

U S E R ' S G U I D E

AGENDUS FOR PALM OS **PROFESSIONAL & STANDARD EDITIONS,** **VERSION 8**



Advancing your handheld experience

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INTRODUCTION

Agendus Overview

This guide describes *iambic* Agendus for Palm OS, version 8, for the Palm Computing Platform®. This software is designed to make it easier for you to schedule and manage your time. Agendus complements the native Palm OS applications, providing you with an efficient and simple way to view and organize your busy day. Whether you are a professional, business person, or just someone who needs more control of your time, we hope you find Agendus to be the ideal tool.

Agendus Professional and Standard Editions

Agendus is available in two editions, Professional and Standard. Agendus Pro includes all of the features from the standard edition and adds several advanced features:

- Integrated email capability for both sending and receiving email via hotsync as well as directly on the device via dialup, wireless modem, bluetooth, IR to mobile phone, or cable to mobile phone (requires a Palm OS email client, such as AgendusMail, available for free download to registered Agendus Pro users, and a compatible Palm device)
- Additional and customizable date range filters in the To Do views
- Additional half-list quarter view and To Do tree view
- Schedule calls/meetings/To Dos on received email messages
- Support for saving VCAL and VCARD items received via e-mail as new entries in the calendar or contact list
- “Add to contacts” functionality on received email items
- Mapping integration with Mapopolis

To upgrade to Agendus Professional please visit www.iambic.com/agenduspro/palmos/.

Take Control of Your Schedule

You can now easily view more of your schedule on your handheld device. All of your scheduled phone calls, meetings and To Dos are shown together in the different calendar views—change between day, week, month, quarter and list views with a single tap. Make the information easier to read at a glance by having Agendus add colors and icons to specific items, whole categories, or to items that use specified key words.



Agendus version 8 Professional Edition includes all of these benefits:

- **Never miss an important commitment again:** With Agendus, your meetings and To Dos are displayed together, so there is no need to switch between different views to review all of your important commitments.
- **Works with the standard Palm applications:** Agendus uses the same databases as the standard Palm OS address book, date book, and To Do list. Every contact or event scheduled with Agendus will appear in the appropriate application, and contacts or events from those applications will appear in Agendus.
- **Email integration:** Email capabilities are tightly integrated into this professional edition, so you can check, send, read, create, file and delete email in your email application without ever leaving Agendus. Additionally you can see your emails in the contact history screen, add email senders to your contact list, import vcard contact information and vcal events from attachments right into Agendus.

Take Advantage of your Palm Device

Agendus makes full use of your Palm device. If you have a Treo or other smartphone, then you can dial your contacts from within Agendus. If your device has a color screen, then Agendus will offer options for adding highlight colors to your appointments.

In most cases, Agendus will only display menu items, buttons, and options if they are supported by your device.

Treo Support

In addition to the DPad capabilities listed on page 18, Agendus will take advantage of other Treo capabilities, such as dialing contacts or sending email or SMS messages directly from Agendus.

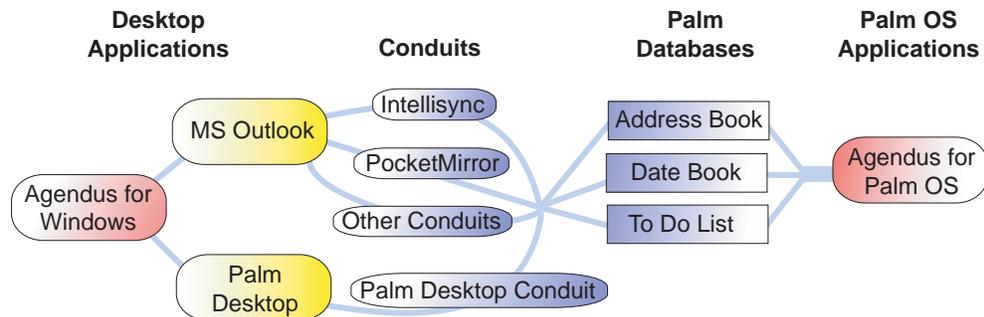
Agendus Integration with Palm Applications

Agendus uses the same data files as the native Palm OS Date Book, To Do List, and Address Book. The Agendus calendar views will show all scheduled commitments, including meetings and To Dos, entered in the handheld device’s Datebook and To Do applications, as well as items scheduled using Agendus. Commitments scheduled using Agendus are written directly to the handheld device’s Date Book or To Do list. Similarly, contacts from the Palm Address Book will show up in Agendus and contacts entered in Agendus will show up in the Palm Address Book.

Since the Palm OS does not have a separate application for scheduling phone calls, Agendus saves calls as a category of To Do named “Calls.” All phone calls created using Agendus are stored as To Dos and put in the “calls” category.

Important: Because Agendus uses the built-in handheld device applications to store data, it will not interfere with any third-party desktop contact managers or synchronization conduits. If you are using Time Matters, Act! Palm Link, Companion Link, or Intelisync, you should set the Agendus storage format so it will sync properly with your software. See page 56.

Note: Pictures assigned in Agendus will not appear on the Palm desktop or in the native Palm address book. Birthdays assigned in the contact list will only appear in the date book of compatible devices, such as the Tungsten T3 or Tungsten E.



Supported Screen Resolutions

In addition to the standard resolution of 160 by 160 pixels, Agendus can display in high resolution (320 x 320 pixels) on devices that support it. Agendus also supports devices with high-resolution portrait (320 x 480 pixels) and landscape (480 x 320 pixels) displays.

Devices that support high resolution include all Sony Clie models and all Palm OS 5 high-density capable devices. High-resolution portrait mode is supported by Sony NR, NX, and NZ and the PalmOne Tungsten T3. High-resolution landscape mode is supported by the Sony UX and PalmOne Tungsten T3

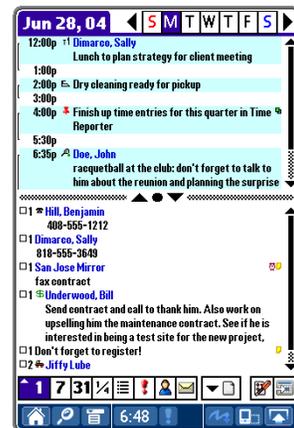
The following images demonstrate how the different screen resolutions allow you to see more of your data at one time.



Standard resolution



High resolution



Portrait mode



Landscape mode

Tip: Choosing smaller fonts will also allow you to see more of your schedule

About iambic

iambic strives to make the best business tools possible for Palm OS devices. We welcome your suggestions and comments. You can submit feature requests via www.iambic.com/support. If you enjoy the program, then by all means please tell your friends and associates; better yet, beam them a demo!

INSTALLING AGENDUS

System Requirements

The minimum requirements for installing Agendus on your handheld include:

- Palm device with Palm OS 3.0 or higher
- 900KB available memory

There are additional requirements depending on which features you would like to use.

- **Photos:** Many photo capabilities, such as attaching GIF or JPEG images to contact names, require Palm OS 5.0 or later.
- **Email:** Emailing capabilities require a Palm OS email client, such as AgendusMail (available for free to registered Agendus Pro users), SnapperMail, or VersaMail. Please see the documentation for your email client for additional device requirements.
- **SMS Messaging:** Requires Palm OS 4.1 or higher with Telephony support or a Treo or VisorPhone.
- **Wallpaper converter:** The wallpaper converter, an optional component for converting GIF images so they can be stored on your device without using a memory card, requires a PC with Windows 98 or higher and 25KB of space on your PC. See page 64 for more information.

Upgrading from Earlier Versions of Agendus

Agendus version 8 is available at a discounted price for owners of earlier versions of Agendus or ActionNames Datebook. Please visit www.iambic.com/upgrade/ for complete information and upgrade options.

Install Agendus 8 over your existing version of Agendus, unless you are using version 3.0 or earlier, in which case you'll want to uninstall this older version before installing version 8.

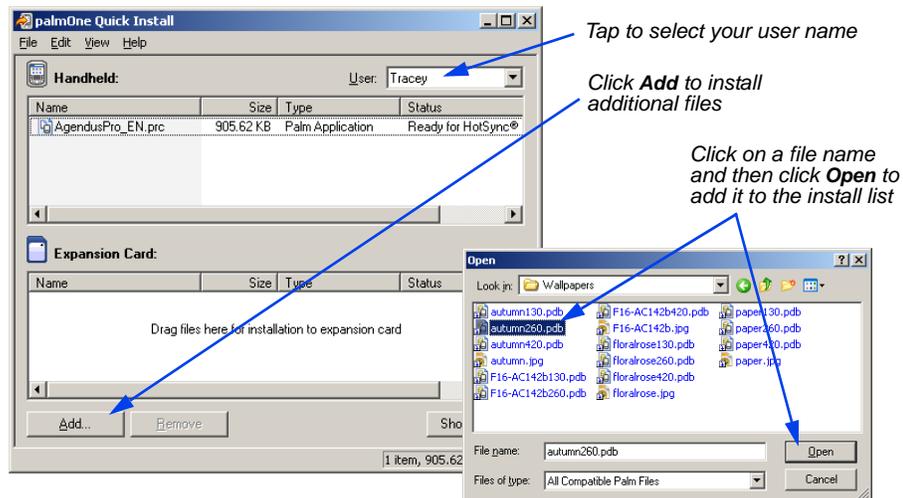
Installing Agendus for Palm OS

The installation files included with Agendus include several optional files, such as wallpaper images and icons, in addition to the Agendus application. There are also several files which you may be required install, if you want to attach photos to your contacts and events, or if you are using a Tungsten T3.

1. Using Windows Explorer or the Macintosh Finder, navigate to the folder where you downloaded the compressed Agendus installation file (for the English-language versions, the files are **agenduspalmospro_en.zip** for Agendus Pro or **agenduspalmosstd_en.zip** for Agendus standard edition.).

Note: If you have purchased Agendus on a CD, please use the install wizard included on the CD.

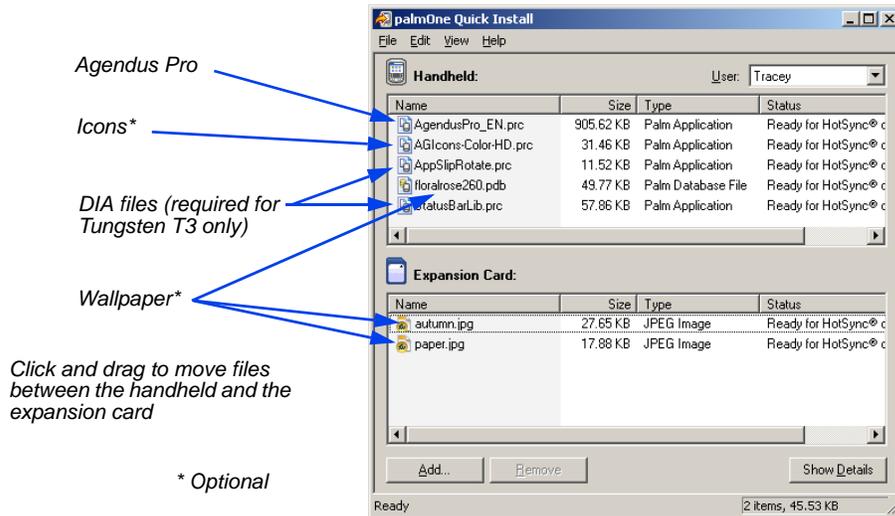
2. Using a utility such as Winzip (Windows) or StuffIt (Macintosh), extract the files to a folder on your computer. You should set the utility to use folder names when extracting the files.
3. Navigate to the folder with the extracted files.
4. Double click on the Agendus PRC file (**AgendusPro_EN.prc** or **AgendusStd_EN.prc**) to open the palmOne Quick Install tool with Agendus added to the install list.



5. Select your Palm user name from the User list.
6. **Tungsten T3:** Agendus requires additional files for compatibility with the T3's dynamic input area (DIA). In the install tool, click **Add**, go to the TungstenT3Only folder, select the AppSlipRotate.prc file, and click **Open**. Click **Add** again, select the StatusBarLib.prc file, and click **Open**.
7. **Optional:** Several optional files are available for you to install. You can install them at the same time as Agendus or install them later:
 - PhotoLibrary Files (for Tungsten T3 and Tungsten E only) (see page 11)

- Icon sets (see page 12)
- Wallpaper images (see page 13)

Note: If you already have an installed icon set named Icons-Iambic, then installing one of the icon sets included with Agendus will overwrite that existing set: any customized icons you have made will be lost.



8. Click **Done**.
9. Hotsync  your Palm device.
10. After synchronization, tap on the Palm device's **Home** button . The Agendus icon will probably be the first icon on the screen that now appears. Tap the Agendus icon to start Agendus.

After the hotsync, the Agendus icon will appear in your device's application list



Note: When you first install Agendus, you will be able to run it for three days without a demo or activation code. To obtain a limited-time demo code, you will need to access this web page: www.iambic.com/agenduspro/palmos/. To purchase the software, access this web page: www.iambic.com/store/.

Installing PalmPhotos (Tungsten T3 and Tungsten E Only)

PalmOne has created photo library files which will allow you to copy JPEG and GIF image files to your Palm device's memory (RAM), saving space on your memory card. You can then use these photos as wallpaper or assign them to contacts or tasks.

Note: These files are for Tungsten T3 and Tungsten E devices only. Newer devices, such as the Zire 72, have this capability built in, and older devices are not compatible.

1. Locate the folder where you extracted the Agendus installation files.
2. Open the **PalmOnePhotoLib.zip** file.
3. Extract the photo library files.
4. Open the folder where you extracted these files.
5. Double-click on the **PalmPhotoLib.prc** file to add it to open the Palm installer and add the file to the install queue.
6. Click **Add** in the installer and add the **PalmPhotoConvert.prc** file.
7. Click **Add** in the installer and add the appropriate language file (**PalmPhotoLib_enUS.prc** for English).
8. Click **Done**.
9. Hotsync  your Palm device.

Installing Icon Sets (Optional)

In Agendus, you can assign icons to meetings, events, To Dos, and calls. A free set of icons is included with Agendus. You can also install additional sets available separately from iambic (see www.iambic.com) or from another vendor. You can have multiple icons sets installed at the same time.

Note: If you are upgrading from a previous version of Agendus and already have an installed icon set named Icons-Iambic, then installing one of the free icon sets will overwrite that existing set: any customized icons you have made will be lost.

To install the included free icon set:

1. Open the folder where you extracted the Agendus files.
2. Open the sub-folder named Free Icons
3. Double-click on the appropriate icon set in the Free Icons folder to add it to the Palm install queue:
 - For Palm devices that display in High Density, including most Palm OS 5 models (except for the Treo 600), install **AGIcons-Color-HD.prc**.
 - For Palm devices that display in color at normal density, including all color devices with Palm OS 4.x and earlier, install **AGIcons-Color.prc**.
 - For Palm devices with monochrome screens, install **AGIcons-BW.prc**.

Note: These three files all contain the same icon set, optimized for different screen types, and share the same icon set name; only one of these sets can be installed at a time.

4. In the Palm Install tool, click **Done**.
5. Hotsync  your Palm device.

Installing Wallpaper Images (Optional)

Agendus supports the use of wallpaper images as backgrounds in many of the Agendus views. Several free wallpapers are included with Agendus in several formats.

To install wallpaper images:

1. Start the palmOne Quick Install Tool.
2. Click **Add**.
3. Open the folder where you extracted the Agendus files.
4. Open the sub-folder named Wallpapers
5. Click on the appropriate wallpaper file you would like to install and click **Open** to add it to the Palm install queue:
 - For Palm devices that support memory cards, select GIF or JPEG files. You can also select GIF or JPEG files if you are using a PalmOne Zire 21, Zire 31, or Zire 72, or if you are using a Tungsten T3 or Tungsten E and you have installed the PalmPhotos library files.
 - For Palm devices with high-density portrait or landscape displays, select files that end with “420.pdb.”
 - For Palm devices with high-density displays, select files that end with “260.pdb.”
 - For Palm devices with normal-density displays, select files that end with “130.pdb.”
6. In the Quick Install tool, make sure that the wallpaper file is set to the right destination. Click and drag a filename to either the handheld or the expansion card to change it's destination:
 - For most devices, install GIF and JPEG files to the expansion card.
 - For PalmOne Zire 21, Zire 31, or Zire 72, or if you are using a Tungsten T3 or Tungsten E and you have installed the PalmPhotos library files, you can install GIF and JPEG files to the handheld or to an expansion card.
 - PDB files can be installed to the handheld or to the expansion card.
7. If you would like to install more than one wallpaper image, click **Add** and repeat steps 3 through 6.
8. In the Quick Install tool, click **Done**.
9. Hotsync  your Palm device.

