



Client Data System[®]
E-Z Mobile for Palm
User Guide



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Introduction

E-Z Mobile for Palm OS® is a robust custom application that E-Z Data developed for Palm OS® devices. Using iAnywhere Solutions' Ultralite database and MobiLink Server, E-Z Mobile for Palm is used to synchronize Client Data System (CDS) with the Palm device without interfering with existing information.

The following records can be synchronized:

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

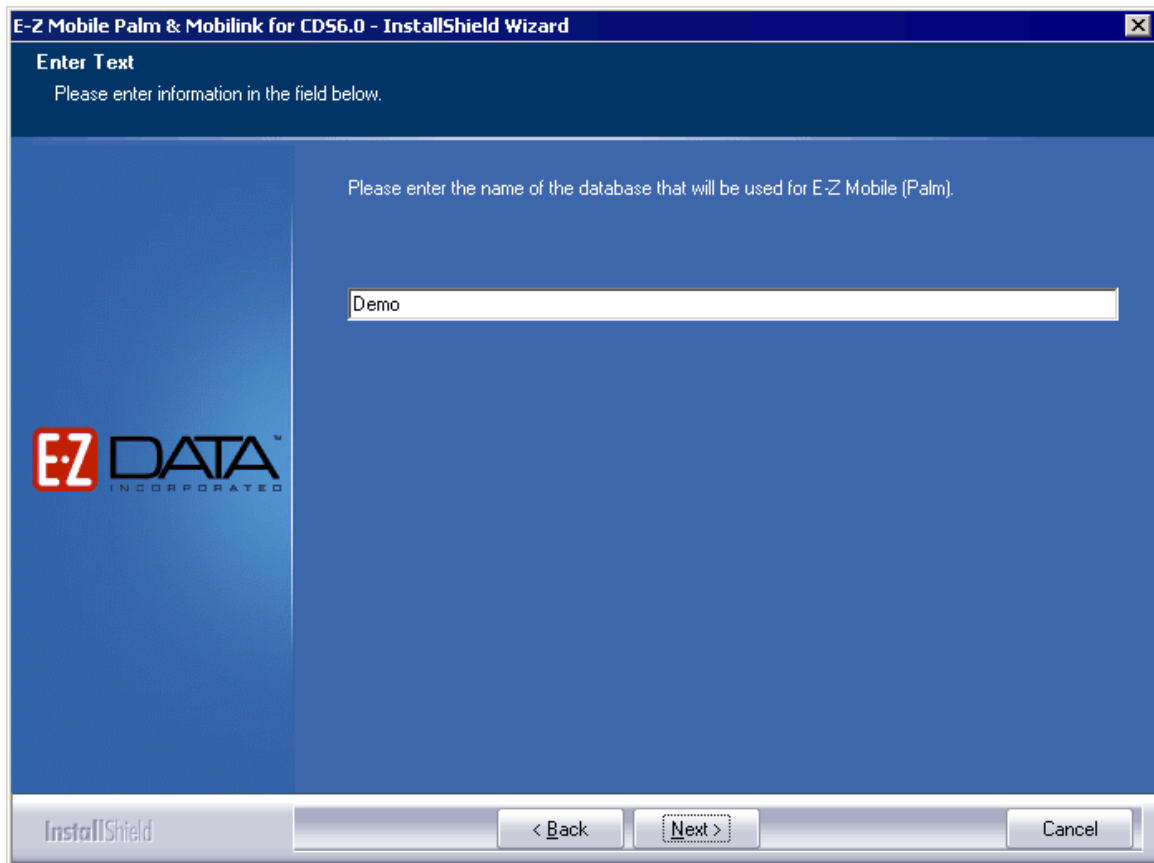
Pre-Installation Checklist

Prior to installation, please make certain that all of the following requirements are met:

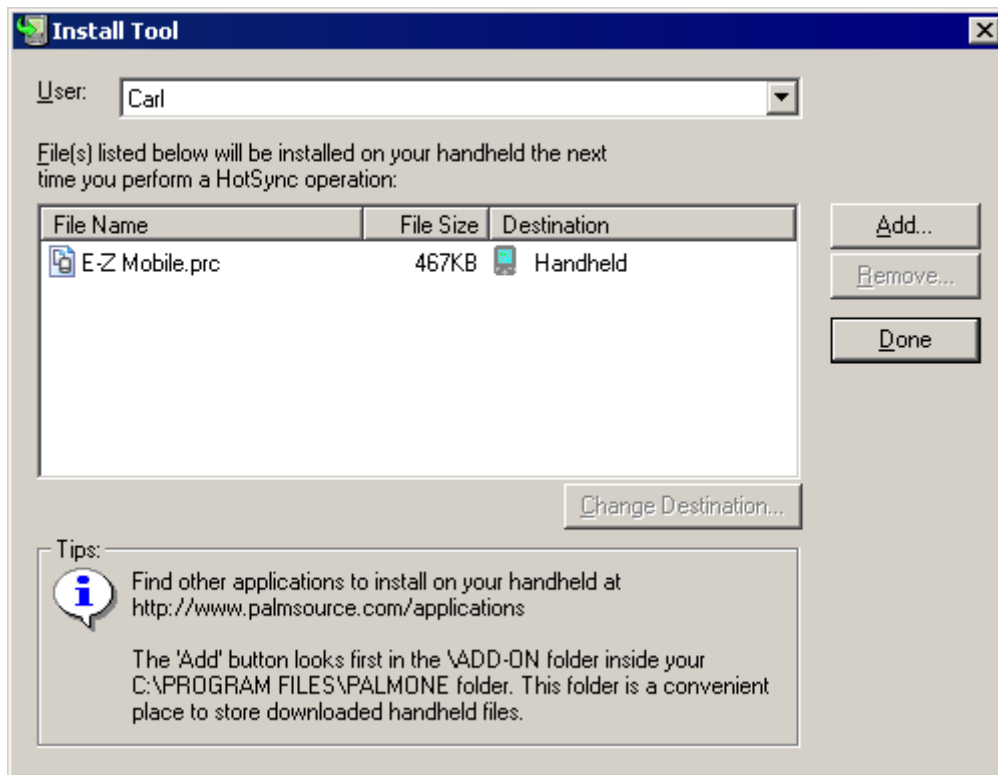
- CDS version 6.0 or later must be installed on the system (stand-alone or workstation).
- Verify that the Palm OS®-compatible device is running Palm OS® version 3.5.3 or higher and has 4MB of RAM available. For optimum performance, a processor of 33 MHz or higher is also recommended.
- Synchronization in a network environment is only supported through the use of the TCP/IP protocol. If TCP/IP is not used as the communication protocol between the workstation and server, synchronization between CDS and E-Z Mobile will not occur. (Contact your network administrator or consultant for assistance with protocol changes or additions.)
- Install Palm™ Desktop software for the Palm OS®-compatible device that will be used with the E-Z Mobile program.
- Perform a HotSync® operation to verify connectivity and backup data on the handheld device.
- Use the **Add/Remove Programs** utility in the Windows Control Panel to uninstall **E-Z Conduit**, **E-Z Sync**, or earlier versions of **E-Z Mobile**.
- From the **User Profile** of the user who will synchronize data, on the **Security Information** tab, select **E-Z Mobile - Palm** from the PDA Options drop-down list. Access rights to the system level of CDS to change User Profile security options are required for this process. Refer to the *Users and User Profiles* topic in CDS WebHelp for setup procedures.
- Ensure that the CDS **E-Z Mobile - Palm** option in **Module Preferences** is selected for the user who will synchronize data between CDS and E-Z Mobile for Palm. Refer to the subtopics of *Getting Started in CDS* for help with setting up Module Preferences.
- Validate the Policy and Investment information in the database that will be used with the E-Z Mobile program.

Installing Mobilink Server & E-Z Mobile for Palm®

1. Insert the CDS 6.0 CD into the computer's CD-ROM drive.
2. Cancel the Installation Wizard if it opens automatically and then open **My Computer**.
3. Right-click on the CD drive and then select **Explore**.
4. Double-click the **CDS** folder.
5. From the CDS folder, double-click the **E-Z Mobile Palm for CDS 6.0** folder to display its contents.
6. From the Welcome dialog box, click the **Next** button to begin installation of E-Z Mobile Palm & MobiLink for CDS 6.0.
7. From the Choose Destination Location dialog box, click the **Next** button to accept the default Destination Folder for installation.
8. From the Enter Text dialog box, type in the name of the database that will be used for E-Z Mobile and then click the **Next** button to begin installation.



- From the Install Tool dialog box, select the User name from the drop-down list and then click the **Done** button.



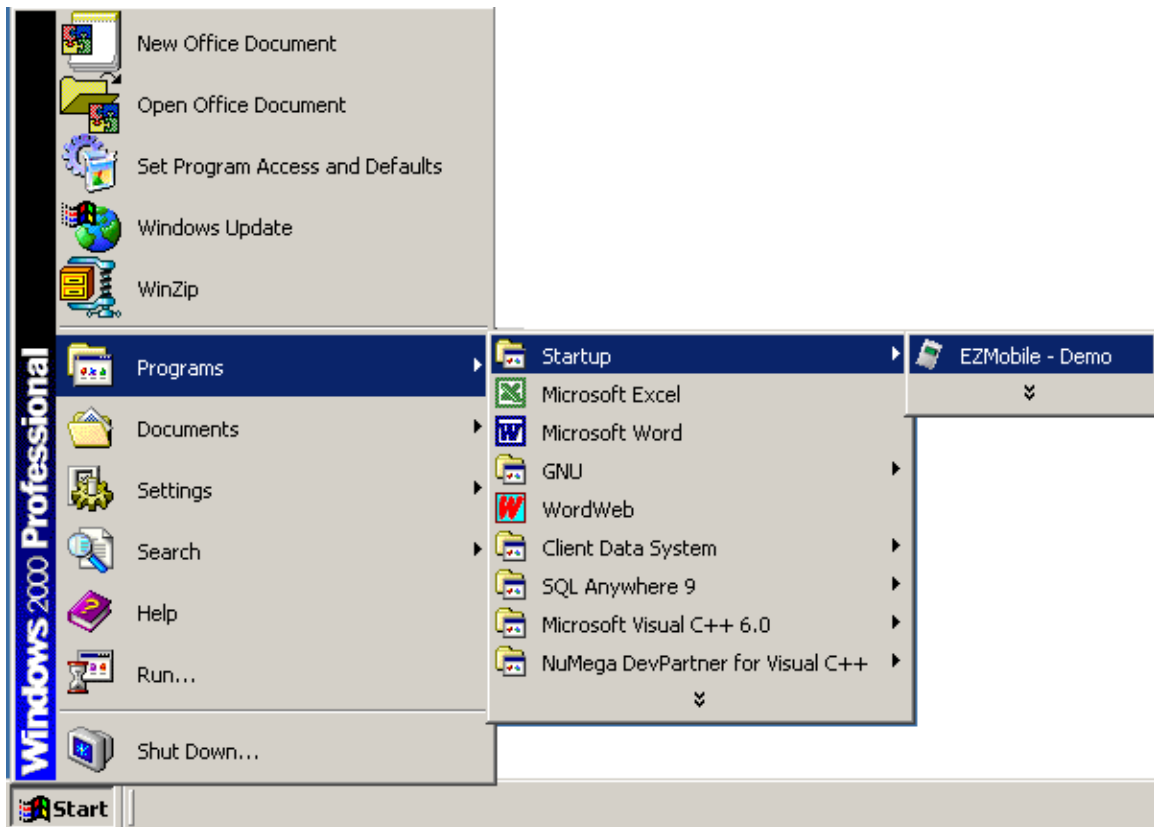
- Click the **OK** button to confirm that the file will be installed during the next HotSync.
- When prompted, perform a HotSync operation to install the E-Z Mobile program on the handheld device. The E-Z Mobile installation program will remain open during the HotSync operation.
- Click the **Yes** button when prompted to close the HotSync Manager and then click the **Yes** button again to confirm the choice.
- If applicable, the Database Upgrade Using SQL dialog box will display with all databases marked for upgrade listed. If this information is correct, click the **OK** button to continue.

Note: CDS users may use the E-Z Mobile program to synchronize with only one database per license; however, the upgrade program only needs to run once for each database. If each CDS user will be synchronizing with a different database, then all databases can be processed at the same time. Click the **DeSelect All** button if there is more than one database selected on the Databases list, and then select only the database that will be used with the E-Z Mobile program.

- The database upgrade begins and when it is complete, click the **OK** button to continue.
- The E-Z Mobile installation is now complete. Click the **Finish** button to close the InstallShield wizard.

