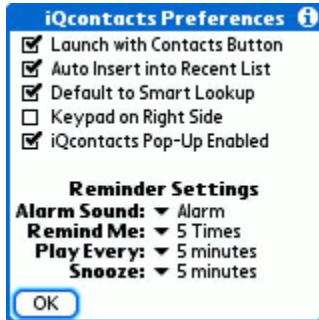


iQcontacts User's Manual

Running iQcontacts



When **Launch with Contacts Button** is checked in the iQcontacts Preference screen, iQcontacts will run instead of the built in Contacts application that came with your Palm.



On some Treo / Centro devices, tap the **Contacts Tab** in the Phone Application to launch iQcontacts.



On other Treo / Centro devices tap the iQcontacts **Favorite** button, to launch iQcontacts.

On Palm organizers that are not smart phones, the Contacts button will launch iQcontacts. You can also tap the iQcontacts icon in the applications list to launch iQcontacts.

iQcontacts uses the database of the built-in Contacts application. Any changes that you make in iQcontacts, will be seen in the Contacts application, and on the Palm Desktop after a HotSync has been done.



When you run iQcontacts you are initially in Lookup View, this displays a list of names and numbers.

With Smart Lookup you look up a name using the keyboard or graffiti.

Dialing a number

One of the things that you do most often on your Treo / Centro is look up a contact and dial the number. With iQcontacts, you can do this in the fastest way possible using the 5-way navigator.



To dial a number that is selected in **Lookup View**, press the right button of the 5-way navigator. This will open the Dialing screen.



To dial a number that is displayed in **Record View**, press the right button of the 5-way navigator, or tap the Dial button on the screen.

This will open the Dialing screen.



On the **Dialing Screen**, the default number will be selected. To select a different number, use the 5-way navigator to scroll up or down.

To dial the selected number, press the center button of the 5-way navigator or tap the Dial button on the screen.



The number will be dialed.

Help Menu

iQcontacts has a built-in Help for easy access to learn about all the features and customization.

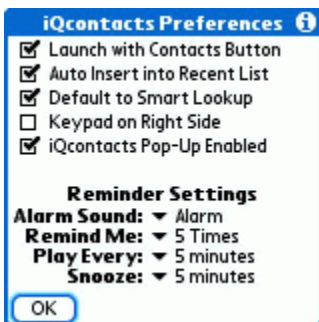


Run iQcontacts, tap the top left corner of the screen, and tap the Help menu.

You can select any feature from the Help menu list and see useful information about that feature. This will help you get the most out of iQcontacts.

Customizing iQcontacts - iQcontacts Preferences

You can set up iQcontacts to work in a way that is most convenient for you.



Run iQcontacts, tap the top left corner of the screen. From the Options menu, select **iQcontacts Prefs**.

Tapping the **i** (information symbol) in the upper right corner of the screen will provide additional information about the preferences that can be set on that screen.

Launch with Contacts Button

When the **Launch with Contacts Button** checkbox is checked,

iQcontacts will be launched whenever the Contacts button is pressed. This is the default setting.

If the **Launch with Contacts Button** is not checked, then the built-in Contacts application will be run when the Contacts button is pressed (not recommended).

Auto Insert into Recent List

This allows you to decide whether records that you open will automatically be inserted into the recent list or not.

When the **Auto Insert into Recent List** checkbox is checked, and a record is shown in Record View, the Recent List checkbox will always be checked. This is the default setting.

If the **Auto Insert into Recent List** checkbox is not checked, the Recent List checkbox will only be checked when opening a record that is already in the Recent List.

You can override the default whenever you open a record, by checking or un-checking the Recent List checkbox for that record. See Recent Number Management for further details.

Default to Smart Lookup

If the **Default to Smart Lookup** checkbox is checked, whenever iQcontacts is opened, you will be in Smart lookup mode, and the Smart label will be displayed. This is the default setting.

If the **Default to Smart Lookup** checkbox is not checked, you will be in Standard lookup mode, and the LookUp label will be displayed (not recommended).

Keypad on Right Side

You should set the position of the keypad buttons based on which hand you are going to use to tap the buttons. If you are going to tap the buttons with your right hand, then you will want the buttons on the right side. However, if you are going to tap the buttons with your left hand, you will want the buttons on the left side of the screen. This way you won't block the view of the names when you are tapping the buttons.

When **Keypad on Right Side** is not checked, the keypad will be on the left side in Stylus Free lookup mode. This is the default setting.

If **Keypad on Right Side** is checked, the keypad will be on the right side.

iQcontacts Pop-Up Enabled

If you check the **iQcontacts Pop-Up Enabled** checkbox, you will be able to pop-up iQcontacts from any application. This allows you to lookup phone numbers while you are running another application. Once you have found the number that you were looking for, you will continue where you left off in the application that you were running. This is the default setting.

If you uncheck the **iQcontacts Pop-Up Enabled** checkbox, you will not be able to pop-up iQcontacts from another application.

Alarm Sound

The **Alarm Sound** dropdown list lets you select which sound will be played when an iQcontacts reminder is triggered. You can pick any sound that is installed on your Palm organizer. Several sounds are pre-installed on the Palm organizer however additional sounds can always be added.

Remind Me

The **Remind Me** dropdown list lets you specify how many times the Alarm Sound will be played if you do not respond to the alarm. This number is in addition to the initial sounding of the alarm.

Play Every

The **Play Every** dropdown list lets you specify how often the Alarm Sound will be repeated if you do not respond to the alarm.

Snooze

The **Snooze** dropdown list lets you specify the default Snooze time for a reminder. When an iQcontacts reminder is triggered, you can choose to Snooze. If you tap the Snooze button on the Phone Reminder screen, you will Snooze for the default Snooze time. You can override the default Snooze time when the alarm sounds.

Color Settings



iQcontacts allows you to use color, when it is being run on a color device. This allows you to easily differentiate between the Recent Number List and regular numbers, as well as set a background color for the application in order to give it a more pleasant look.