Installing AgendusMail (Optional)

AgendusMail is an email client which can be tightly integrated with Agendus Pro. Beginning with Agendus version 8, AgendusMail is available as a separate download. If you purchase and register Agendus Pro, AgendusMail will automatically be registered at no additional cost. AgendusMail is available for download at www.iambic.com/email/palmos.

For detailed information on installing and using AgendusMail, please see the documentation included with AgendusMail.

Note: With Agendus Pro version 8, you do not need to use AgendusMail to integrate email functions with Agendus. You can assign any email client by changing the Agendus Pro communication settings (see page 60).

Installing MakeSpot (Optional)

MakeSpot is a utility which will allow you to quickly add colors to days in the month views in Agendus. For example, you can make all Sundays have a blue background. Make Spot can also add a color to all the national holidays at once.

1. Locate the folder where you extracted the Agendus installation files.
2. Open the **MakeSpot.zip** file.
3. Extract the MakeSpot PRC file for your language (**MakeSpot_usa.prc** for English).
4. Open the folder where you extracted this file.
5. Double-click on the MakeSpot PRC file to add it to open the Palm installer with the file added to the install queue.
6. Click **Done**.
7. Hotsync  your Palm device.

Please see the documentation included with MakeSpot for more information.

Entering Demo and Activation Codes

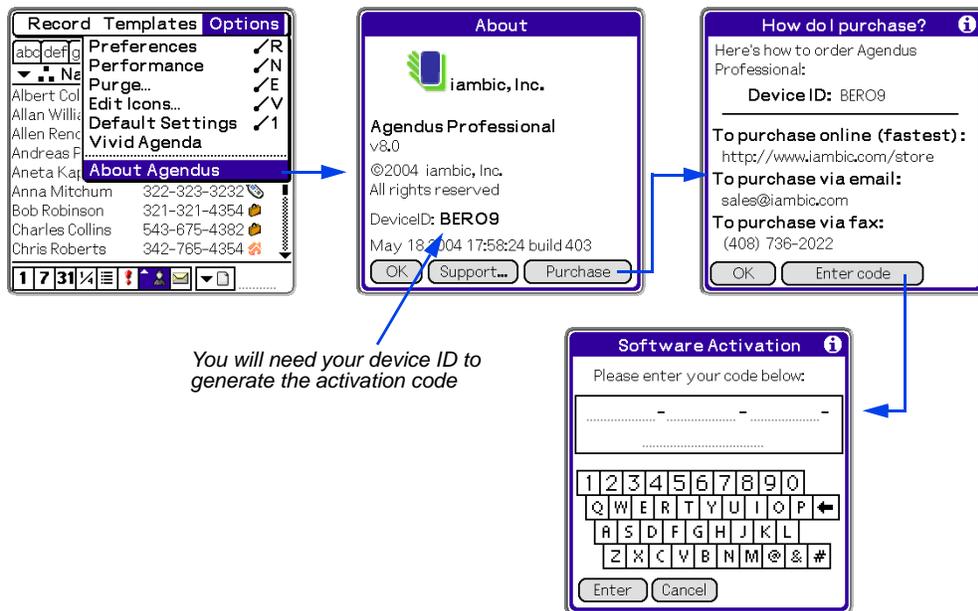
When you first install Agendus, you will be able to run it for three days before you will need to enter a demo or activation code.

Please visit www.iambic.com to request a demo code that will allow Agendus to run for a limited time. iambic will send the demo code via email. Then follow the steps below to enter the code

If you have purchased directly from iambic, PalmGear, Handango or another online partner, all you need to do is follow the instructions from the email you received. Otherwise visit www.iambic.com/myiambic to register your purchase.

In order to get an activation code, you'll need to register your purchase using the Device ID shown on the About screen of Agendus. This will generate an activation code specific to your Palm device.

Tap the **Menu** button  to access the Agendus menu bar. The menu button is located to the left of the graffiti field at the bottom of your Palm device



You will need your device ID to generate the activation code

1. Start Agendus.
2. Click on the Palm device's **Menu** button  to view the menu bar.
3. From the **Options** menu, select **About Agendus** to open the About box. This is where you will find your Device ID.
4. Tap on **Purchase** to open the "How do I purchase?" box.
5. Tap on **Enter Code** to open the Software Registration box.
6. Enter your activation or demo code in this box and tap **Enter**.

GETTING STARTED WITH AGENDUS

Navigating Agendus

Most of the common features in Agendus can be reached within a few taps using the toolbar and main screen.

You can tell what view you are in by the darkened box

*Tap the **Menu** button to view the Agendus menu bar*

Assign buttons so they can launch Agendus

Use the scroll buttons or directional pad to scroll through the different views

Change the date range

Tap on an item to view its details or edit it
Tap and hold on an item to view a menu of options

Agendus Toolbar

Tap on a view button on the toolbar to switch to that view. Tap the same button again to change modes:

1 Agenda - 3 modes	List - 1 mode
7 Week - 4 modes	To Do - 2 modes*
31 Month - 4 modes	Contact - 3 modes
1/4 Quarter - 2 modes*	Email*

Create a new meeting, To Do, call, or contact
 Show the display and font options
 Go to today's date (calendar views)

* Agendus Standard only supports one mode for Quarter and To Do views. Email is only available in Agendus Pro.

Agendus has many features to make common tasks even easier:

- **Tap-and-Hold shortcut menus:** In any view you can tap and hold the stylus on a meeting, call, To Do or contact to get a context-sensitive shortcut menu of actions that can be performed on that item.

For devices with directional pads, such as the Tungsten and Treo, holding the center button down on a selected item will open the shortcut menu.



Note: The items listed depend on the item tapped and the capabilities of your Palm device. For example, mapping is only available if you have Mapopolis installed, and dialing is only available for dialing-enabled devices

Tap and hold on a meeting, call, To Do or contact to open a shortcut menu of actions for that item

- **Templates:** Save common meeting settings (times, attendees, locations) as templates so you won't have to enter them every time you create a new meeting (page 45).
- **Default colors and icons by category:** Set a default highlight color and icon for different categories of meetings, To Dos, and calls; set default highlight colors for contact categories (page 65).
- **Default icons by keywords:** Use Vivid Agenda™ to set default icons based on keywords in meetings, To Dos, and calls (page 52).
- **Hard buttons:** Assign the buttons on your Palm device to start Agenda and open it in the last view or in a specific view (page 61).

Using the Scroll buttons

You can use the scroll buttons on your Palm device to scroll through your calendar. For example, if you are in the list view, press down on the scroll button to view commitments that don't fit on the screen. When you have scrolled to the top or bottom of a view, press up or down to change to the previous or next date range.



Current date range

If the current view shows a scrollbar, then the scroll buttons will scroll up or down in that view

When you reach the top or bottom of a view, or if there are no scroll bars, then the scroll buttons will change the view to show the previous or next date range

Scroll buttons

Navigating with the Directional Pad

Along with scroll buttons found on most Palm devices, Agendus includes enhanced support for directional pads (DPads) found on devices such as the Tungsten and Treo.



There are four DPad modes in Agendus which will affect how the DPad functions. The four modes are object mode, scroll mode, select mode, and edit mode.

Object Mode (Treo Only)

Object mode is only available on the Treo. This is the initial mode when you switch to a new view. In this mode, the DPad directions will move the focus around different items on the screen, such as between buttons on the toolbar or between **OK** and **Cancel** buttons in a preference screen. Clicking the select button in object mode will either take you to scroll mode, if the focus is on a scrollable object, or to select mode.

In **Preferences | Miscellaneous** you can turn off this mode and just use the DPad as described below.

Scroll Mode

Scroll mode is the initial mode when you switch views on Tungsten devices. In this mode, anytime a list or table is too long to fit the screen, the up and down buttons will scroll up or down in the list. If supported by the view you are in, the left and right buttons will show the previous or next list or table. For example, in the month views, the left and right buttons will switch to the previous or next month.

Select Mode

Select mode applies to tables and lists. It allows you to select individual table cells or list items using the DPad. For example, this works in the Contact List view to move

between names and numbers, in the Month view for moving between days, or in the To Do view for moving between To Do items and between the columns of each To Do.

The up and down buttons will move up and down in the list; if there are no more items, it will switch Agendus to scroll mode.

The left and right buttons will move left and right to the previous or next cell or column. If there are no more items to the left, then the left button will switch Agendus to scroll mode. If there are no more items to the right, then the right button will open the item.

If applicable, pressing and holding the select button will open a shortcut menu for the selected item (this is the same as the shortcut menu that would open if you tap and hold your stylus on the same item). Pressing and releasing the select button will switch Agendus to the edit mode.

Edit Mode

Edit mode is available for the To Do view only. Edit mode allows the in-place editing of To Dos and calls available in the To Do views.

The up and down buttons will move to the previous or next item. For example, move between the description lines in the selected To Do, as well as move between To Do items. If there are no more items, then this will return Agendus to scroll mode.

The right and left buttons will move the cursor left or right if you are editing a text field, such as the description. Otherwise it will return Agendus to select mode.

The select button will open the current item.

Navigating with Menus

Many Agendus features and functions can be accessed in a variety of ways: tap a toolbar button, select it from a menu, or select it from a tap and hold shortcut menu. There are also several functions in Agendus that can only be accomplished with a drop down menu or the shortcut menu.

There are different sets of menus and menu items depending on which view and which mode you are viewing, and depending on the type of device you are using.

Open the menu bar by tapping the Palm device's menu button  or by tapping the highlighted area at the top of the screen. Tap a menu heading to view the drop-down menu.



After you open the drop-down menu, enable the specific Agendus function by tapping the menu choice

Note: Save time by using shortcut commands, particularly editing commands like cut, copy, paste, and select all. Shortcut commands are graffiti commands that are shortcuts to menu items. The commands are displayed next to their associated menu items.

Agendus Views

One of the key benefits of Agendus is being able to see your entire schedule of commitments on one screen. There are four different views that are readily accessed by tapping the numbered buttons at the bottom left of any of the views.

- | | |
|---------------------------|---------------|
| Agenda (single-day) views | List view |
| Week views | To Do views |
| Month views | Contact views |
| Quarter views | |

After tapping once on your desired view button, you can change the mode of that view by tapping on the same button and then selecting the mode from the list that pops up.

In every view, Agendus uses icons to give you more information about the items shown.



Agendus uses several icons in addition to the icons you can assign to meetings or tasks:

- Birthday (from contact information)
- Alarm set for this item
- Attached note (tap icon to open note)
- Due task (appears with due date)
- Repeating meeting or task
- Roll-over meeting

You can change key elements of listed items without changing to a different view. For example, change a task's priority by tapping on the item's priority number, mark an item as complete by tapping on its checkbox, or edit an item's attached note by tapping on its note icon.

Tap-and-hold shortcuts available in every view allow you to work more efficiently: tap and hold your stylus on an item to pop up a shortcut menu of common actions for the item, such as adding a selected contact to a new meeting or scheduling a follow up for a selected meeting.

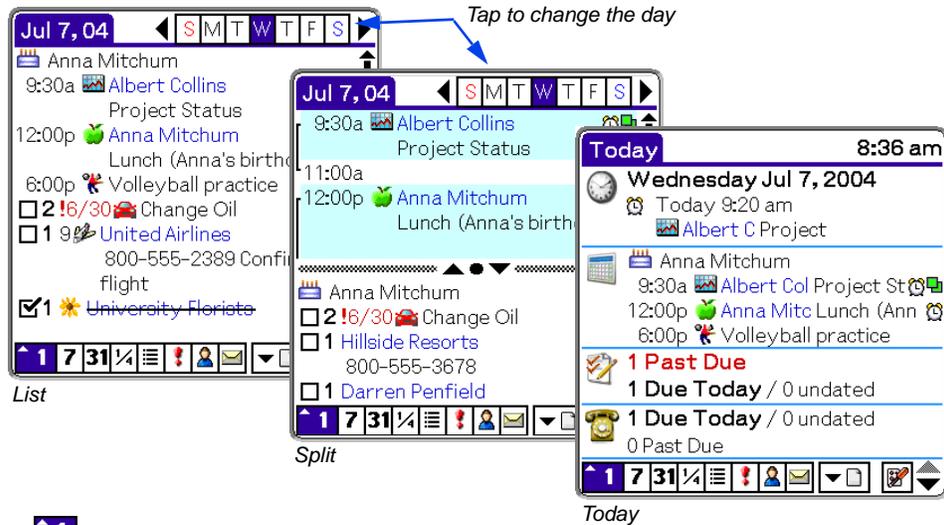
Agenda (One-Day) Views: Today, List, and Split

Agendus supports three modes for the Agenda (one-day) view:

- **List:** Past-due calls and To Dos are shown first, followed by today's commitments, followed by undated and future commitments. Past-due commitments (if there are any) will be recognizable by an exclamation point and date appearing before the contact name.
- **Split:** Meetings are shown on the top portion of the screen and To Dos and calls are on the bottom portion. Each of the two sections has independent scroll bars which are available when the scheduled items exceed the length of the display. The second half shows phone calls in priority order with To Dos in priority order.
- **Today:** Quickly see what is scheduled for the rest of today, including the next alarm, a summary of To Dos and calls, a summary of email and SMS messages, and the quote of the day. Meetings scheduled earlier in the day are not displayed in this view. Tap **Show Options**  in this view to choose which items to display and what order to display them.

To select one of the Agenda views:

1. Tap on the  button in the toolbar to switch to the last-used Agenda view.
2. Tap on the  button again to pop up the list of modes.
3. Tap on the mode you want to view.



-  Change modes
-  Go to current day (List and Split modes)
-  Show filter and display options

Tap and hold on an item to open a menu of actions for the item

Split mode: Tap and drag the divider or tap the arrows to change the split

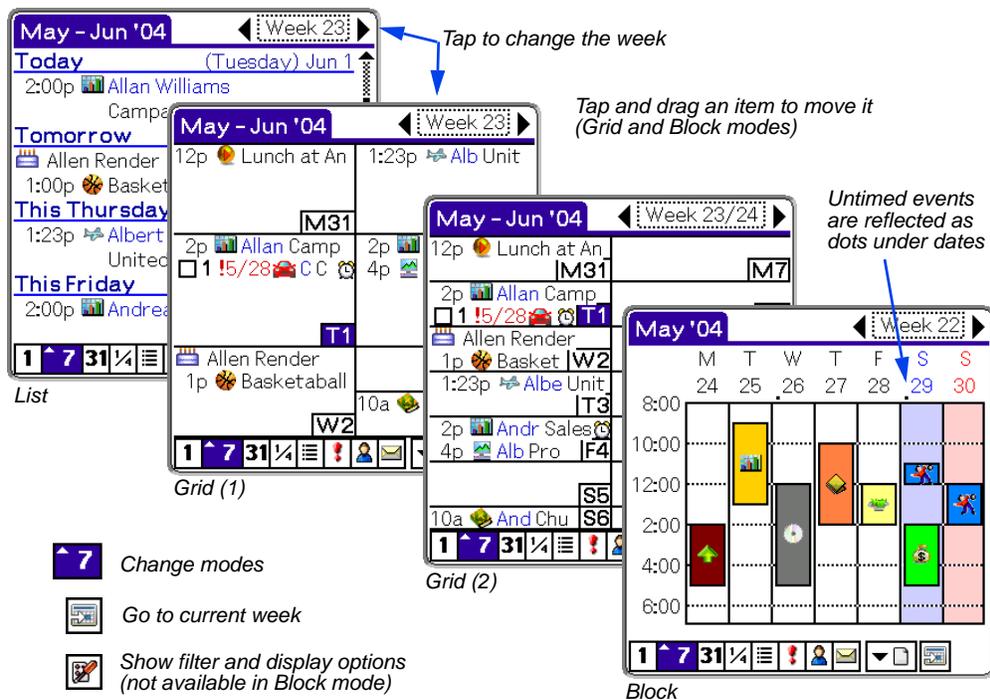
Week Views: List, Grid and Block

Agendus supports four modes for the Week view:

- **List:** Chronological list of the days of the week showing meetings, To Dos, and calls. Only days with commitments are included in the list.
- **Grid (1):** Grid view of all of the days of the selected week, showing all meetings and To Dos for the week.
- **Grid (2):** Grid view showing two weeks at once.
- **Block:** Graphic display of meetings for the selected week. Untimed meetings are reflected as dots below the dates. Tap on a block to view a pop up with the meeting details; tap on the **Edit** button in the pop up to open the meeting or tap on the pop up to close it. To Dos and calls are not reflected in this view.

