

8

Working with Word

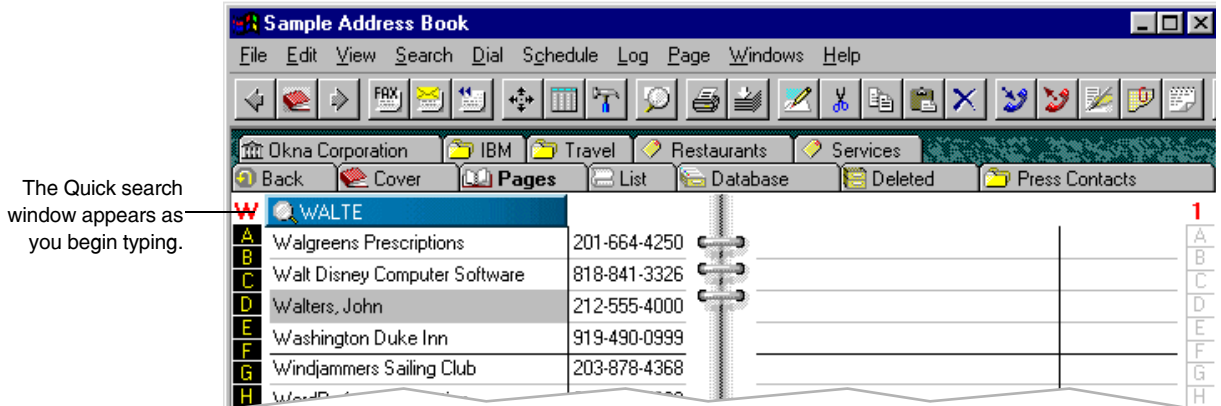
DeskTop Set's integration with Microsoft Word 6, 7, and 97 lets you create personalized correspondence with just a few mouse clicks. Simply select Address Book names and a document template, then DeskTop Set does the rest.

Integration in Action

The following example explains, step-by-step, how you can send a letter quickly and easily from DeskTop Set.

Imagine that you have been negotiating with John Walters for several weeks, and he has finally signed on as a client. The following steps, timed on a Pentium 100 with 16 MB of memory, show how you can fax him a welcome letter in just under a minute:

- Step 1 • Find John Walters in Address Book by typing the first few letters of his name:
(3 seconds)



This illustration shows Quick search in action. As you type the first few letters of a name, Address Book locates it instantly. In this case, typing *WALTE* finds John Walters.

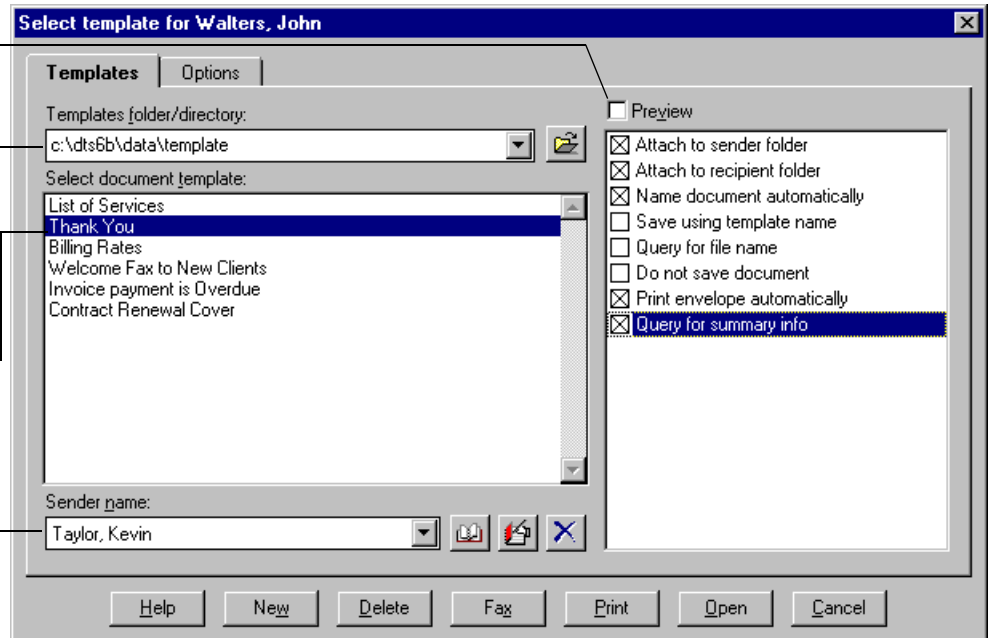
- Step 2 • From the Address Book menu, select the **File/Compose letter/ Select template...** command. The following window appears:
(3 seconds)

Click here to see an OLE preview of the document.

You can store Desktop Set-enabled Word templates anywhere on a network so you can share them with your colleagues.

Word templates are listed by recognizable titles rather than cryptic names.

An assistant can select which person he or she is preparing the letter for. This person is referred to as the *sender*.

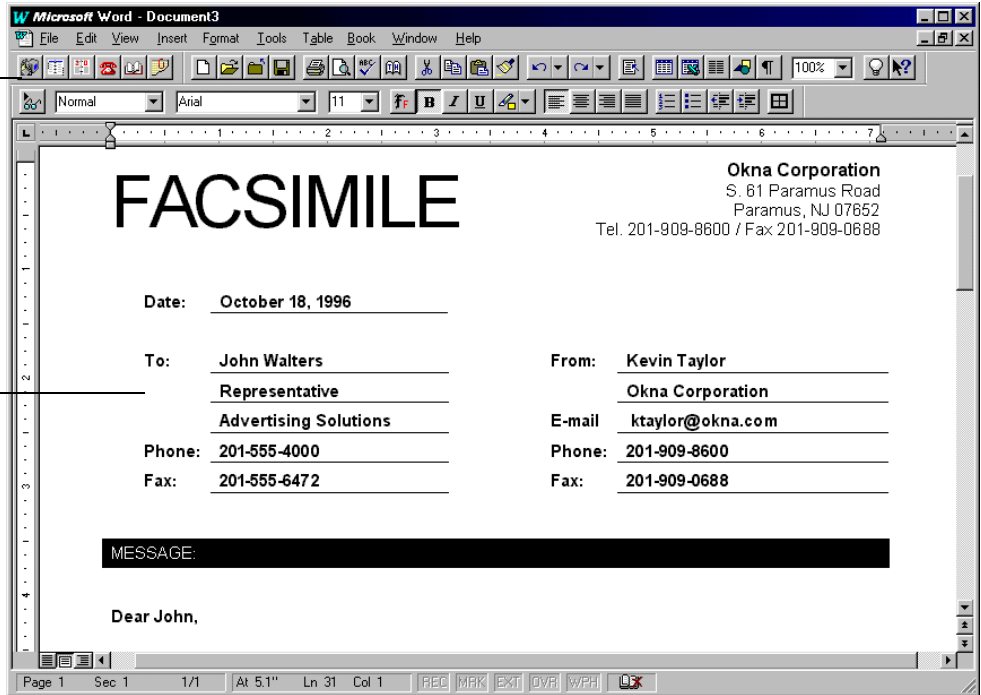


This window illustrates how you select a Word template to prepare a document. In the example above, Kevin Taylor is selected as the sender.

- Step 3** • Choose the *Welcome fax to new client* template, then click the **Open** button. Word starts and opens the new document. If needed, you can edit the text to add a personal touch:
- (16 seconds)

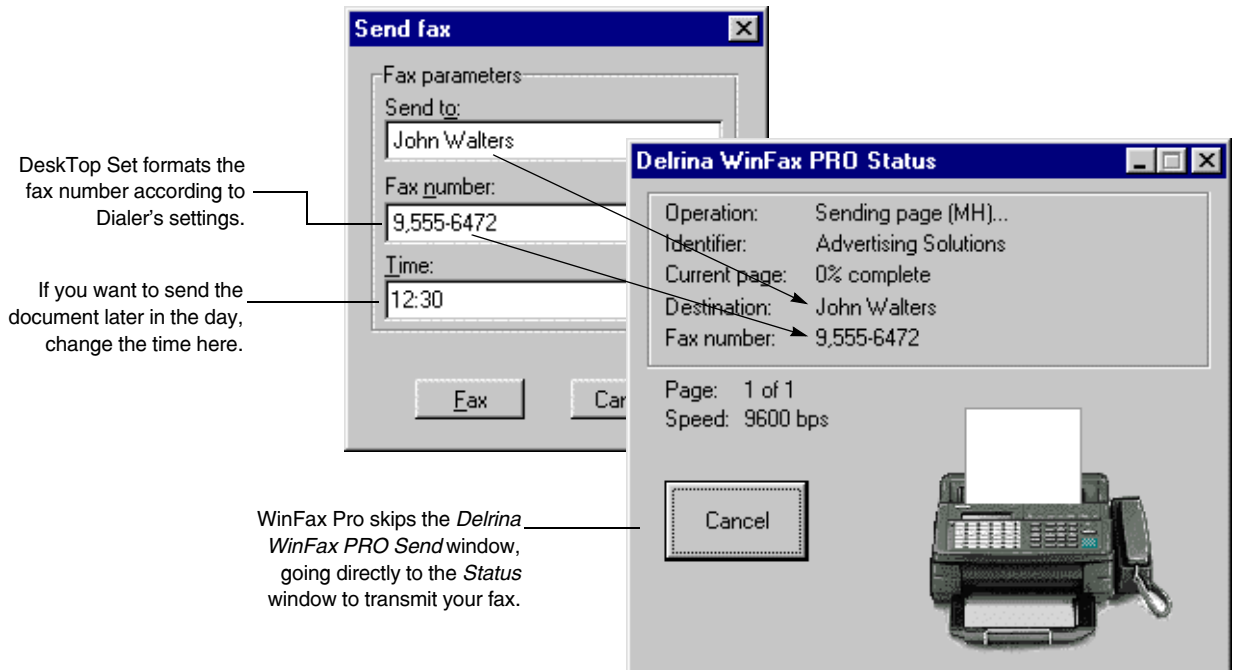
The DeskTop Set-enabled toolbar lets you fax and attach your document, open the recipient's Folder, or start any DeskTop Set module.

