



Client Data System®
E-Z Mobile for Pocket PC
User Guide



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Introduction

E-Z Mobile for Pocket PC® is a robust custom application that E-Z Data developed for devices running the Microsoft Pocket PC® operating system. Using iAnywhere Solutions' Ultralite database with MobiLink Server, E-Z Mobile for Pocket PC is used to synchronize Client Data System® (CDS) with Pocket PC devices without interfering with existing information.

The following records can be synchronized:

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

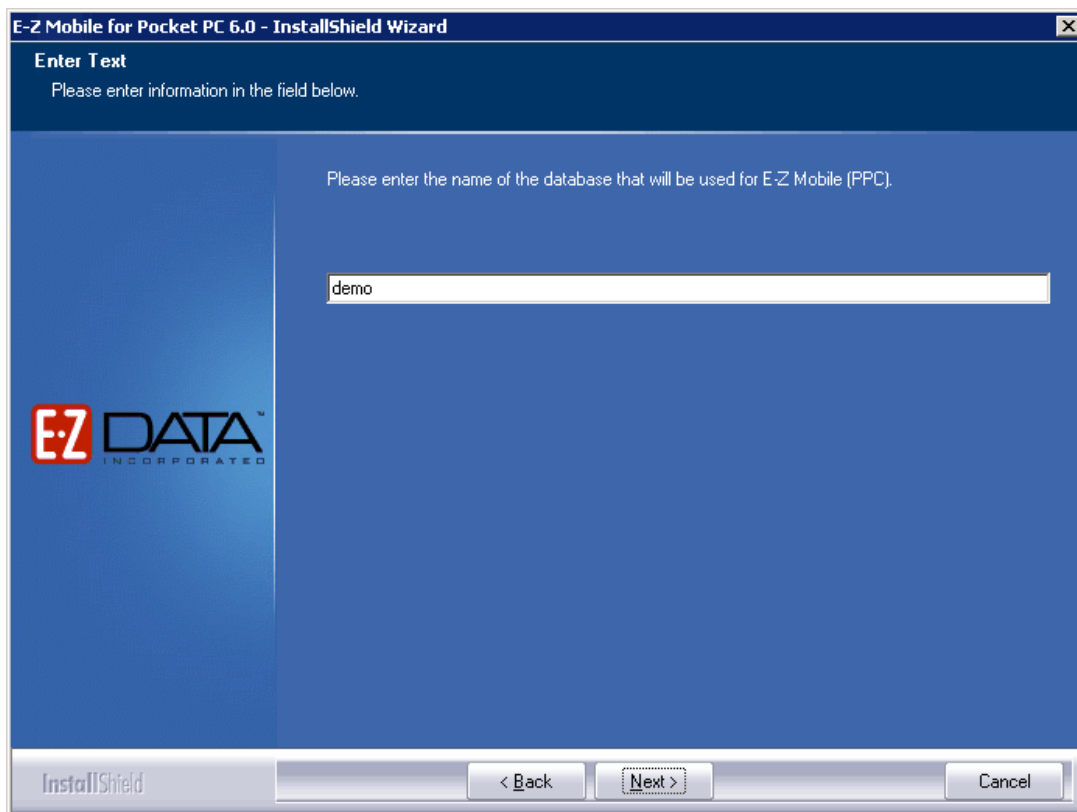
Pre-Installation Checklist

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

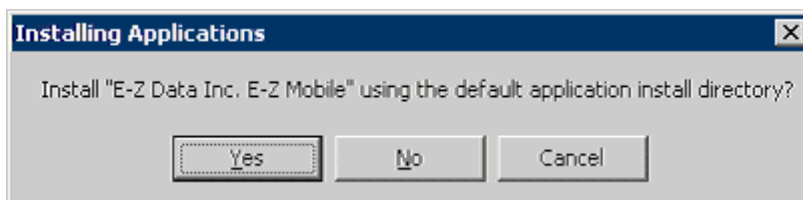
- CDS version 6.0 or later must be installed on the system (stand-alone or workstation).
- Install Microsoft® ActiveSync® software for the Microsoft Pocket PC-compatible device that will be used with the E-Z Mobile program.
- Verify that the Pocket PC-compatible device is connected with Microsoft ActiveSync version 3.7.1 or higher.
- 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.)
- Perform a Synchronization operation to verify connectivity and backup data on the handheld device.
- Use the Remove Programs utility in Microsoft's Pocket PC device settings to uninstall E-Z Data, Inc. E-Z Mobile 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 - Pocket PC** 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 - Pocket PC** option in **Module Preferences** is selected for the user who will synchronize data between CDS and E-Z Mobile for Pocket PC. Refer to the Help 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 Pocket PC

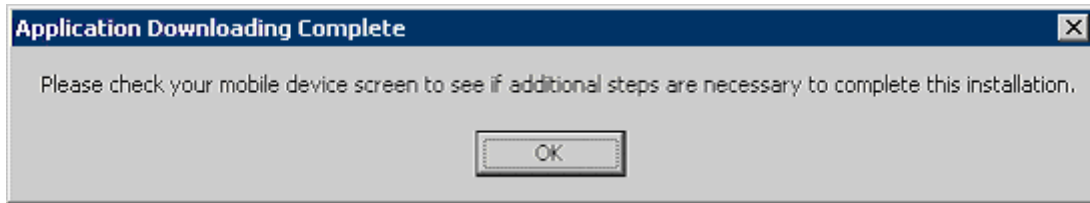
1. Insert the CDS 6.0 CD into the computer's CD-ROM drive.
2. Cancel the Installation Wizard if it opens automatically and then open **My Computer**.
3. Right-click on the CD drive and then select **Explore**.
4. Double-click the **CDS** folder.
5. From the CDS folder, double-click the **E-Z Mobile PPC 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 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.



8. In the Pocket PC Installation dialog box, click the **Next** button.
9. Select the **I accept the terms in the license agreement** option and then click **Finish** to open the Installing Applications dialog box.
10. Click the **Yes** button to install the E-Z Mobile application using the default application install directory.



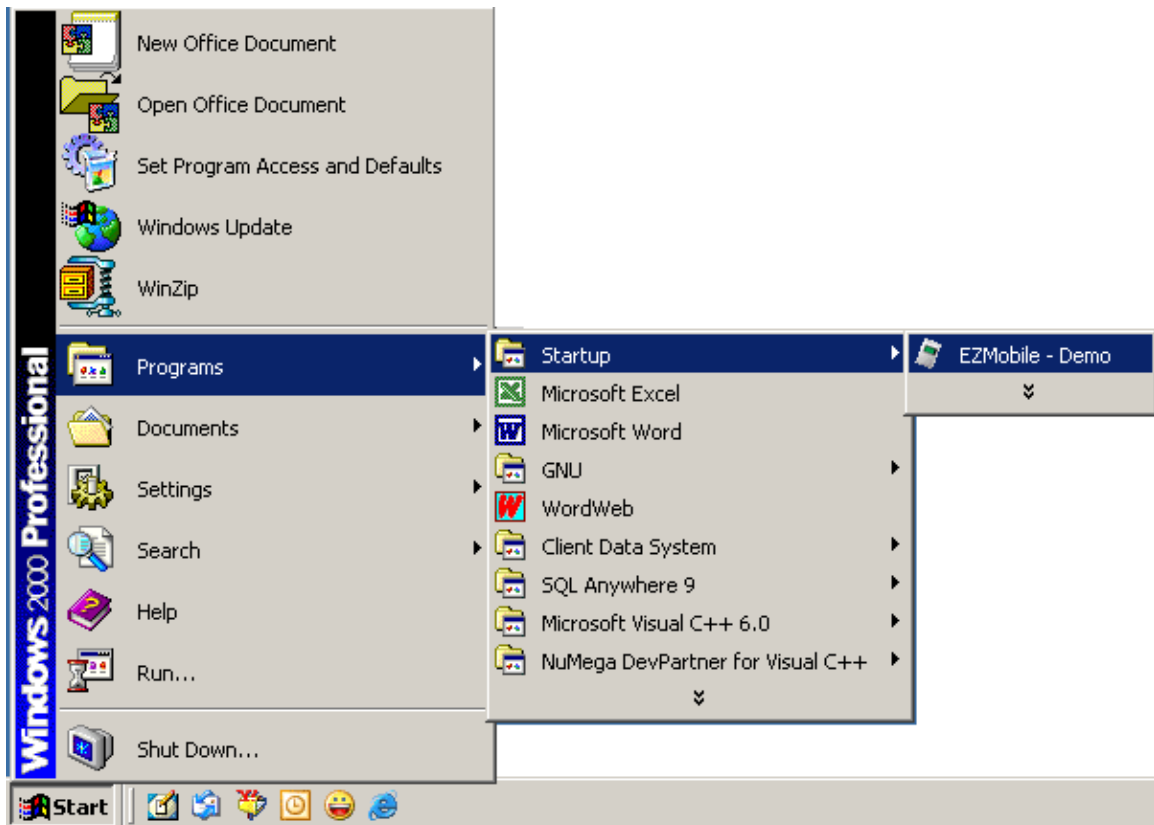
11. Click **OK** in the Application Downloading Complete dialog box.



12. Click the **Finish** button from the installation wizard.

Starting the Mobilink Server

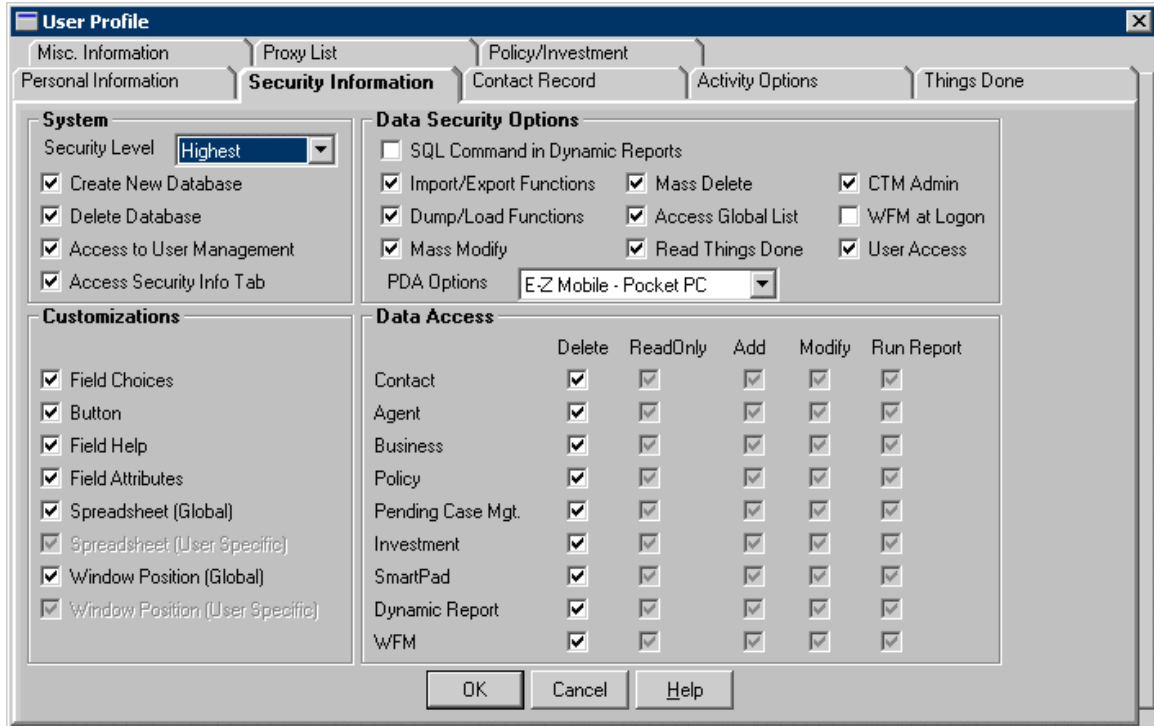
1. Click **Start, Programs, Startup**, and then select **EZMobile - Demo** to start the MobiLink server.



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

Enabling E-Z Mobile for Pocket PC

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 – Pocket PC** option from the PDA Options drop-down list.

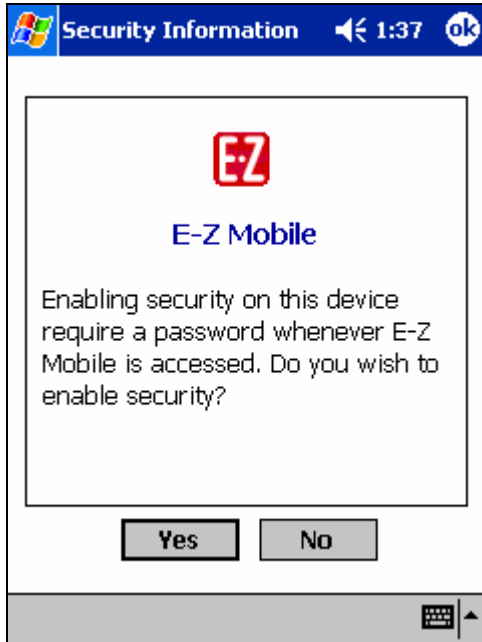
Accessing E-Z Mobile on the Pocket PC Device

From the **Start** menu, tap the **E-Z Mobile** icon.