This color scheme is also used to highlight matching characters in Smart lookup and Stylus Free lookup.

There is a default color scheme that is used on color devices. The color scheme can be changed, or disabled from the Color Settings screen. In order to change the color setting, run iQcontacts, open the menu, and select Color Settings from the Options menu.



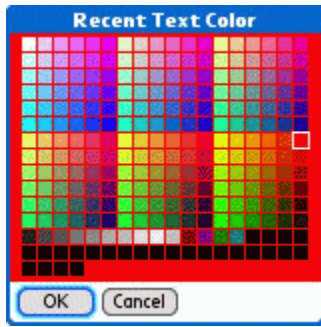
If you are using a device that supports color, the Use Color checkbox will be checked, and there will be four buttons for changing the color parameters.
 Form Background
 List Text Color
 Recent Background
 Recent Text Color

Next to these buttons, you'll see List Text and Recent Text displayed in their selected colors on their selected backgrounds.

The Form Background color is used as the form background for all of the screens in iQcontacts.

The List Text Color is used for displaying regular (non-recent) records in Lookup View, as well as all records in Record View.

The Recent Text Color and Recent Background are used to display recent numbers in Lookup View, and highlighted characters in Smart lookup or Stylus Free lookup.



In order to change any of the colors; tap the button for the parameter you want to change. You'll get a Color Pick dialog, and the current color for the parameter will be highlighted.

Select a color, and tap the OK button in order to change the color, or tap the Cancel button to return to the Color Settings screen without changing the color.

The Color Settings screen will be updated to reflect the color that was selected. On the Color Settings screen, there is a Use Default Colors button. This allows you to reset the color scheme to its default setting.


NOTE: It is recommended to use light colors for background colors, and darker colors for the text.

Lookup View

When you run iQcontacts, it opens up in **Lookup View**. It will be in one of the following modes:

- Smart Lookup
- Stylus Free Lookup

In the Smart Lookup, the label next to the input field indicates what mode you are in. If you want to use the Stylus Free Lookup, tap the abc... button.

In Stylus Free lookup mode you can easily lookup names without using the stylus, and without using Graffiti. You can use your finger to tap the buttons, and quickly find a name. You can switch back to Smart or Standard lookup by tapping the  button.

Smart Lookup

Using Smart Lookup, you can lookup records based on the First Name, Last Name, or Company Name, without needing to re-sort your Contacts. You can also lookup a record using a combination of First Name and Last Name.

If a record has two names in the First Name field and those names are separated by a single character (George & Judy or George + Judy), you can enter either name when you are looking up this contact.



When you start to enter a name in the Smart field, the first matching record will be selected, and the matching characters will be highlighted. You will see a list of records whose First Name, Last Name, or Company Name matches the entered text. You will also see records where the first letter of the First name and beginning letter(s) of the Last Name, match the entered text.



As you enter more text, the number of matching records will be reduced.

Use the Up and Down keys on the 5-way navigator to scroll through the list.

To open the selected record, press the center button on the 5-way navigator, or tap the name.

If you enter enough letters to uniquely identify a name, the record will automatically be opened in Record View.

Tap the Clear button to clear the entered text and start again.

Note: In graffiti, once you select a contact, you can enter a linefeed stroke to open the highlighted record.

Smart lookup is very handy if you don't remember the last name of the person who you want to look up, but you remember their first name, or the name of the company that they work for. It is also convenient for getting a list of all the people who work for a certain company.



Enter the first letter of the First Name, and then start entering the Last Name:

Example: [a] [g] [o]



Use a **space** as a separator between the First Name and Last Name.

Start entering the First Name. After you've entered a few letters, enter a space, and then start entering the Last Name:

Example: [a] [l] [space] [g]



Enter the complete First Name, and then start entering the Last Name:

Example: [a] [l] [i] [c] [e] [g]



Use a space as a separator between the Last Name and First Name.

Start entering the Last Name. After you've entered a few letters, enter a space, and then start entering the First Name:

Example: [g] [o] [space] [a] [l]

Stylus Free Lookup

You can easily lookup names without using the stylus, and without using Graffiti. Use your finger to tap the buttons, and quickly find a name. To go into Stylus Free lookup mode, tap the abc... button from Standard lookup or Smart lookup mode.

Stylus Free lookup mode always uses Smart lookup. You can lookup records based on the First Name, Last Name, or Company Name, without needing to re-sort your Contacts. You can also lookup a record using a combination of First Name and Last Name. As you tap the buttons, the matching characters will be highlighted, and the matching records will be displayed.

In Stylus Free lookup mode, the names are displayed without the phone numbers. You will see the phone numbers when you open a record in Record View.



In Stylus Free lookup, you enter names by tapping the buttons on the screen. Each button has 3 or 4 letters. In order to enter a name, tap the button that contains the letter that you want to enter.

Tap the ? button to enter any character that is not a letter. This includes spaces, numbers, and punctuation.

The ? button can also be used as a separator between the First Name and Last Name. If you tap the ? button, in order to skip from the First Name to the Last Name (or from the Last Name to the First Name), the name that has been partially entered will be completely highlighted.

Tap the Clear button to delete the last character that was entered. Tap the Clear button and keep it pressed until you hear a beep (about 1/2 second), to delete all of the characters that have been entered.



When you start to enter a name, you might see some records that you did not expect to see. This is a result of having 3 or 4 letters on each button.

Example: To enter Alice, tap the following buttons: [abc] [jkl]

You will see a long list.



Tap one more button: [ghi]

There will be fewer records in the list, and you can select the desired record.

In most cases, after tapping a few buttons, you will see the record you are looking for in the list.



You can use the ? button as a separator between the Last Name and First Name.

Start entering the Last Name, and after you've entered a few letters, tap the ? button, and then start entering the First Name.

For Alice Gold, enter:
[ghi] [mno] [?] [abc] [jkl]



You can use the ? button as a separator between the First Name and Last Name.