Starting the Mobilink Server

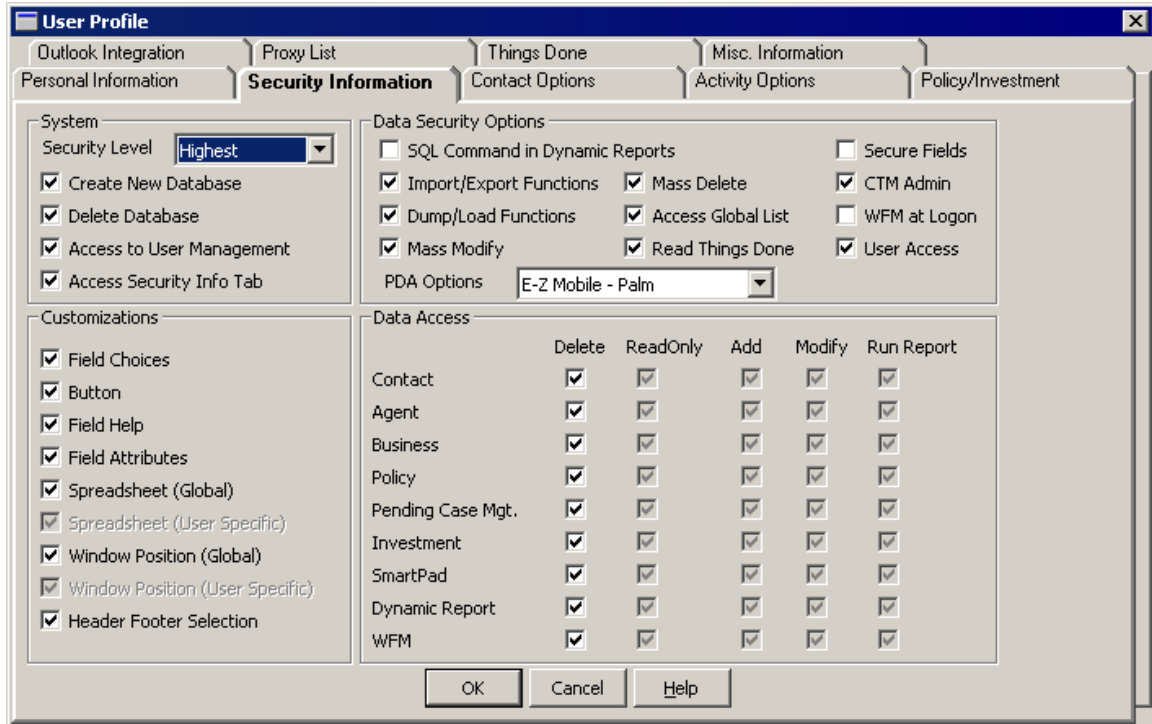
1. Click **Start, Programs, Startup**, and then select **EZMobile - Demo** to start the MobiLink server.



2. The Mobilink server starts and is now ready to synchronize the data between CDS and E-Z Mobile for Palm.

Enabling E-Z Mobile for Palm

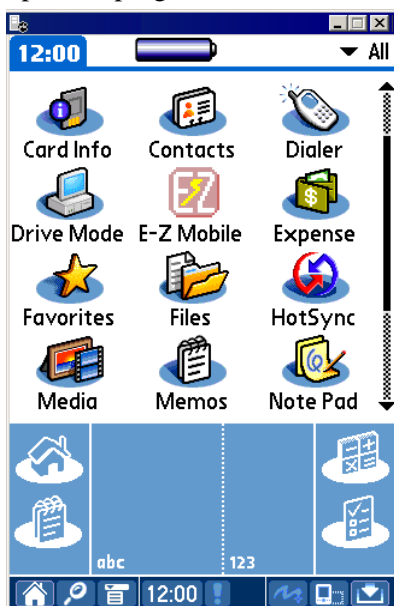
1. In CDS, select **Modify Current User's Profile** from the expanded **Database** menu.
2. Click the **Security Information** tab.



3. In the Data Security Options section, select the **E-Z Mobile – Palm** option from the PDA Options drop-down list.

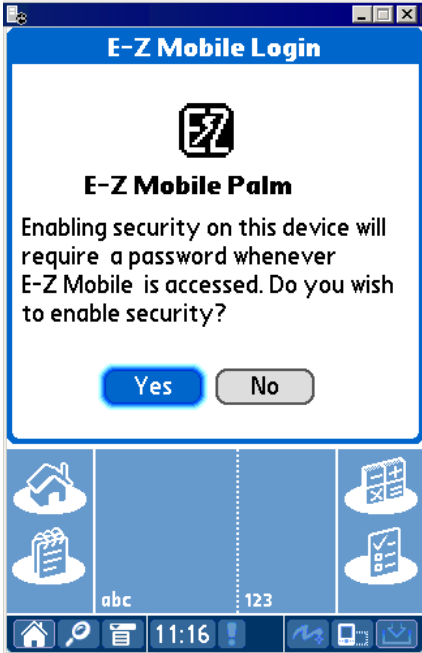
Accessing E-Z Mobile on the Palm OS® Device

Tap the **Applications** icon to display the applications list and then tap the **E-Z Mobile** icon to open the program.



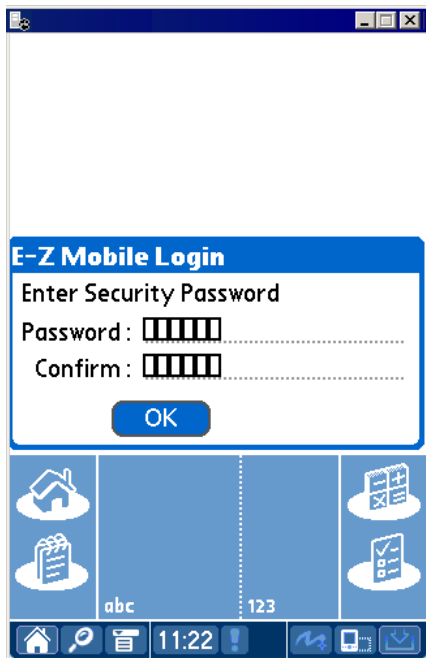
Running E-Z Mobile for the First Time

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

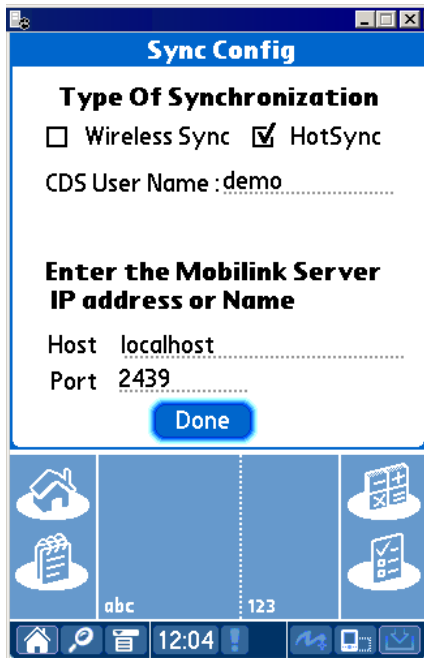


1. Click the **Yes** button to enable security and display the E-Z Mobile Login dialog box.

Note: The password is required each time E-Z Mobile is accessed. The password must be at least 6 characters with at least one alpha and one numeric character. The password can be changed at any time by accessing the **Security Password** option from the main E-Z Mobile menu.



2. Enter the password and then tap the **OK** button to display the Sync Config screen.

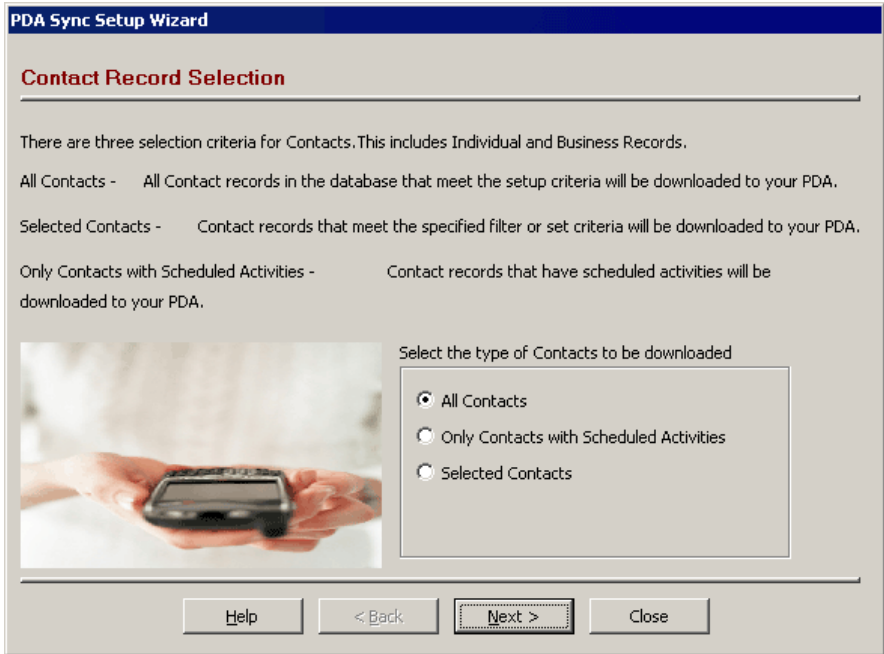


3. Enter the following information and then tap **Done**.
 - **Type of Synchronization:** Select the applicable Wireless Sync or HotSync option used to connect to the MobiLink server.
 - **CDS User Name:** User Name.
 - **Host:** Enter the IP address of the MobiLink server.
 - **Port:** Enter the Communication Port.

Setting Up E-Z Mobile Synchronization Criteria

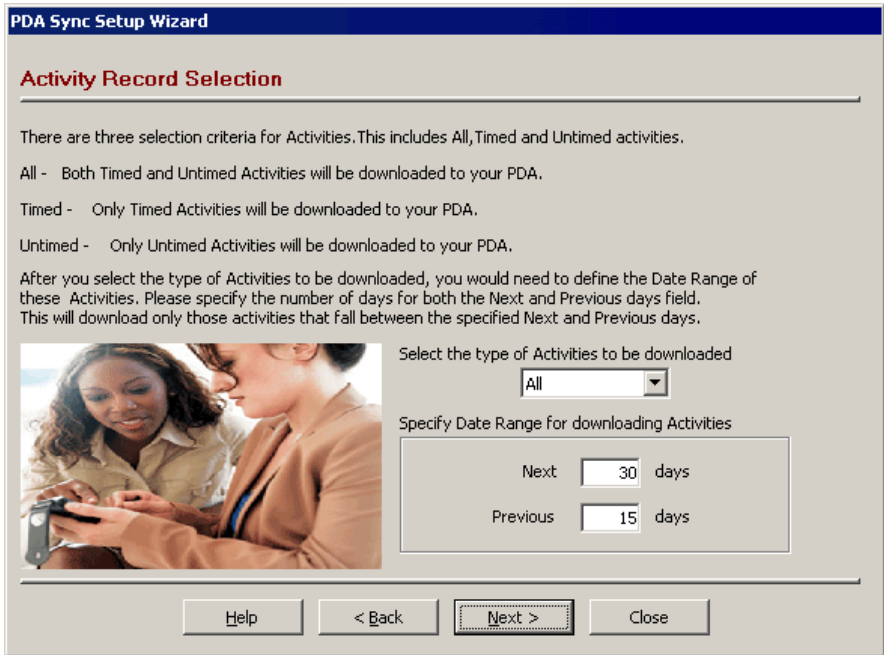
1. With the MobiLink server running, log in to CDS.
2. From the **Tools** menu, select the **PDA Interface Setup...** option to open the PDA Sync Setup Summary dialog box.

3. Delete any setup records that were used previously and then click the **Add Record** button to open the PDA Sync Setup Wizard.