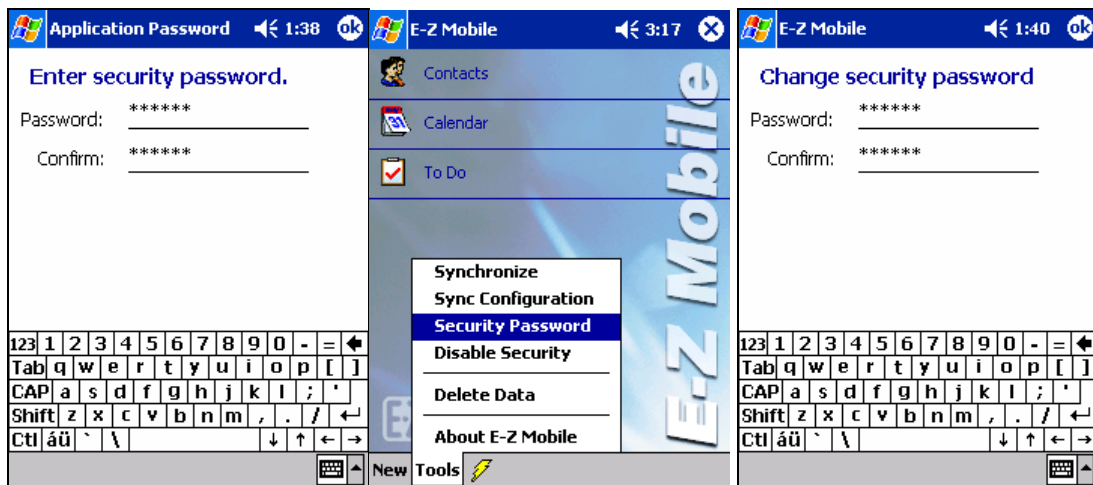


Running E-Z Mobile for the First Time

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.

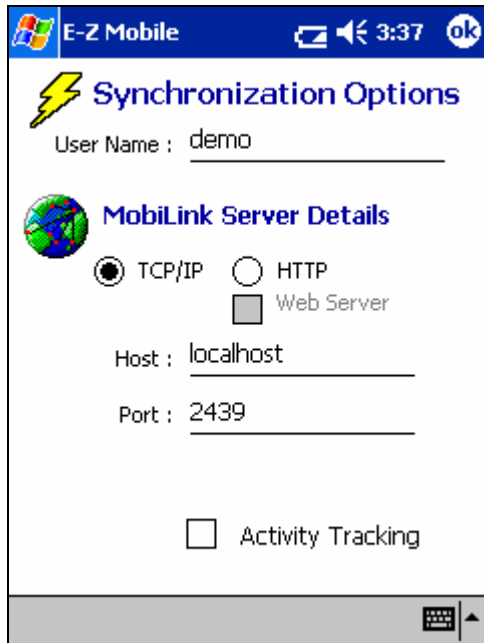


1. Click the **Yes** button to enable security and display the Application Password dialog box.
Note: The password is required each time E-Z Mobile is accessed. The password must be at least 6 characters with at least one alpha and one numeric character. The password can be changed at any time by accessing the **Security Password** option from the E-Z Mobile **Tools** menu.



2. Enter the password and then tap the **OK** button.

- From the E-Z Mobile main screen, tap **Tools** and then tap **Sync Configuration** to open the Synchronization Options screen.

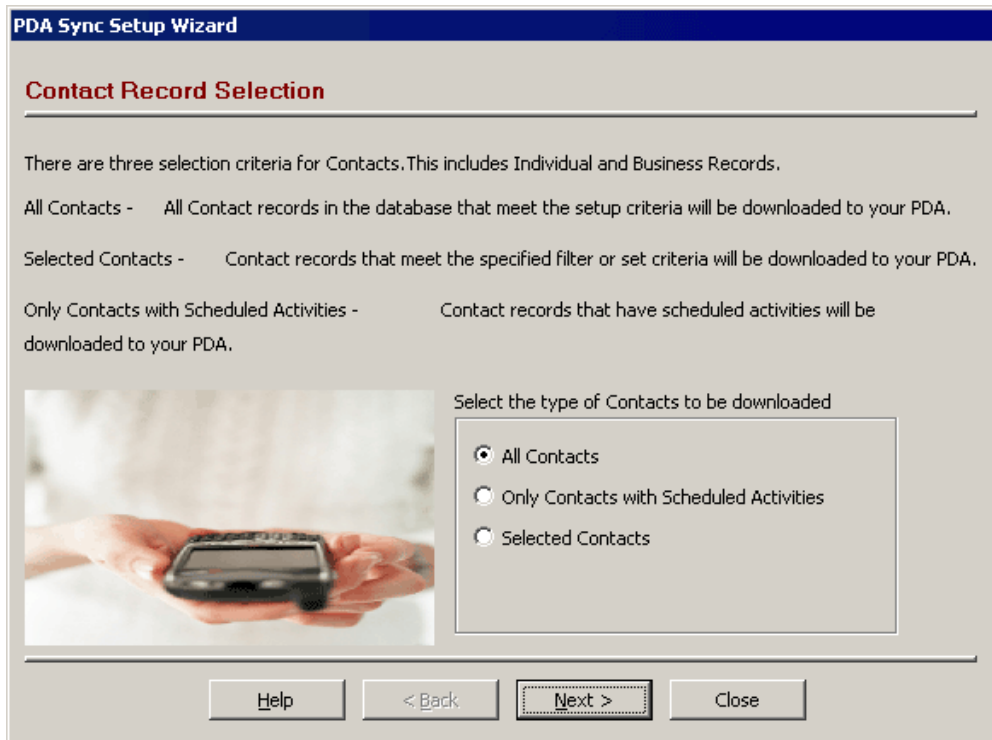


- Specify the appropriate Synchronization and MobiLink Server information.
 - User Name:** CDS User Name.
 - Protocol:** Select the communication protocol used to communicate with the MobiLink Server. The options are TCP/IP, HTTP, or HTTP using a Web server. An additional option is displayed when HTTP is selected. This information will be provided by E-Z Data for CDS Mobile users and by the IT department of corporate implementations.
 - Host:** Enter the IP address of the MobiLink server.
 - Port:** Enter the Communication Port. This information is provided by E-Z Data for CDS users and by the IT department of corporate implementations.
 - Activity Tracking:** If Activity Tracking is being used with CDS, select the **Activity Tracking** option to enable Activity Outcomes when tracking activities.

After the initial setup is completed, perform an ActiveSync operation to synchronize the data with the E-Z Mobile for Pocket PC database on the Pocket PC device.

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.



PDA Sync Setup Wizard

Contact Record Selection

There are three selection criteria for Contacts. This includes Individual and Business Records.

All Contacts - All Contact records in the database that meet the setup criteria will be downloaded to your PDA.

Selected Contacts - Contact records that meet the specified filter or set criteria will be downloaded to your PDA.

Only Contacts with Scheduled Activities - Contact records that have scheduled activities will be downloaded to your PDA.

Select the type of Contacts to be downloaded

- All Contacts
- Only Contacts with Scheduled Activities
- Selected Contacts

Buttons: Help, < Back, Next >, Close

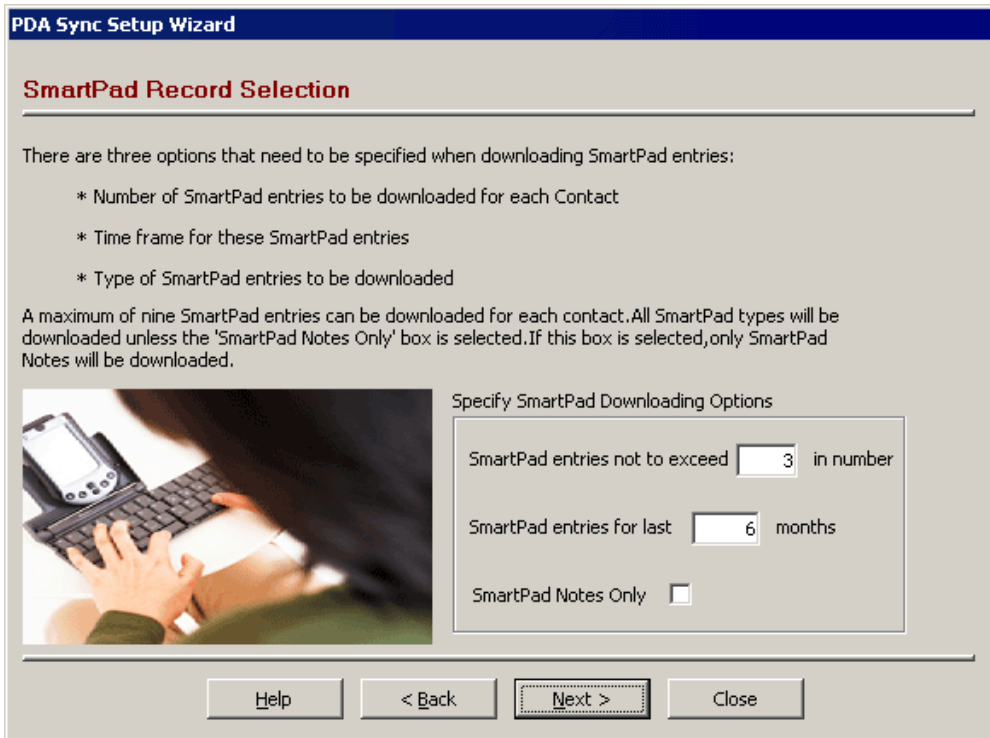
4. Choose the appropriate synchronization option and then click **Next** to open the Activity Record Selection dialog box.

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

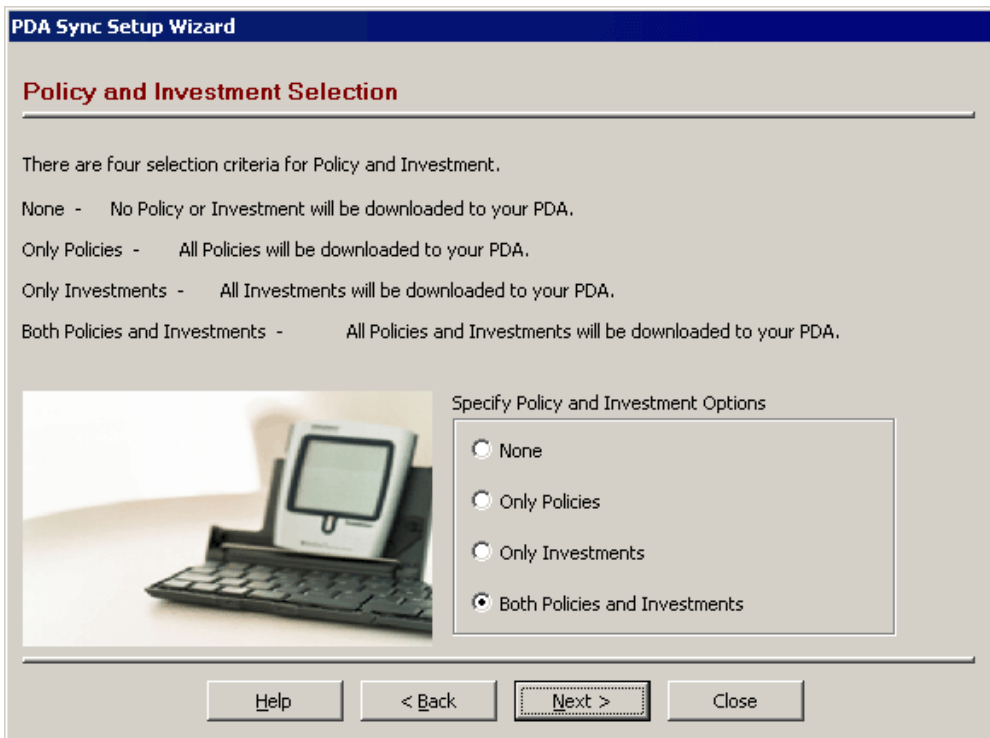
The screenshot shows a dialog box titled "PDA Sync Setup Wizard" with a sub-header "Activity Record Selection". The text inside explains three selection criteria: "All", "Timed", and "Untimed". It provides instructions on how to specify a date range for downloading activities. On the left, there is a small image of two women looking at a mobile device. On the right, there is a form with a dropdown menu set to "All", and two input fields for "Next" (30 days) and "Previous" (15 days). At the bottom, there are four buttons: "Help", "< Back", "Next >" (which is highlighted with a dashed border), and "Close".