Start entering the First Name, and after you've entered a few letters, tap the ? button, and then start entering the Last Name:

For Alice Gold, enter:
[abc] [jkl] [?] [ghi] [mno]

Scroll up and down the list by using the Up and Down keys on the 5-way navigator, or tap the Next and Prev buttons.

To open the selected record, press the center button on the 5-way navigator, or tap the View button, or tap the name.

If the letters you enter uniquely identify a record, the record will be opened automatically.

Tap the  button to return to Smart Lookup. Tap the  button and keep it pressed until you hear a beep (about 1/2 second), to exit iQcontacts. If you exit iQcontacts when you're in Stylus Free lookup mode, the next time you run iQcontacts, it will open up in Stylus Free lookup mode.

The buttons that are used to lookup names can be on either side of the screen. To change their position, use the "Keypad on Right Side" checkbox in the iQcontacts Preferences. See iQcontacts Preferences for further details.

Record View

To select a record in Lookup View, scroll up or down with the 5-way navigator. Press the center button of the 5 way navigator, and the selected record will be displayed in Record View.

You can also tap any record in Lookup View, and it will be displayed in

Record View.






On the title bar of Record View, the Recent List checkbox is displayed. If the record is already in the recent list, the checkbox will be checked. If the record is not in the Recent List, it will be checked only if the Auto Insert into Recent List preference is checked.



If you are in the Stylus Free lookup mode, and you open a record, the buttons on the screen are larger, to make it convenient for you to tap with your finger.

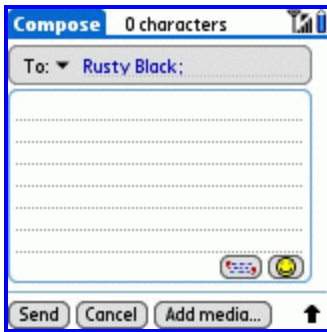
Once the record is opened in Record View, you can check or uncheck the Recent List checkbox. The status of the Recent List checkbox when Record View is exited, will determine whether the number will be inserted into the Recent List or not. See Recent Number Management for further details.

If a reminder has been set for that record, the Alarm Clock symbol  will be shown in the bottom right corner of the screen. The details of the Reminder can be viewed and modified by tapping the  button. In order to set a reminder, tap the  button. See Reminders for further details.



If you are using a Treo / Centro, or your Palm organizer is configured for dialing a phone, any phone number from the record that is being displayed, can be selected and then dialed by tapping the Dial button or pressing the Center button on the 5-way navigator.

Or, to send a Text Message, tap the **SMS** button.



Once you have tapped the SMS button, the Built-in Messaging application will open, and the name of the selected contact will be filled in.

All you have to do is write your message and send it.

This allows you to use iQcontacts Smart Lookup for finding you Contact.

Touch Tone Dialing


It is possible to use iQcontacts to dial phone numbers on any Touch Tone phone. This allows you to easily dial a number after you have looked it up. All you need to do is hold the speaker of the Palm device next to the microphone of the phone, and tap the Tone button. There is a delay of about 2 seconds before Touch Tone dialing starts. Four clicks will be heard, and then the dialing will start. This will give you time to make sure that your Palm device is next to the phone's headset. Commas can be added to the dialing string. Each comma will pause the dialing for a second

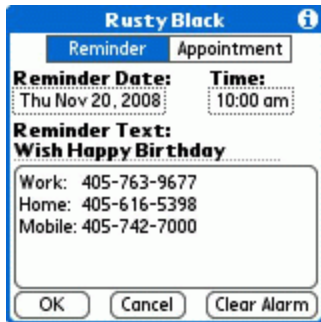
Reminders

iQcontacts Reminders allow you to set a reminder for any record your Contacts. You will be able to specify the time and date for the reminder, as well as the reminder text. At the specified time and date, an alarm will be sounded, and the name, reminder text, and phone numbers of the specified record will be displayed.

If you don't respond to the alarm, it will be repeated based on the iQcontacts preference settings. See iQcontacts Preferences for further details.

Setting a Reminder

Select the desired record in Lookup View and open it in Record View. Tap the  button to open the Reminder screen.



The record's name will be displayed in the title bar of the Reminder screen. The Reminder pushbutton will be selected.


On this screen you will be able to set the Reminder Date and Time, as well as the Reminder Text. The phone numbers of the record are displayed in a button in the bottom half of the screen.

If there is no reminder set for the record, today's date will be displayed. The time will be set to 5 - 10 minutes later than the current time (it will be rounded to a 5 minute interval). If there is a reminder set for the record, the date and time that are shown when you open the Reminder screen, are the date and time that were set for that reminder.

If you enter text in the Reminder Text field, this text will be displayed when the Reminder alarm is sounded.


Tapping the big button where the phone numbers are displayed, will show the complete record.

Tapping the Cancel button will return you to Record View without setting or clearing the Reminder for that record. Tapping the Clear Alarm button will set the Reminder date and time to None. Tapping the OK button will set the Reminder based on the Reminder Date and Time. If the Reminder Date and Time are None and the selected record previously had a Reminder set, the Reminder will be cleared.


NOTE: When you open a record in Record View, if there is a reminder set for that record, the alarm icon  will be displayed in the bottom right corner of the screen, indicating that a reminder has been set for that record.

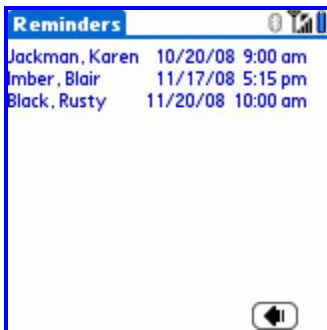
Viewing Reminders



In order to see a list of all the Reminders that are set, tap the  button in the Lookup View screen. You will see a list of all of the Reminders and their date and time.



Another way to see the Reminder list, is to select View Reminders from the Record menu. This is useful in Stylus Free lookup mode, when there is no  button.



The list will be sorted chronologically with the next reminder at the top of the list. Selecting a record will open the Reminder screen for that record so that you can modify or clear the reminder.

