

Pocket SalesMate



Technology for the Moving Industry

Operator's Manual

March 2004

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Preface

TechMate International is dedicated to the Moving Industry and is committed to be your technology partner (or Mate). **Pocket SalesMate** is one of the products in the **TechMate** family.

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1.0 Introduction

2.0Microsoft ActiveSync

Prior to installing Pocket SalesMate onto your PDA make sure that you have installed the Microsoft Active Sync software onto your desktop computer. This can be done one of two ways: An Active Sync CD disc might have come in the box with your PDA, or you can also download it off of the MicroSoft website

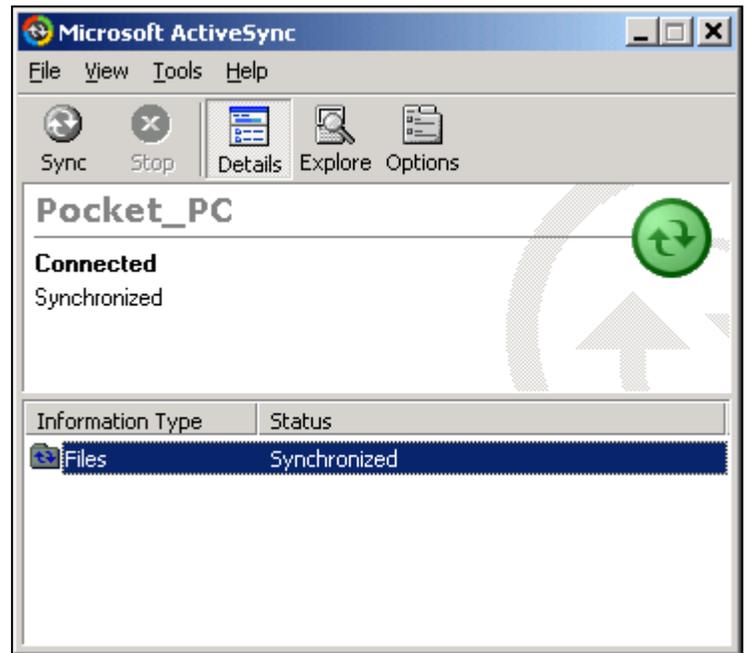
(www.microsoft.com). After you have inserted the CD or selected to download it from the website, follow the defaults to install.

2.1 Setting up a Partnership

You must establish a partnership with a PC in order to install or update Pocket SalesMate in your Pocket PC.

The first time you connect your PDA to the computer after installing the MicroSoft ActiveSync software a screen will appear prompting you to “set up a partnership”. To do this- complete the following steps:

- a: Select the option to set up a “standard partnership”
- b: Select the option to “Synchronize with your desktop computer”
- c: It will then bring up a page for you to select the items that you wish to synchronize with your PDA- This allows you to synchronize your contacts, calendar, inbox etc. with your PDA. The only item that MUST be synchronized is Files. Once you have selected Files click “ok” and then “Finish”



Once this is completed: a Microsoft ActiveSync window will appear on your desktop showing that your PDA is both connected and synchronized. From this point on- each time you connect your PDA to the computer the ActiveSync window should pull up automatically.

2.2 Loading Pocket SalesMate software

Once you have loading the ActiveSync software and connected your PDA to the computer you are ready to load the software. Make sure that the ActiveSync window on your desktop is showing your PDA as being both connected and synchronized.

On your desktop computer, go onto the Internet and go the www.TechMateIntl.com website. Under Updates select PocketPC. At the bottom of that page, click on the where it reads “Pocket SalesMate with Rating Versions.”

You must first determine which model of PDA you are loading (i.e. 2002 or 2003) Under the section that reads “new user installs” click on the link that matches the year on your PDA (2003 PDA would select the Pocket SalesMate 03 version) Enter the Username and Password. Select the option to Open or Run. Note that Netscape and some of the other web browsers do not give the Open or Run options. If you select the Save option, note the name of the file and where the file is being saved and go ahead and save. You will then need to manually go to the directory that the file was saved and double click and run it. Once you Run the file- follow the following steps to complete the download process:

- a. You will be asked if you would like to “Install Pocket SalesMate PSM”- answer Yes
- b. Would you like to “Setup in the following destination folder”- click OK
- c. Install Pocket SalesMate PSM- answer Yes
- d. You will then be prompted to “check you mobile device to see if any additional steps are necessary” on your desktop computer click the OK button.



- e. On your PDA you will be at a screen asking you if you would like to “replace existing files”. *Always select the box in the bottom right corner “No to All”*

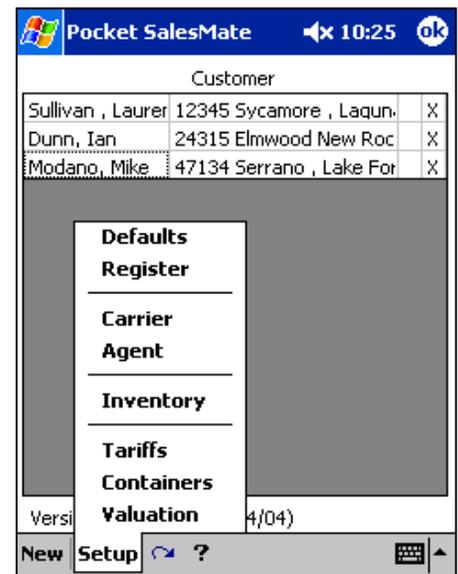
Please note that if you are installing the Pocket SalesMate software on a 2003 or 2004 model you will also have to download the “Runtime” file which can be found on the www.TechMateIntl.com website directly under the Pocket SalesMate03 new user installs. There is no password necessary for this download. Open or Run the file, and follow the defaults to install.

Once the PDA has completed copying files, you can open the program by clicking on Start and going into the Programs folder. You will then see a Pocket SalesMate icon. Click on the icon and the Pocket SalesMate program will open up. All new user installs download in the form of a 7-day trial period. When you get to this point you will need to contact TechMate International to provide a key for the extended license.

2.3 Installing Pocket SalesMate Updates.

Make sure that your Pocket PC is in connected and synchronized with your desktop computer. Close down the Pocket SalesMate program on your Pocket PC and get it to the main start menu. On your desktop computer- go to the www.TechMateIntl.com website. Under the updates section click on Pocket PC. At the bottom click on the link to bring you to the rating versions of the software. The newest version will be located toward the top of the page and listed and an “Update for all users” Double click on the link and enter your user name and password. You will want to choose the option to either open or run the software. Follow the defaults to go through the installation. You will be brought to a prompt asking you to “check your mobile device for any additional steps” Your Pocket PC will be at a screen asking you if you want to reinstall/upgrade the software and answer ok. You will then be at a screen asking you if you would like to replace existing files - **always answer “NO TO ALL”**. When your Pocket PC has completed copying the files, you can open the program and you will then be running the most current version.

On the www.TechMateIntl.com website there is a place for you to register to receive e-mail notifications whenever a new version of the software is released. You can also monitor the website occasionally to verify that you are always running the most current version of the software.



3.0 Pocket SalesMate, Setup

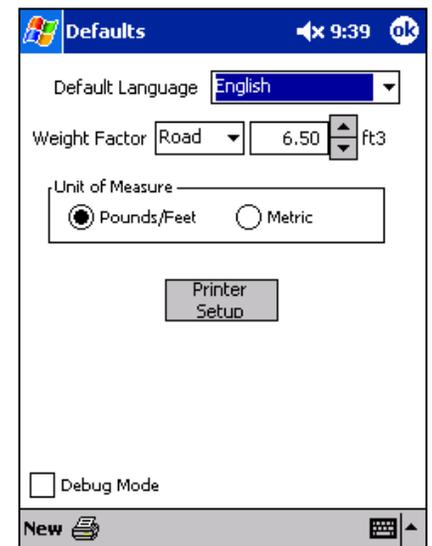
When you tap on Setup you will get a list of Pocket SalesMate Setup options. These are divided in areas as shown in the diagram. The first area is Defaults and Register

The second area has to do with setup of Carriers and Agents.

The next is Inventory. This is where you can make modifications to the inventory lists, and also create customized articles.

The last area is for Setup of the Tariff, Container and Valuation files.

