

Contacts 5

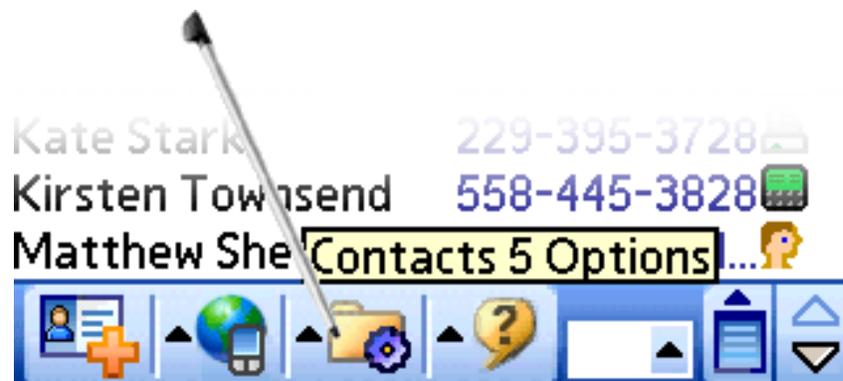
Standard & Photo Editions

Product Documentation



The Contacts 5™ documentation assumes the reader already understands the basic fundamentals of using the built-in Palm OS Address Book and the Palm Operating System. For installation, refer to the Contacts 5 Readme.txt file (included in the download/installation package) to make sure that you install the correct files onto your handheld.

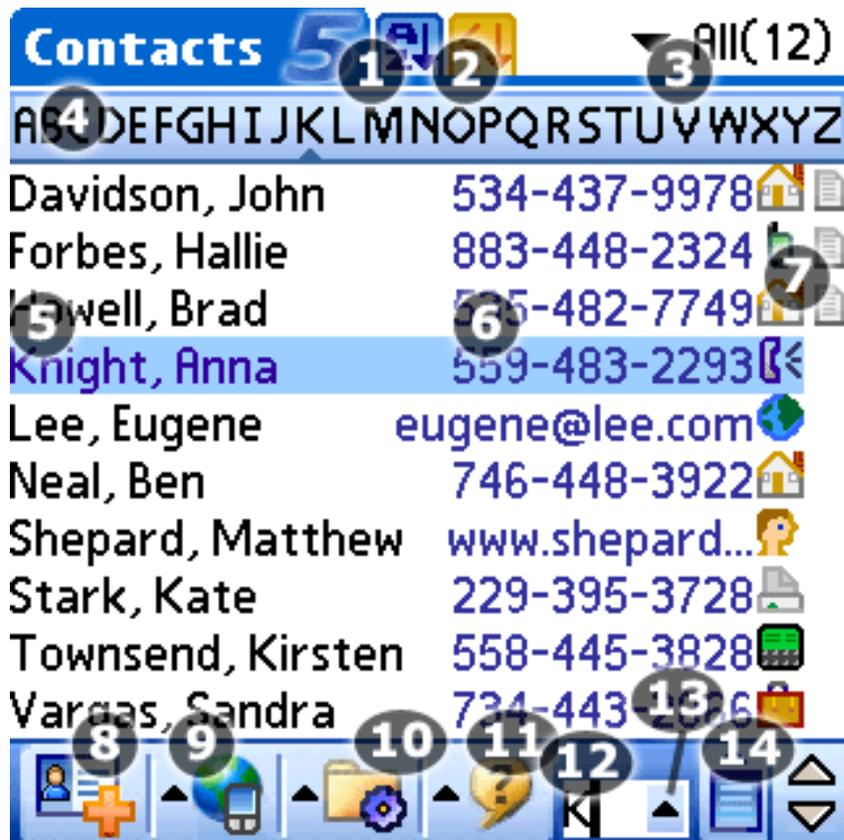
Intelligent Help



When you tap and hold your stylus on any of the tool bar buttons, a small window will be displayed indicating that button's purpose.

List View

- 1) Tap on the A-Z button to sort. This sorting button allows you to select the method in which your names should be displayed. You can choose from the options: Company, Last Name; Company, First Name; First Name, Last Name; Last Name, First Name; Last Name, Company; First Name, Company.
- 2) The field displayed icon allows you to select the field to be displayed (right of the name) on the List View and SmartContacts™ lookup views.



3) The category selector allows you to change the category in which names are displayed and accessed.

4) The letter index allows you to choose a letter for easy access to names. Tap a letter on the letter index, and Contacts 5™ will automatically scroll down to the first matching record.

5) Tap a record to perform the selected action in the Contacts 5™ preferences (refer to the Contacts 5™ Preferences section of this documentation for further information).

6) Tap a record's displayed field to perform an action specified in the Contacts 5™ preferences - such as

dial the contact, popup the related phone # list, etc... (please refer to the Contacts 5™ Preferences section of the documentation for further information).

7) Tap the note icon on the right of the displayed record to view/edit the note for that record.

8) Tap this button to add a new contact.

9) Tap this button to beam/send the current category, business card, family card, or the selected contact.

10) Tap this button to modify the Contacts 5™ preferences.