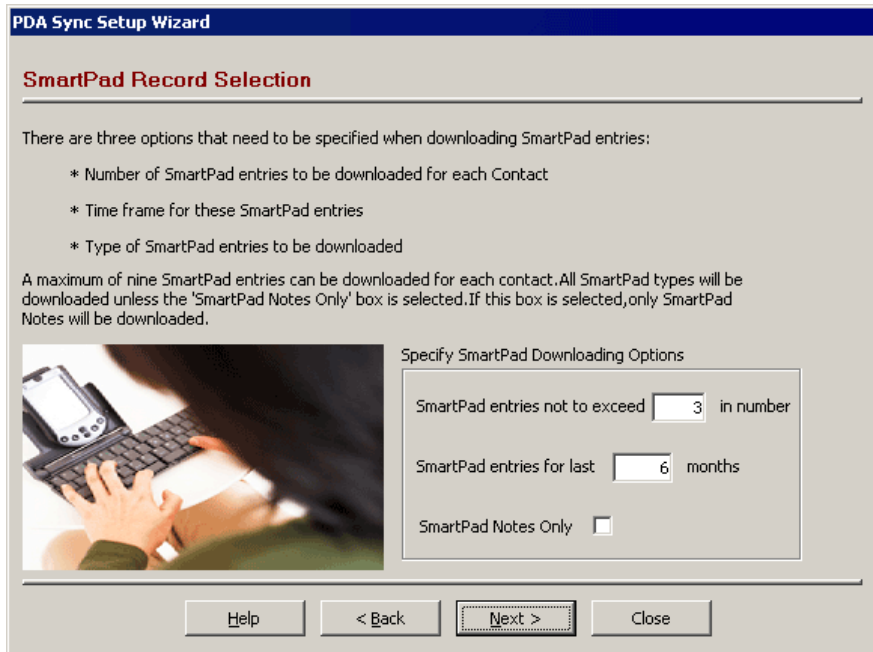
4. Choose the appropriate synchronization option and then click **Next** to open the Activity Record Selection dialog box.

Note: If the **Selected Contacts** option is selected, the Set Selection dialog box displays. Specify the appropriate contact Set for synchronization.

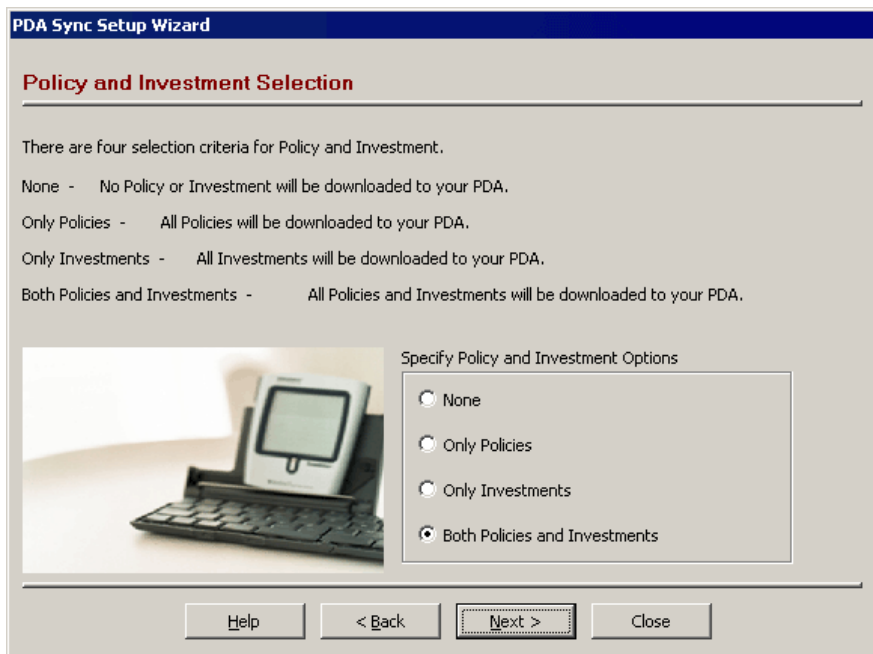


5. Select the Type of Activities to be downloaded from the corresponding drop-down list.

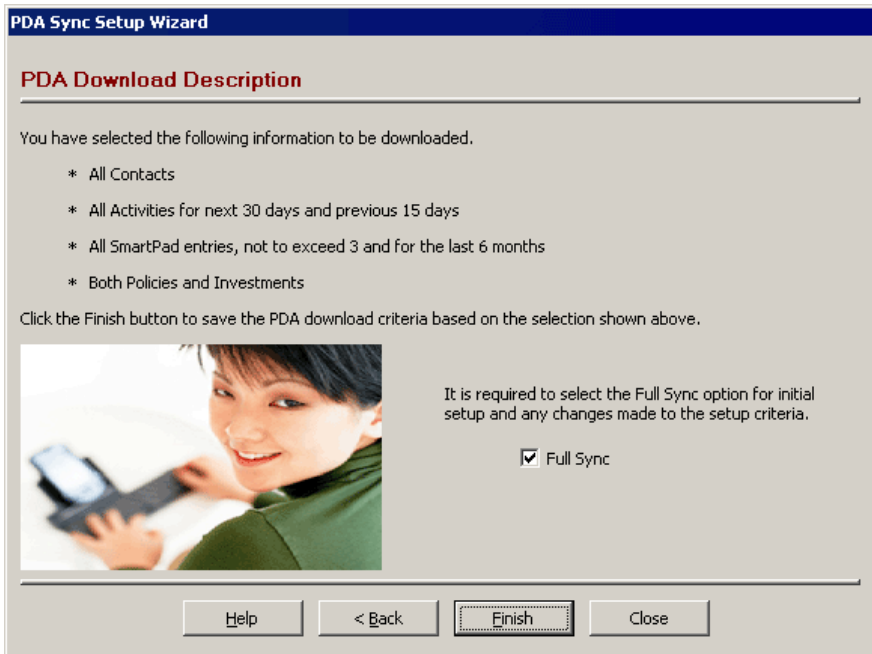
- Specify a date range of future and past activities for synchronization and then click **Next** to display the SmartPad Record Selection dialog box.



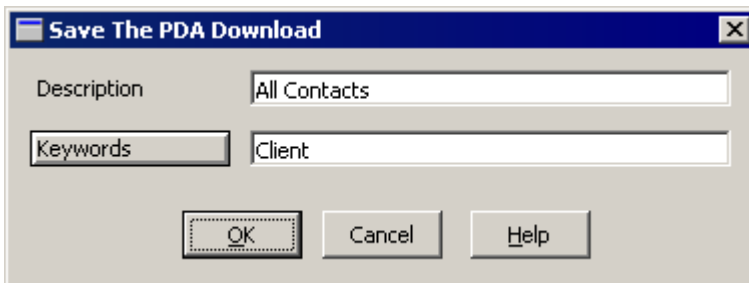
- Specify the SmartPad Downloading Options and then click **Next** to open the Policy and Investment Selection dialog box.



- Specify the Policy and Investment Options and then click **Next** to open the PDA Download Description dialog box.



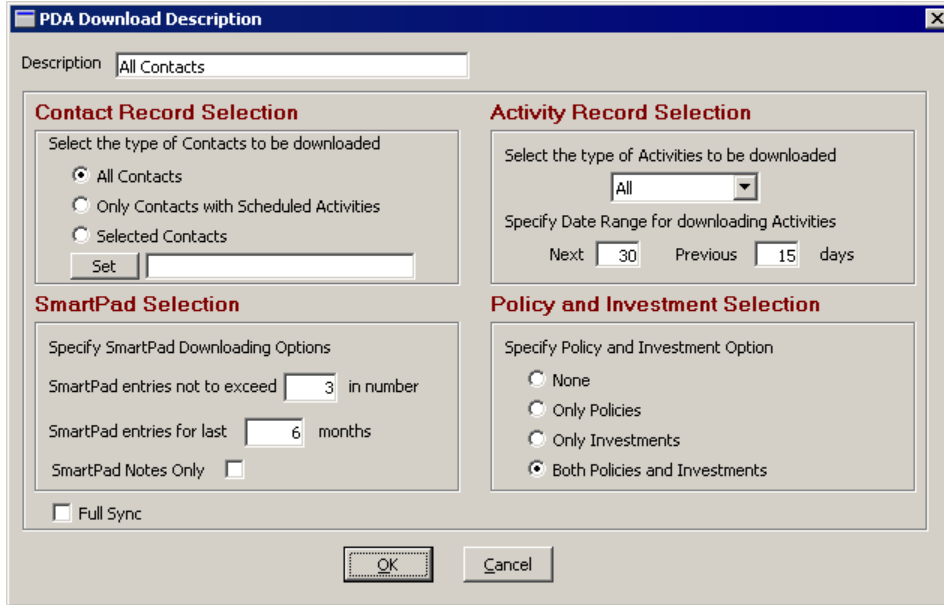
- The PDA Download Description is a review of the information selected for synchronization. For the initial synchronization, the **Full Sync** option should be enabled. If all of the information is correct, click the **Finish** button to open the Save the PDA Download dialog box.



- Enter a Description and any optional Keywords and then click **OK** to return to the PDA Sync Setup list.
- With the PDA Sync Setup record selected, click the **Run** button to process the records.
- After the records have been processed, perform a HotSync operation.
- When the HotSync operation is complete, start the E-Z Mobile program on the handheld device.

Preparing Data for Synchronization

1. From the PDA Sync Setup dialog box, tag the saved Sync record, click the **Run** button to populate the records from the database according to the specified criteria and then click **OK**.
2. After the initial setup is complete, perform a HotSync® operation to synchronize the data with the E-Z Mobile database on the Palm OS® device.
3. After the initial synchronization, double-click the saved sync criteria record to open the PDA Download Description dialog box.

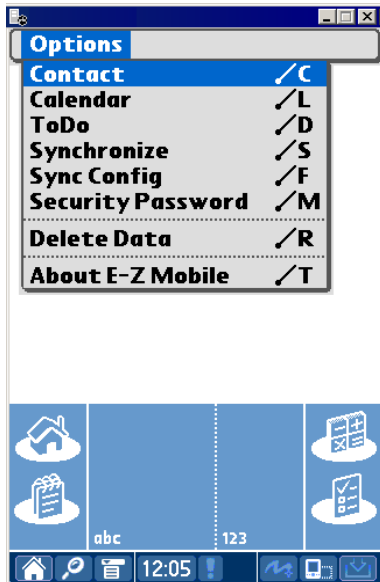


4. Modify the information as necessary and then click **OK**. Any data added or modified in E-Z Mobile on the PDA will automatically be added to CDS on the next synchronization.

Using E-Z Mobile

E-Z Mobile Tab

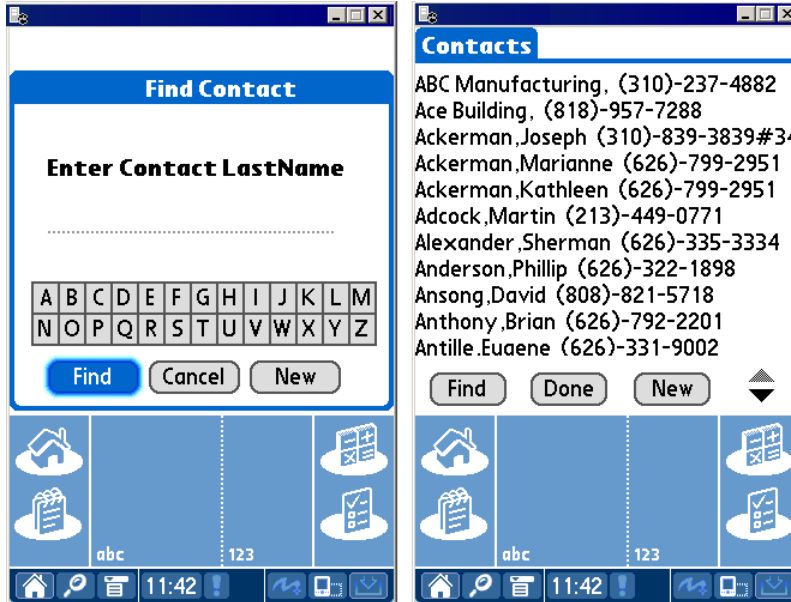
Navigation begins from the E-Z Mobile tab; tap the **E-Z Mobile** tab to display a list of options.