- a. Defaults
 - b. Register
 - c. Carriers
 - d. Agents
 - e. Inventory
 - f. Tariffs
 - g. Containers
 - h. Valuation
- Rating Version's only
Rating Version's only
Rating Version's only

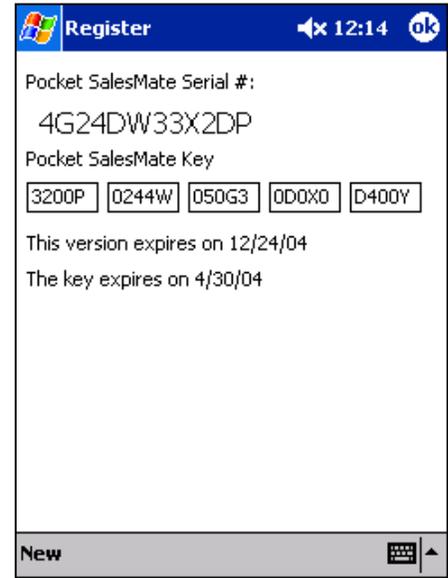


3.1 Setting up Defaults

When you tap on the Defaults section of Pocket SalesMate it allows you to set the language, the weight factor and also adjust your printer settings. When you tap on the Printer Setup button you will be able to select your default printer driver. The Canon BJC 85 & 55 printers work with the CanonBJ(360DPI) driver and the HP 450 printers work with the HP PCL driver. Here is also where you adjust the paper margins and paper size.

3.2 Registering Pocket SalesMate

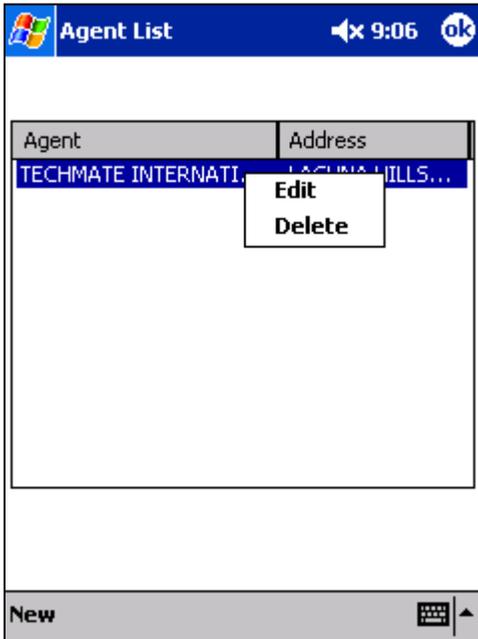
The register section of Setup will display the unique Serial number for this installation of Pocket SalesMate. When you contact Techmate International to obtain a key, you will need this serial number and you will be given a key. To enter the key, place the cursor in the first group of boxes. Then begin entering the key exactly as it is given to you. Once the first box is filled up it will automatically tab over into the next box and so on. When you have completed entering the key, date will be displayed below the row of boxes indicating when this current key will expire.



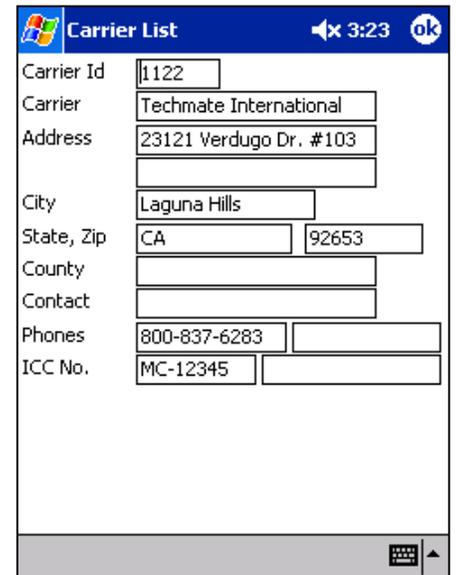
3.3 Managing Carrier Lists

A list of Carriers can be created and maintained in Pocket SalesMate from the Carriers screen.

The Carriers screen can be found by tapping on the “Carriers” option in the Setup Menu on the Main screen. The Carriers screen will display a complete list of all the Carriers that have been added to Pocket SalesMate. To add a new Carrier, tap on the New button in the bottom left corner. To view or modify a Carrier, simply tap on the agent. To delete, press and hold your stylus on the agent and an Edit or Delete option will pop up.



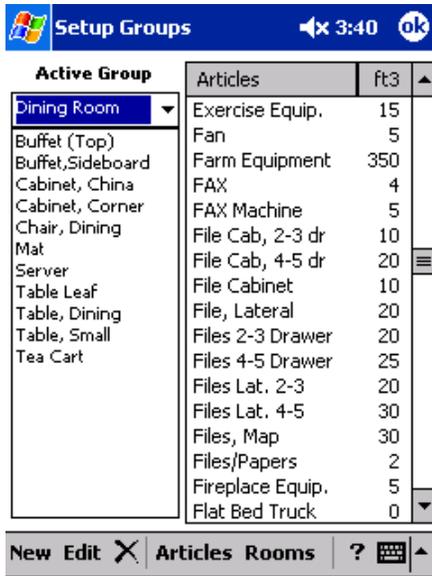
For agents not under their own authority, it is recommended that if your carrier is not already in the carrier list, you obtain a Carrier file for your carrier from www.TechMateIntl.com under the Pocket SalesMate section of the website. This will include the carrier address and valuation file for the 400N



3.4 Managing the Agents List

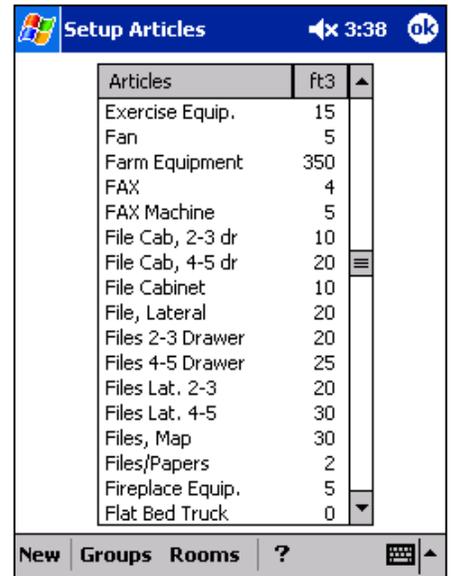
A list of Agents can be created and maintained in Pocket SalesMate from the Agencies screen. The Agencies screen can be found by tapping on the “Agent” option in the Setup Menu on the Main screen. The Agencies screen will display a complete list of all the agents that have been entered into Pocket SalesMate. To add a new agent, tap on New button in the bottom in

the bottom left corner. To view or modify an agent, simply tap on the agent. To delete, press and hold your stylus on the agent and an Edit or Delete option will pop up.



3.5 Making Changes to Inventory

In the Inventory section of Pocket SalesMate setup you can make changes to articles in the master inventory, as well as create new custom articles. To create a new custom article tap on “New” in the bottom left corner and type in the article description and enter the number of Cubic inches you would like this article to default on. You can



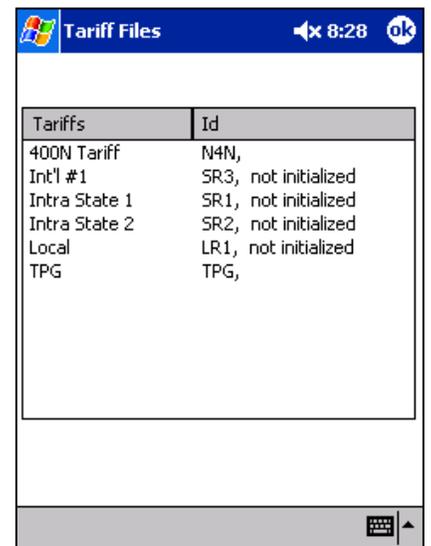
then select if you would like this article to appear in the HHGI, or the O&I list.

You can also make changes to articles that already appear in the master inventory list. To edit the article description or make changes to the cubic inches of an article, simply tap on the article name and then on Edit in the bottom left corner. To change the room list that the article appears in, tap on the article name and then on Groups near the bottom of the screen. You can then select the room list that you would like this article to appear in.

All changes made in this part of the inventory will stay set as the defaults during all inventories. There is also a way that you can temporarily create a new article, or adjust the number of cubic inches of an article during the survey process, we will cover this later in the manual.

4.0 Setting up Rating Files

Pocket SalesMate is a fully functional rating tool so all, which will require you to create and manage valuation, container and tariff, defaults. These files can either be downloaded from the www.TechMateIntl.com Website, or from FirstMate to eliminate repetitive data entry.