John Walters' and Kevin Taylor's information is automatically merged with the document. If necessary, you can edit the fax cover.



This illustration shows how a fax cover looks immediately after it is opened in Word. Name, company, and telephone merge fields are replaced by John Walters' and Kevin Taylor's information from Address Book.

- Step 4** • Click on the toolbar's *WinFax* button or select the **Book/Fax** command from Word's menu to send your document. The *Send fax* window appears.
- (5 seconds)



In the window on the left, DeskTop Set displays the information WinFax Pro needs to transmit your document. In this example, a phone number is formatted automatically and is shown as a local number, since John Walters and Kevin Taylor are in the same area code.

- Step 5** • Verify the recipient information, and click the **Fax** button. WinFax transmits your document.
- (3 seconds)

In less than a minute (thirty seconds in our example), you just faxed a personalized welcome letter to greet a new client. You can save additional time by clicking the **Fax** button in step three if you don't have to view or edit the document.

Please review the rest of the document for an in-depth description of DeskTop Set's document management system.

Preparing to use templates

Before you begin using DeskTop Set with MS Word, you will need to set up your templates. The following terms are used throughout this document, and you may want to review them before continuing.

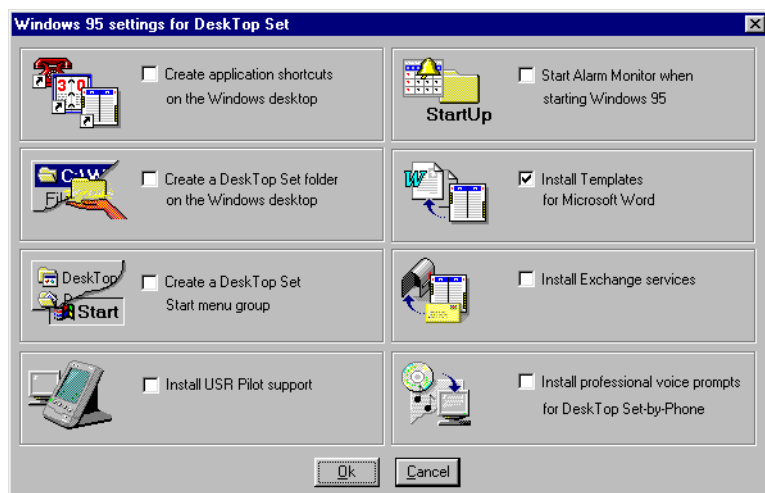
Term	Definition
Template	<p>(a.k.a. boilerplate). A template is a pre-designed form containing a combination of text and merge fields. Templates form the basis of new documents. (Standard Word templates use the extension *.dot).</p> <p>Documents created with DeskTop Set-enabled templates are merged with Address Book information to create personalized letters, faxes, or e-mail messages.</p>
Record	<p>A single person or company in DeskTop Set's database. Address Book records may contain any number of details about the entry, including their address, account number, phone numbers, etc.</p>
Folder	<p>Organizes record information into a concise format, similar to a manila folder in a filing cabinet. It holds contact information (such as names, addresses, and phone numbers), as well as phone log histories, notes, related computer files, calendar events, reminders, and more.</p>
Merge field	<p>These fields are inserted at various points in the template. When the template is used to create a letter, the merge fields are replaced by the person's actual information, so that each letter is customized. Merge fields appear in all capital letters, and begin and end with angle brackets (for example, <COMPANY>).</p>
Document merge	<p>The process during which a document's merge fields are replaced with information from an Address Book record. The resulting letter can be printed, faxed, or e-mailed.</p>
Mail merge	<p>A document merge using several Address book names. This process produces a personalized letter for each person. you can mail merge using your DeskTop Set Topics, Groups, and Categories.</p>
Sender	<p>The person sending the document. This person's name, address, phone, etc. can appear in the letter, the envelope's return address, the fax cover sheet, etc. The ability to associate different senders with different templates, or select another sender name on-the-fly, is essential for departmental assistants who may support several people at once.</p>
Recipient	<p>The person to whom the document is addressed. Any field from this person's record can be inserted into a template, as a merge field.</p>

Installing the DeskTop Set templates

You must install the DeskTop Set Word templates before using them. If you have already designed templates which you have been using with Word, it is also possible to make them DeskTop Set-aware, so you can access them through Address Book.

Windows 3.1 After you've installed DeskTop Set, run the *Macro Install* utility found in your DeskTop Set program group.

Windows 95 or NT Select **Start/Programs/DeskTop Set/Accessories/Windows 95 Setup...** You will see the following Window. This is the same screen shown at the end of the installation process. Select the option to "Install templates for Microsoft Word" and click **OK**.



The Windows 95 Setup window lets you install the Word templates.

Using the DeskTop Set Templates

We've included four templates with DeskTop Set: two fax templates, and two letter templates. They are useful for generating letters and faxes in a standard format, and for practicing with the templates before creating your own. You can also modify these templates to appear exactly as you need them to.

The following section will explain how to use these templates as they are. Once you are familiar with using the templates, the next section will explain how to customize them in any way you wish.

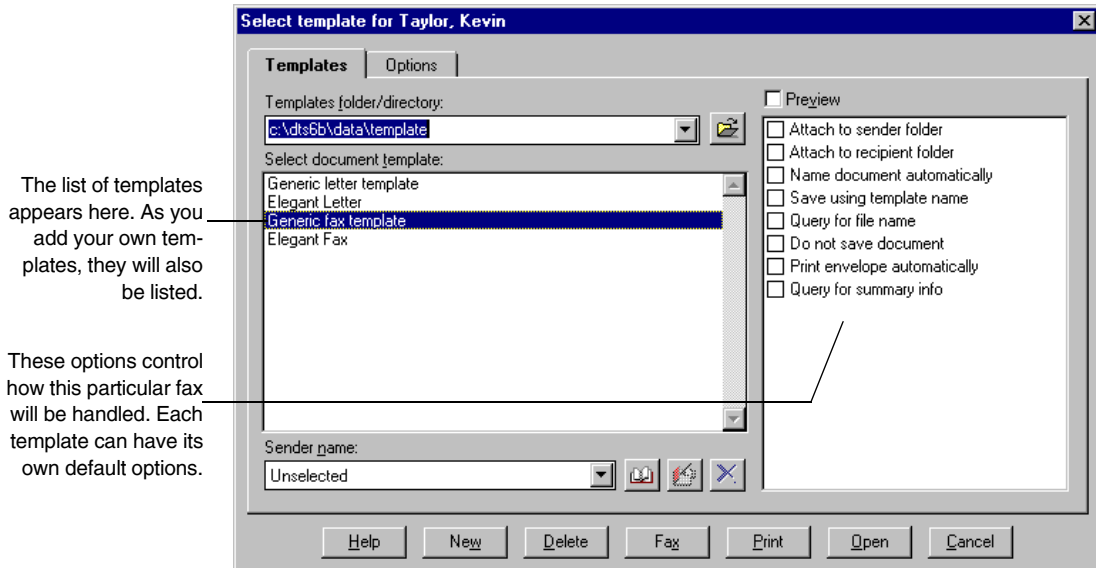
Selecting a template

You begin a letter or fax right from DeskTop Set. In fact, Word does not have to be running in order to use the templates - DeskTop Set will start Word automatically when you open the new letter or fax.

Each template also contains options that affect how its faxes or letters are named and saved, and which Address Book folders they are attached to. Each template has a set of default options, and you can also change the options for a particular letter or fax at the time you compose it.

To select a template:

- ◆ From Address Book, click on the person you wish to send a letter or fax to.
- ◆ Choose **File/Compose Letter/Select Template** from the menu.
- ◆ The *Select template* window appears:



- ◆ The **Select template** tab lets you choose the template to work with. You can click **Fax** or **Print** to create the fax or letter immediately, or click **Open** if you need to review the document or customize it further.

To automatically fax or print the document:

- ◆ Click the template you wish to use.
- ◆ Select a Sender Name from the list or, click the Address Book icon to select a sender (you will most likely want to select yourself, unless you are sending letters for more than one person).
- ◆ Click **Fax** or **Print**.

DeskTop Set will then open the template, merge the recipient's and sender's information into the document, and send it to the printer or WinFax, automatically.

To load the template in Word:

You may want to review or edit the document before sending it. To do this:

- ◆ Click the template you wish to use.
- ◆ Select a Sender Name from the list or, click the Address Book icon to select a sender (you will most likely want to select yourself, unless you are sending letters for more than one person).
- ◆ Click **Open**.

DeskTop Set will then start Word, open a new document based on the template you've chosen, and insert the appropriate recipient and sender information into the document. You can then make any necessary changes, or simply review the document, before printing or faxing it.

Changing template options

The options listed on the right side of the *Select template* window control how this particular document will be saved and attached to DeskTop Set.

It's very important to note that these options appear on both the **Template** tab, and the **Options** tab, as well. Any changes made on the **Template** tab will only affect this single document (in this case, this particular fax to Kevin Taylor). Changes made on the **Options** tab, however, will be saved, and applied to every fax created with this particular template.