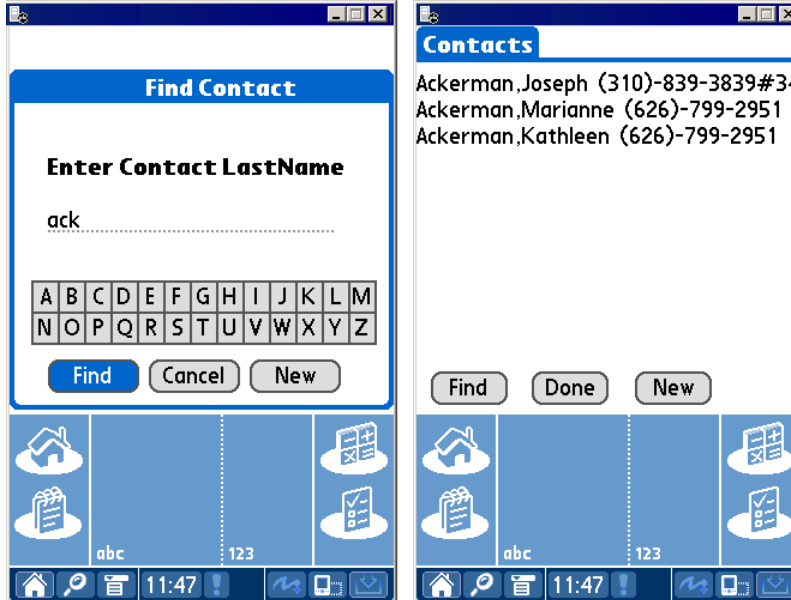
Contacts

Select **Contact** from the E-Z Mobile tab drop-down list to open the Find Contact dialog box. There are three ways to search for a Contact (Individual or Business) record:

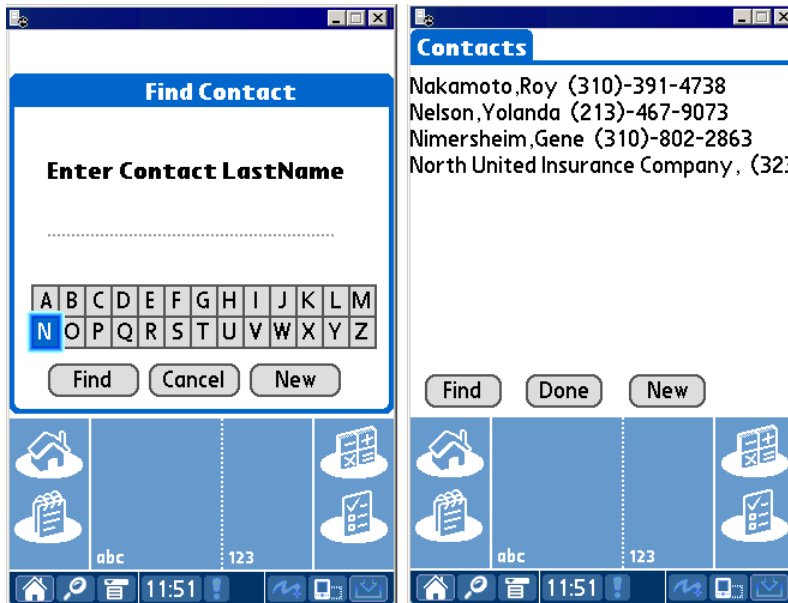
- Tap **Find** without entering any search criteria to display the global Contacts list.



- Enter a portion of the business name or individual contact's last name and then tap **Find** to display the Contacts tab matching the search criteria.

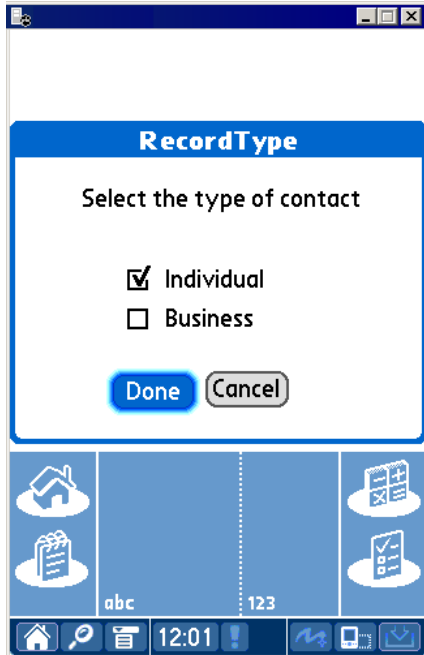


- Tap the first letter of the business name or individual contact's last name to display the Contacts tab matching the search criteria.

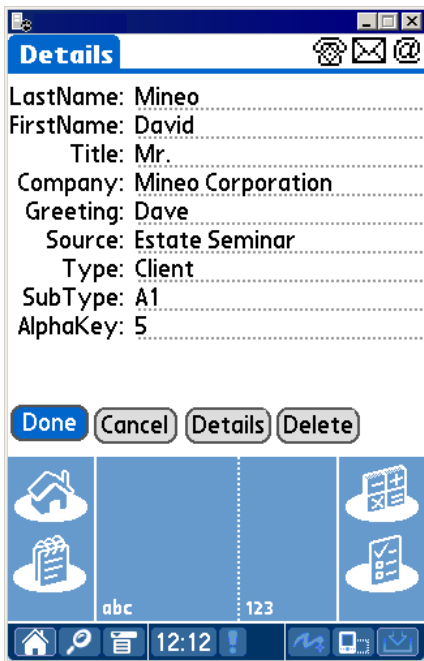


Creating a New Contact Record

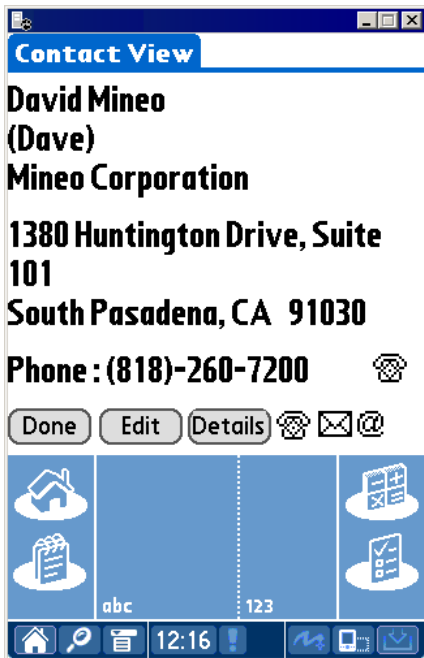
1. Select **Contact** from the **E-Z Mobile** tab drop-down list of options to open the Find Contact dialog box.
2. Tap **New** to open the Record Type dialog box.



3. Select the **Individual** option and then tap **Done** to display the Details tab.



4. Enter the contact information and then tap the **Details**, **Phone**, **Address** and **E-Mail** icons to enter the corresponding information.
5. Tap **Done** to save the information and display the Contact View tab.



3. Tap the **Phone Dial** icon to dial a number for this contact.

Contact Personal Dialog Box

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

Contact Personal

Category ▼ Client

Birth Date 11/28/1949 ▼ Age 55

Occupation Architect

Job Title Mr

Income 110000

HIPAA Clearance and Valid Thru 10/03/2007 ▼

Done Cancel

abc 123

12:19

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

Contact Phone List

1. From the Contact View tab, tap the **Phone** icon to display the Phone List tab.

Phone List

Business (818)-260-7200

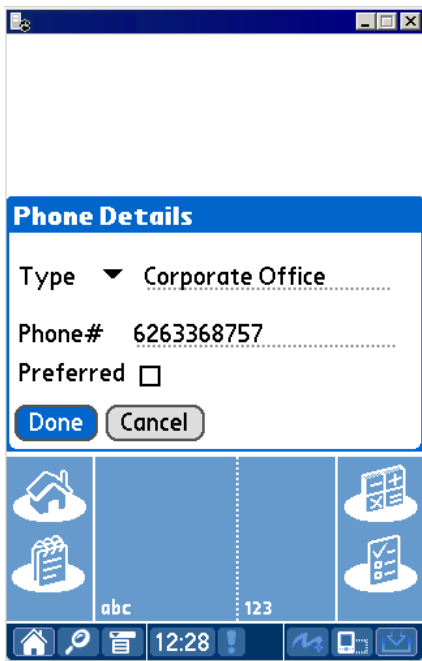
Residence (626)-337-4314

Done New

abc 123

12:25

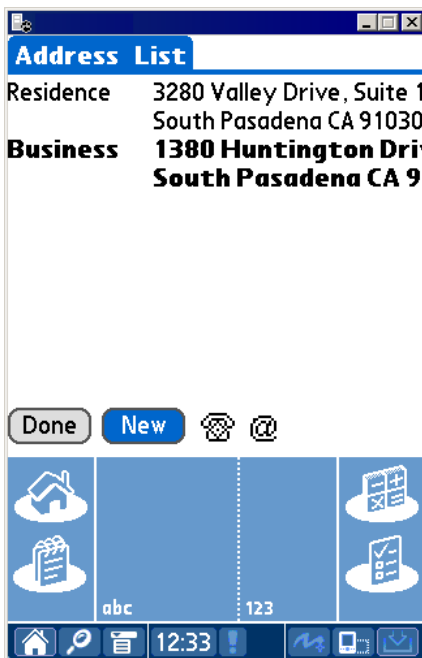
2. Tap **New** to open the Phone Details dialog box.



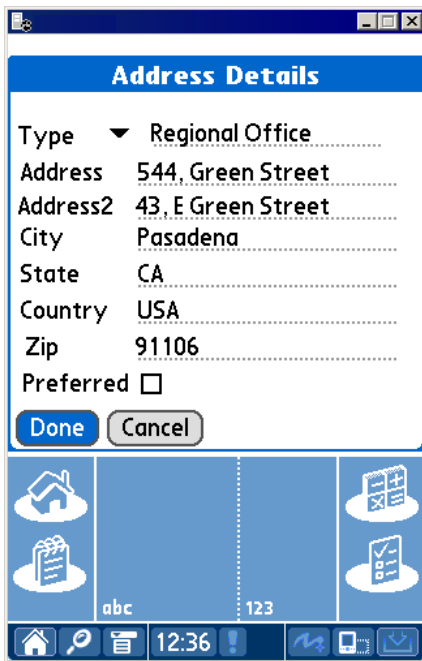
3. Tap the **Type** drop-down arrow to specify the phone type.
4. Enter the remaining phone information and then tap **Done** to save the additions.
5. Tap the **Phone Dial** icon to dial the number.

Contact Address List

1. From the Contact View tab, tap the **Address** icon to display the Address List tab.



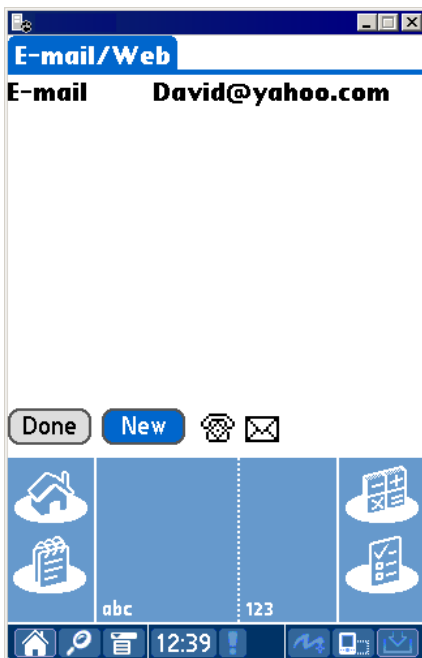
2. Tap **New** to open the Address Details dialog box.



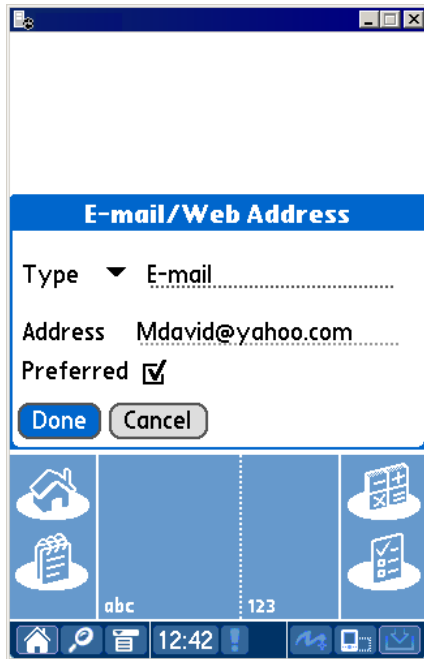
3. Tap the **Type** drop-down arrow to specify the address type.
4. Enter the remaining address information and then tap **Done** to save the additions.
Note: Both the Preferred Phone Number and Preferred Address are displayed on the Contact View tab of the Contact record.

Contact E-mail List

1. From the Contact View tab, tap the **E-mail** icon to display the E-mail/Web tab.



2. Tap **New** to open the E-mail/Web Address dialog box.



3. Tap the **Type** drop-down arrow to specify the address type.
4. Enter the remaining address information and then tap **Done** to save the additions.
Note: The Preferred E-mail address will be displayed on the Contact View tab of the Contact record.

Modifying a Contact Record

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

Modifying a Contact's Phone Number

1. From the Contact View tab, tap the **Phone** icon to display the Phone List tab.
2. Tap the number for modification to open the Phone Details dialog box.
3. Modify the information as necessary and then tap **Done** to save the changes.