To select one of the Week views:

1. Tap on the **7** button in the toolbar to switch to the last-used Week view.
2. Tap on the **7** button again to pop up the list of modes.
3. Tap on the mode you want to view.



List and Grid modes: Tap an item to view or edit details; Tap and hold for a shortcut menu

Block mode: Tap a block to pop up details; tap **Edit** button in pop-up to edit it or tap pop up to close it

All modes: Tap a date to switch to agenda view

Add highlight colors by category (page 65)

Set weeks to start on Sundays or Mondays by setting your Palm Device's Preferences

Note: In the Week List view, past-due tasks (To Dos and calls) appear in a Past Due section at the top of the list, and undated commitments appear in a separate "No Date" section. In the Grid modes, past-due and undated tasks appear on today's date.

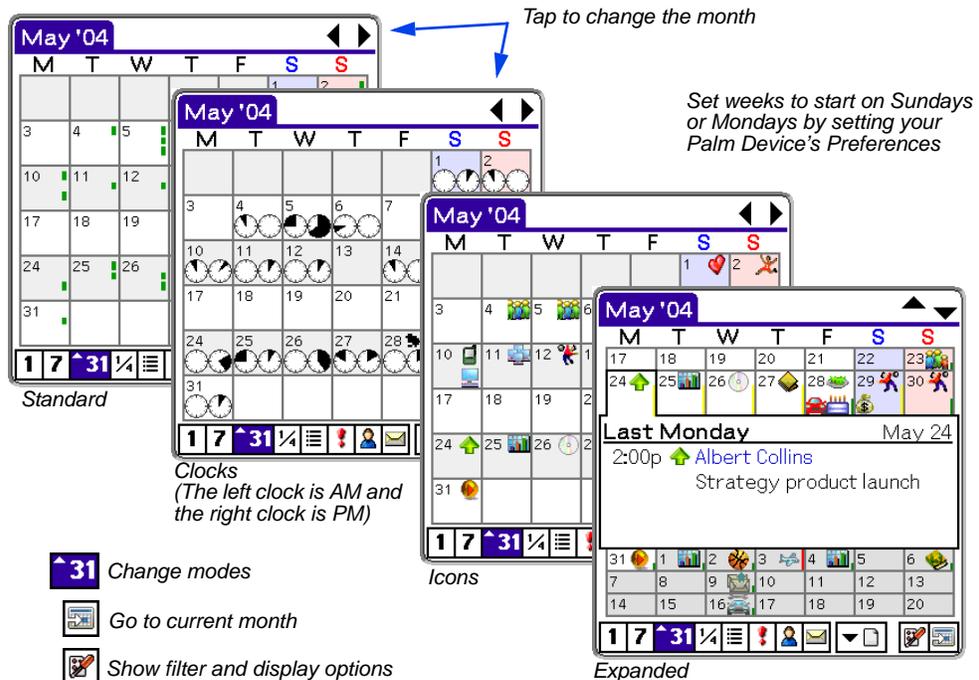
Month Views: Standard, Clocks, Icons, and Expanded

Agendus supports four modes for the Month view:

- **Standard:** Displays indicators on each day corresponding to different meeting types: untimed meetings are depicted with a diamond, timed meetings in the morning will have a block indicator near the top of the box, and later meetings will have a block indicator near the bottom of the box.
- **Clocks:** Shows two clocks for each day with a dated meeting or task. The first clock represents the morning and the second clock represents the afternoon. Darkened segments of the clocks indicate scheduled meetings.
- **Icons:** Shows icons on the days that have meetings or To Dos with associated icons. Agendus can display up to three icons on each day.
- **Expanded:** Similar to icon mode, but this view shows details for a selected day: tap on a day to select it. This mode also has color-coded gauges along the right edges of the day boxes indicating the amount of committed time for that day: the gauge goes from a short green bar to a medium yellow bar to a long red bar.

To select one of the Month views:

1. Tap on the **31** button in the toolbar to switch to the last-used month view.
2. Tap on the **^31** button again to pop up the list of modes.
3. Tap on the mode you want to view.



Standard, Clocks, and Icons modes: Tap on a day to see the agenda view for that day, tap and hold on a day to set a color for the day

Expanded mode: Tap on a day to pop-up details for the day

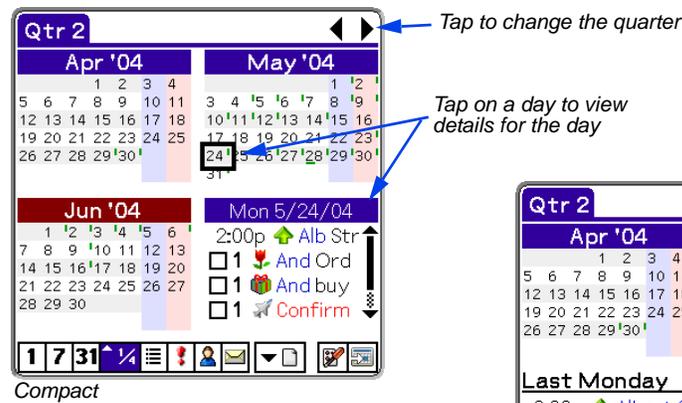
Quarter Views: Compact and Expanded

Agendus Standard Edition supports one Quarter view, and the Professional Edition supports two modes for the Quarter view:

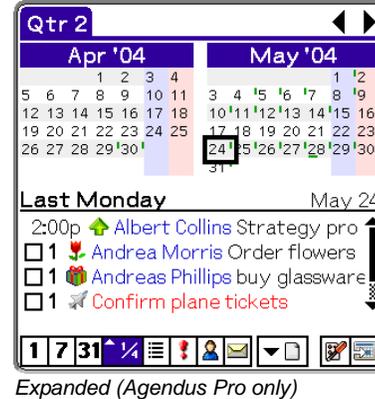
- **Compact:** Shows several months at a glance (three on standard displays and five on displays that support portrait or landscape mode). The space for another month is used to show details for the selected day: tap on a day to select it.
- **Expanded:** Similar to the compact view, but the selected day's details run the whole width of the screen. The expanded mode is only available with Agendus Pro.

To select one of the quarter views:

1. Tap on the  button in the toolbar to switch to the last-used quarter view.
2. Tap on the  button again to pop up the list of modes (Agendus Pro only).
3. Tap on the mode you want to view.



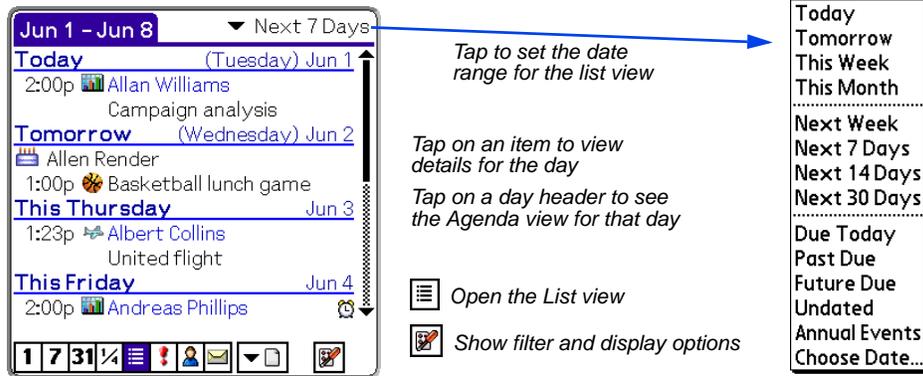
-  Change modes (Agendus Pro only)
-  Go to current day and quarter
-  Show filter and display options



List View

The List view will show meetings, calls and To Dos for a selected date range.

1. Tap on the  button in the toolbar to switch to the list view.
2. In the upper-right corner of the view, tap to select one of the preset date ranges or select **Choose Date** to select your own range.



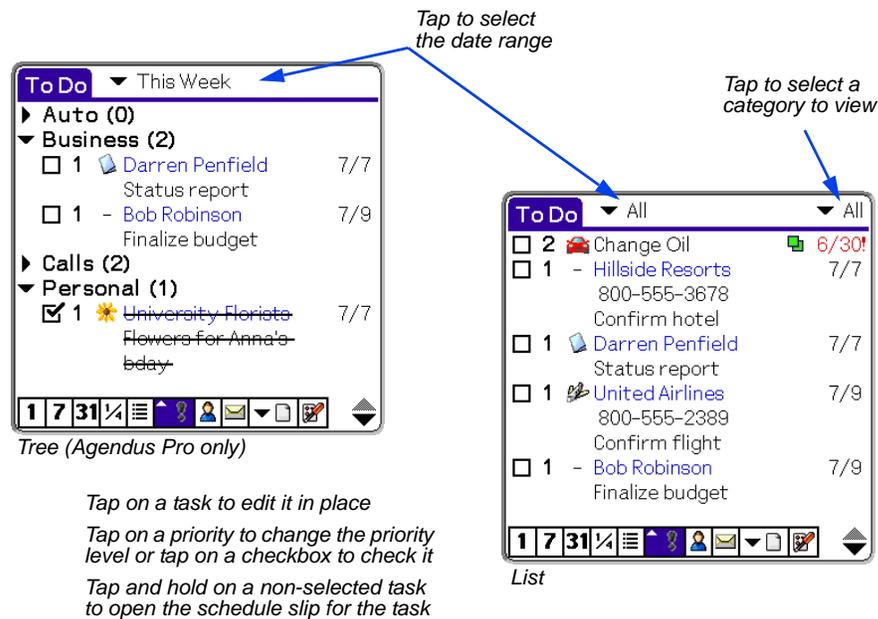
To Do Views: List and Tree

The To Do view shows only your To Dos and calls. In the To Do views you can edit the tasks in the view, without opening the task schedule slip. (For high-resolution devices, this edit-in-place feature will not be available if you change the font to one of the high-resolution fonts.) Agendus Standard Edition supports one To Do view, and the Professional Edition supports two modes for the To Do view:

- **List:** Lists all To Dos and calls in the selected time period. The order the tasks are listed depends on the sort order set in the To Do preferences (page 58).
- **Tree:** The tree mode groups your To Dos and calls by category. Tap on a category name to view or hide the To Dos from that category. The tree mode is only available with Agendus Pro.

To select one of the quarter views:

1. Tap on the  button in the toolbar to switch to the last-used To Do view.
2. Tap on the  button again to pop up the list of modes (Agendus Pro only).
3. Tap on the mode you want to view.



Tap to select the date range

Tap to select a category to view

Tap on a task to edit it in place
Tap on a priority to change the priority level or tap on a checkbox to check it
Tap and hold on a non-selected task to open the schedule slip for the task

 *Change modes (Agendus Pro only)*

 *Show filter and display options*

Contact Views: Compact, Expanded, and Photo

The Contact view shares the same database as the native address book in your Palm device: contacts entered in your address book will appear in Agendus and contacts entered in Agendus will appear in your address book.

Note: Pictures assigned in Agendus will not appear on the Palm desktop or in the native Palm address book. Birthdays will only appear in the date book of compatible devices, such as the Tungsten T3 or Tungsten E.

Agendus supports three modes for the Contact view:

- **Compact:** Lists one contact per line, and one other field (number, company, city, etc.) per contact. If you choose to display a number, you can see or select other numbers for a contact by tapping on the displayed number.
- **Expanded:** Displays all of the contact numbers for each contact.
- **Photo:** Displays assigned photos and two contact numbers for each contact.

To select one of the contact views:

1. Tap on the  button in the toolbar to switch to the last-used contact view.
2. Tap on the  button again to pop up the list of modes.
3. Tap on the mode you want to view.

Compact

Name	Number
Albert Collins	454-555-7398
Allan Williams	342-555-6540
Allen Render	765-555-6421
Andreas Phillips	454-555-4533
Aneta Kaplan	324-555-3242
Anna Mitchum	322-555-5871
Bob Robinson	321-555-9214
Charles Collins	543-555-9217
Chris Roberts	342-555-4656

Photo

Albert Collins
45
65

Allan Williams
34
43

Allen Render
76

Expanded

Albert Collins
454-555-7398
654-555-4928
654-555-2197
albert@cisco.com

Allan Williams
342-555-6540
432-555-8248
allan@yahoo.com

Select which field to list

Tap to pop up the full list of the contact's numbers

Choose a category

Change modes

Group the contact list (by company, state, etc.)

Sort the list in a different order (last name, company, etc.)

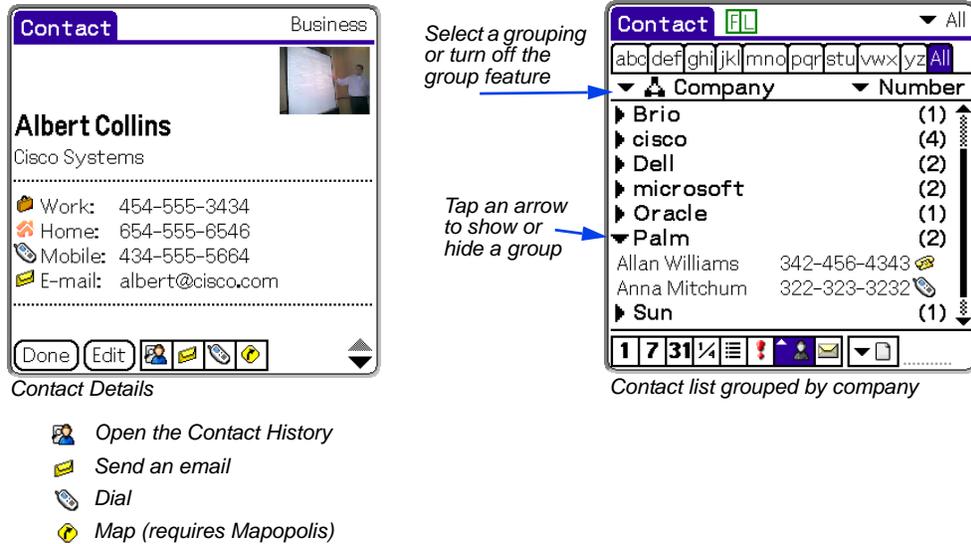
Tap on a name to see the contact details

Tap and hold a contact name to pop up a list of actions, including contact history

Tap here and start typing or writing a name to scroll to that name (all modes)

4. To view a contact's full details, tap on the contact's name.

Tip: If you have Mapopolis installed, then when you tap and hold on a contact name, you will have the option to map the contact's address.



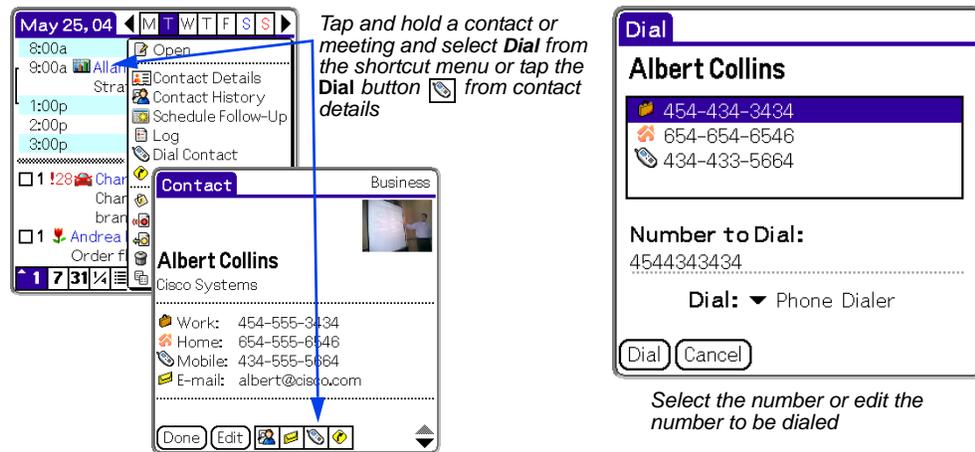
Lookup Functionality with the Directional Pad

While in the contact view you can use the directional pad (DPad) to quickly find a particular contact. Press the DPad to the right to bring up the DPad lookup tool, then up or down to scroll through the letters. After finding a letter, press right again to enter a second letter. Repeat this until you find the name you are looking for, then press DPad select to highlight the name in the list, and press it again to open the contact details.

