ACTIVANT

Eclipse Palm Sales Force Automation

Release 8.6.2 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.2 Online Help System

Publication Date: December 5, 2007

Table Of Contents

Palm SFA Overview 1
Palm SFA Setup Overview 2
Setting Up Options for Use 2
Setting Up HotSync Options for Palm Devices 4
Performing a HotSync with a Palm Device 7
Creating a Custom Category on the Palm Device 8
Setting Up Palm SFA on the Host 12
Control Maintenance Records for Palm SFA 13
Palm SFA Control Maintenance Records 13
Pocket Order Entry Control Maintenance Records 13
Configuring User File Maintenance for Palm SFA 15
Authorization Keys 15
Defining Scheduler Parameters for Palm SFA Users 17
Defining Job Queue Parameters for Palm SFA Users 19
Defining Product Download Parameters for Palm SFA Users 22
Setting Up Message Groups for Palm SFA 24
Mass Loading User IDs to the Contact and Customer Access Lists 25
Setting Up Palm SFA on the Palm Device 27
Setting Palm SFA HotSync Preferences 28
Starting Palm SFA Applications 30
Using the Palm Device Find Application 32
Using the Find Field in Palm SFA 34
Using the Default Editing Menu in Palm SFA 35
How Palm SFA Messages the Palm Administrator 36
Pocket Contacts Overview 37
Accessing Pocket Contacts Information 38
Managing Contacts Linked to Accounts in Pocket Contacts 39
Pocket Contacts Setup Overview 41
Setting Palm SFA HotSync Preferences 42
Setting Pocket Contacts Preferences 44
Purging All Pocket Contacts Records 45

Finding Pocket Contacts Version Number 46
Viewing the Pocket Contacts Address List 47
Sorting Names in the Contacts Address List 48
Viewing Pocket Contacts Records 49
Using the Customer / Vendor Accounts Address View 49
Using the Contacts Address View 49
Creating Account or Contact Records in Pocket Contacts 50
Deleting Pocket Contacts Records 53
Viewing Notes for Pocket Contacts Accounts 54
Pocket Scheduler Overview 56
Accessing Pocket Scheduler Information 57
Pocket Scheduler Setup Overview 58
Setting Palm SFA HotSync Preferences 59
Setting Pocket Scheduler Preferences 61
Setting Pocket Scheduler Display Options 62
Purging All Scheduled Events for Pocket Scheduler 64
Finding Pocket Scheduler Version Number 65
Using the Pocket Scheduler Daily View 66
About the Daily Schedule View 66
Setting Options in Pocket Scheduler 67
Creating Events in Pocket Scheduler 69
Deleting Events in Pocket Scheduler 71
Editing Event Details in Pocket Scheduler 72
Making Events Repeat in Pocket Scheduler 74
Considerations When Using the Repeat Function 75
Pocket Scheduler Weekly View 76
Pocket Scheduler Monthly View 78
Using Phone Lookup in Pocket Scheduler 80
Adding Additional Information to Events in Pocket Scheduler 82
Reviewing Details of View Only Events in Pocket Scheduler 83
Pocket Job Queue Overview 85
Accessing Pocket Job Queue Information 86
Pocket Job Queue Setup Overview 87

Setting Palm SFA HotSync Preferences 88
Setting Pocket Job Queue Preferences 90
Finding Pocket Job Queue Version Number 92
Viewing Your Job Queue in Pocket Job Queue 93
Purging All Trackers from Pocket Job Queue 95
Creating Trackers in Pocket Job Queue 96
Appending to Trackers in Pocket Job Queue 98
Viewing Tracker Comments in Pocket Job Queue 99
Forwarding Trackers with Pocket Job Queue 100
Reviewing Tracker Header Information in Pocket Job Queue 102
Closing Trackers in Pocket Job Queue 104
Pocket Order Entry Overview 106
Accessing Pocket Order Entry 107
Uploading Orders to the Host with Pocket Order Entry 108
  Removing Orders Uploaded from Pocket Order Entry 108
  Changing the Sent Status of Orders Created in Pocket Order Entry 109
Pocket Order Entry Setup Overview 110
Setting Palm SFA HotSync Preferences 111
Setting Pocket Order Entry Preferences 113
Downloading the Product File to the Palm Device 115
Setting Product File HotSync Preferences 117
Rebuilding the Product File Index on the Palm Device 120
Finding Pocket Order Entry Version Number 122
Adding Customers to the Pocket Order Entry Customer List 123
Editing Customer Records in the Pocket OE Customer List 126
Creating Orders with Pocket Order Entry 128
Moving Orders in Pocket Order Entry 131
Selecting Pocket Order Entry Views 133
Editing Orders with Pocket Order Entry 134
Selecting Products and Quantities Using Reorder Pad in Pocket Order Entry 137
Entering Items and Quantities in Pocket Order Entry 140
Searching for Products in Pocket Order Entry 143
  Product Information 144

Reviewing Line Item Details in Pocket Order Entry 146
Adding Line Item Comments in Pocket Order Entry 150
Creating Nonstock Items in Pocket Order Entry 152
Index 155

Palm SFA Overview

Palm Sales Force Automation (SFA) is a companion product comprised of three applications for your Palm device. Each application enables you to download, edit, and synchronize data between your Palm device and the host system running the Eclipse application:

- **Pocket Contacts –** Create new or edit contact, customer, and vendor records.
- **Pocket Scheduler –** Create new or edit existing scheduled events.
- **Pocket Job Queue –** Create new or edit existing trackers.
- **Pocket Order Entry –** Create sales orders.

Before using these applications, set up the Palm device and the host system to synchronize data.

> **Note:** Palm SFA supports Palm O.S. 5.2.1 or below. Unsupported operating systems can cause loss of functionality.

See Also:

Palm SFA Setup Overview

Control Maintenance Records for Palm SFA

Setting Up Palm SFA on the Palm Device

Palm SFA Setup Overview

Before you can use the Palm SFA application, you must set up your host system, primary workstation, and Palm device.

Designate a computer to function as a bridge between the host system and the Palm device. On the selected computer, do the following in the order listed:

- Connect the Palm device synchronization cradle/cable.
- Install the Palm Desktop application.
- Select **HotSync Manager** setup options.

  Note: Refer to the documentation that accompanied your Palm devices for instructions on connecting the synchronization cradle/cable, installing the Palm Desktop application, and selecting HotSync Manager setup options.

Setting Up Options for Use

You need to set up the HotSync options and modify the application for the best use based on your business needs. To set up the different options, use the following instructions:

1. Set up HotSync options to connect the Palm device to the host system directly or remotely.

   Note: The process of synchronizing data on the Palm device with data on the host system is known as a "HotSync."

2. Modify the Eclipse application on the host system to work with Palm SFA.

   Modifications can include the following:

   - Setting up control maintenance records
   - Configuring User Maintenance
   - Setting up message groups
   - Adding User IDs to the access lists of contacts and customer records
   - Setting Remote Order Entry parameters:
     - Default User Messaged with Order Changes
     - Remote Order Queue users
   - Assigning Employees to Monitor Remote Orders
   - Scheduling the Customer Product by Demand Index Build

3. Set up the applications on the Palm device.

   For more information, see any of the following topics:

   - Pocket Contacts Setup Overview

- Pocket Scheduler Setup Overview
- Pocket Job Queue Setup Overview
- Pocket Order Entry Setup Overview

See Also:

Palm SFA Overview

Setting Up Palm SFA on the Host

Setting Up Palm SFA on the Palm Device

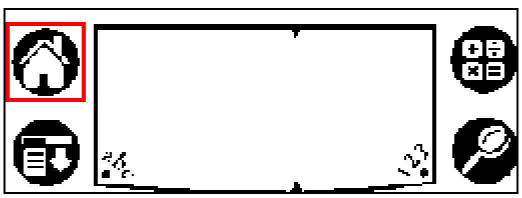
Setting Up HotSync Options for Palm Devices

The process of synchronizing data on the Palm device with data on the host system is known as a "HotSync." Before synchronizing data, you must configure your Palm device to communicate with the host system, either:

- Directly using a HotSync cradle or cable connected directly to a primary computer that communicates with the host system.
- Remotely using a modem, network, or wireless connection.

To set the network HotSync options:

1. Press the **Power** button to activate the Palm device.
2. Tap the **Applications** screen button on the Palm device screen to display the main Applications screen.



3. Tap the drop-down (▾) in the upper right corner of the screen and select **All**.
4. Locate and tap the HotSync icon.

   The HotSync application displays.
5. Tap the **Menu** screen button and select **Modem Sync Prefs** from the **Options** menu.
6. Tap **Network** and then **OK** to return to the HotSync screen.
7. Tap **Modem** and then **Select Service** to display the Network Preferences screen.
8. Tap the **Phone** field to display the Phone Setup screen.
9. In the **Phone #** field, enter 00 and tap OK to return to the Network Preferences screen.
10. Tap **Done** to save settings and return to the HotSync screen.
11. Continue by setting the local area network (LAN) HotSync options.

To set the local area network (LAN) HotSync options:

1. From the HotSync screen, tap the **Menu** screen button and select **LANSync Prefs** from the **Options** menu.
2. Tap **LANSync** and then **OK** to return to the HotSync screen.
3. Continue by setting the primary PC HotSync options.

To set the primary PC HotSync options:

1. From the HotSync screen, tap the **Menu** screen button and select **Primary PC Setup** from the **Options** menu.
2. Complete the following fields on the Primary PC Setup screen and then tap **OK** to return to the HotSync screen.

Field	Description
Primary PC Name	Enter the name of the computer to which the Palm device connects. • To locate this information for your computer: 1. Right-click the HotSync icon in the Windows system tray. 2. Click **Setup** to display the Setup dialog box. 3. Click the **Network** tab. 4. Click **TCP/IP Settings**.
Primary PC Address	Enter the Internet Protocol (IP) address for the computer. • To locate this information for your computer: 1. Right-click the HotSync icon in the Windows system tray. 2. Click **Setup** to display the Setup dialog box. 3. Click the **Network** tab. 4. Click **TCP/IP Settings**.
Subnet Mask (optional)	Only enter a Subnet Mask address if you are instructed to do so by Eclipse Advance Technical Support.

3. Continue by performing an initial HotSync to associate a user with the Palm device.

To perform an initial synchronization/HotSync:

1. Place the Palm device in its cradle or connect it to its synchronization cable.

   Note: See the instructions that came with your Palm device for information on installing the cradle or HotSync cable.

2. Make certain that the HotSync Manager is running.

   By default, HotSync Manager starts automatically when you start your computer, and appears as an icon in your Windows system tray.

3. Press the **HotSync** button on the cradle or cable, or tap the HotSync icon on the Palm device.

   The system displays the Users dialog box.

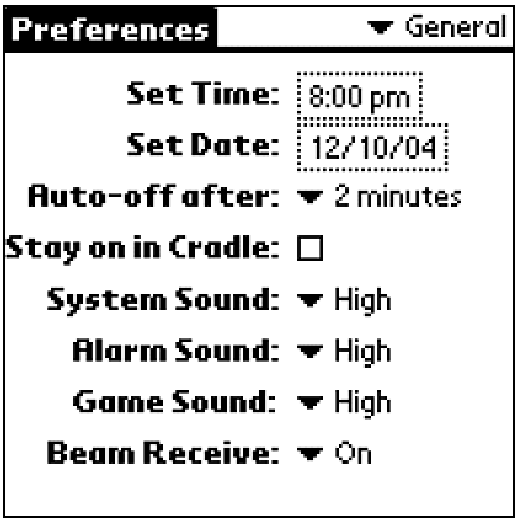
4. Click to select a user to associate with the Palm device.

   The Palm device synchronizes with the Primary PC and displays a HotSync Progress dialog box. Click **Cancel** if you need to stop the HotSync. It can take several seconds for the HotSync process to stop.

   If the system detects a problem during the HotSync, it displays a HotSync Log dialog box.

5. Tap **Reset** when the Palm device prompts.

6. The Palm device displays the General Preferences screen.



The initial HotSync is now complete.

See Also:

Performing a HotSync with a Palm Device

Palm SFA Setup Overview

Starting Palm SFA Applications

Performing a HotSync with a Palm Device

The process of synchronizing data on the Palm device with data on the host system is known as a "HotSync."

Before synchronizing data, you must configure your Palm device to communicate with the host system.

To perform a HotSync with a Palm Device:

1. Place the Palm device in its cradle or connect it to its synchronization cable.

   Note: See the instructions that came with your Palm device for information on installing the cradle or HotSync cable.

2. Make certain that the HotSync Manager is running.

   By default, HotSync Manager starts automatically when you start your computer, and appears as an icon in your Windows system tray.

3. Press the HotSync button on the cradle or cable, or tap the HotSync icon on the Palm device.

   A HotSync Progress dialog box displays on your computer. Click **Cancel** to stop the HotSync.

   Note: It can take several seconds for the HotSync process to stop.

4. Remove the Palm device from the cradle or cable when the process is complete.

See Also:

Palm SFA Overview

Palm SFA Setup Overview

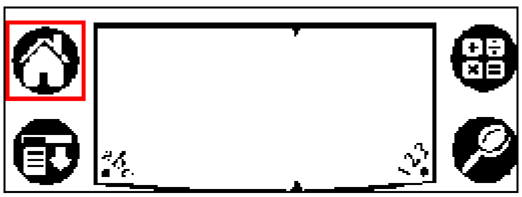
Starting Palm SFA Applications

Creating a Custom Category on the Palm Device

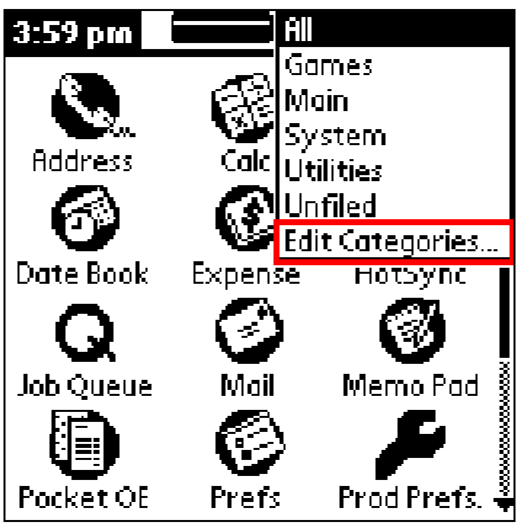
You can create a custom category on the Palm device to hold all of the Palm SFA icons. By creating custom categories, you can organize your Eclipse application Palm SFA icons to make them easier to find. After creating the category, you can move the Palm SFA icons to the new category. Now you can easily locate the Eclipse applications installed on your Palm device.

To create a custom category:

1. Tap the **Applications** screen button on the Palm device screen to display the main Applications screen.



2. Tap the drop-down (▾) in the upper right corner of the screen and select **Edit Categories...** from the list.



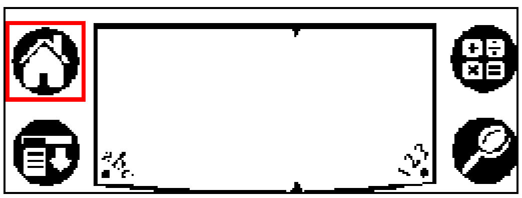
3. On the Edit Categories screen, tap **New.**
4. At the prompt, enter a new category name and tap **OK**.

   For example, enter **Eclipse**.

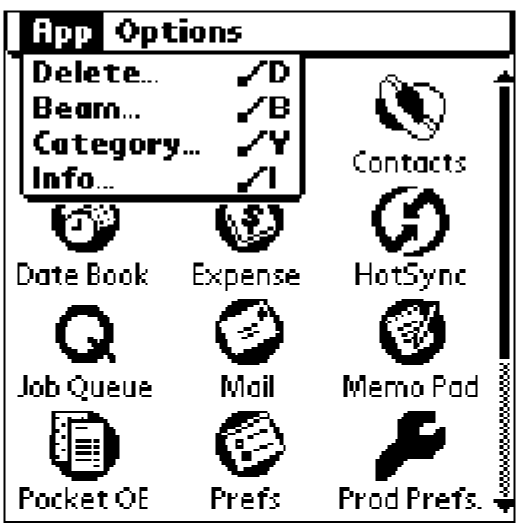
5. Tap **OK** to exit the Edit Categories... screen and return to the main Applications screen.

To move icons to a new category:

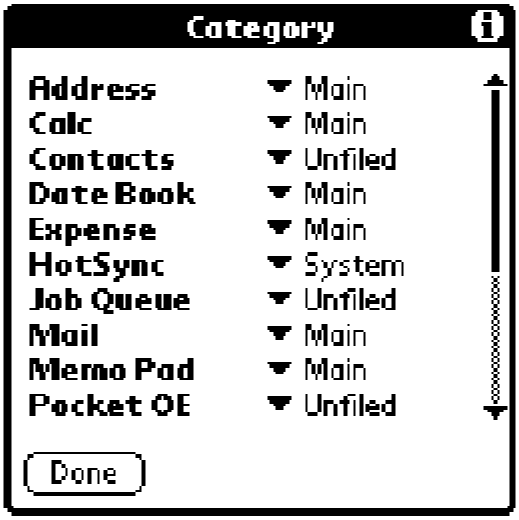
1. Tap the **Applications** screen button on the Palm device screen to display the main Applications screen.



2. Tap the **Menu** screen button to display the Application screen menu bar.



3. Tap **App** and then **Category...** to display the Category screen.

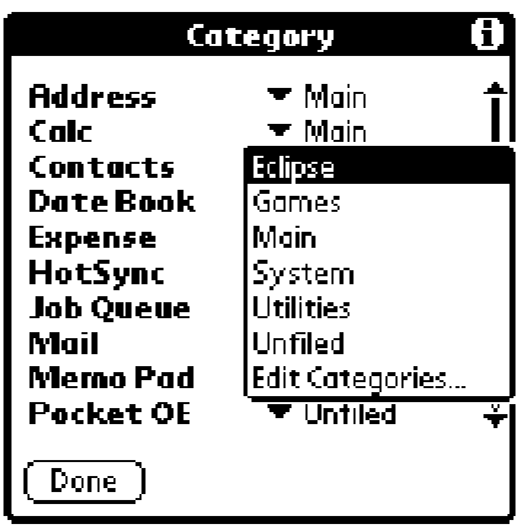


4. For each Palm SFA item, tap the associated drop-down (▼) and select the name of the custom category.

   The following are Palm SFA applications:

   - Contacts
   - Job Queue
   - Pocket OE
   - Prod Prefs
   - Scheduler

   For example, if you created a custom category called *Eclipse*, you would tap the drop-down to the right of **Contacts** and select **Eclipse** from the drop-down.

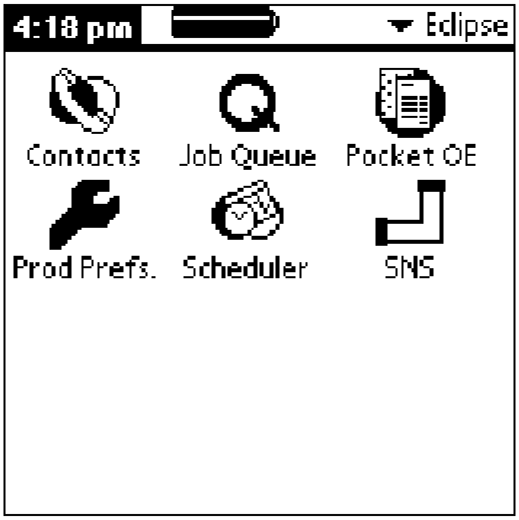


5. Tap **Done** to exit the Category screen.

To select a Palm SFA icon from the custom category:

1. Tap the **Applications** screen button on the Palm device screen to display the main Applications screen.
2. Tap the drop-down (▾) in the upper right corner of the screen and select the name of your custom category.

   Only those icons in your custom category display in the Application screen.

3. Tap an icon to start the application.

See Also:

Palm SFA Setup Overview

Starting Palm SFA Applications

Palm SFA Overview

Setting Up Palm SFA on the Host

Before you can use the Palm SFA application, you must modify the Eclipse application on the host system to work with Palm SFA.

Modifications include:

- Setting control maintenance records
- Configuring User Maintenance

  Set authorization keys, Scheduler parameters, and Job Queue options for Palm SFA users.
- Setting up message groups
- Adding User IDs to the access list of contact and customer records

  Add your user ID to the access list of each contact and customer record you want downloaded to the Palm device.

See Also:

Palm SFA Overview

Palm SFA Setup Overview

Setting Up Palm SFA on the Palm Device

Control Maintenance Records for Palm SFA

An administrator must set the following control maintenance records on the host system to customize your system for use with Palm SFA.

Set control maintenance records from Control Maintenance, accessed from the **System > System Files** menu in the Eclipse application on your computer desktop.

Palm SFA Control Maintenance Records

- Map Palm Phone Codes To Eclipse Phone Codes
- Palm Contact Customer Account Description Synchronization
- Palm SFA Administrator Settings
- Set System Time Zone
- SFA New Customer/Vendor Default Template
- User Maintenance Default Time Zone
- Valid Phone Codes
- Valid Scheduler Status
- Valid SFA Contact Classifications

Pocket Order Entry Control Maintenance Records

- Default Palm Pocket Order Entry Sales Source
- Default Remote Order Entry (ROE) Messaging
- Eclipse Ship Vias To Be Used With Palm Ship Vias
- Palm Pocket OE Administrator Settings
- Palm Product File Price Basis Fields To Be Downloaded
- Palm RDC And Pocket OE Default Product If Not Found
- Valid Palm Buy Line Product Download

  Note: If you select buy lines to download to the Palm device, we recommend that you not select price lines. Selecting one without the other makes for a smaller number of selected products. If you choose to download by both buy lines and price lines, the system only selects those products with a price line and a buy line listed in both control maintenance records. A product that matches one but not the other will not download.

