

# HOW TO PERFORM A SUCCESSFUL HOTSYNC BETWEEN AMICUS AND YOUR PALM

Amicus Version 5.5

## Important Issues / Helpful Hints

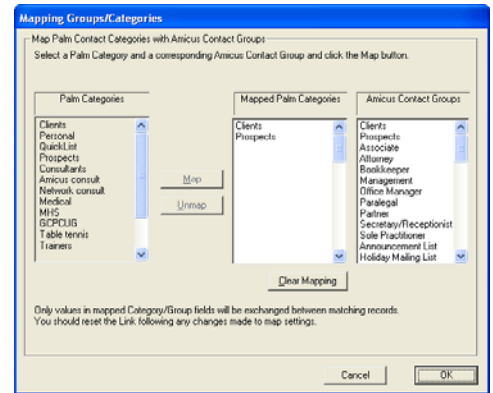
1. Perform the HotSync on a regular basis - get into the habit of performing a HotSync with Amicus first thing in the morning or as soon as you open your Amicus office. Also, perform a HotSync as the last function of the day prior to closing Amicus and/or leaving your office, or anytime you leave the office and may have the need to make changes to any records in your Palm. Be sure to have Amicus open when you perform the HotSync operation.
2. Familiarize yourself with the field mappings and set them carefully - you can now map Amicus fields to Palm fields prior to performing a HotSync; however, since the Palm only has 8 communications fields, and Amicus has 20, many fields from Amicus still will not be transferred to the Palm.
3. **Be Consistent** and **Use the Notes** field - 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., second e-mail address, second address, pager, etc. For example, when you enter a contact's Home e-mail address in Amicus (where the Primary card is the Office card), you may also want to enter it in the 'Notes' field. That way, no matter how you have mapped the communications fields for the HotSync operation, you will always see the Home e-mail address in the 'Notes' field in your Palm.
  - A. Address Fields - Each contact in Amicus can have up to 3 address fields - you can only have 1 address for each contact in the Palm. The address listed in the Primary card in Amicus will, by default, synchronize to the Palm address
  - B. Fixed Fields - Amicus has many communication fields that do not exist, or are not fixed fields, in the Palm - i.e., Cell, Pager, Business 2, Home Fax, etc. **NOTE:** 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 - unless you modify the default labels (see page 6 for more info about default field labels)
  - C. Custom Fields - 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

Amicus Attorney field	Palm field
City (primary)	City
State/Province (primary)	State or Province
Zip/Postal Code (primary)	Zip or postal code
Country (primary)	Country
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

4. Contact Groups / Category Mapping. Palm Categories can now be mapped with Amicus contact groups; however, there is a limit of 15 categories in the Palm (including the QuickList), and there is virtually no limit on the number of contact groups in Amicus. Listed below are things that you will need to know about the mapping. (See page 6 for more information about mapping)

A. After initially upgrading to Amicus 5.5, if you try to set up the mapping of Groups / Categories in the HotSync Manager prior to performing a HotSync operation, the Palm categories will not be recognized. You can set up any of the other HotSync options, but you will have to perform a HotSync in order to map the Groups / Categories the first time. Also, any time you make any changes to the Palm categories or the Amicus contact groups, a message will appear during the next HotSync operation asking you to verify the mapping. The Mapping Groups/Categories window will appear (shown to the right), and you will be able to map existing Palm categories with Amicus contact groups.



B. Unmapped Groups/Categories: Any contacts that come over from Amicus with no contact group will be displayed in the Palm as 'Unfiled'; any contacts that come over from the Palm with no category will be displayed in Amicus with no contact group. (See the section on page 5 for more info about unmapped group / categories.)


C. Multiple Groups (Amicus): If an Amicus contact has more than one group assigned, and you have set the sync options to create or update the Palm contact, only the first contact group assigned in Amicus will be set as the Palm category.