4.1 Managing the Tariff Files List

The list Tariff files is maintained in Pocket SalesMate from the Tariffs screen. The Tariffs screen can be found by tapping on the “Tariffs” option in the Setup Menu on the Main screen. The Tariffs screen will display a complete list of all the tariff files that can be used in Pocket Salesmate and their current status, Not Initialized or Initialized (blank entry in the Tariff screen). Tariffs must be initialized prior to using them in Pocket SalesMate. To view or initialize a tariff file, simply tap on the valuation file. Tariff files cannot be added or deleted from Pocket SalesMate. If you are missing a tariff file, contact TechMate International to obtain a file that will add the tariff to your list.

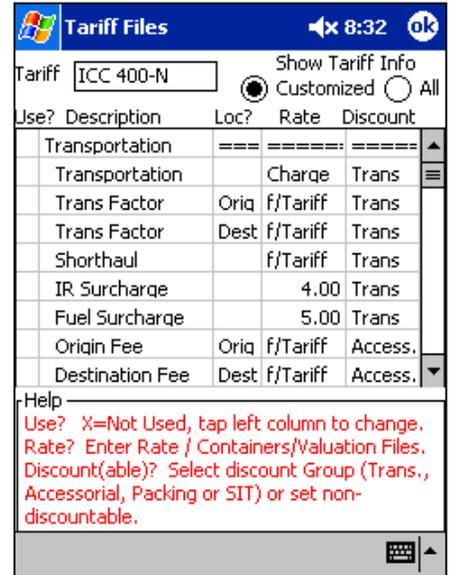
Tariffs must be initialized before they can be used. Tariff items are arranged in Groups for display and report purposes. Groups are shown with trailing “=” as shown in the example. Both Groups and Items can be turned on or off by clicking the left column. An “X” indicates that the group or item has been turned off. If the “Show Tariff Info” selection is “Customized” Groups and Items that have been turned off will not be displayed. To display all Groups and Items, select “All” below “Show Tariff Info”. If a Group is turned off, all Items in that Group will be effectively turned off (it is not necessary to turn the Items off).

Containers are a special case. If you want to use a Single Pack Rate (combine the container and packing rates into a single pack rate), set an “X” in the left column.

If the rate for an Item is not published with the Tariff, click on the Rate column and enter the desired rate.

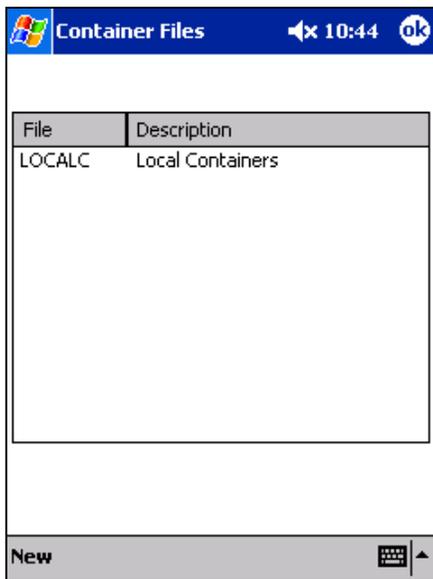
The discount column indicates if an item can be discounted and if discounted, what group it is discounted with. If you want to change how the item is discounted, click on discount column. An “---” indicates that the Item can’t be discounted.

Local tariff files that have been previously set up in FirstMate can be downloaded from FirstMate into the Pocket SalesMate to eliminate repetitive data entry.



4.2 Managing the Container File List

A list of Container files can be created and maintained in Pocket Salesmate from the Container screen. The Container screen can be found by tapping on the “Container” option in the Setup Menu on the Main screen. The Containers screen will display a list of all Container files that have been entered.



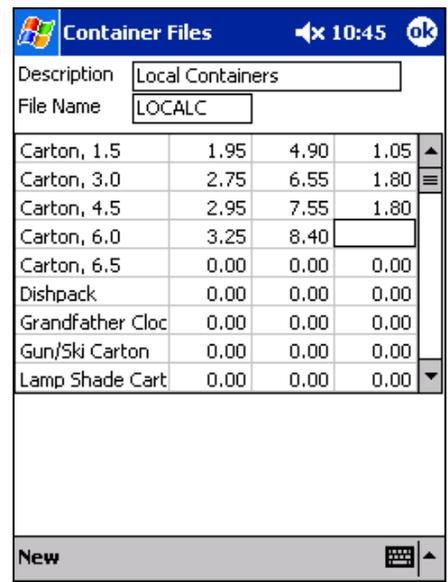
To add a new container file, tap on “New” in the bottom left corner.

To view or modify an existing container file, simply tap on the container file.

To delete a Container File, tap and hold down your stylist on the container file that you wish to delete, an edit/delete option will appear.

4.2.1 Setting up a Container File

If you are Rating with the Local, Intra-State, International, TPG or APP Tariffs in FirstMate or SalesMate/Telxon, you will need to enter a Container File for these tariffs.

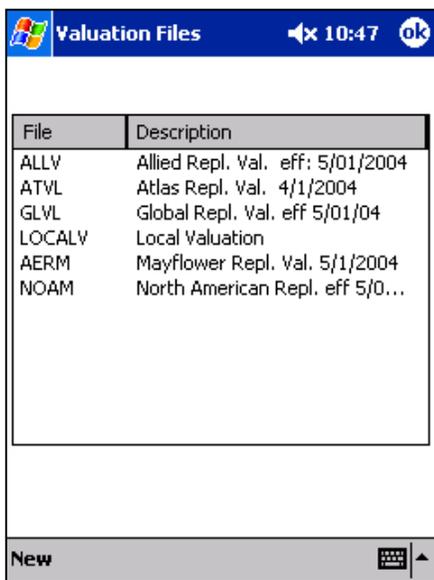


Each Container File needs a Description and a File Name. The description should describe what the container file is for (e.g. Local Packing Rates). The File Name is used within the Tariff to identify the Tariff. The file name is limited to 8 characters (limited to alphabetic (a-z) and numeric (0-9) characters, no “.”, “/”, “\”, etc).

The Container Rate file has entries for the Container (material) rate, the Packing Rate (labor) and the Unpacking Rate (labor). All TechMate Tariffs allow you to show Container and Packing Rates separately or combined into a Single Packing Rate. This is done in the Setup of each individual Tariff. If a Single Packing rate is used, the Container and Packing Rates will be added together. Allied’s TPG Tariff uses unpacking rates from the published Tariff, so the unpacking rate (if entered) would not be used. The 400N tariff uses rates published with the tariff and does not use a Container File.

Container files that have been previously created in FirstMate can be downloaded from FirstMate into Pocket SalesMate to eliminate repetitive data entry.

4.3 Managing the Valuation File Lists



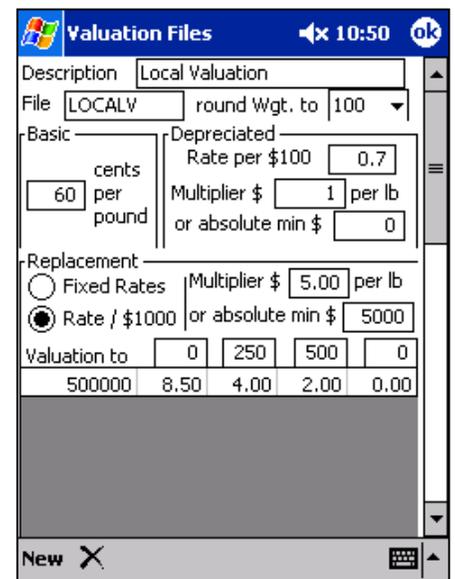
A list of Valuation files can be created and maintained in Pocket SalesMate from the Valuation screen. The Valuation screen can be found by tapping on “Valuation” option in the Setup Menu on the Main screen. The Valuation screen will display a complete list of all the Valuation files that have been entered into Pocket SalesMate. To add a new valuation file, tap on the New button. To view or modify a valuation file, simply click on the valuation file. To delete, tap and hold down your stylus on the valuation file that you wish to delete, an edit/delete option will appear.

4.3.1 Setting up a Valuation File

Setting up valuation files in Pocket SalesMate is divided into 3 sections. The first section is the Description and File name. Enter any description that best describes what the valuation file is for. For the file name, you can only use alphabetic (a-z) and numeric (0-9) characters, no “.”, “/”, “\”, etc.

Most major Carriers can obtain a pre-built carrier valuation file for inter-state tariffs from the www.TechMateIntl.com website. When downloading the Carrier, the most current Valuation Rates will be included. Agents operating under their own inter-state authority MUST use the Carrier Id that was entered for their Carrier for the File Name in the Valuation File (it is recommended that you use your SCAC code for this ID).

The second and third sections are for entering the Basic and Depreciated Valuations. Rates must be entered into the fields, so if you do not use Basic or Depreciated valuation, make the rates 0.