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

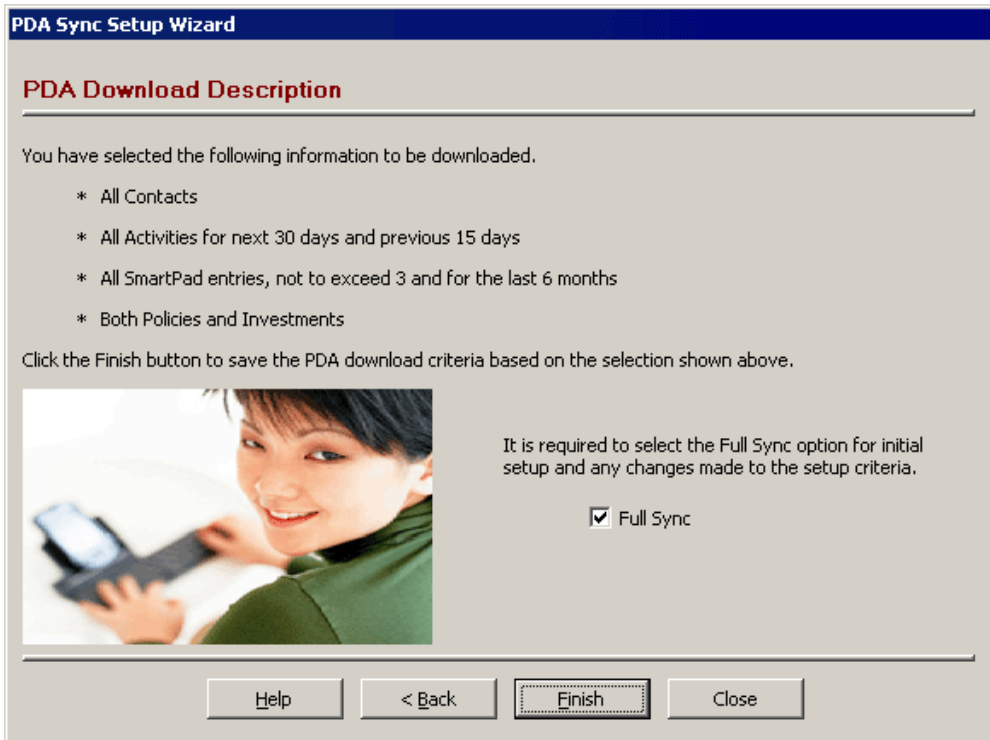
6. Specify a date range of future and past activities for synchronization and then click **Next** to display the SmartPad Record Selection dialog box.



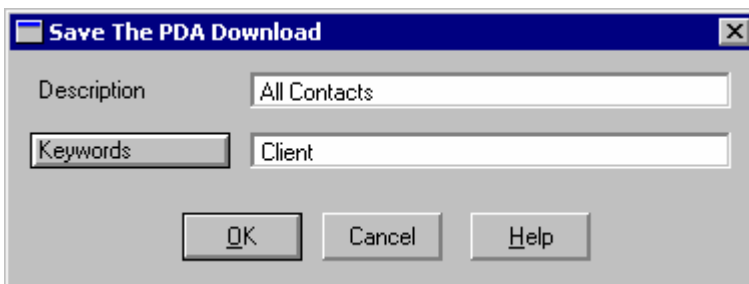
7. Specify the SmartPad Downloading Options and then click **Next** to open the Policy and Investment Selection dialog box.



- 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 an ActiveSync operation.
- When the ActiveSync 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 an ActiveSync operation to synchronize the data with the E-Z Mobile database on the Pocket PC device.
3. After the initial synchronization, double-click the saved sync criteria record to open the PDA Download Description dialog box.

PDA Download Description

Description: All Contacts

Contact Record Selection
Select the type of Contacts to be downloaded
 All Contacts
 Only Contacts with Scheduled Activities
 Selected Contacts
Set: []

Activity Record Selection
Select the type of Activities to be downloaded
All
Specify Date Range for downloading Activities
Next: 30 Previous: 15 days

SmartPad Selection
Specify SmartPad Downloading Options
SmartPad entries not to exceed 3 in number
SmartPad entries for last 6 months
SmartPad Notes Only
 Full Sync

Policy and Investment Selection
Specify Policy and Investment Option
 None
 Only Policies
 Only Investments
 Both Policies and Investments

OK Cancel

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

E-Z Mobile Main Screen

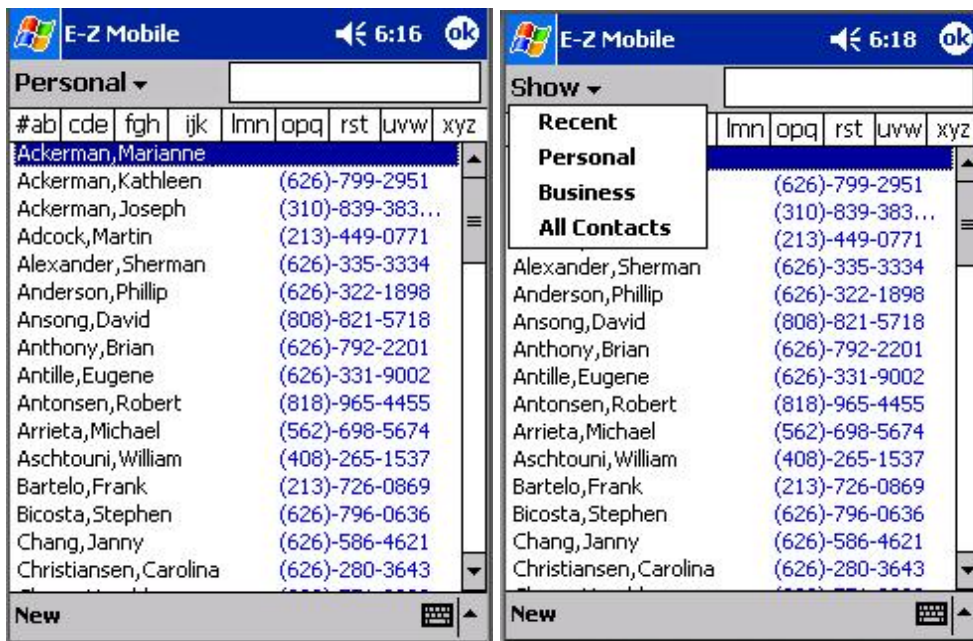
When E-Z Mobile opens after the initial setup and synchronization is complete, the application opens to the E-Z Mobile main screen. Tap the **Main** tab to access the menu.



- **Contacts:** Add a new Contact record and view existing Contact records.
- **Calendar:** Add an Activity and view existing Activity information.
- **To Do's:** Add a To Do and view existing To Do information.
- **New:** Add new Contacts, Activities and To Do items.
- **Tools:** Displays the Synchronize, Sync Configuration, Security Password, Enable/Disable Security, Delete Data and About E-Z Mobile options.

Contacts

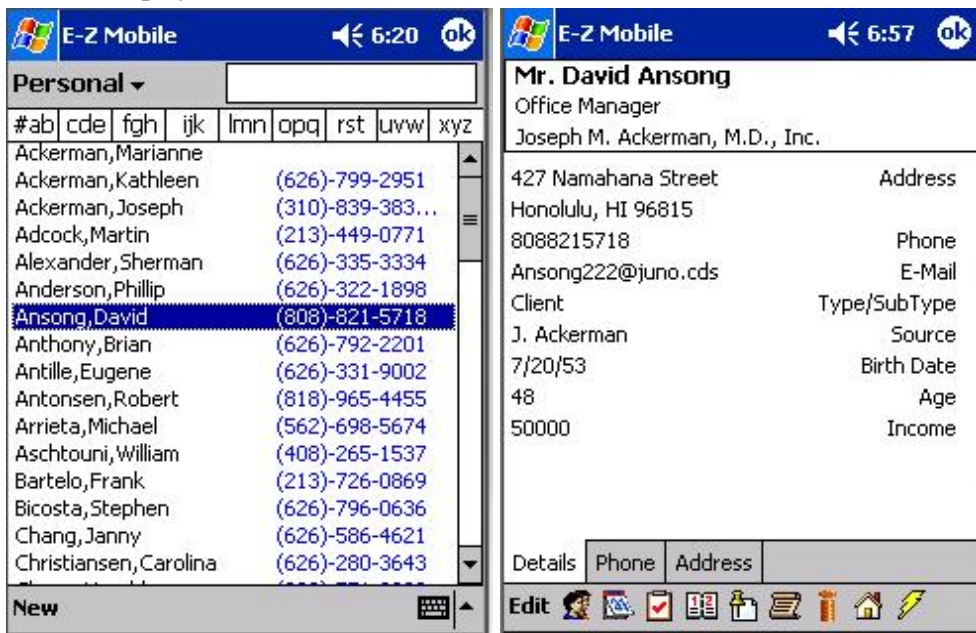
Select **Contacts** from the E-Z Mobile Main screen to display the Personal (Individual) Contact Summary screen. The Contact Summary screen can display records in four different categories: Recent, Personal, Business and All Contacts. Tap the **Personal** drop-down arrow to access these options.



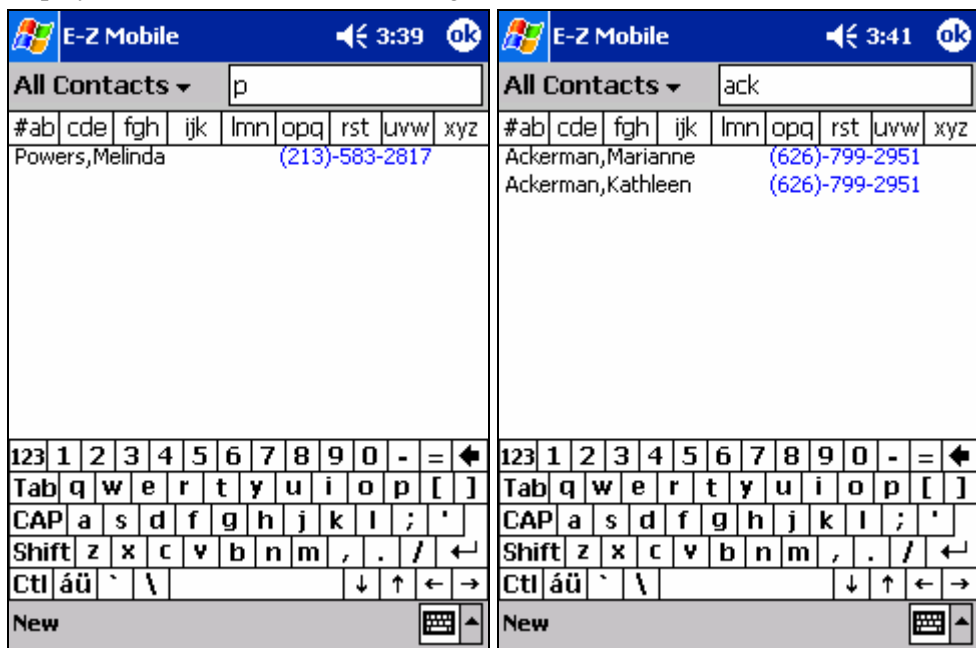
- **Recent:** Only the recently added or changed records (Individual Contacts and Business Contacts) display.
- **Personal:** Individual Contact records display.
- **Business:** Business Contact records display.
- **All Contacts:** Individual Contact and Business Contact records display.

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

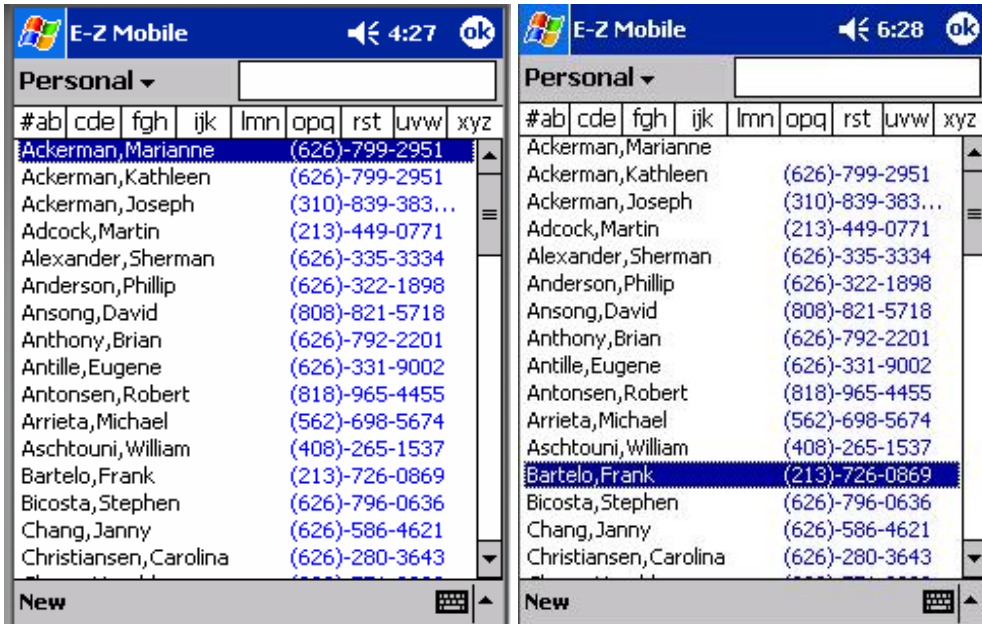
- Use the vertical scrollbar to scroll up and down the Contact list. Tap the applicable Contact name to display the Details tab.