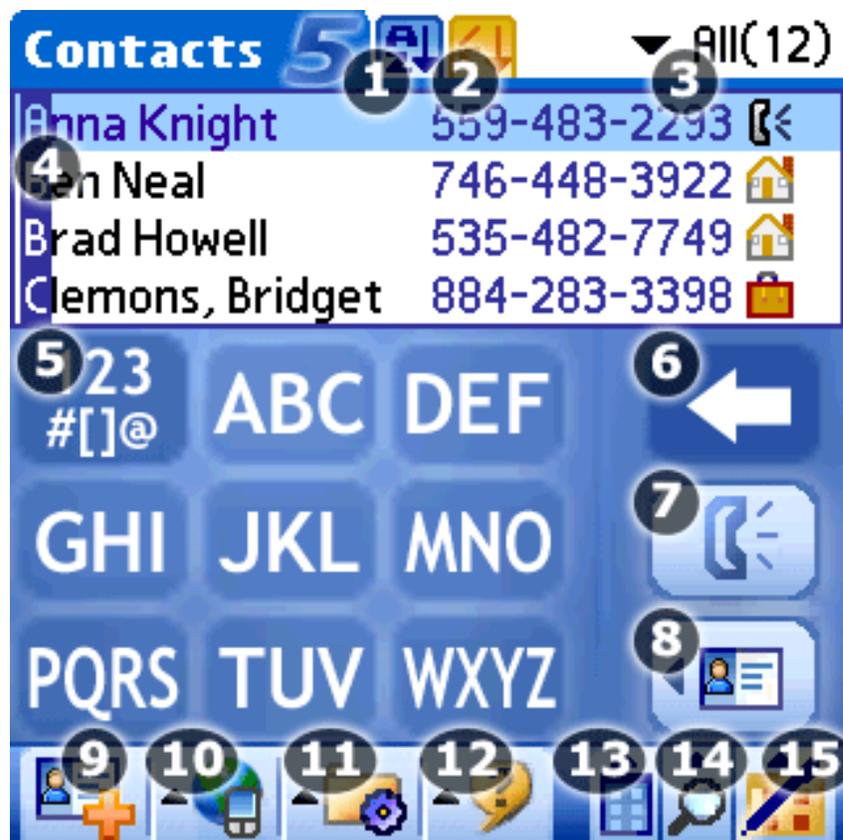
11) Tap the help button to choose from a list of help topics.

12) The search field allows you to quickly locate names with your handheld's input system (Graffiti/keyboard).

13) Tap this button to pop-up the search history list. Tap an item on the list, and Contacts 5™ will scroll to the record that matches that text stored in the history.

14) Tap the view button to switch to the SmartContacts™ lookup view. You can return to the List View by tapping the view button again.

SmartContacts™ Lookup View



1) The (A-Z) sorting button allows you to select the method in which your names should be displayed. You can choose from the options: Company, Last Name; Company, First Name; First Name, Last Name; Last Name, First Name; Last Name, Company; First Name, Company.

2) The field displayed icon allows you to select the field to be displayed (right of the name) on the List View and SmartContacts™ lookup views.

3) The category selector allows you to change the category in which names are displayed and accessed.

4) The record window displays the records matching the search criteria you entered. If only one record is found, its details will be displayed.

5) The letter group buttons allow you to find a name by tapping them. Tip: You can tap the [123] button after the end of the first displayed field (such as a name) to skip to the next field. For example, to find a record "Sam Johnson" you would tap [PQRS],[ABC],[MNO], and then [123] to skip to the next field "Johnson."

6) The back button allows you to undo the last search action performed. Tapping and holding your stylus on the button will clear the search.

7) The dialing button provides easy access to dial the record selected in the record window (refer to item #4 for details).

8) The contact actions button allows you to pop-up the list of contact actions (such as edit, duplicate, delete, etc.) to perform on the record selected in the record window (refer to item #4 for details).

9) Tap this button to add a new contact.

10) Tap this button to beam/send the current category, business card, family card, or the selected contact.

11) Tap this button to modify the Contacts 5™ preferences.

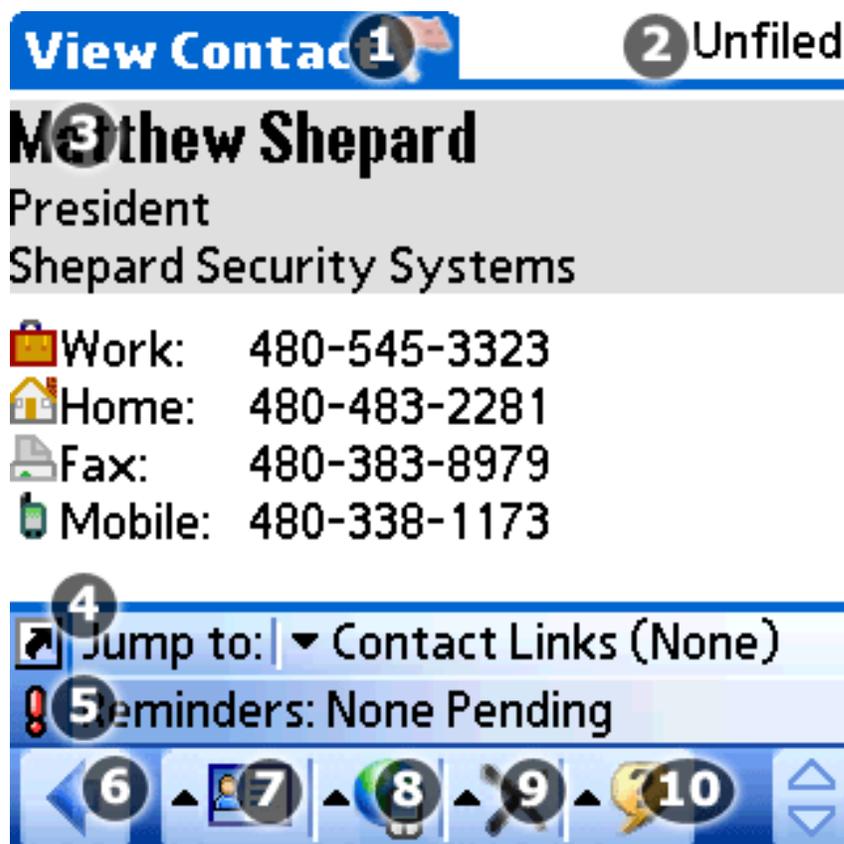
12) Tap the help button to choose from a list of help topics.