Modifying a Contact's Address

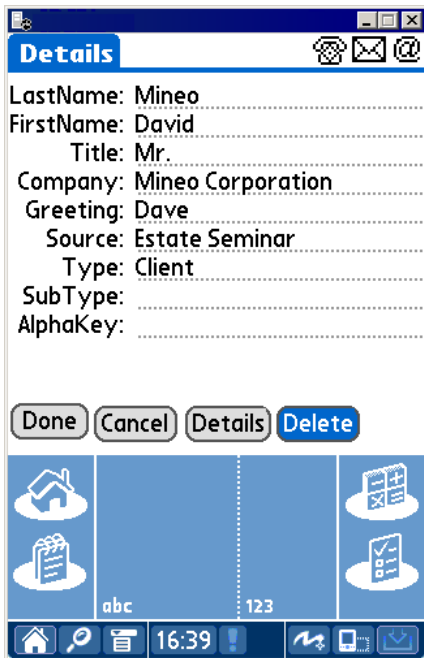
1. From the Contact View tab, tap the **Address** icon to display the Address List tab.
2. Tap the address for modification to open the Address Details dialog box.
3. Modify the information as necessary and then tap **Done** to save the changes.

Modifying a Contact's E-mail/Web Address

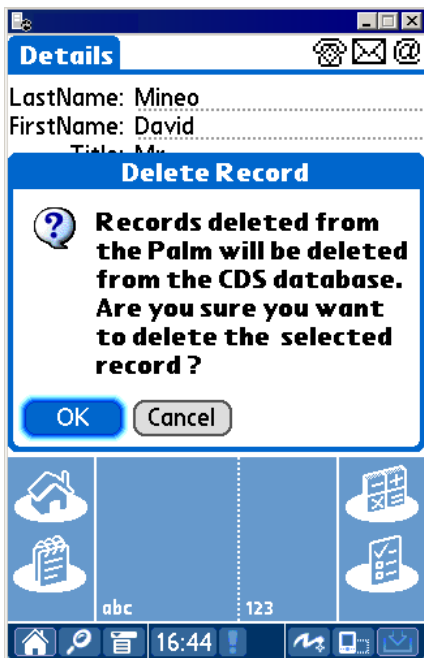
1. From the Contact View tab, tap the **E-mail** icon to display the E-mail/Web tab.
2. Tap the address for modification to open the E-mail/Web Address dialog box.
3. Modify the information as necessary and then tap **Done** to save the changes.

Deleting a Contact Record

1. From the Contact View tab, tap the **Edit** icon to display the Details tab.



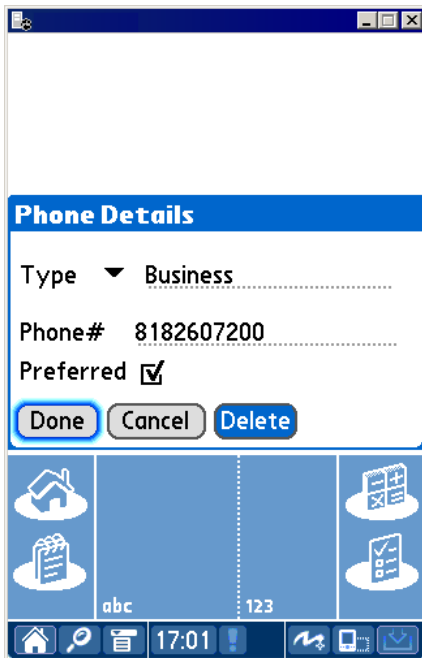
2. Tap **Delete** to open the Delete Record dialog box.



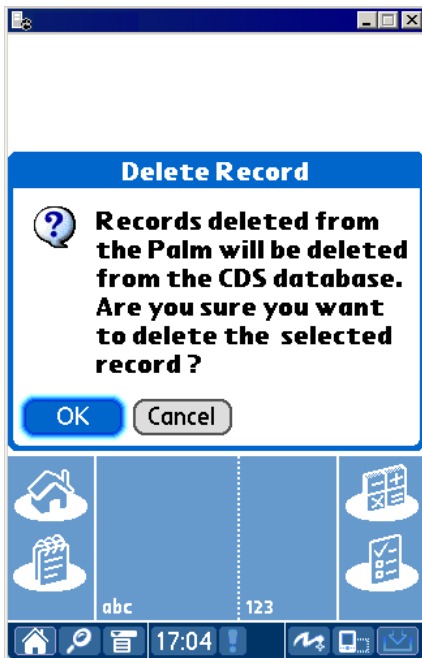
3. Tap **OK** to delete the selected record from the Palm device and the server.
Note: Perform a HotSync™ operation to synchronize the data.

Deleting a Phone Record

1. From the Contact View tab, tap the **Phone** icon to display the Phone List tab.
2. Tap an existing Phone record to display the Phone Details dialog box.



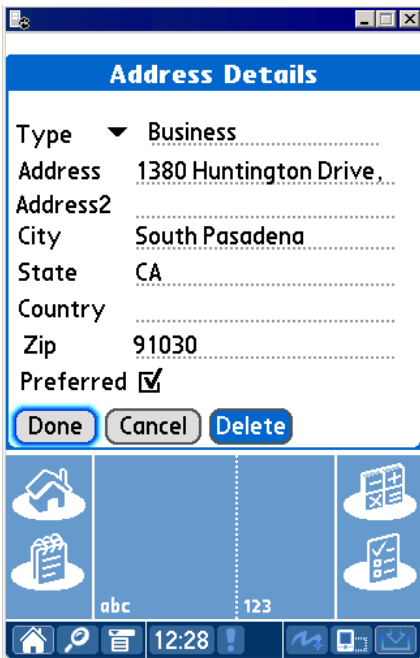
3. Tap **Delete** to open the Delete Record dialog box.



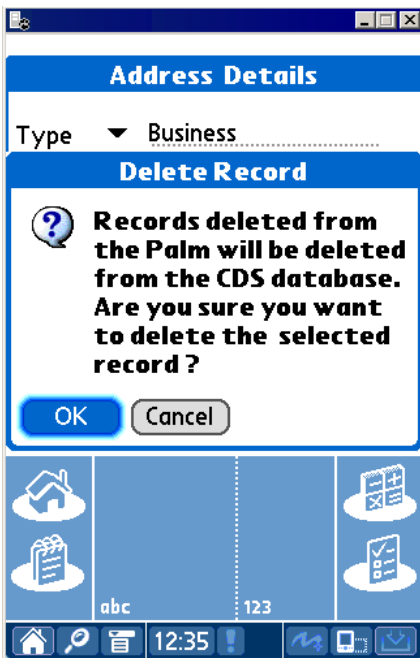
4. Tap **OK** to delete the selected record from the Palm device and the server.
5. Perform a HotSync™ operation to synchronize the data.

Deleting an Address Record

1. From the Contact View tab, tap the **Address** icon to display the Address List tab.
2. Tap an existing Address record to display the Address Details tab.



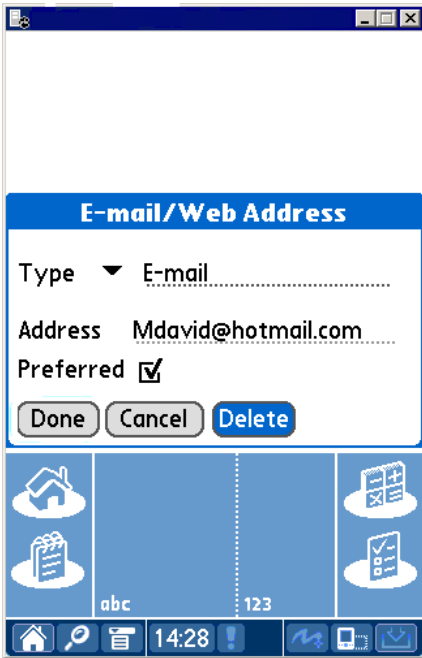
3. Tap **Delete** to open the Delete Record dialog box.



4. Tap **OK** to delete the selected record from the Palm device and the server.
5. Perform a HotSync™ operation to synchronize the data.

Deleting an E-mail Record

1. From the Contact View tab, tap the **E-mail** icon to display the E-mail/Web tab.
2. Tap an existing E-mail/Web record to display the E-mail/Web Address tab.



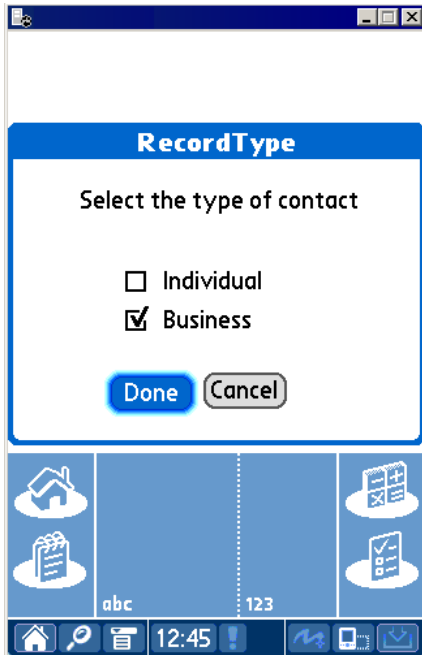
3. Tap **Delete** to open the Delete Record dialog box.



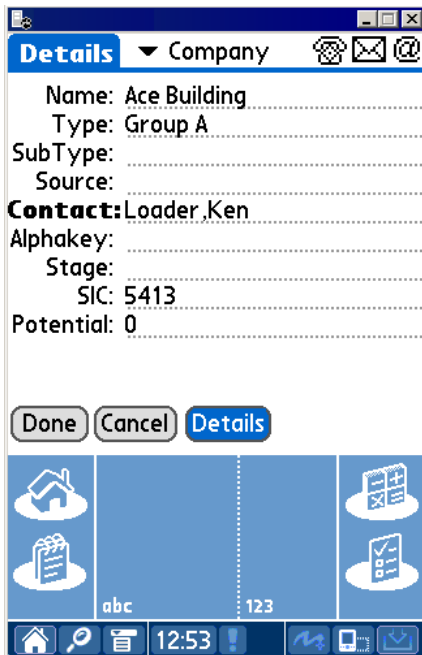
4. Tap **OK** to delete the selected record from the Palm device and the server.
5. Perform a HotSync™ operation to synchronize the data.

Creating a Business Contact Record

1. Select **Contact** from the **E-Z Mobile** tab drop-down list of options to open the Find Contact dialog box.
2. Tap **New** to open the Record Type dialog box.

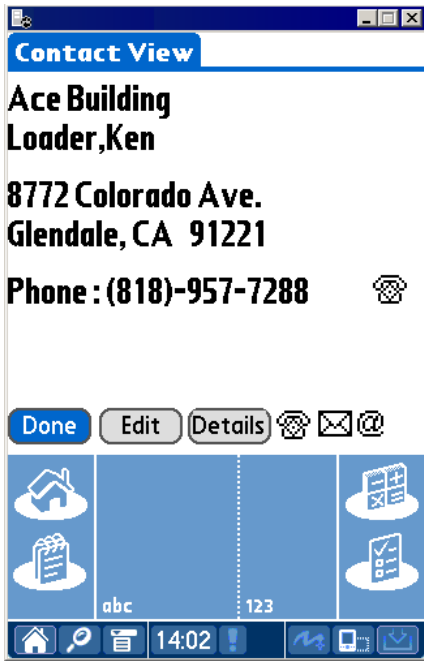


3. Select the **Business** option and then tap **Done** to display the Details tab.



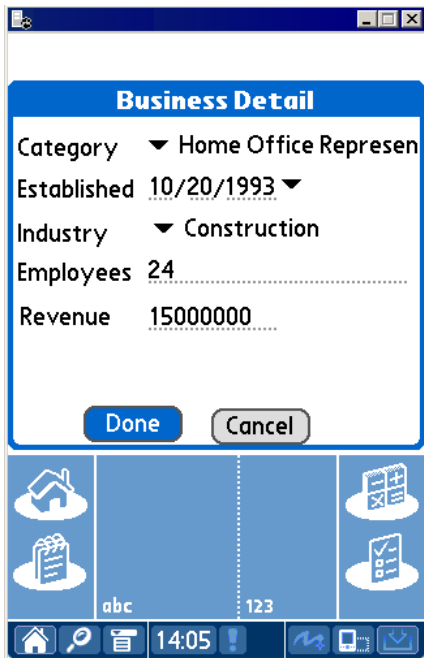
4. Enter the business information and then tap the **Details**, **Phone**, **Address** and **E-mail** icons to enter the corresponding information.

5. Tap **Done** to save the information and display the Contact View tab.



Business Detail Dialog Box

1. From the Contact View tab, tap the **Details** icon to open the Business Detail dialog box.



2. Enter the business information and then tap **Done** to save the additions.

Business Phone List

1. From the Contact View tab, tap the **Phone** icon to display the Phone List tab.
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 **Done** to save the additions.