- Enter a portion of the business name or individual contact's last name in the Search field to display the Contact record(s) matching the search criteria.



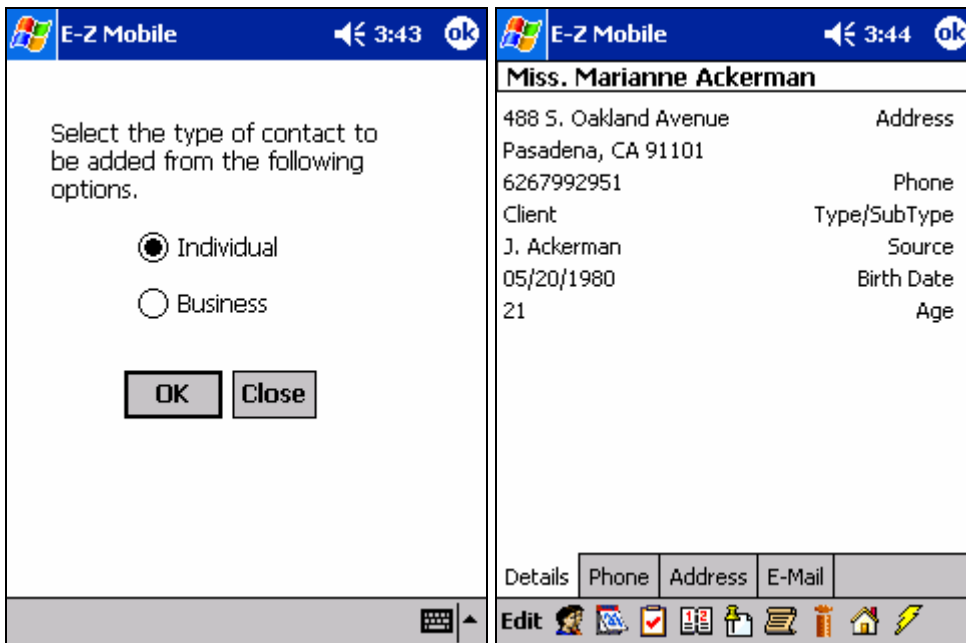
- Tap the applicable alphabet tab to find a Contact record. Tap **#ab**, to highlight the first Contact whose last name begins with 'A'; tap **#ab** again to highlight the first Contact whose last name begins with 'B'.



Creating a New Contact Record

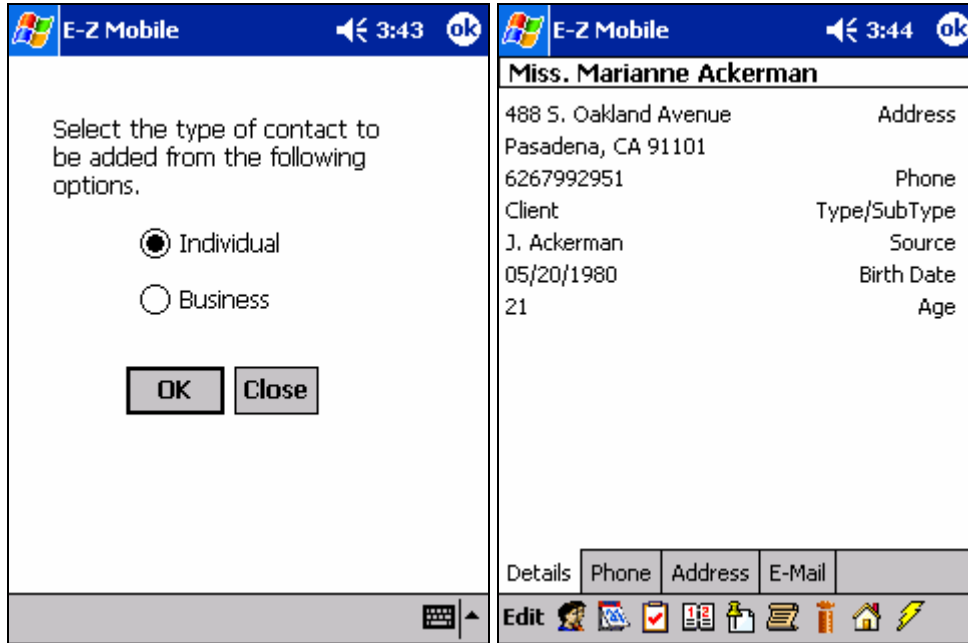
From the Contact Summary

1. Select **Contacts** from the E-Z Mobile main screen to open the Personal (Individual) Contact Summary.
2. Tap **New** to open the Record Type dialog box.
3. Select the **Individual** option and then tap **OK**.
4. Enter the contact information and then tap **OK** to display the Details tab.



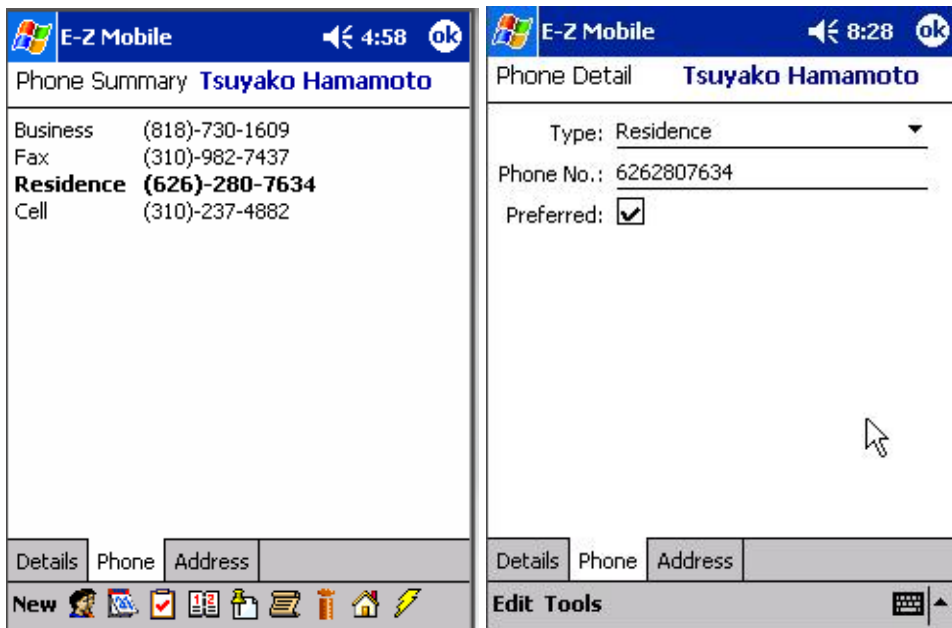
From the New Menu

1. From the **New** menu, tap **Contacts**.
2. Select the **Individual** option and then tap **OK**.
3. Enter the contact information and then tap **OK** to display the Details tab.



Contact Phone Number

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



Contact Address

1. From the Contact Details tab, tap the **Address** tab to display the Address Summary.
2. Tap **New** to open the Address Detail dialog box.
3. Tap the **Type** drop-down arrow to specify the address type.
4. Enter the remaining address information and then tap **OK** to save the additions.
Note: Both the Preferred Phone Number and Preferred Address are displayed on the Contact Details tab.

The left screenshot shows the 'Address Summary' for 'Martin Adcock'. The address is '4430 Pico Blvd., Los Angeles, CA 90002'. The right screenshot shows the 'Address Details' form for 'Adcock, Martin'. The address type is 'Business'. The address line 1 is '4430 Pico Blvd.'. The city is 'Los Angeles', the state is 'CA', the country is 'USA', and the zip is '90002'. The 'Preferred' checkbox is checked.

Modifying a Contact Record

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

The left screenshot shows the 'Details' tab for 'Mr. Martin Adcock'. The contact information includes: Name: Mr. Martin Adcock, Title: President, Address: 4430 Pico Blvd., Los Angeles, CA 90002, Phone: 2134490771, E-Mail: Marty@sinustries.cds, Client: S. Thompson, Source: S. Thompson, Birth Date: 1/11/33, Age: 68, Income: 85000. The right screenshot shows the 'Edit' form for 'Adcock, Martin'. The fields are: Name: Adcock, Martin, Greeting: Marty, Title: Mr., Contact Type: (empty), Sub Type: (empty), Source: S. Thompson, Category: Client, Birth Date: 01/11/1933, Age: 71, Employer: Smith Industries, ..., Occupation: President, Job Title: (empty).

Modifying a Contact Phone Number

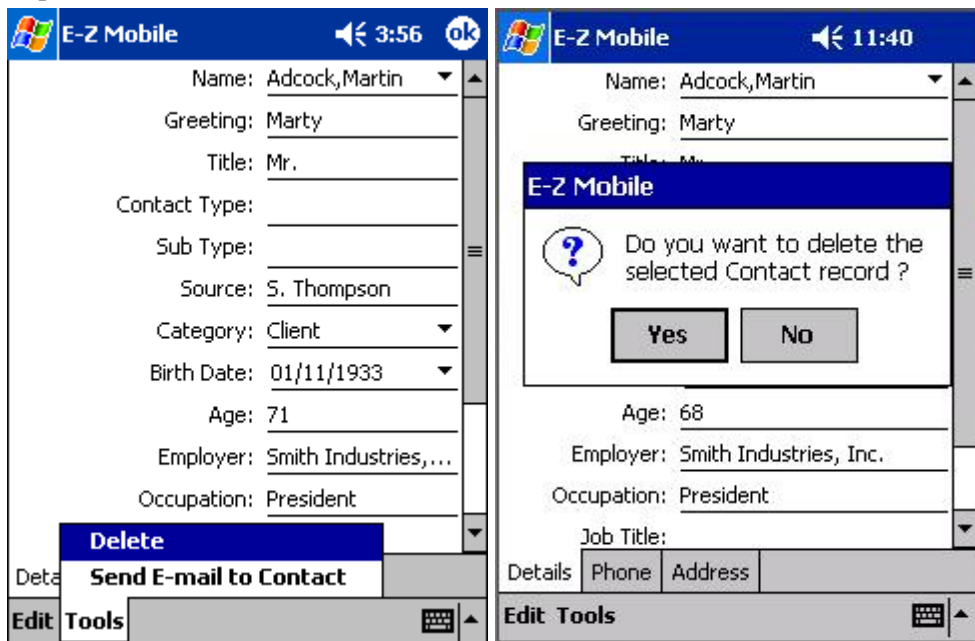
1. From the Contact Details tab, tap the **Phone** tab to open the Phone Summary.
2. Tap the number for modification to open the Phone Detail dialog box.
3. Modify the information as necessary and then tap **OK** to save the changes.

Modifying a 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.