When a Reminder is Triggered

When the time for a reminder is reached, an alarm will be sounded, and the name and phone numbers of the record will be displayed along with the Reminder Text that was set for this reminder.



If your Palm organizer is configured for dialing a phone, any phone number from the record that is being displayed, can be dialed by tapping the Dial button.

You can see the whole record by tapping the button where the phone numbers are displayed, or by tapping the View Record button.



You will have the choice to dial any phone number from the record that is being displayed.



By tapping the Snooze button, you can Snooze for the default snooze time set in the iQcontacts Preferences screen. To snooze for a different amount of time, tap the Snooze for dropdown list, and select the amount of time.

You can re-schedule the alarm by tapping the date or time selectors under Next Scheduled Alarm.



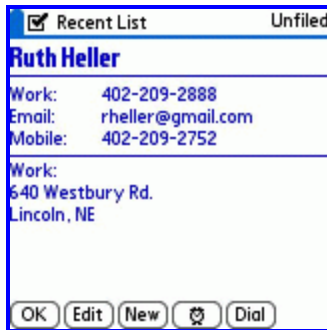
If you tap the Snooze button, the alarm will be triggered again after the snooze time has elapsed. Once the "Next Scheduled Alarm" has a time and date, the alarm will be set when you tap either the Snooze or OK button. If you leave the Next Scheduled Alarm date and time set to None, and tap the OK button, the Reminder will be cleared.

Reminder Preferences


See iQcontacts Preferences for further details about settings related to Reminders.

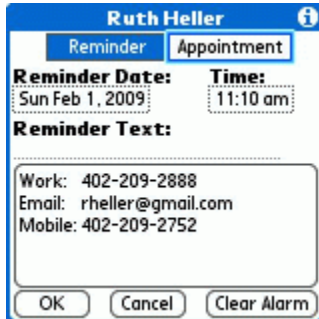
Insert an Event into the Calendar

You can insert an event into the Calendar from within iQcontacts. You will be able to specify the time and date for the appointment, and a virtual link to the current record will be created automatically.



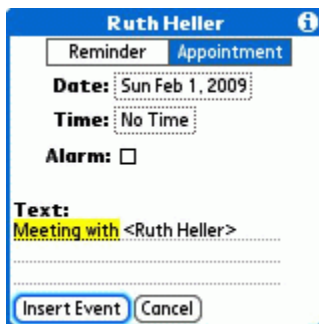
Select the desired record in Lookup View and open it in Record View.

Tap the  button to open the Reminder screen.



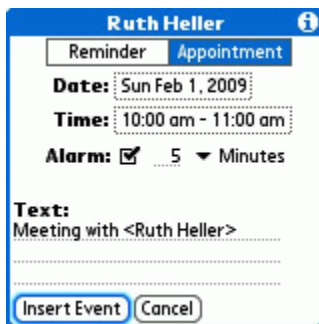
The record's name will be displayed in the title bar, and the Reminder pushbutton will be selected.

If you want to insert an event, tap the Appointment pushbutton.



On the Appointment screen you will be able to set the Date, Time, Alarm, and the Text description for the appointment.

The text is set to: Meeting with <Record Name> where Meeting with is highlighted, and <Record Name> is a Virtual Link to the record that you are viewing.



After you have set the date and time for the appointment, you can modify the text that is highlighted, or add text after the Virtual Link.

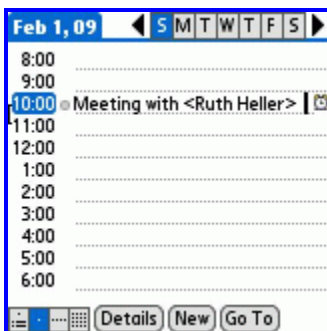
Tap the Insert Event button in order to actually insert the event into the Calendar. Tap the Cancel button to return to Record View.



After inserting the event, you get a confirmation screen.

Tap the Continue button to remain in iQcontacts. Tap the Goto Calendar button to open the Calendar with the new event selected.

Note: If you are using Agendus or DateBk5/6, they will be launched when you tap Goto Calendar.



The Calendar will show the event as specified in iQcontacts.

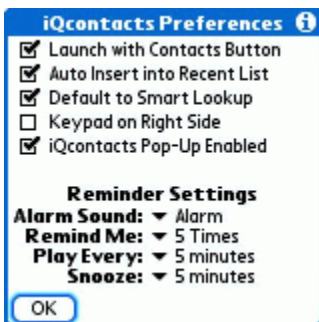
You can place the cursor anywhere in the field with the Virtual Link, and when you pop-up iQcontacts, the record will be opened immediately.

See Virtual Links to the Address Book for more details.

Pop-Up Activation and Virtual Links

You can pop-up iQcontacts without exiting most applications. This allows you to access iQcontacts while you are running another application. Once you have found the information you were looking for, you can continue where you left off.

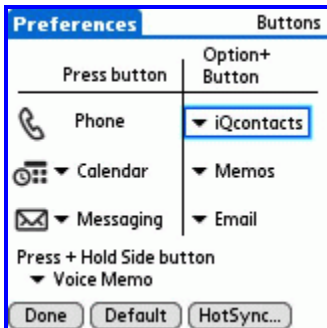
Using Virtual Links, you can pop-up iQcontacts and view a specific record based on the text in the application that you are running.



In order to enable the pop-up capability of iQcontacts, you must check the **iQcontacts Pop-Up Enabled** checkbox, in the iQcontacts Preferences. See iQcontacts Preferences for further details.

Popping-Up iQcontacts

To Pop-Up iQcontacts on any Treo or Centro (except the Treo 650), press the OPTION button (to the left of the z key on the keyboard) follow by the green send button.



To Pop-Up iQcontacts on a Treo 650, first you need to map the Option Button combined with one of the application buttons to iQcontacts.

Tap the **Prefs** icon, select the **Buttons** category. On the right side of the screen, select the button that you want to be used for popping-up iQcontacts. Then use that combination to Pop-Up iQcontacts.