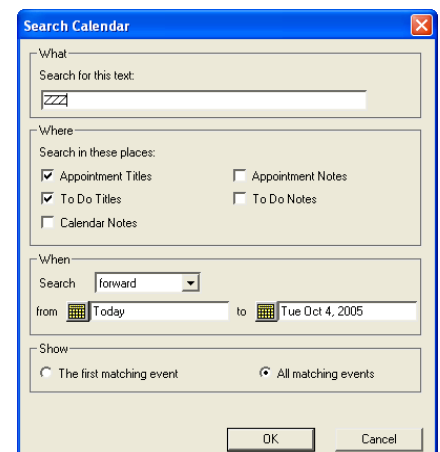
5. Records created on the Palm - Because records that were created on the Palm are **only** brought into **your** Amicus office, you may wish to modify some of these records in Amicus to add other Team Members, attach the record to an Amicus File or Contact, etc. If you think it will be difficult for you to remember which records were created after a HotSync operation is performed, you may want to "flag" records on the Palm to help you easily locate the records.

A. Appointments / To Do's - Include special characters, such as ZZZ or QQ, in the title of a Palm Appointment or To Do.

i. After performing a HotSync, go into the Amicus Calendar and perform a search for 'ZZZ' in the Appointment and To Do Titles - be sure to select 'All matching events' in the Show section.

ii. Modify each Appointment and To Do that appears in the Search Results - remove the ZZZ, and make any other changes, such as:

- (1) Assigning other Team Members
- (2) Select a File and/or Contact to associate with the record
- (3) Selecting a Category for the record
- (4) Setting up Intelligent Assistance (the  button)

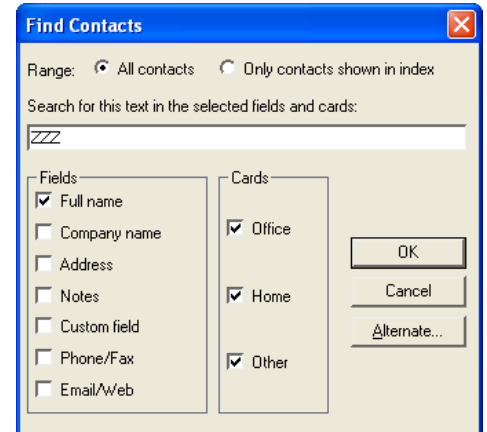


B. Contacts - Include special characters, such as ZZZ or QQ, at the end of a Palm contact's last name (i.e., BerensonZZZ).

i. After performing a HotSync, go into the Amicus Contact Index, and perform a search for 'ZZZ' in the 'Full name' field - you may want to select all three cards

ii. Modify each Contact that appears in the Search Results - remove the ZZZ, and make any other changes, such as:

- (1) Assigning other Team Members
- (2) Select a File and/or Contact to associate with the record
- (3) Creating Contact Relationships with other Amicus contacts
- (4) Adding custom information for the contact



6. 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 Phone' 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. You forgot to modify the mapping so that the 'Other' field in the Palm is mapped to the 'Cell Phone' field in Amicus.

## Customizing the HotSync Actions & Options

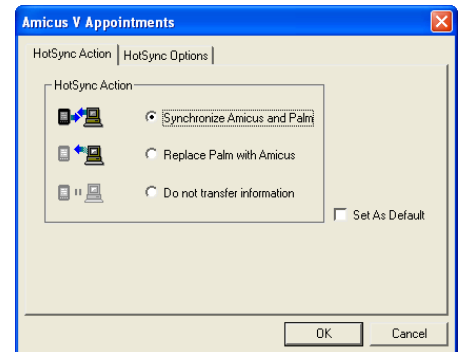
Before you are ready to synchronize data, be sure that the HotSync Manager icon is open - if it is not displayed on the Taskbar, select Start - Programs - Palm Desktop - HotSync Manager.

Default selections will be used if the HotSync Manager is not modified when a HotSync is performed.