- Valid Palm Price Line Product Download

  Note: If you select price lines to download to the Palm device, we recommend that you not select buy lines. Selecting one without the other makes for a smaller number of selected products. If you choose to download by both buy lines and price lines, the system only selects those products with a price line and a buy line listed in both control maintenance records. A product that matches one but not the other will not download.

- Valid Products For Palm Download By Status

See Also:

Palm SFA Overview

Setting Up Palm SFA on the Host

Setting Up Palm SFA on the Palm Device

Configuring User File Maintenance for Palm SFA

Before you can use the Palm SFA application, you must modify the host system to work with Palm SFA. Set the following Palm SFA parameters in User Maintenance for Palm SFA users:

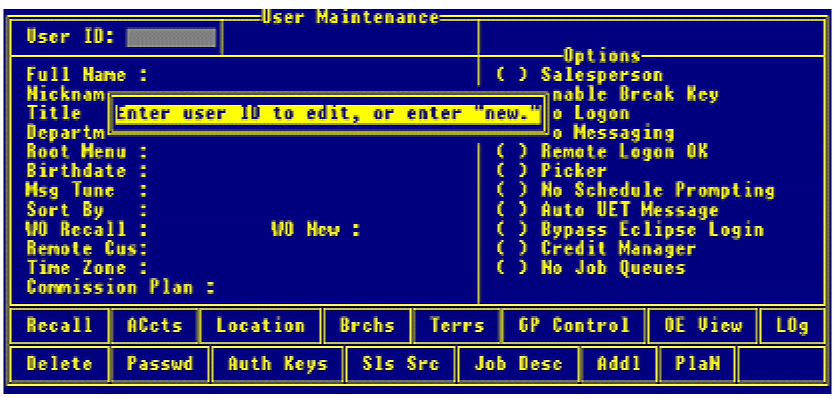
- Authorization keys
- Scheduler
- Job Queue
- Product download

Authorization Keys

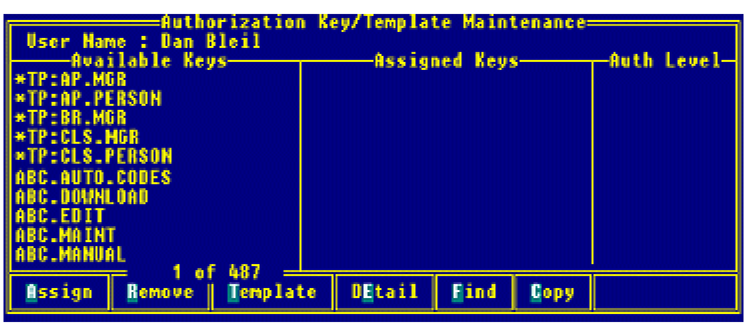
An administrator must set the following authorization keys and parameters for users to access Palm SFA features.

To set authorization keys for Palm SFA users:

1. From the **System > System Files / User Control** menu, select **User Maintenance** to display the User Maintenance screen.



2. In the **User ID** field, enter a user ID to display the corresponding user record.
3. Use the **Auth Keys** hot key to display the Authorization Key/Template Maintenance screen.



4. Assign the following authorization keys:
   - SFA.ALLOWED
   - SFA.MAINT

     We recommend you not assign the SFA.MAIN authorization key to users if you are using the Access Control List from Contact Maintenance and Customer Maintenance or using Mass Load to add your user ID to individual records.
   - DAILY.PLANNER
5. Press **Esc** until you exit User Maintenance to save changes to the user record.

See Also:

Setting Up Palm SFA on the Host

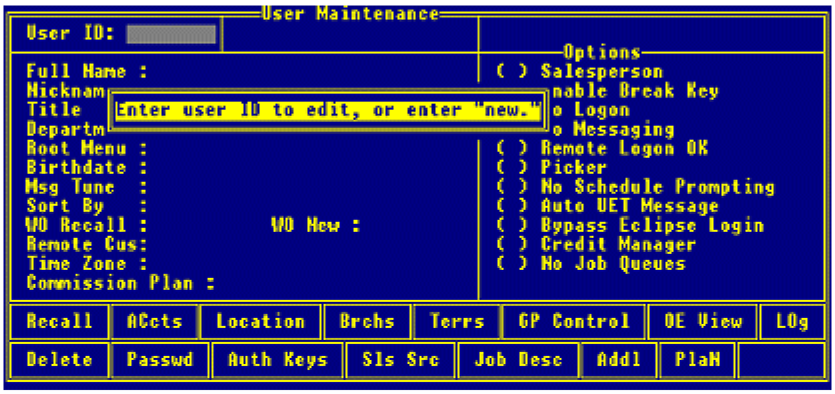
Setting Up Palm SFA on the Palm Device

Defining Scheduler Parameters for Palm SFA Users

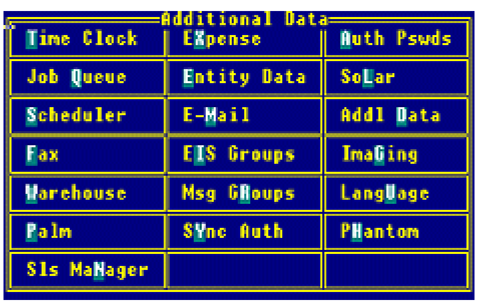
Before you can use the Palm SFA application, you must modify the host system to work with Palm SFA. Set the following Scheduler parameters for Palm SFA users. These settings work in conjunction with the Palm SFA Pocket Scheduler application.

To set Scheduler parameters for Palm SFA users:

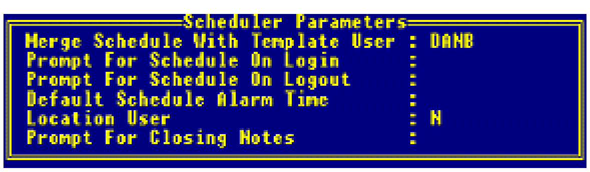
1. From the **System > System Files / User Control** menu, select **User Maintenance** to display the User Maintenance screen.



2. In the **User ID** field, enter a user ID to display the corresponding user record.
3. Use the **Addl** hot key to display the Additional Data screen.



4. Use the **Scheduler** hot key to display the Scheduler Parameters screen.



5. Complete the following fields:

Field	Description
Merge Schedule With Template User	If the user works the standard office hours set up for your company and a template user ID has been set up with those hours scheduled, you can instruct the system to copy the schedule set up for that ID into this user's schedule. Enter the template user ID in the **Merge Schedule With Template User** field. **Note:** The system copies all events with the Available and Busy statuses defined for the template user to this user's record.
Prompt For Schedule On Login	Indicates whether the system prompts the user to add an entry in the Daily Planner or their Daily Schedule when they log in. If blank, the default is Empty. Press **F10** and select Empty, Always, or Never. The option set in the Check Scheduler On Login control maintenance record determines the type of prompt that displays. If the **No Schedule Prompting** field is flagged on the User Maintenance screen, the system ignores the setting in this field.
Prompt For Schedule On Logout	Indicates whether the system prompts this user to enter today's schedule in the Daily Planner when they log out. The setting in this field only applies if the Check Schedule On Login control maintenance record is set to Daily Planner. If the **No Schedule Prompting** field is flagged on the User Maintenance screen, the system ignores the setting in this field.
Default Schedule Alarm Time	The default time in minutes that the Scheduler alerts the user about schedule events.
Location User	Indicate whether the system treats this user ID as a schedule location, such a conference room. • **Y** – This user ID is a schedule location. The system displays this user ID in the **F10** list for the **Location** field on the Schedule Detail Maintenance screen. • **N** – This user ID is not a schedule location.
Prompt For Closing Notes	Indicate whether you want the system to display the Closing Notes screen whenever this user marks a scheduled event as completed. • **Y** – Displays the Closing Notes screen. • **N –** Does not display the Closing Notes screen. **Note:** A value entered in this field overrides the setting in the Prompt For Scheduler Closing Notes control maintenance record. If left blank, the control record determines whether the closing notes screen displays.

See Also:

Configuring User File Maintenance for Palm SFA

Defining Job Queue Parameters for Palm SFA Users

Defining Product Download Parameters for Palm SFA Users

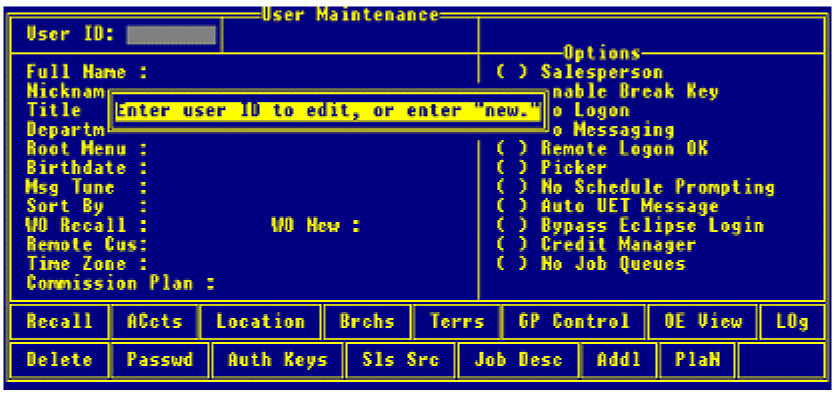
Setting Up Palm SFA on the Host

Defining Job Queue Parameters for Palm SFA Users

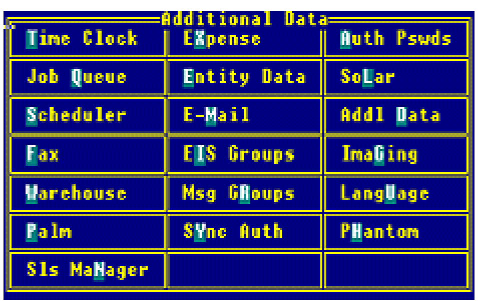
Before you can use the Palm SFA application, you must modify the host system to work with Palm SFA. Set the following Job Queue parameters for Palm SFA users. These settings work in conjunction with the Palm SFA Pocket Job Queue application.

To set Job Queue parameters for Palm SFA users:

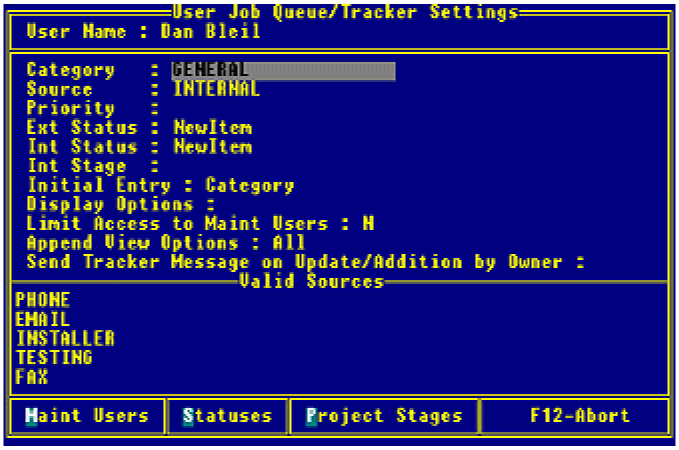
1. From the **System > System Files / User Control** menu, select **User Maintenance** to display the User Maintenance screen.



2. In the **User ID** field, enter a user ID to display the corresponding user record.
3. Use the **Addl** hot key to display the Additional Data screen.



4. Use the **Job Queue** hot key to display the User Job Queue/Tracker Settings screen.



5. Complete the following fields:

Field	Description
Category	The default category to which trackers created by the user are assigned. Press **F10** and select a category. The selected category determines the values available in the **Work Area** and **Sub Area** fields on the Call Tracking System screen.
Source	The default source that displays in the **Source** field on the Call Tracking System screen when the user creates a new tracker. Press **F10** and select a source.
Priority	The default priority that displays in the **Priority** field on the Call Tracking System screen when the user creates a new tracker. Press **F10** and select a priority.
Ext Status	The default external status that displays in the **Ext Status** field on the Call Tracking System screen when the user creates a new tracker. Press **F10** and select a status. You can create custom statuses for this user ID by using the **Statuses** hot key.
Int Status	The default internal status that displays in the **Int Status** field on the Call Tracking System screen when the user creates a new tracker. Press **F10** and select a status. You can create custom statuses for this user ID by using the **Statuses** hot key.
Int Stage	The default process flow stage the system uses when a supervisor assigns this user to a tracker. Set stages for this user ID by using the **Project Stages** hot key. **Note:** For internal Eclipse use only.
Initial Entry	The cursor's default placement on a new tracker's Call Tracking screen. Press **F10** and select the **Category** or **Sub Area** field. If you set a default value in the **Category** field, select the **Sub Area** field as the cursor's default placement.
Display Options	The default view for the user's User Job Queue Viewing screen. Press **F10** and select the view.

Field	Description
Limit Access to Maint Users	When the current user ID is set up as a queue, this field indicates whether to limit the use of this user ID to a list of maintenance users. Use the **Maint User** hot key to assign maintenance users. • **Yes –** Only the maintenance users can add this user ID to the Forwarding list in Call Tracking, delete this user ID from the Forwarding list, view the User Job Queue for this user ID, or change the follow up status on that queue. • **No** – All users, within the limits of their authorization, can add and delete this user ID on the Forwarding list in Call Tracking, view the User Job Queue for this user ID, and change the follow up status on that queue.
Append View Options	The append types the user can view in a tracker. Press **F10** and select a type. If left blank, the user can view all appends.
Send Tracker Message on Update/Addition by Owner	Indicates when the system sends a message to users on the tracker forward list when this user updates a tracker he or she originated. • **Never** – Never send a message. • **New –** Sends a message only when the tracker owner appends a new comment. • **All** – Sends a message whenever the tracker owner updates a previous comment or appends a new comment.
Valid Sources	The sources the user can enter in the **Source** field on the Call Tracking System screen to indicate the source of the tracker. For example, phone or e-mail.

See Also:

Assigning Maintenance Users to User IDs

Configuring User File Maintenance for Palm SFA

Defining Scheduler Parameters for Palm SFA Users

Defining Product Download Parameters for Palm SFA Users

Palm SFA Setup Overview

Setting Up Palm SFA on the Host

Setting User Job Queue and Tracker Defaults

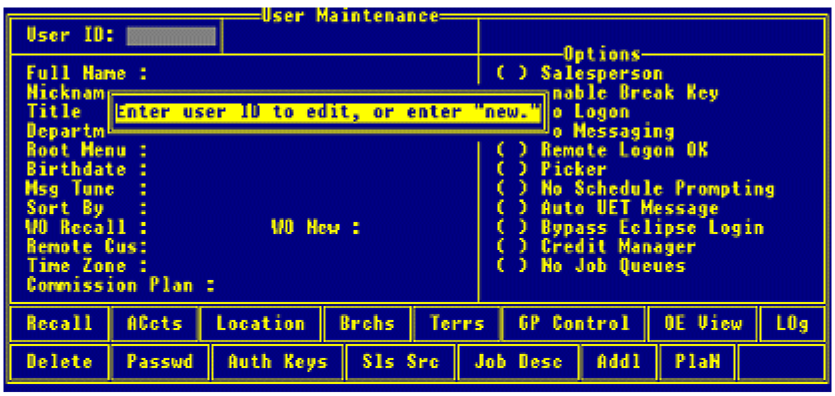
Defining Product Download Parameters for Palm SFA Users

The host system only downloads to the Palm device those products assigned to the buy lines and price lines defined for a user. If no price or buy lines are defined at the user level, the system downloads products assigned to the buy lines and price lines defined in the Valid Palm Buy Line Product Download and Valid Palm Price Line Product Download control maintenance records.

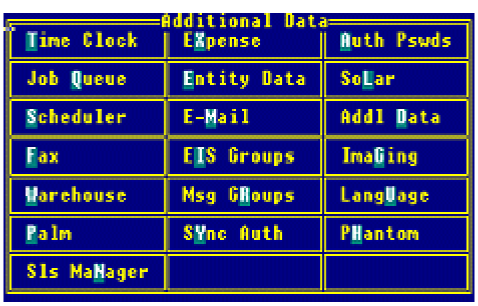
You can override the system-level defaults by defining user-specific product download parameters that determine the products and associated Reorder Pad information that Palm SFA users can using with the Pocket Order Entry (Pocket OE) application.

To define product download parameters for a Palm SFA user:

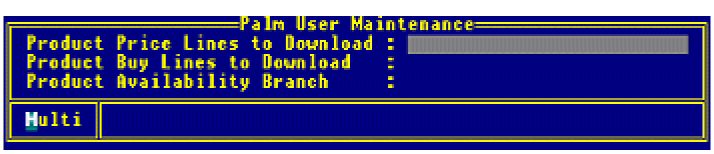
1. From the **System > System Files / User Control** menu, select **User Maintenance** to display the User Maintenance screen.



2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.



4. Use the **Palm** hot key to display the Palm User Maintenance screen.



5. In the **Product Price Lines to Download** field, press **F10** and select the price line this user can download to their Palm device. To specify multiple price lines, use the **Multi** hot key.
6. In the **Product Buy Lines to Download** field, press **F10** and select the buy line this user can download to their Palm device. To specify multiple buy lines, use the **Multi** hot key.
7. In the **Product Availability Branch** field, press **F10** and select the branches or territory for which to download product availability for this user.

   When the user synchronizes their Palm device, the host system downloads Reorder Pad product availability that is a cumulative tally of the product's availability for each branch entered in this field. If you leave this field blank, the system downloads availability for the user's home branch.
8. Press **Esc** until you exit User Maintenance to save the user record.

See Also:

Configuring User File Maintenance for Palm SFA

Creating User Records

Defining Scheduler Parameters for Palm SFA Users

Defining Job Queue Parameters for Palm SFA Users

Palm SFA Setup Overview

Setting Up Palm SFA on the Host

Setting Up Message Groups for Palm SFA

Before you can use the Palm SFA application, you must modify the host system to work with Palm SFA. Create a message group on the host named PALM.ADM and assign users to it. This message group allows the system to send those users system messages related to synchronization between the Palm device and the host system. Use a message group when your organization has multiple administrators monitoring Palm SFA activity on your system.

You can also use the message group to add a secondary administrator, for example, when the primary administrator is on vacation.

To create the message group PALM.ADM:

1. From the **System > System Files > User Control** menu, select **Message Group Maintenance**.
2. In the **Message Group ID** field, type **new**. The system prompts for you to enter the message group ID.
3. Enter **PALM.ADM**.
4. In the **Message Group Type** field, press **F10** and select **GROUP**. This option restricts who can view and edit messages sent to this group.
5. In the **Description** field, enter **Palm Message Group**.
6. Leave the **Security Level** field blank.
7. In the **User IDs** field, enter the User IDs of users who must receive system messages when Palm SFA synchronizes with the host system.
8. Press **Esc** to save changes and clear the screen.
9. Press **Esc** to exit the screen.

See Also:

Palm SFA Overview

Setting Up Palm SFA on the Host

Mass Loading User IDs to the Contact and Customer Access Lists

Before you can download data from a contact, customer, or vendor record on the host system to your Palm device, you must add your user ID to that record's access list. The SFA.MAINT authorization key allows access to update any customer account, regardless of the accessible branches defined for the customer or the user. Only assign this system-wide authorization key to the Palm SFA Administrator.

Use the Access Control List from Contact Maintenance and Customer Maintenance to add the User IDs of individual sales representatives to customer records.

You can also use the Mass Load application to select and update a large group of records at one time. Request the Eclipse Customer Access List and the Contact SFA List reports for Mass Load from your Palm SFA Support technician.

To use the Mass Load application to select and update records:

1. From the **Other > Tools** menu, select **Eclipse Report Writer**.
2. In the **Design ID** field, select either:
   - **CUST.ACCESS.LIST –** Selects Customer records.
   - **CONT.ACCESS.LIST –** Selects Contact records.
3. In the **Dict Item/Formula** column, position the cursor on the ADD.SFA.USER and use the **Set Val** hot key.
4. Enter the User ID and Level using the following format: "USERID,LEVEL" where LEVEL is one of the following:

LEVEL	Definition
0	*No Access*. The denoted User ID cannot download information from this record to their Palm device.
1, 2	*View Only or Review*. The denoted User ID can download information from this record to their Palm device, but cannot make changes to the record. Due to limitations in the Palm database, Palm SFA treats customer or contact records set to the Review status as view-only records. No changes are allowed. For more information on the Palm device restrictions, see Setting Up Palm SFA on the Host. We recommend you restrict user access to view only for customer records.
3	*Full Access*. The denoted User ID can download information from this record to their Palm device, make changes, and synchronize the updated information with the host system. We suggest you allow full user access to contact records.

For example, "JOSHB,3" allows the user with the User ID "JoshB" full access to the selected records.

5. Press **Esc** to return to the previous screen. Use the **Begin Load** hot key and then the **Begin** hot key to load these values onto the host system.

   Note: This process does over-write existing data of the selected records.