13) Tap the view button to switch to the List View. You can return to the SmartContacts™ lookup view by tapping the view button again.

14) Tap this button to choose which fields should be searched. You can choose from the fields: Company Name, Title, Phone Number, Address, City, State, Zip Code, Country, Custom Fields.

15) Tap this button to toggle between the Finger Search (shown in screenshot/enabled by default), and the Graffiti™ Search views. Finger Search provides a searching interface that allows you to search using your finger or stylus. Graffiti™ Search provides an interface that allows you to view more records. Tip: When searching in either of these views, you can perform extremely accurate searches by using a combination of tapping the "finger" buttons (if Finger Search view is used) and entering characters via Graffiti™.

Record View



1) If the displayed record is selected as the Business Card, the red flag icon will be shown in dark red; otherwise, the red flag icon will appear faded.

*Note: If the currently displayed record is selected as the Family Card, the family card

icon [👤] is shown near the business card (flag) indicator.

2) The category indicator displays the category in which the displayed record resides.

3) The name and details for the record are shown in the record window. Tap the record window to

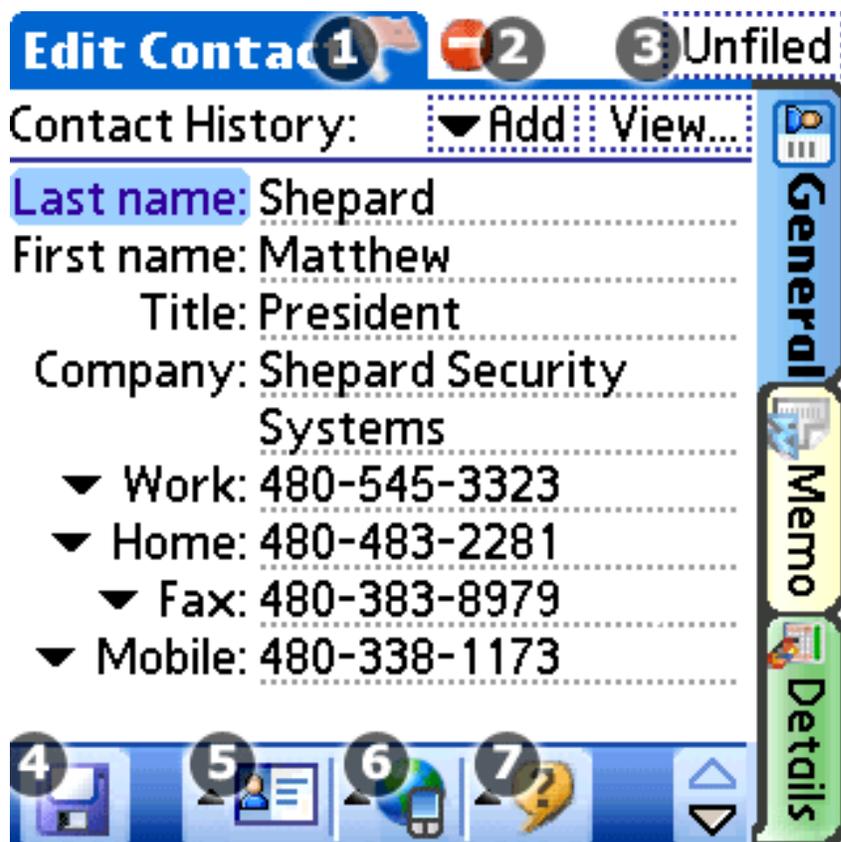
edit the displayed record.

4) Tap the Jump To button to jump to linked contacts. This button is disabled if there are no contacts linked to the current record shown.

5) Tap the Reminders button to pop-up a list of pending reminders. This button is disabled if there are no pending reminders.

- 6) Tap the back button to return to the previous screen (List View or the SmartContacts™ lookup view).
- 7) Tap the contact action button to perform one of following actions: Print Contact, Dial Contact, Select Business Card, Select Family Card, Duplicate Contact, Edit Contact, View Contact Map, Contact History.
- 8) Tap the beam button to beam/send the displayed record, the selected business card, or the selected family card.
- 9) Tap the delete button to delete the displayed record, or delete the displayed record's memo.
- 10) Tap the help button to choose from a list of help topics.

Edit View (General)



1) If the record you are editing is selected as the Business Card, the red flag icon will be shown in dark red; otherwise, the red flag icon will appear faded. *Note: If the currently displayed record is selected as the Family Card, the family card icon [👤👤] is shown near the business card (flag) indicator.

2) The security button allows you to easily toggle the current record's private status. If the record you are editing is marked private,

the security button will be shown in dark red; otherwise, the button will appear faded.

3) The category selector allows you to choose the category in which the record you are editing resides.

