

HOW TO PERFORM A SUCCESSFUL HOTSYNC BETWEEN AMICUS AND YOUR PALM

Important Issues / Helpful Hints

1. Perform the HotSync on a regular basis - get into the habit of performing a HotSync with Amicus first thing in the morning or as soon as you open your Amicus office. Also, perform a HotSync as the last function of the day prior to closing Amicus and/or leaving your office, or anytime you leave the office and may have the need to make changes to any records in your Palm.
2. Familiarize yourself with the field mappings / Use the Notes field - every Amicus field is mapped to a specific field on the Palm. Be aware that there are many fields in Amicus that do not exist in the Palm, and therefore, they will not be transferred to the Palm.

List any extra information in the 'Notes' field in Amicus (in addition to the regular Amicus field) for information in any field that isn't fixed (or doesn't exist) in the Palm, e.g., cell phone, second e-mail address, second address, pager, etc. For example, when you enter a contact's cell number in the cell phone field in Amicus, also enter it in the 'Notes' field. That way, it will be in the 'Notes' field in your Palm, since there is no fixed 'Cell' field in the Palm.

- A. Amicus has 3 address fields per contact - the Palm only has 1
- B. Amicus has many fixed communication fields that the Palm does not have - i.e., Cell, Pager, Business 2, Home E-mail, Business E-mail, etc.
- C. If you click on the drop-down arrow on any of the 5 communication fields on your Palm and select a different field name, the information will still be transferred to the Amicus field listed on the chart below.
- D. You can also customize up to 3 text fields in Amicus that contain information that will exchange to 3 custom fields in the Palm.

Amicus Attorney field	Palm field
Prefix	No equivalent
First	First name
Last	Last name
Middle	No equivalent
Salutation	No equivalent
Job Title (primary)	Title
Company (primary)	Company
Street Address (primary)	Address
City (primary)	City
State/Province (primary)	State or Province
Zip/Postal Code (primary)	Zip or postal code
Country (primary)	Country

Amicus Attorney field	Palm field
Business Phone	Work (1 st phone field)
Home Phone	Home (2 nd phone field)
Other Phone - Other card	Other (4 th phone field)
Fax Number (primary card)	Fax (3 rd phone field)
E-mail (primary card)	E-mail (5 th phone field)
Custom 1 (if text field)	Custom 1
Custom 2 (if text field)	Custom 2
Custom 3 (if text field)	Custom 3
No equivalent	Custom 4
Notes	Note

3. Team Members on records transferred from the Palm - when you add a Contact, Appointment or To Do into the Palm, and do a HotSync, it will only be in your Amicus office. Edit the record in Amicus and add any other Team Members, and any File or Contact information for that record.
4. Categories (Contact Groups in Amicus)- Categories are ignored when a hot-sync is performed. Therefore, when you hot-sync with Amicus, and have groups assigned to contacts in Amicus, those groups will not be created or assigned on the Palm. (All contacts that come over from Amicus will be displayed in the Palm as 'Unfiled' and 'All').
 - A. You can assign categories for any contact(s) in the Palm, and when the HotSync is performed, those categories would remain in the Palm - and Amicus groups will not be affected.
 - B. Only one category can be selected for a contact on the Palm, while one or more groups can be selected for a contact in Amicus.
5. Common scenario for disappearing information
 - A. You enter a contact's cell phone number in the 'Other' field in the Palm, and after returning to the office, perform a HotSync.
 - B. Later you look for that contact's cell phone number in Amicus and it is in the 'Other' field in Amicus. You move it from the 'Other' field to the 'Cell' field in Amicus and perform a HotSync.
 - C. The next time you look for the cell phone number in the Palm, it isn't there.

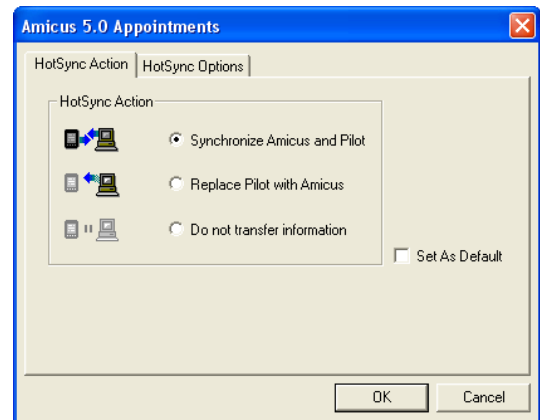
The moral of the story is – use the 'Notes' field to duplicate information that is stored in Amicus fields that do not exist on the Palm.