6. At the **No Input Fields Defined! <A>bort,<C>ontinue,<P>hantom,<S>chedule** prompt, press **C** to continue.
7. Press **Enter** when the update completes.
8. Press **Esc** to clear the Report Writer/Mass Load Design screen. Repeat steps 3 through 7 with the other report, if necessary.
9. Press **Esc** to exit the screen.

See Also:

Palm SFA Setup Overview

Setting Up Palm SFA on the Host

Setting Up Palm SFA on the Palm Device

Before you can use the Palm SFA application, you must set up the applications on the Palm device.

- Configuring Pocket Contacts
- Configuring Pocket Scheduler
- Configuring Pocket Job Queue
- Configuring Pocket Order Entry

See Also:

Palm SFA Overview

Setting Up Palm SFA on the Host

Setting Up Palm SFA on the Palm Device

Setting Palm SFA HotSync Preferences

Set Palm SFA HotSync preferences to determine how the application communicates with the host system when you synchronize data. Set HotSync preferences for each Palm SFA application:

- Pocket Contacts
- Pocket Scheduler
- Pocket Job Queue
- Pocket Order Entry

If you attempt to start an application prior to setting its HotSync preferences, the application displays the Sync Setup screen for the application you want to run.

> **Note:** As synchronizations can take a few minutes, depending on the amount of data needing to be transferred, you might want to synchronize after setting each application's HotSync preferences. As Palm SFA applications share data, you will notice that most preference fields populate after the first synchronization.

To set Palm SFA HotSync Preferences:

1. Start the Eclipse Palm application.
2. Tap the **Menu** screen button.
3. From the **Options** menu, select **HotSync Preferences**.
4. Complete the following fields:

Field	Description
Eclipse User ID / User ID	Your User ID. This is the same User ID you use to log onto the host system.
Password	Your password. This is the same password you use to log onto the host system. The first time you enter the password it is not masked. Thereafter, the password is hidden behind asterisks.
Host Name	The name of the host system running the Eclipse application. You can also use the IP address of the host name. **Note:** If you use multiple Eclipse companion products, verify this setting with your Palm SFA Support technician.
Serial # / Serial Num	This field is reserved for future implementation.

5. Select one or more of the following options:

Option	Description
Sync with Eclipse	Select this option to upload data from the Palm device to the host system whenever you synchronize your Palm device.
Auto Generate Paths	Palm SFA Support technicians use this option for troubleshooting. Use the default that displays. Clearing this option causes the **Set Paths** button to display. Use the **Set Paths** button to define the Sync Paths that Palm SFA uses to communicate with the host system.
Sync Acct Info	For Pocket Contacts, whether to also synchronize A/R information for customer and vendor accounts.
Sync Past ___ Day	For Pocket Scheduler, the amount of history to upload to the application. The default is 30 days.
Send Orders	For Pocket Order Entry (Pocket OE), select how you want to upload orders: • Every Time • This Time Only • Clear Sent Orders on Sync • Disable synchronization time out
Download Reorder Info	For Pocket OE, select how you want to download Reorder Pad information to the Palm device: • Every Time • This Time Only

6. Tap **OK** to save changes and return to the previous screen.
7. Synchronize your Palm device.

See Also:

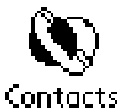
Setting Up Palm SFA on the Palm Device

Setting Product File HotSync Preferences

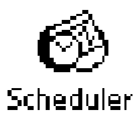
Starting Palm SFA Applications

To launch Palm SFA applications from the main Applications screen, use the following:

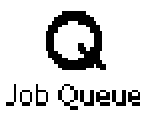
- **Contacts** icon – Starts Pocket Contacts



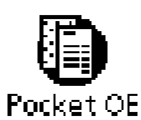
- **Scheduler** icon – Starts Pocket Scheduler



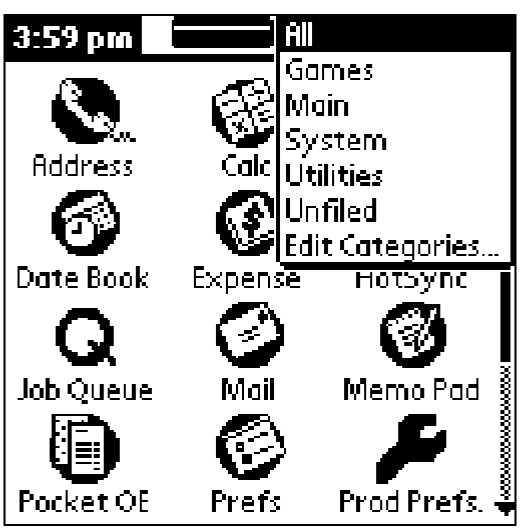
- **Job Queue** icon – Starts Pocket Job Queue



- **Pocket OE** icon – Starts Pocket Order Entry



If an icon does not display, tap the drop-down arrow in the upper right corner of the Applications screen and select **All** from the list of categories. Use the scroll bar to move through all available icons.



You can create a custom category on the Palm device to hold all your Palm SFA icons.

See Also:

Creating a Custom Category on the Palm Device

Palm SFA Overview

Pocket Contacts Overview

Pocket Job Queue Overview

Pocket Order Entry Overview

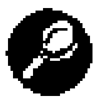
Pocket Scheduler Overview

Using the Palm Device Find Application

The Palm device has a built-in Find application, allowing you to locate any text, in any application on the device.

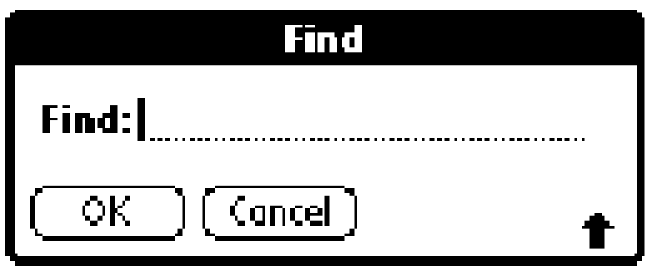
To use the Palm Find application:

1. On the Palm device, tap the **Find** screen button to display the Find screen.



Note: If you select text before tapping **Find**, the text appears in the Find screen.

2. On the Find screen, enter the text you want to locate.



Note: Find is not case-sensitive. Searching for "mary" also finds "Mary" and "Maryland."

3. Tap **OK**.

   The Find application searches for text in all records on the Palm device. You can halt a search at any time by tapping **Stop**.

   When complete, Find displays matching items beneath the name of the application where they were found.

   If a search returns more items than can fit on one screen, the **Find More** button displays.

4. Do one of the following:

Tap...	To...
a returned entry	display that entry in context of the application.
Cancel	exit Find and return to the previous screen.
Find More	continue searching.

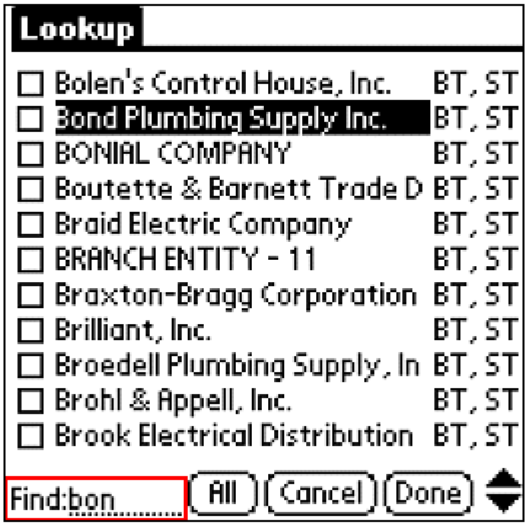
See Also:

Accessing Pocket Contacts Information

Finding Events on the Palm Device
Finding Trackers on the Palm Device
Using the Find Field in Palm SFA

Using the Find Field in Palm SFA

The **Find** field appears on some Palm SFA screens displaying a list of entries or records. As you enter characters in the **Find** field, the application highlights the items that match those characters.



For example, in the Pocket Contacts Address List, enter the letter **b** to display records that begin with B. Next enter the letters **on** to display records that begin with the letters Bon.

Tap the matching entry to view it.

See Also:

Accessing Pocket Job Queue Information

Palm SFA Overview

Using the Palm Device Find Application

Using the Default Editing Menu in Palm SFA

You can use the Palm device's editing menu from many screens in Palm SFA that have input fields.

Tap the **Menu** screen button and select **Edit** to display the Palm device editing menu.

Menu Item	Description
Undo	Reverses the last edit. For example, if you removed text, this function restores the text.
Cut	Removes the selected text and stores it in memory. You can **Paste** the text into another field in Palm SFA, or into another application on the Palm device.
Copy	Copies the selected text and stores it in memory. You can **Paste** the text into another field in Palm SFA, or into another application on the Palm device.
Paste	Inserts any text stored in memory at the selected point.
Select All	Selects all the text in the current field. You can then **Cut** or **Copy** the selection.
Keyboard	Displays the Keyboard screen. Use the Keyboard to choose the characters. Tap **Done** on the Keyboard screen to insert the text into the input field.
Graffiti Help	Displays the Graffiti screen, indicating the strokes necessary to enter characters.

See Also:

Palm SFA Overview

Using the Find Field in Palm SFA

Using the Palm Device Find Application

How Palm SFA Messages the Palm Administrator

When there are discrepancies between data uploaded from the Palm device and data stored on the host system, the application sends a message to the host system, which alerts the person or persons designated as Administrators through a message. The host system does not pass errors back to the Palm device.

It is the responsibility of the designated Administrator to review these messages and contact the Palm device users.

For example, a sales person using Pocket Order Entry (Pocket OE) creates an order and changes the pricing. When the order uploads, the host system detects an invalid price override and sends a message to the Palm Pocket OE Administrator. The Administrator reviews the message and order and contacts the sales person, instructing them to correct the order on the Palm device and to upload again.

The Administrator who receives error messages depends on the control maintenance records set for the application. For Pocket Order Entry (Pocket OE), use the Palm Pocket OE Administrator Settings control maintenance record. For other Palm Sales Force Automation (SFA) applications, use the Palm SFA Administrator Settings control maintenance record.

See Also:

Control Maintenance Records for Palm SFA

Palm SFA Overview

Palm SFA Setup Overview

Pocket Contacts Overview

Use to the Pocket Contacts application to download contact, customer, and vendor information from the host system to your Palm device. You can edit the information and then synchronize the data to update the records on the host system.

With Pocket Contacts, you can do either of the following:

- Have entity information with you while you are away from the office.
- Update entity information while you are visiting with customers or vendors and update the host system without re-keying the data.

Use the Palm Contact Customer Account Description Synchronization control maintenance record to determine which field in the system updates Customer Maintenance on the host and in Palm Contacts when syncing company name information. In Customer Maintenance, the system stores the company name in two fields; Palm devices store the company name in one field.

> **Note:** The Pocket Contacts application is separate from and unrelated to the Palm device's resident Address Book application.

See Also:

Palm SFA Overview

Accessing Pocket Contacts Information

To access information for contacts, customers, or vendors, tap the **Applications** screen button on the Palm device screen, and then tap the **Contacts** icon.

If the **Contacts** icon does not display on the screen, tap the drop-down (▾) in the upper right corner of the Palm device screen and select **All** from the list of categories.

The Pocket Contacts address list appears.

See Also:

Pocket Contacts Overview

Using the Palm Device Find Application

Viewing Pocket Contacts Records

Viewing the Pocket Contacts Address List

Managing Contacts Linked to Accounts in Pocket Contacts

The Contact Management screen lists the contacts linked to a customer / vendor account. The screen indicates the account and all contacts attached to that account. For each contact, the application displays the contact name (last name, first name), contact information, and contact type.

From this screen, you can do the following:

- Tap a contact entry to display the Eclipse Address View for that entry.
- Create a new contact record using the current address or work phone of the current account record as a template.
- Associate a contact with the current account.
- Delete a contact from the current account.

To display the Contact Management screen:

1. Start the Pocket Contacts application.
2. From the Address List, display the either the Accounts or the Contacts address list by tapping the **Acct** or **Cont** button.
3. Tap a record to display the Address View screen.
4. Tap the **Contacts** button to display the Contact Management screen.

To create a contact using the current account as a template:

1. Display the Contact Management screen.
2. From the Contact Management screen, tap **New** to display the Copy Preferences screen.
3. Select the information to copy from the current account:
   - Address.
   - Work telephone number.

   The application displays the Eclipse Entry Edit screen. By default, the new record contains the Company name.
4. Complete the fields on the Eclipse Entry Edit screen.
5. Tap **Done** to return to the previous screen.

To associate a contact to the current account:

1. Display the Contact Management screen.
2. From the Contact Management screen, tap **Attach** to display the Attach Link screen.
3. Select a contact entry to add to the current record.

If the contact entry is associated with a different account, the application prompts for confirmation before changing the contact's account.

4. Tap **OK** to save changes or **Cancel** to abort.
5. Tap **Done** to return to the previous screen.

To delete a contact from the current account:

1. Display the Contact Management screen.
2. From the Contact Management screen, tap **Remove** to display the Remove Link screen.
3. Select a contact entry to remove from the current record.

   The application prompts for confirmation.
4. Tap **Yes** to remove the link or **No** to cancel.
5. Tap **Done** to return to the previous screen.

See Also:

Creating Account or Contact Records in Pocket Contacts

Pocket Contacts Overview

Pocket Contacts Setup Overview

Before you can use the Pocket Contacts application, you must set the following:

- Access to Contact and Customer records on the host system
- HotSync preferences
- Pocket Contacts Preferences

Note: The Pocket Contacts application is separate from and unrelated to the Palm device's resident Address Book application.

Synchronize your Palm device with the host system before using Pocket Contacts. This initial synchronization ensures that customer and vendor information downloads to the Palm device.

See Also:

Mass Loading User IDs to the Contact and Customer Access Lists

Palm SFA Setup Overview

Setting Palm SFA HotSync Preferences

Set Palm SFA HotSync preferences to determine how the application communicates with the host system when you synchronize data. Set HotSync preferences for each Palm SFA application:

- Pocket Contacts
- Pocket Scheduler
- Pocket Job Queue
- Pocket Order Entry

If you attempt to start an application prior to setting its HotSync preferences, the application displays the Sync Setup screen for the application you want to run.

> **Note:** As synchronizations can take a few minutes, depending on the amount of data needing to be transferred, you might want to synchronize after setting each application's HotSync preferences. As Palm SFA applications share data, you will notice that most preference fields populate after the first synchronization.

To set Palm SFA HotSync Preferences:

1. Start the Eclipse Palm application.
2. Tap the **Menu** screen button.
3. From the **Options** menu, select **HotSync Preferences**.
4. Complete the following fields:

Field	Description
Eclipse User ID / User ID	Your User ID. This is the same User ID you use to log onto the host system.
Password	Your password. This is the same password you use to log onto the host system. The first time you enter the password it is not masked. Thereafter, the password is hidden behind asterisks.
Host Name	The name of the host system running the Eclipse application. You can also use the IP address of the host name. **Note:** If you use multiple Eclipse companion products, verify this setting with your Palm SFA Support technician.
Serial # / Serial Num	This field is reserved for future implementation.

5. Select one or more of the following options:

Option	Description
Sync with Eclipse	Select this option to upload data from the Palm device to the host system whenever you synchronize your Palm device.
Auto Generate Paths	Palm SFA Support technicians use this option for troubleshooting. Use the default that displays. Clearing this option causes the **Set Paths** button to display. Use the **Set Paths** button to define the Sync Paths that Palm SFA uses to communicate with the host system.
Sync Acct Info	For Pocket Contacts, whether to also synchronize A/R information for customer and vendor accounts.
Sync Past ___ Day	For Pocket Scheduler, the amount of history to upload to the application. The default is 30 days.
Send Orders	For Pocket Order Entry (Pocket OE), select how you want to upload orders: • Every Time • This Time Only • Clear Sent Orders on Sync • Disable synchronization time out
Download Reorder Info	For Pocket OE, select how you want to download Reorder Pad information to the Palm device: • Every Time • This Time Only

6. Tap **OK** to save changes and return to the previous screen.
7. Synchronize your Palm device.

See Also:

Setting Up Palm SFA on the Palm Device

Setting Product File HotSync Preferences

Setting Pocket Contacts Preferences

You can set access and display options to display when you access the application with your user ID. These settings personalize it for your use depending on the tasks that you use daily.

To set Pocket Contacts preferences:

1. Start the Pocket Contacts application.
2. Tap the **Menu** screen button and select **Preferences** from the **Options** menu.
3. In the Preferences dialog box, select the **Remember last database** option to instruct the application to remember whether you were viewing the accounts or the contacts address list and to display that view the next time you start the application.
4. Tap **OK** to save changes and return to the previous screen.

See Also:

Pocket Contacts Overview

Purging All Pocket Contacts Records

You can remove all contact and account information from the Palm device using the **Purge All Records** menu item. This only removes data from the Palm device, not from the host system. This purge function may be useful if you are assigned to a new set of customers or clients. You can delete the contacts you currently have and upload a new group to access.

Purging all contact and account records from the Palm device requires that you to re-select and re-synchronize account information for selected entities after you download contact information.

To purge all records:

1. Start the Pocket Contacts application.
2. Tap the **Menu** screen button and select **Purge All Records** from the **Record** menu.
3. In the Purge All Records dialog box, tap **Yes** to confirm. Or to abort the operation tap **No**.

See Also:

Deleting Pocket Contacts Records

Pocket Contacts Overview

Finding Pocket Contacts Version Number

You may need to find your version number of the Pocket Contacts application. For example, if you need to upgrade the application, you want to verify what version you are currently running.

To locate the Pocket Contacts' version number:

1. From the **Options** menu, select the **About Contact Manager**.

   The version number displays.

See Also:

Pocket Contacts Overview

Viewing the Pocket Contacts Address List

When you first access the Pocket Contacts application, the application displays the address list. By default, the address list for customer and vendor accounts displays. The **Acct** button at the bottom of the screen highlights to indicate that the application is displaying customer / vendor accounts.

Tap a record to view it.

Customer / Vendor Account Address List

Each record in the customer / vendor account address list contains the entity name followed by one or more abbreviations:

Abbreviation	Entry / Address Type
[Note]	The notes symbol appears when the entity has open transactions. Transaction and A/R information is view-only. For more information, see Viewing Notes for Pocket Contacts Accounts.
BR	Branch.
BR CASH	Branch cash account.
BT	Bill-To.
FV	Freight vendor.
M	Manufacturer.
P	Prospect.
PT	Pay-to.
SF	Ship-from.
ST	Ship-to.

You can do one of the following from this view:

- Tap the **Acct** or **Cont** buttons to toggle between the customer / vendor account address list and the contacts address list.
- Tap the **New** button to create a new customer or vendor record.
- Use the **Find** field to search for a name in the address list.

Contacts Address List

Whether sorted by last name/first name or by company name, each record in the contacts address list contains the contact's name, default telephone number, and an abbreviation that denotes which telephone number displays:

Abbreviation	Definition
[blank]	No telephone number provided.
F	Fax machine telephone number.
H	Home telephone number.

Abbreviation	Definition
M	Main telephone number or mobile / cellular telephone number.
O	Other telephone number.
P	Pager telephone number.
W	Work telephone number.

Note: A tilde (~) appears after a telephone number when additional information is saved in the contact record on the host system. For example, "555-555-1234~Desk."

You can do one of the following from this view:

- Tap the **Acct** or **Cont** buttons to toggle between customer / vendor accounts and contacts.
- Tap the **New** button to create a record.
- Use the **Find** field to search for a name in the address list.

Sorting Names in the Contacts Address List

You can select the order in which records appear in the Contacts Address List. Once selected, the sort order becomes your default until changed. Any time you add or change a contact entry, the address list re-sorts.

To sort names in contacts address list:

1. Display the Contacts address list by tapping the **Cont** button.
2. Tap the **Menu** screen button and select one of the following from the **Sort** menu:

Tap	To sort the Contacts address list...
Last Name, First Name	by the last name and then the first name of the contact. For example, "Doe, Jane."
Company, Last Name	by company name and then by the last name and then the first name of the contact. For example, "Yoyodyne Propulsion, Doe, John."

The application sorts the records as selected.

See Also:

Pocket Contacts Overview

Using the Palm Device Find Application

Viewing Pocket Contacts Records

Viewing Pocket Contacts Records

The Eclipse Address View screen displays information corresponding to the fields populated on the Eclipse Entry Edit screen. The fields are different for customer / vendor accounts and contacts.

You can view addresses by customer and vendor information or by contact information.

To display a record:

1. Start the Pocket Contacts application.
2. From the Address List, display the either the Accounts or the Contacts address list by tapping the **Acct** or **Cont** button.
3. Tap a record in the Address List to view it.

Using the Customer / Vendor Accounts Address View

From the customer / vendor address view, you can do the following:

- Tap the **Done** button to return to the previous screen.
- Tap the **Edit** button to display the Eclipse Entry Edit screen.
- **Note:** Tap anywhere in the Address View to enter the Eclipse Entry Edit screen.
- Tap the **Acct Info** button to display the Notes for [Account Name] screen when there are open transactions associated with the customer / vendor account.
- Tap the **Contacts** button to display the Contact Management screen, allowing you to view and edit contacts associated with the customer or vendor address.

Using the Contacts Address View

From the contacts address view, you can do the following:

- Tap the **Done** button to return to the previous screen.
- Tap the **Edit** button to display the Eclipse Entry Edit screen.