4) Tap the floppy disk button to save the record you are editing/adding and return to

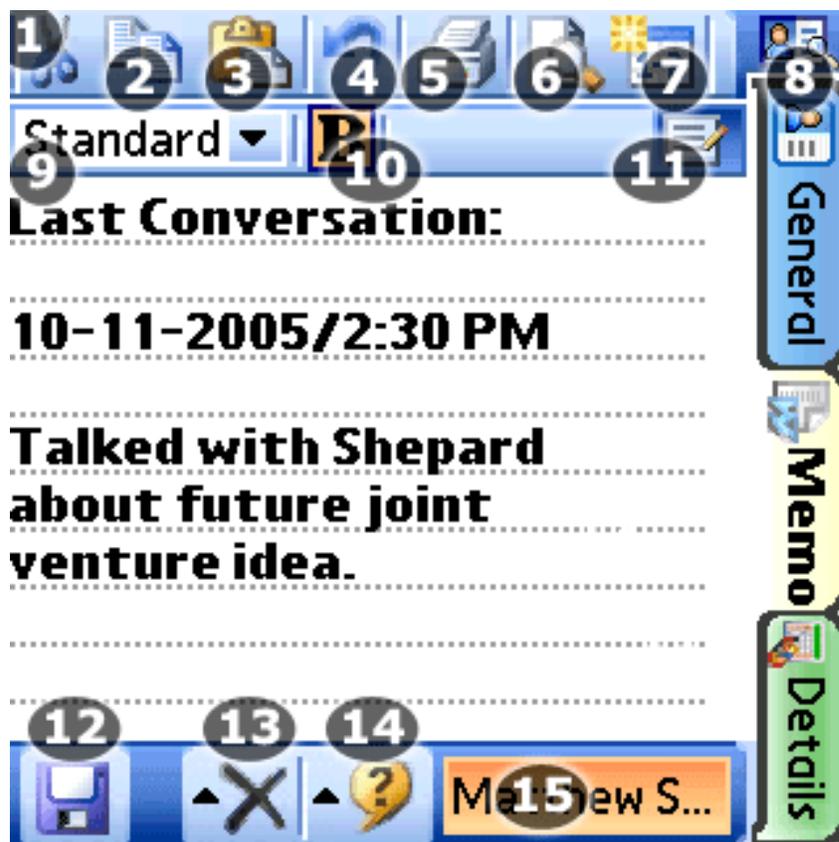
the previous screen (List View or the SmartContacts™ lookup view).

5) Tap the contact action button to perform one of following actions on the record you are editing/adding: Print Contact, Dial Contact, Select Business Card, Select Family Card, Duplicate Contact, Delete Contact, Delete Memo, View Contact Map, Contact History.

6) Tap the beam button to beam/send the record you are currently editing/adding, the selected business card, or the selected family card.

7) Tap the help button to choose from a list of help topics.

Edit View (Memo)



1) Tap the cut button to cut the text currently selected in the memo field.

2) Tap the copy button to copy the text currently selected in the memo field.

3) Tap the paste button to paste the text in the Palm OS clipboard into the memo field.

4) Tap the undo button to undo any modifications to the text in the memo field.

5) Tap the print button to print the details for the record you are currently editing.

6) Tap the information button to view statistics about the memo that you are writing/editing.

7) Tap this button to insert a Date/Time stamp in the memo that you are currently writing/editing. Tip: To select the location of where the date/time stamp should be inserted, move the cursor (by tapping in the edit field) to the desired location and then tap button #7 (as shown in the screenshot above).

8) Tap the lookup button to lookup another name in the Address Book database and add the name's information to the memo you are editing.

9 & 10) Tap the font selector to select the font to be used in the memo edit field. Tap the B button to toggle the bold setting for the selected font.

11) Tap this button to toggle the read/write status for reading/writing memos. Note: When the read status is used, the memo field cannot be edited.

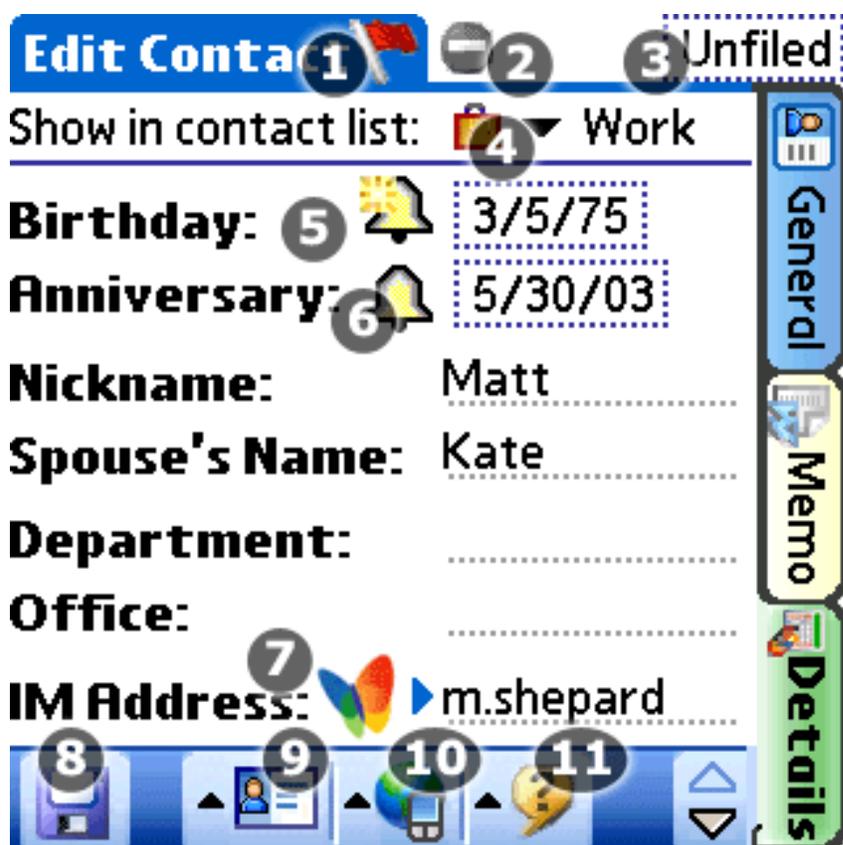
12) Tap the floppy disk button to save the record you are editing/adding and return to the previous screen (List View or the SmartContacts™ lookup view).