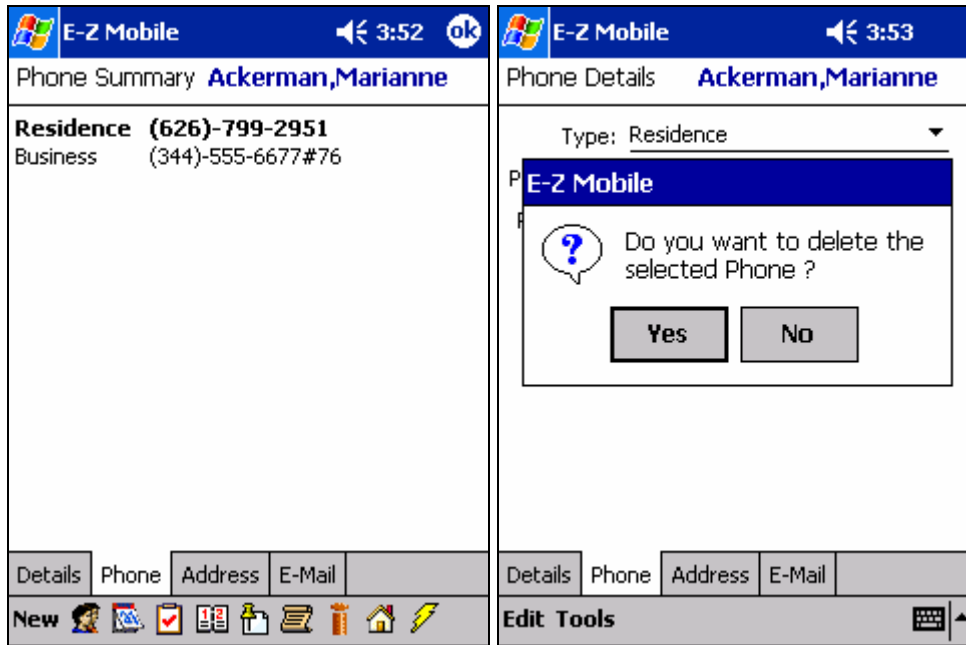
Deleting a Contact Record

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



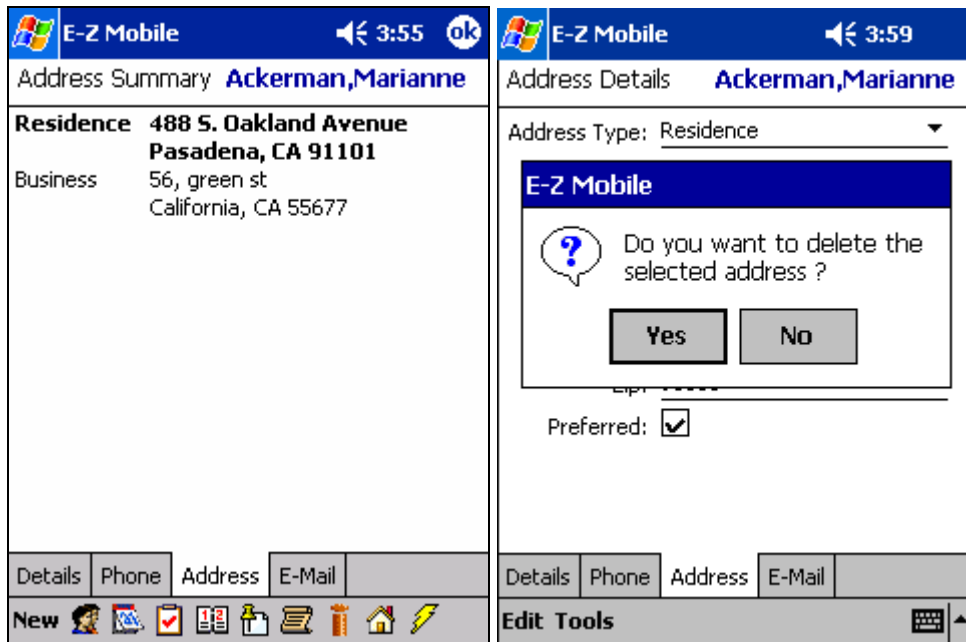
Deleting a Contact Phone Number

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 then select **Delete** to display the confirmation dialog box.
4. Tap **Yes** to delete the selected phone number.



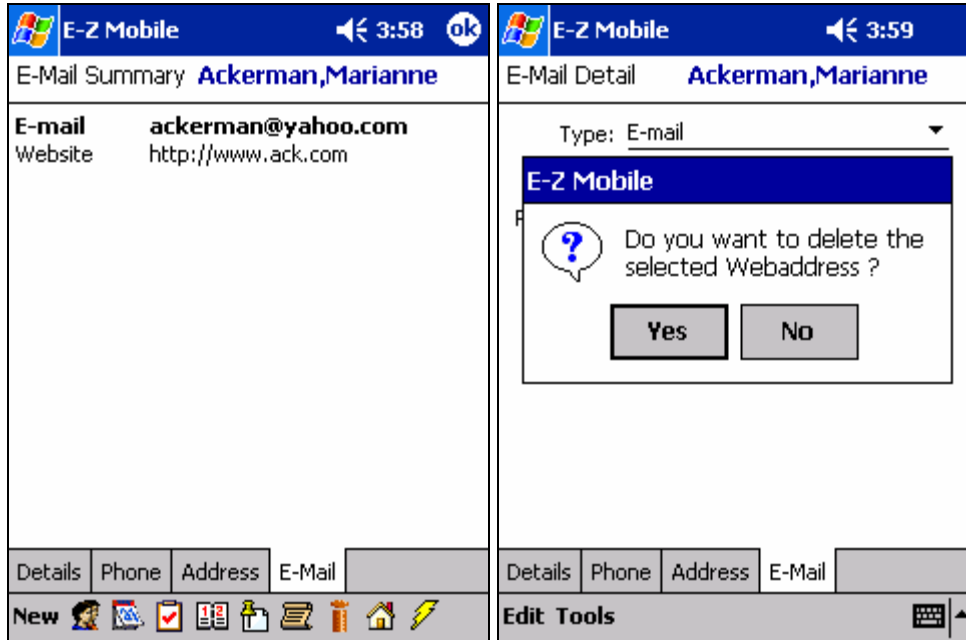
Deleting a Contact Address

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 then select **Delete** to display the confirmation dialog box.
4. Tap **Yes** to delete the selected address.



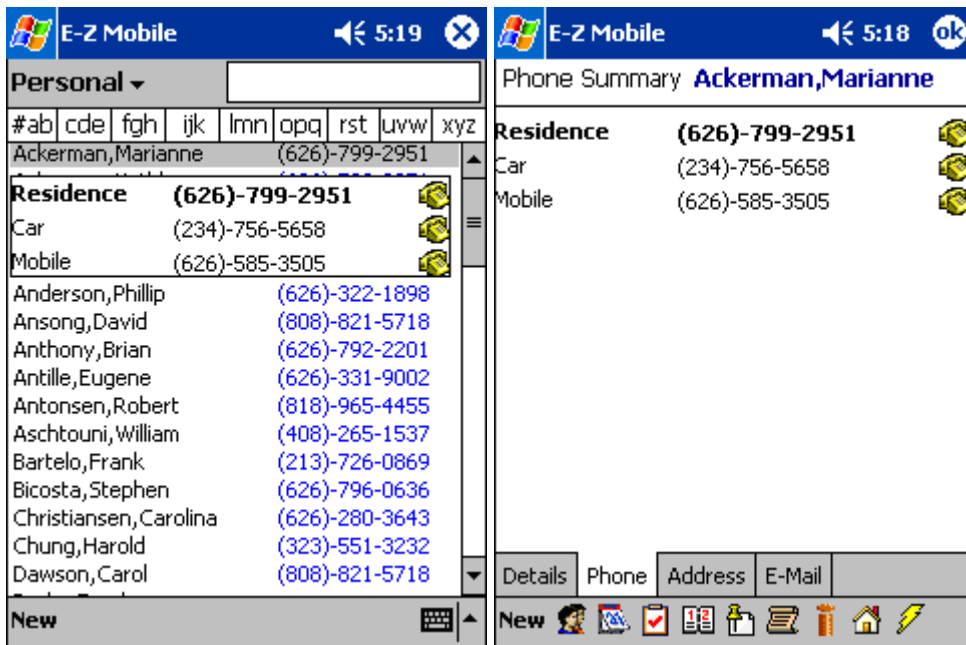
Deleting a Contact E-mail/Web Address

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 then select **Delete** to display the confirmation dialog box.
4. Tap **Yes** to delete the selected address.



Dial a Contact Phone Number (Only on Phone Enabled Devices)

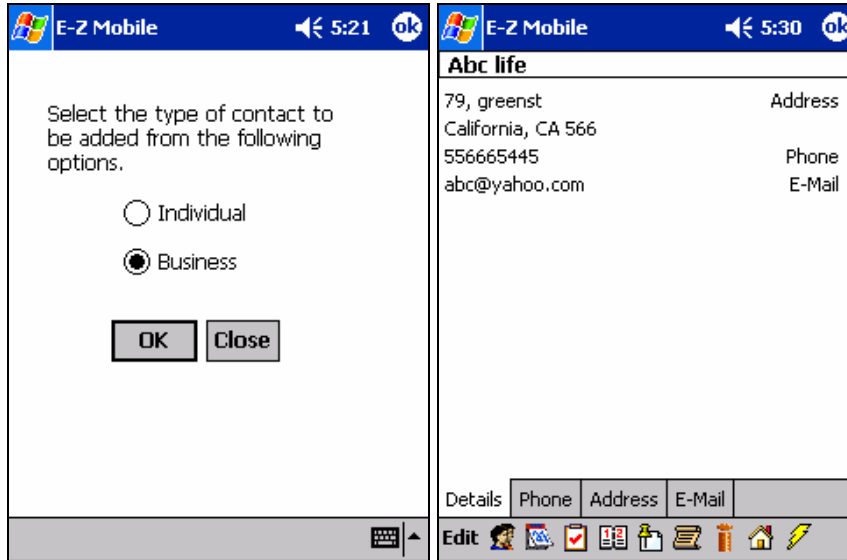
- From the Contact Summary screen, tap the applicable contact phone number to display the list of phone numbers. Tap the **Dial** button to dial that particular phone number.
- From the Phone Summary screen, tap the **Dial** button to dial a phone number.



Creating a New Business Record

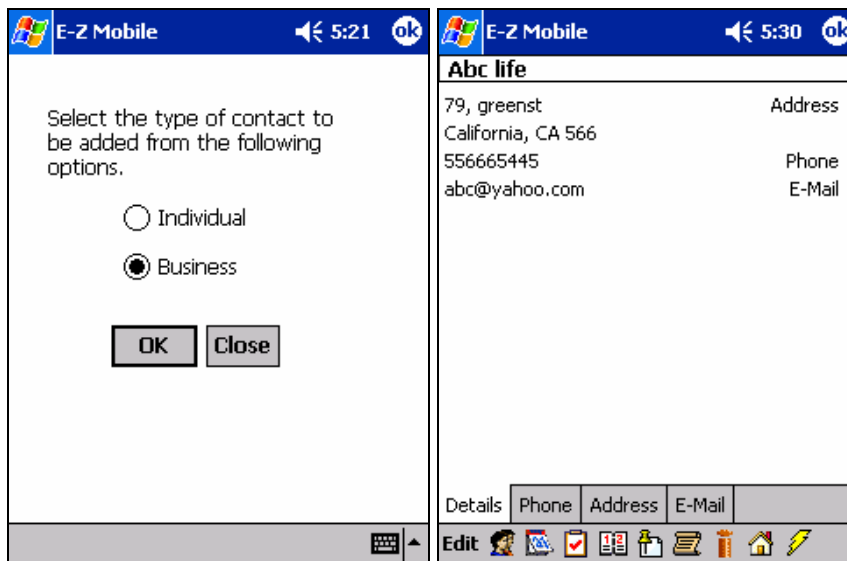
From the Contact Summary

1. Select **Contacts** from the E-Z Mobile main screen to display the Personal (Individual) Contact Summary.
2. Tap **New** to open the Record Type dialog box.
3. Select the **Business** option and then tap **OK** to display the Edit 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 Details tab.



From the New Menu

1. Select **Contact** from the **New** menu.
2. Tap **New** to open the Record Type dialog box.
3. Select the **Business** option and then tap **OK**.
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 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 Summary.
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 Details tab.

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 Phone Number* section.

Modifying a Business Address

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

Deleting a Business Record

1. From the Contact Details tab, tap **Edit** to open the Details tab.
2. Tap **Tools** and then select **Delete** to display the confirmation dialog 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 then select **Delete** to display the 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 then select **Delete** to display the 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 then select **Delete** to display the confirmation dialog box.
4. Tap **Yes** to delete the selected address.

Calendar

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

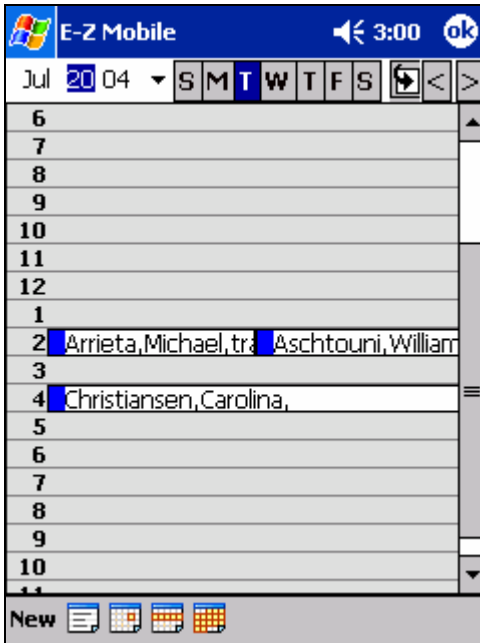
AgendaView

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.