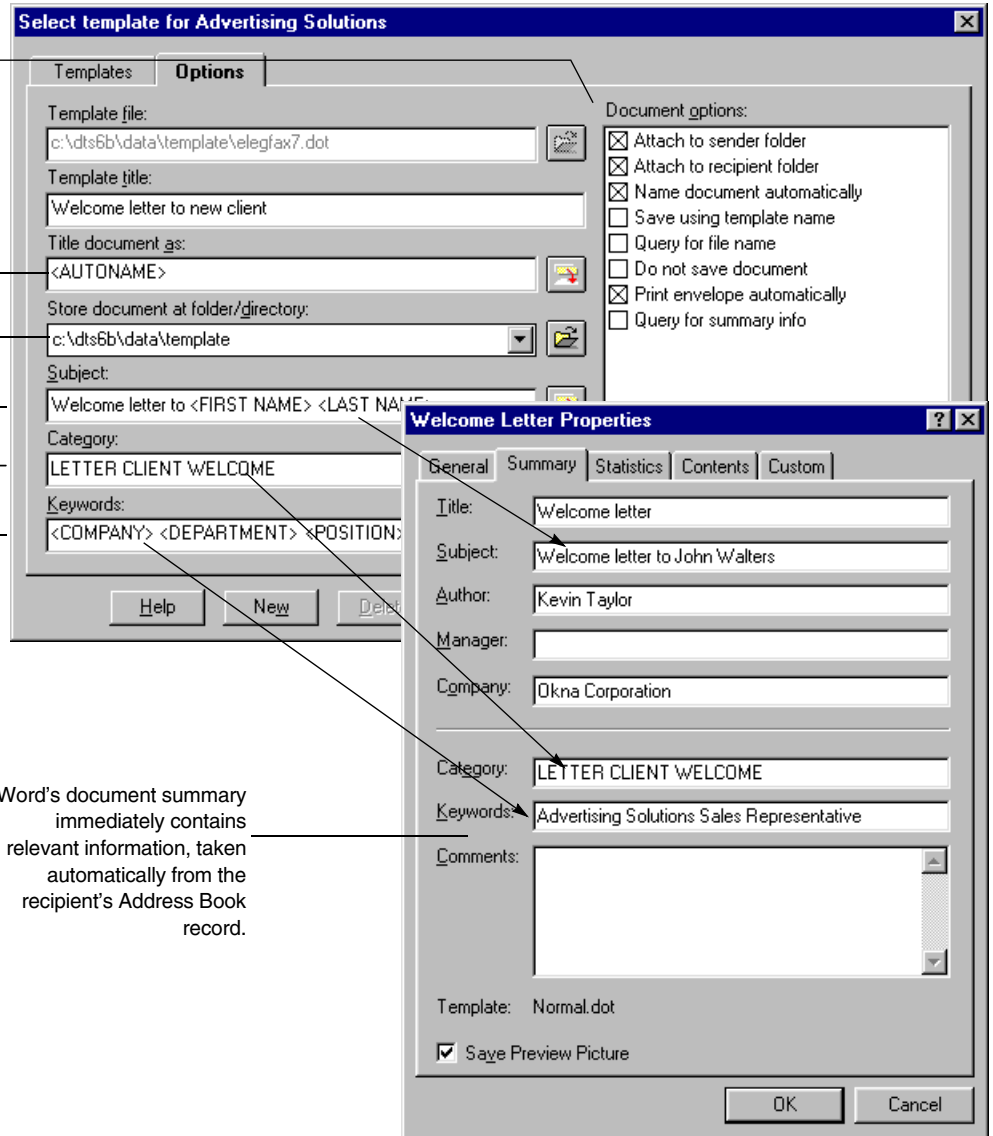
Please note that the options are the same on either tab; the difference is whether they are applied to the document you are creating at the moment, or to *all* the documents created with this particular template.

These options appear as defaults for all documents created with this template.

DeskTop Set can automatically name your document so you do not have to think of a cryptic title.

Documents are automatically saved to the directory shown here.

DeskTop Set uses this information to fill in Word's document summary automatically.



Word's document summary immediately contains relevant information, taken automatically from the recipient's Address Book record.

The top window contains default template options that affect how documents are named, saved, and filed. Information such as Subject, Keywords, and Category can be carried over to Word's document summary, on the bottom right (taken from Word 7.0 in this example).

Document Option	Description
Attach to sender folder	Assistants who prepare correspondence for several people and need to track documents by their senders should select this option.
Attach to recipient folder	To instantly locate all correspondence sent to a client, enable this option. You can then display all documents attached to the client's folder with a single click.
Name document automatically	This option saves time by creating a file name for you, based on the template name and recipient.
Save using template name	Let's assume that you are using a template called welcome.dot. This option saves the documents you create as welome1.doc, welcome2.doc, welcome3.doc, and so on.
Query for file name	This option lets you specify a file name each time you create a new document.
Do not save document	Use this option when you are doing a mail merge with numerous names, so Word does not save multiple copies of the same letter.
Print envelope automatically	Enable this option to print an addressed envelope after a letter using Address Book's printing system.
Query for summary information	This option opens Word's summary information window so you can review and edit the content.
General option	Description
Template file	This is the template's filename.
Template title	DeskTop Set uses the text you type here to list the template.
Title document as	Construct the text and keywords that DeskTop Set uses to automatically title documents created with this template.
Store document folder/directory	DeskTop Set can automatically save your documents in the directory you select here.
Subj., Category, and Keywords	The information you type here is used in Word's document summary, and to list your document in DeskTop Set.

Sending a fax

DeskTop Set works together with Microsoft Word 6, 7, or 97, and Delrina WinFax Pro 4, 7.x, or 8 to let you send faxes quickly and easily.

To prepare a fax:

- ◆ Highlight the fax recipient in Address Book.
- ◆ Select **File/Compose letter/Select template...** from the menu. The Select template window appears.
- ◆ Highlight the template you wish to use.
- ◆ Choose the fax sender from the *Sender name* drop-down list.

If the sender's name does not appear in the drop-down list:

- ◆ Choose *Select sender* from the list.
- ◆ Click the **Book** button to the right of the list.
- ◆ Select the fax sender from Address Book.
- ◆ Minimize Address Book's window to return to the *Select template* window.

If you do not need to edit the fax:

- ◆ Click the **Fax** button to send the fax.

To edit the fax:

- ◆ Click the **Open** button. The document opens in Microsoft Word.
- ◆ When you finish making changes, select the **Book/Fax** command from Word's menu to send the fax.

Sending a letter

You can use DeskTop Set to prepare and print letters with just a few clicks.

To prepare a letter:

- ◆ Highlight the letter's recipient in Address Book.
- ◆ Select **File/Compose letter/Select template...** from the menu. The *Select template* window appears.
- ◆ Highlight the template you wish to use.
- ◆ Choose the letter's sender from the *Sender name* drop-down list.

If the senders name does not appear in the drop-down list:

- ◆ Choose *Select sender* from the list.
- ◆ Click the **Book** button to the right of the list.
- ◆ Select the a sender from Address Book.
- ◆ Minimize Address Book's window to return to the *Select template* window.

To print an envelope with the letter:

- ◆ Make sure the *Preview* option is not selected.
- ◆ Select the “Print envelope automatically” option.

If you do not need to edit the letter:

- ◆ Click the **Print** button to print the letter.

If you selected to print an envelope, Address Books envelope printing utility appears automatically.

To edit the letter:

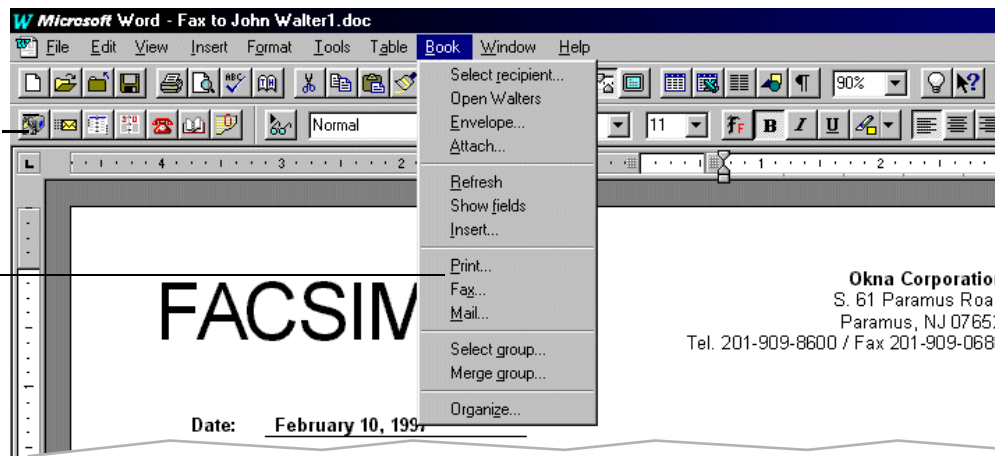
- ◆ Click the **Open** button. The document opens in Microsoft Word.
- ◆ When you finish making changes, select the **Book/Print** command from Word’s menu to print the letter.
- ◆ If you selected to print an envelope, Address Book’s envelope printing utility appears automatically.
- ◆ Otherwise, if you need an envelope, select **Book/Envelope** from Word’s menu.

Inside Microsoft Word

When you open a DeskTop Set-enabled template in Word, you’ll find a new menu in Word’s Menu Bar. You can use this **Book** menu to access DeskTop Set’s Word integration features:

The DeskTop Set-enabled toolbar lets you fax and attach your document, open the recipient’s Folder, or start any DeskTop Set module.

Use the Book menu to change recipients, set up a mail-merge, or fax your document.



The Book menu lets you access DeskTop Set-specific commands. The DeskTop Set-enabled toolbar begins the second row of buttons, just above the document’s ruler.

The Book Menu

Here are the commands available in the **Book** menu:

Command	Description:
Select recipient...	Use this command to open Address Book and select a new addressee.
Open [Record Name]	If you are writing a letter based on a phone conversation, you may need to review the recipient's phone log or attached notes. Use this command to open his or her DeskTop Set folder.
Envelope...	When you are preparing a letter, use this command to address and print an envelope using Address Book's printing system.
Attach...	Select this command to attach and list this document in the recipient's Address Book folder. You can then locate and open the file from DeskTop Set.
Refresh	If you have added merge fields or selected another person in your Address Book, this updates the document using the new information.
Show/Hide fields	Use this command to display the merge fields in a document. Select this command again to replace the them with their corresponding Address Book information.
Insert...	When you need to add merge fields to a document, use this command.
Print...	Once you have finished editing a document, this menu selection prints it. This command (and the following one) let you alternate between faxing and printing without changing your default printer.
Fax...	Requests WinFax Pro to send a document irrespective of the default printer selected in Word. WinFax stays in the background. You do not have to type the recipient's fax number if it is already entered in your Address Book.
Merge group...	Use this command to perform a mail merge using any combination of Address Book records.
Organize...	You can transfer DeskTop Set macros to any Word templates with this command.

