



# *PracticeMaster*<sup>™</sup> *Palm*



**Version 12**

PracticeMaster Palm Application Manual

Version 12 (March 2005)

Written by: Software Technology, Inc.

1621 Cushman Drive

Lincoln, NE 68512

(402) 423-1440

[www.PracticeMaster.com](http://www.PracticeMaster.com)

Copyright © 2005 by Software Technology, Inc.

---

---

# Table of Contents

---

---

---

|  |           |
|--|-----------|
| <b>Introduction &amp; Getting Started . . . . .</b>                                      | <b>1</b>  |
| Software Technology, Inc. . . . .  | 1         |
| PracticeMaster Palm Application Overview . . . . .                                       | 1         |
| Computer Requirements . . . . .  | 1         |
| System Requirements . . . . .  | 2         |
| Software Requirements . . . . .  | 2         |
| <b>Installation . . . . .</b>  | <b>2</b>  |
| Installation & Configuration . . . . .   | 2         |
| Installation Overview . . . . .  | 3         |
| Palm Desktop/PracticeMaster Setup. . . . .   | 4         |
| Installing Palm Desktop Software. . . . .  | 4         |
| Installing the PracticeMaster Palm Sync and the PracticeMaster Palm Application. . . . . | 4         |
| Installing the PracticeMaster Palm Application Program on the Handheld . . . . .         | 5         |
| Create PracticeMaster Palm Application Data Files . . . . .                              | 6         |
| Uninstalling the PracticeMaster Palm Application on the Handheld . . . . .               | 7         |
| <b>PracticeMaster Palm Application . . . . .</b>   | <b>7</b>  |
| PracticeMaster Palm Application Buttons. . . . .   | 8         |
| Calendar Information . . . . .   | 9         |
| Calendar Entry Fields . . . . .  | 10        |
| Detail Calendar Entry Fields. . . . .  | 11        |
| Alarm Screen . . . . .   | 12        |
| Monthly Calendar . . . . .   | 12        |
| Client Information. . . . .  | 12        |
| Related Party Information. . . . .   | 13        |
| Related Party Fields . . . . .   | 14        |
| Page 2 Related Party Fields. . . . .   | 15        |
| Filtering Related Parties in the Related Party List Screen. . . . .                      | 15        |
| Timekeeper Information . . . . .   | 16        |
| Calendar Code Information. . . . .   | 16        |
| Category Information . . . . .   | 17        |
| Contact Search . . . . .   | 17        |
| <b>HotSyncing to PracticeMaster. . . . .</b>   | <b>19</b> |
| HotSyncing Notes . . . . .   | 20        |
| Error Messages & Troubleshooting . . . . .   | 20        |

---

---

**Creating & Using Palm App Data Files . . . . . 21**

|   |    |
|---|----|
| Creating PracticeMaster Palm App Data Files . . . . . | 21 |
| PM Palm Application (in PracticeMaster) . . . . .     | 21 |
| Data File Names for Handheld Devices . . . . .        | 23 |

---

**Changing the Handheld User . . . . . 24**

|  |    |
|--|----|
| Resetting the Handheld User Name . . . . . | 25 |
|--|----|

---

---

# Introduction & Getting Started

---

---

---

## Software Technology, Inc.

Since 1979, Software Technology, Inc. has been developing, selling and supporting billing, practice management and financial software for law firms—from solos to 50+ attorney firms. Our software is backed by our professional staff, which has extensive experience in accounting, program development and customer support. We are committed to providing our customers with user-proven, reliable software.

---

## PracticeMaster Palm Application Overview

Software Technology, Inc.'s PracticeMaster Palm Application gives you the ability to integrate PracticeMaster with handheld computers, such as Palm Inc.'s Palm™ Handhelds. This allows timekeepers to pass Client information, Related Party information and Calendar Records from PracticeMaster to the handheld device. Timekeepers can add Related Party information to the handheld as well as modify or add Calendar Records while away from the office and then HotSync the changes made on the handheld back to PracticeMaster. The PracticeMaster Palm Application also includes a Contact Search much like the Contact Search in PracticeMaster.

The following is a list of features that are available in the PracticeMaster Palm Application on the handheld:

- Ability to browse a Monthly Calendar.
- Ability to perform a Contact Search.
- Ability to add, change, and browse Calendar information for your User ID.
- Ability to browse Calendar information for a user or all users associated with a specific client.
- Ability to add and browse Related Party information.
- Ability to browse Client information.
- Ability to browse Timekeeper information.
- Ability to browse Calendar Code information.
- Ability to browse Category information.

---

**Note:** Keep in mind that PracticeMaster offers alternative methods of synchronizing Palm information with PracticeMaster including PracticeMaster Palm Conduits and one-way integration with Palm Desktop. Article R10663 in our Knowledge Base, “Comparing Programs that Integrate with a Handheld” compares and contrasts these different methods. Our Knowledge Base can be found on the Internet at: [support.PracticeMaster.com](http://support.PracticeMaster.com)

---

---

## Computer Requirements

To integrate a handheld computer with PracticeMaster the following software and hardware is required:

## System Requirements

- ❑ Windows XP/2000/Me/98.
- ❑ This software must be installed on a system that supports long file names. This software will not run on older Novell servers that do not support long file names.
- ❑ 34 MB of free hard disk space for PracticeMaster. PracticeMaster Palm Application will only integrate with PracticeMaster Premier; it will not integrate with PracticeMaster Basic.
- ❑ 22 MB of free hard disk space for System Configuration. System Configuration must be installed in order to use PracticeMaster.
- ❑ A Palm OS® Version 4 compatible handheld computer with 1 MB of RAM. At this time, the PracticeMaster Palm Application is not compatible with the Palm OS® Version 5 operating system.

## Software Requirements

- ❑ System Configuration program and PracticeMaster Version 12 are required in order to use the PracticeMaster Palm Application program.
- ❑ Palm Desktop program Version 4.0 or higher.

---

---

# Installation

---

---

---

## Installation & Configuration

There are three software systems required to set up PracticeMaster integration with the handheld:

### **Palm Desktop**

The Palm Desktop software includes the HotSync® Manager that is provided with the handheld. The HotSync® Manager is used to sync information from PracticeMaster to the handheld as well as calendar records and related parties from the handheld to PracticeMaster.

### **PracticeMaster Palm App**

The PracticeMaster Palm Application software from Software Technology, Inc., is automatically shipped with PracticeMaster and is installed on the handheld. This program displays the PracticeMaster client and related party information on the handheld and also allows you to add to or modify your PracticeMaster calendar records and add related parties.

### **PracticeMaster Palm Sync**

The PracticeMaster Palm Sync program (i.e., CMPALM.EXE) from Software Technology, Inc., is automatically shipped with PracticeMaster. Once installed to the PracticeMaster program directory, the PracticeMaster Palm Sync program works behind the scenes with the HotSync® Manager to pass information between PracticeMaster and the handheld as well as calendar records and related parties from the handheld to PracticeMaster.

---

## Installation Overview

The following represents a summary of the installation process to set up the integration between the handheld and PracticeMaster.

1. **Set up System Configuration User IDs** (*File|Open|Users*). These users will be used as your handheld User IDs.

---

**Note:** For integration with PracticeMaster, the user(s) of the handheld(s) must be set up as users in the System Configuration program. To integrate properly, the user of the handheld *must* have the same name as the User ID in the System Configuration program. The System Configuration program only allows 8 characters for the User ID and does not allow spaces or special characters other than the underscore character. If the user name on the handheld does not match these requirements, you will need to rename the user of the handheld to conform to the 8-character limit. *Instructions for changing the user name of the handheld can be found in Appendix A of this manual on page 24.*

---

2. **Install the Palm Desktop software** as discussed in the “Installing Palm Desktop Software” section on page 4. If you already have the Palm Desktop software installed, you can skip to step 4.
3. **Configure Handheld Users** in the Palm Desktop software (*Tools|Users*).

---

**Note:** This step is necessary only if you are configuring multiple handheld users at this time.

---

4. **Install the PracticeMaster Palm Sync** program and the **PracticeMaster Palm Application** program as described in the “Installing PracticeMaster Palm Sync and PracticeMaster Palm Application” section on page 4.
5. **Install the PracticeMaster Palm Application** program onto the handheld device as described in the “Installing the PracticeMaster Palm Application Program on the Handheld” section on page 5.
6. **Create PracticeMaster Palm Application Data Files** by running the **PM Palm Application** program in PracticeMaster and HotSync the data to the handheld as described in the “Create PracticeMaster Palm Application Data Files” section on page 6.