**NOTE:** The HotSync Problem window will open if any problems were encountered during the HotSync process (such as duplicate records modified in both Amicus and Palm). See page 8 for information on Checking the Log - Cleaning up Duplicates. Read pages 1-3 for helpful hints on avoiding duplicates or lost data.

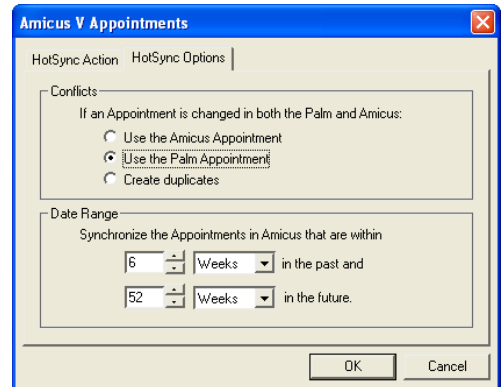
### 1. Amicus Appointments

- A. If you need to change any of the Actions and/or Options, 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 Palm'.
  - '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 make a few decisions regarding the Appointment Sync options.
- Conflicts - what to do if an appointment record is changed in **both** the Palm and Amicus.

**NOTE:** The only time that this option will be important is if an existing appointment record is modified in Amicus and the same existing appointment record is modified on the Palm prior to a HotSync being performed. You must actually change a record in the Palm or Amicus for it to be flagged as 'changed' - if you just view a record without making a change, it will not be flagged as 'changed'.

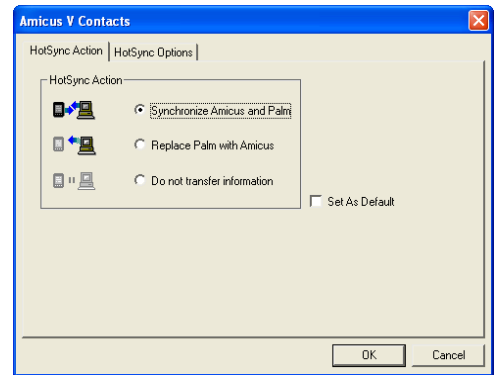


- (1) 'Use the Amicus appointment' - if you normally create or modify appointments in Amicus, select this option as the default.
  - (2) 'Use the Palm appointment' - if you normally create or modify appointments on your Palm, select this option as the default.
  - (3) 'Create duplicates' - if there is 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).
- ii. Date Range - specify the number of Weeks (or Days) in the past and future of Appointments to include in the synchronization

## 2. Amicus Contacts

A. If you need to change any of the Actions and/or Options, click on the HotSync Manager (🔄) icon and select Custom.

- i. Double-click on the Contacts conduit to see the HotSync Action selections. In most cases, leave the default 'Synchronize Amicus and Palm'.
- ii. '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).

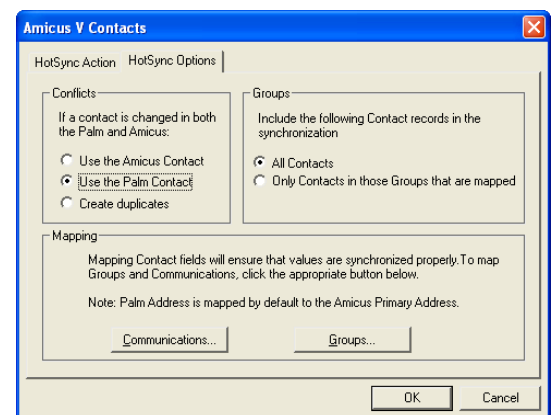


B. Click on the HotSync Options tab. Now you need to make a few decisions regarding the Contact Sync options.

- i. Conflicts - what to do if a contact's record is changed in **both** the Palm and Amicus.

**NOTE:** You must actually change a record in the Palm or Amicus for it to be flagged as 'changed' - if you just view a record without making a change, it will not be flagged as 'changed'.