Mail Merges

When you have a group of people that you need to correspond with, DeskTop Set's templates let you mail merge your letters or faxes to every person in the group quickly and easily.

DeskTop Set's most powerful Word feature is its *Auto* mode, which lets you put the different types of correspondence in order of preference: for example, *letter, fax, e-mail*. When you merge, each person will be sent a letter (your first preference), unless you do not have a mailing address for that person, in which case the letter will be faxed. If you do not have the person's address *or* fax number, the letter will be e-mailed through Microsoft Exchange. This is a powerful way to reach all the people in a group, topic, category, or an entire book, no matter what information you have for them.

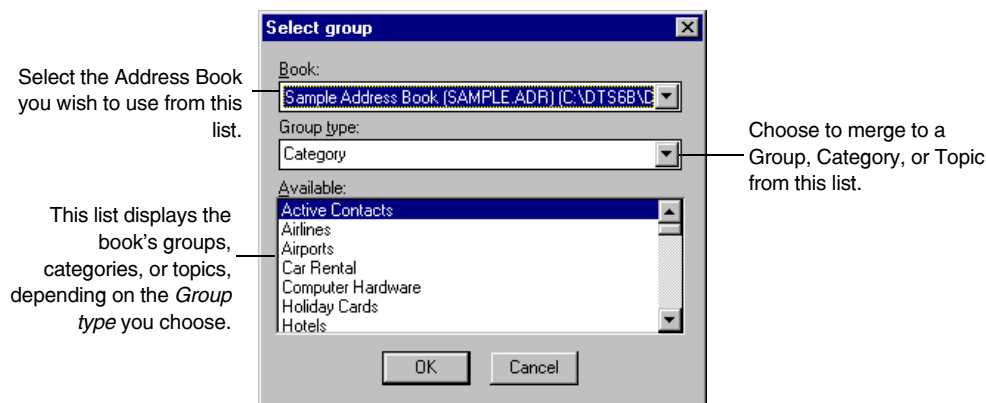
To select a mail merge template:

- ◆ Choose **File/Compose Letter/Select a template** from the Address Book menu.
- ◆ Set any options you wish to set (for more information, see "Changing template options" on page 404).
- ◆ Click the **Open** button to open the template in Word

When the template opens, the template loads the information from the last person you worked with in Address Book. You can then select the list of people you wish to mail merge.

To select the list of people to include in the mail merge:

- ◆ Choose **Book/Select Group** from Word's menu bar. The *Select group* window appears:



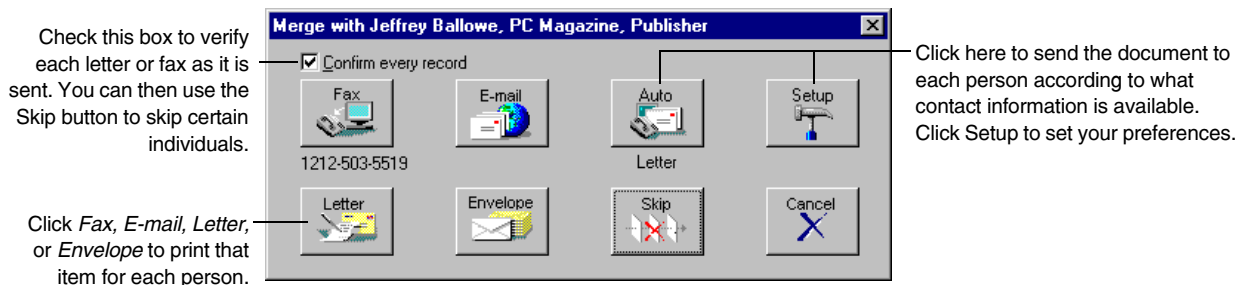
The Select group window lets you choose the Address Book you wish to use, and the Group, Category, or Topic you wish to mail merge to.

- ◆ Choose from your list of address books in the *Book* list.
- ◆ Choose the *Group type* you wish to mail merge to.
- ◆ Click the particular Group, Category, or Topic in the *Available* list.
- ◆ Click **OK**.

You will return to the template, and the first person in the group you've chosen will be loaded into the template. You can then begin the mail merge.

To mail merge a fax, letter, email, or envelope:

- ◆ Choose **Book/Merge Group** from Word's menu bar. The *Merge* window will appear:



- ◆ Choose whether or not to *Confirm every record*.
- ◆ Click **Fax**, **Letter**, **E-mail**, or **Envelope** to send the letter to every person in the group.

DeskTop Set will then begin printing the appropriate item for each person.

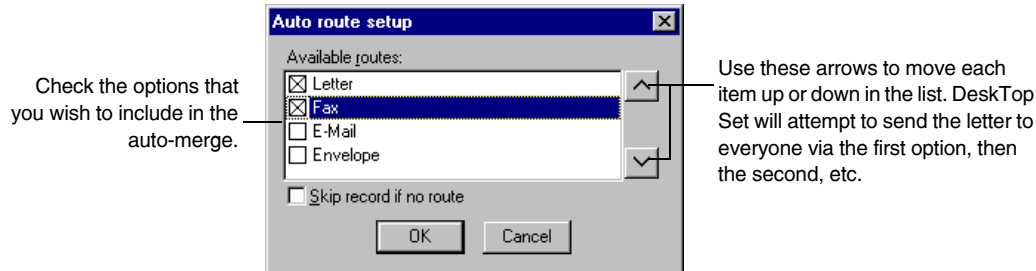
Auto-Merging

When you mail merge, you print a fax, letter, email, or envelope for every person in the list. With *auto-merge*, you still send the letter to each person in the list, but choose to send it via fax, letter (with or without a matching envelope), or e-mail, depending on what information is available for that person.

You can specify your order of preference (for example, *fax* first, then *letter*, then *e-mail*) and DeskTop Set will try to send everyone a fax. Those who do not have a fax number in their Address Book Folder will receive a letter, unless they do not have a mailing address, in which case the letter will be e-mailed.

To set up an auto-merge:

- ◆ Select a template and a merge group, as described above.
- ◆ When the *Merge* window appears, click **Setup**. The *Auto route setup* window appears:



Check the routes you want your message to be sent by, and the order of preference.

- ◆ Check those routes that you want to include in the auto merge.
- ◆ Use the arrow keys to reorder the routes according to your preference.
- ◆ Click **OK**.

To auto-merge:

- ◆ Click the **Auto** button.
- ◆ DeskTop Set will begin merging the letter to each person. If you've chosen to confirm each record, you will be asked to do so just before each person's letter is printed, faxed, or e-mailed.

Modifying templates

You have complete control over your templates' appearance. The following section explains how you can modify existing DeskTop Set templates (such as the four that come with the program) or make your existing Word templates DeskTop Set-aware.

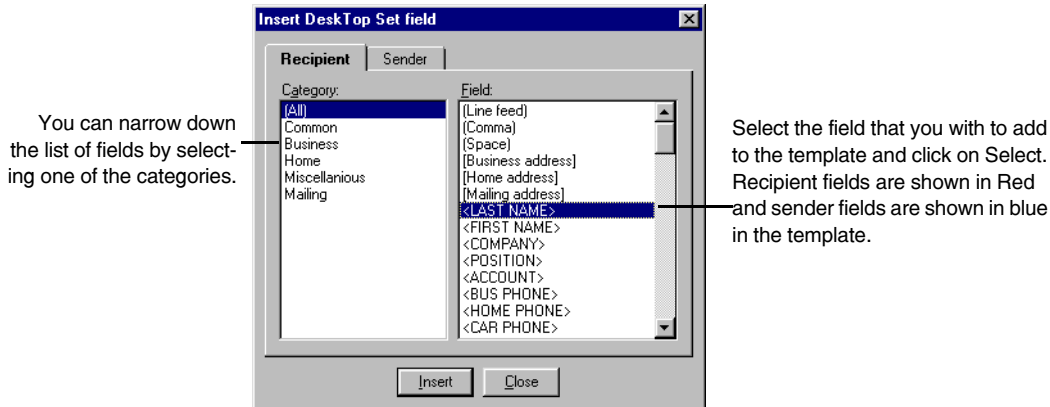
Modifying an existing DeskTop Set Template

There are four templates included with DeskTop Set that you can modify to easily create a customized template.

To edit an existing template:

- ◆ Choose **File/Compose letter/Select template** from the Address Book menu.
- ◆ Click the name of the template you wish to modify.
- ◆ Click the **Option** tab.
- ◆ Click **Open**, and answer **Yes** to the question, *Modify current template?*

- ◆ Your template will open in *Edit* mode, with the DeskTop Set field names displayed. Notice that your Word menu bar now contains a **Book** menu. This is a DeskTop Set menu, and all of Address Book's Word-related commands appear here.
- ◆ Select **Book/Insert** to display a list of available DeskTop Set fields. These fields are divided into two lists: the Recipient fields, and the Sender fields. These fields are further organized into groups, so you can find business, home, mailing, or miscellaneous fields quickly.