## Palm Desktop/PracticeMaster Setup

In order for the Handheld integration to work, the User ID in System Configuration and the User in the Palm Desktop must match as shown in Fig. 1 and Fig. 2.

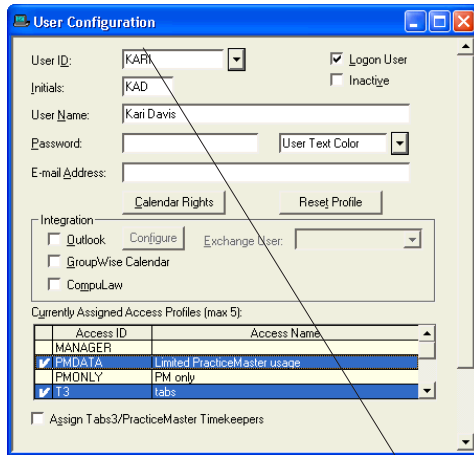


Fig. 1, System Configuration User Configuration Window

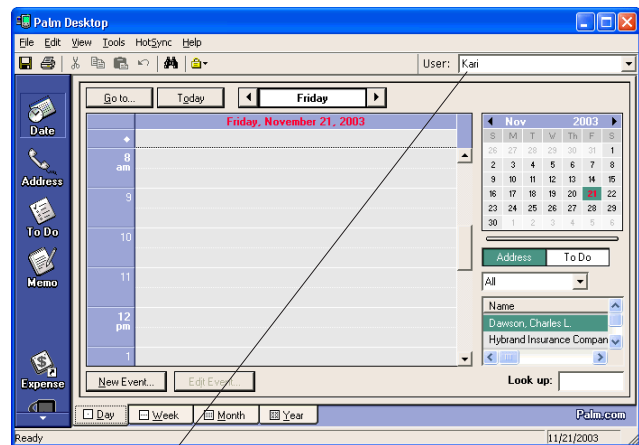


Fig. 2, Palm Desktop Program

For our example, **Kari** is the same user in both System Configuration and the Palm Desktop.

## Installing Palm Desktop Software


The Palm Desktop software needs to be installed on each PC that will be used to HotSync. To install the Palm Desktop software, follow the instructions included with the handheld.

**Note:** If you are configuring the PracticeMaster integration to work with multiple User IDs and multiple handheld users, you will need to set up each user in the Palm Desktop software. Consult the handheld manual for instructions on setting up multiple users.

**Note:** If you are setting up multiple users to use the PracticeMaster Palm Application with the handheld, setting up a user profile in the Palm Desktop software will not work. You must configure each user separately.

## Installing the PracticeMaster Palm Sync and the PracticeMaster Palm Application

The PracticeMaster Palm Sync and the PracticeMaster Palm Application software are supplied on the CD-ROM with the PracticeMaster software. These programs are optionally installed when PracticeMaster is installed.

During the installation, the PracticeMaster Palm Sync program is added to the Startup folder. A  icon will be displayed in the Windows system tray when the program is running. In order for a HotSync to complete between PracticeMaster and the handheld, the PracticeMaster Palm Sync program must be running as well as the HotSync® Manager.

When the PracticeMaster Palm Application program is installed, a SATFORMS directory is added under PracticeMaster's program directory. The SATFORMS directory contains the files used to install the PracticeMaster Palm Application onto the handheld.

## ► To install the PracticeMaster Palm Sync & the PracticeMaster Palm Application

1. Insert the CD-ROM into your CD-ROM drive.
2. A CD Browser program will automatically start.

---

**Note:** If the CD-ROM Autorun feature is disabled, click the **Start** button, and then click **Run...** Click the **Browse** button and navigate to the CD-ROM drive. Double-click the **LAUNCH.EXE** file. Click **OK**.

---

3. Select the appropriate menu option depending on whether you are installing full working versions or trial versions.
4. Follow the on-screen instructions to install the software. From the checklist of products, select **System Configuration, PracticeMaster, PracticeMaster Palm Application**, and any other software you would like installed.

Once the installation is complete, a **Palm Software** folder is added to the *Start | Programs | Software Technology* folder. This folder includes the following programs:

|  |  |
|--|--|
| <b>Install PracticeMaster Palm App</b>         | This program is used to install the PracticeMaster Palm Application onto the handheld.   |
| <b>PracticeMaster Palm Sync</b>                | This program works behind the scenes with the HotSync® Manager to pass information between PracticeMaster and the handheld.  |
| <b>Update Registry</b>                         | Only one copy of the PracticeMaster Palm Application software can be functional on a single computer. If you have installed multiple copies of the PracticeMaster Palm Application software, you will need to use the “Update Registry” program to make the specified installation functional by updating the appropriate paths in the registry. For example, if you have a full working version of the PracticeMaster Palm Application installed and you install a PracticeMaster Palm Application trial version, you will need to run the Update Registry program located in the <i>Start   Programs   Software Technology   Palm Software</i> folder before you will be able to use the full working version. Once the Update Registry program is run, in order to be able to use the PracticeMaster Palm Application trial version, you will need to run the Update Registry program located in the <i>Start   Programs   Software Technology   Trial Software   Palm Software</i> folder. |
| <b>Update PracticeMaster Palm Desktop Link</b> | This program is used to update registry entries if needed.   |

## Installing the PracticeMaster Palm Application Program on the Handheld

In addition to installing the PracticeMaster Palm Application on each computer that will perform a HotSync operation, the Palm Application software must also be installed on each handheld.

---

**Note:** Before proceeding with the following instructions, make sure the Palm Desktop software has already been installed on the computer that will be performing the HotSync operations.

---

## ► To install the PracticeMaster Palm Application to the Handheld

1. Click the **Start** button, and then select *Programs | Software Technology | Palm Software | Install PracticeMaster Palm App*.

---

**Note:** If the **Palm Software** menu option is not shown in the Software Technology folder, the required folder and its contents can be added to your workstation by running the SETUP.EXE program located in PracticeMaster's program directory. You can access the SETUP.EXE program using the following steps:

1. From the workstation, click the **Start** button, and then click **Run...**
  2. Click the **Browse** button and select the directory where PracticeMaster is installed. Then, select the **SETUP.EXE** file found in the directory and click **OK** to run the program.
  3. Follow the on-screen instructions to run the **SETUP** program.
- 

2. Handheld Registry entries will be created, the HotSync Manager will be started and the "PracticeMaster PRC Installer" window will be displayed. Specify the User of the handheld in the **User Name** field as shown in Fig. 3.



Fig. 3, PracticeMaster PRC Installer Window

3. Click the **Install** button.
4. A "Waiting for HotSync" window will be displayed. Press the **HotSync** button on the handheld to continue.
5. The PracticeMaster Palm Application program will be installed on the handheld.

## Create PracticeMaster Palm Application Data Files

Before performing a second HotSync, you will need to run the **PM Palm Application** program in PracticeMaster to create the files for synchronization. This program creates the Palm Application data files that are used to pass the PracticeMaster client, related party, timekeeper, category, calendar records, calendar code and contact search information to the handheld during a HotSync. The **PM Palm Application** program in PracticeMaster will need to be run twice. Once to create data files with calendar entries and a second time to create data files with client, related party and contact search information. (*Note: Each time the **PM Palm Application** program in PracticeMaster is run, the timekeeper, category and calendar code data files are created.*) Detailed information regarding the **PM Palm Application** program in PracticeMaster can be found on page 21.

1. Start PracticeMaster.

---

**Note:** Make sure you log into PracticeMaster with the User ID that matches the handheld user. Failure to do so will prevent you from editing any calendar records from PracticeMaster in the handheld.

---

2. From the **Integration** Task Folder, click the 'Handheld Integration' icon.
3. Select the 'PM Palm Application' icon.
4. Select the **Calendar Entries** option to create data files containing calendar records.
5. Specify a beginning date, an ending date, whether to include calendar entries without a due date, whether to include calendar entries without a Client ID, whether to include calendar entries of all users for selected clients and specify whether to include calendar records for all clients or specific clients.
6. Click **OK**.
7. Once the task is complete, click **OK**.
8. Now you need to create data files for clients, related parties and other contact search information. Select the **Client and Related Party Files** option.