The final section of the valuation screen pertains to the Replacement valuation. There are two types of replacement valuation, Fixed Rates and Rates per \$1000. Make sure you enter the appropriate type before entering rates because any replacement rate entered will be cleared out when changing type. You will be able to enter up to four deductibles and any deductible not used can be left blank. To enter rates, tap on the “New” to add a line for rates. For Fixed Rates, on the new line, enter the Valuation and rates for each deductible. Enter the maximum valuation you will sell under the “Valuation to” amount. The rates for Rates per \$1000 can include the decimal or cents. If you leave the decimal off, Pocket SalesMate will automatically add it. (i.e. if you enter 10, Pocket SalesMate will display it as 10.00.)

Valuation files that have been previously created in FirstMate can be downloaded from FirstMate into Pocket SalesMate to avoid repedative data entry.

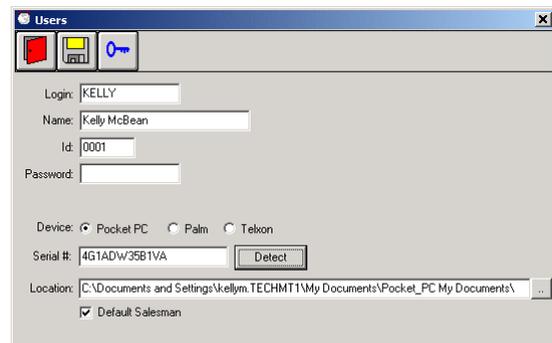
5.0 Downloading Rating Files from FirstMate to Pocket SalesMate

Tariff, Valuation, and Container files that have been previously created in FirstMate can be downloaded from FirstMate to Pocket SalesMate to avoid repetitive data entry. To do this, you must first set up a connection between FirstMate and Pocket SalesMate.

5.1 Setting up a Connection with FirstMate

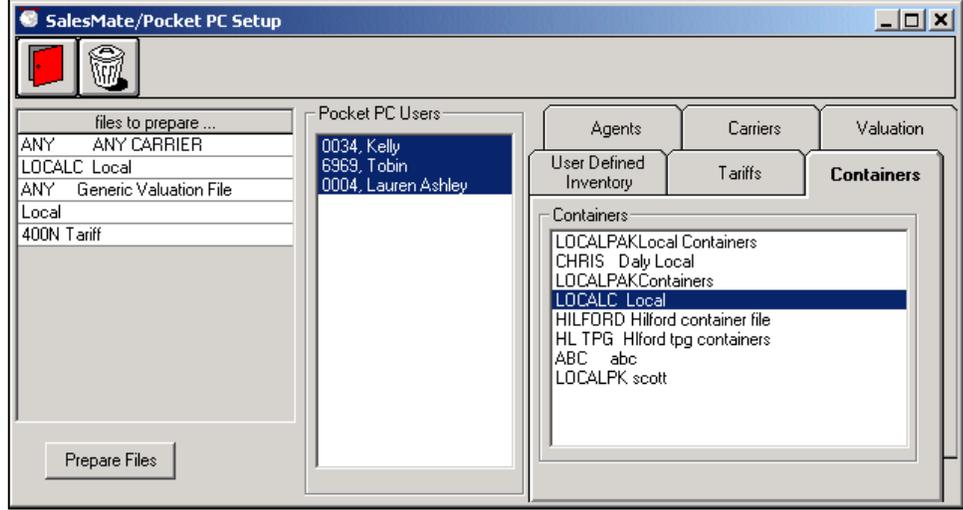


Start Pocket SalesMate and Sync the Pocket PC device. A partnership must be established; it cannot be setup as a guest. When the partnership is created, in the synchronization Settings screen, make sure the Files is checked so files will get synchronized. In Pocket SalesMate, go to the Register screen. (Setup | Register) The PDA’s Serial # will be displayed at the top of the screen. On your desktop computer go into the FirstMate program. Click on Setup and go down to the “Users” section. Select the user that will correspond to this Pocket SalesMate. If the user is not there, clicking on the icon of the yellow folder can create a new user. Go back into the Users Screen and select the user that will correspond to this Pocket SalesMate. On FirstMate make sure the Pocket PC button in selected and enter the Device Serial Number into the Serial # box. Establish the link by clicking on the Detect button. When the “FM_Sync.PSM” file is found, the location of the Sync folder will be entered into the Location box. Click the yellow disk to save the user information.



5.1.2 Downloading Tariff, Valuation & Container files from FirstMate to Pocket SalesMate

Once a connection between FirstMate and the PDA has been made, you can begin to download files from FirstMate into Pocket SalesMate. Make sure that your PDA is connected to the computer and synchronized. Close down the Pocket SalesMate program so that the PDA is on the main Start screen. Open up the FirstMate program on your desktop computer; click on Setup and then on Pocket PC. A window will

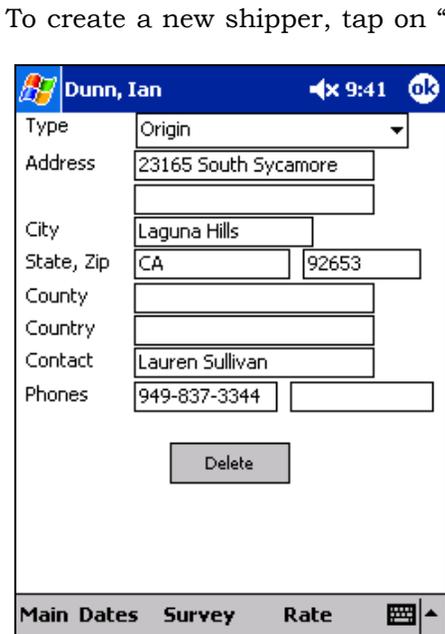


popup displaying the Pocket PC users that are set up to share files. Make sure that the name of the Salesperson that you wish to download files to be highlighted in blue. There are then 6 tabs to the right that display Agents, Carriers, Valuation, Inventory, Containers and Tariffs. Click on the tab that corresponds to the file that you wish to download, and then find the file name within that section. (i.e.- if you are downloading the local container file, you would click on the Container tab and find the Local Container file) After you have selected all of the files that you wish to download, click on the “Prepare files” button near the bottom. A message stating “Files Prepared” will then be displayed in red writing to the right of the Prepare files box. After you have completed this, leave your PDA on the cradle and proceed to open up the Pocket SalesMate program. Pocket SalesMate will then begin to process the downloaded files and the status of the download will appear in red writing across the bottom of the PDA screen. When the download is complete the Pocket SalesMate will open up to the main customer screen.

6.0 Entering Customer Information

Now that Pocket SalesMate is setup and you’ve have a chance to see the ways in which it can be configured to better assist you, it’s time to put it to use.

6.1 Creating a Customer in Pocket SalesMate



To create a new shipper, tap on “New” in the bottom left corner. All of the shipper and consignee information is entered on this screen. Under to Locations section, tap on New to enter in the Origin address. Once that information is entered tap on the “OK” button in the top right corner, the area to enter in the Destination address will pull up. When the Destination information is entered tap on the “OK” button. This screen is also where any Extra Pickup/Delivery information would be entered. To enter this information, tap on “New” under the location section. Click on the drop down arrow next to the “Type” field. Then select either Extra Pickup or Extra Delivery, which ever applies to this particular move. Enter in the address



information below. After you have completed that tap on the “OK” button.

The section below the Location field pertains to the Agents. To select the Origin agent, tap on the blank line next to Origin and the Agent List will pull up. Select the Agent you want for this move. In the main setup of the Agents, you can select an Agent to be set as the Default Origin Agent, by selecting this option the Origin Agent will automatically be selected for each new customer.

To assign a Destination Agent, follow the same procedure.

You can assign a Carrier by tapping on the drop down arrow next to Carrier. Your Carrier list will pull up showing all of the Carriers that have been loaded into Pocket SalesMate. Tap on the Carrier that you want to assign to this move.

Dates that apply to this move are also entered on this screen. By tapping on the “Dates” button in the bottom left corner, you can enter in the date of the Estimate, the Book date, Pack date, Load date, etc. Tap on the “Main” button after you have entered in the dates.