In order to pop-up iQcontacts on Palm devices that use graffiti, you must do a Command Stroke. The Command Stroke is a stroke from the bottom left corner of the Graffiti area, to the top right corner. Tap the iQcontacts icon that will be displayed on the Command Bar. Usually it will be the left-most icon. You can pop-up the Command Bar from any screen that has a menu.

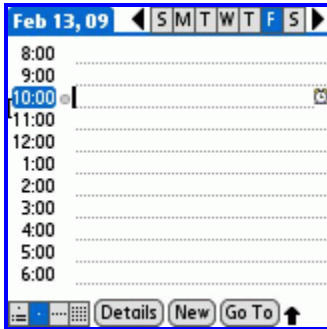
Pop-up Activation

This feature allows you to look up a phone number without leaving the application that you are currently running. When you view a record, you can tap the Dial button, to dial a number. Once you have found the information you were looking for, you will continue where you left off in the application you were running.



When you are viewing iQcontacts after it has been popped-up, the iQcontacts icon will be displayed in the title bar. You can look up records in the same way that you would when you run iQcontacts, however, menus are not available. Once you tap the **back arrow** button, you will return to the original application.

Virtual Links to the Calendar



Using iQcontacts pop-up capability, you can create a Virtual Link to a record in your contacts application from within any text field, in any application.

The easiest way to create a virtual link is to place the cursor in an empty field, and then pop-up iQcontacts.



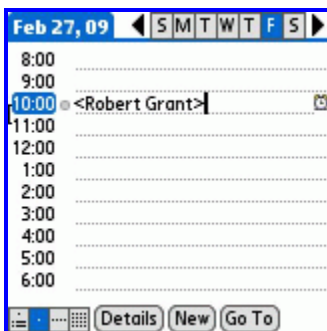
This will display the Lookup View of iQcontacts. You can look up a record and select it, so that you see the Record View.

Enter the name (or company name), and select the record.

For example, let's create a virtual link in the Calendar for Robert Grant.



When you tap the **Insert** button, the record will be closed, and you will return to the original application.



When you return to the original application, the name will be inserted into the field, and will be enclosed in angle brackets. This is a Virtual Link.

Once there is a Virtual Link, you can place the cursor anywhere in that field, and pop-up iQcontacts.



When you pop-up iQcontacts, that record will be opened immediately, and you can choose to Edit the record, or if your Palm is configured for dialing, you can dial the number immediately.

When you tap the OK button to exit iQcontacts, you will be returned to the application that was running when you popped up iQcontacts, but you might not be returned to the same place.

Once you have created a Virtual Link, you can add other text to the field outside the angle brackets. You will still be able to open the Virtual Link by placing the cursor anywhere in the field and popping up iQcontacts.

Recent Number Management

iQcontacts keeps track of phone numbers that you recently looked up. Each time you run iQcontacts, up to ten recent numbers are displayed at the beginning of the list. This makes it very easy to find the phone number of someone who you recently looked up.

There can be up to 10 names in the recent number list. When the list is full and a new record is inserted, the last record in the list will no longer be in the recent number list, and the new number will be inserted at the beginning of the list.

NOTE: You will not see the list of Recent Numbers if you have a category selected. You will only see the list when you are viewing All categories.



Recent Numbers are shown in a different color than names and numbers that are not in the Recent Number list. See Color Scheme Management for further details. If your device doesn't support color, or if you un-check the Use Color checkbox, Recent Numbers will be underlined.

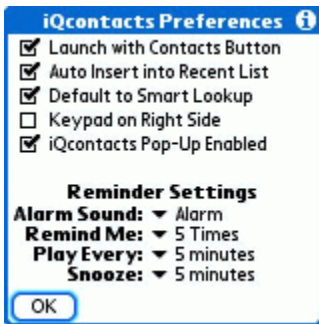


If you do not see the recent number list, you can view it by tapping the Clear button.



When you open a record for viewing, you can decide if you want the record to be inserted into the Recent Number List.

To insert a number into the Recent Number List, make sure the Recent List checkbox is checked. If you do not want the record to be in the recent number list, make sure that the Recent List checkbox is not checked.



The iQcontacts Preferences allow you to determine the default setting of the Recent List checkbox in Record View.

See iQcontacts Preferences for further details.

View New Records


To see a list of your newly entered or beamed Contact records, from the Lookup View, tap the top left corner of the screen and select **View New Records** from the **Record** menu.



The title of the screen will be New Records. The records will be shown in the reverse order that they were added to the Contacts.

In this view you will only see records that have been added to Contacts since you performed a Hard Reset on the device (or switched to a new device).

Single Button Review of Recent Numbers

On non-Smartphone devices, if you are in Lookup View, and you press the Contacts  button, the most recent record (the one at the top of the list) will be opened, and displayed in Record View.

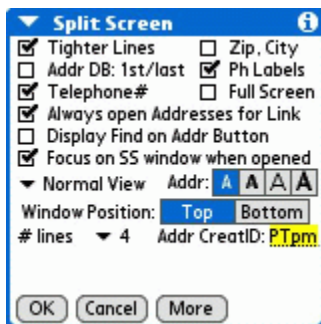
For Treo and Centro devices, you will need to assign in the Prefs/Buttons a button for iQcontacts.

Pressing the (assigned) Contacts button again will advance you through the list of recent numbers. If you press the Contacts button while viewing the last record in the Recent Number List, the first record will be displayed again. Using this technique, you can conveniently view all of the recent number records.

In order to use this feature, you must have the Contacts button set to launch iQcontacts. See iQcontacts Preferences for further details.

DateBk5/6 Integration

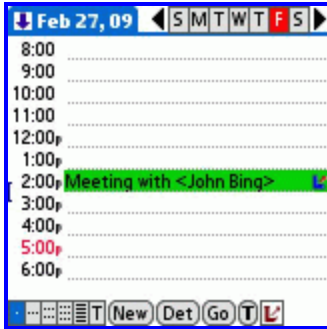
Features have been added in both iQcontacts and DateBk5/6 to integrate the two applications seamlessly.