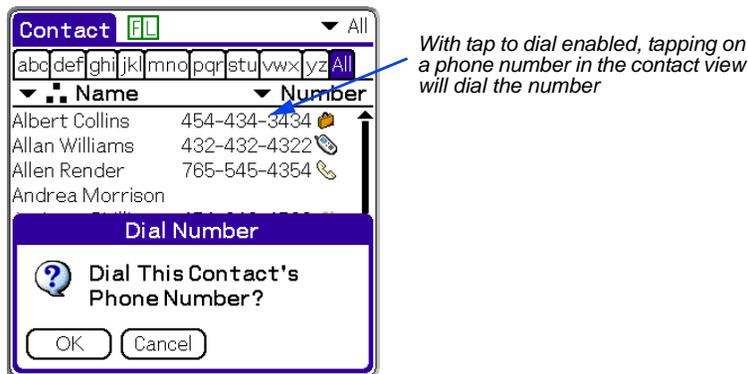
Dialing

Dialing in Agendus requires a Treo, VisorPhone, Kyocera smartphone, Palm OS 4.1 device or Palm OS 4.0 or earlier with phone services. To dial via IR or Bluetooth a compatible mobile phone is also needed. Phone services are part of Mobile Internet Kit.

In Agendus you can tap and hold on a contact or meeting to open a shortcut menu with an option to dial the contact. From within a contact details screen, you can click the dial button  to open the dialer.



You can also enable one-tap dialing, where tapping on a phone number in the contact list will open the dialer. Enable tap-to-dial by going to **Menu | Options | Preferences | Contact View**.

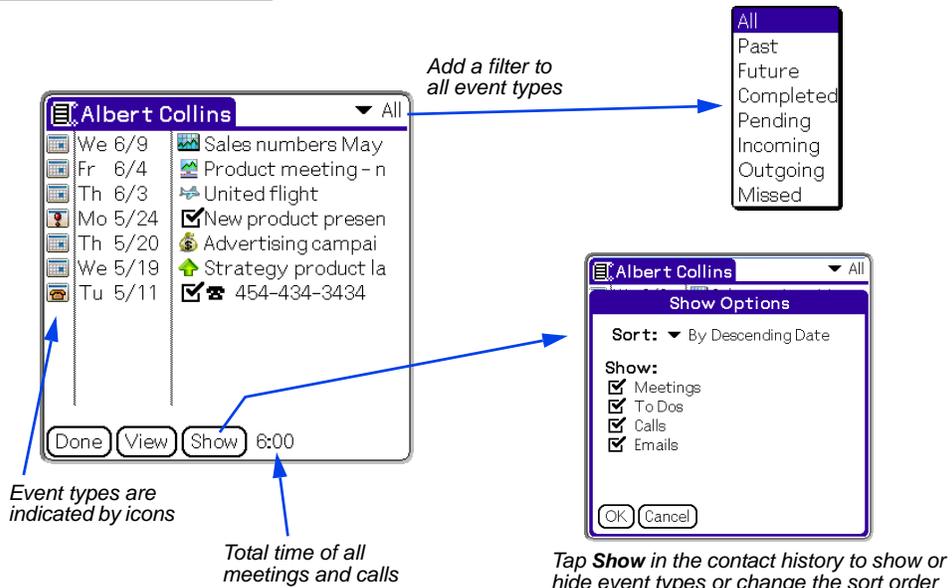


Contact History

Contact history is built from the calls, To Dos, and meetings where this person is designated as the primary contact in the details page of the schedule slip (for repeating meetings only the first instance of the meeting will be shown). If you are using AgendusMail, the history will also include email messages to this contact; if you are using a smartphone with a compatible call log, such as a Treo or Visorphone, then calls will also be included.

Note: If you have installed iambic's SalesWarrior, then opportunities with this contact will also be listed. SalesWarrior, sold separately, helps you track sales prospects and opportunities. Please visit www.iambic.com/saleswarrior for more information.

To access a contact history, tap and hold on a contact name in most Agendus views to pop up a shortcut menu, and then select **Contact History**. If you are in the Contact Details screen, you can tap the **Contact History** button .



Note: Show Emails only appears if the contact has an email address & iambic Mail is installed

Show Mobile Phone Calls will be available if your are using a Treo or Visorphone

Exporting the Contact History

You can export a contact history as a text file that can be imported into a spreadsheet or other program.

1. Open the contact history you want to export.
2. Select **Menu | Options | Export** to open the export screen.



3. Set the file type to memo pad.
4. Enter a title for the memo.
5. Select a format for the memo.

Tip: Comma delimited format inserts commas between the fields in the export file, and is commonly used for moving data into database applications. The tab-delimited format will insert a tab between the fields and is a more common format for spreadsheets.

6. Tap **Export**.
7. See the documentation for your destination program for information on importing the file.

Note: Depending on where you are going to use the data, you may need to hotsync your device, and copy and paste the memo into a text file on your desktop computer.

WORKING WITH AGENDUS

Creating New Meetings and Annual Events

Meetings, Events, To Dos, and Calls are all created through Agendus using the schedule slip. The type of record you create will affect some of the options in the schedule slip.

Meetings are typically date-specific appointments to get together or do a certain thing on a particular day. Although meetings usually have an associated start time and duration, they can also be set with no time; birthdays and holidays are examples of meetings with no set time.

1. Click the **New** button  and select one of the following from the pop-up menu:
 - Select **Meeting** from the pop-up to open a meeting schedule slip.
 - Select **Annual Event** to create a meeting that repeats yearly.
 - Select **Weekly Meeting** to create a meeting that repeats every week.
 - Select **Meeting from Template** if you previously saved a meeting as a template and want to base the new meeting on that template (see page 45.)

Other meetings show up in blue so you can prevent scheduling conflicts

Assign a primary contact

Sort the contact list

View the details for the primary contact

Use the tabs to edit different attributes of the meeting

- Attach a note
- Delete the meeting
- Set an alarm
- Dial the primary contact

2. Enter the date, time, primary contact, meeting description, and other attributes into the schedule slip. (See “Editing Meetings” on page 34.)

Tip: If you have not started writing in the name for the primary contact, the contact list menu  will show recently used contact names. As you start writing or typing a name onto the contact line, Agendus will try to fill in the correct name. Opening the contact list at this point will show all names that match the letters you have entered so far.

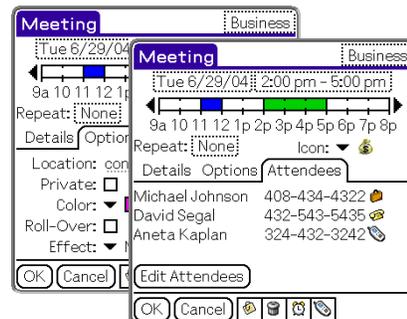
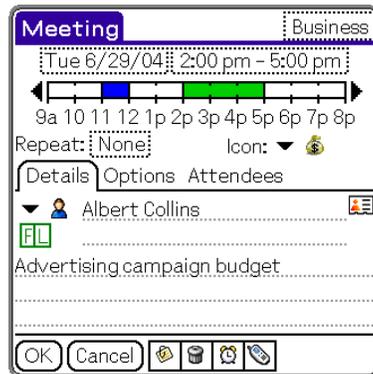
3. If this meeting is similar to other meetings you will need to add, you can save it as a template. Select **Menu | Options | Save As Template**. Enter a name for the template and tap **OK**. (See “Using Templates” on page 45.)
4. Once you have entered all the information for the meeting, including setting any alarms  or adding a note , tap **OK** in the schedule slip to save the meeting and return to the previous view.

Editing Meetings

Add or edit meetings using the Agendus meeting schedule slip. The schedule slip for meetings is similar to the schedule slip for To Dos and Calls, but has some differences specific to meetings.

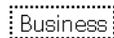
In the meeting schedule slip, there are three tabbed pages: details, options, and attendees. Tap a tab to switch between the pages. The general areas above and below the pages do not change.

Meeting Schedule Slip Settings - General Settings



The general settings stay the same in every tab of the schedule slip

Category

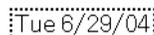


Tap on the category box in the upper-right corner of the screen to select a category for the meeting. You will also be able to edit categories and add new ones.

You can use categories as a filter, so that only records in a specific category are displayed (page 66), or have Agendus automatically assign colors or icons based on categories (page 65).

Categories for meetings, To Dos, and contacts are all independent.

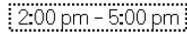
Date



Tap on the date box to open the date picker.

Meeting Schedule Slip Settings - General Settings

Time Tap on the time box to open the time picker. In the time picker you can also specify “no time” or “all day.”



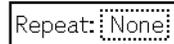
You can also set the time and duration using the time bar.

Time Bar The time bar graphically displays the time and duration of the meeting using a green bar. Other meetings for the day are displayed in blue.

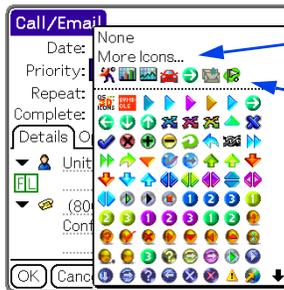
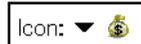


Tap and drag on the green bar to move the meeting time. Tap and drag on the time bar outside of the green bar to set a new time and duration.

Repeat Tap the repeat box to set up a recurring meeting. Meetings can repeat every set number of days, weeks, months, or years, through a specified end date. For example, you could have the meeting repeat every friday or on the third Tuesday of every month.



Icon Tap the icon box to select from installed icons.



Icons are used in several of the Agendus views to help you visually identify records.

Icons can be automatically assigned by category (page 65) or using the Vivid Agenda feature (page 52).

Note Open a page where you can write a memo attached to this meeting. In the calendar views, meetings with notes will appear with a note icon: tap the note icon to view or edit the note.



Delete Meeting Delete the current meeting.

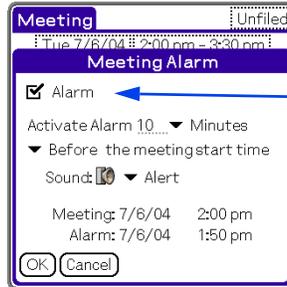


Meeting Schedule Slip Settings - General Settings

Set Alarm



Enable or disable a meeting alarm, set the amount of time before the meeting starts to sound the alarm, and set the sound effect for the alarm.



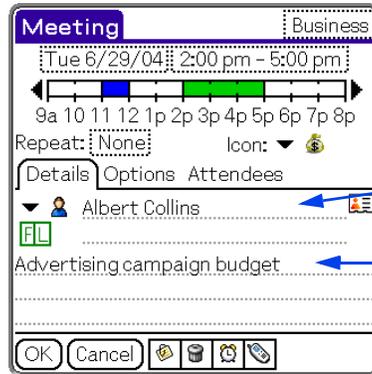
Enable the alarm to view the alarm settings

Dial



Call the primary contact. (requires Smartphone or Bluetooth connection to phone or tone dialer application).

Meeting Schedule Slip Settings - Details



The first two lines are for the contact name

Write or type a description for the meeting

Primary Contact On the first line of the details page, enter a primary contact. As you start writing or typing letters, Agendus will try to match your entry with your contact list. Keep entering letters until the correct contact is displayed, or tap the contact **Quick List** button to view matching entries.

For new contacts, finish entering the name and then tap the **Contact Details** button: you will be prompted to add the new name to your contact list.

Long contact names will wrap to the second line.

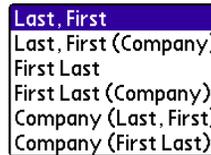
Enter other contacts for the meeting on the **Attendees** page.

Quick List As you enter letters into the Primary Contact line, Agendus will filter this list to show only matching contacts.



If you have not entered any letters, only recently selected contacts will be displayed in this list.

Sort Change how contact names are listed (first name, last name, company name) by tapping the **Sort** button.

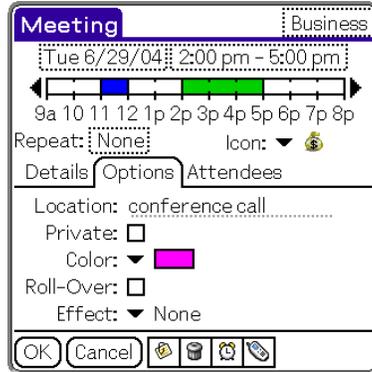


Contact Details Once you have entered a primary contact, click the **Contact Details** button to view the details for the primary contact. If Agendus does not recognize the contact name, you will be prompted to add the name to your contact list.



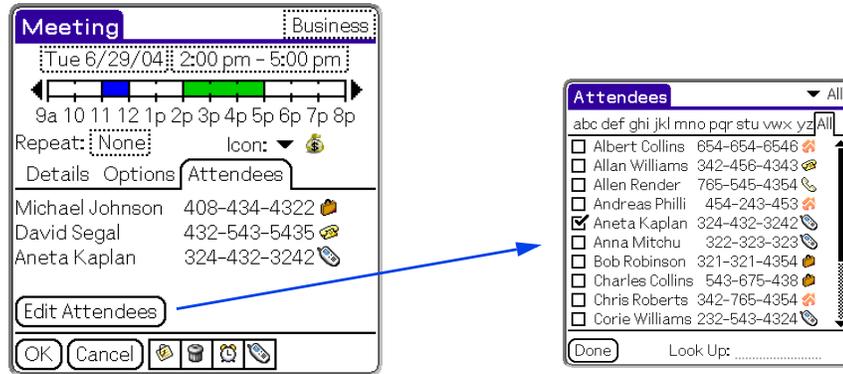
Description On the third line and below, enter a description of the meeting.

Meeting Schedule Slip Settings - Options



Location	Enter a location for the meeting.
Private	Private meetings can be masked or hidden from the Agendus views using the security settings in your palm device.
Color	Apply a text color to the meeting description.
Roll-Over (Agendus Pro)	<p>Set a meeting to “roll over” to have Agendus automatically keep rescheduling a meeting for the same time on the next day. This allows the meeting to stay on the calendar in case it gets postponed. When the meeting occurs, open the meeting’s schedule slip and turn off this option.</p> <p>When this option is enabled, you can set to have the roll over continue indefinitely or set an end date.</p> <p>This option is only available for Agendus Pro.</p>
Effects (Agendus Pro)	<p>Apply effects to the text of the meeting. You can apply an underline, strike through, or double strikethrough. This effect will apply to the primary contact and meeting description in the calendar views.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <ul style="list-style-type: none"> ◆ No Effect ◆ <u>Underline</u> ◆ Strike through ◆ Double Strike through </div> <p>This option is only available for Agendus Pro.</p>

Meeting Schedule Slip Settings - Attendees



**Edit Attendees
(Agendus Pro)**

Tap the **Edit Attendees** button to view a contact list with check boxes next to the contact names. Checked contacts will appear in the Attendees list. Start typing or writing a name in the Look Up area to quickly find that name.

Note: The attendees list is stored in a hidden area of the meeting note. If you look at the meeting in the native Palm Date Book, you will see an attached note. You will not see a note in Agendus unless you add a note to the meeting.

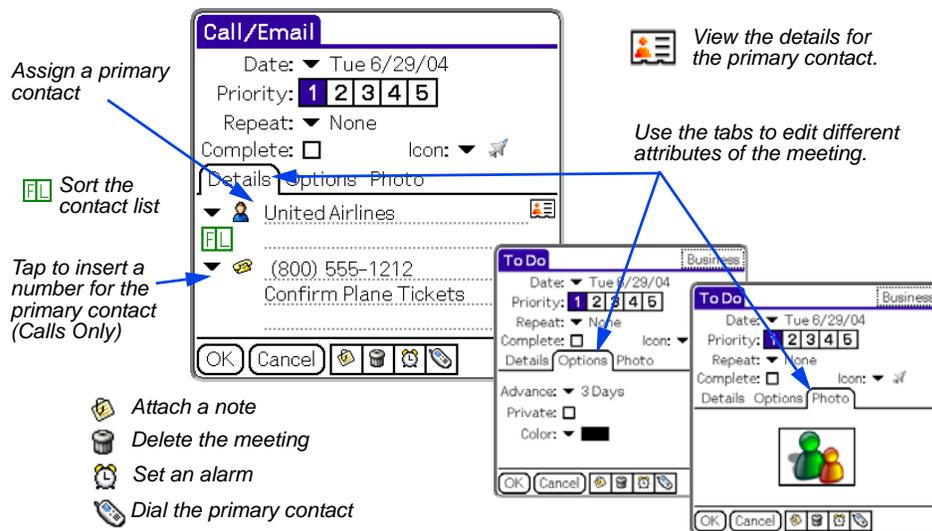
This option is only available for Agendus Pro.