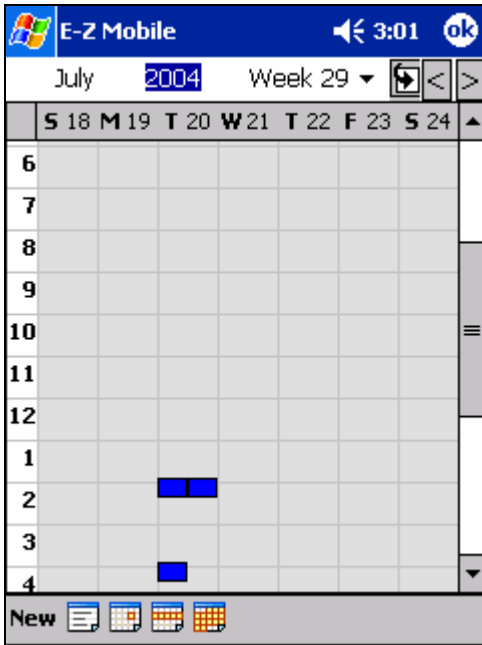
DayView

Select **Calendar** from the E-Z Mobile Main screen 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.



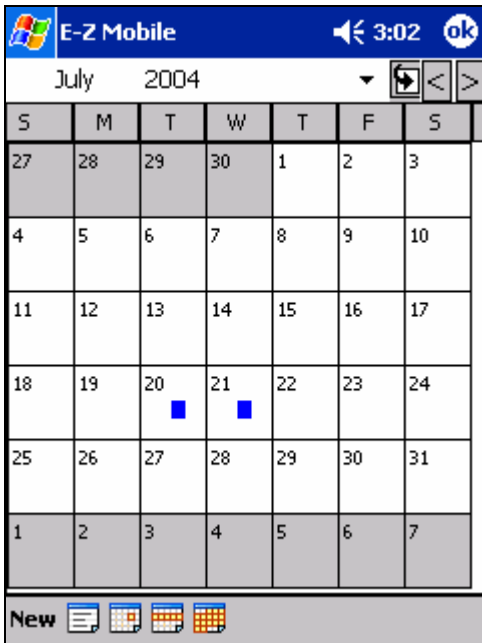
WeekView

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.



Adding an Activity from the Calendar

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

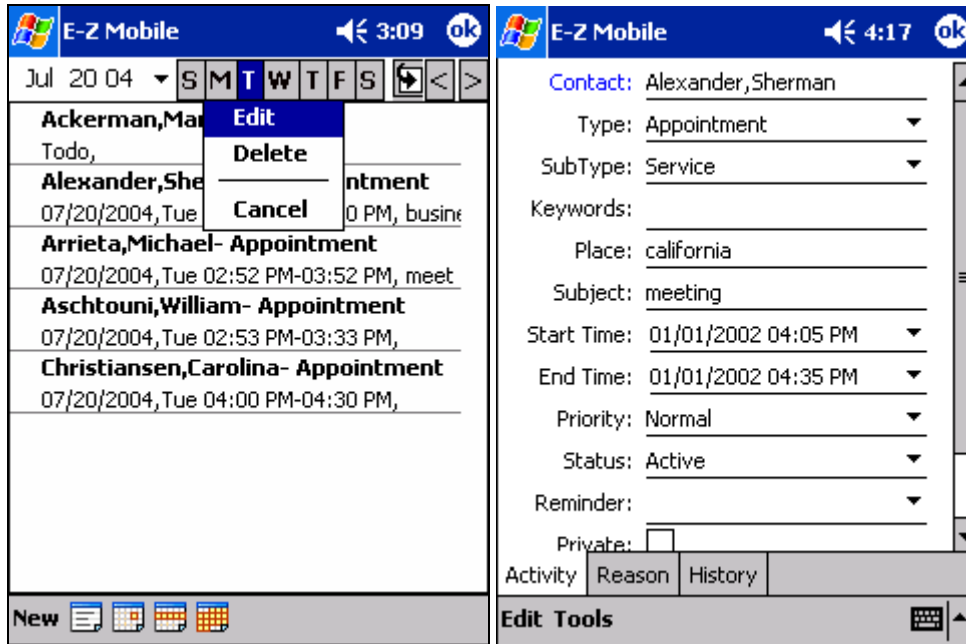
The image displays two screenshots of the E-Z Mobile application interface for adding an activity. The left screenshot shows the 'Activity' tab with the following fields: Contact: Alexander, Sherman; Type: Appointment; SubType: Service; Keywords: ; Place: california; Subject: meeting; Start Time: 01/01/2002 04:05 PM; End Time: 01/01/2002 04:35 PM; Priority: Normal; Status: Active; Reminder: ; Private: . The right screenshot shows the 'Reason' tab with a text area containing the text: 'meeting with client to discuss new insurance polices.'

Activity Components

- **Contact:** Tap the **Contact** hyperlink to link a contact to 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.
- **Keyword:** The user can enter a keyword for the activity.
- **Place:** Enter the location for the activity.
- **Subject:** Enter the Subject for the activity.
- **Start Time:** Specify the Start Time of the activity.
- **End Time:** Specify the End Time of the activity.
- **Priority:** Tap the **Priority** drop-down arrow to specify the priority.
- **Status:** Tap the **Status** drop-down arrow to display the activity status type list.
- **Reminder:** 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.
- **Reason:** The user can enter the reason of the activity in the **Reason** tab.
- **History:** Once an activity has been marked as **Done** and an activity outcome has been selected, an Activity History record will be created.

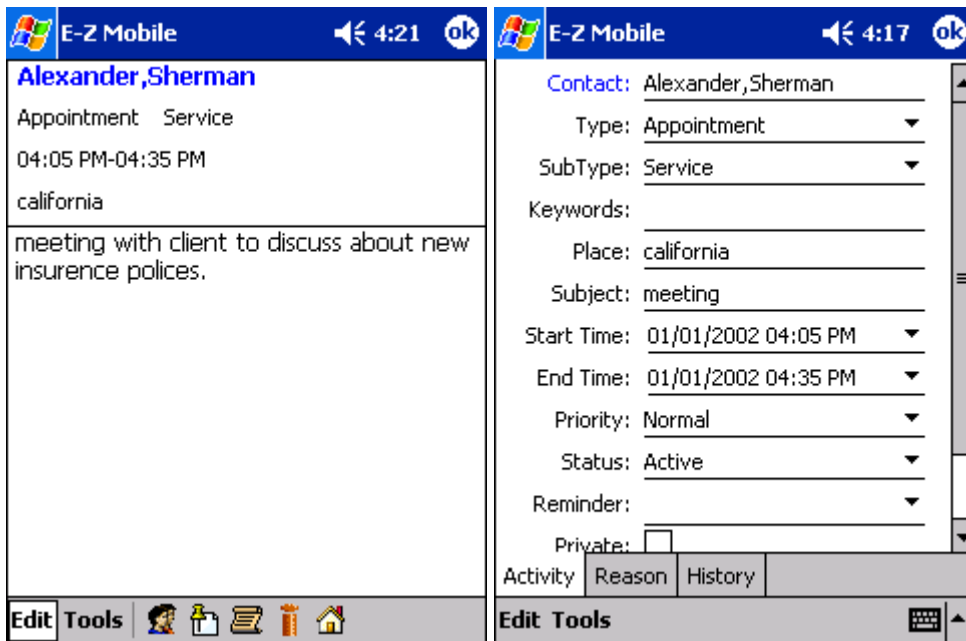
Modifying an Activity from the Calendar - AgendaView

1. Select **Calendar** from the E-Z Mobile main screen to open the AgendaView calendar, listing all the activities scheduled for the displayed date.
2. Hold the stylus down on an Activity to display an options menu.
3. Select **Edit** to open the Activity Details tab in edit mode.
4. Modify the information as necessary and then tap **OK** to save the changes.



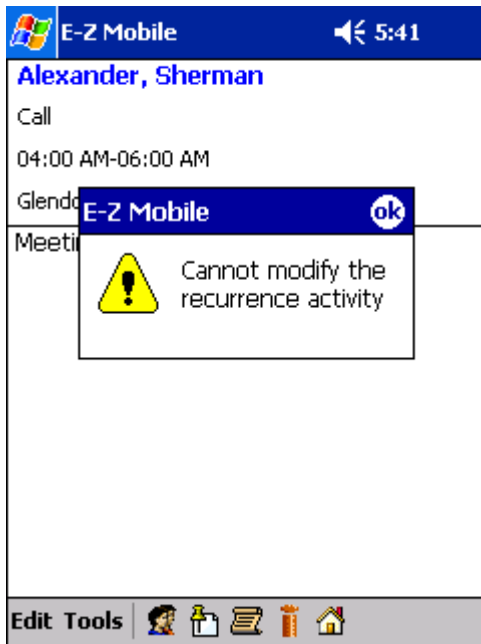
Modifying an Activity from the Activity Details Tab

1. Select **Calendar** from the E-Z Mobile main screen to open the AgendaView calendar.
2. Tap the Activity to be modified to display the Activity Detail tab in read-only mode.
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.



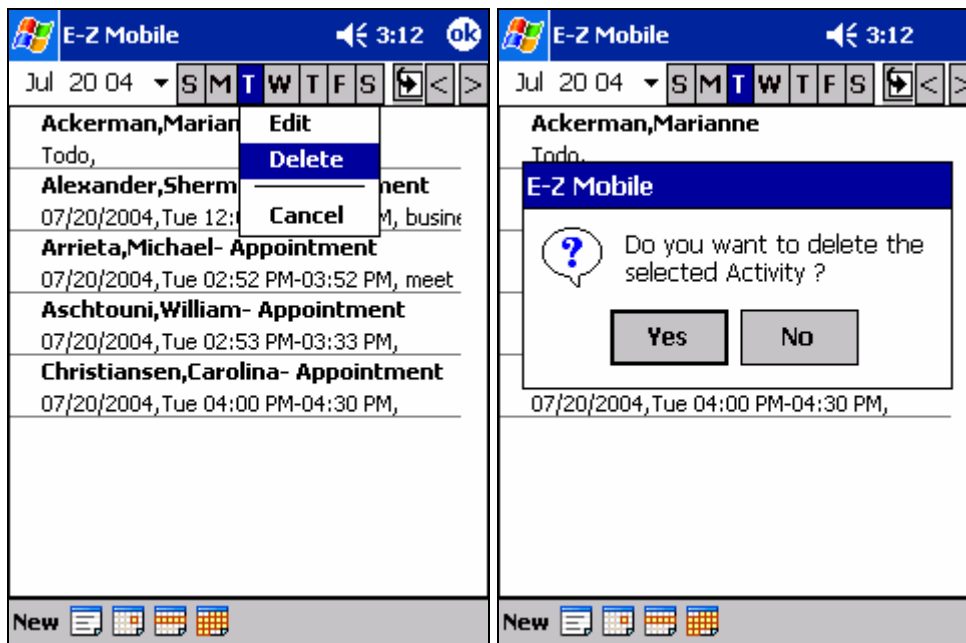
Recurring Activity

1. Recurring activities can be added only through CDS 6.0, from which the recurring activities can be downloaded to the E-Z Mobile Pocket PC application.
2. In E-Z Mobile Pocket PC, from the DayView calendar, tap an existing recurring activity.
3. The Activity Details screen opens; tap **Edit** to modify the recurring activity. The “Cannot modify the recurrence activity” message displays.



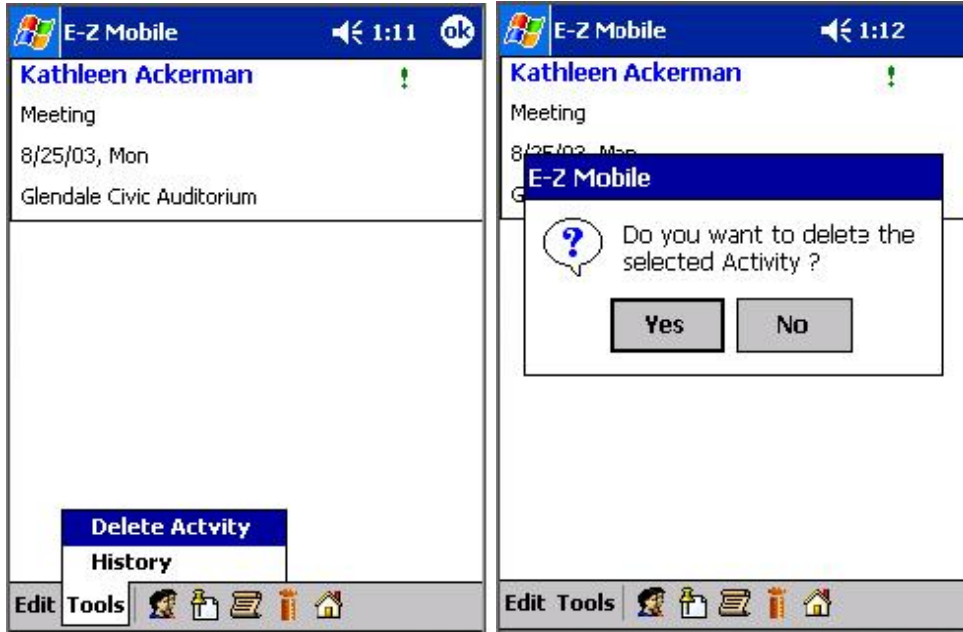
Deleting an Activity from the Calendar - Agenda View

1. Select **Calendar** from the E-Z Mobile main screen to open the AgendaView calendar.
2. Hold the stylus on an Activity to open an options menu.
3. Select **Delete** to open the delete record confirmation dialog box.
4. Tap **Yes** to delete the activity.