In order for the integration to work, InDateBk5/6: select Preferences from the Options menu, tap the Split tab/Split Screen. Enter **PTpm** in the Addr CreatID field (at the bottom of the screen).



When Setting an Appointment in iQcontacts, and DateBk5/6 is installed, you will be able to select the category of the event to be inserted. If the category of the selected record exists in DateBk5/6, that category will be the default selection for the event. If the category doesn't exist in DateBk5/6, then Unfiled will be the default selection. The dropdown can be tapped to select a different category.



The inserted event will automatically contain a DateBk5 Link.

If you tap the **Link** icon of the event, it will open the record in iQcontacts. You can choose to Edit the record, or if your Palm is configured for dialing, you can dial the number immediately.

In DateBk5/6, tap the Link button to pop-up iQcontacts. You can then use iQcontacts Smart Lookup or Stylus Free lookup to select the record to be linked to. Once you lookup the record, and open it, tap the Insert button, and you will be returned to DateBk5/6 in order to complete the creation of the link.

In DateBk5/6, tap the New button, and select Address from the list. This will open a new record in iQcontacts. After you finish creating the new record, tap the Done button, you will return to DateBk5/6.

In DateBk5/6, tap the New button, and select Call/Action from the list. This will pop-up iQcontacts. You can then use iQcontacts Smart Lookup or Stylus Free lookup to select a record. Tap the Insert button on the record, in order to use the selected record for the Call/Action.

In DateBk5/6, select Find Items linking to this from the Record menu. If nothing is selected in the split-screen window, and the insert pointer is not in an Appointment or Todo, then iQcontacts will be popped up, and can be used to lookup and select the item to be searched for.

If iQcontacts is launched when DateBk5/6 is running, and you exit iQcontacts by pressing the OK button, you will return to DateBk5/6 in the place that you were when you launched iQcontacts. If you exit iQcontacts by pressing the Calendar button to launch DateBk5/6, you will also return to DateBk5/6 where you left off.

In DateBk5/6, you can pop-up iQcontacts, by tapping the New button, and selecting Launch App. from the list. In order for this to work, select View Display Options from the Options menu, and enter PTpm in the App CreatID field.

User Defined Search

A User Defined Search allows you to look up contacts using fields **other** than First Name, Last Name and Company Name. **You** specify which fields will be used for the Lookup.

In addition, with a User Defined Search you can create a filter that will display only the contacts that match the filter definition. Once you see the filtered contacts, your lookup will be performed only on those contacts. This can be thought of as a “super category”.

There are four User Defined Search entries already created when you install iQcontacts.



From the Lookup View, tap the Smart button next to the Lookup field, and select ***Define Search*** from the list.



The four existing User Defined Searches are listed.

To create a new Search, tap the **New** button.



On this form you specify the **name** of the Search Definition.

Usually you would specify either the Lookup Fields or the Filter Definitions.

For advanced search definitions, you can specify both.

The default for the **Lookup fields** is **Smart**. This indicates that the lookup will be done using the Smart Lookup fields, which are: First Name, Last Name, Company Name, and combinations of First and Last.

In order to create a search definition that uses other fields as the lookup fields, tap the **Smart** button.

In the **Select Fields** screen, you select which field(s) to search for when you enter text in the Lookup field.

Note: If no fields are selected, the Smart Lookup fields will be used.

Tap each field you want to select.

You can tap **All** to select all of the fields, and you can tap **Clear** to unselect all of the fields.

After you have selected the desired fields, tap **Done** to return to the Search Definition form.

If one or more fields have been selected, the button next to the **Lookup Fields** label will change from **Smart** to **View**.

Tapping the View button will display the fields that are selected.

Another use of the User Defined Search is to create a filter that will show only the contacts that match the **filter definition**. Once you see the filtered contacts, your lookup will be performed only on those contacts. This can be thought of as a “super category”.

A Filter Definition is made up of three parts:

- Fields selection
- Condition (can only be **Contains**)
- Text

Defining these, will allow you to specify what text will be looked for in what fields.

In order to specify the fields that are used for the Filter Definition, tap the **None** button under Fields

In the **Select Fields** screen, you select which field(s) will be searched to match the filter text. At least one field must be selected.

You can tap **All** to select all of the fields, and you can tap **Clear** to unselect all of the fields.

After you have selected the desired fields, tap **Done** to return to the Search Definition form.

Once you have specified the fields, the button under the **Fields** label will change from **None** to **View**.

Tapping the **View** button will display the fields that are selected.

The Condition is currently always set to **Contains**, and cannot be changed at this time.

Tap the **Enter Text** button in order to specify the Filter Text. This is the text that will be looked for in the field(s) that are selected.

You can enter up to five different texts to be used as part of the filter, and you can specify **Match All** or **Match Any**.

If you choose Match All, then one of the selected fields must match **all** of the texts specified.



If you choose Match Any, then one field must match **any** of the specified texts.



You may not want the Filter Text to be preset. You can create a filter definition that will allow you to specify the filter text whenever you choose that filter.

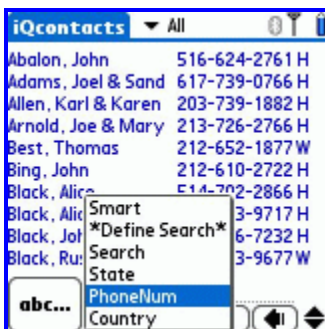
This is done by having a “?” as the first character in the text field, followed by the text that will be used to prompt you what to enter when that User Defined Search is selected.

User Defined Search Examples



Tap the **Smart** button and you will see four User Defined Searches:

- Country
- PhoneNum
- State
- Search



Select **PhoneNum** and put the keyboard in number lock.



As you enter numbers, any contact that matches those numbers in **any** of its phone numbers will be displayed (the number might not be displayed on the screen).



Notice that the number shown for Rich Morgan does not contain "312".



Once the record is selected, the matching text will be highlighted.

In this case "312" was not in the primary number that is displayed.