Business Address List

1. From the Contact View tab, tap the **Address** icon to display the Address List tab.
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 **Done** to save the additions.

Business E-mail/Web List

1. From the Contact View tab, tap the **E-mail** icon to display the E-mail/Web List tab.
2. Tap **New** to open the E-mail/Web Address dialog box.
3. Tap the **Type** drop-down arrow to specify the type.
4. Enter the remaining address information and then tap **Done** to save the additions.
Note: The Preferred Phone Number, Preferred E-mail and Preferred Address are displayed on the Contact View tab of the Business Contact record.

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 a Contact phone number. Please refer to the *Modifying a Contact's Phone Number* section.

Modifying a Business Address

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

Modifying a Business E-mail/Web Address

1. From the Contact View tab, tap the **E-mail** icon to display the E-mail/Web tab.
2. Tap the address for modification to open the E-mail/Web Address dialog box.
3. Modify the information as necessary and then tap **Done** to save the changes.

Deleting a Business Record

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

Deleting a Business Phone Record

1. From the Contact View tab, tap the **Phone** icon to display the Phone Summary tab.
2. Tap an existing Phone record to display the Details tab.
3. Tap **Delete** to open the Delete Record dialog box.
4. Tap **OK** to delete the selected record from the Palm device and the server.

Deleting a Business Address

1. From the Contact View tab, tap the **Address** icon to display the Address List tab.
2. Tap an existing Address record to display the Address Details tab.
3. Tap **Delete** to open the Delete Record dialog box.
4. Tap **OK** to delete the selected record from the Palm device and the server.

Deleting a Business E-mail/Web Address

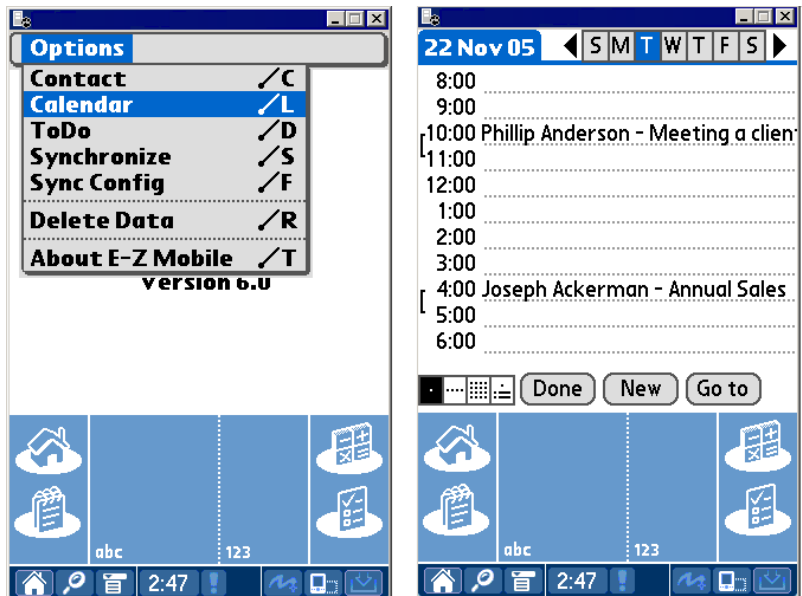
1. From the Contact View tab, tap the **E-mail** icon to display the E-mail/Web tab.
2. Tap an existing E-mail record to display the E-mail/Web Address tab.
3. Tap **Delete** to open the Delete Record dialog box.
4. Tap **OK** to delete the selected record from the Palm device and the server.

Calendar

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

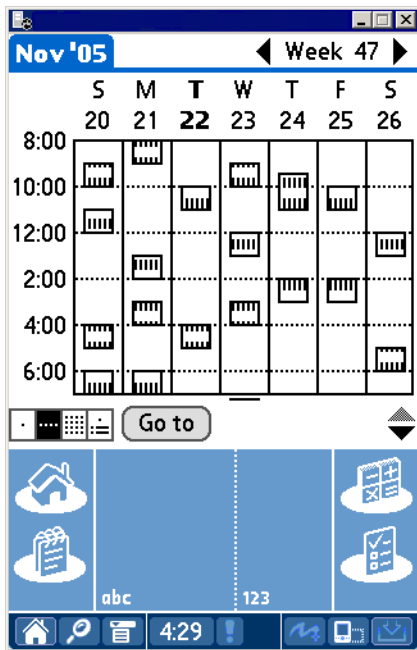
DayView

Select **Calendar** from the **E-Z Mobile** tab drop-down list to open the DayView calendar. The DayView is used to display the activities for a specific day. Previous or future day activities can be displayed by tapping the left or right arrows.



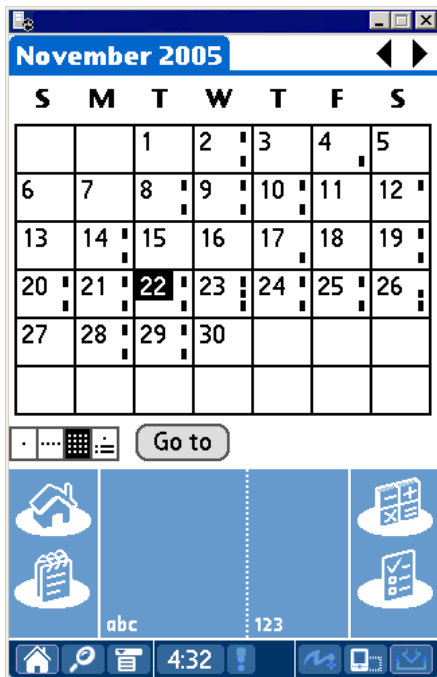
WeekView

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



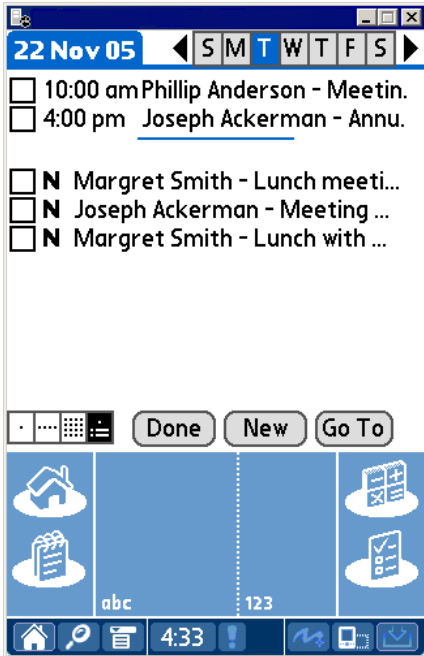
MonthView

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



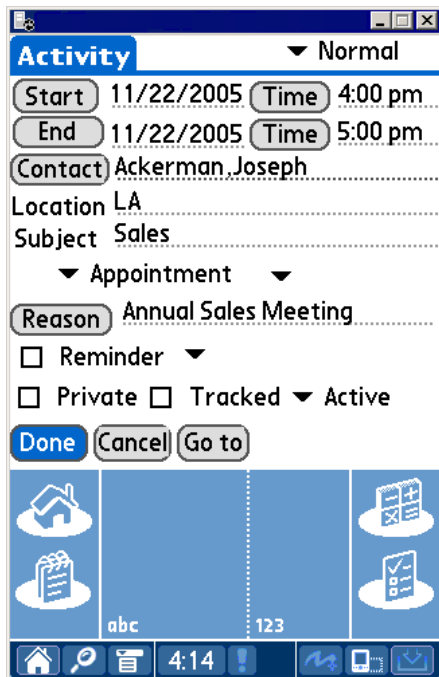
AgendaView

The AgendaView is used to display a combination of timed and untimed activities for a specific day. Previous or future day 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 **Done** to save the activity.



Activity Components

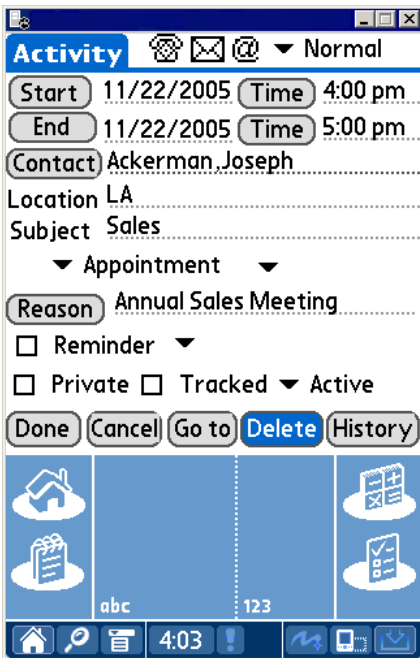
- **Phone:** The Phone icon will display after adding an activity for a particular contact. This icon will display on top of the screen. Tap the **Phone** icon to display the phone list for this contact. From the phone list, tap the **Phone Dial** icon to dial the number.
- **Address:** The Address icon will display after adding an activity for a particular contact. This icon will display on top of the screen (i.e., next to the Phone icon). Tap the **Address** icon to display the address list for this contact.
- **E-mail/Web:** The E-mail/Web icon will display after adding an activity for a particular contact. This icon will display on top of the screen (i.e., next to the Address icon). Tap the **E-mail** icon to display the E-mail/Web list for this contact.
- **Start/End:** Tap the **Start** and **End** icon to choose the date for an activity.
- **Time:** Tap the **Time** icon to specify the Start and End Time of an activity.
- **Contact:** Tap the **Contact** icon to link a contact to the activity.
- **Location:** Enter the Location for the activity.
- **Subject:** Enter the Subject for the activity.
- **Type:** Tap the **Type** drop-down arrow to display the activity type list.
- **Sub-Type:** Tap the **Sub-Type** drop-down arrow to display the activity Sub-Type list.
- **Reason:** Enter the Reason for the activity. If the reason takes up more than the space provided, tap the **Reason** icon to open the Details tab and display the complete entry.
- **Reminder:** Select the **Reminder** option and then specify the amount of time before the activity to be reminded.
- **Private:** Select this option to designate the activity as private.
- **Tracked:** Select the **Tracked** option to enter an Appointment into the Activity Tracking cycle.
- **Priority:** Tap the Priority Type drop-down arrow to specify the priority.
- **Status:** Tap the **Status** drop-down arrow to specify the status.
- **Done:** Tap **Done** to save the activity.
- **Cancel:** Tap **Cancel** to ignore the changes.
- **Go to:** Tap **Go to** to choose the date.
- **Delete:** Tap **Delete** to delete the activity.
- **History:** Tap **History** to view list of activity outcomes.

Modifying an Activity from the Calendar

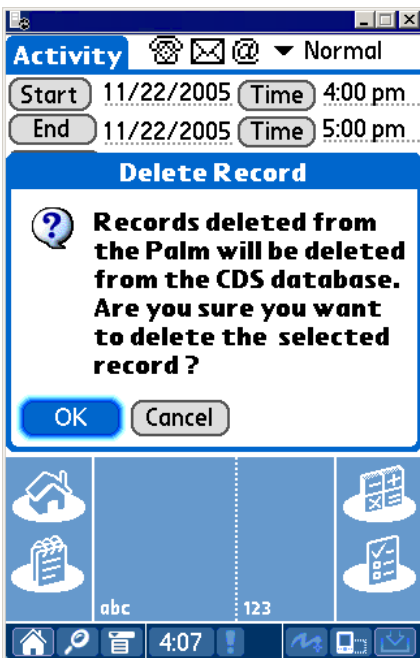
1. Select **Calendar** from the **E-Z Mobile** tab drop-down list of options to open the DayView calendar.
2. Tap the applicable activity to open the Activity Detail tab.
3. Modify the information as necessary and then tap **Done** to save the changes.

Deleting an Activity from the Calendar

1. Select **Calendar** from the **E-Z Mobile** tab drop-down list to open the DayView calendar.
2. Tap the applicable activity to open the Activity Detail tab.