9. Specify which Client and Related Party information is to be passed to the PracticeMaster Palm Application and click **OK**.
10. Once the task is complete, click **OK**.
11. Close the PM Palm Application window in PracticeMaster.
12. Press the **HotSync** button on the handheld to transfer the data files to the handheld.

## Uninstalling the PracticeMaster Palm Application on the Handheld

---

**Note:** The following steps may vary between handheld devices.

---

### ► To uninstall the PracticeMaster Palm App

1. From the handheld, on the Application Screen, tap the time displayed in the upper left corner.
2. Once the **App** menu is displayed, tap the **Delete** menu option.
3. Tap **PM** and then tap **Delete**.
4. A message will be displayed asking you to confirm that you want to delete the PM application and the data. Tap **Yes** to delete the program and data.

---

**Note:** The PracticeMaster Palm Application is a Satellite Forms Application. Therefore, the following files are also installed on the handheld to run the PracticeMaster Palm Application: Sat.FormsEERDK4.0, SDDIPalmDB, SF\_EE\_SysHeap, and SFE\_LSListBox (these files are not deleted when the PracticeMaster application is deleted). Provided that no other Satellite Forms applications are installed on the handheld (i.e., Tabs3 Palm App), you can also manually delete these files.

---


---

---

# PracticeMaster Palm Application

---

---

Once you have set up the handheld to integrate with PracticeMaster and the PracticeMaster Palm Application data files are HotSynced to the handheld, you are ready to begin to use the PracticeMaster Palm Application on your handheld. The  icon will be displayed on the handheld.

### ► To use the PracticeMaster Palm Application

Tap 

This button displays the PracticeMaster Palm Application (App) program as shown in Fig. 4. Tapping the various buttons on the PracticeMaster Palm App screen displays the associated program.

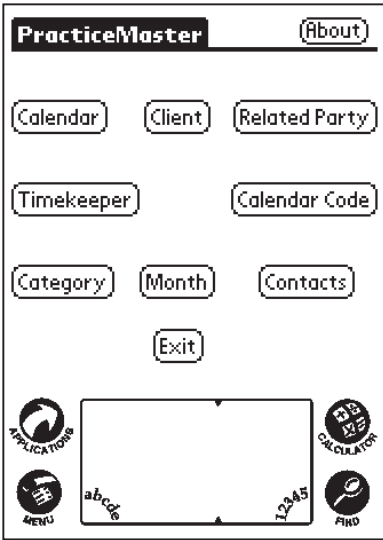


Fig. 4, PracticeMaster Palm App Screen

## PracticeMaster Palm Application Buttons

When using the software on the handheld, the following buttons can be used to perform various functions.

- |               |   |               |  |
|---------------|---|---------------|--|
| <b>Add</b>    | Tapping the <b>Add</b> button allows you to add a record to the file you are accessing.   | <b>Cancel</b> | Tapping the <b>Cancel</b> button closes the window without saving the record.                |
| <b>Delete</b> | Tapping the <b>Delete</b> button deletes the selected record from the handheld. Only records added to the handheld that have not been transferred to PracticeMaster can be deleted. | <b>Detail</b> | Tapping the <b>Detail</b> button displays additional information for the record.             |
| <b>Done</b>   | Tapping the <b>Done</b> button closes the window, saving any changes made.  | <b>Exit</b>   | Tapping the <b>Exit</b> button closes the PracticeMaster Palm Application.                   |
| <b>Filter</b> | Tapping the <b>Filter</b> button displays a drop-down arrow allowing you to specify how you want the information filtered.  | <b>Next</b>   | Tapping the <b>Next</b> button displays the information for the next record in the file.     |
| <b>Page 1</b> | Tapping the <b>Page 1</b> button displays the information on page 1 of the record.  | <b>Page 2</b> | Tapping the <b>Page 2</b> button displays the information on page 2 of the record.           |
| <b>Prev</b>   | Tapping the <b>Prev</b> button displays the information for the previous record in the file.  | <b>Select</b> | Tapping the <b>Select</b> button displays the detailed information for the highlighted item. |
| <b>View</b>   | Tapping the <b>View</b> button displays the information for the highlighted record.   |               |  |

## Calendar Information

The PracticeMaster Palm Application software allows you to view or change calendar records transferred from the PracticeMaster system for the handheld user as well as create new calendar records for the PracticeMaster system. You can also view other user's calendar records that were HotSynced from the PracticeMaster system.

**Notes:** You cannot edit calendar records for the handheld user that are part of a Calendar Plan or that were generated for multiple users. For example, if a meeting was scheduled for multiple users, you will not be able to edit that calendar record.

Calendar records added to the handheld from PracticeMaster cannot be deleted from the handheld.

Any change made to a calendar record that exists in both the handheld and in PracticeMaster will be discarded if the associated field in PracticeMaster was also changed prior to the HotSync. For example, if a calendar record in PracticeMaster was moved to a different Due Date in PracticeMaster, a change made to the **Due** field for the associated record in the handheld will be ignored.

Tap 

Tapping this button on the PracticeMaster Palm App screen displays a Calendar List as shown in Fig. 5. Tapping a calendar record in the list or tapping the **Select** button when a calendar record is highlighted displays the calendar record with the following information: Client ID, Type (Event or Task), Related Party (R/P), Due, Completed (Cmplt), Start, End, Calendar Code (Code), and Description (Desc) as shown in Fig. 6. Tapping the **Detail** button displays Alarm information, the Priority, the Private option, the User ID as well as the entire Description (Desc) as shown in Fig. 7.

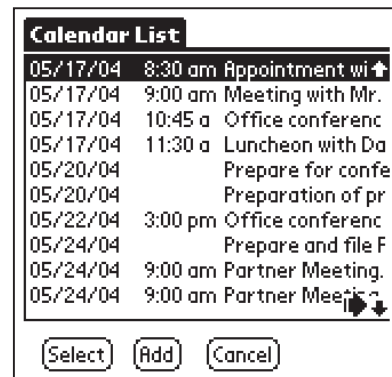


Fig. 5, Calendar List Screen

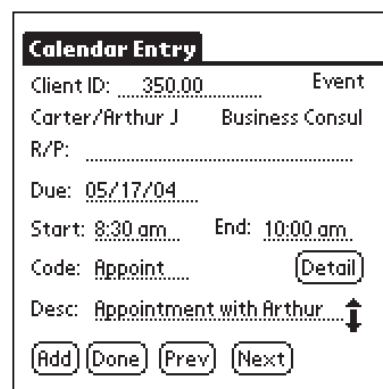


Fig. 6, Calendar Entry Screen

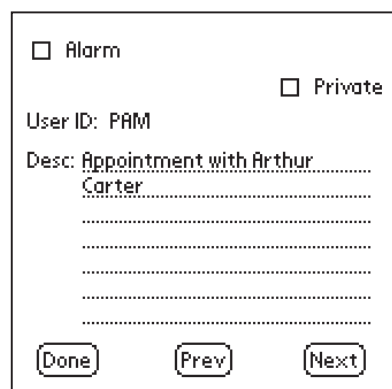


Fig. 7, Calendar Detail Screen

From the Calendar List screen or from the Calendar Entry screen, calendar records for the handheld user can be added to the handheld that can then be HotSynced to PracticeMaster.

### ► To add calendar records from the Calendar List or Calendar Entry screen

Tap 

This button displays a Calendar Entry screen allowing you to add a new calendar record.

## Calendar Entry Fields

When a new calendar record is added, the following information can be specified:

**Client ID** The **Client ID** field can be used to associate a Client ID with the calendar record. Tapping the drop-down arrow next to the **Client ID** field displays the Client List screen allowing you to select a client from the list. The order in which the clients are displayed is determined by the **Client Order** that was specified when the PracticeMaster Palm App data files were created using PracticeMaster. The **Find** field or the arrows on the right side of the Client List screen can be used to advance to a specific client in the list. Selecting a client from the list displays the client name and work description below the **Client ID** field. Fig. 14 and Fig. 15 on page 13 are examples of a Client List screen.

**Type** The **Type** field is displayed next to the **Client ID** field. This field allows you to specify whether the calendar record is an **Event** or a **Task**. Clicking the ▼ symbol lets you change the calendar type.

**R/P** The Related Party field can be used to associate a Related Party to the calendar record. Tapping the drop-down arrow next to the **R/P** field displays the Related Party List screen allowing you to select a Related Party from the list. The **Find** field or the arrows on the right side of the screen can be used to advance to a specific related party in the list. Fig. 18 on page 14 is an example of a Related Party List screen.