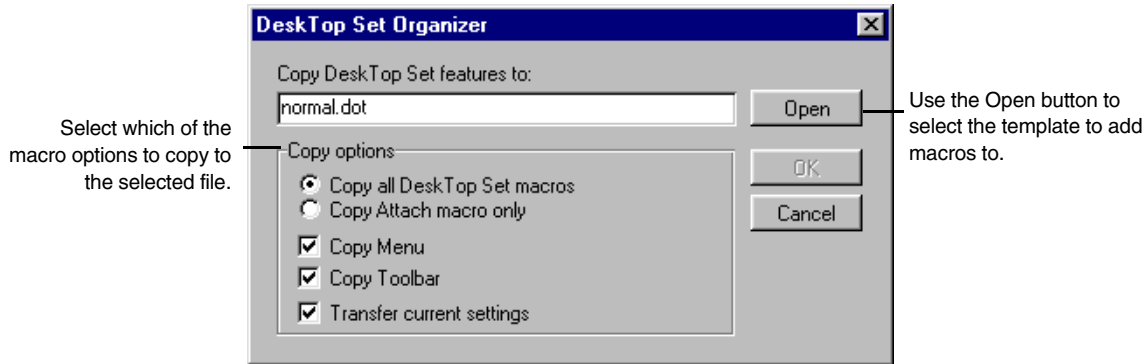
- ◆ You may now edit the template by typing the body text of your document. Format the document as you would any other Word document. When you wish to insert a DeskTop Set field, simply double-click the field's name in the list of fields, and it will be inserted into the document. You can format these fields (as Bold, Italic, etc..) as you would any other text.
- ◆ Choose **File/Save** to save the modified template when you are done editing.

Enabling your existing Word templates

Address Book's Organizer allows you to embed the DeskTop Set macros into your existing Word templates. These macros add Okna's **Book** menu to the Word Menu bar, along with the ability to insert DeskTop Set fields into your template, mail merge with groups, topics, and categories, and automatically attach these documents to the sender or recipients' DeskTop Set folders. The process is a simple one, and allows you to use your new, DeskTop Set-aware macros within minutes.

To make your existing templates DeskTop Set-aware:

- ◆ Choose **File/Compose letter/Select template...** from the Address Book menu.
- ◆ Click the **Option** tab.
- ◆ Click the **Organize** button. The Organizer window appears:



Option	Description
Copy DeskTop Set features to	Click the Open button to locate the template that you wish to attach the DeskTop Set macros to.
Copy all DeskTop Set macros	Copies all DeskTop Set macros, including automatic naming, attaching, field insertion, merging, and Word Summary information macros.
Copy Attach macro only	Will embed only the auto-attach macro to your template. Documents created with this template will automatically be attached to the Sender or Recipient's DeskTop Set folder when you save the document. These documents will not integrate information form DeskTop Set fields
Copy Menu	Inserts the DeskTop Set Book choice into the Word menu.
Copy Toolbar	Inserts the DeskTop Set toolbar alongside Words toolbar.
Transfer current settings	Transfers the current templates settings into the existing Word template.

Once you have selected your template, and your options, Click **OK**. Organizer will load your new DeskTop Set-aware template for editing. If you need to edit this template, see "Modifying an existing DeskTop Set Template" on page 412.

Creating a New DeskTop Set Template

Creating a new template allows you to design a custom document and include information from your DeskTop Set entries in the letter. This template can then be used to send a single form letter or fax, or mail merge with an entire group, category, topic, or address book.

To create a new DeskTop Set template:

- ◆ Choose **File/Compose letter/Select template...** from the Address Book menu.
- ◆ Click the **New** button.
- ◆ Select a template base, which is the basic template that you would like to base your new template on.
- ◆ Give your template a file name.
- ◆ Title your template. DeskTop Set will refer to this new template by its title; the name you place in this field will appear in the lists of available templates.
- ◆ Click the **Create** button.

Your new template's name now appears in the list of available templates.

The **Options** tab allows you to customize how documents created with this template will be organized: you can automatically name these files, save them in particular directories, and automatically attach them to the sender or recipients' folder(s).

For information on how to modify your new template, see "Modifying an existing DeskTop Set Template" on page 412.

9

Working with PalmPilot

Introduction

If you own a 3COM PalmPilot, you can transfer information between DeskTop Set and the PalmPilot using the PalmPilot's HotSync button. The process is a simple one, and allows you to choose exactly how the information will be synchronized.

The following information discusses how this integration can be installed and configured, as well as how to synchronize your Calendar and Address Book information.

Installing PalmPilot Integration

Installing DeskTop Set's PalmPilot integration is a simple procedure. The following instructions assume that you have already installed the PalmPilot, and its software, according to 3COM's instructions, and that the PalmPilot is working properly.

In order to synchronize your DeskTop Set information with the PalmPilot, you will first need to install DeskTop Set's PalmPilot Integration software. You have the option to do this when you first install DeskTop Set, and you can also choose to do this at any time after installation.

To install DeskTop Set's PalmPilot integration:

- ◆ Insert the DeskTop Set CD-ROM into your computer.
- ◆ The Installation Screen may appear automatically. If it does not, open the CD by double-clicking its icon, and then run **Autorun.exe** by double-clicking it.
- ◆ The DeskTop Set Installation screen will appear. Click the option labeled "Install PalmPilot Interface". This will install DeskTop Set's PalmPilot software onto your hard drive.

Once DeskTop Set's PalmPilot software is installed, the next step is to choose what will happen when you press the HotSync button on the PalmPilot's cradle.

Setting up PalmPilot Synchronization

DeskTop Set's Synchronization Setup allows you to configure how DeskTop Set and the PalmPilot will synchronize. These are the settings that will be used each time you press the PalmPilot's HotSync button. If you need to change the way the synchronization is performed at any time, you can run this utility and make the necessary changes.

PalmPilot's
"Desktop" vs.
DeskTop Set

DeskTop Set's PalmPilot interface will allow you to synchronize both your Address Book and Calendar files. You can also choose to sync the Address Book *or* the Calendar. Finally, you can choose to sync one of your DTS files and one of the PalmPilot software's own files. The PalmPilot's organizer software is called PalmPilot Desktop.

Please keep this distinction in mind as you review this document.

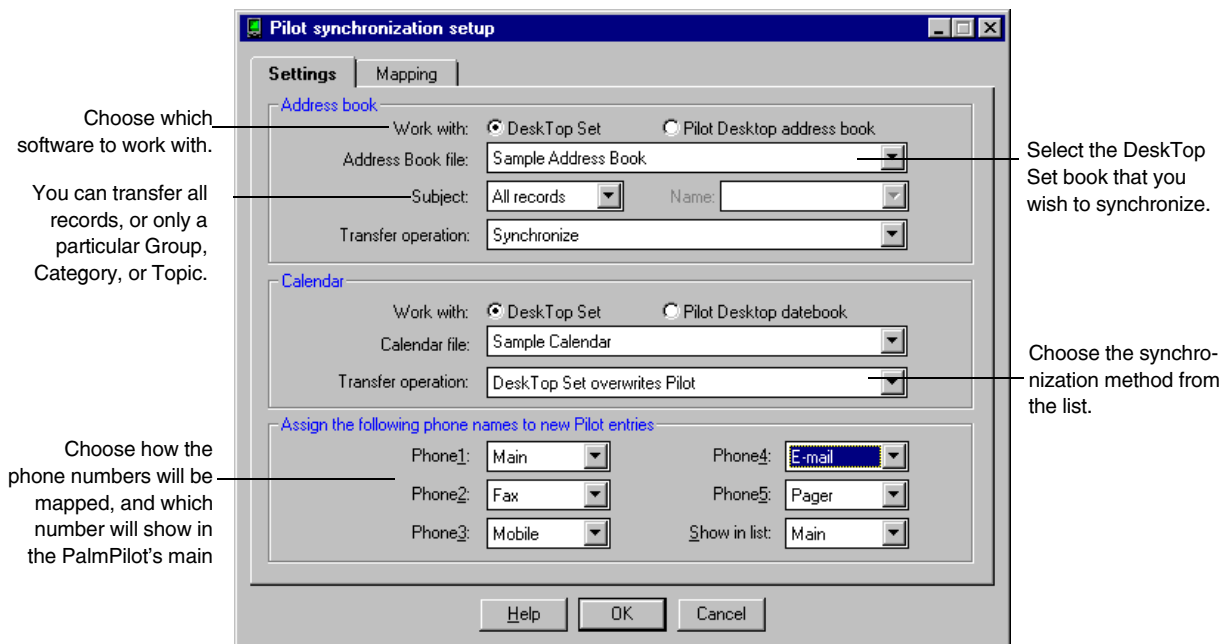
Configuring DeskTop Set's PalmPilot Synchronization

To configure the PalmPilot transfers in Windows 95:

- ◆ Select **Start/Programs/DeskTop Set/Accessories/DTPalmPilot.EXE...** or
- ◆ Open your DeskTop Set folder on the Windows 95 DeskTop and double-click **DtPalmPilot.exe**.
- ◆ The PalmPilot Synchronization Setup window will appear.

To configure the PalmPilot transfers in Windows 3.1x:

- ◆ In Program Manager, double-click the DeskTop Set group to open it.
- ◆ Double-click the **DtPalmPilot** icon.
- ◆ The PalmPilot Synchronization Setup window will appear:



The PalmPilot Synchronization Setup window lets you control how DeskTop Set and PalmPilot will exchange information.

To ignore your DeskTop Set files, and synchronize the PalmPilot software's address book or calendar:

- ◆ Check "Work with PalmPilot Desktop" next to the Address Book or Calendar.
- ◆ Your other options will become disabled. The PalmPilot will then integrate with 3COM's own address book or calendar when the HotSync button is pressed.
- ◆ Click **OK**.

The synchronization will now proceed according to the settings in 3COM's own address book and calendar software.

To include DeskTop Set's files in the transfer:

- ◆ Select the option marked "Work with DeskTop Set".
- ◆ Select the Address Book and Calendar files you wish to transfer in the drop-down lists.
- ◆ If you are working with the Address Book, you can choose to synchronize all the records in the address book, or only those records in a particular Group, Category, or Topic.
- ◆ Choose the *Transfer Operation* for each file.
- ◆ Click **OK**.