To see how PhoneNum was defined, from the Lookup View, tap the button (PhoneNum or Smart) next to the Lookup field, and select ***Define Search*** from the list.



Select **PhoneNum**, and tap the **Edit** button.



To view the **Lookup Fields** that have been defined for PhoneNum, tap the **View** button.

Note: For this User Defined Search, there is no Filter Definition.



The 7 fields that contain phone numbers are selected. This means these 7 fields will be compared with what is entered in the Lookup field (instead of First Name, Last Name, and Company name).

Tap the **Done** button. Go back by tapping the **Cancel** button, and the **OK** button.

When any of the Phone Number fields is specified in the Lookup field, all punctuation characters in the field will be ignored. To find a phone number, just enter the digits of the phone number without any spaces, dashes, parentheses or periods.

The following User Defined Search demonstrates how to use a filter in your search definition.



From Lookup View, tap the button (PhoneNum or Smart) next to the Lookup field, and select **State**.



Enter a state and tap the **OK** button.



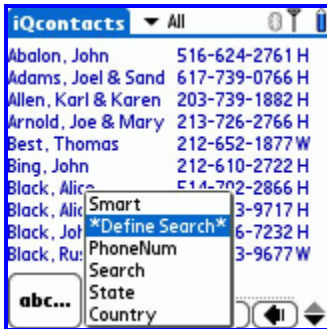
A list, containing only the Contacts in that state will be displayed.

This can be thought of a “category” containing all the contacts in that state.



Now you can do a search on this filtered list.

If you enter the letter “a”, then a list of all the contacts in the specified state, that have the first and last names and company name, starting with an “a” will be displayed.



To see how State was defined, from the Lookup View, tap the button (PhoneNum or Smart) next to the Lookup field, and select ***Define Search*** from the list.

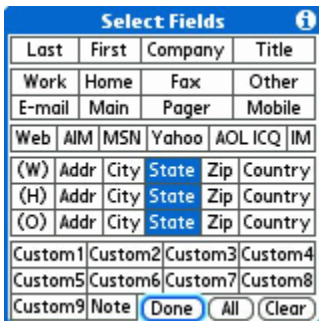


Select **State** and tap the **Edit** button.



For State, the Lookup Fields are left at their default definition of Smart. This means that the Lookup will be done using First, Last and Company Names.

To see the fields that are used for the Filter Definition, tap the **View** button under Fields.



For this filter, the three State fields are selected.

This filter will compare the filter text with the contents of each of the State fields.

Tap the **Done** button.



To see the filter text, tap the **View Text** button under Text.

You will then see the filter text that is being used for this User Defined Search.



The filter text is a question mark, followed by the text “Enter State:”.

The question mark indicates that the user will be prompted to enter the filter text, when this filter is selected.

“Enter State:” is the prompt that will be displayed to the user.

This technique allows the creation of flexible filters, where the filter text is specified each time the User Defined Search is used.

Dialing Profiles

You can create multiple Dialing Profiles. When you dial via iQcontacts the selected Dialing Profile will be used. This will insure that the phone number is dialed correctly based on the profile that you have created. This will take into account your local country code and area code, your international access code (what you need to dial in order to dial an international call), whether you need to always dial the area code, and any long distance or local prefixes that you need to dial.

There are several parts to the Dialing Profiles:

1. Dialing Preferences
2. Profile Editing
3. Country Definition

Each one will be described in its own section.

Dialing Preferences

Run iQcontacts, tap the top left corner of the screen. From the Options menu, select **Dialing Profiles**.

On the Dialing Preferences Screen you'll see the following:

- A [Phone Dialing] label with a Dialing Profile checkbox below it. If you check the checkbox, you'll see a dropdown list – initially it will be empty. In the future, if you check the checkbox, and there are no profiles, you'll get a message telling you to define a profile. Once you have one or more profiles defined, if you check the Dialing Profile checkbox, you'll be able to select one of the profiles. That is the profile that will be used for dialing. In most cases this will be dialing a cell phone – either from a Treo device or from another Palm device that uses Bluetooth to dial a Bluetooth enabled cell phone. It can also be used to dial a cell phone via Infrared. Keep this in mind when you define your profiles. When you define your

profiles, keep this in mind. If you are going to use iQcontacts for dialing your cell phone, you'll need to create an appropriate profile, and select it for Phone Dialing.

If you don't check the checkbox, then no dialing profile will be used, and then the number will be dialed exactly as it is in Contacts.

- A [Touch Tone Dialing] label with a Dialing Profile checkbox below it. This will work exactly the same way as the Phone Dialing profile, but the profile that you select here will be used when using your Palm device to dial a land line phone using touch tones. You need to hold your Palm up to the handset of the phone in order for this to work. This will work for the Treo 650, or any Palm device that supports sound. If you want to use touch tone dialing, you'll need to define an appropriate profile. It will probably be different than the Phone Dialing profile – but it could be the same. If you're going to use iQcontacts for Touch-Tone dialing, you'll need to create the an appropriate profile, and select it for Touch Tone Dialing.

- A label: [Default Country Code for Area Codes Starting with:], followed by two fields: [0] and [1 – 9]. These two fields are used in order to determine the country code for a phone number that has been specified without a country code. Most likely you didn't enter all of your phone numbers with country codes, especially the ones that are in your home country. However, if you travel overseas, and you want to call someone in your home country, you'll need to add the country code to the number. These fields will let you specify what country codes to associate with numbers that don't have a country code specified. Make sure that you specify values for these fields. In order for iQcontacts to determine the country code of a number in your contacts, the Country Code must be preceded by a '+' character. You will be able to specify two different country codes – one for numbers whose area code begins with 0 (many European Countries have their area codes starting with a 0), and one for numbers whose area codes don't begin with 0 (they can begin with any other digit, 1-9). The country code for the 1-9 would most likely (but not necessarily) be 1, which is the country code for the United States, Canada, and other countries using the North American Numbering Plan. For the area codes beginning with 0, specify the country code for the country whose area code starts with 0, and you might have many numbers for that country which don't have a country code specified.