**Due** The **Due** field can be used to specify a Due Date for the calendar record. Tapping the **Due** field displays a Select Date screen allowing you to select a date from the calendar as shown in Fig. 8.

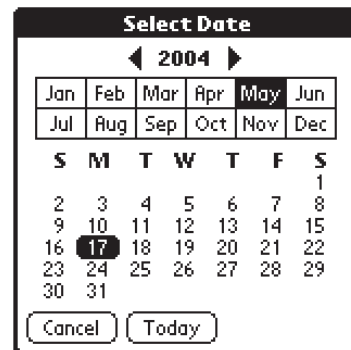


Fig. 8, Select Date Screen

**Cmplt** The **Cmplt** field is only available for task calendar records and allows you to specify the date the task calendar record was completed. Tapping the **Cmplt** field displays a Select Date screen allowing you to select a date from the calendar as shown in Fig. 8.

**Start** The **Start** field allows you to specify a start time for the calendar record. Tapping the drop-down arrow next to the **Start** field displays a Select Time screen allowing you to type a time in the **Time** field, select a time from the list or tap the **Set to Current** button as shown in Fig. 9.

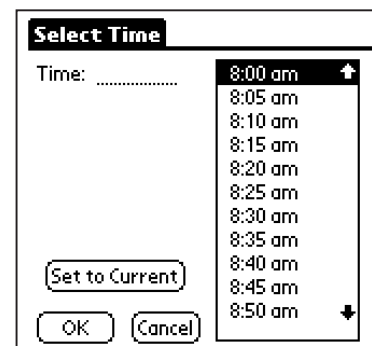


Fig. 9, Select Time Screen

**End** The **End** field is only available for event calendar records and allows you to specify an ending time for the calendar record. Tapping the drop-down arrow next to the **End** field displays a Select Time screen allowing you to specify a time as shown in Fig. 9.

**Code** The **Code** field allows you to associate a Calendar Code with the calendar record. Tapping the drop-down arrow next to the Calendar Code field displays the Calendar Code List screen allowing you to select a Calendar Code from the

list. Once a Calendar Code is specified, the description for the Calendar Code is displayed in the **Desc** field of the Calendar Entry screen.

**Desc**

The **Desc** field can be used to include a description for the calendar record. When a Calendar Code is specified in the **Code** field, the default description will be displayed in the **Desc** field replacing any existing description. The **Desc** field allows you to enter information for the description as well as add additional information to the Calendar Code description.

## Detail Calendar Entry Fields

When adding a calendar record, additional features are available for the calendar record.

Tap **Detail**

The **Detail** button can be used to access additional fields as shown in Fig. 10.

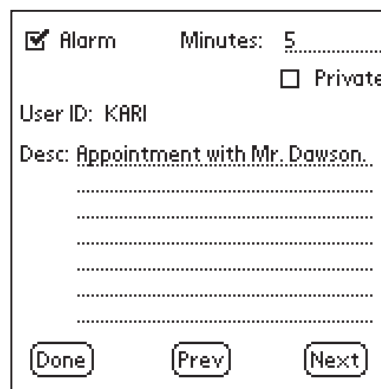


Fig. 10, Calendar Detail Screen

The following fields are available on the Calendar Detail screen:

**Alarm**

The **Alarm** check box is only available when a time is specified in the **Start** field of the calendar record. This check box is used to determine if the calendar record will create a Record Alarm in the PracticeMaster system and an Alarm in the handheld as shown in Fig. 11 on page 12.

**Minutes**

This field is used in conjunction with the **Alarm** option. When the **Alarm** check box is selected, the **Minutes** field determines when a Record Alarm for the event or task will be displayed in the PracticeMaster system and an Alarm screen will be displayed on the handheld as shown in Fig. 11 on page 12.

**Priority**

This **Priority** field is only available for task calendar records. This field is used to assign a priority to a task. The **Priority** field is a single digit field that can have a value of 0 to 9 with 0 being the highest priority and 9 being the lowest priority. Assigning tasks a specific priority allows you to specify the importance of a task.

**Private**

The **Private** check box can be used to designate whether a PracticeMaster calendar record is a Private calendar record or a Public calendar record.

**User ID**

When a calendar entry is added in the handheld, the **User ID** defaults to the user of the handheld and cannot be changed.

**Desc**

The **Desc** field on the Detail screen allows you to view, add, change, or delete all the information in the field.

To save the calendar record, tap **Done**.

## Alarm Screen

Saving a calendar record with the **Alarm** check box selected will cause the handheld to display an Alarm screen as shown in Fig. 11 when the date and time on the handheld match the alarm date and time. For example, you enter a calendar record for today at 11:00 am. Selecting the **Alarm** check box on the detail Calendar screen displays the **Minutes** field. Leaving the **Minutes** field empty will display the Alarm screen at 11:00 am. If a number is entered in the **Minutes** field, the Alarm will be displayed the specified number of minutes before 11:00 am.

Once the Alarm screen is displayed, tapping the **Snooze** button snoozes the alarm for 1 minute. Tapping the **Reset** button deactivates the alarm. Tapping the **Detail** button displays the Calendar Entry screen with the calendar record information.

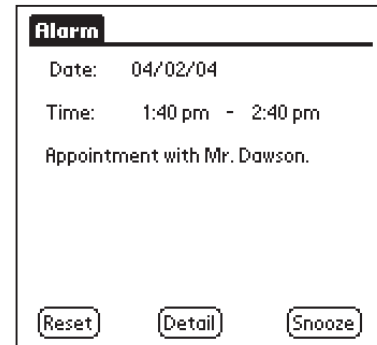


Fig. 11, Alarm Screen

## Monthly Calendar

The PracticeMaster Palm Application program on the handheld allows you to view a monthly calendar. When calendar records are scheduled in the morning, a hash mark is displayed in the upper right-hand corner next to the date. When calendar records are scheduled in the afternoon, a hash mark is displayed in the lower right-hand corner next to the date. An example of the monthly calendar is shown in Fig. 12.

Tap 

Tapping this button on the PracticeMaster Palm App screen displays a Monthly Calendar as shown in Fig. 12. Tapping a marked date displays the last calendar record scheduled for the date selected as shown in Fig. 13. If more than one calendar record is scheduled for the day selected, tapping the **Prev** button in the Calendar Entry window displays the previous calendar record for that day.

A marked date indicates there are calendar entries for that date.

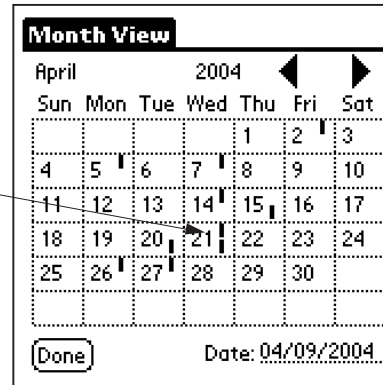


Fig. 12, Month View Screen

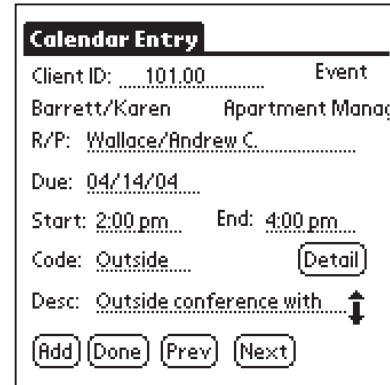


Fig. 13, Calendar Entry for 4/24/02

## Client Information

The PracticeMaster Palm Application software on the handheld allows you to view Client information transferred from the PracticeMaster system.

Tap 

Tapping this button on the PracticeMaster Palm App screen displays a Client List. The order in which the clients are displayed is determined by the **Client Order** that was specified when the PracticeMaster Palm App data files were created using PracticeMaster. Specifying a **Client Order** of **Client ID** displays a Client List as shown in Fig. 14. Specifying a **Client Order** of **Name Search** displays a Client List as shown in Fig. 15. The **Find** field or the arrows on the right side of the screen can be used to advance to a specific client in the list.