Customizing the HotSync Options

Before you are ready to synchronize data, be sure that the HotSync Manager icon is open (if it is not on the Taskbar, select Start - Programs - Palm Desktop - HotSync Manager).

1. Amicus Appointments

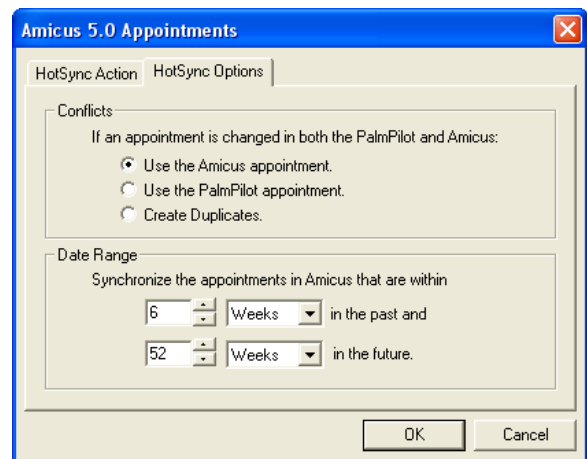
- A. Click on the HotSync Manager icon and select Custom.
- Double-click on the Appointments conduit to see the HotSync Action selections. In most cases, leave the default 'Synchronize Amicus and Pilot'.
 - 'Set as Default' should only be checked if you wish to change the default for the entire Appointments conduit (selections on both the Action and Options tabs).



- B. Click on the HotSync Options tab. Now you need to decide what to do if an appointment is changed in both the Palm and Amicus. (This option can be changed any time; however, if you do not go to the HotSync Options tab prior to performing a HotSync, the default selections will be used.)

NOTE: Keep in mind that you must actually change the record in the Palm for it to be flagged as 'changed'; however, in Amicus, just clicking on a record sets the flag as 'changed'.

- 'Use the Amicus appointment' - if you normally create or modify appointments in Amicus, select this option as the default.
- 'Use the Palm Pilot appointment' - if you normally create or modify appointments on your Palm, select this option as the default.
- 'Create duplicates' - if there is a possibility that you may have "edited" one or more appointments in both Amicus and the Palm, then you should select this option prior to performing the HotSync operation. (It is not recommended that this option be used as the default).

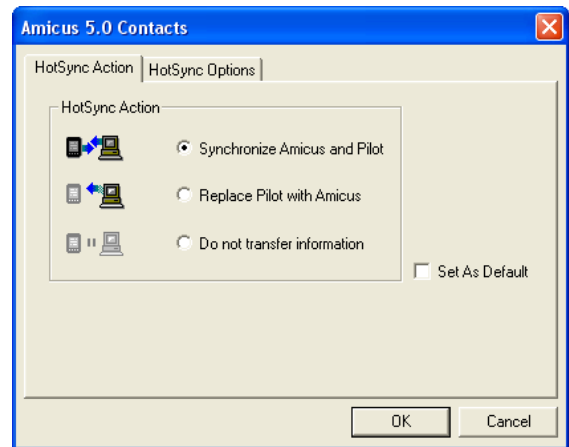


NOTE: The HotSync Problem window will open if any problems were encountered during the HotSync process (such as duplicate appointments, or appointments modified in both Amicus and Palm). See page 6 for information on Checking the Log - Cleaning up Duplicates.

NOTE: Read page 1 and 2 for Helpful Hints that will help avoid duplicates or lost data.

2. Amicus Contacts

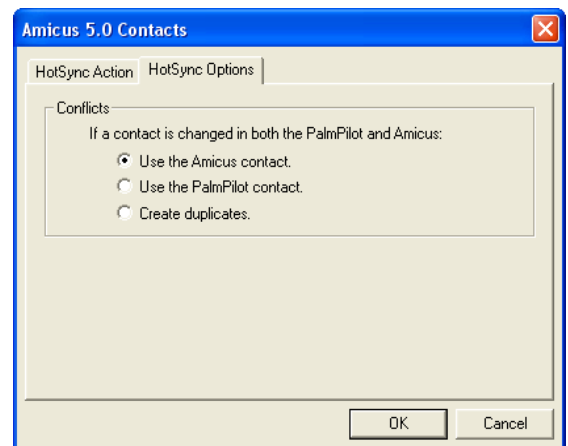
- A. If necessary, click on the HotSync Manager icon and select Custom from the Taskbar.
- Double-click on the Contacts conduit to see the HotSync Action selections. In most cases, leave the default 'Synchronize Amicus and Pilot'.
 - 'Set as Default' should only be checked if you wish to change the default for the entire Contacts conduit (selections on both the Action and Options tabs).