6.2 Creating a Survey in Pocket SalesMate

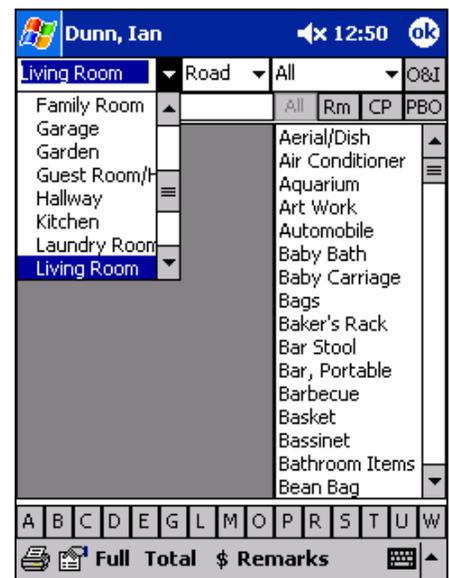
You can begin a survey by tapping on the “Survey” button. The Survey button is found near the bottom left corner in the Shipper’s Primary Data screen. Surveys can be created using English or Metric units of measure (see Default tab in Setup) and displayed in a number of languages including English, French, German, Portuguese, Spanish, Dutch, with more languages on the way. (See Default tab in Setup)

The Inventory List

Displayed in the upper left corner of the Inventory screen is the room list. The Rooms are listed in Alphabetical order. To move throughout rooms during the survey process, tap on the drop down arrow the right of the room name and tap on the new room you would like to move to.

Displayed near the upper right corner are the 4 “sort by” options. (All, Rm, CP, & PBO) These four options control what is displayed in the inventory list. Selecting “All” will display the full inventory in alphabetical order. Selecting the “Rm” option will display the Group list that is associated with the current room being surveyed. The “CP” option will display a list of Carrier Packed items (i.e. cartons, crates, dishpacks, wardrobes, etc.) The “PBO” option will display the Packed by Owner list.

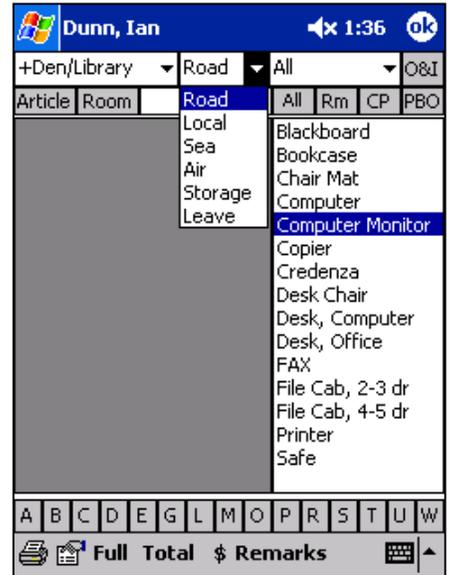
In addition to these 4 options, there is a list of buttons with the alphabet listed that are displayed below the inventory list. These buttons can be used to jump to the first article in the active list that corresponds to the letter selected



6.2.2 Setting the Mode of Transportation

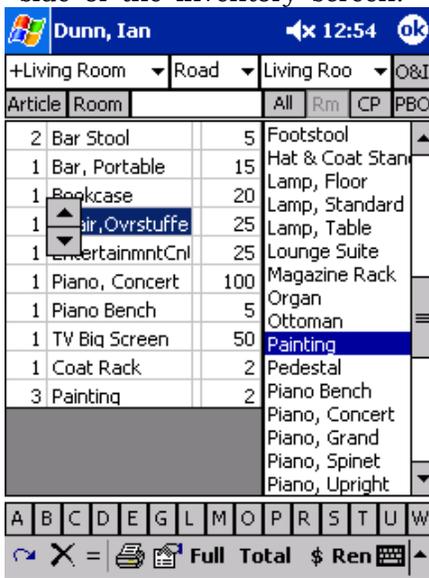
Pocket SalesMate is a Multi-modal surveying tool. You can select the mode of transportation one of two ways. Displayed to the right of the Room List is a drop down list of Modes. Pocket SalesMate uses the standard list of modes similar to TechMate Internationals other products that include Road, Local, Sea, Air and Storage. To select a mode, tap on the drop down list and select the mode you wish to use.

In addition to this method of selecting the mode, there is another way to change modes during the survey process. This method will be discussed later in the manual. (6.2.8 Moving Articles during Survey Process)



6.2.3 Adding Articles to the Survey

To add an article to the survey, tap on the article in the inventory list. Once an article is added into the survey, it will be displayed on the left side of the inventory screen. Increasing the quantity of articles in the



inventory can be done one of three ways:

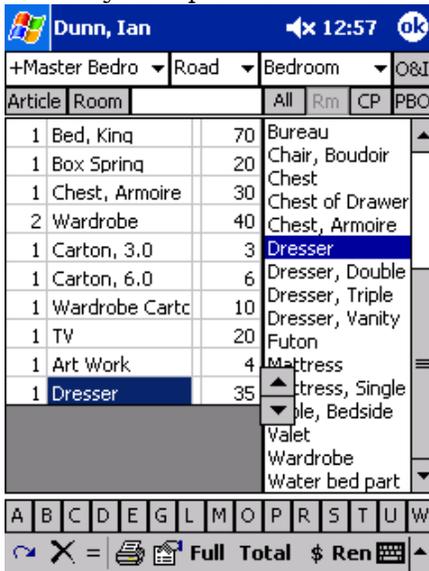
Tapping on an article or carton that has already been surveyed and does not have a comment associated with it will increase the quantity of the surveyed article.

Once an article is selected and has moved over to the surveyed list on the left side, tap on the quantity number to the left of the article name. Simply tap the arrows up or down to adjust the quantity.

Select the article you would like to add to the survey. Make sure that the article name is highlighted on the left side of the survey screen, then tap on the “ = ” button near the bottom left corner of the survey screen. An “Article Quantity” screen will appear and allow you to select the quantity for this particular article. Once you have entered the quantity you would like, tap on the “Set” button.

6.2.4 Changing the Size of an Article

When you add an article to the surveyed room list, the Cubic Size is displayed to the right of the article name. When you tap on Cubic number, arrows pointing up and down will appear. To increment or decrement the



size, simply tap on the arrows up or down.

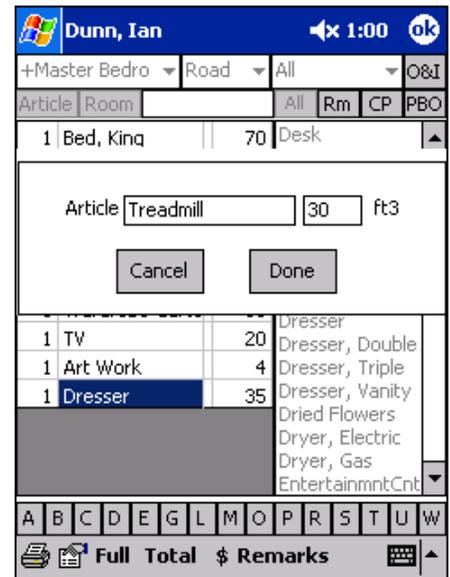
6.2.5 Adding Comments/Contents to Articles

Comments for articles, or Contents of a Carton can be added to all items in the survey. To add a comment to an article, tap/highlight the article on the Surveyed items list. Towards the top of the screen, beneath the “Mode” you will see an Empty box. When you tap in box the Inventory list will automatically change to the Comment List. You can select a comment from the list, or also type in a comment up to 16 characters in length. After you have attached a Comment to the article, the Quantity Number to the left of the article name will appear in a highlight Yellow color. To view the comments after they have been attached to the article, tap on “Full” towards the bottom of the screen. The Surveyed Items list will expand and you will be able to view your comments. To bring back the Inventory List, simply tap on “Edit.”

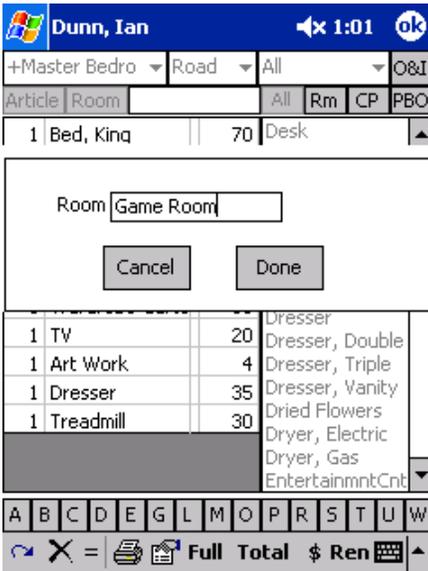


6.2.6 Creating Miscellaneous Rooms or Articles

To add a miscellaneous Room, tap on the “Room” tab beneath the Active Room list. This will bring up a screen to enter the room name. When you have entered your new room name, tap on “Done,” the miscellaneous room will then be added to the room list, and also set as the current room to survey into.