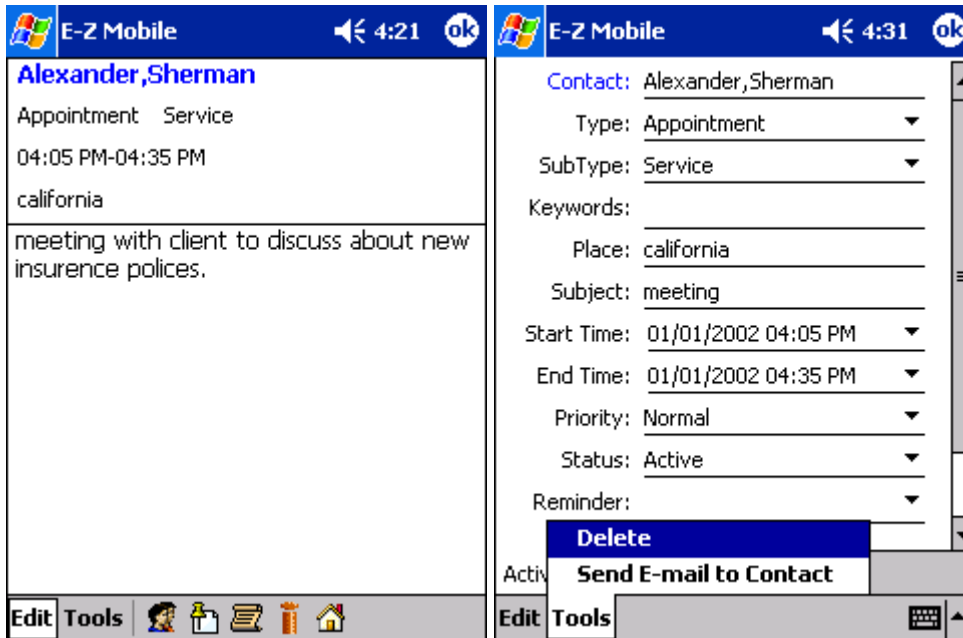
Deleting an Activity from the Activity Edit Tab (Read-only Mode)

1. Select **Calendar** from the E-Z Mobile main screen to open the AgendaView calendar.
2. Tap an activity to be deleted to display the Activity Detail tab in read-only mode.
3. Tap **Tools** and then select **Delete Activity** to open the confirmation dialog box.
4. Tap **Yes** to delete the activity.



Deleting an Activity from the Activity Edit Tab (Edit Mode)

1. Select **Calendar** from the E-Z Mobile main screen to open the AgendaView calendar.
2. Tap an activity to be deleted to display the Activity Detail tab in read-only mode.
3. Tap **Edit** to open the Activity Details tab in edit mode.
4. Tap **Tools** and then select **Delete** to display the delete record confirmation dialog box.
5. Select **Yes** to delete the activity.



ToDo

Select **ToDo's** from the E-Z Mobile main screen to open the untimed activities list.

Adding a ToDo Item

1. Select **ToDo's** from the E-Z Mobile main screen to open the untimed activities list.
2. Tap **New** to open the Activity Edit tab.
3. Enter the untimed activity information and then tap **OK** to save the activity.

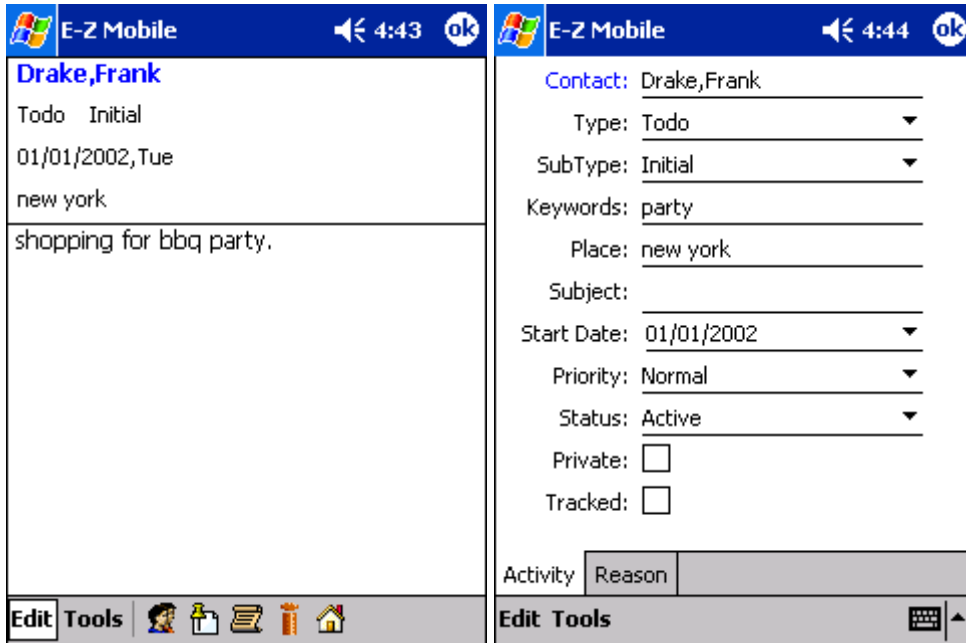
The image shows two side-by-side screenshots of the E-Z Mobile interface. The left screenshot shows the 'Add ToDo Item' form with the following fields: Contact: Drake, Frank; Type: Todo; SubType: Initial; Keywords: party; Place: new york; Subject: ; Start Date: 01/01/2002; Priority: Normal; Status: Active; Private: ; Tracked: . The right screenshot shows the 'ToDo List' for 'Drake, Frank' with the following items: Todo Initial, 01/01/2002, Tue, new york, shopping for bbq party.

Modifying a ToDo Item from the ToDo List

1. Select **ToDo's** from the E-Z Mobile Main screen to open the ToDo List.
2. Hold the stylus down on a **ToDo** to open an options menu.
3. Tap **Edit** to open the Activity Edit tab.
4. Make the modifications as necessary and then tap **OK** to save the changes.

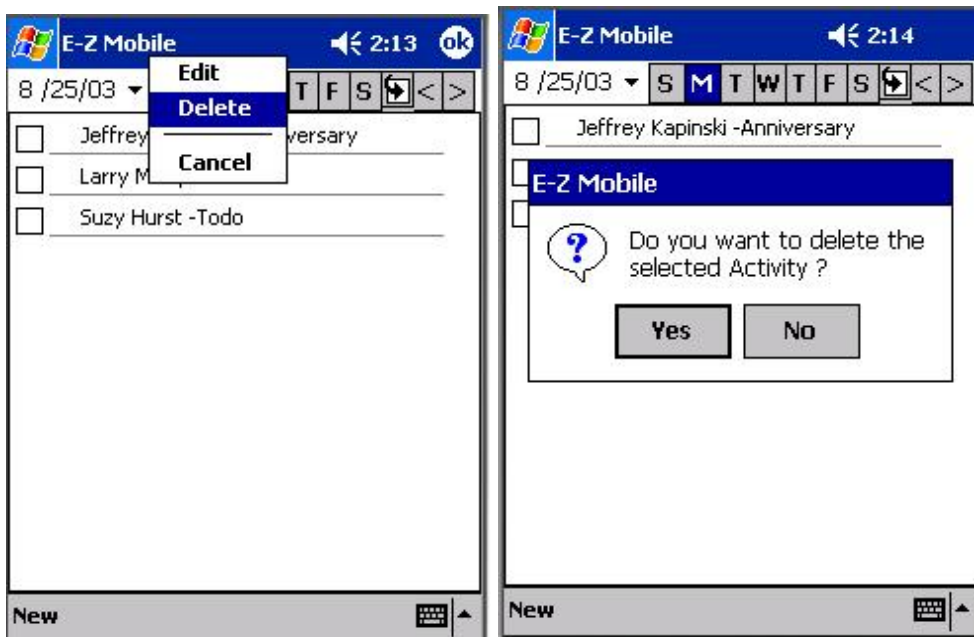
Modifying a ToDo from the Activity Edit Tab

1. Select **ToDo's** from the E-Z Mobile main screen to open the ToDo List.
2. Tap a **ToDo** to be modified to display the Activity Details tab in read-only mode.
3. Tap **Edit** to open the Activity Details tab in edit mode.
4. Make the modifications as necessary and then tap **OK** to save the changes.



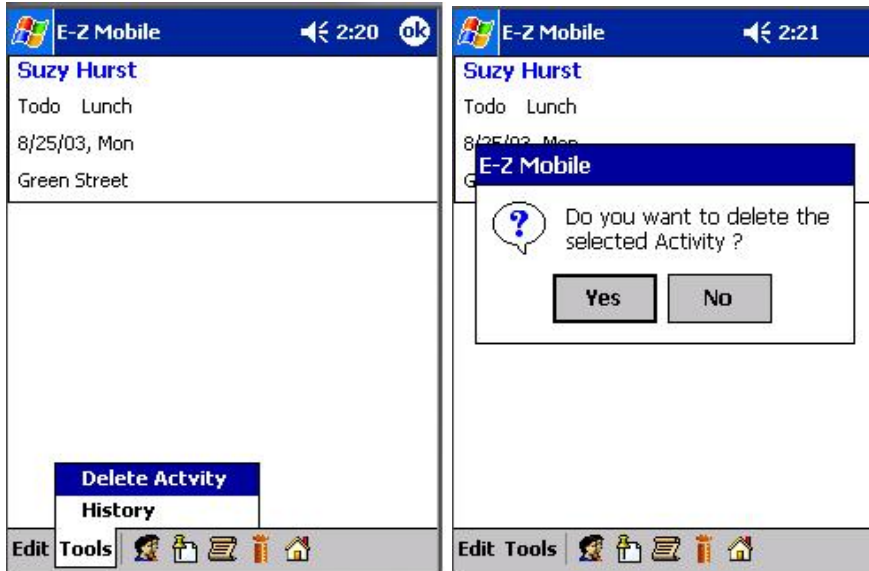
Deleting a ToDo from the ToDo List Tab

1. Select **ToDo's** from the E-Z Mobile main screen to open the ToDo List.
2. Hold the stylus down on a **ToDo** to open an options menu.
3. Select **Delete** to display the confirmation dialog box.
4. Tap **Yes** to delete the activity.



Deleting a ToDo from the Activity Details Tab

1. Select **ToDo's** from the E-Z Mobile main screen to open the ToDo List.
2. Tap a ToDo item to be deleted to display the Activity Details tab in read-only mode.
3. Tap **Tools** and then select **Delete Activity** to open the confirmation dialog box.
4. Tap **Yes** to delete the activity.