- (1) 'Use the Amicus contact' - if you normally create or modify contacts in Amicus, select this option as the default.
- (2) 'Use the Palm contact' - if you normally create or modify contacts on your Palm, select this option as the default.
- (3) '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).

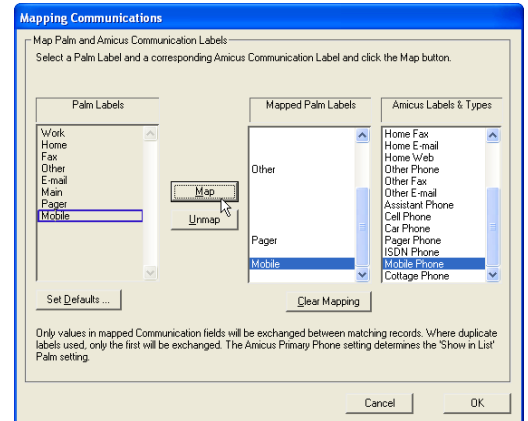


- ii. Groups - you can determine whether to synchronize:

- (1) All contacts - unmapped items will be handled as follows:
  - (a) If a new Amicus contact has a Contact Group that is not mapped to a Palm Category, a new Palm contact will be created with no Category (will be displayed under 'Unfiled' or 'All')
  - (b) If a new Palm contact has a Category that is not mapped to an Amicus Contact Group, a new Amicus contact will be created with no Contact Group.
- (2) Only Contacts in those Groups that are mapped - unmapped items will be handled as follows:
  - (a) If a new Amicus contact has a Contact Group that is not mapped to a Palm Category, a new Palm contact will **NOT** be created
  - (b) If a new Palm contact has a Category that is not mapped to an Amicus Contact Group, a new Amicus contact will **NOT** be created.
- (3) Multiple Groups (Amicus): If an Amicus contact has more than one group assigned, and you have set the sync options to create or update the Palm contact, only the first contact group assigned in Amicus will be set as the Palm category.

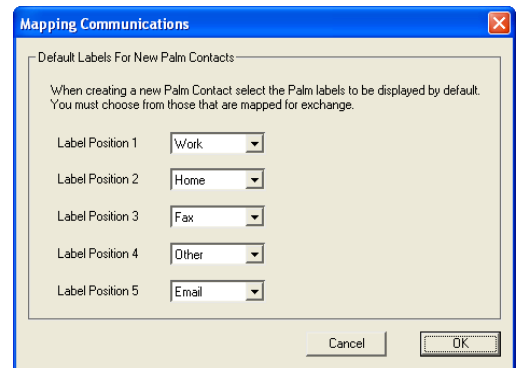
iii. **Mapping** - Palm has eight standard communication labels, although only five can be displayed as defaults on a contact record. You can modify the mapping for each of the eight labels, and modify the default labels that appear.

(1) **Communications** - For example, by default, the 'Business Phone' field for an Amicus contact record is mapped to the 'Work' phone field in Palm, and the 'Other' field for an Amicus contact record is mapped to the 'Other' phone field in Palm. You may want to display the 'Mobile' label on the Palm (see #2 below), and set the mapping so that the 'Mobile' Palm label is mapped to the 'Cell Phone' field in Amicus.



(2) **Set Defaults** - You can decide which Palm labels will be displayed by default.

(a) If a contact displays the same label in more than one field, the subsequent fields with the same label are ignored.



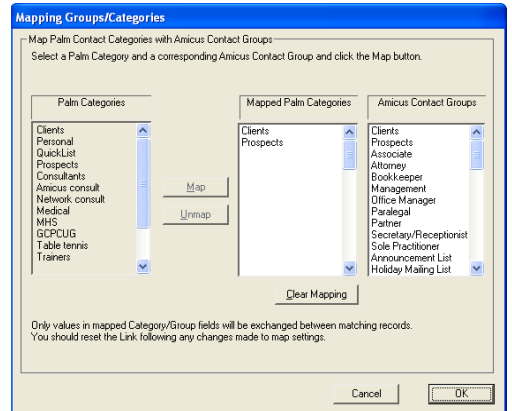
(3) **Groups (Categories)** - You can now map Amicus Contact Groups with Palm Categories.