- B. Click on the HotSync Options tab. Now you need to decide what to do if a contact's record is changed in both the Palm and Amicus. (This option can be changed any time; however, if you do not go to the HotSync Options tab prior to performing a HotSync, the default selections will be used.)

NOTE: Keep in mind that you must actually change the record in the Palm for it to be flagged as 'changed'; however, in Amicus, just clicking on a record sets the flag as 'changed'.

- 'Use the Amicus contact' - if you normally create or modify contacts in Amicus, select this option as the default.
- 'Use the Palm Pilot contact' - if you normally create or modify contacts on your Palm, select this option as the default.
- 'Create duplicates' - if there is a possibility that you may have "edited" one or more contacts in both Amicus and the Palm, select this option prior to performing the HotSync operation. (It is not recommended that this option be used as the default).

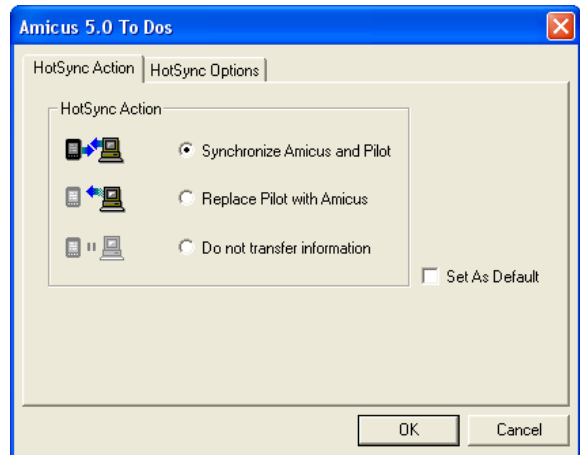


NOTE: The HotSync Problem window will open if any problems were encountered during the HotSync process (such as duplicate contacts, or contacts modified in both Amicus and Palm). See page 6 for information on Checking the Log - Cleaning up Duplicates.

NOTE: Read page 1 and 2 for Helpful Hints that will help avoid duplicates or lost data.

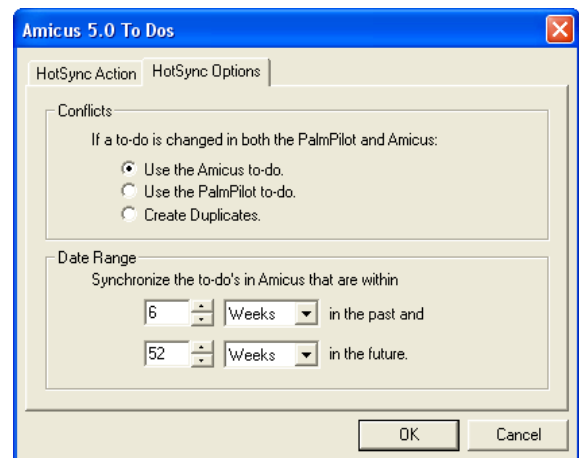
3. Amicus ToDo's

- A. If necessary, click on the HotSync Manager icon and select Custom from the Taskbar.
 - i. Double-click on the ToDos conduit to see the HotSync Action selections. In most cases, leave the default 'Synchronize Amicus and Pilot'.
 - ii. 'Set as Default' should only be checked if you wish to change the default for the entire ToDos conduit (selections on both the Action and Options tabs).



- B. Click on the HotSync Options tab. You need to decide what to have HotSync do if a ToDo is changed in both the Palm and Amicus. (This option can be changed any time; however, if you do not go to the HotSync Options tab prior to performing a HotSync, the default selections will be used.)

- i. 'Use the Amicus to-do' - if you normally create or modify ToDo's in Amicus, select this option as the default.
- ii. 'Use the Palm Pilot to-do' - if you normally create or modify ToDo's on your Palm, select this option as the default.
- iii. 'Create duplicates' - if there is a possibility that you may have "edited" one or more ToDo's in both Amicus and the Palm, select this option prior to performing the HotSync operation. (It is not recommended that this option be used as the default).



NOTE: The HotSync Problem window will open if any problems were encountered during the HotSync process (such as duplicate To Do's, or To Do's modified in both Amicus and Palm). See page 6 for information on Checking the Log - Cleaning up Duplicates.