Creating New To Dos and Calls

To Dos and calls are tasks that need to get done. They may have deadlines or dates you want to see them completed, but they usually don't need to be done at a specific time. Calls are a special category of To Do, so you can't assign a category to a call.

Creating new To Dos and Calls is very similar to creating a new meeting. They just use a slightly different version of the schedule slip.

1. Click the **New** button  and select one of the following from the pop-up menu to open the task schedule slip:
 - Select **Call** to create a task to call or email someone.
 - Select **To Do** to create a new task.
 - Select **Call from Template** to create a new call based on a call template you have previously saved.
 - Select **To Do from Template** to create a new task based on a call template you have previously saved.



2. Enter the date, time, primary contact, task description, and other attributes into the schedule slip. (See “Editing To Dos and Calls” on page 41.)

Tip: If you have not started writing in the name for the primary contact, the contact list menu  will show recently used contact names. As you start writing or typing a name onto the contact line, Agendus will try to fill in the correct name. Opening the contact list at this point will show all names that match the letters you have entered so far.

3. If this task is similar to other tasks you want to enter, you can save it as a template. Select **Menu | Options | Save As Template**. Enter a name for the template and tap **OK**. (See “Using Templates” on page 45.)
4. After entering the information for the meeting, including setting any alarms  or adding a note , tap **OK** in the schedule slip to save the task.

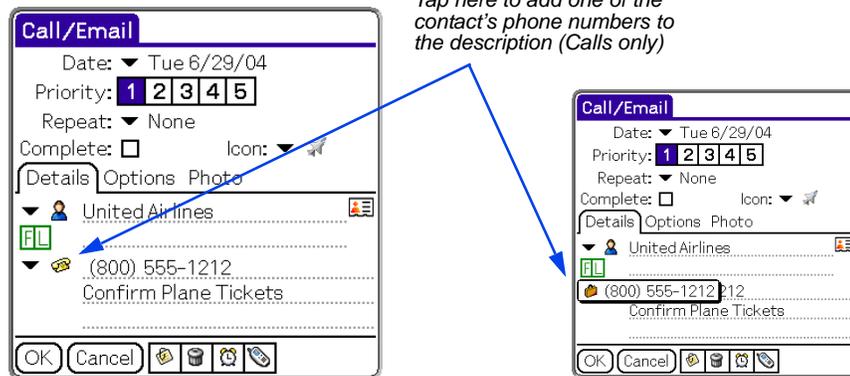
Editing To Dos and Calls

Add or edit To Dos and calls using the Agendus task schedule slip. The schedule slip for tasks is similar to the schedule slip for meetings.

To view the schedule slip for a saved task from one of the To Do views, tap on another task, then tap and hold on the task and then tap **Open** from the menu that pops up.

In the task schedule slip, there are three tabbed pages: details, options, and photo. Tap a tab to switch between the pages. The general areas above and below the pages do not change.

Task Schedule Slip - General



<p>Category (To Dos only)</p>	<p>Same as the Meeting Schedule Slip (page 34).</p> <p>Category lists for meetings, To Dos, and contacts are all independent.</p> <p>To set a default category for new To Dos, see page 57.</p>
<p>Date</p> <p>Tue 6/29/04</p>	<p>Tap on the date box to open the date picker and assign a due date.</p> <p>Agendus can assign a default due date or change this to the completion date when you mark off a task as completed (page 57).</p>
<p>Priority</p> <p>1 2 3 4 5</p>	<p>Tap to set a priority for the task.</p> <p>Agendus can filter tasks by priority (page 66).</p> <p>You can set a default priority for new To Dos (page 57).</p>

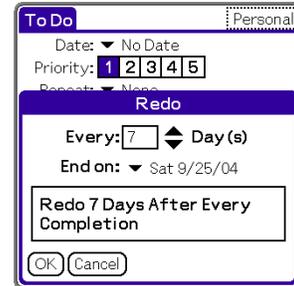
Task Schedule Slip - General

Repeat

Tap the repeat box to set up a task as either a repeat or a redo.

Repeat: Tasks can repeat every set number of days, weeks, months, or years, through a specified end date. For example, you could have the task repeat on the 15th of every month or on the same date every year.

Redo: Set a task as a redo if you only want it to repeat after it has been completed. For example, you may want to set a task for oil changes to “redo” every 90 days.



Complete

Check this box if the task is complete.

Completed tasks will be displayed with a strikethrough (~~strikethrough~~) to indicate they are completed.

Set Agendus to display or hide completed To Dos and calls through the To Do Settings preferences (page 58).

Set Alarm



Set a day and time for the alarm and set the sound effect for the alarm.



- Icon
- Note
- Delete Task
- Dial

Same as the Meeting Schedule Slip (page 34).

Task Schedule Slip - Details

Tap the phone icon to insert a contact's phone numbers into the description

Primary Contact Quick List Sort Contact Details Same as on the Details page of the Meeting Schedule Slip (page 37).

Phone Numbers (Calls Only) and Description On the third line and below you can enter a description of the task. If you are creating or editing a call, you can click the **Phone Number** button to select and insert a contact number for the selected contact into the description area.

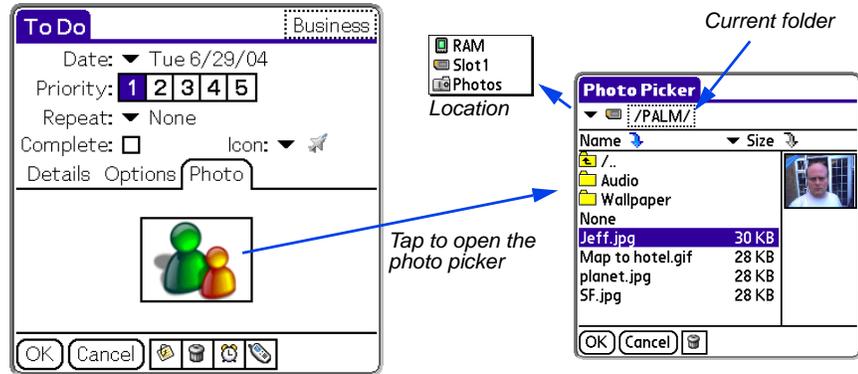


Task Schedule Slip - Options

Advance Set how many days prior to the task date you want the task to appear in the Agenda (one-day) views. To set a default advance period for new To Dos, see page 57.

Private Color Same as the Meeting slip (page 38).

Task Schedule Slip - Photo



Photo

Tap on the image on the photo page to open the photo picker, where you can select any GIF or JPEG picture stored on your device's memory card.

In the photo picker, you can browse through locations and folders on your device.

Location: Images may be stored in RAM, on a memory expansion card (such as a memory stick), or in Photos. The Photos location is only available on newer palmOne devices, such as the Zire 72, or on the Tungsten T3 and Tungsten E if you have installed the palmOne Photo-Library files (see page 11).

Folder: Once you have selected the location, you will see the folders stored in that location. Tap on a folder to open it. Tap on the folder to view the parent folder.

Name: Tap on next to name to sort the files by name. Tap again to reverse the order.

Attribute: You can view the file size, dimension in pixels, or date of files by tapping on the attribute list. Tap on next to the attribute to sort the list.

Tap on a displayed file name to preview it, and tap **OK** to add it to the task information. Tap on **None** in the file list if you want to unassign a photo from a task.

To view photos, you must be in one of the To Do views, and the Show Photos option must be selected (page 66).

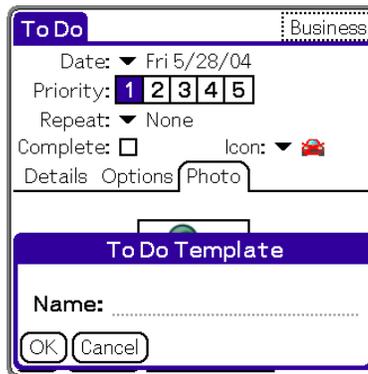
Note: Assigning photos requires a device with Palm OS 5.0 or later.

Using Templates

Using templates is an easy way to quickly create a new meeting, To Do, or call that is similar to others you have created.

To create a template:

1. Open an item that you would like to use as a template, or create a new one and set the attributes you would like to save in the template.
2. Tap the **Menu** button  and select **Options | Save as Template** to open the Template name box.



3. Enter a name for the template and tap **OK**.
4. Tap **OK** or **Cancel** to save or exit the meeting you had opened.

To Create a New Record from a Template

1. Tap on the **New** button  and select to create a new meeting, call, or To Do from a template to open the Choose Template list.



2. Select the template name from the list and tap **OK**.
3. All of the attributes from the template will be copied into a new record except for the original's date.

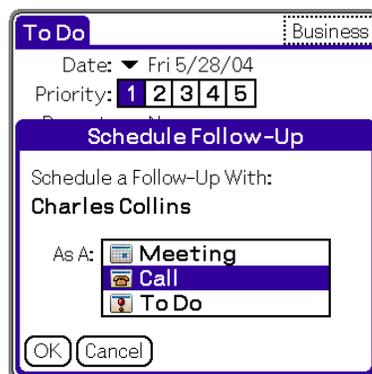
To Delete a Template

1. Tap on the **New** button  and select to create a new meeting, call, or To Do from a template to open the Choose Template list.
2. Select the template name from the list.
3. Tap the **Delete** button  and tap **OK** to delete the template and return to the template list.
4. Tap **Cancel** to close the template list.

Scheduling Follow-Ups

Quickly schedule a follow up to any meeting, call, or To Do. Follow-ups can be any of these types, regardless of the original type.

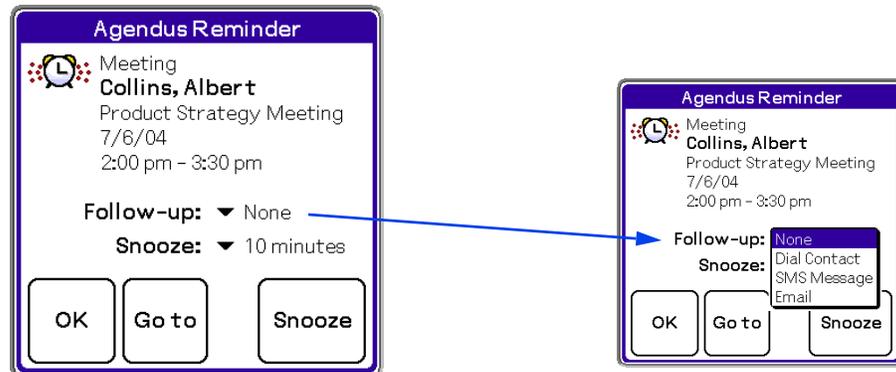
1. Open the item, tap the **Menu** button  and from the menu select **Menu | Options | Schedule Follow Up** or, in most calendar views, tap and hold on the item and select **Schedule Follow Up** from the shortcut menu.



2. In the Schedule Follow-Up box, select to schedule the follow-up as a meeting, Call, or To Do and tap **OK**. This will open up a new schedule slip for the selected type with the primary contact and a description already entered.
3. Finish filling out the schedule slip and tap **OK**.

Following Up from an Alarm

If you have set an alarm for a meeting, To Do, or call, Agendus will open a reminder when the alarm goes off.



- To turn off the alarm, tap **OK**.
- To open the schedule slip for the meeting or task, tap **Go to**.
- To have the alarm remind you again, set a snooze time and tap **Snooze**.
- To dial the primary contact, or to send an email or SMS message to the primary contact, tap **Follow-up** and select your desired action.

Note: These follow-up options are only available in Agendus Pro and will only be available if they are supported by your Palm device and if you have set their communication settings in Agendus preferences (see page 60).

Creating a Log Entry for a To Do, Call, or Meeting

You can create a log of meetings, To Dos, and calls with your contacts. Log entries are stored in the notes for the primary contacts of the items.

To log an item, open the meeting, call, or To Do and select **Menu | Record | Log Item**, or tap and hold on the item and select **Log** from the shortcut menu.

To view the log, go to one of the contact views and tap on the note icon  for the contact, or open the contact details, tap **Edit**, and tap on the note button .

Converting To Dos, Calls, and Meetings

It is easy to change the type of a meeting or task, although you will lose any information that is not supported in the new type. For example, if you change a meeting to a To Do, you will keep the date and primary contact, but lose the time and attendee list, since those items aren't supported by To Dos.

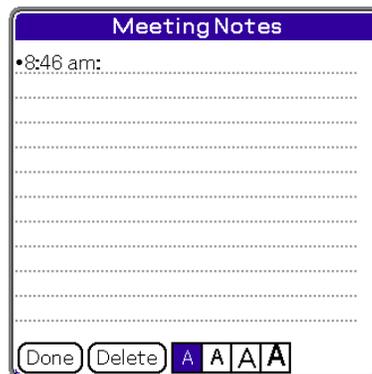
1. Open the schedule slip for the meeting or task (from most calendar views, tap on the item to open it).
2. Tap the **Menu** button  and select **Options | Convert To (Meeting, Call, or To Do)** to open the Convert confirmation box.
3. Tap **OK** to complete the conversion.

Creating New Journal Entries

Journal entries are simply notes to yourself. Journal entries appear in all of the different calendar views as “Daily Journal,” and can be very handy for creating notes or memos on the fly, without having to reference or attach it to a specific contact.

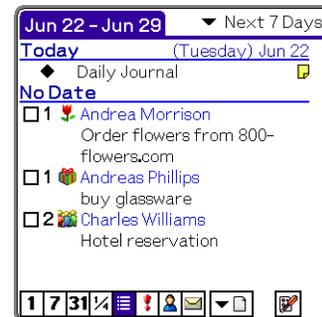
Journal entries are saved as meetings without contact information. Agendus automatically selects the current day as the date for the journal entry.

1. Click the **New**  button and select **Journal Entry** from the pop-up menu. This will open a meeting note with the current time already inserted.



Tap **Done** to close and save the entry

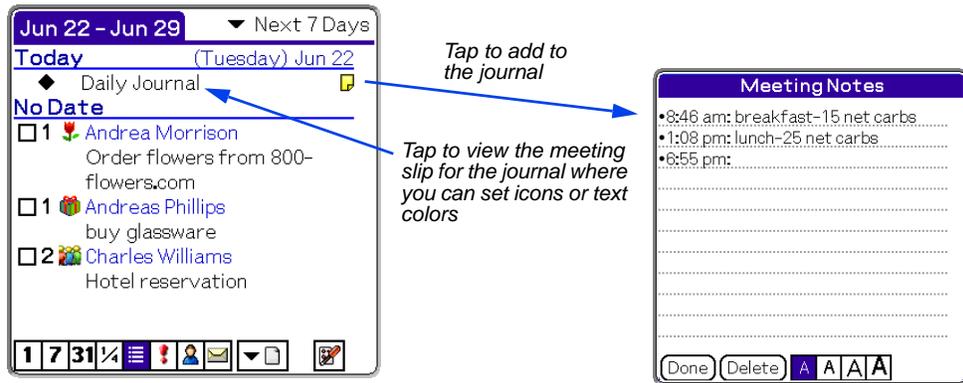
Journal entries for the same day are stored in the same Daily Journal



2. Start writing or typing to enter your journal entry.
3. Once you have finished entering your note, tap **Done** to return to your previous view.
4. If you want to add an icon, category, or text color for the journal, open the schedule slip for the journal by tapping on the **Daily Journal** item in one of the calendar views. (See “Editing Journal Entries,” below.)
5. If you add another journal entry later the same day, it will open the same meeting note with the time inserted on a new line.

Editing Journal Entries

Agendus saves journal entries as a special type of meeting with no contact information. Data captured in the Daily Journal is actually stored in the notes attached to these meetings. To add to the Daily Journal, just tap the Daily Journal's **Note** icon . To open up the meeting commitment itself, tap the Daily Journal field.