Four buttons on the bottom: {Save}, {Cancel}, {Profiles}, {Countries}

{Save}: Save your current Dialing Prefs and return to the main screen.

{Cancel}: Return to the main screen without saving any changes that have been made.

{Profiles}: Open the Edit Dialing Profiles screen. On this screen you'll see a list of existing profiles. You can edit the existing profiles, delete existing profiles, and create new profiles.

{Countries}: Open the Edit Country Definitions Screen. On this screen you'll see a list of existing Country Definitions. You can edit existing definitions, delete existing definitions, and create new definitions.

Profile Editing

Open the Edit Dialing Profiles screen by tapping the {Profiles} button on the Dialing Preferences screen. On this screen you'll see a list of existing profiles. You can {Edit} the existing profiles, {Delete} existing profiles, and create {New} profiles. To delete a profile, select the profile that you want to delete, and tap the {Delete} button. You will not be allowed to delete a profile that is currently being used. To edit a profile, select the profile, and tap the {Edit} button. To create a new Profile tap the {New} button.

When you choose to edit a profile or create a new profile you'll be on the Edit Dialing Profile screen. On this screen are the following fields:

[Profile] – the name of the profile

[Country] – the country where you will use this profile

[Country Code] – the country code of the country where you will use this profile.

[Area Code] – the area code where you will use this profile

[Local Prefix] – this prefix if specified will be dialed before any local number (i.e. a number in the same country code and area code). There are some places where a prefix must be dialed before dialing a local call. This could also be used for Touch Tone dialing behind a PBX. If a delay is needed, you should enter one or more commas. Each comma will cause a delay of about 1/2 second.

[Long Distance Prefix] – this prefix if specified will be dialed before any long distance number (i.e. a number in the same country code, but a different area code). In many cities in the United States, a 1 is needed before dialing a long distance number. This could also be used for Touch Tone dialing behind a PBX.

[International Prefix] – this prefix will be dialed before the country code for a number that is in a different country.

The [Always Dial Area Code] checkbox should be checked if you always need to dial an area code, even for a call that is in the same area code that you are calling from.

The {Save} button will save the profile and any changes that were made and return you to the Dialing Preferences screen.

The [Cancel] button will cancel any changes that you made, and return you to the Edit Dialing Profiles screen.

Country Definition

Open the Edit Country Definitions screen by tapping the {Countries} button on the Dialing Preferences screen. On this screen you'll see a list of existing Country Definitions. You can {Edit} the existing definitions, {Delete} existing definitions, and create {New} definitions. To delete a Country Definition, select the country that you want to delete, and tap the {Delete} button. To edit a Country Definition, select the country, and tap the {Edit} button. To create a new Country Definition tap the {New} button.

When you choose to edit a Country Definition or create a new Country Definition you'll be on the Edit Country Definition screen. On this screen are the following fields:

[Country]

The country that you are defining

[Country Code]

The country code for that country

[Area Code Prefix]

The area code prefix for that country. The area code prefix is a number that is dialed before the area code when dialing within a country, but not dialed when calling internationally. In many European countries this is a "0". For instance if you call the London from outside of London, you'd need to dial the country code 44, and then the area code 20. However, if you were calling London from a city in the UK that has a different area code than London, you'd need to dial 020 as the area code. So for the UK the area code prefix would be 0. This is the case for many European countries.

The {Save} button will save the Country Definition and any changes that were made and return you to the Dialing Preferences screen.

The [Cancel] button will cancel any changes that you made, and return

you to the Edit Country Definitions screen.

Using Dialing Profiles

If you are using a Treo or you are using your Palm device to dial a BlueTooth enabled cell phone, set up a dialing profile, check the Phone Dialing checkbox, and select that profile for Phone Dialing.

If you are using your Palm device to do touch tone dialing, set up a profile for Touch Tone dialing, check the Touch Tone Dialing checkbox, and select the profile for Touch Tone Dialing.

In the Dialing Preferences screen, make sure that you have the necessary dialing preferences enabled, and selected. Also, make sure to specify the default Country and Country Code.

Make sure to set up Country Definitions for any country that you expect to call from your Palm device.

Once you've done that, you can begin to dial using Dialing Profiles.

The Dialing Form has changed a little. There are now two fields that contain numbers that can be dialed. One for Cell phone dialing, and one for touch tone dialing. Since there can be different profiles for each one, the number to be dialed can be different. The fields will be labeled Dial (corresponding to the Dial button), and Tone (corresponding to the Tone button). Each label will be followed by the name of the Dialing Profile that was assigned.

Specifying Phone Numbers

There are some limitations in terms of how phone numbers in your Contacts that will be interpreted in order to dial the numbers correctly using iQcontacts Dialing Profiles. The following guidelines will help you make sure that your phone numbers are specified properly. If they are not, just edit the numbers so that they meet these guidelines.

- Country Codes must be preceded immediately by a '+' (e.g. +1 for USA or +44 for UK). Otherwise the country code will not be interpreted correctly.

- If you specify a number with a Country Code and it is followed by an area code, iQcontacts will do it's best to determine whether a prefix needs to be added or removed from the area code. If the number is specified with the prefix in parentheses iQcontacts will recognize it, and handle it properly

(e.g. +44-(0)20-424-1234). When this number is dialed internationally, the '0' will not be dialed, but when it is dialed from within the country and a different area code, the '0' will be dialed. If you have numbers with the area code prefix not specified in parentheses, then in order for it to be handled properly, the country that is specified must have a Country Definition that specifies the Area Code Prefix.

- It is not always easy to determine whether a phone number includes an area code. If the "local number" is broken up into two tokens (two sets of digits with a separator between them – the separator can be any non-numeric and non-letter character, e.g. 456-3420 or 456 3420) then the area code will be interpreted correctly. However, if the "local" number is a single token (e.g., 4563420), then the area code may not be identified properly. If there are only two tokens in the number, if the first token is 3 digits or less, and the second token is six digits or more, the first token will be interpreted as the area code. Otherwise, it will be assumed to be a number without an area code.