Tapping the **Select** or **View** button when a client is highlighted displays the information for the client. The first page of information includes the following fields: Client ID, Name, Work Description (Desc), Contact, Phone 1 (w-Work), Phone 2 (f-Fax), Phone 3 (h-Home), and Phone 4 (c-Cellular) as shown in Fig. 16. Tapping the **Page 2** button displays the following information: Email, Address 1, Address 2, Address 3, City, State, Zip, Primary Timekeeper (Prim), and Category (Cat) as shown in Fig. 17.

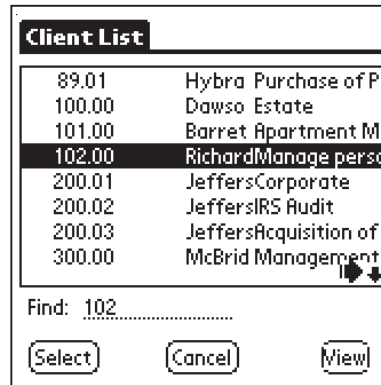


Fig. 14, Client List - Client ID Order

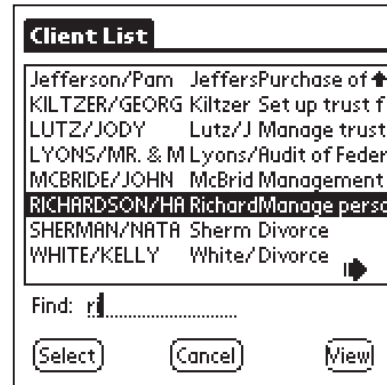


Fig. 15, Client List - Name Search Order

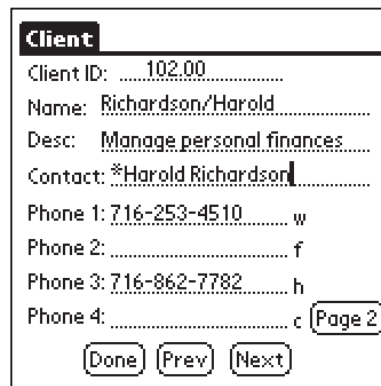


Fig. 16, Client Information - Page 1

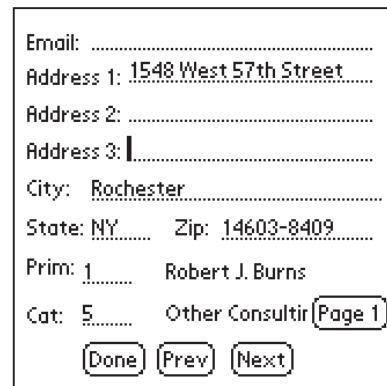


Fig. 17, Client Information - Page 2

## Related Party Information

The PracticeMaster Palm Application software on the handheld allows you to view Related Party information transferred from the PracticeMaster system as well as add new Related Party records. Once a Related Party is added in the handheld, changes can be made to that record until it is HotSynced to the PracticeMaster system. Once the Related Party is HotSynced to the PracticeMaster system, all editing for the Related Party record *must* be performed in PracticeMaster.

Tap **Related Party**

Tapping this button on the PracticeMaster Palm App screen displays a Related Party List as shown in Fig. 18. The **Find** field or the arrows on the right side of the screen can be used to advance to a specific related party in the list. Tapping the **Select** or **View** button when a related party is highlighted displays the information for the related party. The first page of information includes the following: Key, Name, Contact, Phone 1 (w-Work), Phone 2 (f-Fax), Phone 3 (h-Home), and Phone 4 (c-Cellular) as shown in Fig. 19. Tapping the **Page 2** button displays the following information on the second screen: E-mail, Address 1, Address 2, Address 3, City, State, Zip, Organization (Org), and Related Party Category (RP Cat) as shown in Fig. 20.



Fig. 18, Related Party List Screen

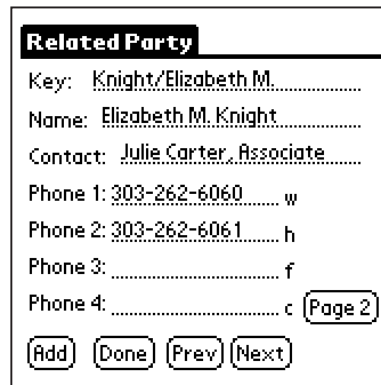


Fig. 19, Related Party Information - Page 1

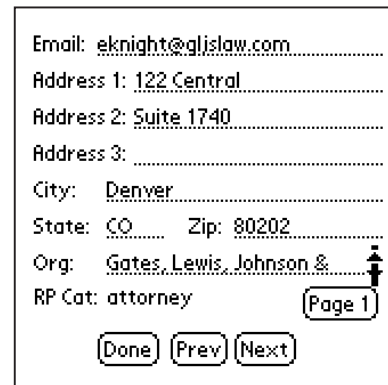


Fig. 20, Related Party Information - Page 2

In PracticeMaster, related parties can be assigned to up to eight related party categories. However, only the first category for the related party will be associated with the related party in the handheld. For example, if a related party is assigned to the Doctor and Expert Witness categories in PracticeMaster, the related party will show only the Doctor category on the handheld.

On the Related Party List screen, new related parties can be added to the handheld which can then be HotSynced to PracticeMaster. Related parties added to the handheld are added to the end of the Related Party List screen. They will be reordered the next time related party files are created using the **PM Palm Application** program in PracticeMaster and synchronized.

---

**Note:** When performing a Contact Search on the handheld, any related parties added to the handheld will not be included in the search until the information has been HotSynced to PracticeMaster, added to the PracticeMaster Palm App data files and then HotSynced back to the handheld.

---

► **To add related parties from the Related Party List screen**

Tap  This button displays a Related Party screen allowing you to add a new related party.

## Related Party Fields

When a new related party is added, the following information can be specified:

|                    |   |
|--------------------|---|
| <b>Key</b>         | This field corresponds to the <b>Related Party Key</b> field in PracticeMaster. This field is typically the name of the related party and uses a special Last Name/First Name format.   |
| <b>Name</b>        | This field corresponds to the <b>Full Name</b> field in PracticeMaster and is used to store the related party's full name. During a HotSync, if the <b>Name</b> field is left blank on the handheld, PracticeMaster will automatically fill in the corresponding <b>Full Name</b> field with the information in the handheld <b>Key</b> field. For example, if "Jackson/Robert" is used for the handheld <b>Key</b> field, "Robert Jackson" will be added in PracticeMaster's <b>Full Name</b> field. |
| <b>Contact</b>     | This field corresponds to the <b>Contact Name</b> field in PracticeMaster and indicates the contact person for the related party.   |
| <b>Phone 1 (w)</b> | This field corresponds to the <b>Work Phone</b> field in PracticeMaster and is used to specify the work phone for the related party.  |
| <b>Phone 2 (h)</b> | This field corresponds to the <b>Home Phone</b> field in PracticeMaster and is used to specify the home phone for the related party.  |
| <b>Phone 3 (f)</b> | This field corresponds to the <b>Fax Phone</b> field in PracticeMaster and is used to specify the fax phone for the related party.  |
| <b>Phone 4 (c)</b> | This field corresponds to the <b>Cell Phone</b> field in PracticeMaster and is used to specify the cell phone for the related party.  |

## Page 2 Related Party Fields

Additional information for the related party can be added to Page 2.

|                    |   |
|--------------------|---|
| <b>Email</b>       | This field corresponds to the <b>E-mail</b> field in PracticeMaster and is used to specify the e-mail address for the related party.  |
| <b>Address 1-3</b> | These fields correspond to the <b>Address 1-3</b> fields in PracticeMaster and are used to specify the address for the related party.   |
| <b>City</b>        | This field corresponds to the <b>City</b> field in PracticeMaster and is used to specify the city for the related party.  |
| <b>State</b>       | This field corresponds to the <b>State</b> field in PracticeMaster and is used to specify the state for the related party.  |
| <b>Zip</b>         | This field corresponds to the <b>Zip</b> field in PracticeMaster and is used to specify the zip code for the related party.   |
| <b>Org</b>         | This field corresponds to the <b>Organization</b> field in PracticeMaster and indicates the organization associated with the related party.   |
| <b>RP Cat</b>      | This field corresponds to the <b>Category</b> field in PracticeMaster and is used to classify the related party by type. When adding a related party in the handheld, this field is not accessible. You must classify the related party in the PracticeMaster system <i>after</i> the related party is HotSynced to PracticeMaster. |

## Filtering Related Parties in the Related Party List Screen

The Related Party List screen includes a **Filter** button. This button allows you to filter related parties by category. Tapping the **Filter** button displays a drop-down arrow along with the category that was

last used to filter the Related Party List. (Note: The first time you use the filter, if you have related parties without a Related Party Category, the blank category will be used as the filter.) Tapping the drop-down arrow displays a list of categories that are associated with the related parties on the handheld allowing you to filter the related parties using a different category. The full Related Party list will be filtered so that only related parties associated with that category will be included in the list as shown in Fig. 21. Keep in mind that PracticeMaster allows up to eight categories to be assigned to each related party. However, only the first category assigned to the related party will be passed to the handheld.