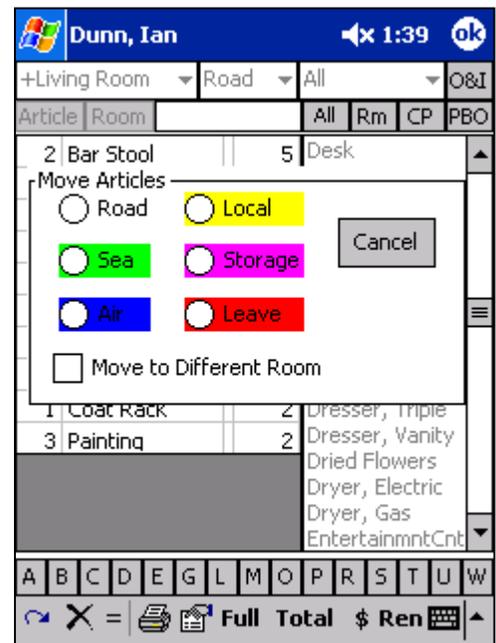


To add a miscellaneous article, tap on the “Article” tab beneath the Active Room list. This will bring up a screen to enter in the article description and size. When you have entered this information, tap on “Done.” The Miscellaneous article will be added to the current room being surveyed.



6.2.7 Entering Crates

Crates can be added to the survey through either the “All” or “CP” inventory lists. Tap Crate and the crate entry screen will pull up prompting you to enter the crate dimensions. Once you have entered in the dimensions, tap “Done” and your crate will be added to the current room being surveyed.



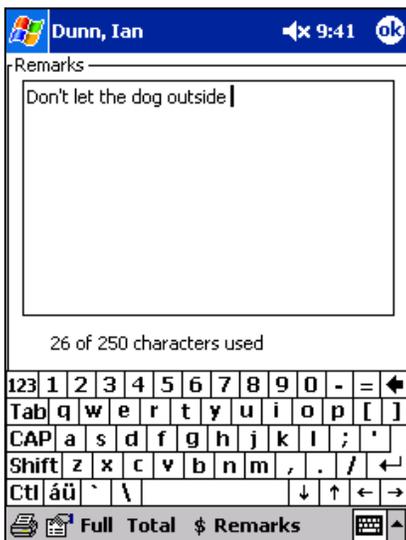
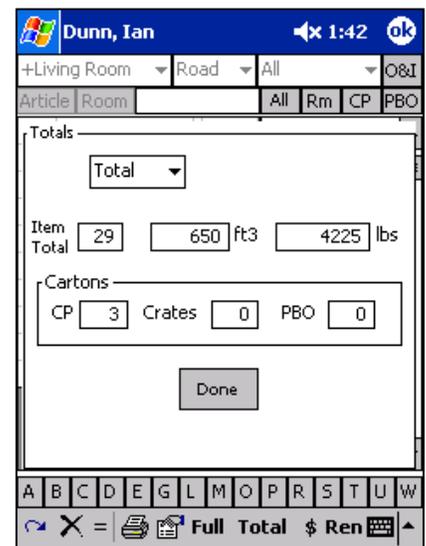
6.2.8 Moving Articles during Survey Process

Articles “Not Going” or going to Storage can be marked during the survey process. To label an article as “Not Going”, tap/highlight the article under the surveyed room list. Tap on the “Hook Arrow” in the bottom left corner of the screen. A “Move Articles” screen will appear and allow you to select the Mode for this particular article. When you select Leave, the article quantity will appear in Red. When the survey is printed, all articles “Not Going” will be listed in a separate section. Any articles going to Storage can be labeled using this same process.

To Move an article to a different room, tap/highlight the article under the surveyed room list, and then tap on the “Hook Arrow” and the “Move Articles” screen will appear. At the bottom of the window there is a box labeled “Move to Different Room.” Tap in the box and a drop down Room List will appear. Tap on the room that you would like to move that article to, and then tap “Done.” The article will be moved into the new room that was selected.

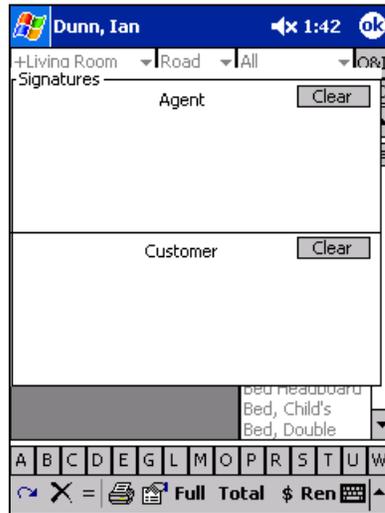
6.2.9 Display Totals of Surveyed Articles

After you have completed the Survey, and prior to going into the Rating Process, you can get the Totals on all articles Surveyed. To do this, tap on “Total” at the bottom of the Inventory screen. A window will appear and display the item count, the weight, as well as the CP, PBO and Crate count. Simply tap on done to return to the inventory screen



6.2.10 Adding Notes/Remarks

Notes can be added, and printed with the Survey Service Reports. To add a remark, tap on “Remarks” at the bottom of the Inventory Screen. The Remarks section is for free form notes so that any pertinent information about the customer is saved. All Remarks will be printed along with the Survey.

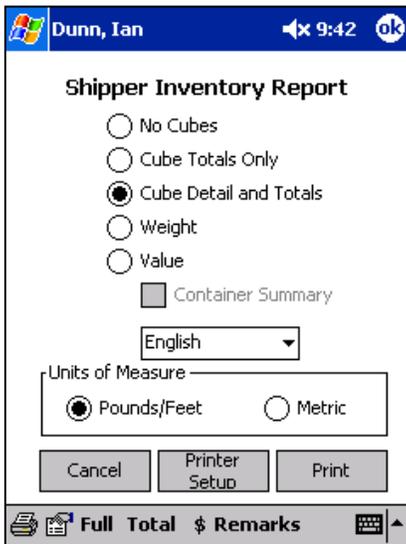


6.2.11 Obtaining Signatures

Customer/Agent

While in the Inventory Screen, by tapping on the icon of the “Hand and Paper” a window will appear and allow you to obtain both the Agent and Customer Signatures. A signature can be obtained on here using the stylist. Tap on the “OK” button and these signatures will appear on the printed inventory.

6.3 Printing Shipper Inventory Report



Once you have completed the survey, you can print out a variety of Shipper Inventory Reports. Tap on the Printer Icon near the bottom left corner of the inventory screen. An Inventory Report list will appear and allow you to select the type of report you wish to print. Both the printer and PDA are infrared; to use the printer, line up the two infrared ports. Lay them both flat on a table about 6-8 inches apart so that the two infrared ports are facing each other. When the printer is turned on with the paper loaded, and lined up to the PDA, tap on the “Print” button on your PDA. The PDA will display a screen reading, “establishing a connection,” once the connection has been made, the printer will start printing. Do not move the PDA until the printing is complete. (To change the paper size or printer driver- sees the Setup/Defaults section of the manual

7.0 Rating

You can begin the rating process in Pocket SalesMate one of two ways. While in the inventory section, simply tap on the “\$,” or while in the Shipper screen you can tap on “Rate” to begin rating.

7.1 Tariff Selection

Prior to rating the move, Pocket SalesMate will display a Rating Selections screen. This is where you will select a Tariff, set the Bind Date, and select the Modes to include in the rating.

To select the Tariff, tap on the drop down arrow next to the Tariff field. Only initialized Tariffs are available for selection. If a desired Tariff is not listed in the drop down list, go to Setup-Tariffs and initialize the Tariff(s).

The screenshot shows the 'Rating Selections' screen. At the top, the user's name 'Dunn, Ian' and the time '1:30' are displayed. Below this, there is a 'Tariff' dropdown menu with a question mark icon, and a 'Bind Date' field containing '4/15/04'. The screen is divided into two columns. The left column contains the text 'All Locations will be used during Rating.' and 'Extra Stops are obtained from Locations.' Below this, the origin and destination are listed: 'Orig-Laguna Hills CA 92653' and 'Dest-Chicago IL 60680'. The right column is titled 'Select Groups to include in Rating' and contains several checkboxes: 'Road' (checked), 'Local', 'Sea', 'Air', and 'Storage'. At the bottom of the right column, there is a 'Use Survey' checkbox which is also checked. An 'Exit Rating' button is located at the bottom center of the screen. A question mark icon is visible in the bottom left corner of the screen.

7.1.1 Rating – Bind Date

In Pocket SalesMate, when you pick a Tariff (e.g. 400N), the Bind Date is used to determine the rates that are effective on that date during Rating. The Bind Date will default to today's date, but can be changed at the Rating Selections screen (note that is a change from the way SalesMate/Telxon worked).