13) Tap the delete button to delete the memo attached to the record (or the record itself) which you are editing/adding and return to the previous screen (List View or the SmartContacts™ lookup view).

14) Tap the help button to choose from a list of help topics.

15) The name display informs you of the record you are currently editing. Tip: Sometimes the name cannot be completely shown on the name display, so the name will be truncated. Tap and hold the stylus over this button to view the entire name.

Edit View (Details)



1) If the record you are editing is selected as the Business Card, the red flag icon will be shown in dark red; otherwise, the red flag icon will appear faded.

*Note: If the currently displayed record is selected as the Family Card, the family card icon [👨👩] is shown near the business card (flag) indicator.

2) The security button allows you to easily toggle the current record's private status. If the record you are editing is marked private, the security button will be shown in dark red; otherwise, the button will appear faded.

3) The category selector allows you

to choose the category in which the record you are editing resides.

4) Use the Show in Contact List feature to choose the field to display on the List View and SmartContacts™ lookup view. Tip: In order for the selected field to be displayed, make sure the field displayed setting is set to Number (refer to List View/SmartContacts lookup view button #2 in this documentation for details).

5) Tap the reminder button to set a yearly reminder for this contact's birthday (note that the birthdate field must be set to the contact's date of birth).

 Matthew Shepard 480-545-3323  

Tip: On the List View/SmartContacts lookup view, the record will be shown with a red ! icon when Contacts 5 is alerting you about that contact's birthday. Tap this button to pop-up a list of pending reminders (where details about the reminder will be shown).

6) Tap the reminder button to set a yearly reminder for this contact's anniversary (note that the anniversary field must be set to the contact's date of marriage).

 Matthew Shepard 480-545-3323  

Tip: On the List View/SmartContacts lookup view, the record will be shown with a red ! icon when Contacts 5 is alerting you about that contact's anniversary. Tap this button to pop-up a list of pending reminders (where details about the reminder will be shown).

7) Tap this button to change the icon that displays the contact's instant messenger software. You can select from MSN Messenger, AOL Instant Messenger (known as AIM), Yahoo Messenger, and ICQ.

8) Tap the floppy disk button to save the record you are editing/adding and return to the previous screen (List View or the SmartContacts™ lookup view).

9) Tap the contact action button to perform one of following actions on the record you are editing/adding: Print Contact, Dial Contact, Select Business Card, Select Family Card, Duplicate Contact, Delete Contact, Delete Memo, View Contact Map, Contact History.

10) Tap the beam button to beam/send the record you are currently editing/adding, the selected business card, or the selected family card.

11) Tap the help button to choose from a list of help topics.

Contacts 5 Preferences (General)

Contacts 5 Prefs **1** ▼ General

Sorting

- Sort on Startup **2**
- Sort for Each Category **3**

Categories/Records

- Remember Last Category **4**
- Remember Last Record Selected **5**

Localization

- Display Records in Int'l Format **6**

OK

the checkbox to enable/disable this feature.

6) The Display Records in Int'l Format setting automatically displays your names in international format and configures Contacts 5 to show the correct field names for your location. (Note: It is also recommended that you modify the Palm OS preferences for your location for best performance/configuration in Contacts 5.)

1) Tap the category selector to change the category of preferences to edit.

2) If you use other Address Book applications with Contacts 5, you may want to select the option Sort on Startup to ensure your records are displayed and sorted properly.

3) The Sort for Each Category option allows you to assign a sort method for each category.

4) Contacts 5 can remember the last category selected on the List View and SmartContacts™ lookup view. Tap the checkbox to enable/disable this feature.

5) Contacts 5 can remember the last record selected on the List View. Tap

Contacts 5 Preferences (Keys)

Contacts 5 Prefs **1** ▼ **Keys**

When the Address key is pressed in,
Contacts 5 should toggle between...

2 **Category** | List View/SmartContacts

2
Scrolling

Jog Dial Scrolls By: **3** **Selection** | Page

OK

1) Tap the category selector to change the category of preferences to edit.

2) You can quickly toggle between the List View and SmartContacts™ lookup view by pressing the Address Book button on your PDA (while in Contacts 5). To toggle between the List View and SmartContacts™ lookup view, choose the List View/SmartContacts option. Or, if you would prefer to have Contacts 5 toggle between the displayed category, choose Category.

3) On a Sony CLIE handheld this option will scroll the List View/SmartContacts lookup view by selection (one line at a time) or by page.

Contacts 5 Preferences (Actions)

Contacts 5 Prefs 1 ▼ **Actions**

Stylus Actions

When a record is tapped on List View:

2 **Do Action...** Use Action List

3 **View Contact**

4 **And use Action List via Tap & Hold**

Tapping on field displayed (List View screen) should:

5 ▼ **Pop-up Phone List**

OK

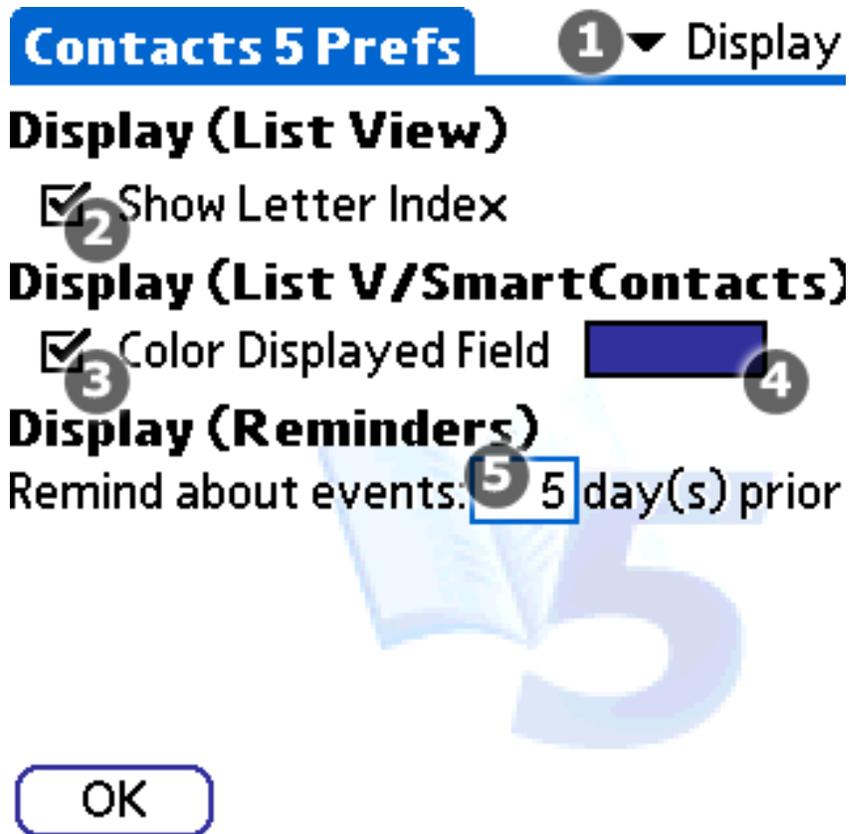
1) Tap the category selector to change the category of preferences to edit.

2) To quickly view/edit names, you can choose the action to be performed when you tap on a name displayed on the List View/ SmartContacts™ lookup view. Choose Do Action... to perform a particular action (then select the action below) or choose Use Action List to choose an option from a list when you tap on a name.

3) If you chose the Do Action option and you would like the Action List to be displayed by tapping and holding the stylus (for several seconds) on a displayed name, select And use Action List via Tap & Hold.

4) You can choose an action to be performed when a field (such as the displayed phone #) on the right of a displayed name is tapped. Tap the selection trigger to choose from an action. If you do not want an action performed, select Do Nothing.

Contacts 5 Preferences (Displays)



1) Tap the category selector to change the category of preferences to edit.

2) The letter index (available only in the List View) allows you to find a name faster by tapping a letter to scroll up/down to the first matching record.

3 & 4) The Color Displayed Field option, if enabled, allows you to change the color of the field displayed on the List View/ SmartContacts lookup view.

5) This field allows you to specify a number of days before you will be notified of upcoming events (such as birthdays and anniversaries).

Contacts 5 Preferences (High Resolution)

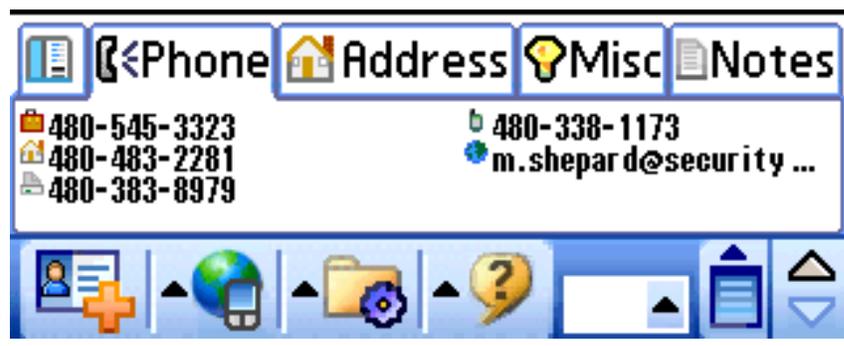


1) Tap the category selector to change the category of preferences to edit.

2) Tap the Enable Contact Preview Pane checkbox to enable/disable the Preview Pane shown on the List View. If the Enable Contact Preview Pane option is enabled, you can choose the font to be used when displaying record information on the Preview Pane.

3) Tap the Use Tiny Fonts (List View) checkbox to enable/disable the display of records using tiny fonts on the List View. If the Use Tiny Fonts (List View) option is enabled, you can choose the font to be used when displaying records on the List View.

High Resolution Features



The Preview Pane (shown on the List View if enabled in the Contacts 5™ preferences) allows you to view the selected record's information without having to go to the Record View screen. The Preview Pane is automatically updated whenever you move the record selection using the Sony CLIE Jog Dial, the Palm Tungsten/Zire 71 NavPad, and the Tapwave Zodiac joystick.

Colors and Styles

Colors and Styles

Skin: ▼ **1** ContactsClassic V5

Color Scheme: ▼ **2** ContactsClassic V5

ContactsClassic V5 (Default)

Default Contacts 5 colors and icons

By PDA Performance, Inc.

<http://www.pdapformance.com>

(c) 2002-2003 PDA Performance, Inc.