  Note: Tap anywhere in the Address View to enter the Eclipse Entry Edit screen.

- Tap the **Go to Acct** button to display customer or vendor information associated with the contact address.

See Also:

Accessing Pocket Contacts Information

Creating Account or Contact Records in Pocket Contacts

Pocket Contacts Overview

Creating Account or Contact Records in Pocket Contacts

You can create a customer / vendor account or contact record on the Palm device for upload to the host system.

Depending on your authorization, you can edit existing records and upload the changes to the host system.

You might use the SFA New Customer/Vendor Default Template for prospects.

To create a record for accounts or contacts:

1. Start the Pocket Contacts application.
2. From the Address List, display the either the Accounts or the Contacts address list by tapping the **Acct** or **Cont** button.
3. Tap the **New** button.

   The application displays the Eclipse Entry Edit screen.
4. Populate the fields on the Eclipse Entry Edit screen. It is not necessary to populate all fields to save the record.

Field	Definition
Last Name	Last name. Complete this field for contact records only.
First Name	First name. Complete this field for contact records only.
Title	For Contacts, the salutation or professional title. For example, "Ms." or "Dr." For Customer / Vendor accounts, the address type. For example, "BT" for Bill-To addresses.
Company	Company name for which the person is connected.

Field	Definition
[Contact information]	Palm SFA provides six drop-downs (▼), allowing you to select from the following seven contact information categories to categorize the type of information you want to capture: • Work • Home • Fax • Mobile • Other • Main • Pager Data uploaded from Customer Maintenance is often too general to use as contact information for an individual. That is, most telephone numbers stored would connect you with a customer's site, not an individual. Create individual records for contacts at a customer site. **Note:** A tilde (~) following a contact number indicates that the system uploaded the information and attempted to map it to a matching category. For example, 555-123-4567~Office is mapped to **Other**.
E-mail	Entity's e-mail address. Use the format: username@domain
Web	Entity's World Wide Web address. Use the format: www.name.domain. For example, www.eclipseinc.com
Address	Street address. This field allows up to 70 characters.
City	City.
State	State. Use the two letter state abbreviation. For example, CO for Colorado.
Zip Code	ZIP code. **Note:** The host system validates the zip code and city name in both accounts and contacts when syncing. Entering an invalid zip code causes the host system to message the PALM.ADM message group.
Class	Contact's classification
Eclipse #	Customer, Vendor, or Contact Entity ID
RSVD 2	Reserved for future development.
RSVD 3	Reserved for future development.
RSVD 4	Reserved for future development.
Note	Reserved for future development.

5. Tap **Done** to save changes and return to the previous screen.

To edit a customer / vendor account or contact record:

1. Start the Pocket Contacts application.
2. From the Address List, display the either the Accounts or the Contacts address list by tapping the **Acct** or **Cont** button.

3. Select a record.
4. Tap the **Edit** button.

   The application displays the Eclipse Entry Edit screen.
5. Edit the fields on the Eclipse Entry Edit screen.
6. Tap **Done** to save changes and return to the previous screen.

See Also:

Managing Contacts Linked to Accounts in Pocket Contacts

Pocket Contacts Overview

Setting Up Message Groups for Palm SFA

Viewing Pocket Contacts Records

Deleting Pocket Contacts Records

You can delete one contact record at a time. Deleting the record from the Palm device also removes you from the access list.

To delete a contact entry:

1. Start the Pocket Contacts application.
2. From the Address List, display the either the Accounts or the Contacts address list by tapping the **Acct** or **Cont** button.
3. Tap the record you want to delete to display the Eclipse Address View screen.
4. Tap the **Menu** screen button and select **Delete Record** from the **Record** menu.
5. In the Delete Entry dialog box, tap **OK** to confirm. Otherwise, abort the operation by tapping **Cancel**.

See Also:

Purging All Pocket Contacts Records

Viewing Notes for Pocket Contacts Accounts

When the Notes symbol displays to the right of a customer / vendor account, you can view open transactions associated with the account.

Tap the Notes symbol or **Notes** button to display the Notes for [Account Name] screen, where "Account Name" is the customer or vendor name.

To view pocket contacts notes:

1. On the Notes for [Account Name] screen, tap the category to display to view a list of transactions within the category.
   - Both Customer / Vendor account notes include the following:

Open bids	For each item, the Palm displays the transaction number, order status code (**B** for Bid), date, and total amount. Tap an item to expand the information to show each line of the transaction.
Open orders	For each item, the Palm displays the transaction number, order status code, date, and total amount. Tap an item to expand the information to show each line of the transaction.

   - Order statuses include the following:

D	Direct
A	Ship When Available
S	Ship When Specified
M	Ship Item Complete
H	Ship When Complete
L	Call When Available
W	Call When Specified
C	Call When Complete

   - Only Customer account notes include the following:

Open A/R	For each item, the Palm displays the transaction number, order status code (**I** for Invoiced, or **[Blank]** for not invoiced), date, and total amount. Tap an item to expand the information to show each line of the transaction
A/R statistics	Allows access to A/R information, current as of the last time you synchronized the account. Tap an entry to expand the information: • **Aging** Displays dollar amounts for future, current, 31-60 days, 61-90 days, 91-120 days, over 120 days, and total A/R. • **Sales Statistics** Displays dollar amounts for deposits, orders, month-to-date sales, year-to-date sales, 12-month average, 12-month high, and payment days. • **Credit** Displays terms, credit limit, last sale, last payment, and available credit.

2. Tap **Done** to return to the previous screen.
3. Tap **Back to Notes** to return to the Notes for [Account Name] screen.

See Also:

Creating Account or Contact Records in Pocket Contacts

Pocket Contacts Overview

Pocket Scheduler Overview

Use the Pocket Scheduler application to download your schedule from the host system to your Palm device. You can edit the information and then synchronize the data to update the records on the host system.

Although you cannot schedule meetings on the Palm device using Pocket Scheduler, you can download and review information about those meetings that were added to your schedule on the host system.

With Pocket Scheduler, you can do the following:

- Carry your schedule with you when you are out of the office.
- Create new events on the Palm device and upload them to the host system.

See Also:

Accessing Pocket Scheduler Information

Palm SFA Overview

Accessing Pocket Scheduler Information

Use the Pocket Scheduler application to download your schedule from the host system to your Palm device.

You must ensure you have set up your pocket scheduler preferences before beginning. For example, if you attempt to start an application prior to setting its HotSync preferences, the application displays the Sync Setup screen for the application you want to run.

To launch the Pocket Scheduler application:

1. Tap the **Applications** screen button on the Palm device screen.
2. Tap the **Scheduler** icon.
3. If the **Scheduler** icon does not display on the screen, tap the drop-down (▾) in the upper right corner of the Applications screen and select **All** from the list of categories.
4. Use the vertical scroll bar to move through all available icons.

   By default, the Daily Schedule screen appears.

See Also:

Pocket Scheduler Overview

Using the Pocket Scheduler Daily View

Pocket Scheduler Setup Overview

Use the Pocket Scheduler application to download your schedule from the host system to your Palm device. Before you can use the Pocket Scheduler, you must set the following preferences and options:

- HotSync Preferences
- Pocket Scheduler Preferences
- Pocket Scheduler Display Options

Synchronize your Palm device with the host system before using Pocket Scheduler to create events. This initial synchronization ensures that the Palm device recognizes which version of the host system scheduling application is available, and that event information downloads.

See Also:

Palm SFA Setup Overview

Pocket Scheduler Overview

Setting Pocket Scheduler Preferences

Setting Palm SFA HotSync Preferences

Set Palm SFA HotSync preferences to determine how the application communicates with the host system when you synchronize data. Set HotSync preferences for each Palm SFA application:

- Pocket Contacts
- Pocket Scheduler
- Pocket Job Queue
- Pocket Order Entry

If you attempt to start an application prior to setting its HotSync preferences, the application displays the Sync Setup screen for the application you want to run.

> **Note:** As synchronizations can take a few minutes, depending on the amount of data needing to be transferred, you might want to synchronize after setting each application's HotSync preferences. As Palm SFA applications share data, you will notice that most preference fields populate after the first synchronization.

To set Palm SFA HotSync Preferences:

1. Start the Eclipse Palm application.
2. Tap the **Menu** screen button.
3. From the **Options** menu, select **HotSync Preferences**.
4. Complete the following fields:

Field	Description
Eclipse User ID / User ID	Your User ID. This is the same User ID you use to log onto the host system.
Password	Your password. This is the same password you use to log onto the host system. The first time you enter the password it is not masked. Thereafter, the password is hidden behind asterisks.
Host Name	The name of the host system running the Eclipse application. You can also use the IP address of the host name. **Note:** If you use multiple Eclipse companion products, verify this setting with your Palm SFA Support technician.
Serial # / Serial Num	This field is reserved for future implementation.

5. Select one or more of the following options:

Option	Description
Sync with Eclipse	Select this option to upload data from the Palm device to the host system whenever you synchronize your Palm device.
Auto Generate Paths	Palm SFA Support technicians use this option for troubleshooting. Use the default that displays. Clearing this option causes the **Set Paths** button to display. Use the **Set Paths** button to define the Sync Paths that Palm SFA uses to communicate with the host system.
Sync Acct Info	For Pocket Contacts, whether to also synchronize A/R information for customer and vendor accounts.
Sync Past ___ Day	For Pocket Scheduler, the amount of history to upload to the application. The default is 30 days.
Send Orders	For Pocket Order Entry (Pocket OE), select how you want to upload orders: • Every Time • This Time Only • Clear Sent Orders on Sync • Disable synchronization time out
Download Reorder Info	For Pocket OE, select how you want to download Reorder Pad information to the Palm device: • Every Time • This Time Only

6. Tap **OK** to save changes and return to the previous screen.
7. Synchronize your Palm device.

See Also:

Setting Up Palm SFA on the Palm Device

Setting Product File HotSync Preferences

Setting Pocket Scheduler Preferences

Use the Pocket Scheduler application to download your schedule from the host system to your Palm device. You must first set your preferences for the scheduler on your Palm device.

To set Pocket Scheduler preferences:

1. Start the Pocket Contacts application.
2. Tap the **Menu** screen button.
3. From the **Options** menu, select **HotSync Preferences**.
4. Use the following fields, as needed:

Field	Tap to...
Start Time	set the earliest time to display in the Daily Schedule view. This time displays by default.
End Time	set the latest time to display in the Daily Schedule view. If you set a time-of-day range that is too large to fit on the screen, **Up Arrow** and **Down Arrow** buttons appear, allowing you to move up or down through the list.
Font	select the font used to display information in the Pocket Scheduler application.
Create closing note	require entering a note whenever you tap the **Completed** check box next to an event.
Alarm Preset	set an alarm for every new event created, including untimed events. The default is 5 minutes. You can change this if needed. Change the following fields: • **5** – Select an interval quantity between 1 and 99. The default is 5.This field works in conjunction with the **Minutes** field which identifies the interval type. • **Minutes** – From the drop-down field, select the interval type: minutes, hours, or days. The default is Minutes.
Alarm Sound	select an alarm sound for from a list of pre-set patterns.
Remind Me	select the number of times the alarm sounds for an event from a list of pre-set times.
Play Every	select the interval between alarms from a list of pre-set times.

5. Tap **OK** to save changes and return to the previous screen.

See Also:

Creating Events in Pocket Scheduler

Pocket Scheduler Overview

Setting Pocket Scheduler Display Options

Setting Pocket Scheduler Display Options

Use the Pocket Scheduler application to download your schedule from the host system to your Palm device. You must first set your display options on your Palm device. Use the Display Options screen to change the elements that appear in the Daily, Weekly, and Monthly Schedule views.

To set Pocket Scheduler Display Options:

1. Start the Pocket Contacts application.
2. Tap the **Menu** screen button.
3. From the **Display Options** menu, select **Options**.
4. Use the following fields as needed:

View	Option	Displays...
Day View	**Show Time Bars**	duration bars for all events on the Daily Schedule view. Duration bars indicate the span of time between the start time and end time. This option is selected by default.
	Compress Day View	only those time slots containing scheduled events, beginning with the start time set in Preferences. This option is selected by default.
	Show Completion	completion select boxes on the Daily Schedule view for all events. This option is selected by default.
Month View	**Show Timed Events**	marks indicating timed events on the Monthly Schedule view. This option is selected by default.
	Show Untimed Events	marks indicating untimed events on the Monthly Schedule view.
	Show Daily Repeating Evts	marks for daily repeating events on the Monthly Schedule view.
All Views	**Show Completed Events**	completed events – those events where the **Completed** check box is marked on the Daily Schedule view – on any of the schedule views. **Note:** The system synchronizes completed events with the host system, whether or not the Valid Scheduler Status control maintenance record contains a **Completed** status. This option is selected by default.

5. Tap **OK** to save changes and return to the previous screen.

See Also:

Using the Pocket Scheduler Daily View

Using the Pocket Scheduler Monthly View

Using the Pocket Scheduler Weekly View

Purging All Scheduled Events for Pocket Scheduler

Remove all scheduled events from the Palm device using the **Purge All Records** menu item. This only purges data from the Palm device, not from the host system.

To purge all scheduled events:

1. Start the Pocket Scheduler application.
2. Tap the **Menu** screen button.
3. From the **Record** menu, select **Purge All Records.**
4. In the Purge All Records dialog box tap **OK** to confirm. Abort the operation by tapping **Cancel**.

See Also:

Deleting Events in Pocket Scheduler

Pocket Scheduler Overview

Finding Pocket Scheduler Version Number

You may need to find your version number of the Pocket Scheduler application. For example, if you need to upgrade the application, you want to verify what version you are currently running.

To locate the Pocket Scheduler's version number:

1. From the **Options** menu, select the **About Scheduler**.

   The version number displays.

See Also:

Pocket Scheduler Overview

Using the Pocket Scheduler Daily View

When you first access the Pocket Scheduler application, the application displays the Daily Schedule screen, for the current date. Selecting a date from the Weekly or Monthly views also return you to the Daily Schedule screen.

About the Daily Schedule View

The Daily Schedule View screen contains the following elements:

- The date displays in the upper left corner of the screen.
- The week displays in the upper right corner of the screen with the current day highlighted. Tap the **Left Arrow** to move to the previous week. Tap the **Right Arrow** to move to the next week.
- The time of day, in one hour increments, displays on the left side of the screen. **Up Arrow** and **Down Arrow** buttons appear at the bottom right side of the screen when you select a date and there are more events for that date than can display on the screen.

  Note: If the Palm device is set to mask private records, events marked private are hidden in the Pocket Scheduler application.

- Events appear to the right of the time of day and completed columns. *Timed* events display next to their scheduled time. *Untimed* events appear at the top at the list.
- Icons display after events with additional characteristics, such as the following:

Icon	Title	Description
	Alarm	Event has a reminder alarm set.
	Note	Event has a private or public note attached.
	Repeat	Event is scheduled to repeat.

Icon	Title	Description
⬣	**View**	Another user owns this event. This event was uploaded from the Eclipse application.

- Schedule view choices display at the bottom left side of the screen. Tap to choose a different view:

Icon	Title	Description
▪	**Daily**	The Daily Schedule view is the default view.
....	**Weekly**	The Weekly Schedule view displays a seven-day view of the current week. Selecting a day and time returns you to the Daily Schedule screen for that date. The cursor appears in the selected time of day.
⠿	**Monthly**	The Monthly Schedule view displays the current month. Selecting a day returns you to the Daily Schedule screen.

Setting Options in Pocket Scheduler

Use the Pocket Scheduler Display Options screen to set the following options:

- Timed events have a span bar between the starting and ending times in the time of day column.
- To compress the view by omitting hour increments without scheduled events. For example, your Start Time and End Time are set to 6:00AM and 10:00PM, respectively. On a day without events, the view displays blank hourly increments, beginning at 6:00AM. On a day with several events throughout the day, the view omits blank hour increments to display as many events as possible.
- Untimed events display as a diamond in the time of day column. Tap the diamond icon to display the Set Time screen to change the event to a timed event.
- A selected check box appears to the right of the time of day column. You can only complete events that you create.
- Completed events continue to display in the view.
- Create new events.
- View or edit event details.
- Display the current date from the Go to Date screen. The current date appears in parenthesis.

See Also:

Creating Events in Pocket Scheduler

Editing Event Details in Pocket Scheduler

Creating Events in Pocket Scheduler

You can create two types Pocket Scheduler events: timed and untimed. A *timed* event has a start and end time, for example, meetings or appointments. An *untimed* event is an informative event or notation associated with a date, but not a time, such as a birthday or vacation day. Both timed and untimed events can be set to repeat.

To create a timed event:

1. Start the Pocket Scheduler application.
2. Display the Daily Schedule screen for the date you want to schedule the event.
3. Tap the **New** button to display the Set Time screen.

   Note: You can also tap the event line next to the time of day you want for the **Start Time**, enter an event description, and then tap outside the event description. The **End Time** defaults to one hour later. You can then tap the **Details** button to edit the event details.

4. Tap the **Start Time** box to activate it.
5. Tap the hour column to select an hour and then tap the minute column to select the minutes.

   Note: If the hour does not appear in the column, tap the **Up Arrow** or **Down Arrow** to move to the correct hour.

   The End Time defaults to be one hour after the Start Time.

6. Tap the **End Time** box to activate it. Edit the time by doing one of the following:
   - Tap the hour and minute columns, as in step 4.
   - Enter three or four digits for the end time.

     Note: You do not need to enter a separator between the hour and minutes. The final digit must be 0 or 5. This option works best for end times where the system cannot confuse the digits, for example, 12:50 and 1:25 and 1:00 and 10:00.
7. Tap **OK** to save changes and return to the previous screen.

To create an untimed event:

1. Start the Pocket Scheduler application.
2. Display the Daily Schedule screen for the date you want to schedule the event.
3. Tap the **New** button to display the Set Time screen.
4. Tap **No Time**.

   The Daily Schedule screen displays with the cursor in the new event, at the top of the events.

5. Enter an event description.
6. Tap outside of the event description to save your changes.

See Also:

Pocket Scheduler Overview

Using the Pocket Scheduler Daily View

Deleting Events in Pocket Scheduler

You can delete from your Schedule the events that you create. You cannot delete events that you did not create and do not own. You can delete events using the Detail button or the Menu button.

Note: If you know a word in the event description, you can search the Palm device for the event, using the Palm Find application.

To delete an event using the Detail button:

1. Start the Pocket Scheduler application.
2. Display the Daily Schedule screen.
3. Tap **Details** to display the Event Details screen.

   Note: If the event is scheduled on the host system and downloaded to the Palm device, the application displays the View Only Details screen.

4. The application prompts for confirmation. Do one of the following:
   - If the event repeats, the application prompts whether to delete the current event, all occurrences of the event, or cancel and return to the previous screen.
   - If the event does not repeat, tap **OK** to delete the event and return to the previous screen.

To delete an event using the Menu button:

1. Start the Pocket Scheduler application.
2. Display the Daily Schedule screen.
3. Tap the **Menu** screen button and select **Delete Event** from the **Record** menu.
4. When the application prompts for confirmation, do one of the following:
   - If the event repeats, the application prompts whether to delete the current event, all occurrences of the event, or cancel and return to the previous screen.
   - If the event does not repeat, tap **OK** to delete the event and return to the previous screen.

See Also:

Creating Events in Pocket Scheduler

Editing Event Details in Pocket Scheduler

Pocket Scheduler Overview

Editing Event Details in Pocket Scheduler

You can view and edit events that you have created. Use the Event Details screen to identify which event to edit.

Note: If you know a word in the event description, you can search the Palm device for the event, using the Palm Find application.

To edit event details:

1. Start the Pocket Scheduler application.
2. Display the Daily Schedule screen.
3. Tap **Details** to display the Event Details screen.

   Note: If the event is scheduled on the host system and downloaded to the Palm device, the application displays the View Only Details screen.

4. Edit the following fields as needed:

Field	Tap to...
Time	display the Set Time screen. Use this screen to edit the start and end times of an event.
Date	display the Set Date screen. Use this screen to select the year, month, and day for the event. Tap **Today** to go to the current date.
Alarm	set a reminder alarm. The application defaults to five minutes. The two fields display to set the amount of time before the event to sound the alarm: • **5** – Select an interval quantity between 1 and 99. • **Minutes** – From the drop-down field, select the interval type: minutes, hours, or days. For example, for a timed event, such as a meeting, use the default reminder time of 5 Minutes before the meeting so you have time to walk or to prepare. For an untimed event, such as someone's birthday, set a reminder for 5 Days before the date so you have time to purchase and mail a card.
Repeat	display the Change Repeat screen. Use this screen to select an interval to make the event repeat.
Entity	display the Attached Entities screen. Use this screen to add one or more customer or vendor records to the event. • To add an entity, tap **Add Entity** and select a customer or vendor record from the address list. Tap **Done** to return to the previous screen. • To remove an entity, tap the record name. The application prompts for confirmation. Tap **Done** to return to the previous screen. When a single entity is attached, the record name appears in the **Entity** field. When more than one entity is attached, ***Multiple*** displays.
Private	make the event private. When checked, only you can view the description and details of the event.

5. Tap a button, as required:

Button	Description
Delete	Remove event from schedule. The application prompts for confirmation. You can also attach notes using the **Menu** screen button. From the Daily Schedule view, tap the **Menu** screen button and select **Attach Notes** from the **Record** menu.
Addl	Displays the Additional Details screen.
Notes	Displays the Notes screen. Enter or delete notes about the event. Select the type of note to enter before typing the information: • **Private** – Only you can view them. You can create one Private note. Tap to enter, view, or delete it. • **Public** – Anyone can view them. You can create one Public note. Tap to enter, view, or delete it. **Note:** Attaching a note to or deleting a note from a repeating event, causes the system to prompts for confirmation. Indicate whether you want to apply the change to the current event in the series, all events in the series, or to cancel. You can also attach notes using the **Menu** screen button. From the Daily Schedule view, tap the **Menu** screen button and select **Attach Notes** from the **Record** menu.

6. Tap **OK** to save changes and return to the previous screen.

See Also:

Adding Additional Information to Events in Pocket Scheduler

Creating Events in Pocket Scheduler

Making Events Repeat in Pocket Scheduler

Pocket Scheduler Overview

Reviewing Details of View Only Events in Pocket Scheduler

Making Events Repeat in Pocket Scheduler

Use the Change Repeat screen to select an interval to cause an event to repeat. The screen displays five repeat interval options: none, day, week, month, and year. Each option has its own settings.

Note: If you know a word in the event description, you can search the Palm device for the event, using the Palm Find application.

To set a repeat interval:

1. Start the Pocket Scheduler application.
2. Display the Daily Schedule screen.
3. Tap **Details** to display the Event Details screen.

   Note: If the event is scheduled using the Eclipse application and downloaded to the Palm device, the application displays the View Only Details screen.

4. Tap the value in the **Repeat** field. The default is None.

   The Palm displays the Change Repeat screen.

5. Tap one of the following to select:

Option	Description
None	The event does not repeat. This value is the default.

Day	The following fields display:
	• **Every ___ Day(s)** – Select an interval quantity between 1 and 99. The default is 1.
	• **End on** – From the drop-down field, select when the repeating interval ends:
	  • **Choose Date...** – Displays the Ending On screen where you can select the ending year, month, and day.
	  • **No End Date** – The event repeats until it is deleted. The default is No End Date.
	For example, "Every other day" or "Every third day."

Week	The following fields display:
	• **Every ___ Week(s)** – Select an interval quantity between 1 and 99. The default is 1.
	• **End on** – From the drop-down field, select when the repeating interval ends:
	  • **Choose Date...** – Displays the Ending On screen where you can select the ending year, month, and day.
	  • **No End Date** – The event repeats until it is deleted. The default is No End Date.
	• **Repeat on** – Select the day or days of the week on which the event repeats. The default is the current day of the week.
	For example, "Every week on Tuesday and Thursday" or "Every second week on Wednesday."

Option	Description

Month	The following fields display:
	• **Every ___ Month(s)** – Select an interval quantity between 1 and 99. The default is 1.
	• **End on** – From the drop-down field, select when the repeating interval ends:
	  • **Choose Date...** – Displays the Ending On screen where you can select the ending year, month, and day.
	  • **No End Date** – The event repeats until it is deleted. The default is No End Date.
	• **Repeat by** – Select how the application interprets the current date:
	  • **Day** – The day of the week in one of the weeks of the month. For example, "the 4th Thursday of every month" or "the last Wednesday of every month." The default is Day.
	  • **Date** – The numeric date. For example, "The 25th of every month."

Year	The following fields display:
	• **Every ___ Year(s)** – Select an interval quantity between 1 and 99. The default is 1.
	• **End on** – From the drop-down field, select when the repeating interval ends:
	  • **Choose Date...** – Displays the Ending On screen where you can select the ending year, month, and day.
	  • **No End Date** – The event repeats until it is deleted. The default is No End Date.
	For example, "March 31st every year" or "November 3rd every 4th year."

6. Tap **OK** to save changes and return to the previous screen.

Considerations When Using the Repeat Function

If you change specific settings for events, there are results that the system calculates for you:

- If you change the start date of a repeating event with an end date, the application calculates the number of days you moved the event and then changes the end date to maintain the original duration of the event.
- If you change the date of a repeating event with an end date and apply the change to all occurrences, the new date becomes the start date of the repeating event and the end date is adjusted to maintain the duration of the event.
- If you change the repeat type, start or end times, alarm, or privacy settings, the application creates a new repeating event for the current and future events using the new settings, and leaves past occurrences of the repeating event as they were.
- If you change the one occurrence of a repeating event, the application creates a new event for that occurrence. The event does not display the **Repeat** icon.

See Also:

Creating Events in Pocket Scheduler

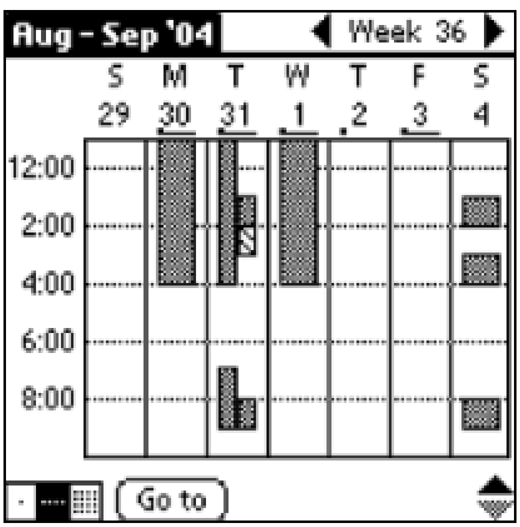
Editing Event Details in Pocket Scheduler

Pocket Scheduler Overview

Pocket Scheduler Weekly View

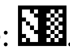
The Weekly Schedule view displays a week-at-a-glance schedule for the week in which the current date falls. Display the Weekly Schedule view by tapping the Weekly icon on the Daily Schedule or Monthly Schedule views. Use the Pocket Scheduler Display Options screen to set whether completed events continue to display in the view. You can also tap **Go to** and display the Go to Date screen to select a year, month, or day to view. The current date appears in parenthesis.

The Weekly Schedule screen contains the following elements:



- The month and year display in the upper left corner of the screen.
- The week in which the current date falls displays in the upper right corner of the screen. Tap the **Left Arrow** to move to the previous week. Tap the **Right Arrow** to move to the next week.
- The time of day, beginning with the value in the **Start Time** field on the Scheduler Preferences screen, displays on the left side of the screen.

- Days of the week display as a letter indicating the day of the week (**S** for Sunday, **M** for Monday, and so forth) above a number indicating the date. Tap the letter/number pair to go to the Daily Schedule view.
- Timed and untimed events:
  - Timed events display before or after the given times display as lines above or below the day of the week columns. **Up Arrow** and **Down Arrow** buttons appear at the bottom right side of the screen when there are more events than can be displayed on the screen.
  - Untimed events display as dots below the letter/number pair.
- Timed events display as shaded rectangles within the day of the week columns, according to their start and end times. Tap an event to view a summary of the event.

  Conflicting events display next to each other. When there are more than two conflicting events, one event displays as a light-colored rectangle. For example: .
- Schedule view choices display at the bottom left side of the screen. Tap to choose a different view:

Icon	Title	Description
	**Daily**	The Daily Schedule view displays the selected date.
	**Weekly**	The current view.
	**Monthly**	The Monthly Schedule view displays the current month.

See Also:

Pocket Scheduler Overview

Using the Pocket Scheduler Daily View

Using the Pocket Scheduler Monthly View

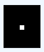
Pocket Scheduler Monthly View

The Monthly Schedule view displays a month-at-a-glance schedule for the month in which the current date falls. Display the Monthly Schedule view by tapping the Monthly icon on the Daily Schedule or Weekly Schedule views. Tap **Go to** and display the Go to Date screen to select a year, month, or day to view. The current date appears in parenthesis.

The Monthly Schedule screen contains the following elements:

- The month and year display in the upper left corner of the screen.
- Tap the **Left Arrow** to move to the previous month. Tap the **Right Arrow** to move to the next month.
- The monthly view looks like a calendar. Tap a date to go to the Daily Schedule view.
    - Conflicting events do not appear in the Monthly Schedule view.
    - The current date is highlighted.

- Use the Pocket Scheduler Display Options screen to set the following options:
  - *Timed* events display as marks within the date box according to their start and end times. Morning events appear in the upper right corner, afternoon events appear in the middle right, and evening events appear in the lower right corner.
  - *Untimed* events display as plus signs in the lower left corner of the date box.
  - Daily *repeating events* display as a dotted on the bottom of the date box. Only events that repeat every day, whether with or without an end date, display.
- Schedule view choices display at the bottom left side of the screen. Tap to choose a different view:

Icon	Title	Description
	**Daily**	The Daily Schedule view displays the selected date.
	Weekly	The current view.
	**Monthly**	The Monthly Schedule view displays the current month.

See Also:

Pocket Scheduler Overview

Using the Pocket Scheduler Daily View

Using the Pocket Scheduler Weekly View

Using Phone Lookup in Pocket Scheduler

Use the Phone Lookup option to add a name and address from the Pocket Contacts application to an event on the Daily Schedule. The Lookup screen functions like the Pocket Contacts Address List.

To add a name and phone number to an event:

1. Start the Pocket Scheduler application.
2. Display the Daily Schedule screen for the date you want to schedule the event.
3. Position the cursor at the end of the event description.
4. Tap the **Menu** screen button and select **Phone Lookup** from the **Options** menu.

   The Lookup screen displays.

5. Tap the **Acct** or **Cont** button to display the customer / vendor or the contacts address list.
6. Locate and tap the entity record whose telephone number you want to include in the event.

   The application copies the entity name, first telephone number, and contact name in the record into the event description.

See Also:

Accessing Pocket Scheduler Information

Pocket Contacts Overview

Pocket Scheduler Overview

Viewing the Pocket Contacts Address List

Adding Additional Information to Events in Pocket Scheduler

When you create events in the Eclipse application and upload them to the Palm device, you can view and edit these events using Pocket Scheduler. When you review the details of these events, the application displays the View Only Details screen. Define event types to use in Palm SFA with the Valid Scheduler Types control maintenance record.

To use the View Only Details screen:

1. Start the Pocket Scheduler application.
2. Display the Daily Schedule screen for a view-only event. This event has a view-only icon ( ).
3. Tap **Details** to display the Event Details screen.
4. Tap **Addl** to display the Additional Details screen.
5. Complete the following fields:

Field	Description
Location	Enter the location of the event or meeting.
Type	Select the type of event from the drop-down ( ).
Daily Desc	Whether to use the event description as the description to display in the Eclipse Message System during the time of the event.
Are you attending?	Whether you are attending the event.
Treat this event as?	You want to treat the event as **Busy** to avoid cross scheduling, or **Available** to allow cross scheduling. The default is Available.

6. Tap **OK** to save changes and return to the previous screen.

See Also:

Accessing Pocket Scheduler Information

Editing Event Details in Pocket Scheduler

Pocket Scheduler Overview

Reviewing Details of View Only Events in Pocket Scheduler

When you upload events from the Eclipse application and they were created / are owned by another user, these events appear in your schedule as view-only items. When you review the details of these events, the application displays the View Only Details screen.

To use the View Only Details screen:

1. Start the Pocket Scheduler application.
2. Display the Daily Schedule screen for a view-only event. This event has a view-only icon (■).
3. Tap **Details** to display the View Only Details screen.

   You can also tap the view-only icon to display the screen.
4. Review the following fields:

Field	Description
Time	Time of the event.
Date	Day of week and date of event.
Alarm	Alarm interval before the event, if set.
Entity	Name of entity, if attached.
Private	Whether event is private.
[Repeat]	Repeat interval, if set.
End on	Date event scheduled to end on, if set.

5. Tap a button if necessary:

Button	Tap to display...
Notes	attached notes. The title of the Notes screen is the name of the event. **Note:** You can also tap the **Notes** icon to go directly to the Notes screen.
Addl	the Additional Details screen. Although some items on this screen cannot be changed because you do not own the event, you can use this screen to acknowledge: • **Daily Desc** – Whether you want the meeting description to display in the Eclipse Message System for that time. • **Are you attending?** – Whether you are attending the meeting. • **Treat this event as?** – Whether you want to treat the event as Busy to avoid cross scheduling, or Available to allow cross scheduling.

6. Tap **OK** to save changes and return to the previous screen.

See Also:

Accessing Pocket Scheduler Information

Editing Event Details in Pocket Scheduler

Pocket Scheduler Overview

Pocket Job Queue Overview

Use the Pocket Job Queue application to download your job queue from the host system to your Palm device. You can edit the information and then synchronize the data to update the records on the host system.

With Pocket Job Queue, you can any of the following:

- Review trackers in your job queue
- Search for trackers in your job queue
- Enter new trackers on the Palm device
- Enter new appends to trackers
- Add and remove names on a tracker Forward List
- Close trackers for which you are the Final Action user

See Also:

Accessing Pocket Job Queue Information

Palm SFA Overview

Accessing Pocket Job Queue Information

Use the Pocket Job Queue application to download your job queue from the host system to your Palm device.

To launch the Pocket Job Queue application:

1. Tap the **Applications** screen button on the Palm device screen
2. Tap the **Job Queue** icon.
3. If the **Job Queue** icon does not display on the screen, tap the drop-down (▾) in the upper right corner of the Applications screen.
4. Select **All** from the list of categories. Use the vertical scroll bar to move through all available icons.

   The Job Queue screen displays.

See Also:

Pocket Job Queue Overview

Viewing Your Job Queue in Pocket Job Queue

Pocket Job Queue Setup Overview

Before you can use the Pocket Job Queue application, you must set the following:

- HotSync Preferences
- Pocket Job Queue Preferences

Synchronize your Palm device with the host system before using Pocket Job Queue to create trackers. This initial synchronization ensures that your Job Queue downloads to the Palm device.

See Also:

Palm SFA Setup Overview

Pocket Job Queue Overview

Setting Palm SFA HotSync Preferences

Setting Pocket Job Queue Preferences

Setting Palm SFA HotSync Preferences

Set Palm SFA HotSync preferences to determine how the application communicates with the host system when you synchronize data. Set HotSync preferences for each Palm SFA application:

- Pocket Contacts
- Pocket Scheduler
- Pocket Job Queue
- Pocket Order Entry

If you attempt to start an application prior to setting its HotSync preferences, the application displays the Sync Setup screen for the application you want to run.

> **Note:** As synchronizations can take a few minutes, depending on the amount of data needing to be transferred, you might want to synchronize after setting each application's HotSync preferences. As Palm SFA applications share data, you will notice that most preference fields populate after the first synchronization.

To set Palm SFA HotSync Preferences:

1. Start the Eclipse Palm application.
2. Tap the **Menu** screen button.
3. From the **Options** menu, select **HotSync Preferences**.
4. Complete the following fields:

Field	Description
Eclipse User ID / User ID	Your User ID. This is the same User ID you use to log onto the host system.
Password	Your password. This is the same password you use to log onto the host system. The first time you enter the password it is not masked. Thereafter, the password is hidden behind asterisks.
Host Name	The name of the host system running the Eclipse application. You can also use the IP address of the host name. **Note:** If you use multiple Eclipse companion products, verify this setting with your Palm SFA Support technician.
Serial # / Serial Num	This field is reserved for future implementation.

5. Select one or more of the following options:

Option	Description
Sync with Eclipse	Select this option to upload data from the Palm device to the host system whenever you synchronize your Palm device.
Auto Generate Paths	Palm SFA Support technicians use this option for troubleshooting. Use the default that displays. Clearing this option causes the **Set Paths** button to display. Use the **Set Paths** button to define the Sync Paths that Palm SFA uses to communicate with the host system.
Sync Acct Info	For Pocket Contacts, whether to also synchronize A/R information for customer and vendor accounts.
Sync Past ___ Day	For Pocket Scheduler, the amount of history to upload to the application. The default is 30 days.
Send Orders	For Pocket Order Entry (Pocket OE), select how you want to upload orders: • Every Time • This Time Only • Clear Sent Orders on Sync • Disable synchronization time out
Download Reorder Info	For Pocket OE, select how you want to download Reorder Pad information to the Palm device: • Every Time • This Time Only

6. Tap **OK** to save changes and return to the previous screen.
7. Synchronize your Palm device.

See Also:

Setting Up Palm SFA on the Palm Device

Setting Product File HotSync Preferences

Setting Pocket Job Queue Preferences

To set user preferences when using Pocket Job Queue, select **Preferences** from the **Options** menu.

To set Pocket Job Queue preferences:

1. Start the Pocket Job Queue application.
2. Tap the **Menu** screen button and select **Preferences** from the **Options** menu.
3. The Preferences screen contains the following fields:

Area	Field	Tap to...
Sort By	**Sort By**	select how to sort trackers in your Job Queue. Whenever you change the sort by, the application resorts your trackers before continuing. • **Status** – Sorts by the status assigned to the tracker from your user ID. This sort by is the default. • **Expected Date** – Sorts by the expected completion date for the tracker. • **Delivery Date** – Sorts by the required completion date on the tracker. • **Followup Date** – Sorts by the follow up date on the tracker. • **Tracker ID** – Sorts by the tracker number. Select the **Sort** menu item, found under the **Preference** menu to resort the job queue.
	Show modified column	display a column on the right side of the Trackers for [User ID] screen for an asterisk (*), indicating that you modified the tracker. This option is selected by default.
	Show icon column	display a column on the right side of the Trackers for [User ID] screen for the Views icon. This option is selected by default.
	Set default to last view	make the last tracker view (Append, View, Forward, Header, or Close) the default for viewing the next tracker.
Append Mode	**Append and forward list viewing**	make the Append view display the following: • space for entering the append comments. • the tracker Forward List. Selecting this option excludes the **Append and comment viewing** option. This option is selected by default.
	Append and comment viewing	make the Append view display the following: • the original tracker comment and all appends. • space for entering your append. Selecting this option excludes the **Append and forward list viewing** option.

4. Tap **OK** to save changes and return to the previous screen.

See Also:

Pocket Job Queue Overview

Pocket Job Queue Setup Overview

Finding Pocket Job Queue Version Number

You may need to find your version number of the Pocket Job Queue application. For example, if you need to upgrade the application, you want to verify what version you are currently running.

To locate the Pocket Scheduler's version number:

1. From the **Options** menu, select the **About Job Queue**.

   The version number displays. You can also select the **Info** menu item, found under the **Options** menu, off most screens.

See Also:

Pocket Job Queue Overview

Viewing Your Job Queue in Pocket Job Queue

When you first access the Pocket Job Queue application, the application sorts the trackers and displays them on the Job Queue screen. The Job Queue screen displays using the title "Trackers for [User ID]." You can select the order in which trackers sort in your Job Queue from the Preferences screen.

The Job Queue screen contains the following elements:

- Each tracker displays on its own row. If there are more trackers than can display, then **Up Arrow** and **Down Arrow** buttons display so you can scroll through the list.
- Trackers that are new to your queue or that have new appends since you last viewed them sort to the top of the queue and display in bold type. After you view a new or modified tracker, the application adds an asterisk (*) to the end of the line. The asterisks indicate that you made changes, but have not synchronized with the host system.

  Note: To undo changes made to the tracker, tap the asterisk. The Undo Changes screen prompts for confirmation.

- The first column displays your preferred Select By order.
- When items are sorted, you can do the following:

Item	Tap...
Status	the current status and change it by choosing a different status from the pop-up list.
Expected Date	the current date to display the Set Date screen and choose a new date.
Delivery Date	the current date to display the Set Date screen and choose a new date.
Followup Date	the current date to display the Set Date screen and choose a new date.
Tracker ID	Tap the Tracker ID to display the default tracker view screen.

- The first several characters of the first tracker append display. Bold type indicates that updates were made to the tracker or that the tracker is new.
- The information on a tracker is divided between different screens. Tap the **Views** icon to display a list of tracker screens for displaying and updating tracker information:

Screens	Function
Append	Add comments to the tracker.
View	Review comments on the tracker. This screen is view-only.
Forward	Send the tracker to other users or message groups.
Header	Review entity information associated with the tracker, the date the tracker was entered, the User ID of the person who entered the tracker, and additional information.
Close	Append a closing comment and select whether to close the tracker externally, internally, or both.

- Tap the drop-down (▾) to select the default view to display when you select a tracker description. The drop-down list functions like the Views icon, but applies to all trackers in your job queue.
- Tap the **New** button to create a tracker.
- The job queue also displays the number of trackers in your job queue.

See Also:

Appending to Trackers in Pocket Job Queue

Closing Trackers in Pocket Job Queue

Creating Trackers in Pocket Job Queue

Forwarding Trackers with Pocket Job Queue

Pocket Job Queue Overview

Reviewing Tracker Header Information in Pocket Job Queue

Viewing Tracker Comments in Pocket Job Queue

Purging All Trackers from Pocket Job Queue

Remove all job queue records on the Palm device using the **Purge All JobQs** menu item. This only purges data from the Palm device, not from the host system.

To purge all trackers:

1. Start the Pocket Job Queue application.
2. Tap the **Menu** screen button and select **Purge All JobQs** from the **Preferences** menu.
3. In the Purge Job Queues dialog box tap **OK** to confirm. Or to abort the operation tap **Cancel**.

See Also:

Pocket Job Queue Overview

Creating Trackers in Pocket Job Queue

You can create trackers and upload them to your Job Queue when you synchronize your Palm device with the host system.

To create a tracker in Palm Job Queue:

1. Start the Pocket Job Queue application.
2. Tap **New**.

   The application displays the New Tracker Entry screen.
3. Select the type of tracker you want to create:
   - **User** – Creates a tracker associated with the user ID.

     The application displays a list of user IDs. Tap a user ID to select it. You can also use the **Find** field to narrow your search.
   - **Entity** – Creates a tracker associated with a customer record.

     The application displays the Lookup screen. Tap a customer record to select it. You can also use the **Find** field to narrow your search.

   The application displays the Header view for the new tracker.

   Regardless of the number of trackers you create all new trackers use the Tracker ID "New Tracker" until you synchronize your Palm device with the host system. Once synchronized, the system assigns a tracker ID.
4. Edit the Header screen as needed.
5. Tap the drop-down (▾) in the upper right corner to change the current tracker view to Append. You can also tap the **Right Arrow** key in the lower left corner to move to the Header view.
6. Enter the first append for the tracker.

7. Tap the drop-down (▾) in the upper right corner to change the current tracker view to the Forward view. You can also tap the **Right Arrow** key in the lower left corner to move to the Forward view.
8. Edit the Forward List as needed.
9. Tap **Done** to save changes and return to the previous screen.

See Also:

Accessing Pocket Job Queue Information

Appending to Trackers in Pocket Job Queue

Forwarding Trackers with Pocket Job Queue

Pocket Job Queue Overview

Reviewing Tracker Header Information in Pocket Job Queue

Viewing Tracker Comments in Pocket Job Queue

Viewing Your Job Queue in Pocket Job Queue

Appending to Trackers in Pocket Job Queue

Use the tracker Append screen to add new comments to a tracker.

There are two variations to this screen, depending on your Pocket Job Queue preferences:

- **Append and forward list viewing** – Displays the Append screen with a space for entering the append comments and the tracker Forward List.
- **Append and comment viewing** – Displays the Append screen with the original tracker comments and a space for entering your append.

To append to a tracker:

1. Tap the drop-down (▾) in the upper right corner to change the current tracker view (Append, Forward, View, and Header).

   The current view displays as the name of the drop-down. You can also tap the **Left Arrow** and **Right Arrow** keys in the lower left corner to move between the different tracker views.

2. Select the append type:
   - **Internal Append** – Users of the host system, not customers or vendors can only view comments.
   - **External Append** – Customers and vendors, as well as users of the host system can view comments.
   - **Close Both** – If you denoted as Final Action on the tracker, close the tracker's internal and external statuses and append a comment.
   - **Close External** – If you denoted as Final Action on the tracker, close the tracker's external status, and append a comment. The tracker remains open with an internal status.
3. Tap **Done** to save changes and return to the previous screen.

See Also:

Closing Trackers in Pocket Job Queue

Forwarding Trackers with Pocket Job Queue

Pocket Job Queue Overview

Reviewing Tracker Header Information in Pocket Job Queue

Viewing Tracker Comments in Pocket Job Queue

Viewing Tracker Comments in Pocket Job Queue

Use the tracker View screen to review the original comment and all appends made to a tracker. Special characters display at the beginning of each append to indicate the append type:

Icon	Append Type	Description
* * *	Internal	Only users of the host system can view the appended messages. Customers and vendors cannot view appends.
! ! !	External	All users can view the appended messages, including customers and vendors.
< < <	Secure	Only the user who entered the comment and those User IDs included on the Secure Append list. Note: You can view your secure appends using Pocket Job Queue, but you cannot create secure appends.

Navigate through the tracker appends by using the vertical scroll bar on the right side of the screen. You can jump to the beginning of the tracker by selecting the **Go to Top** menu item, found under the **Options** menu of the View screen. Jump to the end of the tracker by selecting the **Go to Bottom** menu item.

To view tracker comments:

1. Tap the drop-down (▼) in the upper right corner to change the current tracker view (Append, Forward, View, and Header).

   The current view displays as the name of the drop-down. You can also tap the **Left Arrow** and **Right Arrow** keys in the lower left corner to move between the different tracker views.

2. Tap **Done** to save changes and return to the previous screen.

See Also:

Appending to Trackers in Pocket Job Queue

Pocket Job Queue Overview

Forwarding Trackers with Pocket Job Queue

Use the tracker Forward screen to add or remove user IDs or message groups to or from the tracker Followup List. When creating a new tracker, the application adds your user ID to the Forward List. Enter the user ID of any additional personnel or message group who must be informed with the information on the tracker.

The Forward screen contains the following elements:

Column	Tap to...
Forward	remove a user ID or message group from the Forward List. The application prompts for confirmation. **Note:** A user ID assigned to **Next Action** or **Final Action** on the tracker Header screen cannot be removed until you assign another user ID to **Next Action** or **Final Action**. Tap **Add** to add a user ID to the Forward List. The application displays a list of user IDs. Tap a user ID to select it. You can also use the **Find** field to narrow your search.
Status	change the status associated with a user ID. The application displays a list of available statuses: Tap a status to select it. You can also use the **Find** field to narrow your search. Tap **Cancel** to abort without making changes. **Note:** You can also select user-defined statuses that you created. When you create a tracker, the application assigns "NewItem" as the default status.
Alarm	select or change a future alarm date, or set the entry to No Date. Alarm dates are optional. If you set an alarm date for a tracker, on that date, the tracker displays at the top of your Job Queue with the status of ALARM. When choosing a date, the application displays the Select Date screen. Use this screen to select the year, month, and day for the event. Tap **Today** to go to the current date.
Flw Up	select or change a future follow up date, or set the entry to No Date. Setting a future follow up date for your user ID removes the tracker from your job queue until that date, unless another user updates the tracker. Use follow-up dates to help manage the items in your job queue. When choosing a date, the application displays the Select Date screen. Use this screen to select the year, month, and day for the event. Tap **Today** to go to the current date.

To display the names on the forward list:

1. Tap the drop-down (▾) in the upper right corner to change the current tracker view (Append, Forward, View, and Header).

   The current view displays as the name of the drop-down. You can also tap the **Left Arrow** and **Right Arrow** keys in the lower left corner to move between the different tracker views.

2. Tap the **Up Arrow** or **Down Arrow** to move through the list of user IDs.
3. Tap **Done** to save changes and return to the previous screen.

See Also:

Appending to Trackers in Pocket Job Queue

Closing Trackers in Pocket Job Queue

Pocket Job Queue Overview

Reviewing Tracker Header Information in Pocket Job Queue

Viewing Your Job Queue in Pocket Job Queue

Viewing Tracker Comments in Pocket Job Queue

Reviewing Tracker Header Information in Pocket Job Queue

Use the tracker Header screen to review additional information about a tracker. The Header screen contains the following elements:

Field	Description
Entity	The entity -- customer, vendor, or contact -- associated with the tracker. This field is view-only.
Contact	The contact associated with the tracker. This field is view-only.
Entered On	The date the tracker was created. This field is view-only.
Entered By	The User ID of the person who created the tracker. This field is view-only.
Next Action	Tap to select the User ID of the person who next must take action on the tracker. The application displays a list of User IDs. Tap a user ID to select it. You can also use the **Find** field to narrow your search. By default, this User ID is added to the Forward List. **Note:** A user ID assigned as **Next Action** cannot be removed until you assign another User ID to **Next Action**.
Final Action	Tap to select the User ID of the person responsible for taking final action on the tracker, or for closing the tracker. The application displays a list of User IDs. Tap a user ID to select it. You can also use the **Find** field to narrow your search. **Note:** A user ID assigned to **Final Action** cannot be removed until you assign another User ID to **Final Action**.
Expected Date	The date when the tracker is expected to be completed. Tap to select or change the date, or set the entry to No Date. When choosing a date, the application displays the Select Date screen. Use this screen to select the year, month, and day for the event. Tap **Today** to go to the current date.
Delivery Date	The date when the tracker is required to be completed. Tap to select or change the date, or set the entry to No Date. When choosing a date, the application displays the Select Date screen. Use this screen to select the year, month, and day for the event. Tap **Today** to go to the current date.

▶To review header information:

1. Tap the drop-down (▾) in the upper right corner to change the current tracker view (Append, Forward, View, and Header).

The current view displays as the name of the drop-down. You can also tap the **Left Arrow** and **Right Arrow** keys in the lower left corner to move between the different tracker views.

2. Tap **Done** to save changes and return to the previous screen.

See Also:

Appending to Trackers in Pocket Job Queue

Forwarding Trackers with Pocket Job Queue

Pocket Job Queue Overview

Viewing Tracker Comments in Pocket Job Queue

Viewing Your Job Queue in Pocket Job Queue

Closing Trackers in Pocket Job Queue

If your user ID is in the **Final Action** field, you can close the tracker, either externally, or both externally and internally.

Closing a tracker externally while keeping it open internally allows you to complete all customer-facing processes while allowing you time to complete your internal processes. For example, you close a tracker externally because all customer-facing work is complete and so far as the customer is concerned, the issue on the tracker is resolved.

Closing a tracker both externally and internally means that there is no more work needing to be completed on the tracker. This value is the default when closing a tracker.

There are two ways to initiate the closing action for a tracker:

- By using the Views icon from the Trackers for [user ID] screen.
- By selecting a tracker and displaying the Append view.

Closing the tracker removes your name from the Forward List. The tracker remains in your queue, without a status, until you synchronize the Palm device with the host system.

Tap the asterisk at the end of a modified tracker to display the Undo Changes screen. You can discard any changes to the tracker, including whether you closed it, prior to uploading the data to the host system.

To close a tracker using the Views icon:

1. Start the Pocket Job Queue application.
2. Tap the Views icon of the tracker you want to close.
3. Select **Close**.

   The application displays the Closing Comments from [Tracker ID] screen.
4. Tap the drop-down (▾) and select whether to close the tracker both internally and externally, or just externally.
5. Enter a closing comment. This comment is required.
6. Tap **Done** to return to the previous screen.

To close a tracker using the Views icon:

1. Start the Pocket Job Queue application.
2. Select the tracker you want to close.
3. Tap the drop-down (▾) in the upper right corner to change the current tracker view to Append. You can also tap the **Right Arrow** key in the lower left corner to move to the Header view.
4. Tap the drop-down (▾) and select whether to close the tracker both internally and externally, or just externally.

5. Enter a closing comment. This comment is required.
6. Tap **Done** to return to the previous screen.

See Also:

Appending to Trackers in Pocket Job Queue

Creating Trackers in Pocket Job Queue

Reviewing Tracker Header Information in Pocket Job Queue

Pocket Order Entry Overview

Use the Pocket Order Entry (Pocket OE) application to create sales orders on a Palm device when you are away from the host system.

With Pocket OE you can do the following:

- Create and edit sales orders.
- Review line item details, including pricing, and offer discounts.

  Note: Pocket OE is not a real-time application. Pricing information is only current as of the last Product File update.

- Review order header information.
- Create non-stock products on-the-fly.
- Download a user-defined Product File to create orders efficiently.
- Use the Palm SFA contact and account information transparently.

  Note: Pocket OE is not a real-time application. Customer Reorder Pad information is only as current as of the last synchronization.

After creating orders on the Palm device, upload them to the host system. The host system creates an actual sales order using the latest pricing information for the customer.

All sales orders created from Pocket OE display in the Remote Order Entry Queue, where an authorized use can review and edit them.

See Also:

Accessing Pocket Order Entry

Palm SFA Overview

Pocket Order Entry Setup Overview

Accessing Pocket Order Entry

Use the Pocket Order Entry (Pocket OE) application to create sales orders on a Palm device when you are away from the host system.

To launch the Pocket OE application:

1. Tap the **Applications** screen button on the Palm device screen.
2. Tap the **Pocket OE** icon.
3. If the **Pocket OE** icon does not display on the screen, tap the drop-down (▾) in the upper right corner of the Applications screen and select **All** from the list of categories. Use the vertical scroll bar to move through all available icons.

   The main Pocket Ordering screen displays. From Pocket OE, you can do the following:

   - Create a new order
   - Review and edit orders created on the Palm device
   - Edit the Pocket OE customer list
   - Remove orders uploaded to the host system

See Also:

Pocket Order Entry Overview

Uploading Orders to the Host with Pocket Order Entry

After creating or editing orders using Pocket Order Entry (Pocket OE), perform a HotSync to upload the transactions to the host system. If the host detects discrepancies in ship dates, pricing, nonstock items, and so forth on an order, it messages the Palm Administrator.

After uploading orders, the main Pocket Ordering screen displays the orders created on the Palm device. The application puts a check mark in the **Sent** check box () for orders uploaded to the host system.

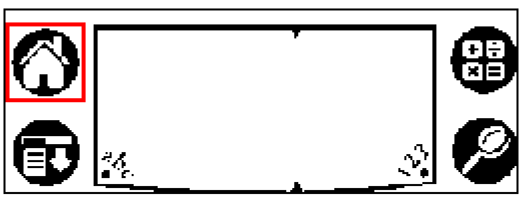
> **Note:** The **Clear Sent Orders on Sync** option removes orders from the main Pocket Ordering screen after uploading them to the host.

Once you upload an order to the host system, you must take care if you change the Sent status, edit, and re-send the order.

You can remove uploaded orders from the Palm device if you prefer.

To upload orders created with Pocket OE to the host system:

1. Place the Palm device in its cradle or connect it to its synchronization cable.
2. Tap the **Applications** screen button on the Palm device screen to display the main Applications screen.



3. Tap the drop-down () in the upper right corner of the screen and select **All**.
4. Locate and tap the HotSync icon.

   The HotSync application displays.
5. Tap the **HotSync** button.

   A HotSync Progress dialog box displays on your computer during the synchronization. Click **Cancel** to stop the HotSync.
6. Remove the Palm device from the cradle or cable when the process is complete.

Removing Orders Uploaded from Pocket Order Entry

If you always want to clear orders from the main Pocket Ordering screen after uploading them to the host, set the **Clear Sent Orders on Sync** option.

> **Note:** Clearing uploaded orders from the Palm device does not remove them from the host system.

Remove uploaded orders by doing one of the following:

- Remove all uploaded orders
- Delete an individual uploaded order

To remove all upload orders from the main Pocket Ordering screen:

1. Start the Pocket OE application.
2. Tap the **Menu** screen button and select **Orders** > **Remove Sent Orders**.

   The system prompts for confirmation.
3. Tap **OK**.

   The application deletes all Sent orders from the Palm device and returns you to the main Pocket Ordering screen.

To delete an individual uploaded order from the Palm device:

1. Start the Pocket OE application.
2. Tap a Sent order. That is, an order with a check mark in the **Sent** check box (☑).

   The application displays the Order Already Sent screen.
3. Tap **OK**.
4. Tap the **Menu** screen button and select **Orders** > **Delete Order**.

   The system prompts for confirmation.
5. Tap **OK**.

   The application deletes the Sent order from the Palm device and returns you to the main Pocket Ordering screen.

Changing the Sent Status of Orders Created in Pocket Order Entry

Tapping a Sent order displays the current synchronization information about the order. If you change the Sent status, the system warns of possible consequences.

See Also:

Pocket Order Entry Overview

Pocket Order Entry Setup Overview

Use the Pocket Order Entry (Pocket OE) application to create sales orders on a Palm device when you are away from the host system.

> **Note:** Synchronize your Palm device with the host system before using Pocket OE to create events. This initial synchronization ensures that the Product File and Reorder Pad information downloads.

Before you can use the Pocket Order Entry (Pocket OE), you must do the following:

- Set HotSync Preferences
- Set Pocket Order Entry Preferences
- Download the Product File to the Palm Device
- Set Product File HotSync Preferences
- Rebuild the Product File Index on the Palm Device

See Also:

Palm SFA Setup Overview

Pocket Order Entry Overview

Setting Palm SFA HotSync Preferences

Set Palm SFA HotSync preferences to determine how the application communicates with the host system when you synchronize data. Set HotSync preferences for each Palm SFA application:

- Pocket Contacts
- Pocket Scheduler
- Pocket Job Queue
- Pocket Order Entry

If you attempt to start an application prior to setting its HotSync preferences, the application displays the Sync Setup screen for the application you want to run.

> **Note:** As synchronizations can take a few minutes, depending on the amount of data needing to be transferred, you might want to synchronize after setting each application's HotSync preferences. As Palm SFA applications share data, you will notice that most preference fields populate after the first synchronization.

To set Palm SFA HotSync Preferences:

1. Start the Eclipse Palm application.
2. Tap the **Menu** screen button.
3. From the **Options** menu, select **HotSync Preferences**.
4. Complete the following fields:

Field	Description
Eclipse User ID / User ID	Your User ID. This is the same User ID you use to log onto the host system.
Password	Your password. This is the same password you use to log onto the host system. The first time you enter the password it is not masked. Thereafter, the password is hidden behind asterisks.
Host Name	The name of the host system running the Eclipse application. You can also use the IP address of the host name. **Note:** If you use multiple Eclipse companion products, verify this setting with your Palm SFA Support technician.
Serial # / Serial Num	This field is reserved for future implementation.

5. Select one or more of the following options:

Option	Description
Sync with Eclipse	Select this option to upload data from the Palm device to the host system whenever you synchronize your Palm device.
Auto Generate Paths	Palm SFA Support technicians use this option for troubleshooting. Use the default that displays. Clearing this option causes the **Set Paths** button to display. Use the **Set Paths** button to define the Sync Paths that Palm SFA uses to communicate with the host system.
Sync Acct Info	For Pocket Contacts, whether to also synchronize A/R information for customer and vendor accounts.
Sync Past ___ Day	For Pocket Scheduler, the amount of history to upload to the application. The default is 30 days.
Send Orders	For Pocket Order Entry (Pocket OE), select how you want to upload orders: • Every Time • This Time Only • Clear Sent Orders on Sync • Disable synchronization time out
Download Reorder Info	For Pocket OE, select how you want to download Reorder Pad information to the Palm device: • Every Time • This Time Only

6. Tap **OK** to save changes and return to the previous screen.
7. Synchronize your Palm device.

See Also:

Setting Up Palm SFA on the Palm Device

Setting Product File HotSync Preferences

Setting Pocket Order Entry Preferences

Set Pocket Order Entry (Pocket OE) preferences for displaying Reorder Pad information to the Palm device, and for attaching a review flag to orders uploaded to the host system.

To set Pocket OE Preferences:

1. Start the Pocket OE application.
2. Tap the **Menu** screen button and select **Preferences** from the **Configure** menu.
3. Select from the following Reorder Pad options:

Option	Description
Reorder Pad Quantities	Which order quantities to display on the Reorder Pad screen: • **Suggested** – Displays calculated order quantities, based on the customer's past purchasing habits of the products. • **Last** – Displays the order quantities of the products from the customer's most recent order.
Default View is Reorder Pad	Whether to display the Reorder Pad screen when starting Pocket OE instead of the Item Entry screen. Select this option when you create most of your orders using Reorder Pad.
Use Quantity Break Pricing	Whether to use quantity break pricing for line items. **Note:** For quantity break pricing to function, define **Basis 1** of the Palm Product File Price Basis Fields To Be Downloaded control maintenance record as the base sell price and **Basis 2** as the quantity break price. When quantity break pricing is turned off, the line item price displayed on the Palm device is always based on **Basis 1**, regardless of the order quantity. When quantity break pricing is turned on and the order quantity is: • less than the package quantity displayed on the Product Details screen, the line item price is based on **Basis 1**. • equal to or greater than the package quantity displayed on the Product Details screen, the line item price is based on **Basis 2**. **Note:** Pricing is approximate as the Palm device uses static pricing data, unlike the host system which uses dynamic, real-time pricing data. When the order is uploaded to the host, the host applies the appropriate pricing rules to the order.
Auto Check Review Flag	The condition when Pocket OE selects the **For Review** option on the Order Header view for new orders: • **For All New Orders** – Whenever a new order is created with Pocket OE. • **On Order Level Comments** – When Shipping Instructions or Internal Comments are attached to the Order Header. • **On Line Level Comments** – When comments are attached to a line item. When orders are uploaded to the host, those flagged for review appear in the Remote Order Entry Review Queue.

4. Tap **OK** to save changes and return to the previous screen.
5. Synchronize your Palm device.

See Also:

Pocket Contacts Overview

Pocket Job Queue Overview

Pocket Scheduler Overview

Pocket Order Entry Overview

Setting Product File HotSync Preferences

Downloading the Product File to the Palm Device

You must download a Palm-readable Product File (ProdLib.pdb) when you first install Pocket Order Entry (Pocket OE) on your Palm device. Failure to do this prevents you from being able to select products on the Item Entry screen: the **Search** button does not display.

The host system creates and updates ProdLib.pdb. This file contains a subset of the product information, including basic pricing data, that is found on the host system.

> **Note:** Customer Reorder Pad information, which includes customer-specific pricing data, is synchronized with Pocket Order Entry data.

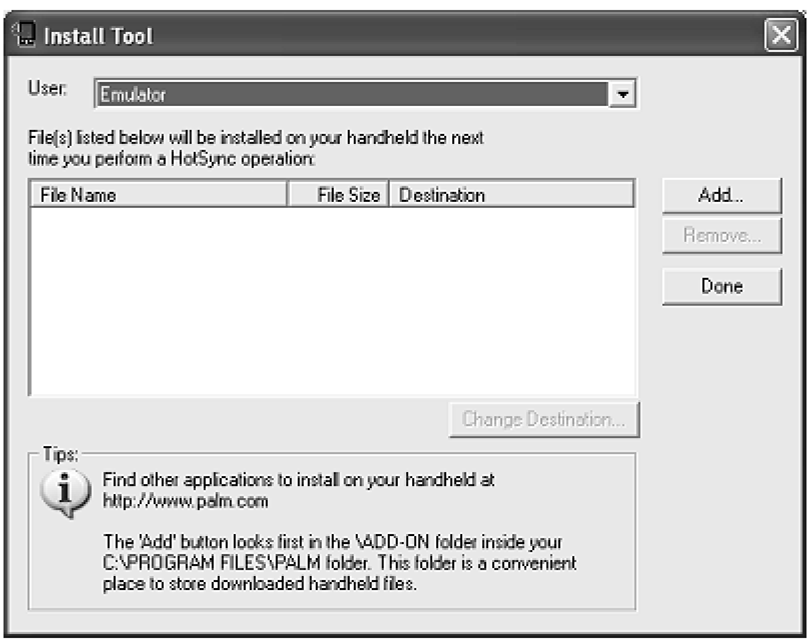
After downloading the ProdLib.pdb file, you must build the product index on the Palm device. Building the product index, or "indexing the Product File," enables you to search for products on the Palm device the same way you search for products on the host system. Each time you download ProdLib.pdb or change how you index file, Pocket OE prompts you to re-build the product index before continuing.

The combined process of downloading and indexing can take several minutes to several hours, depending on the size of the original Product File on the host system.

You can set Product File HotSync preferences to choose whether to download the entire Product File, or only updates made to the Product File, when you subsequently synchronize your Palm device. The latter improves the speed of the synchronization.

To download the Product File to the Palm device:

1. Launch the Palm Install Tool to display the Install Tool dialog box.



From the Palm Desktop application, click the **Install** button to launch the Install Tool.

2. In the **User** field, select the name of the Palm device to receive the Product File.
3. Click **Add** to display an Open dialog box.
4. In the **Look In** field, navigate to the location of the ProdLib.pdb file, click the file name to select it, and then click **Open**.

   The ProdLib.pdb file displays in the Install Tool dialog box.
5. Click **Done**.

   If the Install Tool displays a confirmation box, click **OK** to dismiss.
6. Synchronize your Palm device.
7. Set the Product File HotSync preferences.

See Also:

Performing a HotSync with a Palm Device

Pocket Order Entry Overview

Setting Product File HotSync Preferences

Setting Up HotSync Options for Palm Devices

Setting Product File HotSync Preferences

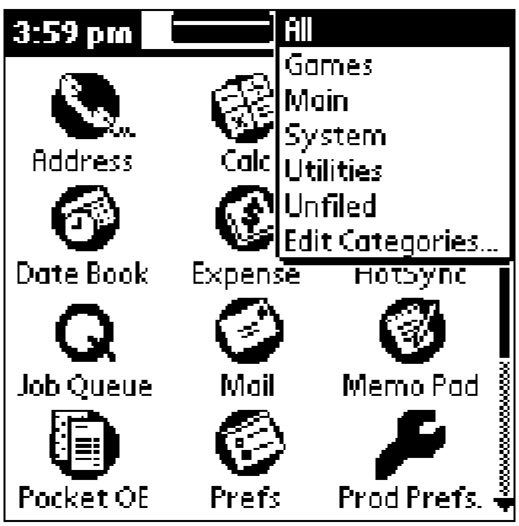
Set HotSync preferences to determine how the application communicates with the host system when you download Product File data, and how to index products on the Palm device.

> **Note:** Synchronization of the Product File can take several minutes to several hours, depending on the size of the original Product File on the host system.

To set the HotSync Preferences for the Product File:

1. From the main Applications screen, tap the **Prod Prefs** icon to display the Product File Sync Setup screen.

If the icon does not display on the Applications screen, tap the drop-down arrow in the upper right corner of the screen and select **All** from the list of categories. Use the vertical scroll bar to move through all available icons.



You can create custom categories on the Palm device to hold all your Palm SFA icons.

2. On the Product File Sync Setup screen, complete the following fields:

Field	Description
Eclipse User ID	Your User ID. This is the same User ID you use to log onto the host system.
Host Name	The name of the host system running the Eclipse application. You can also use the IP address of the host name. **Note:** If you use multiple Eclipse companion products, verify this setting with your Palm SFA Support technician.

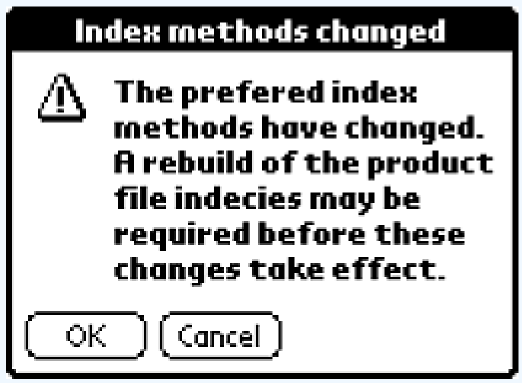
3. Select one or more options:

Option	Description
Download product file	Select how much of the Product File to download with each synchronization: • **Full** – Downloads the entire Product File. Select this for the initial synchronization. • **Update** – Downloads only updates made to the Product File since the last synchronization. Select this option if you synchronize your Palm device several times each day.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Index methods</td><td>Select how to index the Product File on the Palm device to facilitate searching for products.

Index Description – Select to index products by their descriptions.
Index Keywords – Select to index products by the additional keywords defined in the product record.
Index UPCs – Select to index products by their Universal Product Codes (UPCs). Select this option when using bar-code scanner enabled Palm devices to allow users to scan UPCs into a product field.

If you change any of these options, the application warns you to re-build the index before launching Pocket Order Entry (Pocket OE).



</td></tr>
<tr><td>Auto Generate Paths</td><td>Palm SFA Support technicians use this option for troubleshooting. Use the default setting.
Clearing this option causes the Set Paths button to appear. Use the Set Paths button to define the Sync Paths that Palm SFA uses to communicate with the host system.</td></tr>
</table>

4. Tap **OK** to save changes and return to the previous screen.
5. Synchronize your Palm device.

See Also:

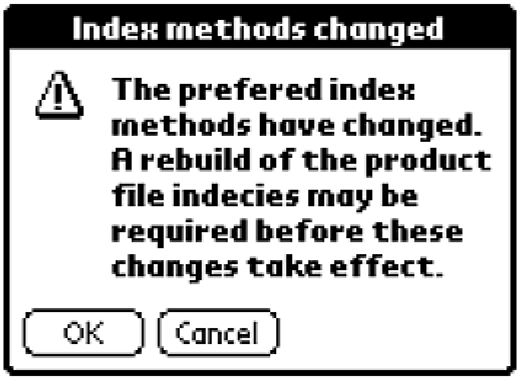
Downloading the Product File to the Palm Device

Pocket Order Entry Overview

Rebuilding the Product File Index on the Palm Device

Rebuilding the Product File Index on the Palm Device

Changing HotSync options on the Product File Sync Setup screen affects how you are able to search for products using the Pocket Order Entry (Pocket OE) application on the Palm device. If you update the Product File or change how products are indexed, synchronize with the host system, and then attempt to run Pocket OE, the application warns you to re-build the index first.



Note: If you do not re-build the index, you cannot search for products that ha have been updated or use the updated index methods.

The combined process of downloading and indexing can take several minutes to several hours, depending on the size of the original Product File on the host system.

To re-build the Product File index on the Palm Device:

1. Set Product File HotSync preferences.
2. Synchronize your Palm device.
3. Start Pocket OE.
   - If the application detects that the Product File index has changed since the last time Pocket OE ran, it prompts you to rebuild the index.

   - If the Product File index has not changed, Pocket OE starts and displays the main Pocket Ordering screen.

4. Tap **Rebuild Index** to begin.

   The application displays a progress box during the re-build process.

5. When complete, Pocket OE displays the main Pocket Ordering screen.

See Also:

Accessing Pocket Order Entry

Downloading the Product File to the Palm Device

Pocket Order Entry Overview

Setting Product File HotSync Preferences

Finding Pocket Order Entry Version Number

You may need to find your version number of the Pocket Order Entry (OE) application. For example, if you need to upgrade the application, you want to verify what version you are currently running.

To locate the Pocket OE's version number:

1. From the **About** menu, select the **About Pocket Ordering**.

   The version number displays. The **About** menu item is found off most screens.

See Also:

Pocket Order Entry Overview

Adding Customers to the Pocket Order Entry Customer List

Create a customer list of your main customers for use with Pocket Order Entry (Pocket OE). Customers display in the list alphabetically. This customer list displays whenever you create a new order.

You can add customers to this list by:

- Using the Customer ID stored in Customer Maintenance on the host system.
- Selecting customers from Pocket Contacts.

  Note: You can also clear customers from the Pocket OE customer list by tapping the **Menu** screen button and selecting **Options > Clear Current Customers**.

To add customers to the Pocket OE customer list using Customer IDs:

1. Start the Pocket OE application.
2. Tap the **Menu** screen button and select **Edit Customers** from the **Configure** menu to display the Edit Customers List screen.

   You can also display the Edit Customer screen by tapping the **Edit** icon ()on the customer record.
3. From the **Edit Customer List** selections, tap **Add Customer** to display the New Customer screen.

4. In the **Eclipse ID** field, enter the Customer ID from Customer Maintenance on the host system.

   Note: This function only allows you to add existing customer records from the host system to the Pocket OE customer list.
5. In the **Customer** field, enter a customer name to associate with the Customer ID.

   Note: The customer name applies to the Pocket OE customer list only. It does not need to match the customer name stored on the host system.
6. Tap one of the following:

   - **Add** – Allows you to continue entering records. All records you entered display when you tap **Done**.

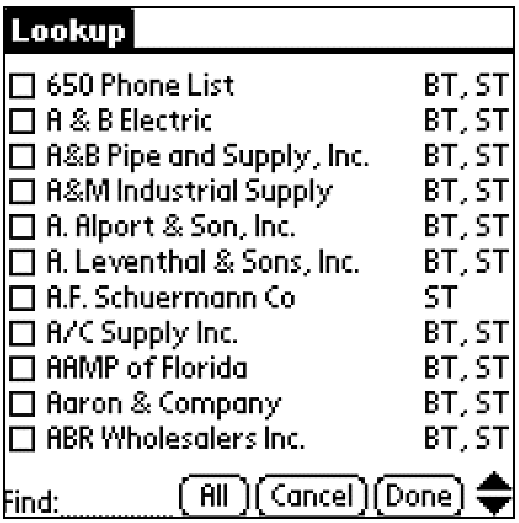
- **Done** – Returns you to the previous screen.

7. Tap **Done** to return to the previous screen.

To add customers to the Pocket OE customer list by selecting from Pocket Contacts:

1. Start the Pocket OE application.
2. Tap the **Menu** screen button and select **Edit Customers** from the **Configure** menu to display the Edit Customers List screen.

   You can also display the Edit Customer screen by tapping the **Edit** icon ( )on the customer record.
3. From the **Edit Customer List** selections, tap **Lookup** to display the Lookup screen.



The Lookup screen functions like the Pocket Contacts Address List.

4. Tap a record to select it. The application places a check mark in the select box. Tap the record again to clear the check mark.

You can also do the following:

- Use the **Find** field to narrow your search.
- Tap **All** to select all records.

5. Continue selecting records until you have built your Pocket OE customer list.
6. Tap one of the following:
   - **Cancel** – Discards all selections and returns you to the previous screen.
   - **Done** – Adds all selections to the customer list and returns you to the previous screen.
7. Tap **Done** to return to the previous screen.

See Also:

Creating Orders with Pocket Order Entry

Editing Customer Records in the Pocket OE Customer List

Pocket Order Entry Overview

Editing Customer Records in the Pocket OE Customer List

You can rename or remove customer records from your Pocket OE customer list. Renaming or removing a customer from the Pocket OE customer list does not affect the Pocket Contacts application. Nor does it affect the records stored on the host system.

> **Note:** You can also clear customers from the Pocket OE customer list by tapping the **Menu** screen button and selecting **Options > Clear Current Customers**.

To edit customer names in the Pocket OE customer list:

1. Start the Pocket OE application.
2. Tap the **Menu** screen button and select **Edit Customers** from the **Configure** menu to display the Edit Customer List screen.

   You can also display the Edit Customer screen by tapping the **Edit** icon ()on the customer record.
3. From the **Edit Customer List** selections, tap a record to display the Edit Customer screen.

4. In the **Customer** field, make changes to the customer name.
5. Tap **Done**.

   The application prompts you to confirm renaming the customer.

   Note: This renames the record in the Pocket OE customer list, not in Pocket Contacts or on the host system.
6. Tap **OK** to rename the record and return to the previous screen.
7. Tap **Done** when you are finished deleting records.

To remove customers from the Pocket OE customer list:

1. Start the Pocket OE application.
2. Tap the **Menu** screen button and select **Edit Customers** from the **Configure** menu to display the Edit Customer List screen.

You can also display the Edit Customer screen by tapping the **Edit** icon ( )on the customer record.

3. From the **Edit Customer List** selections, tap a record to display the Edit Customer screen.
4. Tap **Delete**.

   The application prompts you to confirm removing the customer.

   Note: This removes the record from the Pocket OE customer list, not from Pocket Contacts or from the host system.

5. Tap **OK** to remove the record and return to the previous screen.
6. Tap **Done** when you are finished deleting records.

See Also:

Adding Customers to the Pocket Order Entry Customer List

Creating Orders with Pocket Order Entry

Pocket Order Entry Overview

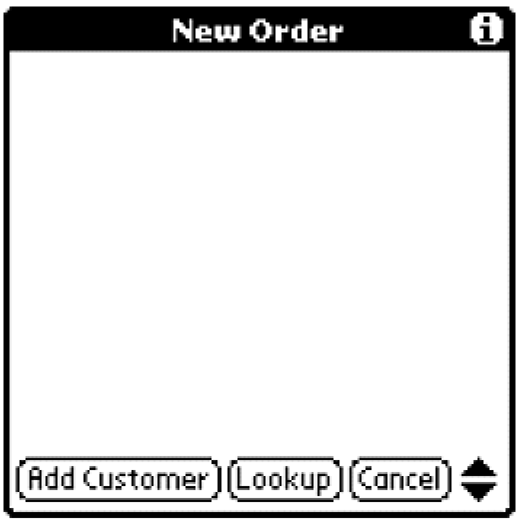
Creating Orders with Pocket Order Entry

Create orders on the Palm device using the main Pocket Order Entry screen. Just like order entry on the host system, select the customer first and then enter products and quantities.

Use additional Pocket OE screens to make changes or add information to the order.

To create an order with Pocket Order Entry:

1. Start the Pocket OE application.
2. From the main Pocket Ordering screen, tap **New Order** to display the New Order screen.



If you have created a Pocket OE customer list, the New Order screen lists those customers.

Otherwise, add customers to the Pocket OE customer list by tapping one of the following:

- **Add Customer –** Adds customers using Customer IDs from Customer Maintenance on the host system.
- **Lookup –** Adds customers by selecting them from Pocket Contacts application.

3. Tap a customer name to display the Item Entry screen.

Use the Item Entry screen to the following:

- Search for products
- Enter items and quantities
- Review pricing and other line item information

Note: If you changed Pocket OE preferences to display the Reorder Pad when creating new orders, use the Reorder Pad to select products and quantities.

4. Change to the following:
   - Order View to review and edit items and quantities on the order.
   - Order Header view to enter shipping information.
   - Reorder Pad view to select products and quantities using the Reorder Pad.
5. Tap **Done** to return to the main Pocket Ordering screen.

   You can edit transactions by selecting them from the main Pocket Ordering screen.

More Options for Creating Orders with Pocket Order Entry

The following are additional options you might use when creating orders using Pocket OE's New Order screen:

To...	Tap the Menu screen button and select...
use the Palm device's editing menu	**Edit**
clear current customers	**Options > Clear Current Customers** The application prompts for confirmation.

See Also:

Pocket Order Entry Overview

Uploading Orders to the Host with Pocket Order Entry

Moving Orders in Pocket Order Entry

You can move an order created in Pocket Order Entry (Pocket OE) from the current customer to another customer. This does not copy the order, but actually moves the order to a different customer.

For example, you begin a bid under a generic customer, "Bid Customer." When the customer decides to go forward with the bid, you can move the bid from Bid Customer to the actual customer or ship-to account. Next, you create an order for a customer. The customer later requests that the order be continued using a different ship-to account. Finally, you begin an order only to find that you've entered it under the wrong customer or ship-to.

To move an order in Pocket OE:

1. Start the Pocket OE application.
2. From the main Pocket Ordering screen, select an order to edit.

   If you attempt to edit an order that was uploaded to the host system, the application reminds you to clear the **Sent** select box before uploading it to the host.

   The order displays in the Order View screen.
3. Tap the **Menu** screen button and select **Move Order** from the **Orders** menu to display the New Company for Order screen.

If you have created a Pocket OE customer list, the New Company for Order screen lists those customers.

You can add customers by tapping:

- **Add Customer –** Adds customers using Customer IDs from Customer Maintenance on the host system.
- **Lookup –** Adds customers by selecting them from Pocket Contacts application.

4. Tap a customer name to move the order to that customer.
5. Continue editing the order or tap **Done** to return to the main Pocket Ordering screen.

See Also:

Adding Customers to the Pocket Order Entry Customer List

Editing Orders with Pocket Order Entry

Pocket Order Entry Overview

Uploading Orders to the Host with Pocket Order Entry

Selecting Pocket Order Entry Views

Pocket Order Entry (Pocket OE) offers the following screens to create or edit orders:

- **Item Entry –** Search for items, select items and quantities, view line item information, offer discounts, or add line item comments.
- **Order View –** Review and edit items and quantities on an order, and view the approximate total.
- **Order Header –** Enter order header information such as purchase order number, release order number, shipping information, and discounts applied at the order level. You can also add shipping instructions and a custom address.
- **Reorder Pad –** If a customer has Reorder Pad information, select products and quantities by last quantity ordered, or by a calculated suggested quantity. You can change Pocket OE preferences to display the Reorder Pad to select items and quantities when creating or editing orders.

To select a Pocket Order Entry (Pocket OE) view:

1. Start the Pocket OE application.
2. From the main Pocket Ordering screen, edit an order or create an order.
   - The Item Entry screen displays when creating orders, unless you changed Pocket OE preferences to display the Reorder Pad.
   - The Order View screen displays when editing orders, unless you changed Pocket OE preferences to display the Reorder Pad.
3. Tap the drop-down (▾) in the upper right corner of the screen and select a view to display:
   - Item Entry
   - Order View
   - Order Header
   - Reorder Pad

   You can also tap the right or left **View** arrows (◀ View ▶) in the bottom left corner of the screen. Tap the right button to cycle forward through the list of views. Tap the left button to cycle backwards through the list.
4. Tap **Done** from a Pocket OE view to return to the main Pocket Ordering screen.

See Also:

Creating Orders with Pocket Order Entry

Editing Orders with Pocket Order Entry

Editing Orders with Pocket Order Entry

After creating an order with Pocket Order Entry (Pocket OE) 's Order View or Reorder Pad, you can edit it on the Palm device from the main Pocket Ordering screen.

The main Pocket Ordering screen displays the orders you create on the Palm device, arranged by Customer ID. When more than one order exists for a single customer, the application numbers them by create date and time. That is, the first order created for the customer is "1" and the second is "2" and so forth. When there are more orders than can display on one screen, a vertical scroll bar displays on the right side of the screen.

You can safely edit any order that you have not uploaded to the host system. These orders do not have a check mark in the **Sent** check box (☐). If you attempt to edit an uploaded order, the application reminds you to clear the **Sent** check box (☑) before you can upload it to the host. If you change the Sent status, the system warns of possible consequences.

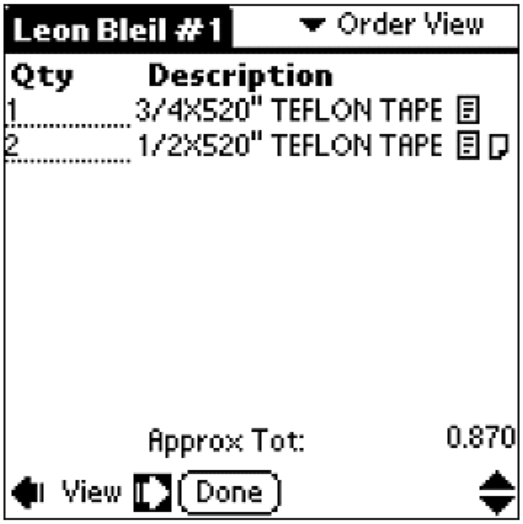
If you want to remove orders from the main Pocketing Ordering screen after uploading them to the host system, set the **Send Orders** option to "Clear Sent Orders on Sync" on the Pocket Order Sync Setup screen.

To edit an order with Pocket Order Entry:

1. Start the Pocket OE application.
2. From the main Pocket Ordering screen, select an order to edit.

Note: If you attempt to edit an order that was uploaded to the host system, the application reminds you to clear the **Sent** select box before uploading it to the host.

The Order View displays the quantities, line items, and the approximate total cost of the order. The order total is approximate as the Palm device uses static pricing data, unlike the host system which uses dynamic, real-time pricing data. For more information, see Reviewing Line Item Details in Pocket Order Entry.



Note: If you changed Pocket OE preferences to display the Reorder Pad view when creating new orders, use the Reorder Pad screen to select products and quantities.

3. Tap a line item to select it. For a line item, you can do the following:
   - change the order quantity by entering a new value in the **Qty** field.
   - review pricing and other details by tapping the line item detail icon ().
   - review a line item comment by tapping the comment icon ().
4. Change to the following views, as needed:
   - Use Item Entry view to do the following:
     - Search for products
     - Enter items and quantities
     - Review pricing and other line item information
   - Use Order Header view to enter shipping information.
   - Use Reorder Pad view to add items and quantities using the Reorder Pad.
5. Tap **Done** to return to the main Pocket Ordering screen.

More Options for Editing Orders in Pocket Order Entry

The following are additional options you might use when editing orders using Pocket OE's Order View:

To...	Tap the Menu screen button and select...
move the order to another customer	**Orders** > **Move Order** The New Company for Order screen displays.
delete the order	**Orders** > **Delete Order** The application prompts for confirmation.

To...	Tap the Menu screen button and select...
set Pocket Order Entry preferences	**Orders > Preferences** The Pocket Ordering Prefs screen displays.
add a new line item	**Line Item > New** The Item Entry screen displays.
delete a line item from the order	**Line Item > Delete** The application prompts for confirmation.
add a line item comment	**Line Item > Add Line Item Comment** The Line Item Comment screen displays.
delete a comment from a line item	**Line Item > Delete Comment** The application prompts for confirmation.

See Also:

Creating Orders with Pocket Order Entry

Entering Items and Quantities in Pocket Order Entry

Reviewing Line Item Details in Pocket Order Entry

Searching for Products in Pocket Order Entry

Selecting Pocket Order Entry Views

Selecting Products and Quantities Using Reorder Pad in Pocket Order Entry

Uploading Orders to the Host with Pocket Order Entry

Selecting Products and Quantities Using Reorder Pad in Pocket Order Entry

Use the Reorder Pad screen in Pocket Order Entry (Pocket OE) to select products for a customer, based on items and quantities from the customer's previous orders.

Change Pocket OE preferences to adjust which order quantities display on the screen and whether to use Reorder Pad as the default view when creating or editing orders.

> **Note:** Products are sorted alphanumerically on the host system by product description before they are downloaded to the Palm device. If a customer's Reorder Pad contains a product that does not appear in the downloaded Product File, Pocket OE displays the product ID in place of the product description.

To select products and quantities using Reorder Pad in Pocket OE:

1. Start the Pocket OE application.
2. Create or edit an order.
3. Select the Reorder Pad view.

   The Reorder Pad screen displays products and order quantities. Use the Pocket OE Preferences to select whether to display a suggested quantity for the customer to order based on previous purchase habits, or the last quantity of the product that the customer purchased.

Note: If no products or quantities display on the Reorder Pad screen, check whether the Palm SFA HotSync Preferences are set to download Reorder Pad information. Also check your product download parameters.

4. For products on the Reorder Pad screen, do one of the following:

Action	To...
Tap the Product Details icon ()	Display the Product Details screen. Tap **Done** to return to the previous screen.
Tap the Copy Quantity icon ()	Copy either the **Last** or **Sugg** order quantity into the **Order** field.
Enter number in the **Order** field	Enter a different order quantity than one offered by the Reorder Pad information.

Note: Use the scroll buttons () to move up or down in a long list of products.

5. Repeat step 4 to add more products to the order.
6. Change to the following views, as needed:
   - Use Item Entry view to do the following:
     - search for products
     - enter items and quantities
     - review pricing and other line item information
   - Use Order view to review and edit items and quantities on the order.
   - Use Order Header view to enter shipping information.
7. Tap **Done** to return to the main Pocket Ordering screen.

   You can edit transactions by selecting them from the main Pocket Ordering screen.

More Options for Selecting Products and Quantities Using Reorder Pad in Pocket Order Entry

The following are additional options you might use when creating orders using the Pocket OE Reorder Pad view:

To...	Tap the Menu screen button and select...
move the order to another customer	**Orders** > **Move Order** The New Company for Order screen displays.
delete the order	**Orders** > **Delete Order** The application prompts for confirmation.
set Pocket Order Entry preferences	**Orders** > **Preferences** The Pocket Ordering Prefs screen displays.
find the Pocket OE version number	**About** The About Pocket Ordering screen displays.

See Also:

Creating Orders with Pocket Order Entry

Editing Orders with Pocket Order Entry

Entering Items and Quantities in Pocket Order Entry

Pocket Order Entry Overview

Selecting Pocket Order Entry Views

Entering Items and Quantities in Pocket Order Entry

Use the Item Entry view in Pocket Order Entry (Pocket OE) to enter products and quantities on an order. Pocket OE displays the Item Entry screen by default when creating a new order. You can change Pocket OE preferences to display the Reorder Pad to select products and quantities.

Under certain circumstances, entering products through Pocket OE can trigger a system message after you sync the Palm device with the host. When this happens, the host sends a message to the Palm Pocket Order Entry Administrator. Additionally, the order appears in the Remote Order Entry Review Queue.

System messages include the following:

- Customer not found
- Invalid unit of measure
- Product certification required
- Product not found
- Pricing errors, such as expired pricing
- Product certification required
- Product needs to be back-ordered
- System could not match product part number

To enter items and quantities in Pocket Order Entry:

1. Start the Pocket OE application.
2. Create or edit an order.
3. Select the Item Entry view.

4. Search for a product.

Note: If you cannot find the product you need, you can create a nonstock on-the-fly. Although this will not create a new product record on the host system, it generates a message for the person reviewing uploaded orders. This person can then either search the host system for the product, or create the nonstock record on the host.

5. In the **Qty** field, enter the order quantity and tap **Add to Order**.

   You can use the numeric keypad to enter order quantities. Use **Backspace** () or **CLR** to edit the order quantity.

   Pocket OE adds the item to the order and re-displays the Item Entry screen for more items.

6. Repeat steps 4 and 5 to add more products to the order.
7. Do one of the following:
   - Change to a different view:
     - Order view to review and edit items and quantities on the order.
     - Order Header view to enter shipping information.
     - Reorder Pad view to select products and quantities using the Reorder Pad.

   - Tap **Done** to return to the main Pocket Ordering screen.

     You can edit transactions by selecting them from the main Pocket Ordering screen.

More Options for Entering Items and Quantities in Pocket Order Entry

The following are additional options you might use when entering items and quantities using Pocket OE's Item Entry view:

To...	Tap the Menu screen button and select...
move the order to another customer	**Orders > Move Order** The New Company for Order screen displays.
delete the order	**Orders > Delete Order** The application prompts for confirmation.
set Pocket Order Entry preferences	**Orders > Preferences** The Pocket Ordering Prefs screen displays.
use the Palm device's editing menu	**Edit**
find the Pocket OE version number	**About** The About Pocket Ordering screen displays.

See Also:

Creating Orders with Pocket Order Entry

Editing Orders with Pocket Order Entry

Pocket Order Entry Overview

Editing Orders with Pocket Order Entry

Searching for Products in Pocket Order Entry

Selecting Products and Quantities Using Reorder Pad in Pocket Order Entry

Searching for Products in Pocket Order Entry

Search for products in Pocket Order Entry (Pocket OE) by entering the first three (3) alpha-numeric characters that appear in the product's description or additional key words and tapping the **Search** button. Pocket OE only looks at the beginning of words, therefore, "ABC" would match "ABCORE" but not "TABCUT."

You must set the downloaded product file HotSync preferences to include the product's description and keywords before you can search on them. If the **Search** button does not display, you need to download the product file to the Palm device.

You can also search for products by entering the product ID preceded by a period. For example, .1234.

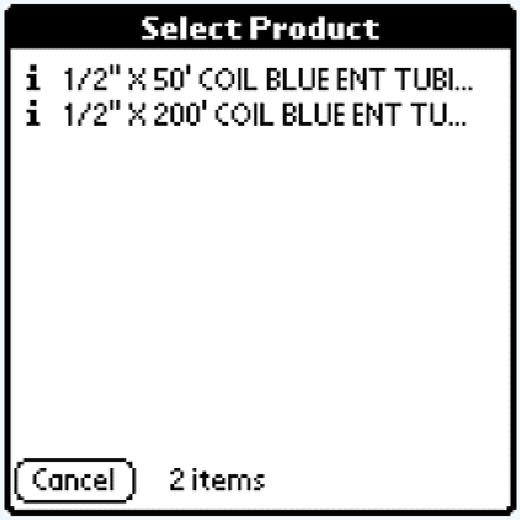
To search for a product in Pocket Order Entry:

1. Start the Pocket OE application.
2. Create or edit an order.
3. Select the Item Entry view.

4. In the **Item** field, enter one of the following and then tap **Search**:
   - The first three characters of the product's description.
   - The first three characters of a product's key word.
   - The product ID preceded by a period.

   The application does one of the following:

If...	Then Pocket OE displays...
no products match the search criteria	a message indicating that no products were found.

<table>
<tr><th>If...</th><th>Then Pocket OE displays...</th></tr>
<tr><td>more than one product matches the search criteria</td><td>the Select Product screen. Tap one of the following:


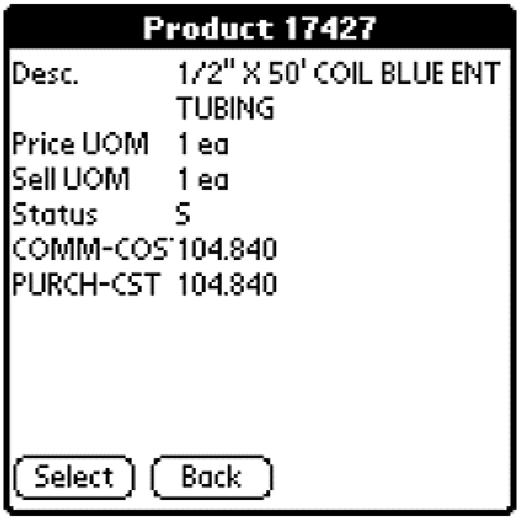
• information icon (i) to display more information about the product. Tap Select to select the product or Back to return to the previous screen.
• product description to select the item.
• the vertical scroll bar to locate and select an item from a long list.
• Cancel to return to the previous screen.</td></tr>
<tr><td>one product matches the search criteria</td><td>the product ID of the matching product in the Item field. The product's description displays beneath the product ID.</td></tr>
</table>

Note: If you cannot find the product you need, you can create a nonstock on-the-fly. Although this will not create a new product record on the host system, it generates a message for the person reviewing uploaded orders. This person can then either search the host system for the product, or create the nonstock record on the host.

5. Continue creating or editing the order.

Product Information

The Product screen displays additional information about the selected product:



Field	Description
Desc	Product description.
Price UOM	The quantity and unit of measure used for pricing the item.
Sell UOM	The unit of measure quantity and unit of measure used for selling the item.
Status	The product status: • **S** – Stock item. • **N** – Nonstock item.
COMM-COST	Commission cost for the item. Price and cost fields use the system defined Global Buy/Sell Basis Names.
PURCH-CST	Purchase cost for the item. Price and cost fields use the system defined Global Buy/Sell Basis Names.

See Also:

Creating Orders with Pocket Order Entry

Downloading the Product File to the Palm Device

Pocket Order Entry Overview

Rebuilding the Product File Index on the Palm Device

Setting Product File HotSync Preferences

Reviewing Line Item Details in Pocket Order Entry

You can review and change line item details using the Pocket Order Entry (Pocket OE) Line Item Details screen. This screen displays a product's unit of measure and quantity for pricing and selling, quantity break information, and pricing information. Price and cost fields use the system defined Global Buy/Sell Basis Names.

Use this screen to do any of the following:

- Review product details
- Change the customer's back order default
- Review and change pricing to offer discounts

  To set a discount for the entire order, use the **Discount** field on the Order View screen.
- Add line item comments

The **Additional** field displays a gross profit ranking for the product. The ranges described below are hard-coded and cannot be changed:

Rank	Indicates that the product has a gross profit...
A	Greater than 30%.
B	Between 25% and 30%.
C	Less than 25%.

If you downloaded Reorder Pad information, that data also displays on the Product Details screen. The information is only as current as the last time the Palm device synchronized with the host system and updated Reorder Pad and Product File information:

Field	Description
Sugg Qty	The quantity of the product the application suggests the customer purchase, based on past purchasing behavior.
Last Qty	The last quantity of the product that the customer purchased.
Last Date	The last time the customer purchased the product.
Customer Price	The last price the customer paid for the product.
UOM	The unit of measure used the last time the customer purchased the product.
Availability	The product's on-hand quantity as of the last Product File update.

▶To display the Line Item Details screen:

1. Start the Pocket OE application.
2. Create or edit an order.
3. Select the Item Entry view.

4. Tap **Line Detail** to display the Line Item Details screen.

   The product description displays at the top of the screen.

   Note: If "Product Not Found" displays at the top of the screen, the current product is a nonstock created on-the-fly.

To review product details:

1. Tap **Product Details** to display the Product Details screen.

   Note: If "Product Not Found" displays at the top of the screen, the current product is a nonstock created on-the-fly.

2. Tap **Comments** to add line item comments.
3. Continue reviewing or changing other line item details.

To review and change product back order defaults:

1. Tap one of the following **BackOrder** options:
   - **Yes –** Instructs the system to backorder the item, if necessary, regardless of the back order status set in the customer record.
   - **No –** Instructs the system not to backorder the item, regardless of the back order status set in the customer record.
   - **Default –** Instructs the system to use the back order status set in the customer record.
2. Continue reviewing or changing other line item details.

To create a discount price for the line item:

Note: Changing pricing can cause you to violate the minimum gross profit percent. The Palm device does not display notification. For more information, see How Palm SFA Messages the Palm Administrator.

1. In the **Discount** field, enter a number and then tap one of the following:
   - **% Off –** Subtracts the value in the **Discount** field as a percentage from the base price. For example, entering **10** means discount the base price by 10%. If the base price is $12.70, the new price would be $11.43.
   - **$ Off –** Subtracts the value in the **Discount** field as a dollar amount from the base price. For example, entering **10** means discount the base price by $10.00. If the base price is $12.70, the new price would be $2.70.
   - **New Price –** Uses the value in the **Discount** field as the new price. For example, entering **10** means change the base price to $10.00. If the base price is $12.70, the new price would be $10.00.

   The **Base Price** field updates with the discounted price or the new price.

   Note: To restore the original line item base price, clear any value from the **Discount** field and tap **ReCalc**.
2. In the **Quantity** field, edit the order quantity, if necessary, and tap **ReCalc**.

   The **Line Total** field displays the base price multiplied by the order quantity.

   After uploading the order to the host system, line item discounts appear as price overrides on the transaction.
3. Continue reviewing or changing other line item details.

See Also:

Adding Line Item Comments in Pocket Order Entry

Creating Orders with Pocket Order Entry

Editing Orders with Pocket Order Entry

How Palm SFA Messages the Palm Administrator

Pocket Order Entry Overview

Using the Default Editing Menu in Palm SFA

Adding Line Item Comments in Pocket Order Entry

Review or add comments to line items using the Line Item Comments screen. Line items with comments attached display the comment icon ().

You can access the Line Item Comments screen from different screens in Pocket Order Entry (Pocket OE):

- Item Entry
- Line Item Details
- Order View

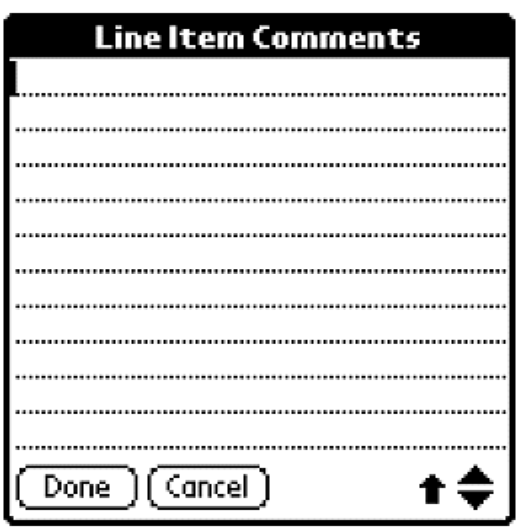
To display the Line Item Comments screen:

1. Start the Pocket OE application.
2. Create or edit an order.
3. Do one of the following:
   - Select the Item Entry view, enter an item, and then tap **Line Detail** to display the Line Item Comments screen, and then tap **Comments**.
   - Select the Order View and then do one of the following:
     - Tap the comment icon () attached to a line item.
     - Select a line item, tap the **Menu** screen button, and then tap **Add Line Item Comment** from the **Line Item** menu.

   The Line Item Comments screen displays.

To add or review a line item comment in Pocket OE:

1. Display the Line Item Comments screen.



2. Enter or review the comment text.

   You can only enter one comment per line item.

3. Tap **Done** to save changes or **Cancel** to quit without saving.

   The application displays the previous screen.

   From the Order View screen, line items with attached comments display the comment icon ().

See Also:

Creating Orders with Pocket Order Entry

Editing Orders with Pocket Order Entry

Entering Items and Quantities in Pocket Order Entry

Pocket Order Entry Overview

Reviewing Line Item Details in Pocket Order Entry

Creating Nonstock Items in Pocket Order Entry

You can use Pocket Order Entry (Pocket OE) to create a nonstock item on-the-fly. This process does not create a new product record on the host system. However, it does send a message to the person reviewing uploaded orders. This person can either search the host system for the product, or create the nonstock record on the host.

If you are using a Palm device with an integral barcode scanner and you scan an item not found in the Pocket OE product file, the application assumes the item is a nonstock. Pocket OE highlights the item on the Item Entry screen, allowing you to enter an order quantity. When you upload the order to the host, the person reviewing the uploaded orders receives a message and they can follow up as required.

The Line Item Details and Product Details screens display "Product Not Found" for nonstock products.

To create a nonstock item in Pocket OE:

1. Start the Pocket OE application.
2. Create or edit an order.
3. Select the Item Entry view.

4. Search for the product.

   Always search for the product in the system before creating a nonstock to avoid creating unnecessary product records.
5. In the **Item** field, enter a product name of up to 18 characters.
6. In the **Qty** field, enter an order quantity.

   Note: Tap **Line Detail** to display the Line Item Details screen, and then **Comments** to add comments about the nonstock. Tap **Done** to return to the Order View screen.

7. Tap **Add to Order**.
8. Continue creating or editing the order.

See Also:

Creating Orders with Pocket Order Entry

Downloading the Product File to the Palm Device

How Palm SFA Messages the Palm Administrator

Pocket Order Entry Overview

Index

P

Palm SFA (sales force automation)

about ... 1

Pocket Contacts

about ... 37

accessing ... 47

adding contact information to events 80

creating records ... 50

deleting records ... 45, 52

editing records ... 50

linking contacts to accounts ... 39

setting up

about ... 41

HotSync preferences .. 28, 42, 58, 88, 111

records on host, accessing ... 25

user preferences ... 44

version ... 46

viewing entries ... 49

viewing transaction information ... 53

Pocket Job Queue

about ... 85

accessing ... 86

setting up

about ... 87

HotSync preferences .. 28, 42, 58, 88, 111

user maintenance ... 19

user preferences ... 90

trackers

additional information ... 102

appending to ... 98

closing ... 104

creating new ... 96

forwarding ... 100

purging ... 95

viewing ... 99

version ... 92

viewing ... 93

Pocket Order Entry

downloading products ... 22

orders

creating ... 128, 138

editing ... 135

Reorder Pad

downloading information ... 22

setting up

product download ... 22

Pocket Scheduler

about ... 55

accessing ... 56

adding contact information to events 80

creating events ... 68

deleting events ... 70

editing events ... 71, 82, 83

purging events ... 63

repeating events ... 73

setting up

about ... 57

display options ... 61

HotSync preferences .. 28, 42, 58, 88, 111

user maintenance........................... 17
user preferences 44, 60
version... 64
viewing your schedule 65, 76, 78
view-only events 83
setting up
accessing contact and customer records 25
authorization keys 15
host system................ 12, 13, 15, 17, 24
HotSync.............. 7, 28, 42, 58, 88, 111
Palm device..................................... 27
parent application............................... 2
product download............................. 22
starting... 30
user maintenance.................. 17, 19, 22
using Find.. 32
Pocket Contacts
about.. 37
accessing 47
adding contact information to events.... 80
creating records.................................... 50
deleting records.............................. 45, 52
editing records...................................... 50
linking contacts to accounts.................. 39
setting up
about.. 41
accessing records on host.................. 25
HotSync preferences 28, 42, 58, 88, 111
user preferences 44
version... 46
viewing entries..................................... 49
viewing transaction information 53
Pocket Job Queue
about.. 85
accessing 86
setting up
about.. 87
HotSync preferences 28, 42, 58, 88, 111
user preferences 90
trackers
additional information..................... 102
appending to.................................... 98
closing 104
creating new 96
forwarding..................................... 100
purging 95
viewing.. 99
version... 92
viewing.. 93
Pocket Scheduler
about.. 55
accessing 56
adding contact information to events.... 80
creating events 68
deleting events 70
editing events 71, 82, 83
purging events...................................... 63
repeating events 73
setting up
about.. 57
display options 61
HotSync preferences 28, 42, 58, 88, 111
user maintenance.............................. 17
user preferences 44, 60
version... 64

viewing your schedule 65, 76, 78

view-only events 83