

# Essential Contax **PRO**

Mobile Contact Management for Business



Essential Contax Professional simplifies contact information management and lookups and increases your productivity by combining an advanced, intuitive and easy to use user interface with powerful contact search, listing and viewing modes.

The program also includes advanced appointment and task creation features that increase your scheduling effectiveness.

Essential Contax Professional uses the Pocket PC integrated Pocket Outlook contact/appointment/task database that seamlessly integrates with Microsoft Outlook.

## ***Installation Instructions***

1. Soft-reset your Pocket PC
2. Connect your device to your computer (or cradle) and establish an Activesync connection
3. Un-zip the downloaded installation package file
4. Run the EXE setup file to start the installation process. Install the program in the default location (main memory).

## ***Usage Tips***

### **Essential ContaX PRO can take a few seconds to load:**

If you have a lot of contacts on your device, the program will take a few seconds to load. To run the program simply tap on its icon once and wait until it is loaded.

### **Configure your Pocket PC's contact hardware button to open Essential Contax PRO:**

Go to Start/Settings/Buttons, choose the "Contacts" button to assign it to and select Essential Contax PRO from the pull-down menu. Now when you press the contact button on the Pocket PC, Essential Contax Pro will be run.

### **Run Essential Contax Pro only once:**

Minimize the program by tapping on the X button at the top right in the application or by selecting another program from the Start menu. When you wish to go back to Essential Contax Pro, just tap on its icon again.

## Quick Start Guide

### Essential Contax PROFESSIONAL 3.5

Quick Start Guide

Increase your productivity with your Pocket PC

**POCKETX**  
Software

**List contacts by:**  
Name (File As)

**List contacts by:**  
Company >> Name

**List contacts by:**  
Country >> Name or,  
Country >> Company >> Name

**Toggle info:**  
Title  
Department

**Toggle info:**  
Work Phone  
Work Phone 2

**Toggle info:**  
Cell Phone  
Pager

**Toggle info:**  
Work Address  
Office Location  
Other Address

**Toggle info:**  
Email  
Email 2  
Email 3

**Note Editor**

**First Level Sort List**  
(companies or countries)

**Second Level Sort List**  
(contact names)

**Font Size**  
Click on any field to increase/decrease font size

**Dial the phone number**  
(requires a Pocket PC Phone)

**Expanded Address View**

Tap to send Email to selected contact

Tap to view contact's webpage in Pocket Internet Explorer

**Contact Memory**

**Categories**

**Create a new contact OR Duplicate a contact**

**Add a new task**  
with the contact name in the subject line and contact's info in the note field

**Schedule an appointment**  
with the contact's name in the subject line and contact's info in the note field

**Switch between Business and Home information views**

**Essential Contax P** 11:50

Name	Company	Country	< list by
Pocketx Software			
Green, Lisa			

**Full Name** Lisa Green

**Company** Pocketx Software

**Title** ☐ Customer Support

**Work Phone** ☐ (123) 456-7890

**Cell Phone** ☐ (321) 987-6543

**Work Fax** (123) 456-9876

**Assistant Phone**

**Work Address** ☐ 11 Corporate Drive, Boston, MA 02132, United States

**Email** ☐ lisa@pocketx.net

**Webpage** http://www.pocketx.net

**New** **+Task** **+Appt** **C** **Business** **Home**

**Program Contact Tools Recent**

## Overview of Features

**Very powerful contact listing and sorting modes increase your productivity!**

You can list contacts by:



- **NEW! Any field in the contact database (eg. City, State, ZIP)**
- **Name**
- **Company >> By Name**
- **Country >> By Name**
- **Country+ >> By Company >> By Name**

Includes the **Country+ 3-level** contact list mode and **Expert Mode** that lets you list contacts by any field in the contact database (eg. ZIP code).