7.1.2 Rating – use of Modes

Pocket SalesMate allows you to use specified groupings in the survey during rating. For example if you have an long distance move and a portion being moved locally, you could enter articles for the long distance move in the "Road" mode and then enter the articles being moved locally in the "Local" mode. Then select only the "Road" mode articles to be used during rating with the interstate tariff.

Again, you need to select the modes that you wish to include in the rating (i.e. Road, Local, Storage, etc.). Simply tap in the box next to the group's name to include that group in the Rating. Note that there is no assumed relationship between the "Local" mode and the "Local" tariff.

At the bottom of the tariff selection window there is a check box "Use Survey". The first time a tariff is rated, "Use Survey" will be checked and no modes will be selected. You need to select the modes that you wish to include in the rating (i.e. Road, Local, Storage, etc.). Simply tap in the box next to the group's name to include that group in the Rating. Note that there is no assumed relationship between the "Local" mode and the "Local" tariff.

After the initial rating "Use Survey" will not be checked. If you want the Survey to be re-rated, check "Use Survey". Note that is you re-rate the survey, all weights and container counts will be set from the Survey. Unless you have made changes to the Inventory, you will not want to check "Use Survey".

7.1.3 Rating - Continue or Exit

After you have made all of your Rating Selections, tap on the "OK" button in the top right corner to begin rating.

There is an Exit Rating command button on the screen. If you do not wish to continue with Rating, tap on Exit Rating.

7.1.4 Rating – Delete

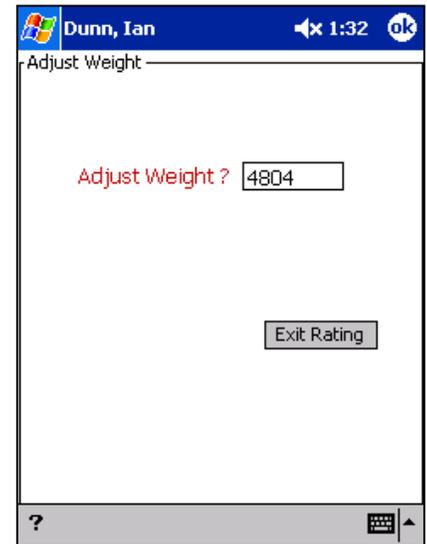
To delete the Rating, Tap on the "X" at the bottom left corner of the screen and then confirm deletion of this rating.

7.2 Rating – Adjustments (e.g. Weight)

After you have made all of your Rating Selections, you will be prompting with an “Adjust Weight” screen. This will display the total weight that the survey came out to, however, you have the option to make any desired adjustments at this screen. When the weight is set, tap on the “OK” to proceed with the Rating.

If an interstate tariff is being used that does not have miles determined by zip codes or schedules determined by zip codes, they need to be entered at this display. Origin schedules can be set as defaults at this point.

Tap on “OK” to continue with rating or “Exit Rating” if you do not want to continue with rating at this time.



7.3 Main Rating Screen

Following is an example of the Main Rating Screen:

All Tariffs in Pocket SalesMate have a similar look and feel. Applicable items of the Tariff, Bind Date, Miles, Season (Peak or Non- Peak), and Weight are displayed at the top of the screen. If the tariff you are using gets miles from the Rand McNally Mileage guide, the Miles field will be displayed as “xxx,” as Rand McNally contractually limits us from showing the miles.

Tariff	BindDate	Miles	Weight
400N	4/15/04	xxxx	4849
<input type="checkbox"/> OT Load <input type="checkbox"/> Climate <input type="checkbox"/> OT Unload			
+ Transportation			3308.46
+ Basic Valuation			0.00
+ Custom Pack - No Unpacking			162.38
+ Extra Stops / Mini Stq.			0.00
+ Storage Charges			1041.34
+ Miscellaneous Services			0.00
+ Extra Labor / Shuttle			0.00
+ Bulky Articles			60.18
Disc 62.000%			
Non-Binding			
			\$4572.36

For some Tariffs, applicable options (i.e. Overtime Loading, Climate Control, etc.) are shown as check boxes on the second line of the main rating screen.

Bill Items for the Tariff are shown in a grid and are combined into groups (i.e. Transportation, Valuation, Packing & Unpacking, etc.) and displayed in a grid. The groupings are similar to the way they are printed on the Estimate/Order for Service report. The subtotal for each Group is initially displayed (there will be a “+” shown in the left most column). If you click on the group’s “+”, all items in that group will be displayed and the group’s name will be displayed just above the grid with a “-“ shown in Red to the left of the name. Tap on the “-“ to return to the display of the groups.

When a group is expanded to show all items, you can tap on an Item to open a window that will allow you to make changes. Once desired changes have been made, the “OK” button will return you to the display of the Tariff items.

The Discount choices, Contract Type, and the total estimated cost are shown at the bottom of the screen. If you are using the TPG tariff or using a Bottom Line Discount, the total can be changed and either the SMF or discount will be adjusted accordingly.

To select a discount, tap on the “Disc 0.00” space at the bottom left of the screen. The discount options window will then appear at the top and allow you select a discount option and amount. When entering a discount, it is not necessary to enter in decimal places (for example- if you wish to select a 62% discount, simply type in 62) Once all discount selections have been entered, tap “OK” to apply the desired discount.

7.4 Transportation Charges

All Inter State Tariffs have Rates that are based on the Miles and the Weight of the shipment. If you are using a Tariff that uses Rand McNally miles, the miles will be determined from Zip codes. If the miles field is not displayed as “xxxx,” you will have to enter or adjust the miles.

The weight will initially be determined from the Survey. The Weight can be adjusted at any time to whatever you desire (of course, subject to Tariff minimums). To adjust the weight, simply tap on the weight field at the top right corner and make any desired changes.

7.4.1 Local Transportation & Labor Charges

The Local, Intra State, and International Tariffs all have charges involving the selection of the number of Vans and Men. For these to work it is necessary to enter both a 1 Van and 2 Man Rate and then an Extra Man Rate in Setup.

When you click on a Van & Men item, you then can enter the number of hours, the number of vans, and the number of men. The resulting rate and total will then be calculated. In all cases, you can change the rate.

7.4.2 Valuation Charges

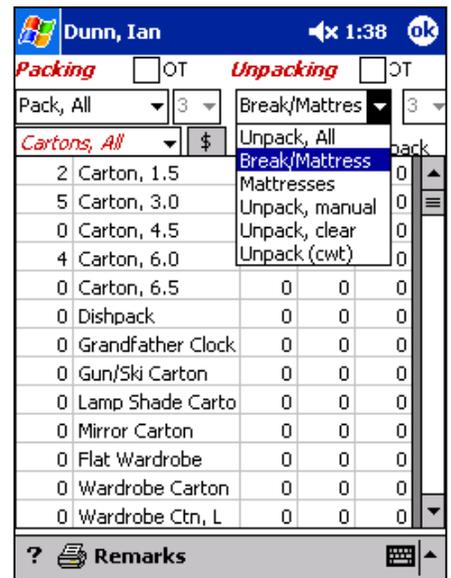
Valuation choices are made by taping on the Valuation line item. A drop down list of Valuation choices will appear at the top of the screen. If depreciated or replacement valuation is selected, the minimum valuation will be calculated and displayed. A text box will be provided to allow you to enter another valuation amount.

The resulting Valuation Charge will be displayed on the Valuation Subtotal line.

7.4.3 Packing Charges

For all Tariffs, you have the option of using Container and Packing rates separately or combining them into a Single Pack Rate (the default for the 400N Tariff is a Single Pack Rate). If you are using a Single Pack Rate, the Packing Window will have two combo boxes (Packing and Unpacking) to allow you to rapidly change your choices. If you use separate rates for Containers and Packing, there will be a third combo box for Carton charges.

After rating the Survey, the column on the left will be the number of Carrier Packed Containers entered in the Survey. You can decouple from the Survey and adjust the quantities in the left hand Qty. column. In this case, you can change the quantities by using the left most column. To adjust the Packing and Unpacking quantities manually, leave the Packing and Unpacking sections in the “Manual” mode. In this case, the left column will not be used and you will need to set all quantities manually. If you use the other selections (e.g. Unpack, Breakables & Mattresses), the quantities will be set automatically from the left column. By using the automatic settings, you can quickly get the estimated cost for the “what if” questions on pertaining to Packing costs.



The following example shows the selections of Packing, All (this is Unit Packing) and Unpacking, Break/Mattresses. The Quantities for Packing and Unpacking have been automatically set from the Qty column to the left of the Containers name.