OK

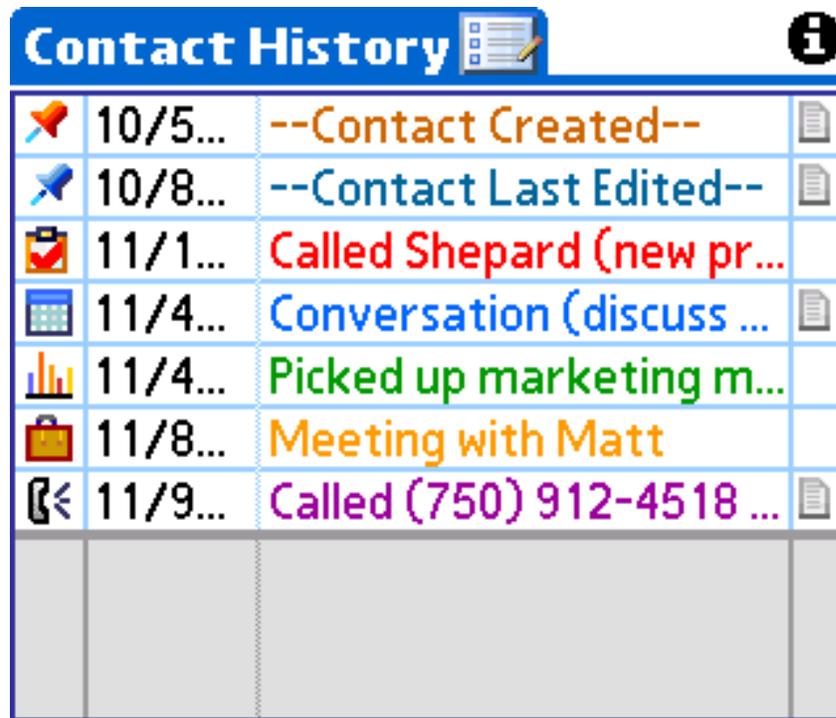
1) Tap the Skin selector to select the skin that Contacts 5™ should use. New in Contacts 5: You can install up to 100 skins at a single time in RAM, on a memory card, or both. Memory card support is available only on handhelds running Palm OS 4.0 (or higher).

Important: Skins installed on a memory card must be installed in the /Palm/Launcher directory of your memory card or Contacts 5 will not find them!

2) Tap the Color Scheme selector to select the user interface color scheme. After making a selection, the color scheme is applied to the Colors and Styles form so you can preview the color scheme.

Visit <http://www.pdapformance.com/contacts5skins> to download free skins for Contacts 5. Information on creating your own skins is also available at the Contacts 5 skins database.

Contact History



Contact History		
10/5...	--Contact Created--	
10/8...	--Contact Last Edited--	
11/1...	Called Shepard (new pr...	
11/4...	Conversation (discuss ...	
11/4...	Picked up marketing m...	
11/8...	Meeting with Matt	
11/9...	Called (750) 912-4518 ...	

▼ Add Remove Done

Keeping a contact history allows you to keep track of previous events, meetings, conversations, etc. There are two default items that Contacts 5 automatically manages for you if you created/edited the contact in Contacts 5.

- Contact Created History Item - Contacts 5 records the date and time when the contact was created. If this item does not appear in existing contacts, you can create your own.
- Contact Last Edited History Item - Contacts 5 automatically records the date and time when the contact was last edited. You can assign a date and time, icons, colors, and store memos for each of your contact history items.

Tip: In the center of the screen there is a "slider" (line dividing the date/time and description of the contact history items) that you can slide back and forth by tapping and holding the stylus on this line.

Contact Linking



Contact Linking is a powerful feature that allows you to link contacts together. You can access this feature by scrolling down on the Edit Contact (Details Tab) screen.

Why would I use this feature?

Linking contacts allows you to easily access related contacts when viewing/editing

contacts. For example, you could have a contact for your employer/company. All the employee contacts for that company could be linked to the employer/company contact. When viewing the employer/company contact, you can easily "Jump To" these linked records.

How does it work?

To create new links, tap the new link button [] on the Edit Contact (Details) screen. The Edit Contact (Details) screen must be scrolled down to view the contact links menu bar. To complete the process of adding a new link, follow on-screen instructions.

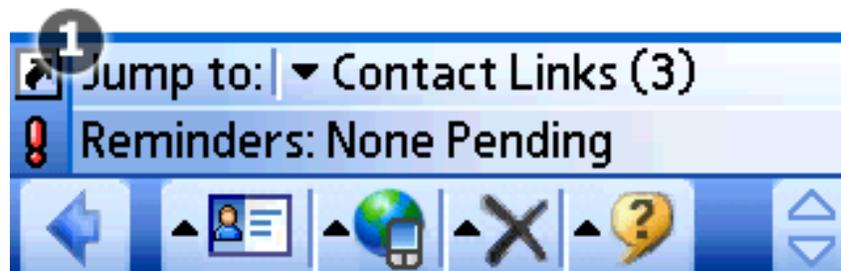
To remove links, tap the delete link button [] on the Edit Contact (Details) screen. The Edit Contact (Details) screen must be scrolled down to view the contact links menu bar. To complete the process of removing a link, follow on-screen instructions.

To Jump To a link, you can:

- 1) Tap the Contact Links trigger on the Edit Contact (Details) screen. The Edit Contact (Details) screen must be scrolled down to view the contact links menu bar.



- 1) Tap the Jump To button on the bottom of the View Contact screen.



Extra Fields



Contacts 5 allows you to store up to 30 "extra fields" in addition to the 4 custom fields. The "extra fields" are much more flexible for storing data because instead of having a plain text field, you can make the "extra fields" type-specific. For example, you could create a "date" type field. When you edit this field, a calendar would be shown where you could select the date. Another field could be created that would specifically store true/false values.

Note: "Extra fields" are global, meaning that they are accessible to all records in the Contacts 5.

How does it work?

To create new fields, tap the New Field... button. The Edit Contact (Details) screen must be scrolled down to view the "extra fields" list. To complete the process of creating a new field, follow on-screen instructions.