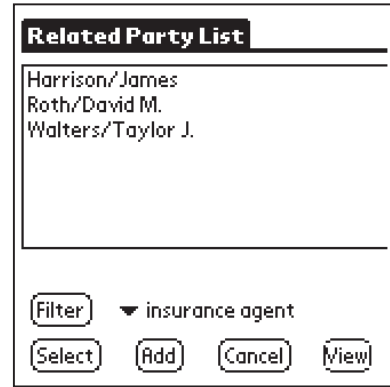


Fig. 21, Related Party List Filter Screen

**Note:** The **Find** function is not available when filtering.

## Timekeeper Information

The PracticeMaster Palm Application software on the handheld allows you to view a Timekeeper list transferred from the PracticeMaster system.

Tap 

Tapping this button on the PracticeMaster Palm App screen displays the Timekeeper List as shown in Fig. 22. Highlighting a timekeeper record in the list and tapping the **Select** or **View** button displays the information for the timekeeper as shown in Fig. 23.

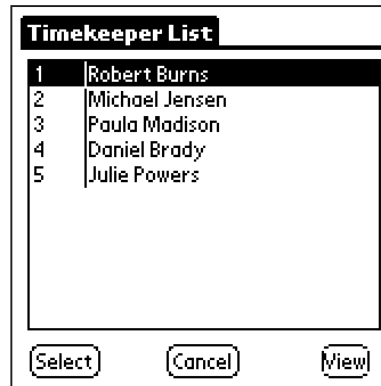


Fig. 22, Timekeeper List Screen

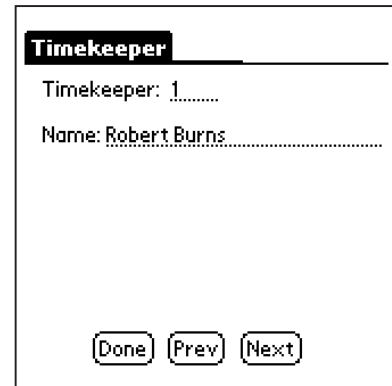
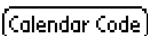


Fig. 23, Timekeeper Information

## Calendar Code Information

The PracticeMaster Palm Application software on the handheld allows you to view Calendar Code information transferred from the PracticeMaster system.

Tap 

Tapping this button from the PracticeMaster Palm App screen displays the Calendar Code List as shown in Fig. 24. Highlighting a Calendar Code record in the list and tapping the **Select** or **View** button displays the information for the Calendar Code. The following information is displayed: Code, Type, Alarm, Minutes, Priority, Private, and Description (Desc) as shown in Fig. 25.



Fig. 24, Calendar Code List

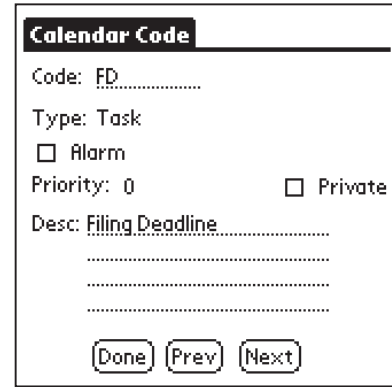


Fig. 25, Calendar Code Information

## Category Information

The PracticeMaster Palm Application software on the handheld allows you to view Category information transferred from the PracticeMaster system.

Tap 

Tapping this button on the PracticeMaster Palm App screen displays the Category List as shown in Fig. 26. Highlighting a Category record in the list and tapping the **Select** or **View** button displays the information for the Category as shown in Fig. 27.



Fig. 26, Category List

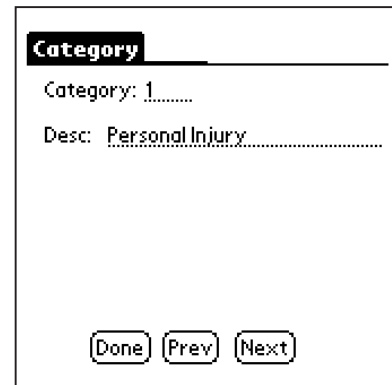


Fig. 27, Category Information

## Contact Search

The PracticeMaster Palm Application program on the handheld allows you to perform a search for a specific name in the following fields:

- The **Name** field in the Client file
- The **Contact** field in the Client file
- The **Related Party Key** field in the Related Party file

When a contact search is performed, only the first word in the field will be searched. For example, if “Cindy Roberts” is the name in the Client **Contact** field, a search for “Cindy” will display the Client file record. However, a search for “Roberts” will not include the record.

**Note:** Related parties added in the handheld will not be included in the Contact Search until the information is HotSynced to PracticeMaster, added to the PracticeMaster Palm App data files and then HotSynced back to the handheld.

Tap 

Tapping this button on the PracticeMaster Palm App screen displays a Contact Search screen as shown in Fig. 28. This program allows you to type a name in the field next to the **Lookup** button and then tap the **Lookup** button to search the Client file **Name** field, Client file **Contact** field, and the Related Party file **Related Party Key** field for any hits.

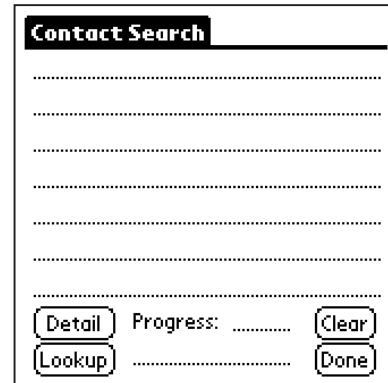


Fig. 28, Contact Search Screen

► **To perform a Contact Search**

1. At the bottom of the Contact Search screen, type the name to be searched in the field next to the **Lookup** button.
2. Tap the **Lookup** button. The progress of the search will be displayed in the **Progress** field. Once the search is complete, **Done** will be displayed in the **Progress** field and any records containing the word that you searched for are displayed in a list as shown in Fig. 29. *(Note: If the search includes more than 7 hits, the **Lookup** button changes to a **More** button allowing you to display the next 7 records.)*
3. Tap the record in the list to be displayed. *(Note: When more than one hit is found and you tap a record in the middle of the list, once you are finished viewing that record, you must tap the **Lookup** button again in order to display any hits located above that hit.)*
4. The record will be displayed allowing you to view the information in the record as shown in Fig. 30.

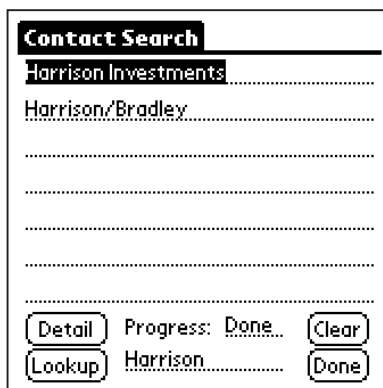


Fig. 29, Contact Search for Harrison

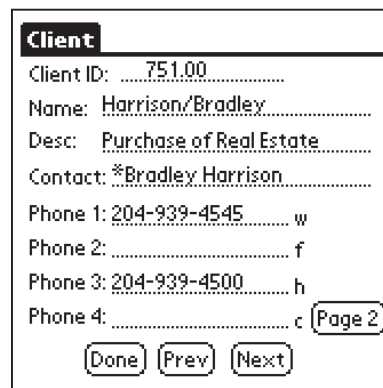


Fig. 30, Client Record for Harrison

---

---

# HotSyncing to PracticeMaster


---

---

When a HotSync is performed, any changes or additions to the calendar entries on the handheld are passed to PracticeMaster (provided there are no errors). Likewise, any Related Parties that were added on the handheld are passed to PracticeMaster. All existing data on the handheld will remain in the handheld unless new PracticeMaster Palm App data files are created prior to the HotSync.

The following steps can be used to HotSync PracticeMaster and the handheld if you do *not* want different or updated client, related party, or calendar information passed to the handheld.