Setting the Transfer Operation

The Operation controls how the information between DeskTop Set and the PalmPilot will be transferred. You have four options:

Option	Description
Synchronize	This option will combine the contents of the DeskTop Set file and the PalmPilot. This combined file will appear in both the PalmPilot and DeskTop Set.
DeskTop Set overwrites PalmPilot	The contents of the PalmPilot will be overwritten with the contents of the DeskTop Set file.
PalmPilot overwrites DeskTop Set	The DeskTop Set file will be overwritten with the contents of the PalmPilot.
Do Nothing	The DeskTop Set file will not be synchronized in any way. In addition, PalmPilot will ignore its own software's files. Select this option if you do not want either software's files to be included in the synchronization.

Configuring the Phone Numbers

PalmPilot automatically numbers an entry's phone numbers as *Phone1*, *Phone2*, etc. You have the option of changing these labels, and assigning the first phone number as a Work phone, the second as a Fax phone, etc. PalmPilot will also allow you to specify which phone number will appear in the main list of contacts.

You can also set these options through DeskTop Set's PalmPilot Synchronization Setup window. These settings will then be applied to any entry transferred from DeskTop Set to the PalmPilot.

To change the Phone Number settings for PalmPilot, choose which DeskTop Set number you want to appear in each of the PalmPilot's 5 phone numbers. You can also select which of these phone numbers will appear in the PalmPilot's main list.

Synchronizing Your Information

Once you have selected the Address Book and Calendar files that will be synchronized, and specified how the synchronization will proceed, you are ready to synchronize your information.

To perform a synchronization:

- ◆ Quit Address Book and Calendar (or open files other than the ones you wish to synchronize). Files cannot be synchronized while they are open.
- ◆ Place the PalmPilot in its cradle.
- ◆ Run PalmPilot's *HotSync Manager*.
- ◆ Press the **HotSync** button on the cradle to begin the synchronization. You will receive a confirmation when the transfer is complete.
- ◆ You will be alerted if the transfer generates any HotSync Log messages. For more information on the HotSync Log, see the PalmPilot's documentation.

How Information is Synchronized

When you synchronize data between DeskTop Set and the PalmPilot, you are combining their files, and copying the combined file into both PalmPilot and DeskTop Set.

The following describes how this is accomplished, and how conflicts (such as duplicate names, or two events in the same timeslot) are handled.

Synchronizing Calendar Files

Your Calendar information will synchronize much like PalmPilot's own software. The following information will transfer between DeskTop Set and PalmPilot:

- ◆ Event times and descriptions
- ◆ Alarms
- ◆ Event notes
- ◆ Recurring information

If an event is scheduled in both the PalmPilot and in DeskTop Set, both events will appear in both places after the synchronization is complete.

Synchronizing Address Book Files

Your Address Book information will synchronize much like the PalmPilot's own software. By default, the transfer will include each entry's name, business address, telephones, and category assignments, as well as their business notes. Keep in mind, however, that you can customize the Address Book transfer to include any of your DeskTop Set fields. For more information on how to do this, "Changing the Field Mappings" on page 422.

Conflicts between the PalmPilot and DeskTop Set will be handled in the same way as with PalmPilot's own software:

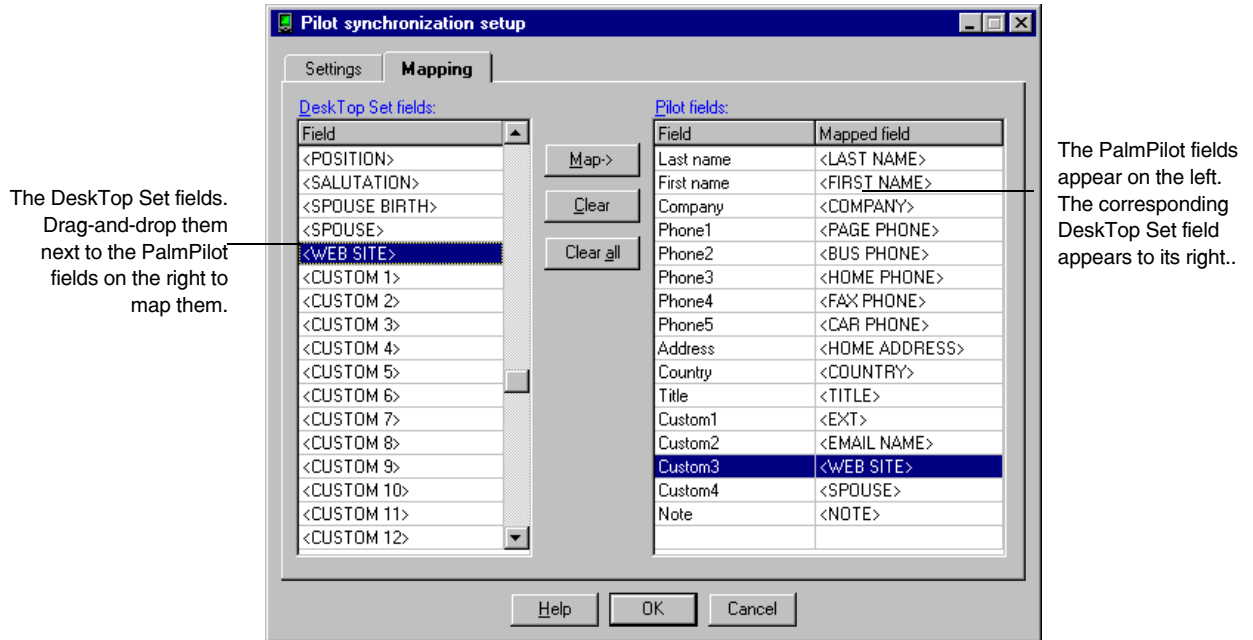
- ◆ New records added to either PalmPilot or DeskTop Set will appear in both places after the synchronization.
- ◆ Changes made to records in PalmPilot *or* DeskTop Set will be reflected in both address books after the synchronization is complete.
- ◆ Changes made to the same record in both the PalmPilot *and* DeskTop Set will cause both records to be written to both the PalmPilot and DeskTop Set. This will also generate HotSync message; For more information on the HotSync log, see PalmPilot's documentation.

Changing the Field Mappings

DeskTop Set is already configured to associate, or *map*, information between DeskTop Set and the PalmPilot. The mapping specifies, for example, that each records' Business Phone should be transferred to PalmPilot's *Phone 2* field, and vice versa. If you wish, you can edit this mapping so that the fields are transferred exactly as you wish.

To review the field mapping:

- ◆ Click the *Mapping* tab at the top of the PalmPilot Synchronization Setup window.
- ◆ The list of field mappings will appear:



The Mapping tab controls how each record's fields are transferred between DeskTop Set and PalmPilot.

To change the field mapping:

- ◆ Drag the DeskTop Set field from the list on the left, and drop it onto a PalmPilot field in the list on the right, **or...**
- ◆ Highlight a DeskTop Set field in the list on the left, and click the PalmPilot field you wish to map it to in the list on the right. Then click the **Map** button.

To remove a field mapping:

- ◆ Highlight the mapping you wish to remove in the list on the right.
- ◆ Click the **Clear** button, or the **Clear All** button to remove all field associations.

10 Working with CardScan

If you own a scanner that is compatible with Corex's CardScan software, you can easily use it to scan cards which can then be transferred directly to DeskTop Set. The following instructions assume that your CardScan is already set up, that its software is installed, and that the your scanner is working properly.

What you'll need

DeskTop Set works with Corex's CardScan software. We support Versions 2.1 and 3.0, and you can scan your business cards in on any scanner that CardScan supports. For more information on supported scanners, please see CardScan's documentation.

Setting up the CardScan transfers

Before transferring your information from CardScan to DeskTop Set, you may want to review the following options that control how the transfer is conducted.

DeskTop Set Options

DeskTop Set gives you the option to accept card transfers blindly, or to verify each card as it is transferred from CardScan.

To choose how cards are transferred:

- ◆ Choose **File/Setup...** from the Address Book menu.
- ◆ Click the **General** tab.
- ◆ Enable or disable the following *Components and Options* settings:

Option	Description
Confirm business card information	As each business card is transferred to DeskTop Set, its Page Name and Number will be displayed, giving you the chance to edit them first.
Show scanned business card	When this option is checked, the new entry's Folder will open after the business card is transferred. This is useful for verifying the transfer, or adding additional information to the new record.

CardScan Options

Please review the CardScan documentation prior to transferring cards to DeskTop Set. The following instructions assume that CardScan, and your scanner, are properly installed, configured, and that you are able to scan business cards into CardScan properly.

Transferring Business Cards to DeskTop Set

Using CardScan's Transfer Feature

CardScan 2.1 and 3.0 allow you to transfer cards directly into DeskTop Set.