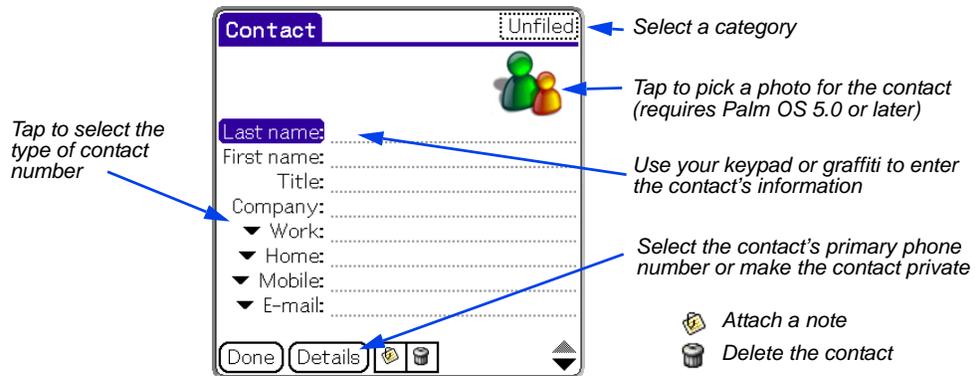
Note: You can change the Daily Journal to a meeting by tapping the Daily Journal item and filling in the meeting fields (contact name, etc.).

Tip: Daily Journal entries will be synchronized to the Palm Desktop. To edit or change journal entries on the Palm Desktop, open the Palm Desktop and double-click on the **Daily Journal** entry. Next, click the **Edit** button to open the entry and in the Edit Event dialog box click the **Note Editor** icon. Edit the entry and then click **OK**. Any changes made on the desktop will be synchronized to Agendus on the Palm device.

Creating a New Contact

Agendus integrates directly with your native Palm Address book. You can open a blank contact and enter data within Agendus. You can also view your entire Address book within Agendus.

1. Click the **New** button  and select **Contact** from the pop-up menu to open a blank Contact entry.



2. Enter the details for the contact.

To insert a photo for this contact, tap on the photo icon in the upper right corner of the screen (requires Palm OS 5.0 or later). For more information on the photo picker, see page 44.

If you are entering your own information, you can make this entry your electronic business card for easier beaming of your information to other Palm devices; to make this entry your business card, select **Menu | Record | Select Business Card**.

Note: If you use the contact's birthday field, then the contact's birthday will show up in the calendar views. (In the calendar views, use the **Show Options** button  to enable or disable this feature.)

3. Click **Done** to return to the contact views.

Note: The contact's photo will not appear with the contact information when using the Palm Address Book or Palm desktop; the birthday will appear in the Date Book of compatible Palm devices.

Editing Contacts

From the contact details screen, you can add a note to a contact or delete the contact by tapping the **Menu** button.

To edit the contact's information or add a picture, open the contact details and then tap the **Edit** button.

Creating New Emails (Agendus Pro Only)

Agendus Pro integrates directly with almost any email client you have installed on your Palm device, such as AgendusMail, VersaMail, or SnapperMail. (An email client is the application you use for organizing, reading, and writing emails.) If you do not have an email client, AgendusMail is available as a free download for registered owners of Agendus Pro at www.iambic.com/email/palmos.

To assign an email client, go to **Menu | Options | Preferences | Miscellaneous**. (See page 60.)

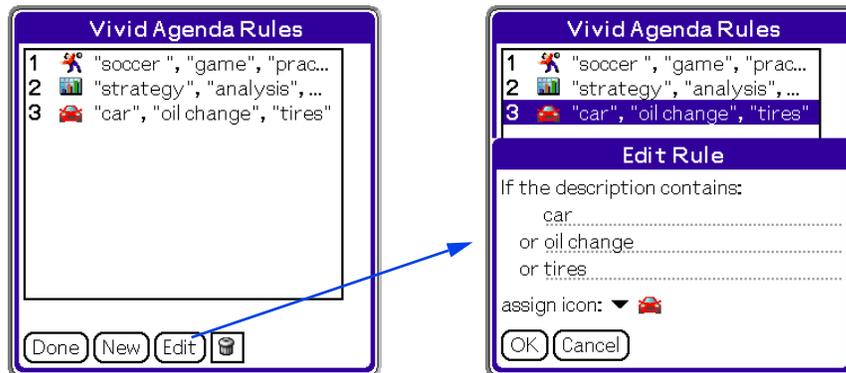
Once you have assigned your email client, you can write a new email by tapping the **New** button  and selecting **Message** from the pop-up menu to open a new email.

Please see the documentation for your email client for information on writing, sending, receiving, organizing, or syncing your email messages.

Using Vivid Agenda to Assign Icons

Use Vivid Agenda to assign icons to new meetings and tasks based on keywords used in their descriptions.

1. From one of the views, select **Menu | Options | Vivid Agenda** to open up the Vivid Agenda Rules.



2. To create a new set of rules, tap **New** to open the Edit Rule screen; to edit an existing rule in the list, tap on the rule and then tap **Edit**.
3. Enter the keywords you want to use.
4. Tap **Assign Icon** and select an icon from the pop-up list.
5. Tap **OK**.

Changing the Order of Vivid Agenda Rules

You can change the order that rules are listed. If two or more rules use some of the same keywords, Vivid Agenda will use the rule that is higher in the list.

1. If you are not already in Vivid Agenda, select **Menu | Options | Vivid Agenda**.
2. Tap on the rule you would like to move.



3. Tap the up or down **Move** arrows to change its position.
4. Tap **Done**.

Improving Agendus Performance

As you add more and more meetings, tasks, and contacts, you may notice Agendus start to slow down. If this happens, there are two options which will help speed up Agendus: changing the sort order and purging old appointments.

Changing the sort order allows Agendus to keep the native Palm databases in the optimal order for use with Agendus, so Agendus will be able to pull up your data faster. Although this data will still be available in other applications on your Palm, it may not look like it usually does. You can change the sort order for tasks (To Dos and calls) or contacts.

Purging old meetings and tasks deletes them from the Palm database, so there is less information for Agendus to organize. You can elect to save this information in an archive in the Palm Desktop. For more on purging data, see below.

To improve Agendus performance, select **Menu | Options | Performance**.



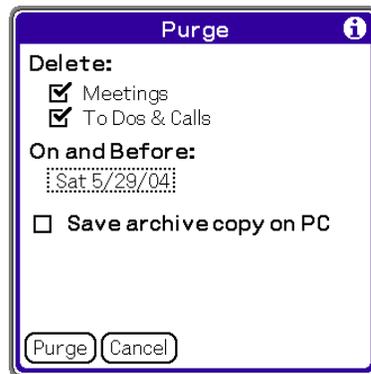
Purge

The purge function lets you do some housekeeping by deleting data you no longer need. When you purge from Agendus application you can choose to delete old meetings or completed tasks.

Note: You can elect to archive purged data to the Palm Desktop.

The Purge function available in Agendus is equivalent to selecting purge in the Palm Date Book to delete meetings/appointments older than a certain date and then opening the To Do list and selecting purge to delete completed To Dos.

To purge old data from your Palm databases, select **Menu | Options | Purge**, or tap the **Purge Completed To Dos** button in the Performance window.



The purge function does not distinguish between commitments scheduled in Agendus and those scheduled using the Palm device's built-in applications. Purging from either Agendus or the individual date and To Do applications will delete the same data.

Important: There is no undo for a purge.

Beaming

You can beam contacts, calls, To Dos, meetings, and selected views from Agendus. The receiving device does not need to have Agendus installed.

Open the item you wish to beam, and select **Menu | Record | Beam**.

After beaming, the person who receives a call or To Do will first see it in the native Palm device To Do list. A beamed Agendus meeting will first appear in the native Palm device Date Book. Beamed addresses will appear in the Palm Address Book. If the receiving device also has Agendus installed, then just switch the device to Agendus and the beamed information will be there.

If you select to beam a view, then all of the individual meetings, calls, and To Dos in the view will be beamed.

If you select to beam the business card, then the contact information designated as a business card will be beamed. (See "Creating a New Contact" on page 50.)

Note: If you have pictures associated with a call, To Do, or contact, the photo will not be included when you beam.

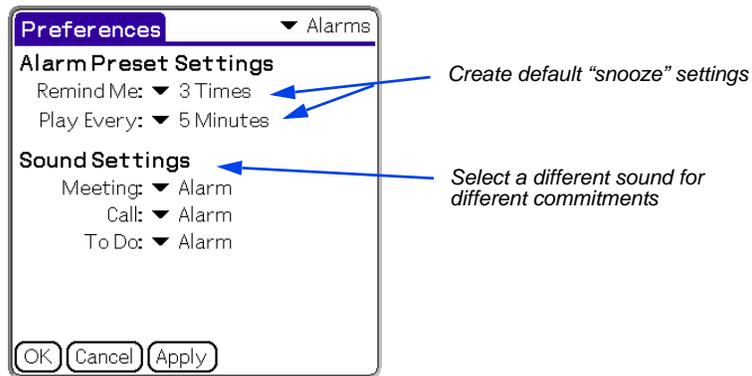
Note: Icons will beam with their commitments only if both the person beaming and the person receiving have the same icon data sets. For example, if both persons install the Agendus icon data file, then any commitments created with any of these icons will be beamed along with the item.

SETTING AGENDUS PREFERENCES

Alarm Preferences

Use alarm preferences to create “snooze” settings for your alarms: set how many times the alarm should sound for each meeting or task and set the time between each alarm. You can also select which alarm sounds to use.

Select **Menu | Options | Preferences | Alarms**.

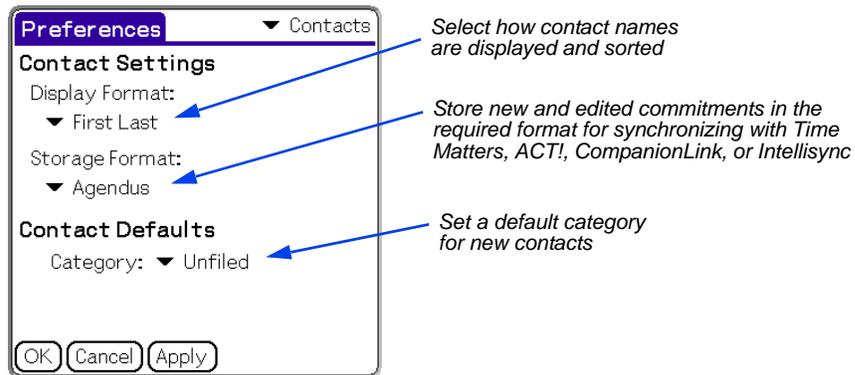


Contact Preferences

Contact preferences in Agendus include setting the display and sort order of your contact list (by first name, last name, or company name) and setting a default category for new contacts.

If you are using third-party software, such as Time Matters, ACT!, CompanionLink, or Intellisync, this is also where you set the storage format of your Agendus data so that when you edit records or create new records, the data will sync with your desktop software.

Select **Menu | Options | Preferences | Contacts**.



How Storage Formats Affect Displays

Selecting a specific Storage Format also determines how To Dos, calls and meetings created in Agendus will appear in the native Palm To Do and Datebook applications (for example, it will determine whether the contact name will appear in brackets or not).

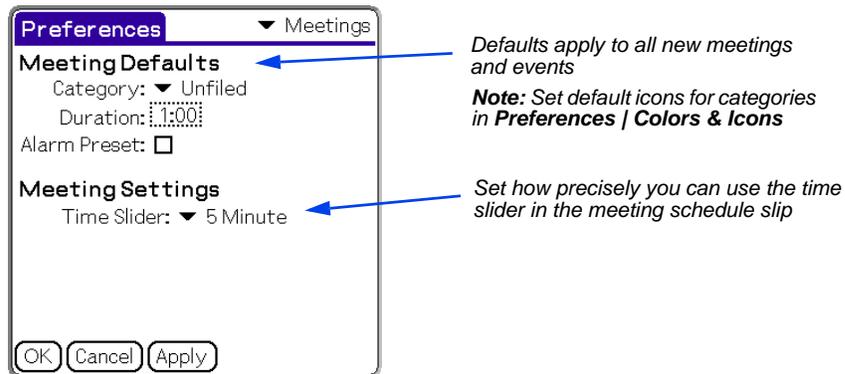
The different Storage Formats are as follows:

Storage Format	Palm Description Field	Palm Notes Field
Agendus	DESCRIPTION [contact]	N/A
ACT!PalmPilot Link	DESCRIPTION [contact]	N/A
Time Matters 3	[contact] DESCRIPTION	N/A
CompanionLink	DESCRIPTION Link: First Last Company: Co. Phone: 555-1212	N/A
Intellisync/Time Matters 4	DESCRIPTION	Contact name: Name Contact Company: Company

Meeting Preferences

Set the default values for new meetings and choose the scale for the time slider on the meeting schedule slip. Changing these settings will not affect any meetings already created.

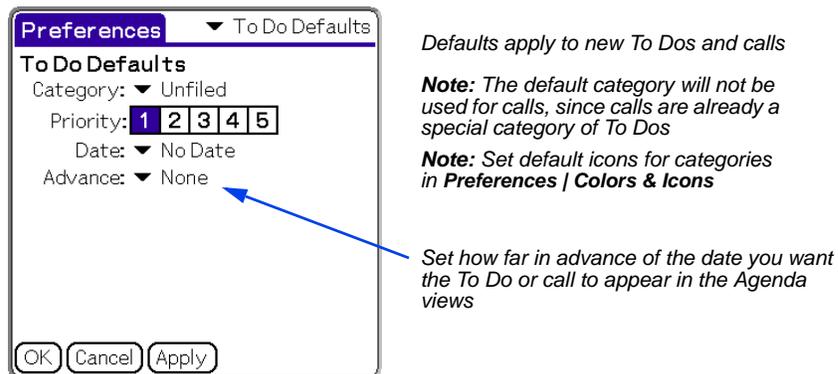
Select **Menu | Options | Preferences | Meetings**.



To Do Defaults

Set the default values for new To Dos and calls. Changing these settings will not affect any To Dos or calls already created.

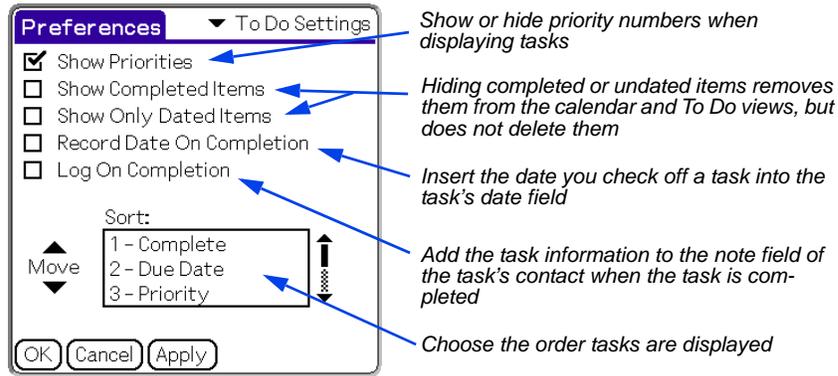
Select **Menu | Options | Preferences | To Do Defaults**.



To Do Settings

Set display preferences for tasks (To Dos and calls) and set actions for completed or dated items.

Select **Menu | Options | Preferences | To Do Settings**.

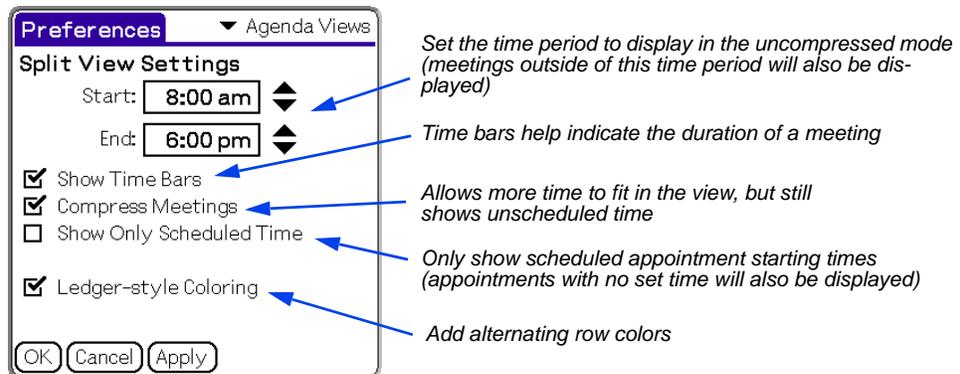


Preferences for Agenda Views

Set display preferences for upper-half of the split mode of the agenda (one-day) view.

In the uncompressed view, the upper-half of the split view shows an hour-by-hour schedule of the day, with meetings filled in where appropriate. The display preferences include options to make this easier to read and to compress this view to display more appointments.