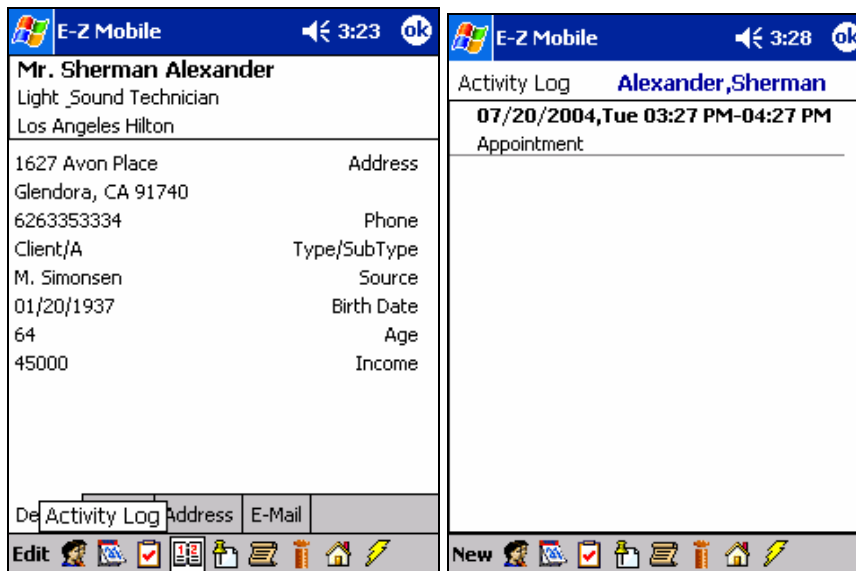
Activity Log

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

Adding a Timed Activity from the Activity Log

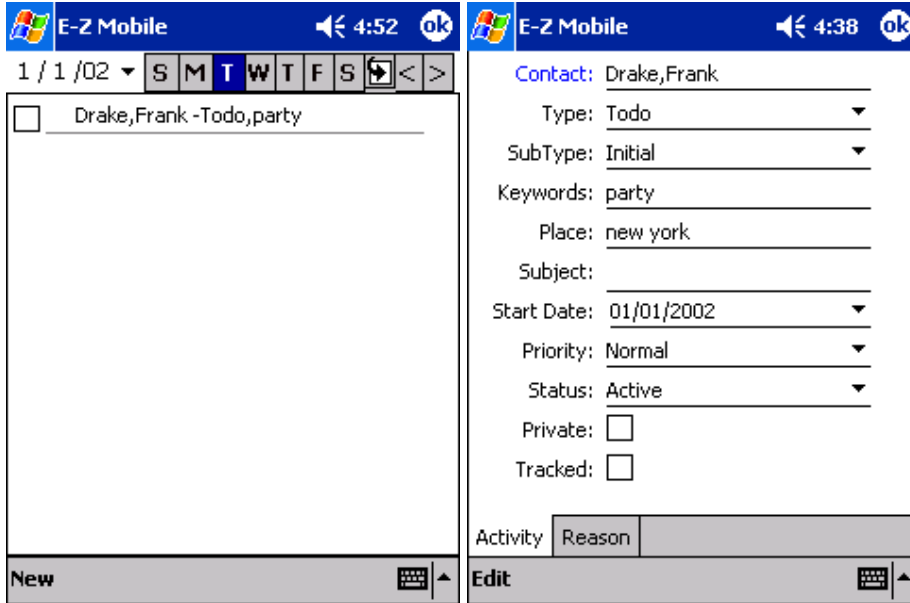
The process for adding an activity from the Calendar and the Activity Log is nearly identical. The main difference is that when adding an activity from the Activity Log, it is linked to a Contact.

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



Adding an Untimed Activity from the ToDo List

1. From the Contact Details tab, tap the **ToDo** icon to open the ToDo List.
2. Tap **New** to open the Activity Edit tab.
3. Enter the necessary information for the activity and then tap **OK** to add the activity to the ToDo list.

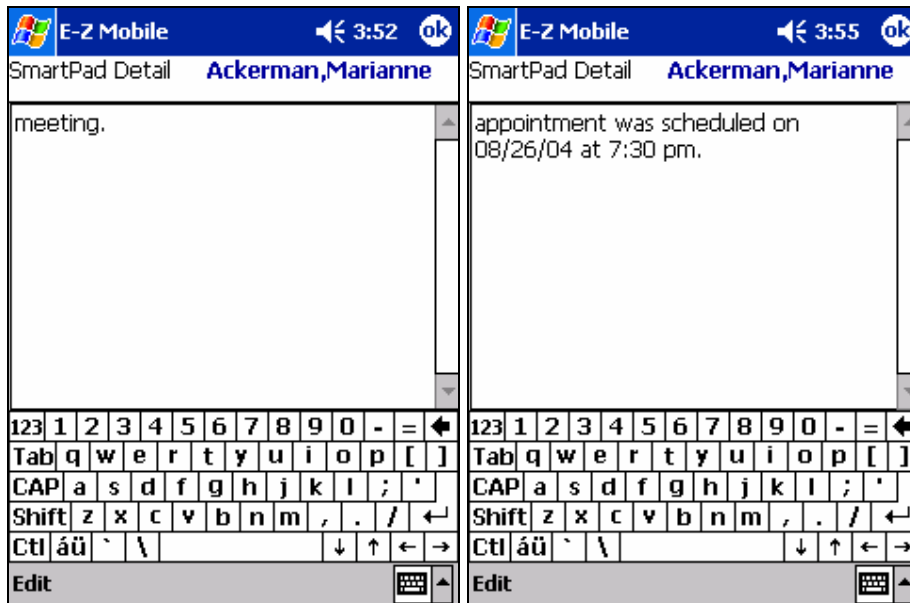


SmartPad

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 E-Z Mobile for Pocket PC that are not synchronized with CDS can be modified.

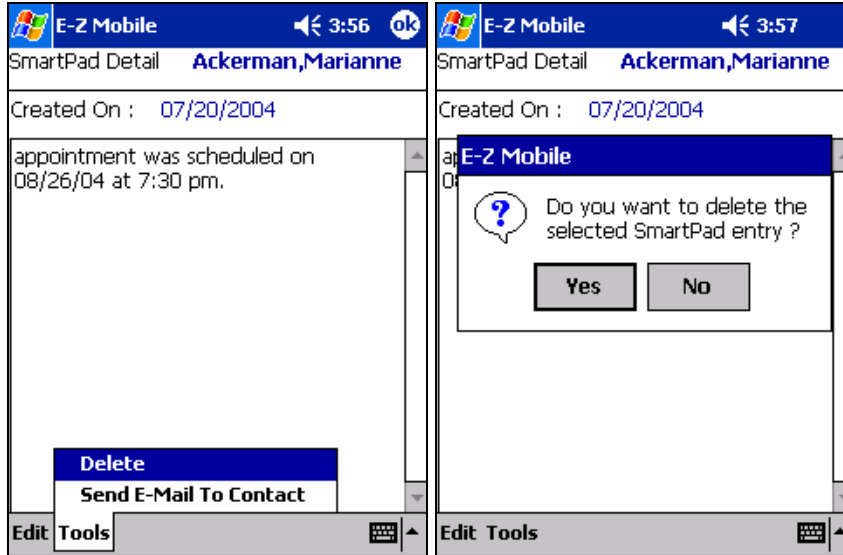
Adding a SmartPad Note

1. From the Contact Details tab, tap the **SmartPad** icon to open the SmartPad Summary.
2. Tap **New** to open the SmartPad Detail tab.
3. Enter the note and then tap **OK** to add the entry to the SmartPad Summary.



Deleting a SmartPad Note

1. From the Contact Details tab, tap the **SmartPad** icon to open the SmartPad Summary.
2. Tap on the entry to be deleted to open the SmartPad Detail tab.
3. Tap **Tools** and then select **Delete** to display the confirmation dialog box.
4. Select **Yes** to delete the entry.

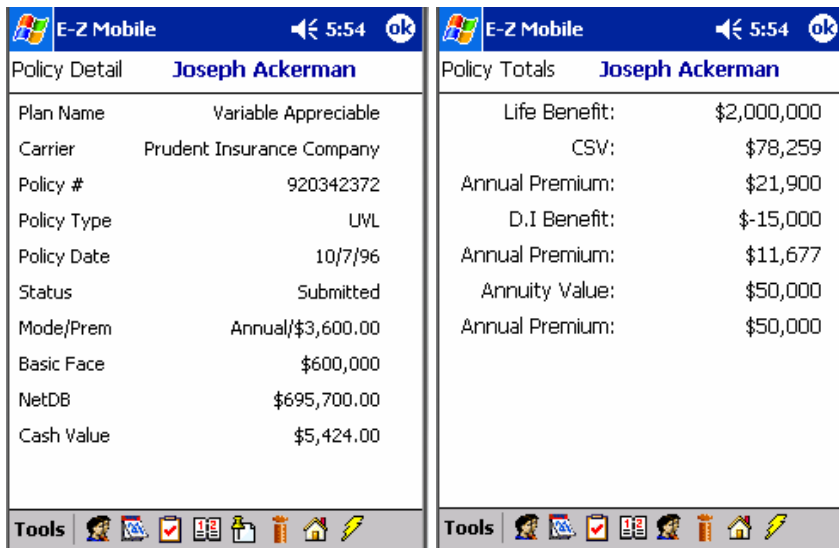


Policies

E-Z Mobile is used to display the Policies, Policy Details, Interested Parties and Policy Totals tabs on the Pocket PC. Note that policy information cannot be added, modified, or deleted from the Pocket PC. 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 then select the **Show Interested Parties** option to display the Interested Parties tab.
4. Tap **OK** twice and then select the **Display Totals** option from the **Tools** menu to display the Policy Totals tab.

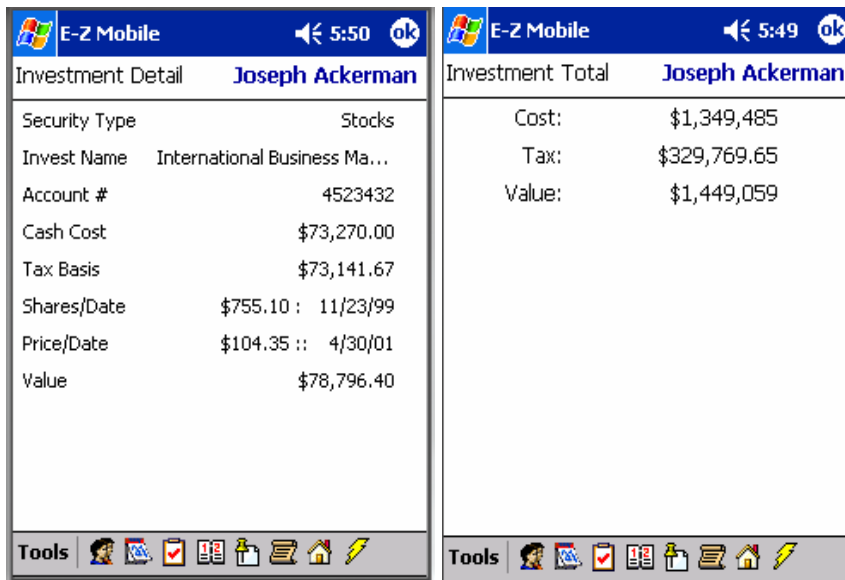


Investments

E-Z Mobile is used to display the Investment Summary, Investment Details and Investment Totals tabs on the Pocket PC. Note that 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

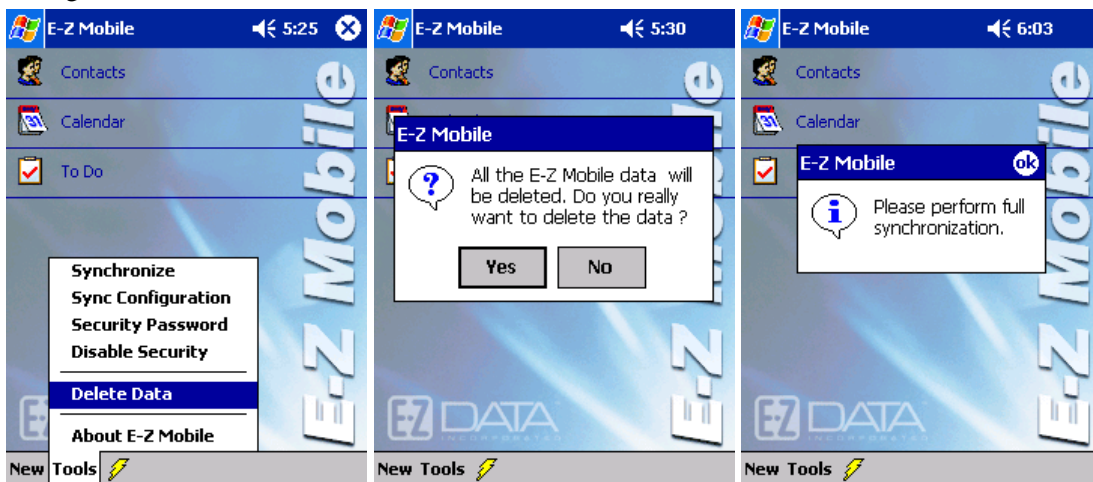
1. From the Contact Details tab, select the **Investment** icon to open the Investment Summary tab.
2. Tap the Investment Name to display the Investment Detail tab.
3. Tap **OK** and then select the **Display Totals** option from the **Tools** menu to display the Investment Total tab.



Delete all the 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. From the E-Z Mobile main screen, tap the **Tools** menu and then select **Delete Data**.
2. Tap **Yes** to delete the E-Z Mobile data. Tap the **OK** button from the E-Z Mobile Information dialog box.



Note: Users should perform a full sync whenever E-Z Mobile data is deleted through the E-Z Mobile **Delete Data** option.

About E-Z Mobile

1. From the E-Z Mobile main screen, tap **Tools** and then select the **About E-Z Mobile** option.
2. The About E-Z Mobile screen displays; tap **OK** to close this screen.