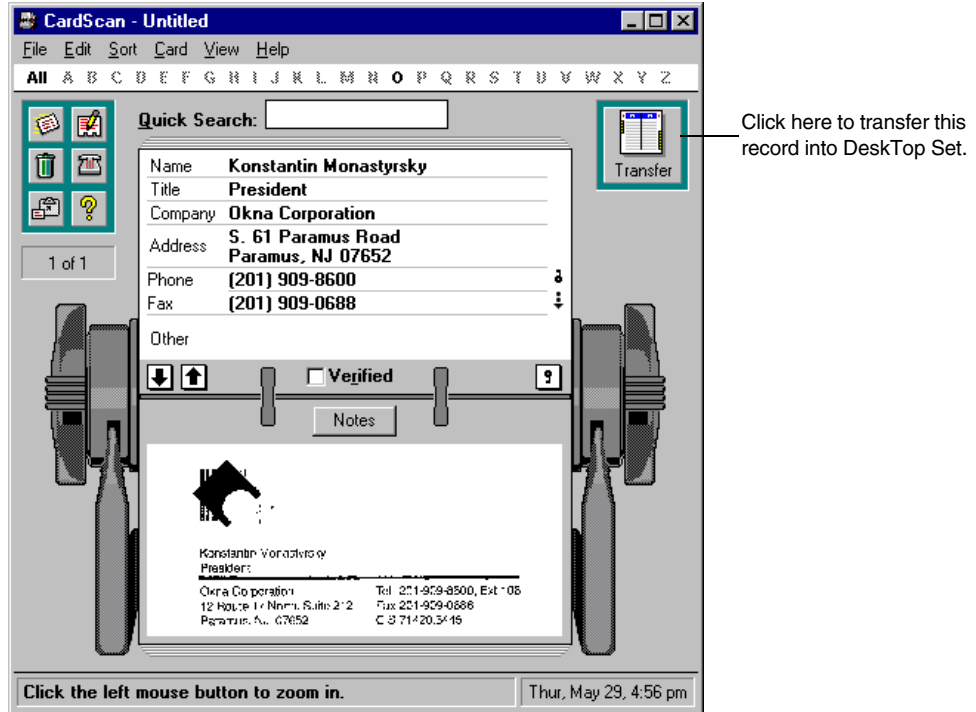
To transfer your CardScan entries at once:

- ◆ Choose **File/Transfer...** from CardScan's menu.
- ◆ Choose which cards you want to transfer in the *Transfer*: drop-down list.
- ◆ Choose *DeskTop Set 6* in the list of applications. and click **OK..** CardScan will begin transferring the cards into DeskTop Set.

- ◆ If you have chosen to verify each card, or to view each new record's Folder as it is created, you will be able to verify each card as it is transferred. For more information on these options, "DeskTop Set Options" on page 426.
- ◆ When the transfer is complete, CardScan will display a confirmation screen.

To transfer individual cards:

- ◆ Once you've performed the above procedure, CardScan will place a large **Transfer** button in its window:



- ◆ To transfer the card you are currently viewing, click the **Transfer** button.
- ◆ CardScan will begin transferring the cards into DeskTop Set.
- ◆ If you have chosen to verify each card as it is imported, or to view each new record's Folder as it is created, you will be able to verify each card as it is transferred. For more information on these options, "DeskTop Set Options" on page 426.
- ◆ When the transfer is complete, CardScan will display a confirmation screen:

Using the CardScan 3.0's Export Wizard

CardScan provides a Transfer Wizard to lead you through transferring your cards into DeskTop Set. You can run this Wizard to transfer your data to DeskTop Set:

To run the Export Wizard:

- ◆ Run CardScan.
- ◆ Run DeskTop Set, and open the Address Book you wish to transfer the information to.
- ◆ From the CardScan menu, choose **File/Export**. The *Export Wizard* window appears, simply follow the prompts to perform the transfer. For more information on the Export Wizard, click **Help**, or see your CardScan documentation.

11 Working with Exchange

DeskTop Set's integration with Microsoft Exchange lets you send e-mail right from DeskTop Set. If you prefer to compose your e-mail in Exchange, you can also set Exchange to use your DeskTop Set address book as its own, so you do not have to enter your names and e-mail addresses into both applications.

Preparing Exchange to use DeskTop Set

Before you can use DeskTop Set and Exchange together, you'll need to configure both programs so that they recognize each other:

Installing Microsoft Exchange

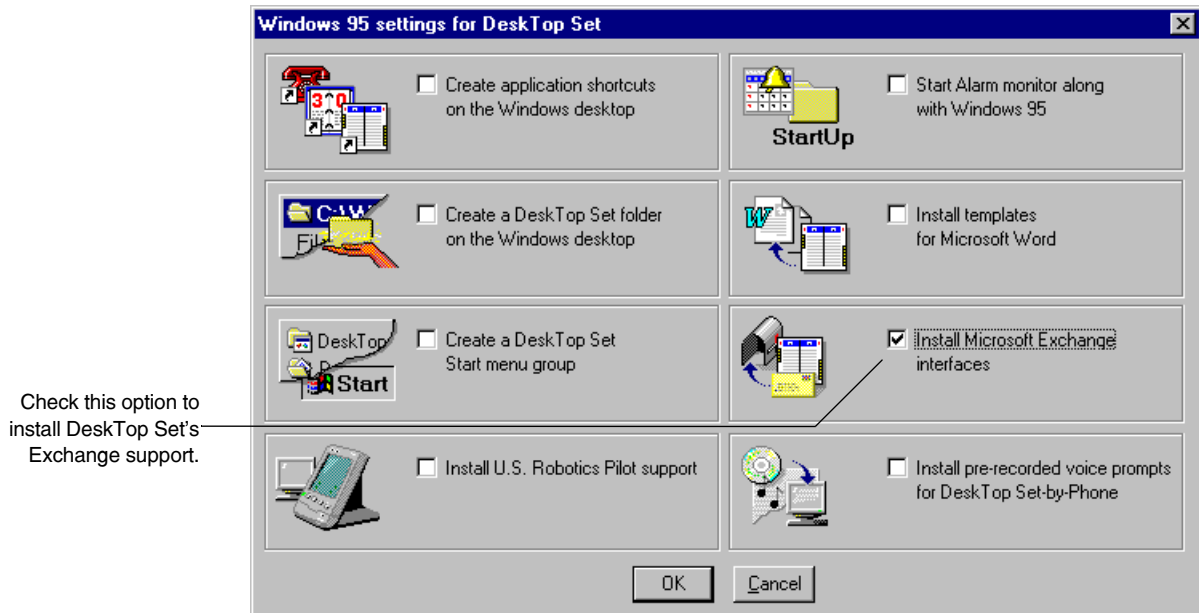
Exchange is available to all Windows 95 and Windows NT users, and can be installed from your Windows CD-ROM. If you do not already have Exchange installed and working, please see your Windows documentation for assistance. If you are new to Exchange, please be sure the program is working properly on its own before configuring it to work with DeskTop Set.

Installing DeskTop Set's Exchange Support

When you first install DeskTop Set onto your Windows 95 or NT machine, you are presented with the option to install support for Exchange. If you chose to install Exchange during the installation, please skip this section and continue with "Adding a DeskTop Set profile to Exchange" below.

If you did not install Exchange support during DeskTop Set's installation:

- ◆ Click the Windows 95 or NT **Start** menu.
- ◆ Select **Programs/DeskTop Set/Accessories/Windows 95 Setup**. The Windows 95 Setup window will appear:



The Windows 95 Settings can be used to install these DeskTop Set features at any time.

- ◆ Check the box next to *Install Microsoft Exchange Interface*.
- ◆ Click **OK**.

DeskTop Set will begin installing support for Exchange. You'll receive a confirmation message when the installation is complete.

Once this installation is done, you are ready to configure Exchange to use your DeskTop Set address book.

Adding a DeskTop Set profile to Exchange

Before you can use your DeskTop Set address book in Exchange, you must configure Exchange to recognize DeskTop Set. You must also select which of your address books Exchange will use, so you should have at least one DeskTop Set address book (event if it is empty) before proceeding.

To add DeskTop Set's Address Book to your Exchange profile:

- ◆ Click the Windows Start menu, and select **Settings/Control Panel**.
- ◆ Double-click **Mail and Fax** to open the control panel.
- ◆ Click the **Add** button.
- ◆ Highlight *DeskTop Set Address Book*.
- ◆ Click **OK**.
- ◆ Click **Available books**.
- ◆ Highlight the address book file you want to use in Exchange.
- ◆ Click **Select**, and then **OK**.
- ◆ Click **OK** again to exit Exchange's *Properties* window.

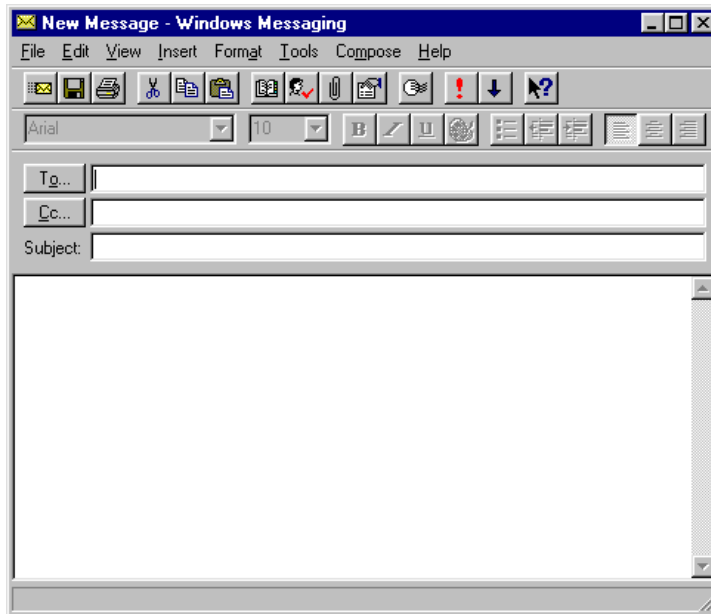
If Exchange is already running, you must exit and restart it to use these new settings. Once Exchange is restarted, you are ready to begin using your DeskTop Set information in Exchange.

E-mailing from Exchange

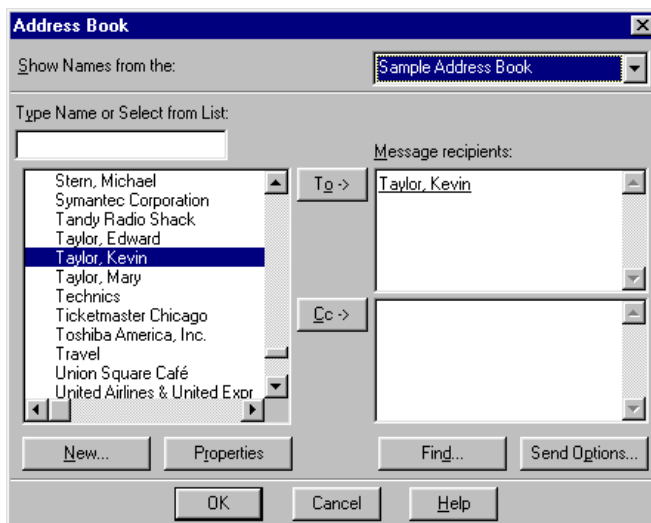
If you have already been using Exchange to send e-mail, you can continue e-mailing exactly as you did before, using the addresses in your DeskTop Set address book.