NOTE: Read page 1 and 2 for Helpful Hints that will help avoid duplicates or lost data.

Checking the Log - Cleaning up Duplicates

1. After the HotSync operation is finished, you may see a HotSync Problem dialog box. Click on 'View Log'.

NOTE: If no message box appears, or if you missed clicking on View Log while the dialog box was open, you can still check the log to see what happened by clicking on the HotSync Manager and selecting View Log.



- A. Overwritten Records - If you had selected 'Use the Amicus appointment / contact / to-do' or 'Use the Palm appointment / contact / to-do' on the HotSync Options tab, and there were one or more records that were modified in both Amicus (Desktop or Palm Desktop) and the Palm (PalmPilot or Handheld) during a HotSync session, the HotSync log will appear with a list of each record and what was done with each record. In the example shown below, a calendar event was modified in both places - the HotSync log shows that the record in Amicus (PC record) was overwritten by the record on the Palm (HH).

```
HotSync operation started 06/10/03 18:44:22
OK Memo Pad
OK Address Book
OK To Do List
-- Date Book
  - The following record was modified on both PalmPilot and the Desktop:
    Training w/ Arla (CSG), 6/10/2003, 7:00pm
    The PC record has been overwritten by the HH record.
OK Date Book with 1 message(s)
  -- Backing up db Saved Preferences to file C:\Program
Files\Palm\BerensL\Backup\Saved_Preferences.PRC
OK System
HotSync operation complete 06/10/03 18:44:42
```

- B. Duplicate Records - If you had selected 'Create duplicates' for any of the three conduits on the HotSync Options tab, and there were one or more records that were modified in both Amicus (Palm Desktop) and the Palm (handheld) during a HotSync session, the HotSync log will appear with a list of each duplicate record and a note explaining what happened to the duplicate records. In the example shown below, a contact was modified in both places - the HotSync log shows that both versions now exist in both Amicus and on the Palm. And it is suggested that you 'Delete the unwanted record and perform a HotSync operation again.'

```
HotSync operation started 06/11/03 16:31:59
OK Memo Pad
-- Address Book
  - The following record was modified on both the Palm Desktop and the handheld:
    Berenson, Lori, Productivity Consulting
    Both versions of this record were copied to the Palm Desktop and the
handheld. Delete the unwanted record and perform a HotSync operation again.
OK Address Book with 1 message(s)
OK To Do List
OK Date Book
  -- Backing up db Saved Preferences to file C:\Program
Files\Palm\BerensL\Backup\Saved_Preferences.PRC
OK System
HotSync operation complete 06/11/03 16:32:27
```

2. Duplicate Appointment or ToDo - first check the appointment or To Do in Amicus.

NOTE: It is recommended that the record be modified in Amicus, since you will be able to see if there is any File or Contact information attached to the appointment.

A. If the record in Amicus is exactly the same as the record on the Palm (either no file or contact info, or both with file or contact info), delete either record.

B. If one record has file or contact information, and the other does not, delete the one without the file or contact info.

3. Duplicate Contact - first look at the Contacts Index in Amicus.

A. Sort the Contact index by Name or Company to find the duplicate records. Even if you can see right away which record is old and which is new, you should open probably open up each record and view the brad pages of each.

- i. If one record has linked information (such as a File, Group, Contact Date, events, phone calls or messages), and the other does not, chances are good that the one with the linked information is the good record, and the other record is the duplicate and can be deleted. (See the note below regarding Team Member assignments).
- ii. If both contact records contain linked information, you will need to check the brad pages in each contact record to figure out which contact has the majority of the information (the major record).
 - (1) If there are phone numbers, addresses, e-mail addresses, custom info, etc. in the minor record that are not in the major record, cut and paste that information into the major record - eventually the minor record will have very little information and it will be easy to see which is the major record.
 - (2) If there are events, phone calls, messages, etc. in the minor record that belong to the major record, double click on each minor record and select the correct major record.
 - (3) If the minor contact is linked to a file, you will need to remove that contact from the file, and then add the major record to the file.

NOTE: If the record to be deleted is assigned to multiple Team Members, you will need to remove other Team Members and leave just yourself on the record in order to delete that record.

B. Once you have successfully moved all of the linked information to the major record, you can then delete the minor record, which should no longer have any linked information.

4. After you have successfully cleaned up and deleted any duplicate records, perform the HotSync operation again. Then be sure to verify that the same duplicate records weren't exchanged again.