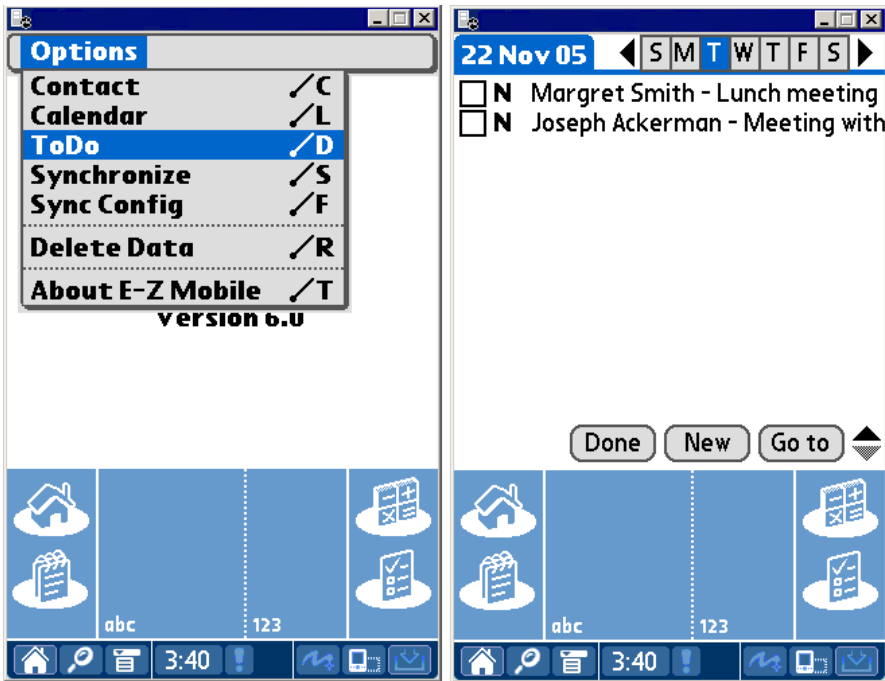
3. Tap **Delete** to display the confirmation dialog box.



4. Tap **OK** to delete the activity.

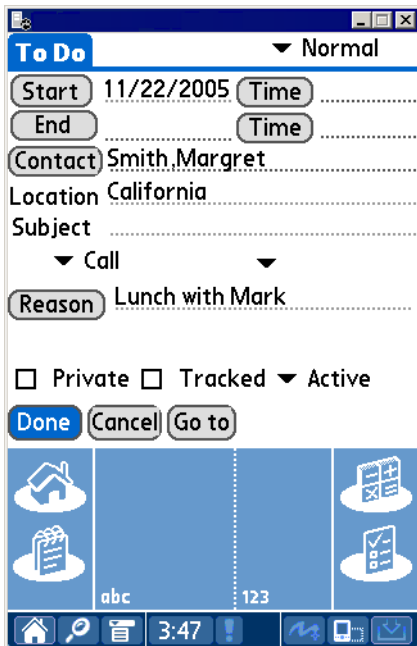
ToDo

Select **ToDo** from the **E-Z Mobile** tab drop-down list to open the untimed activities list.



Adding a ToDo

1. Select **ToDo** from the **E-Z Mobile** tab drop-down list to open the untimed activities list.
2. Tap **New** to open the To Do Detail tab.
3. Enter the untimed activity information and then tap **Done** to save the activity.

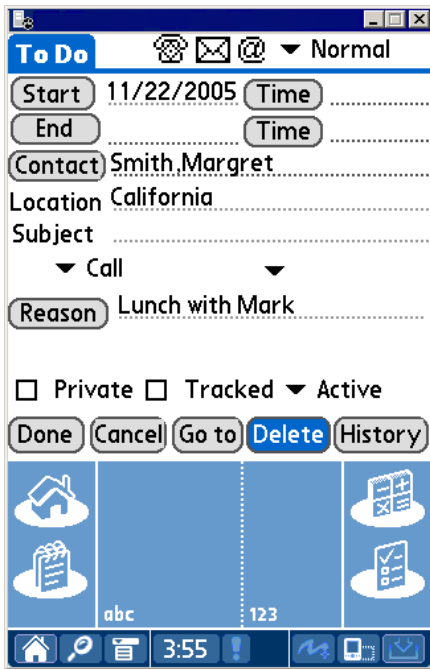


Modifying a ToDo

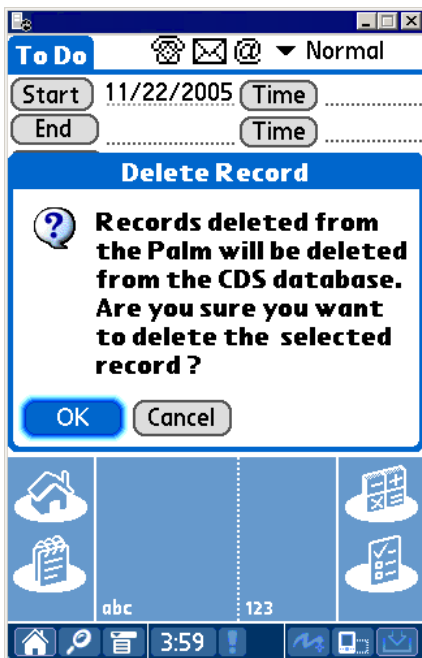
1. Select **ToDo** from the **E-Z Mobile** tab drop-down list to open the untimed activities list.
2. Tap the applicable **ToDo** item to open the To Do Detail tab.
3. Make the modifications as necessary and then tap **Done** to save the changes.

Deleting a ToDo

1. Select **ToDo** from the **E-Z Mobile** tab drop-down list to open the untimed activities list.
2. Tap the applicable **ToDo** item to open the To Do Detail tab.



3. Tap **Delete** to display the confirmation dialog box.



4. Tap **OK** to delete the ToDo item.

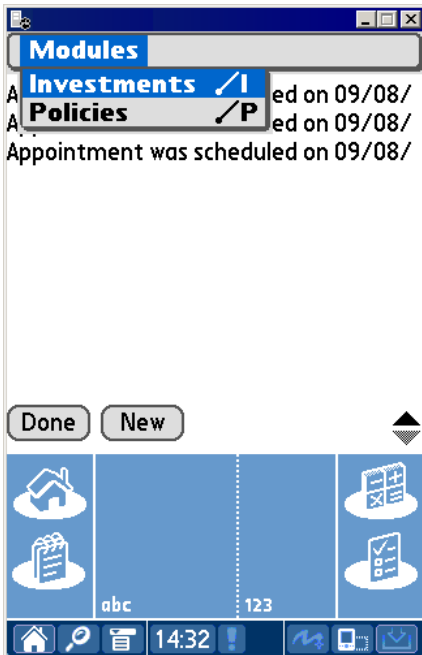
Contact Menu

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



SmartPad Menu

From the SmartPad list, tap the **SmartPad** tab to display the Modules drop-down list.



Policy Menu

From the Policy list, tap the **Policies** tab to display the Modules drop-down list.

| Modules | | |
|-----------------|---------|-----------|
| | Premium | Benefit |
| SmartPad | 5,000 | 695,700 |
| Assurable Life | 5,000 | 198,673 |
| Maximizer II | 1,450 | 400,000 |
| Preferred Plan | 455 | |
| Defender | 651 | 6,000 |
| LNL 10 Term | 1,450 | 1,000,000 |
| Overhead Expen | 4,127 | 4,000 |
| Universal Cover | 2,500 | 1,000,000 |
| Whole New Com | 4,000 | 100,000 |
| American Level | 1,800 | 500,000 |

Done Totals

abc 123

14:35

Investment Menu

From the Investment list, tap the **Investments** tab to display the Modules drop-down list.

| Modules | |
|----------------------|---------|
| | Value |
| SmartPad | 78,796 |
| American Pathwa | 24,864 |
| Household Furnishing | 80,000 |
| Boat Partnershi | 5,000 |
| 31 Oak Stree | 924,580 |
| Templeton World Fun | 30,204 |
| Fidelity Magella | 13,323 |
| APC Fixed Annuit | 25,240 |
| American Skandi | 34,187 |
| National Deposit | 66,029 |

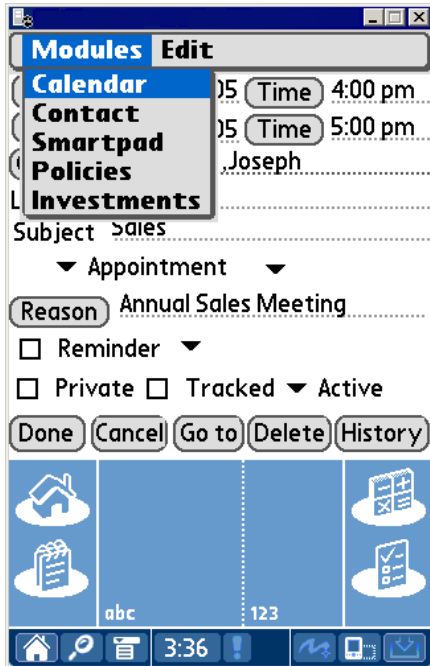
Done Totals

abc 123

14:38

Activity Menu

From the Activity Detail tab, tap the **Detail** tab to display the Modules drop-down list.

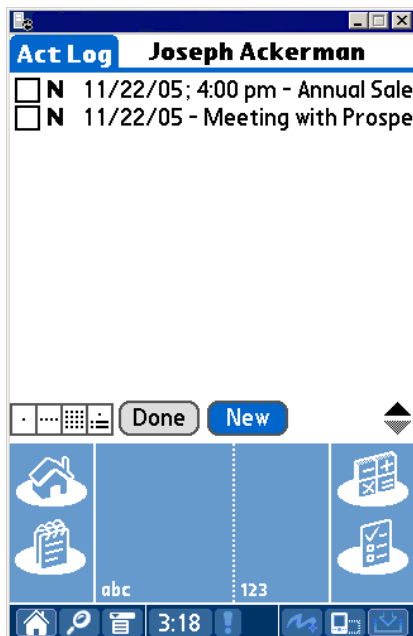


Activity Log

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

1. From the Contact View, tap the **Contact View** tab to display the Modules drop-down list.
2. Tap **Activity Log** to open the ActLog tab.



3. Tap **New** to open the Activity Detail tab.

4. Enter the activity information and then tap **Done** to save the activity.

Adding an Untimed Activity from the Activity Log

1. From the Contact View, tap the **Contact View** tab to display the Modules drop-down list.
2. Tap **Activity Log** to open the ActLog tab.
3. Tap **New** to open the To Do Detail tab.

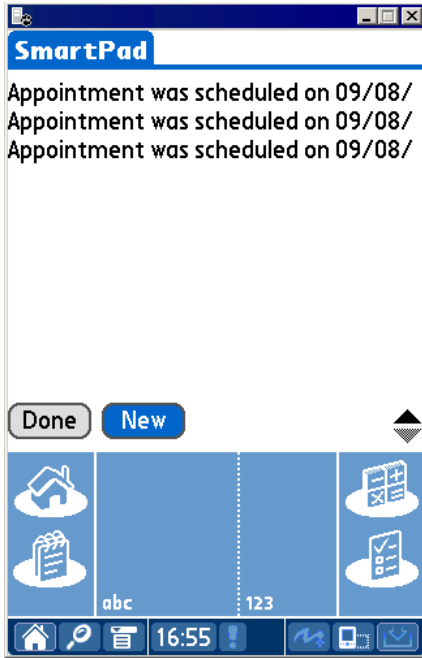
4. Enter the activity information without entering a time and then tap **Done** to save the activity.

SmartPad

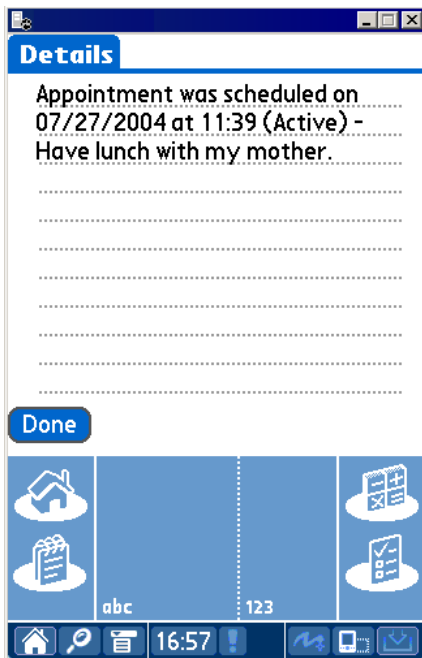
E-Z Mobile is used to view, add and delete SmartPad records that are synchronized with the CDS database. Note that only those SmartPad entries that are added with the E-Z Mobile for Palm OS® that are not synchronized with CDS can be modified.

Adding a SmartPad Note

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



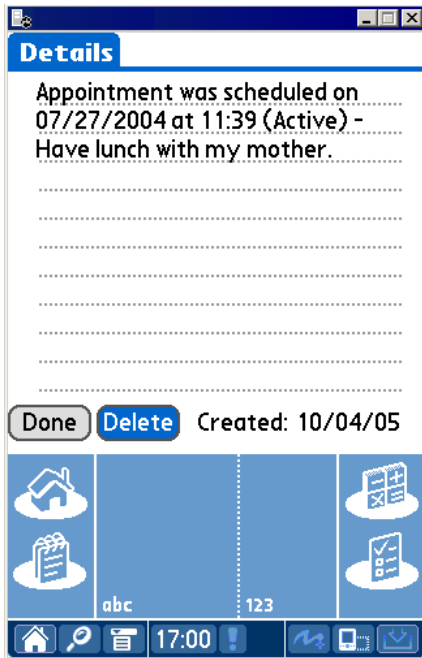
2. Tap **New** to display the Details tab.