► **To HotSync the Handheld to PracticeMaster (without updating the Handheld)**

1. Make sure the  icon is displayed on the Host PC's Desktop System Tray. If the icon is missing, click *Start | Programs | Software Technology | Palm Software | PracticeMaster Palm Sync* to start the program.
2. Place the handheld in its cradle.
3. Press the **HotSync** button on the handheld.
4. Once the HotSync is complete, a CMPALM.LOG file is created if errors were encountered. View the CMPALM.LOG file located in the PracticeMaster program directory with any text editor such as Windows Notepad to determine if any errors were reported.

---

**Note:** Any new clients, related parties or calendar records added to PracticeMaster will not be passed to the handheld using the above procedure.

---

The following steps can be used to HotSync PracticeMaster and the handheld if you want different or updated information passed to the handheld.

► **To HotSync the Handheld and PracticeMaster with New and Updated Information**


1. Start PracticeMaster.

---

**Note:** Make sure you log into PracticeMaster with the User ID that matches the handheld user. Failure to do so will prevent you from editing any calendar records from PracticeMaster in the handheld.

---

2. From the **Integration** Task Folder, click the 'Handheld Integration' icon.
3. Select the 'PM Palm Application' icon. (*Detailed information regarding the PM Palm Application program can be found on page 21.*)
4. Select the **Calendar Entries** option to create data files containing calendar records. Specify a beginning date, an ending date, whether to include calendar entries without a due date, whether to include calendar entries without a Client ID, whether to include calendar entries of all users for selected clients and specify whether to include calendar records for all clients or specific clients.
5. Click **OK**.

6. Once the task is complete, click **OK**.
7. Select the **Client and Related Party Files** option if you want new related parties or different clients transferred back to the handheld. Specify which Client and Related Party information is to be passed to the PracticeMaster Palm Application and click **OK**.
8. Once the task is complete, click **OK** and then close the PM Palm Application window.
9. Make sure the  icon is displayed on the Host PC's Desktop System Tray. If the icon is missing, click **Start | Programs | Software Technology | Palm Software | PracticeMaster Palm Sync** to start the program.
10. Place the handheld in its cradle.
11. Press the **HotSync** button on the handheld.
12. Once the HotSync is complete, a CMPALM.LOG file is created if errors were encountered. View the CMPALM.LOG file located in the PracticeMaster program directory with any text editor such as Windows Notepad to determine if any errors were reported.

---

## HotSyncing Notes

The following is a list of important guidelines to be aware of when performing a HotSync:

- Calendar entries from the handheld are merged using the User ID in PracticeMaster that is associated with the handheld user.
- If the calendar data files in PracticeMaster are not created for the appropriate User ID (using the PM Palm Application program in PracticeMaster) prior to HotSyncing, the merged calendar entries will be attributed to the correct User ID in PracticeMaster. However, you will not be able to edit calendar entries from PracticeMaster in the handheld for that User ID since the current data files are associated with a different User ID. *(Note: In order to prevent this from occurring, make sure you log into PracticeMaster as the correct handheld user **prior** to running the PM Palm Application program in PracticeMaster.)*
- If a calendar record is created in the PracticeMaster Palm Application with a Client ID that has not been added to PracticeMaster, an invalid Calendar Code, or an invalid Related Party, the calendar record will not be merged and an error will be generated in the CMPALM.LOG file. However, the calendar record will be copied back to the handheld device.
- The client, related party, and calendar information is not deleted from the handheld each time a HotSync is performed. Client, related party, and calendar information on the handheld is only updated if new data files in PracticeMaster are created using the PM Palm Application program in PracticeMaster prior to a HotSync.
- When related parties are added to the handheld, you must create new related party data files in PracticeMaster prior to a HotSync in order for the new related parties to be included in a handheld Contact Search.
- In the handheld, changes cannot be made to Related Parties that exist in PracticeMaster.
- In the handheld, changes cannot be made to 1) calendar records that are linked to multiple users; 2) calendar records that were created from a Calendar Plan Template; or 3) calendar records that belong to other User IDs.
- If integrated with Microsoft Outlook, calendar entries are not integrated with Outlook when a HotSync is performed. However, if you are configured for Two-Way integration with Outlook, you can run the Outlook Synchronization program in PracticeMaster to pass the calendar records to Outlook.
- If integrated with Novell GroupWise, calendar entries are not integrated with GroupWise when a HotSync is performed.

---

## Error Messages & Troubleshooting

Detailed information regarding errors when a HotSync is performed can be found in our Knowledge Base at:

**[www.support.PracticeMaster.com](http://www.support.PracticeMaster.com)**

Search for article R10654 or the keyword "Handheld".

---

---

# Creating & Using Palm App Data Files

---

---

The PracticeMaster Palm Application data files are the key for accurately integrating information between a handheld device and PracticeMaster. These files are created in PracticeMaster and are used to populate data in the handheld device. The data files hold the following information.

- ❑ Client ID and Client Information
- ❑ Related Party Information
- ❑ Calendar Records
- ❑ Timekeeper Information
- ❑ Category Information
- ❑ Calendar Code Information
- ❑ Contact Search Information

---

## Creating PracticeMaster Palm App Data Files

The PracticeMaster Palm App data files are created using the **PM Palm Application** program in PracticeMaster. When creating all PracticeMaster Palm App data files, you will need to run this program twice—once for Calendar Entries and once for Client and Related Party Files. PracticeMaster Palm App data files are created for the User ID logged into PracticeMaster. These data files will be added to the handheld during the next HotSync. The Palm App data files are deleted from the PracticeMaster working directory once transferred to the handheld. However, each time a HotSync is performed, all Palm App data files are stored in the handheld until new data files are created. If you are working with several handhelds and users, it is especially important to log into PracticeMaster with the associated User ID when creating the data files prior to performing a HotSync. Doing so will ensure calendar records are transferred back to the handheld device as well as will help eliminate potential conflicts in transferring information between the handheld and PracticeMaster.

### PM Palm Application (in PracticeMaster)

|                 |   |
|-----------------|---|
| Menu Selections | <i>Maintenance   Integration   Handheld Integration   PM Palm Application</i> |
| Task Folders    | <i>Integration   Handheld Integration   PM Palm Application</i>               |

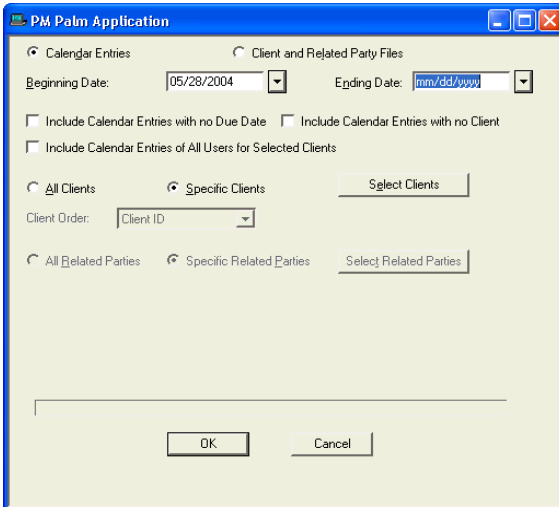


Fig. 31, PM Palm Application Window in PracticeMaster with Options for Calendar Entries

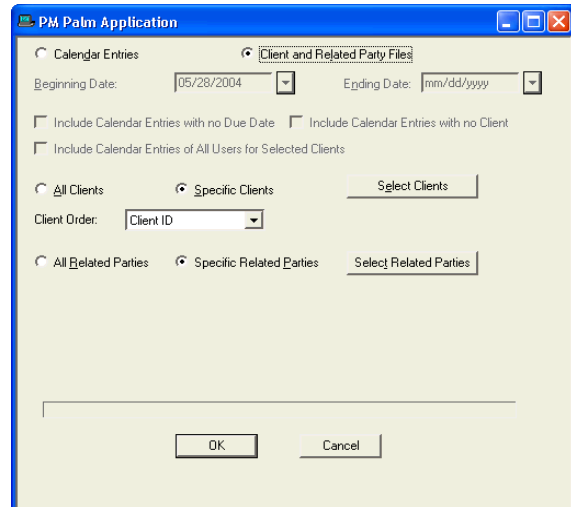


Fig. 32, PM Palm Application Window in PracticeMaster with Options for Clients and Related Parties

The PM Palm Application window in PracticeMaster allows you to create data files for the Palm Application as shown in Fig. 31 and Fig. 32. This program needs to be run twice—once for calendar entries and once for clients and related parties. The following fields are used when exporting data to be used by the PM Palm Application program:

**Calendar Entries**

Selecting the **Calendar Entries** option creates calendar data files for event and task calendar records for the User logged into PracticeMaster.