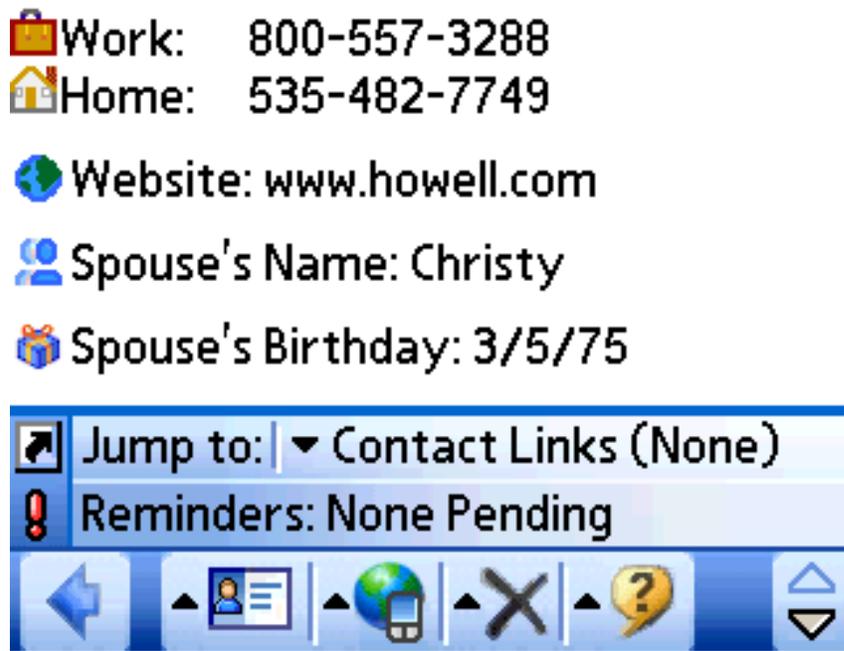
To remove fields, tap the Remove Field button. The Edit Contact (Details) screen must be scrolled down to view the "extra fields" list. To complete the process of removing a field, follow on-screen instructions.

Warning: As mentioned above, "extra fields" are global. Deleting an extra field will remove the field as well as data stored in that field for ALL of your contacts!

Tip: In the center of the screen there is a "slider" (line dividing the field names/field values) that you can slide back and forth by tapping and holding the stylus on this line.



"Extra field" data is displayed on the View Contact screen.



Contacts 5 Photo Edition - Assigning contact photos



Select the Edit Contact option while viewing the contact to which you want to assign a photo. At the Edit Contact screen, tap on the Photo Options button (1).

From the pop-up list, select Attach Photo. Next, use the Photo Picker and navigate to the contact photo you wish to assign.

Once the photo you wish to assign is listed, simply tap on it.

Assigned contact photos are visible from the List View Preview Pane and the View Contact screen. Note: Contact photo support requires Contacts 5 Photo Edition; this functionality is not available in Standard Edition. Contacts 5 Standard Edition users can find out more information on Photo Edition at the PDA Performance web site (<http://www.pdapformance.com>).

Contacts 5 Tips

You can increase productivity when you are able to find names and information faster. The tips below recommend settings and also explain features you should use to get the most out of Contacts 5™.

- On the List View screen, you can view a brief history of records that you have most recently searched. On the right of the search field, tap the arrow to view the search history.
- Use the "A-Z" function on the List View/SmartContacts™ views. Tap it to select the method you wish names to be sorted and listed. For example, if a name does not have data entered in the last and first name fields and you wish to find it by the name of the company the contact works for, you should use the "Company, Last Name" option.
- In the preferences (see "Preferences" help topic for further information) you can customize the action performed when you tap on a name (on the List View screen). If you generally perform a variety of tasks, you may want to use the Action List. If you only need to view or edit a name when it is tapped on, you may want to use the "Do Action..." setting.
- If you have the Action List enabled (see "Preferences" help topic for further information) you can tap "RapidEdit™" to quickly edit a name's details, such as the category and whether the name should be marked private (see "Security" help topic for further information).
- On the List View screen, you can tap the phone number (displayed on the right of the contact listing) to pop-up the built-in dialer or a phone # list (see "Preferences" help topic for further information). On the phone # pop-up list, you can quickly select the phone number/field to be displayed on the List View/SmartContacts views.
- The print function allows you to print contact information, contact information and memo, or just the memo. (The print function requires PalmPrint which can be downloaded at <http://www.stevenscreek.com/>)
- You can easily view contact maps since Contacts 5™ includes Mapopolis support. On any of the "contact options" lists, tap "View Contact Map."
- Make Contacts 5™ your own. By using the Colors and Styles dialog, you can select a Color Scheme to change the colors or install skins to customize the look of Contacts 5™. Add-on skins can be downloaded at <http://www.pdapformance.com/contacts5skins>.
- Create your own custom fields. Tap (Menu->Options->Rename Custom Fields) and you can create extra fields with your own titles. You can use these extra fields when you edit or create records.
- Create even more customizable fields. At the Edit Contact (Details) screen, scroll down, and you have access to type-specific fields. You can even set yearly reminders for these

fields. For example, you could create a field that contains the birthday of that contact's spouse. Set a reminder for that field, and Contacts 5 will remind you every year when it's his or her birthday.

- Linking contacts allows you to easily access related contacts when viewing/editing contacts. For example, you could have a contact for your employer/company. All the employee contacts for that company could be linked to the employer/company contact. When viewing the employer/company contact, you can easily "Jump To" these linked records.

Visit <http://www.pdapformance.com> for more information on using Contacts 5.

About

This documentation has been written and produced entirely by PDA Performance, Inc. SmartContacts™, SmartContacts Version 5™, and RapidEdit™ are trademarks of PDA Performance, Inc. PalmPrint and Mapopolis are products of Stevens Creek Software and Mapopolis, respectively. All names, numbers, and other information use in these examples are fictional. They are for demonstration purposes only. Pursuant with copyright laws, this manual may not be copied, in whole or in part, without the written consent of PDA Performance.

© 2005 PDA Performance, Inc. All rights reserved.