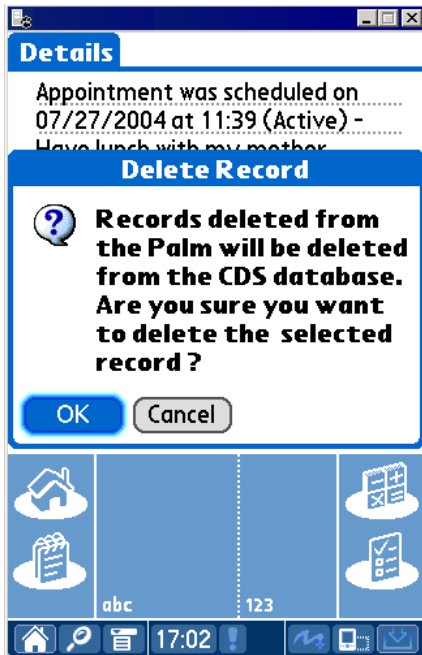
3. Enter the SmartPad note and then tap **Done** to save the additions.

Deleting a SmartPad Note

1. From the Contact View tab, tap **Contact View** and then select **SmartPad** from the drop-down list to display the SmartPad tab.
2. Tap the SmartPad note for deletion to open the Details tab.



3. Tap **Delete** to open the Delete Record dialog box.



4. Tap **OK** to delete the selected record from the Palm device and the server.

Policy Menu

E-Z Mobile is used to display the Policies, Policy Details, Interested Parties and Totals tabs on the Palm device.

Note: Policy information cannot be added, modified or deleted from the Palm device. The information is read-only.

Accessing Policy Information

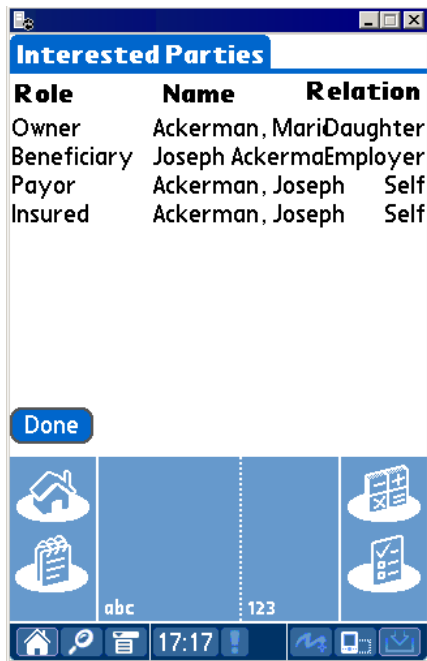
1. From the Contact View tab, tap **Contact View** and then select **Policies** from the drop-down list to display the Policies tab.

| Plan | A. Prem | Benefit |
|------------------|---------|-----------|
| Variable Appreci | 3,600 | 695,700 |
| Assurable Life | 5,000 | 198,673 |
| Maximizer II | 1,450 | 400,000 |
| Preferred Plan | 455 | |
| Defender | 651 | 6,000 |
| LNL 10 Term | 1,450 | 1,000,000 |
| Overhead Expen | 4,127 | 4,000 |
| Universal Cover | 2,500 | 1,000,000 |
| Whole New Com | 4,000 | 100,000 |
| American Level | 1,800 | 500,000 |

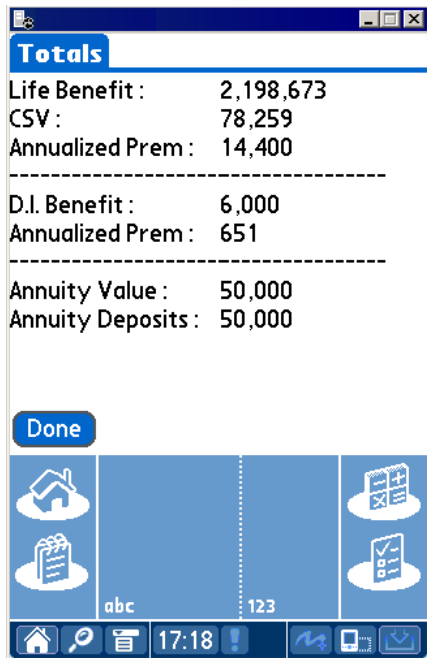
2. Tap the policy to display the Policy Details tab.

| | |
|------------|----------------------|
| Plan Name | Variable Appreciable |
| Carrier | Prudent Insurance |
| Policy # | 920342372 |
| PlanType | UVL |
| PolicyDate | 10/07/02 |
| Status | Submitted |
| Mode/Prem | Annual 3600 |
| Basic Face | 600,000 |
| NetDB | 695,700 |
| Cash Value | 5,424 |

3. Tap the **IntPrty** icon to display the Interested Parties tab.



4. Tap **Done** and then tap **Done** again to return to the Policies tab.
5. Tap the **Totals** icon to display the Totals tab.



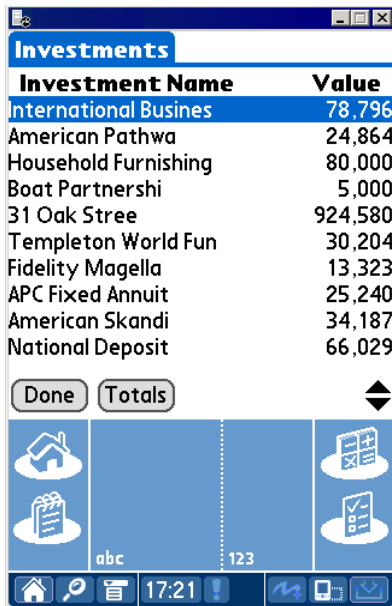
Investments

E-Z Mobile is used to display the Investments, Investment Details and Investment Totals tabs on the Palm device.

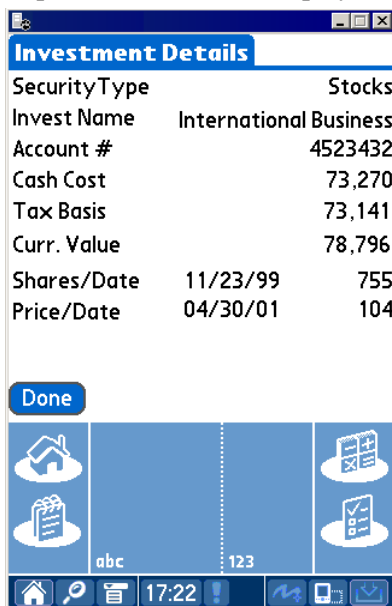
Note: The Investment Details tab is intended to display investments with share and cost information. The Variable Annuity information is limited due to this restriction. The investment information is read-only.

Accessing Investment Information

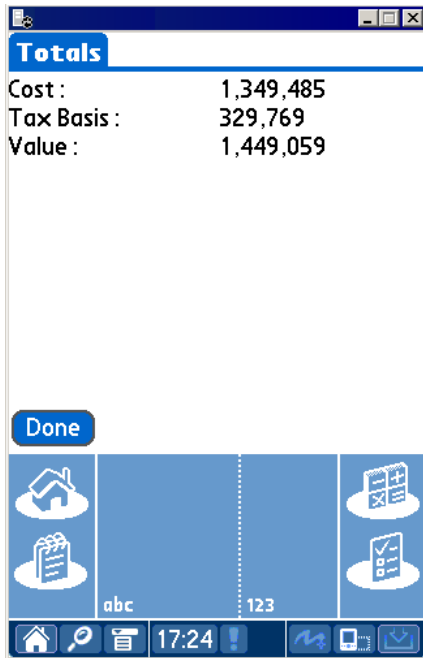
1. From the Contact View tab, tap **Contact View** and then select **Investments** from the drop-down list to display the Investments tab.



2. Tap the investment to display the Investment Details tab.



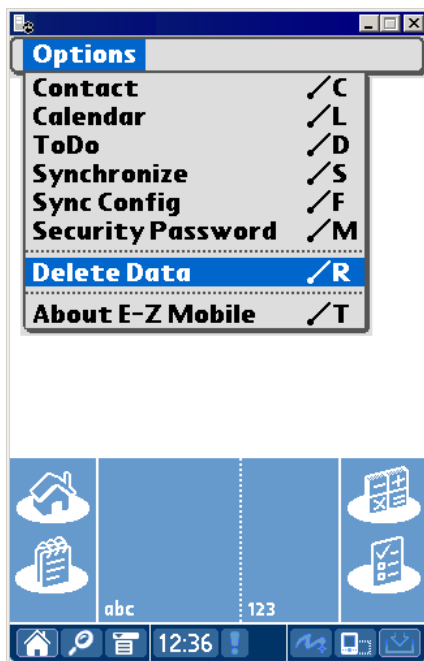
3. Tap **Done** and then tap **Totals** to display the Investment Totals tab.



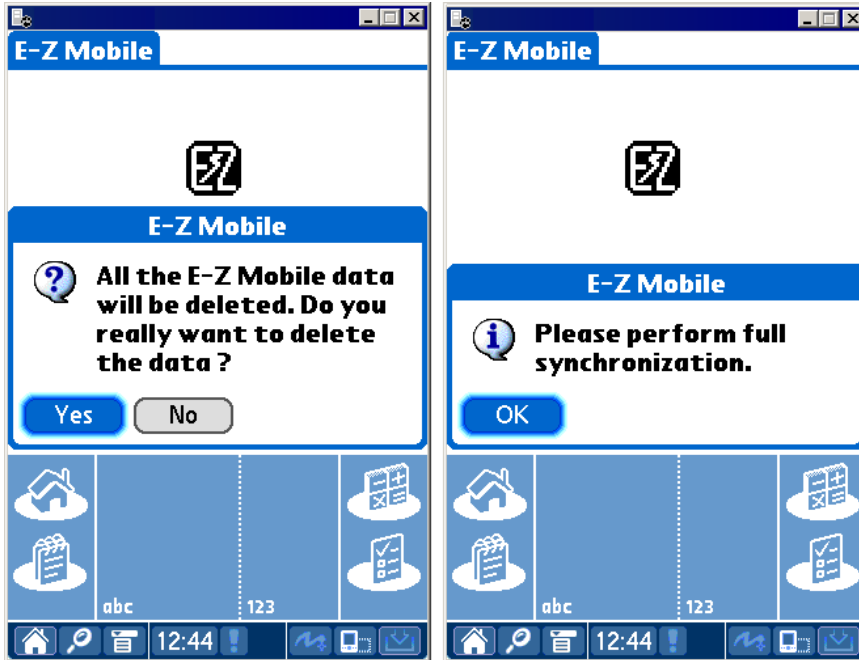
Delete E-Z Mobile Data Using the Delete Data Option

CDS 6.0 now features the ability to remove all E-Z Mobile data from the Palm device without having to reinstall the application.

1. Select **Delete Data** from the **E-Z Mobile** tab drop-down list to open the E-Z Mobile dialog box.



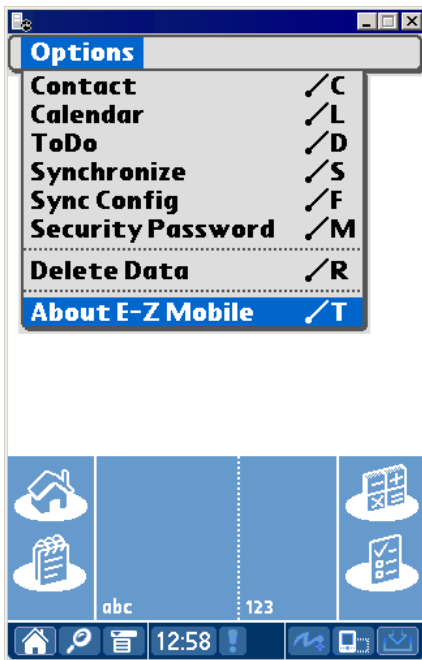
2. Tap **Yes** to delete the E-Z Mobile data and then tap **OK** in the E-Z Mobile information dialog box.



Note: Users must perform a full synchronization after deleting E-Z Mobile data.

About E-Z Mobile

1. Select **About E-Z Mobile** from the **E-Z Mobile** tab drop-down list to open the About E-Z Mobile tab.



2. Tap **OK** to close the About E-Z Mobile tab.