**Client and Related Party Files**

Selecting the **Client and Related Party Files** option creates client and related party data files for the specified clients and related parties. The data files include information such as address, phone, city, state, zip, contact, e-mail, etc.

**Beginning Date**

This field is available when the **Calendar Entries** option is selected. The default date is 180 days prior to the current system date. Specifying a beginning date in the **Beginning Date** field creates a calendar data file for calendar records with **Due Date** on or after the date specified. If the calendar record is completed, the **Date Completed** will be used instead of the **Due Date**.

**Ending Date**

This field is available when the **Calendar Entries** option is selected. Specifying an ending date in the **Ending Date** field creates a calendar data file for calendar records with a **Due Date** on or before the date specified. If the calendar record is completed, the Date Completed will be used instead of the **Due Date**.

**Include Calendar Entries with no Due Date**

This field is only available when the **Calendar Entries** option is selected. Selecting this check box includes calendar entries without a date in the **Due Date** field.

**Include Calendar Entries with no Client**

This field is only available when the **Calendar Entries** option is selected. Selecting this check box includes calendar entries without an associated Client ID.

**Include Calendar Entries of All Users for Selected Clients**

This field is only available when the **Calendar Entries** option is selected. Selecting this check box includes calendar entries for all Users who have calendar entries associated with the selected Client IDs. This allows you to view calendar entries for other users included on the handheld.

---

**Note:** Only calendar entries for which the user has access rights to will be included in the data files.

---

|                         |   |
|-------------------------|---|
| <b>All Clients</b>      | <p>When the <b>Calendar Entries</b> option is selected, select the <b>All Clients</b> option to create a data file with all event and task calendar records for all clients for the dates specified.</p> <p>When the <b>Client and Related Party Files</b> option is selected, select the <b>All Clients</b> option to create a client data file including all clients.</p>   |
| <b>Specific Clients</b> | <p>When the <b>Calendar Entries</b> option is selected, select the <b>Specific Clients</b> option to create a data file for task and event calendar records for specific clients for the dates specified.</p> <p>When the <b>Client and Related Party Files</b> option is selected, select the <b>Specific Clients</b> option to create a client data file including specific clients.</p> <p>The <b>Select Clients</b> button can be used to open a Client window allowing you to select which clients you want included in the data file.</p> <hr/> <p><b>Note:</b> Secure clients will not be included unless the user logged into PracticeMaster has manager rights or has been assigned access to the secure client.</p> <hr/> |

|                     |  |
|---------------------|--|
| <b>Client Order</b> | <p>This field is only available when the <b>Client and Related Party Files</b> option is selected. Select the order in which you want clients listed in the client lookup windows on the handheld. The <b>Client Order</b> specified also determines whether the <b>Client ID</b> or <b>Name Search</b> will be used with the PracticeMaster Palm App <b>Find</b> function.</p> <p><b>Client ID</b> - Select <b>Client ID</b> if you want clients listed in Client ID order on the handheld and want to find clients on the handheld using their Client ID.</p> <p><b>Name Search</b> - Select <b>Name Search</b> if you want clients listed in alphabetical order by their <b>Name Search</b> field and want to find clients on the handheld using their Name Search.</p> |
|---------------------|--|

|                                 |  |
|---------------------------------|--|
| <b>All Related Parties</b>      | <p>This field is available when the <b>Client and Related Party Files</b> option is selected. Select the <b>All Related Parties</b> option to create a related party data file including all related parties.</p>  |
| <b>Specific Related Parties</b> | <p>This field is available when the <b>Client and Related Party Files</b> option is selected. Select the <b>Specific Related Parties</b> option to create a related party data file including specific related parties.</p> <p>The <b>Select Related Parties</b> button can be used to open a Related Party window to select which related parties you want included in the data file.</p> |

The **OK** button can be used to begin the creation of the data files. Once the process has been started, a status bar will be displayed at the bottom of the window indicating the progress of the program.

The **Cancel** button can be used to close the PM Palm Application window.

---

**Note:** If a data file already exists, a message will be displayed. Click **OK** if you want to overwrite the contents of the existing data file. Otherwise, click **Cancel** if you want to use the contents of the existing data file.

---

## Data File Names for Handheld Devices

The data files are created and saved in the PracticeMaster working directory. The table below includes the names of the data files that are created and the PracticeMaster source files.

| Date Files Created for PracticeMaster Palm App |                    |  |               |                                |
|--|--------------------|--|---------------|--------------------------------|
| Data File                                      | Source File        |  | Data File     | Source File                    |
| CMCAL.DBF                                      | Calendar File      |  | CMTYPE.DBF    | Calendar File                  |
| CMCASE.DBF                                     | Client File        |  | CMPRIOR.DBF   | Calendar File                  |
| CMRELATE.DBF                                   | Related Party File |  | CMTIME.DBF    | Calendar File                  |
| CMEMPL.DBF                                     | Timekeeper File    |  | CMCUSTOM.DBF  | Customization File             |
| CMCAT.DBF                                      | Category File      |  | CMCONTACT.DBF | Client and Related Party Files |
| CMCALCOD.DBF                                   | Calendar Code File |  | CMRPCAT.DBF   | Related Party File             |
| CMCASSRT.DBF                                   | Client File        |  |               |                                |

# Appendix A

## Changing the Handheld User

There are two instances where you may need to rename the user of your handheld:

- If you already have handheld users set up and the User ID in the Palm Desktop software does not match the requirements in the System Configuration software, you will need to rename the user in the Palm Desktop software. System Configuration requires that the User ID be no longer than 8 characters and does not allow spaces or other special characters other than the underscore character.
- If you are sharing a handheld between users, you will need to reset the user on the handheld each time the handheld is given to a different user. Doing so ensures that the calendar entries are attributed to the correct User ID in PracticeMaster when a HotSync is performed.

---

**Note:** Before changing the user name on the handheld, you will want to make sure that you first HotSync the information from the current user. Also, you will need to have the new user set up in the Palm Desktop software and the System Configuration program.

---

For example, let's say you have two users named John and Mary who are already set up in the Palm Desktop software and the System Configuration program. John has entered information into the PracticeMaster Palm Application program on the handheld and wants his information merged into PracticeMaster. The handheld will then be given to Mary. In this situation, you would perform the following:

1. HotSync John's calendar entries and related parties into PracticeMaster. Check to see if any entries were not merged and resolve them. (*Note: Since you don't want to update John's information on the handheld, it is not necessary to create new PracticeMaster Palm App data files before HotSyncing.*)
2. Reset the handheld for Mary as described below.
3. Create handheld data files in PracticeMaster for Mary's information. (*Note: When creating the data files, a message may be displayed indicating the data files already exist. Click **Yes** to overwrite the data because you want to create data files that contain Mary's information.*)
4. HotSync Mary's information into the handheld.
5. The handheld can now be given to Mary.

---

## Resetting the Handheld User Name

|                            |  |
|----------------------------|--|
| <b>Handheld Selections</b> | <i>Applications   Memo Pad   New</i>   |
| <b>Write</b>               | A cursive lowercase “L” on the letter portion of the graffiti pad. ( <i>This is the same symbol used for activating shortcuts defined in the Handheld Manual.</i> )  |
| <b>Tap twice</b>           | On the letter side of the graffiti pad.  |
| <b>Write or Insert</b>     | The number 5 on the number portion of the graffiti pad. The text in the memo will disappear after inserting the number 5.  |
| <b>Tap</b>                 | <i>Done   Applications</i>   |
| <b>Run HotSync</b>         | This will bring up the HotSync Progress window. When identifying the user, a dialog box will show the user list from the Palm Desktop software. You will be able to choose the new user for the handheld. When finished, a message will appear asking you to reset the handheld. |
| <b>Tap</b>                 | Reset. The user has now been reset.  |

---

**Note:** You can check to see if the user on the handheld has changed by making the handheld selections *Applications | HotSync* immediately after changing the user. At the top of the screen it will say Welcome <User>. If the above steps do not allow you to reset the user, you will need to first perform a soft reset as described in your Handheld Handbook and then repeat the steps to reset the user.

---