7.4.4 Extra Stops/ Mini Storage Charges

Extra Stops & Mini Storage costs can be calculated by taping on the Extra Stops/Mini Stg. line item. To apply these charges, simply tap on the item within this section. When the window of that line item opens, fill out the desired quantity and place a check in the box at the top left corner.

For all Extra Pickups/Deliveries, please be advised that an Extra Pickup/Delivery location must be entered at the Shipper Screen for associated costs to be calculated. (See Creating a Customer section of manual)

7.4.5 Storage Charges

In order to make choices for SIT simpler, all choices relative to SIT can be shown in a single window. Simply tap on the Storage Charges line item. The Cartage window will open, in which you can set the number of days of Storage, the Cartage Miles, and also the Location of Storage. If desired, you can also make adjustments to the weight. Place a check in the Cartage box and tap on the “OK” button to apply storage charges.

7.4.6 Other Storage Charges

Additional Storage Charges within the Local and Intra Tariffs (such as Overflow Storage, Storage Valuation, etc.) can be made by tapping on the “+” next to the Storage Charges line item.

7.4.7 Miscellaneous Services

Charges for Miscellaneous Services (i.e. third party packing service), can be added by tapping on the Miscellaneous Service line item. Select either Origin or Destination, and enter in the charge that applies. Tap on “OK” to apply the charges.

7.4.8 Extra Labor/Shuttle

Charges for Extra Labor and Shuttles can be added within the Extra Labor/Shuttle line item.

To add in a Shuttle Charge, tap on either the Shuttle at Origin or Destination line item. A Shuttle window will appear in which you can fill in the Shuttle miles, and also adjust the weight. To apply the Shuttle charges, place a check in the box next to Shuttle (top left corner.)

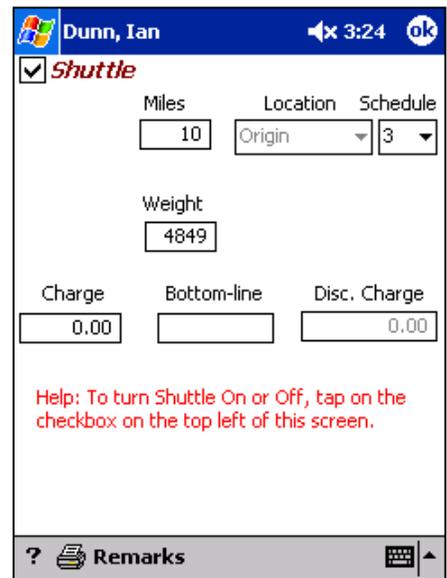
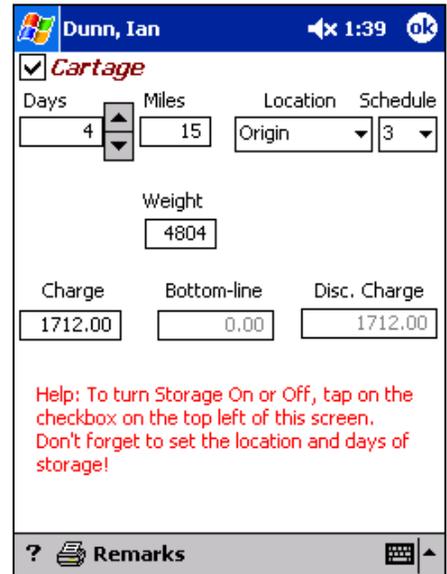
The Extra Labor section is divided into 4 line items. The first two are for Extra Labor and Extra Labor Overtime at Origin, the second half are for Extra Labor rates at Destination. To apply Extra Labor charges, tap on the line item of the Extra Labor charge that pertains to the move and enter in the total hours. Tap the “OK” to return to the main Rating screen.

7.4.9 Bulky Article Charges

In most tariffs, (400N and TPG) Bulky Article Charges will be calculated automatically according to the items within the survey. Within the setup of the Intra State Tariffs, you can set a Bulky Article charge, however you also have the ability to adjust this price during the rating process. Tap on the “+” to the left of the Bulky Article line item. Then select a Bulky Article line item, enter in the desired amount. Simply tap on the “OK” to apply these charges.

Appliance Servicing Charges

Some Tariffs will include an Appliance Servicing line item. To utilize these charges, tap on the line item. There are four options within this section. The first two pertain to Primary and Additional Appliance



Servicing at Origin, and the second two pertain to servicing at Destination. To turn on these charges, tap on the line item of the servicing that applies to the particular mover. In this screen you may enter the quantity, and also adjust the rate. When both the quantity and rate are at the desired amount, place a check in the box at the top left corner; tap the “OK” to return to the main rating screen.

Elevator, Stairs & Long Carries Charges

Within some Tariffs, a line item for Elevator, Stairs and Long Carry Charges will be included. To apply any of these charges, tap on the Elevator/Stairs/Long Carries line item. Tap on the line item of the charge that you wish to apply. At this screen, you have the ability to enter the quantity, as well as adjust both the weight and rate. When all fields have been filled in, tap on the “OK” to apply the charges.

7.5 Discounting

Discount choices can be found and entered by tapping on the “Disc.” Box in the bottom left corner. A Discount Window will appear towards the top of the screen. In this window, you can select the discount type and amount. It is not necessary to use decimals when entered the discount amount (i.e. if you are selecting a 62% discount, simply remove the 0.00 and type in 62) Tap the “OK” to apply the discount.

Charge	Amount
+ Transportation	8698.44
+ Basic Valuation	0.00
+ Custom Pack - No Unpacking	238.46
+ Extra Stops / Mini Stq.	0.00
+ Storage Charges	2732.24
+ Miscellaneous Services	0.00
+ Extra Labor / Shuttle	0.00
+ Bulky Articles	158.36

7.6 Contract Type

Contract Type options are shown at the bottom of the Rating Screen to the right of the Discount. If you are using either the TPG Tariff or a Bottom Line Discount, the total can be changed and either the SMF or discount will be adjusted accordingly.

7.7 Total Charges

The Total Charge, after all Rating Fields and Discounts have been adjusted, will be displayed at the bottom right corner of the Rating Screen.

7.8 Printing Estimate Order for Service

When you have completed the rating process, you are ready to print the Estimate Order for Service. Tap on the Printer Icon near the bottom left corner of the Rating Screen. A screen will appear and allow you to select the type of Estimate you would like to print (Detailed, Subtotals, Worksheet, et.) When you have made a selection, line up the infrared port on your PDA with the infrared port on your printer. Lay the two of them flat on a table, approx. 6-8 inches apart, just make certain that the two infrared ports are lined up. Once your printer is turned on with paper inserted, tap the “Print” button on your PDA. Your PDA will begin establishing a connection with the printer, and the printing process will begin.

When you have completed Rating and Printing the Estimate, you can exit out of the Rating Screen by tapping “OK” This will bring you back to the

Shipper Information Screen, by tapping “OK” you will return to the main Customer Screen.

8.0 Interface with FirstMate

One of Pocket SalesMate’s primary features is that it allows you to create and send customer information between Pocket SalesMate and FirstMate, and back again.

A connection must be setup with FirstMate (5.1 Setting Up a Connection with FirstMate) in order to upload or download a customer between FirstMate and Pocket SalesMate.

8.1 Sending Customers to FirstMate

To upload a customer from Pocket SalesMate into FirstMate, tap in the sync (2nd column from the right, left of the “X”) column in the customer display list on the main form of Pocket SalesMate. Click yes on the prompt to “Build File for Export?” The Sync status column in the customer display will turn yellow to show the customer file pending. Sync the Pocket PC and start FirstMate. It could take up to a minute for FirstMate to retrieve and process the file. Once FirstMate has processed the customer file, a confirmation will be sent back to Pocket SalesMate and the sync status column in the customer display will turn green.

8.2 Sending Customers to Pocket SalesMate

Primary Customer information can be created in FirstMate and downloaded to Pocket SalesMate. To do this, open FirstMate on your Desktop computer. Click on the Yellow Folder icon to create a new customer. At this screen, you can enter the Customer’s Primary Information, as well as assign a Carrier and Agent. You will also want to assign the order to the Salesperson who’s PDA this file will be downloaded to. When all of the desired information is entered, click on the Yellow Disk icon to save the Customer information. Right click to highlight the customer in the FirstMate Customer list and click on the “Pocket PC” button. The customer file will now be built and ready to export to Pocket SalesMate. Once Pocket SalesMate is synced, it could take up to 30 seconds for the file to download. Once the process is complete, the file will appear in the Pocket SalesMate customer list.