To send e-mail from Exchange:

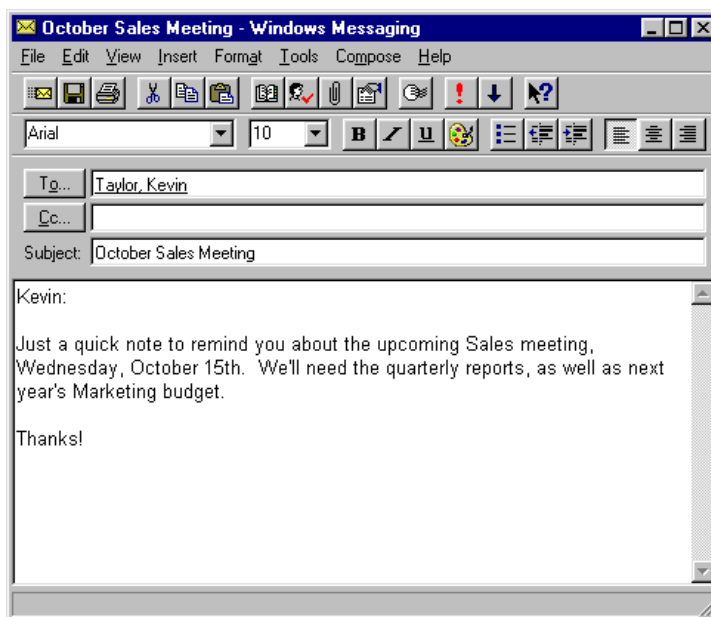
- ◆ Run Exchange (you can do this by double-clicking the *Inbox* icon on your Windows desktop).
- ◆ Select **Compose/New Message** from the menu bar. The new message window appears:



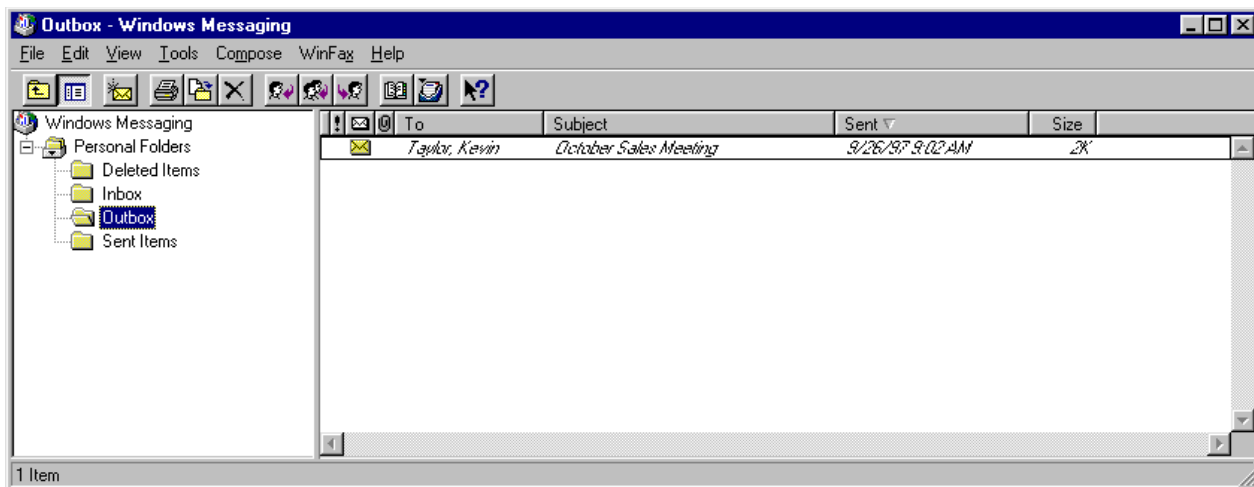
- ◆ Click the **TO** button to select a recipient. The *Address Book* window appears:



- ◆ Scroll through the list to find a name, or use the *Search* box at the top of the screen. Highlight the person you wish to e-mail, and click the **To** button to move them to the *Message Recipients* list.
- ◆ Click **OK**. The e-mail editor appears:



- ◆ Type a *Subject* and a message into the appropriate fields. You can also apply special formatting and spell checking when you are finished; for more information on these features, see the Windows Help file or your Exchange documentation.
- ◆ When you are finished composing the e-mail, choose **File/Send** from the menu (you can also press **Ctrl-Enter** to send the message). The message will be sent, and your list of mailboxes will appear. Double-click the *Outbox* to see your outgoing messages:



To send your e-mail

- ◆ Select **Tools/Deliver Now** from the menu.
- ◆ Depending on how you have Exchange configured, your service provider's logon screen will appear. For more information on setting up your service provider to work with Exchange, please consult Exchange's documentation.

E-mailing from DeskTop Set

You can also choose to compose an e-mail right from DeskTop Set. This saves you a step, since you do not have to run Exchange to compose the e-mail.

Entering e-mail addresses in DeskTop Set

E-mail addresses can be entered into a contact's address book folder. DeskTop Set divides e-mail addresses into two parts: a Service Name and a Routing Address. The Service Name is used to store the type of e-mail service, such as *Compuserve*, *SMTP*, *MCI*, etc. The Routing Address is used to store the person's actual e-mail address, such as *Help@Okna.com*, *Mwalker@msn.com*, *Br330@abc.edu*, etc..

To enter an e-mail address into DeskTop Set:

- ◆ Create a new folder by double-clicking a blank line in Address Book **or...**
- ◆ Double-click an existing entry to open their Folder.
- ◆ Click the *Record* tab at the top of the Folder, and the *All* filter tab at the bottom of the Folder.
- ◆ Enter the Service Address, or choose one from the drop-down list.
- ◆ Enter the Routing Address in the space to the right.
- ◆ (E-mail addresses can also be entered on the *Misc.* filter tab, at the bottom of the Folder).
- ◆ Close the Folder to save your changes.

Importing e-mail addresses from Exchange

As you use Exchange to read new e-mail, you will likely receive mail from people who are not yet entered into your DeskTop Set address book. When this happens, you can easily import the person's name and e-mail address into DeskTop Set.

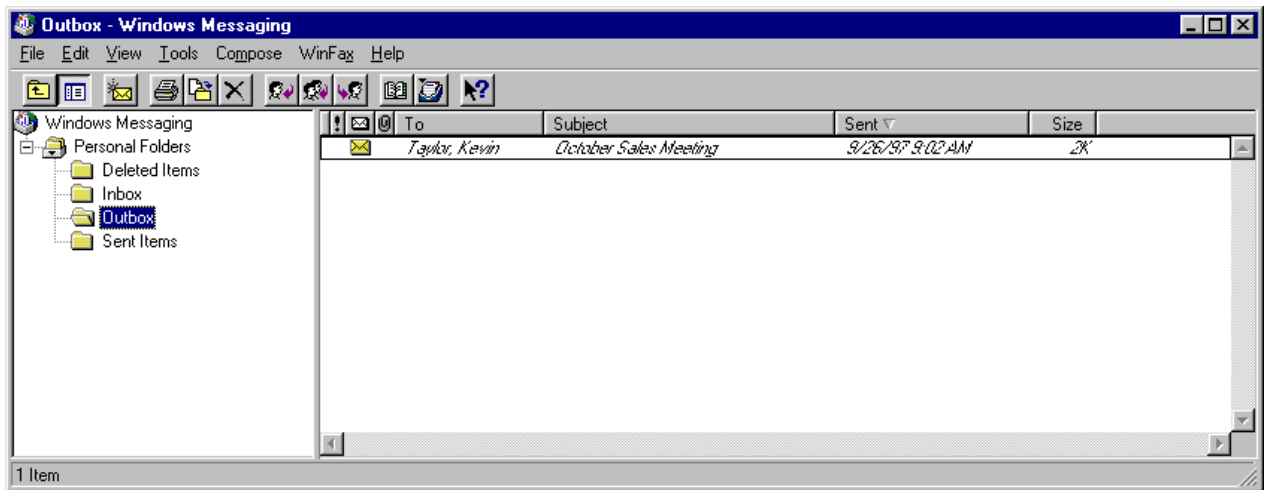
To import a name and e-mail address from Exchange into DeskTop Set:

- ◆ While reading the e-mail, select **Tools/Export e-mail address** from the Exchange menu.
- ◆ In *Address list*, select the person you want to import.
- ◆ Under *Page name*, type the person's name as you want it to appear in DeskTop Set's Page View.
- ◆ Under *Address book*, select the DeskTop Set address book that you wish to import this person's information into.
- ◆ Click the **Add** button. The person's name and e-mail address will be added to DeskTop Set.

Composing e-mail in DeskTop Set

Once a person's e-mail address has been entered into their DeskTop Set Folder, you can send them an e-mail right from DeskTop Set:

- ◆ Highlight the person's name in Address Book.
- ◆ Choose **File/Send e-mail** from the menu. The e-mail editor appears.
- ◆ Type a *Subject* and a message into the appropriate fields. You can also apply special formatting and spell checking when you are finished; for more information on these features, see the Windows Help file or your Exchange documentation.
- ◆ When you are finished composing the e-mail, choose **File/Send** from the menu (you can also press **Ctrl-Enter** to send the message). The message will be sent, and your list of mailboxes will appear. Double-click the *Outbox* to see your outgoing messages:



To send your e-mail

- ◆ Select **Tools/Deliver Now** from the menu.
- ◆ Depending on how you have Exchange configured, your service provider's logon screen will appear. For more information on setting up your service provider to work with Exchange, please consult Exchange's documentation.