(a) The Palm has a limit of 15 Categories that can be created (including the QuickList)

(b) Amicus has no limit to the number of Contact Groups that can be created.

(c) Once you have created your Categories on your Palm, you will be able to map each Palm Category with a specific Amicus Contact Group.

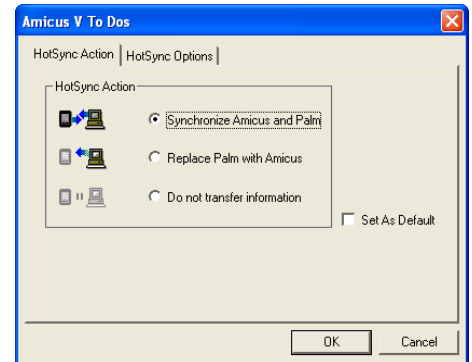
(d) It is recommended that you reset the link after changing any mapping - for more information about resetting the Palm link, see the Palm Help information under Companion Products Help in your Amicus Attorney Office Help menu.



### 3. Amicus To Do's

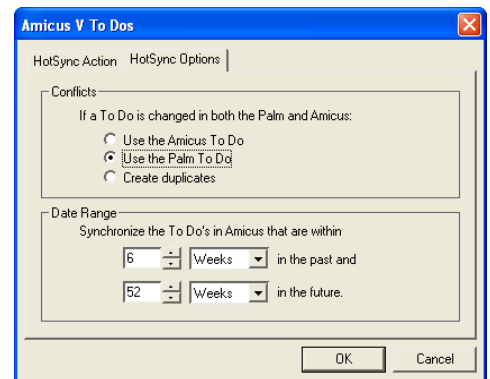
A. If you need to change any of the Actions and/or Options, click on the HotSync Manager (🔄) icon and select Custom.

- i. Double-click on the To Dos conduit to see the HotSync Action selections. In most cases, leave the default 'Synchronize Amicus and Palm'.
- ii. 'Set as Default' should only be checked if you wish to change the default for the entire To Dos 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 To Do is changed in both the Palm and Amicus.

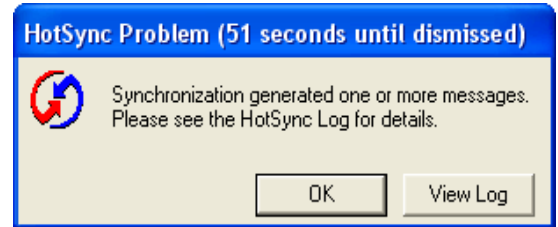
- i. 'Use the Amicus to-do' - if you normally create or modify To Do's in Amicus, select this option as the default.
- ii. 'Use the Palm To Do' - if you normally create or modify To Do's on your Palm, select this option as the default.
- iii. 'Create duplicates' - if there is a possibility that you may have "edited" one or more To Do'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).



## 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 (referred to as 'Desktop' or 'Palm Desktop') and the Palm (referred to as 'Palm' or 'Handheld') during a HotSync session, the HotSync log will appear with a list of 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 10/02/04 01:01:31
OK Memo Pad
-- Date Book
  - The following record was modified on both PalmPilot and the Desktop:
    Reset odometer, 10/1/2004, Untimed
    The PC record has been overwritten by the HH record.
OK Date Book with 1 message(s)
OK Address Book
OK To Do List
```

- 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 (referred to as 'Palm Desktop') and the Palm (referred to as '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.
  - i. 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 10/04/04 14:20:08
OK Memo Pad
OK Date Book
OK Address Book
-- To Do List
  - The following record was modified on both the Palm Desktop and the handheld:
    Update Amicus - Palm, Due: 10/7/2004, Priority: 1
    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 To Do List with 1 message(s)
```

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.