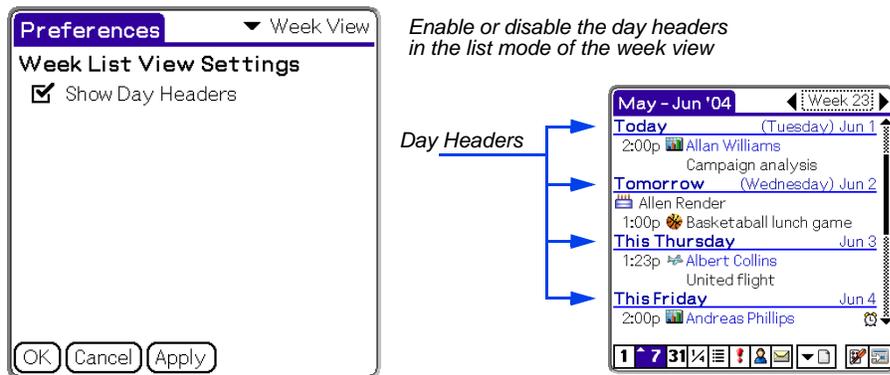
Select **Menu | Options | Preferences | Agenda Views**.



Preferences for Week Views

In the List mode of the week view, you can choose to display headings for each day in the list. If headers are displayed, you can tap on a header in the week view to switch the display to the agenda view for that day.

Select **Menu | Options | Preferences | Week Views**.

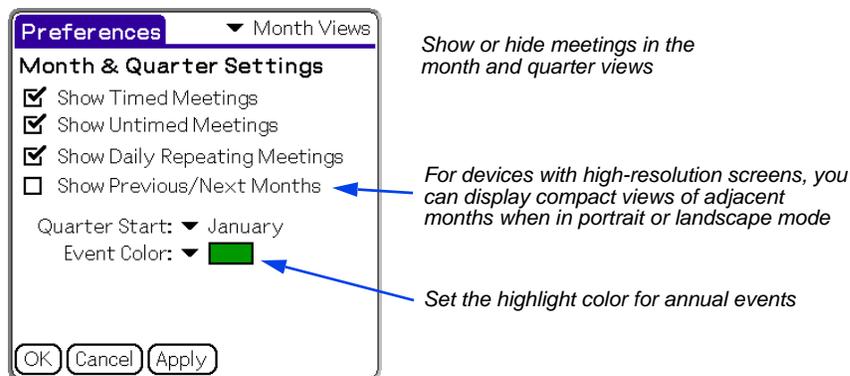


Note: To set which day weeks start with, Sundays or Mondays, go to your Palm devices preferences and choose **Formats | Week Starts**.

Preferences for Month and Quarter Views

These preferences affect both the month and quarter views. The “Event Color” setting is the color that the meeting indicator will be in the quarter view.

Select **Menu | Options | Preferences | Month Views**.

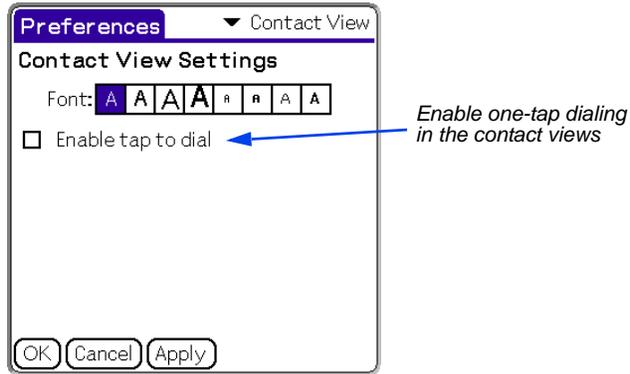


Additional filters are available by clicking the **Show Options** button  in the month or quarter view.

Contact View Preferences

Change the font size in contact views to fit more data or make them easier to read. For devices with telephony support, you can also enable dialing directly from Agendus.

Go to **Menu | Options | Preferences | Contact View**.



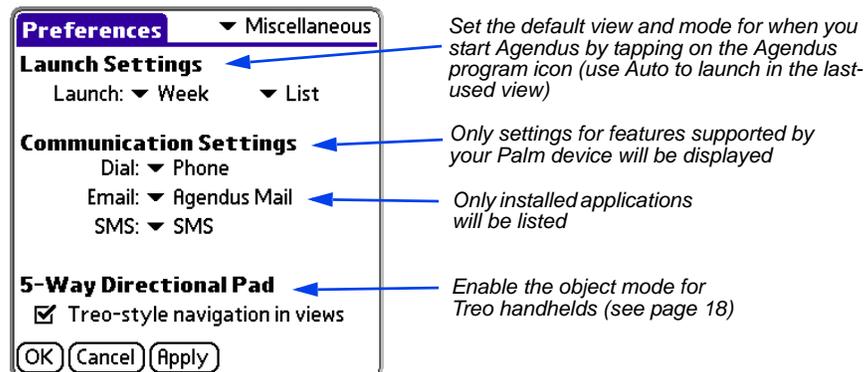
Note: Palm devices with high-density (most Palm OS 5 and higher devices) or high-resolution (all Sony Clie models) displays will have eight font choices. Other Palm devices will only show four font choices.

Note: Only Palm devices with dialing capabilities will show the tap to dial option.

Miscellaneous Preferences

Use the Miscellaneous screen of preferences to set how Agendus will launch. For Agendus Pro users, this is where you will set or change your dialing, Email, and SMS messaging settings.

Go to **Menu | Options | Preferences | Miscellaneous**.

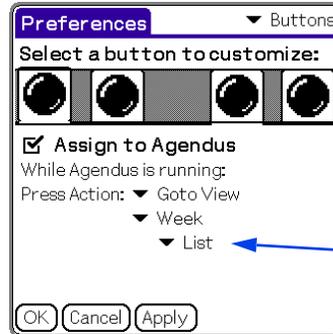


Note: The items listed in the Dial, Email, and Message menus are those applications installed on the Palm device that register themselves as helper applications in the Palm OS. If you have an installed application that is not listed in these menus, it may not be registered with the Palm OS. For example, Clie Mail does not register itself as a helper application and will not be listed.

Assigning Buttons to Agendus

Set and customize the way Agendus responds to any or all of the Palm device's hard buttons.

To define how the button actions, go to **Menu | Options | Preferences | Buttons**.



Tap a button and then select the action you would like it to perform:

Cycle Views: cycle through selected views

Goto View: Go to a specific view

Create New: Open the New menu

Choose **Auto** to go to the last-used mode for the selected view

Assign buttons to Agendus actions

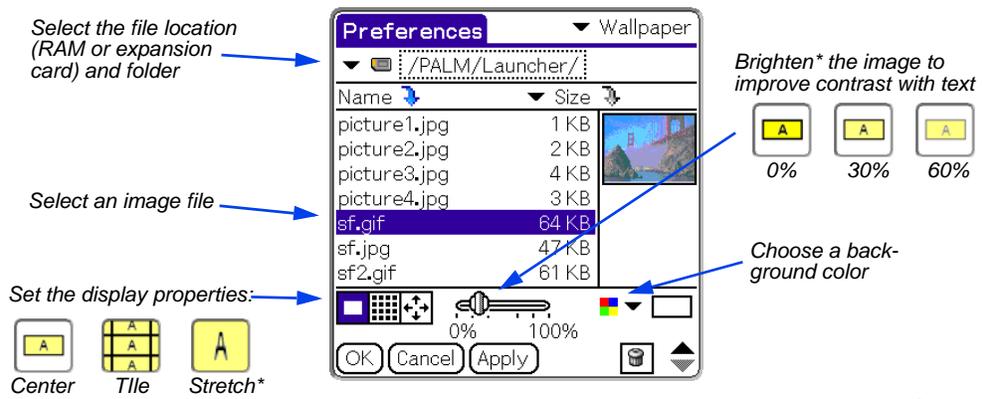
Setting Wallpaper and Background Colors

You can select images in GIF (non-interlaced) or JPEG (non-progressive) format to use as background wallpaper that displays in most Agendus views, or set a background color.

Several wallpapers in different file formats are included with Agendus. Use the Palm installer to copy them to your Palm device.

Note: For Palm devices using Palm OS 4.0 or earlier, your device must be equipped with a memory card (secure digital card or a Memory Stick, for example) to use GIF or JPEG files, or you can also use the included Windows application WallpaperConverter to convert GIF files to PDB files that can be read and stored on the Palm device's internal memory.

To add or change a background graphic or color, select **Menu | Options | Wallpaper** to open the wallpaper photo picker. This is similar to the standard photo picker shown on page 44, but includes several additional features.



* Available for GIF only

If you select both an image and a color, the image will be displayed in front of the color. If your image is not the same size as your screen, you will see the background color around the edges of the image.

To make text show up better over dark wallpaper, you can set text to display with a white outline by pressing the **Show Options** button  in one of the calendar views (see page 67).

Note: Wallpaper is never available in the Agenda split view or the Week block view. You can select to hide the wallpaper in other views using the **Show Options** tool . (See “Display Settings and Filters - Show Options” on page 66.) Displaying wallpaper in views other than the Today view requires Palm OS 5.0 or higher.

Wallpaper File Format and Resolution

Depending on the Palm device you are using, the resolution and screen area will vary. For the best image quality we recommend using the following image sizes and formats for full-screen centered wallpaper.

Please note that GIF images need to be in the non-interlaced GIF format and for best results you can use the palette option to 'Mac OS' and set the dithering to 'Diffusion 60-75%'.

Palm Device	Image Dimensions	Image Format
Palm IIIc, M505, and all other normal-resolution square-screen models	160 W x 130 H	GIF
Treo 600	160 W x 130 H	GIF, JPEG
Palm Tungsten C, T, T2, all other high resolution square screen models	320 W x 260 H	GIF
Sony NR series	320 W x 390 H	GIF
Sony NX series	320 W x 390 H	GIF, JPEG
Sony UX series	450 W x 260 H	GIF, JPEG
Palm Tungsten T3 if used in landscape mode	450 W x 260 H	GIF, JPEG
Palm Tungsten T3 if used in portrait mode	320 W x 390 H	GIF, JPEG

Copying a Wallpaper Image to a Palm Device

To put an image file onto the memory card of your Palm, use the Palm Install Tool on your computer.

1. Run the Palm install tool on your computer.
2. Click **Add** to view the Open box.
3. In the Open box, set "Files of type" to "All Files (*.*)"."
4. Browse to the image file and click on it to select it. Valid image files can be in GIF (non-interlaced), JPEG, or PDB format.
5. Click **Open** to add the file to the install list.
6. By default, PDB files will install to the handheld. To install a PDB file to the expansion card, click and drag it to the expansion card section of the installer (in older versions of Quick Install, click the **Change Destination** button).
7. Click **Done** in the install tool.
8. Hotsync  your Palm device.

Adding GIF Images from a PC to Palm Memory

For Palm devices using OS 4.0 or earlier, it is possible to use GIF images as wallpaper without a memory card. The Wallpaper Converter, a Windows application distributed with Agendus, can save non-interlaced GIF images on your PC as Palm-readable PDB files which you can sync to your device.

Note: Although WallpaperConverter is not available for the Macintosh, PDB files created on a PC can be transferred to a Mac by copying or via email, and then hotsynced with your Palm device.

1. Find the folder on your PC with the extracted Agendus files.
2. Double-click on WallpaperConverter to display an Open file box.



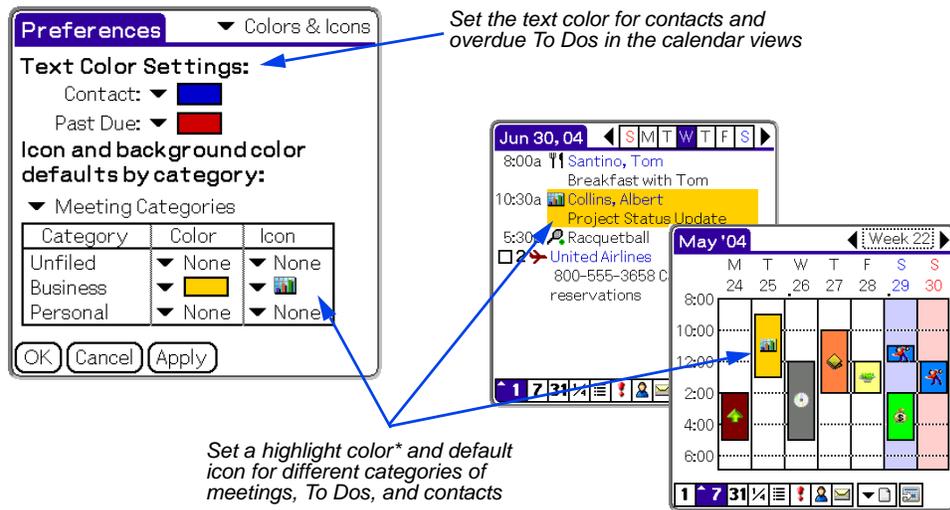
3. Select the GIF image you wish to convert and click **Open**. WallpaperConverter will create the PDB file and add it to the install list for the Palm device.
4. Click **Done**.
5. Hotsync  your device.

Color & Icon Preferences

Agendus has the same general capabilities and functions on both color and non-color Palm devices, though on the color models you can use color to make different types of data stand out. For example, in agenda views contact names are in blue text to distinguish them from descriptions.

You can also set the categories to use different highlight colors and different default icons so that you can quickly tell what category a contact or To Do is without having to view the item's details.

Go to **Menu | Options | Preferences | Colors & Icons**.



**Not displayed in split view*

Note: Changing the default icon for a category will not change the icons for any existing meetings, To Dos, or calls; default icons will only be applied to new items.

Agendus includes icon sets for different screen resolutions. You can edit these icons, create your own, or use other icon sets. See “Installing Icon Sets (Optional)” on page 12 and “Using, Editing and Moving Icons” on page 69.

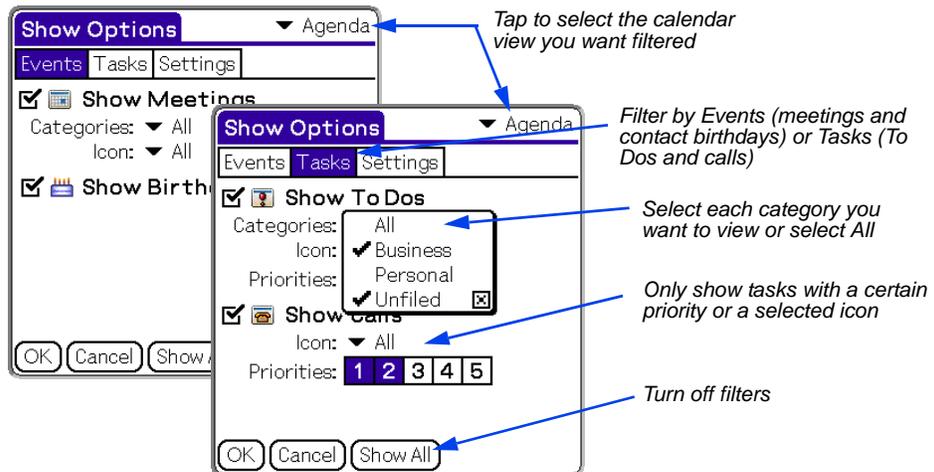
Display Settings and Filters - Show Options

These controls are for setting display settings and data filters for each view. Options for most of the calendar views can be set from within the same screen: the Today and To Do views have different options and can only be edited from within those views. The Contact View options are accessible in **Menu | Preferences | Contact View** due to screen-space considerations. For these exceptions please see the sections below.

Options for the Calendar Views

Filtering the Calendar Views

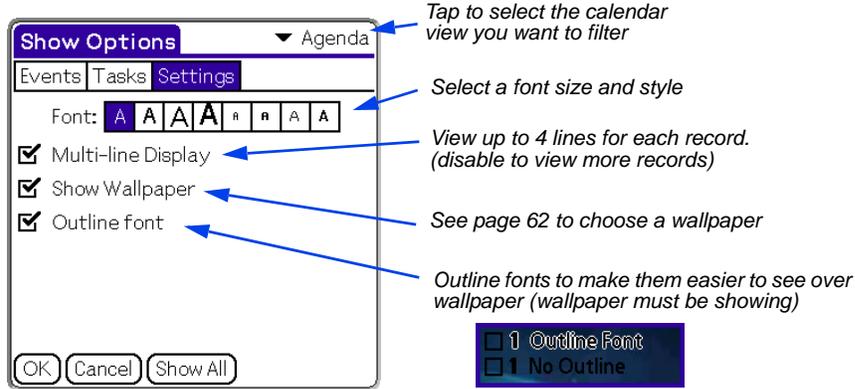
From any of the calendar views (agenda, week, month, quarter, or list), tap the **Show Options** button . (For the Today view options, see page 67; for contact options, see page 60.)



