8:



Investments
Figure 9:



User Defined Fields
Figure 7b:

Wedding Date	
Review Date	9/14/04
Last Face-to-Face	9/14/03
Assets Elsewhere	95000
House Value	1941071
Home Equity	1746964

User Defined Fields
Figure 7c:

Outstanding Debt	105000
Credit Card Debt	3150
	0.000000
	0.000000
	0.000000
	0.000000
	0.000000
Has Will	<input checked="" type="checkbox"/>
Has Trust	<input type="checkbox"/>
Has POA	<input checked="" type="checkbox"/>
Send Holiday Card	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

Appointments
Figure 10:

Appts (1 filtered recor) 12:38
Lynette Andrews
Date: 9/10/05 Time: 10:30:00 AM Duration: 60
Type: Closing Mtg
Status: Scheduled
User: Bill
Description: close ira rollover

To Do List
Figure 11:

To Do List (1 filtered r) 12:41
Lynette Andrews
To Do Date: 9/2/04 Due Date: 9/5/04
Type: Check Value Status: 25% User: Bill
Description: check portfolio performance for q3 200

Remarks
Figure 12:

Remarks (5 filtered re) 12:41
Mrs
Remark: Height: 5'11" Weight: 187 lbs. Smoker: Quit- 07/1995

Notes

Figure 13:

Notes (2 filtered recor) 12:41
Mrs
Date: 9/26/04 Time: 11:42:00 AM
Category: General
Note: Prefers high risk stocks and mid risk mutual funds

URL Links

Figure 14:

urlinks (2 filtered recor) 12:44
Lynette Andrews
Name: Personal Homepage Path: #http:\\www.LAndrews.com#

You can view a list of the records for each screen by tapping the table icon at the bottom of each screen. To select a specific record to view, double tap it.

Figure 15:

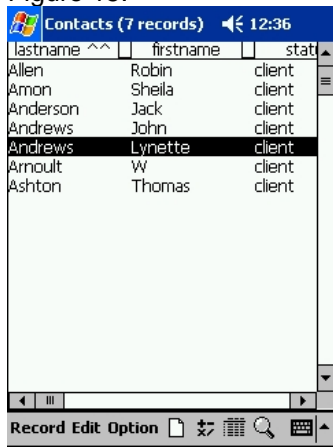


Figure 16:

