

# The Closest Thing To Outlook<sup>®</sup> For Your Handheld.



GETTING STARTED MANUAL

# Beyond Contacts

The Most Complete Contacts, Calendar, E-mail, Tasks & Notes for Your Handheld!

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# Welcome

## to Beyond Contacts

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### **The Closest Thing to Outlook For Your Handheld**

Beyond Contacts provides everything you need in one package to manage your Outlook information, from appointments and contacts to e-mail and scheduling on your handheld. It consists of five handheld applications for your Calendar, Contacts, Tasks, Notes and Inbox that support more of the Outlook fields you use, essentially replacing your built-in Date Book, Address, To Do List, Memo Pad and Mail applications. In addition, the applications are integrated on the handheld just like in Outlook; so, there's no need to quit one application just to launch another. Beyond Contacts is the best tool to manage your Outlook information on your handheld the way you're used to on the desktop.

The information in this manual will quickly help you get up and running with Beyond Contacts and explain some of the general features of the product.

# Installing

## Beyond Contacts

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- **From CD-ROM**

Insert the Beyond Contacts CD-ROM into your CD-ROM drive. The install process should begin automatically.

If the install process does not begin automatically, select your CD-ROM drive from "My Computer" or Windows Explorer and double click on the file named "Setup.exe".

- **Installation Location**

By default Beyond Contacts will be installed at C:\Program Files\Beyond Contacts. You may specify a new location by selecting the Change button offered at the beginning of the installation wizard.

- **User Setup**

During the installation you will be asked to choose your handheld username and Outlook profile from two drop-down lists. Be sure that you are selecting your current handheld username and Outlook profile as the installation of the handheld applications and Outlook data synchronization are based upon these settings.

- **E-Mail Setup**

Beyond Contacts includes a separate e-mail application, Inbox To Go\* that integrates with all the Beyond Contacts applications. During the installation you may be given the option to install this application. It will synchronize your Outlook Inbox to the Inbox To Go handheld application each time you synchronize. In addition, Inbox To Go is fully integrated with Documents To Go\*\* for access to e-mail attachments including Word, Excel and picture files.

- **Synchronization**

You will need to perform a HotSync during the installation. During this time the Beyond Contacts handheld applications will be installed and your Outlook data will be synchronized to them.

\* Current owners of DataViz Inbox To Go Wireless will receive an updated version of Inbox To Go Wireless that integrates with Beyond Contacts.

\*\* Documents To Go version 4.005 or higher.

## Using Beyond Contacts for the first time

- 1| **Activate:** On your handheld's Home screen you will see a new icon listed for Beyond Contacts. Tapping on this icon for the first time will bring up an Activation screen. Tap on the Activate button and enter the Registration Number and Activation Key included with your purchase. You can find these numbers on the back of the Beyond Contacts CD sleeve or on the Beyond Contacts Registration Card that were included in your packaging.



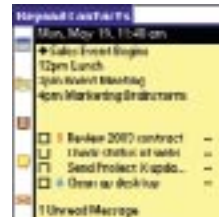
**2 | Map Handheld Buttons:** Upon successful activation, a screen will appear asking if you would like to map your handheld's hardware buttons to your newly installed Beyond Contacts applications. We highly recommend that you choose to map your handheld buttons as it makes the Beyond Contacts applications more easily accessible.



**Tip: Changing the map handheld buttons preference**

You may change your hardware button mapping at a later date by choosing "Map Hardware Buttons" from the options menu within the Today view. Please note that you cannot map your handheld hardware buttons to Beyond Contacts from within your standard Palm preferences application.

**3 | Start Using Beyond Contacts:** Lastly, the Beyond Contacts Today view will open. This view is very similar to the Outlook Today view you see in Outlook on the desktop. From the Today view you can get a quick glance at what you have on the agenda for your current day. Tapping on the Calendar, Contacts, Tasks, Notes, or Inbox icons on the left hand side of this screen will allow you to jump to the specific Beyond Contacts application for each of these data types. You may also tap on a specific appointment, task, or e-mail listing to jump to the corresponding Beyond Contacts application.



**Tip: Quickly open the Today view**

If you map one of your hardware buttons to the Beyond Contacts Calendar, then you can launch the Today view by pressing and holding the Calendar button. You may also map a hardware button to specifically open this view.

**Note: Data compatibility with built-in PIM applications**

Beyond Contacts synchronizes your Outlook data to its own set of databases that are different from those used by your built-in Palm applications. (Date Book, Address, To Do List and Memo Pad). Therefore, the Outlook data that you synchronize will not be available in these built-in applications.

# Navigation

## in Beyond Contacts

There are a few different ways to navigate among the Beyond Contacts applications.

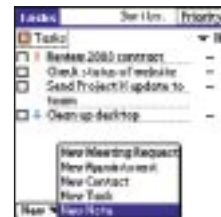
- 1| Folder List:** The Beyond Contacts folder list is available in all applications for easy accessibility to all the folders and subfolders you have in sync similar to the folder list you are familiar with in Outlook. In addition, this makes it very easy for you to jump from one Beyond Contacts application to another without having to exit the application.



- 2| Application Integration:** Each of the Beyond Contacts applications is tightly integrated with one another. This means that you can be within the Tasks application and create a note without first opening the Notes application, or even send an e-mail to a contact chosen from the Contacts application.

*Tip: Create any type of record within all applications*

Tap on the drop-down arrow next to the New button within any of the Beyond Contacts applications to bring up a new record menu.



**Tip:** Access the expert menu

Tap and hold on a contact name to bring up an expert menu. This will allow you to access common operations for that particular record.



**3| Hardware Buttons:** If you map your hardware buttons to Beyond Contacts, you can use them to quickly launch any one of the Beyond Contacts applications.

**4| Today View:** Open the Beyond Contacts Today view and launch one of the Beyond Contacts applications.

## Helpful hints

### General

- Any subfolders within your main Outlook Calendar, Contacts, Tasks or Notes folders will synchronize and be available in Beyond Contacts.
- With Beyond Contacts, you can synchronize between multiple PCs provided that both have Outlook installed.
- Beyond Contacts supports 250 categories and multiple categories per record just like Outlook.

### Calendar

- Choose from 4 view modes. (Day, Work Week, Full Week and Month)
- View any attendees that have been invited to a meeting, or create a new meeting and invite attendees.
- Add color labels to calendar records.
- Sync your Global Address List so you can create a meeting on the handheld and invite your colleagues.

## Contacts

- Sort your contact list in 6 different ways.
- Change how the main list of contacts is displayed through the preferences menu.
- Tap on a contact's phone number or e-mail address to bring up a full phone / e-mail list.

## Tasks

- Create recurring and regenerating tasks.
- Sort your tasks by due date or priority.
- Categorize your tasks for better organization.

## Notes

- Tap and hold on a note within the main list of notes to bring up an expert menu.
- Change the color of a note from the expert menu or from the standard menu after opening the note.
- Sort notes manually or by subject.

## Inbox

- When creating a new e-mail, choosing lookup will display your contacts list.
- When used in conjunction with Documents To Go 4.005 or higher, any supported attachments will automatically be synchronized for use in Documents To Go.

## FAQ

### frequently asked questions

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#### **Where are my Registration Number and Activation Key located?**

*If this software was purchased from a retail software store, mail-order catalog, online store, etc...*

Your Registration Number and Activation Key can be found on the Registration Card included with your product or in your order confirmation e-mail. The online store should have them on file for you as well.

*If this software was purchased directly from DataViz...*

Your Registration Number and Activation Key can be found on your invoice and on the stickers included with your software. You will also receive an e-mail with these important numbers. Be sure to save these numbers in case you need to re-install. If you are re-installing the software and have misplaced your Registration Number and/or Activation Key, please see the following address to look for this information: <http://www.dataviz.com/keys>

## **Can I synchronize Beyond Contacts with multiple computers?**

Yes, you can synchronize Beyond Contacts between multiple computers, provided that you have supported versions of Outlook installed on each computer. Follow the steps below to set up this synchronization relationship:

1. Install Beyond Contacts on the first computer. (ex: work computer)
2. Perform a HotSync with your handheld and the first computer.
3. Install Beyond Contacts on the second computer(ex: home computer)
4. Perform a HotSync with your handheld and the second computer.
5. During this synchronization Beyond Contacts will recognize you are attempting to synchronize with a second computer and you will be prompted to choose an appropriate synchronization method.

## **Where can I find additional help?**

The Beyond Contacts application includes an extensive help program designed to answer many of your questions. You can access the help program from the Beyond Contacts program listing under your Start Menu / Beyond Contacts.

If you need additional assistance, please visit the Tech Support area of our website for your support options: <http://support.dataviz.com>.

## **I'm having problems installing the product. What should I try first?**

Delete any items in your "Temp" directory and try installing again (Note: You may wish to backup the contents of your Temp directory prior to doing this). The Temp directory is typically located in the following locations:

Windows XP, 2000, NT4:

C:\Documents and Settings\ "Windows Username"\Local Settings\Temp

Windows 98, Me:

C:\Windows\Temp or C:\Temp

Our software uses the Temp directory during installation. If there are items left from other programs, they may interfere with the installation. If you get a message that certain items cannot be removed, it is OK to leave them.

## DataViz...

### our products and services

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**Documents To Go® Premium Edition** makes it possible to take your work with you anywhere, which is why it's the # 1 Selling Office suite for handhelds. It allows you to use your Word, Excel and PowerPoint® files; in addition it synchronizes e-mail with attachments, Adobe® PDF files, pictures and Excel-like charts. No matter where you are, Documents To Go makes it possible to quickly make changes to your contracts, financial reports and presentations; even create new files on the handheld. Documents To Go Premium Edition includes essential productivity applications in one box creating a powerful office solution for any mobile professional.

**SmartList To Go™ Suite** allows you to carry lists, forms, and databases on your handheld. Whether you need to track business expenses or access your personal health guide, SmartList To Go gives you the ability to bring almost anything to your handheld. Choose from over 50 useful SmartLists included in the program to help you store and manage your inventory, budget, stocks or CD collections. Build your own SmartLists to organize your personal and professional information, no matter where you are. In addition, synchronize with Microsoft® Access and other databases as well as import data from Excel to your handheld. With SmartList To Go, there is no better way to save time and be more productive!

**Inbox To Go™ Wireless** is a wireless e-mail application for Palm OS® handhelds that allows Documents To Go customers to get their e-mail complete with Microsoft® Word and Excel attachments. After a quick and simple setup, read, reply, forward and even send new e-mail with attachments right from your handheld. Using Documents To Go, edit or create word processing and spreadsheet files, then e-mail them to clients or friends with Inbox To Go Wireless. Attachments sent from the handheld arrive at their destination as real, workable Word and Excel documents. Inbox To Go Wireless along with Documents To Go helps you stay connected to your e-mail no matter where the day takes you!

**Passwords Plus™** Tired of having your logins, accounts and other personal facts all over the place? With Passwords Plus™ organize and secure your personal information such as user names, PINs, credit card numbers, frequent flyer miles, insurance information and more. Whether you use Passwords Plus on your PC, Palm OS® handheld or smartphone, your information stays absolutely secure with industry standard 128 bit Blowfish encryption. Passwords Plus keeps your private data protected, organized and accessible.

**PDA Playground** turns your handheld into an entertaining tool for children ages 3-7 by creating a "child-friendly playground" on your handheld. This playground comes preloaded with six classic games kids will love. Just as important, it keeps your data out of your kids' hands so they can play and you won't worry. It's perfect for car trips, waiting rooms, restaurants, and any time that you need just 15 minutes (or more!) of peace and quiet.

**DataViz<sup>®</sup>**

*Compatibility. Instantly.*

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