Note: If you filter by category and by icon, then only those records in the selected categories that also use the selected icon will be displayed. (i.e. it is an exclusive filter: show only meetings with the category *and* the icon, not meetings with the category *or* the icon).

Fonts and Display Settings for Calendar Views

From any of the calendar views (agenda, week, month, quarter, or list), tap the **Show Options** button .

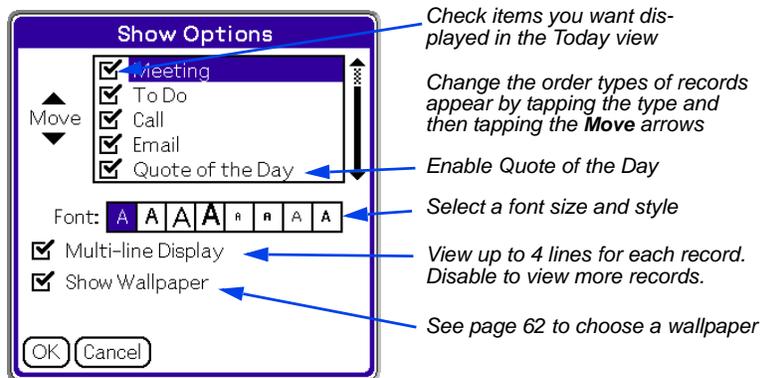


Note: Palm devices with high-density (most Palm OS 5 and higher devices) or high-resolution (all Sony Clie models) displays will have 8 font choices. Other Palm devices will only show four font choices.

Note: Wallpaper is never available in the Agenda split view or the Week block view. Displaying wallpaper in views other than the Today view requires Palm OS 5.0 or higher. (To set the wallpaper, see “Setting Wallpaper and Background Colors” on page 62.)

Setting the Today Mode Font and Display Options

From the Today mode of the Agenda view, tap the **Show Options** button .



Setting Up Quote of the Day

The Quote of the Day feature pulls quotes from a special memo in the Palm device's memo pad and displays them in the Today view.

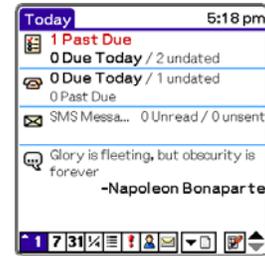
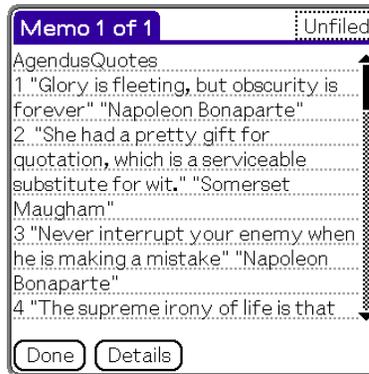
To use this feature, you must have a memo saved in your Palm device's Memo Pad with the name AgendusQuotes that is formatted in the following way:

- The first line should say AgendusQuotes
- Each following line should have a quote number, followed by a space, followed by the quotation, followed by a space, followed by the author. The quotation and the author must be in quotes.
- Each quote should start on a new line.

Create the quote list in the Palm memo pad



Memo Pad



If enabled, quotes are displayed in the Today view

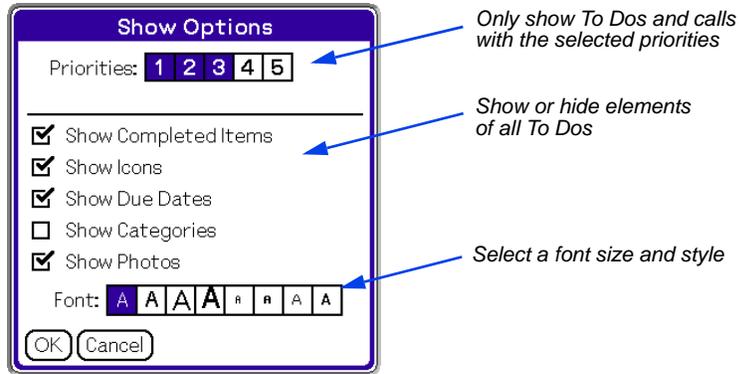
We have included a sample file, AgendusQuotes.txt, with the Agendus install files. We recommend opening this file, copying its contents, and then pasting the text into a new memo on your desktop application. You can then hotsync to add the memo to your Palm device.

Note: Quote of the Day must be enabled in the Today View options to use this feature. See page 58.

You can also install the western.pdb font which will enable the quote to appear in italics.

Fonts and Options for the To Do Views

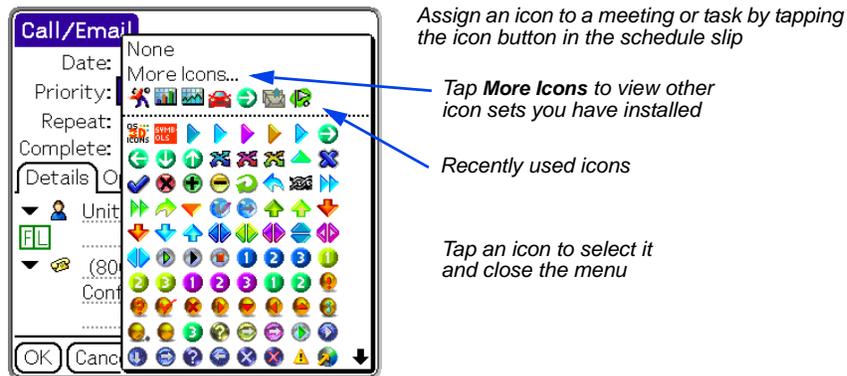
From one of the To Do views, tap the **Show Options** button .



Using, Editing and Moving Icons

Only a few icons are actually built into Agendus. To make the most use of icons, you should install one of the included icon sets included with the installation files. You can also install additional icon sets, available for sale from www.iambic.com and other vendors. Agendus supports multiple icon sets and also includes a built-in icon editor, so you can edit or create your own personalized icons.

To add an icon to a meeting or task, open the schedule slip and tap on the icon button.



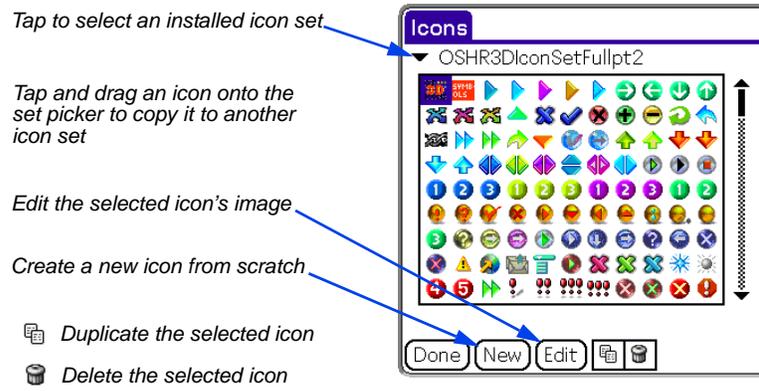
Tip: You can assign default icons to meetings and tasks by category (page 65) or by keywords (page 52).

Note: To use multiple icon sets, the sets must all use unique set names. For example, you can only install one of the icon sets included with Agendus at a time, since they all use the same icon set name (the file name is different from the set name).

Agendus supports double-density icons, as used by high-density Palm OS 5 and later devices with higher screen resolutions. Double-density icons can be more detailed without taking up any more screen space.

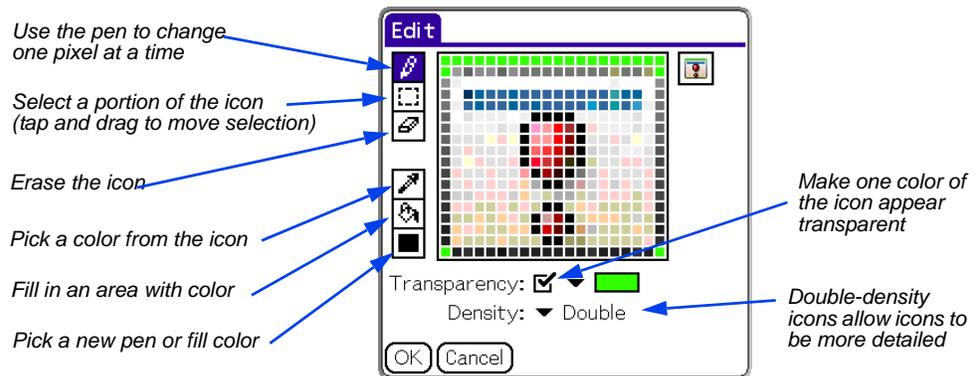
Editing Icons

To view the installed icons, select **Menu | Options | Edit Icons**, or from a schedule slip, tap on the icon list and select **More Icons**.



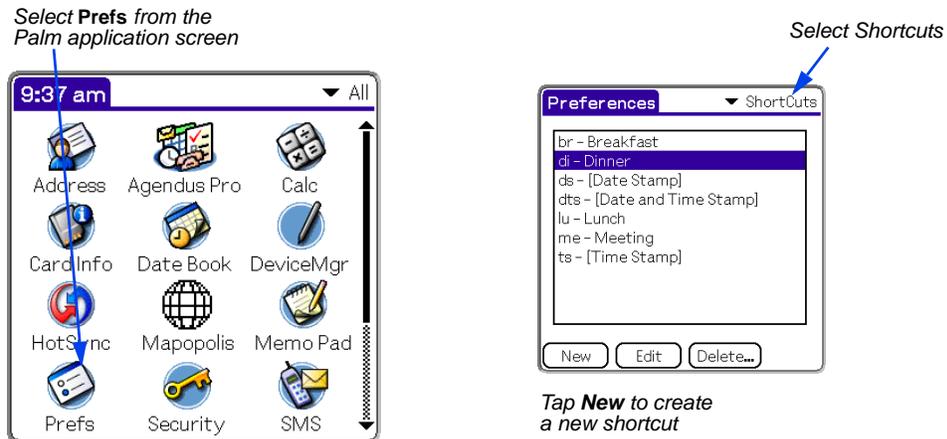
Tip: If you see an icon similar to what you want, you can select that icon, duplicate it, and then edit the duplicate. (Duplicates will appear at the bottom of the icon list.)

To edit an icon, tap on the icon and then tap the **Edit** button to open the Edit screen.



Using Text Shortcuts

If you find yourself using the same phrases and word combinations over and over again, as frequently happens when you schedule business appointments, you may want to set up a text shortcut for commonly used phrases. To do this, go to the Palm device's application screen, select the **Prefs** application, and choose **Shortcuts** from the top right corner drop-down list. Use the **New** button to add a new shortcut. Pick a series of letters that you will remember to represent the phrase.



You can use your shortcuts in an Agendus slip. To invoke a shortcut, make the shortcut symbol \mathcal{L} in the graffiti box, then enter the series of shortcut letters. The handheld device will recognize the shortcut and replace the shortcut letters with the assigned word or phrase.

For example if you find yourself using the phrase “status report,” you may want to make the shortcut for that “sr.”

Note: The Palm device will use the first recognized shortcut in the list. For example, if you have a one-letter shortcut that begins with the letter “m” listed above a two-letter shortcut that begins with the letter “m,” then the two-letter shortcut will never be executed because the one letter shortcut always executes before you have a chance to enter the second letter.

TROUBLESHOOTING AND SUPPORT

Frequently Asked Questions

Please check out the Agendus FAQ located on our website at www.iambic.com/agendus/palms/faqs.asp for a complete and updated listing of questions and answers concerning the software.

1. How do I access the other views?

Tap on one of the view buttons on the bottom of the screen to change to the agenda (one-day), week, month, quarter, To Do, or contact views. Once in the view, you can change the mode of the view (compact, expanded, photo, etc.) by tapping on the same button again and selecting the mode from the pop-up list. For example, switch to the week view by tapping the  button. The button will then change to look like . Tap this button to see the list of available modes for the week view.

2. How do I see the icons in the month view?

Tap on the  at the bottom of the screen then tap on  and select **Icon** mode.

3. I don't have a memory card or my Palm device doesn't have a memory card slot; can I still use the wallpaper feature?

Yes. The enhanced photo options in version 8.02 and later will allow you to use wallpaper on Palm devices with Palm OS 5.0 or later. If you are using an older device, the WallpaperConverter.exe application, included with Agendus, can convert non-interlaced GIF images to image files that can be stored in your Palm device's internal memory. (See "Setting Wallpaper and Background Colors" on page 62.)

4. What is ADVANCE on To Dos for?

This sets how far in advance of To Do dates you want to be able to see To Dos in the agenda (one-day) views

You can set a default value for this that will be applied on all new To Dos by going to **Menu | Options | Preferences | To Do Defaults**.

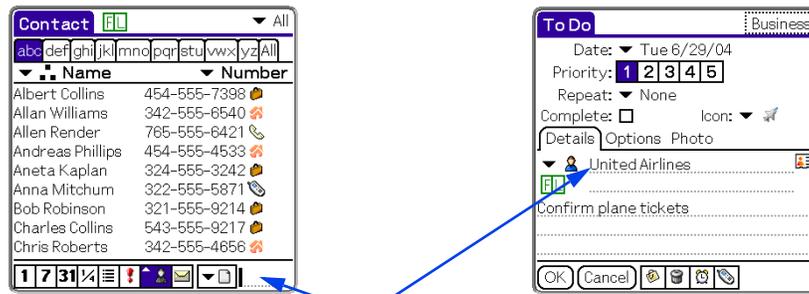
5. I am not able to synchronize my Agendus.prc file to my handheld device.

Check the amount of space in Memory that you have left on your handheld device. Agendus requires 900 KB of space. Also make sure the handheld device user name is correct when you queue the.prc file using the install tool.

6. How can I quickly access a Contact Name from a long list of Contact Names?

Agendus supports quickfill. In a schedule slip, start writing the contact's name and Agendus will try to fill in the name for you. Keep writing or typing the name until the correct name is shown, or tap the **Contact List** button  to view a list of matching names.

In a contact view, start writing or typing the name in the quick fill area and Agendus will scroll the view to that name.



Tap here and then use graffiti or your keyboard to start writing or typing the contact's name

7. How do I start Agendus with the datebook button?

Start Agendus then tap **Menu | Options | Preferences | Buttons** and select which button you want Agendus to respond to and what view or action you want this to have in Agendus. (See “Assigning Buttons to Agendus” on page 61.)

8. Where do I find Agendus for Windows?

The desktop version of Agendus is available at www.iambic.com

9. When do alarms sound on untimed meetings?

They do not sound: the alarm notification will appear on the screen when the Palm is first turned on for the day that this untimed meeting is scheduled. This is consistent with what the native Palm datebook does for notification of alarms on untimed meetings.

10. How can I view completed To Dos or calls?

Start Agendus then tap **Menu | Options | Preferences | To Do Settings** and make sure “Show Completed Items” is checked, then tap **OK**. Your completed

tasks will now show up in the To Do and selected calendar views. The text for the completed tasks will have a strikethrough to show it has been completed.

11. How can I remove a program from my Palm?

Go to the applications list then tap **Menu | Delete** then select the application that you want to remove.

12. How many categories can I have?

You can have up to 15 categories each for meetings, To Dos, and contacts.

13. How do I set the meeting color for meetings shown in the week block mode?

The color shown for each meeting in this view is the text color set on that meeting.

14. How can I find out what the latest version of Agendus is?

Visit www.iambic.com/support/productline.asp.

15. How can I find out what version of Agendus I am using?

In Agendus tap **Menu | Options | About**.

16. How can I make the fonts bigger in Agendus?

In most views there is a **Show Options** button  in the lower right corner; tap that button and then select the **Settings** tab and choose a larger font. For the Contact view go to **Menu | Options | Contact View** and then select a larger font.

17. How can I revert back to my older version of Agendus?

If for some reason after installing version 8 you prefer to use your previous version, here are the steps you'll need to take

1. Delete Agendus 8
2. Hotsync
3. On your desktop, double-click on the PRC file for your earlier version of Agendus: this will queue it for installation.
4. Double-click on the icon set you want to use to queue it for installation.
5. Hotsync.
6. Launch Agendus and re-enter your previous version's unlock code.
7. If you are reverting back to version 6 or earlier, you will need to re-link your icons with your meetings, calls and To Dos.

Service and Technical Support

To obtain support visit www.iambic.com/support.

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