**NEW! Ability to send group email from your Pocket PC**

Easily create email distribution lists and send emails to multiple people with your Pocket PC



**Advanced user interface developed to increase your productivity**

The program intelligently groups contact information and enables quick lookup of related data



**Organize your contacts by assigning categories and utilizing them**

The best way to organize contacts on the Pocket PC is to use contact categories. Essential Contax Professional aids you in separating contacts by categories with its category filter no matter which listing mode you're in



**Easily edit your existing contacts, add new contacts and delete unwanted contact entries**



**Search for a contact by inputting known characters of the contact's Name, Company or Country**



**Automatically send email to a selected contact with just one tap on the email icon**

The selected contact's email address is automatically transferred into the Pocket PC's Email program. All you have to do is type the email



**Advanced Task creation with just one click**

The selected contact's name is automatically entered in the subject line of the new task while the contact's phone number, email address and work/home addresses are inserted into the task's note field



**Advanced Appointment creation with just one click**

The selected contact's name is automatically entered in the subject line of the new appointment while the contact's phone number, email address and work/home addresses are inserted into the appointment's note field



**Easily view webpage of the selected contact with one tap on the internet icon**

The program automatically opens Pocket Internet Explorer and connects to the webpage of the contact. (\*requires an active internet connection)



**Duplicate contact information with ease**

When entering a new contact you can choose to duplicate an existing contact's information to speed up the information entry process



**Easy contact selection**

Essential Contax Pro displays multiple contacts of one Company or Country in a drop-down menu for easy contact selection and grouping



**Text too small?**

Increase or decrease the size of all text by clicking on any information field in the program



**Two intelligent contact information pages organize the way you look at contact data**

The BUSINESS page groups detailed business contact information and highlights the important items for fast viewing. The HOME page shows detailed personal contact information



**View contact database statistics:** Number of contacts, companies, countries and categories stored on your Pocket PC and in Outlook



**Advanced contact Note Editor**

Edit your contact notes easily with the advanced note editor. Automatically insert the current time and date when a new entry is made into the note field. Easily re-size the text if the font is too small



**Contact view Memory**

Essential Contax Pro remembers your eight most recently viewed contacts and lets you switch back to them with one click

**Beam contact information to another mobile device**

Easily send the selected contact's information to another Pocket PC or mobile phone via infrared transfer

**Easily CALL a contact on a Pocket PC Phone Edition device**

Just tap on the phone icon of the number you wish to call and Essential Contax Pro will automatically dial the number

**Customize the way you view contact information with the screen color picker**

The all new color picker lets you change colors used in the program to suit your needs. You can now view contact information in high contrast, customizing the color of all the elements on the screen.

**Developed with extensive customer feedback and support**

Intuitive and Easy to use with powerful features



**Compatibility:** Essential Contax Professional works on all **Pocket PC 2003**, Pocket PC 2000, Pocket PC 2002, Pocket PC Phone Edition and WinCE3.0 devices



**Data Integration:** Essential Contax Professional integrates with the Pocket Outlook contact database on the Pocket PC while seamlessly integrating with Microsoft Outlook on the PC

## Questions?

If you have questions about the program or would like to suggest a new feature, email us at **[support@pocketx.net](mailto:support@pocketx.net)**

**Thank you for your support and enjoy the best business contact manager for the Pocket PC.**

# Version History

## What's new in version 4.1

- Enhanced Windows Mobile 5 compatibility
- Performance improvements

## What was new in version 4.0

- **NEW Feature: EXPERT SORT** lets you sort and list contacts by any field in the contact database (example City, State, Postal Code, etc.)
- **NEW Feature: Group Email** lets you create email lists and easily send group emails to multiple people with your Pocket PC

## What's was in version 3.6

- **NEW Feature:** Contact information color picker lets you customize the way you view contact information

## What was new in version 3.5

- Pocket PC 2003 devices are now supported
- **NEW Feature:** Easily Dial a contact by tapping on a telephone icon (requires a Pocket PC Phone edition device)
- **NEW Feature:** Beam contact info to another mobile device via infrared
- Enhanced category filter and note editor
- Updated help pages
- Enhanced user interface

## What was new in version 3.4

- **NEW Feature:** Creating an appointment or task and associating it with a contact will now enter the work and home addresses (if available) of the contact in the task/appointment note field (in addition to telephone numbers and email).
- Performance improvements and minor bug fixes
- **NEW Feature:** Ability to apply categories when listing contacts in Company, Country and Country+ modes
- **NEW Feature:** Enhanced contact database statistics page now shows number of contacts, companies, countries and categories

## What was new in version 3.3

- **NEW Feature:** Country+ Contact List Mode. Pressing the Country button twice enables the extended "Country>>Company>>Name" list mode. In this mode, contacts are first listed by Country of Business Address, then by Company Name, and finally by Contact Name.

## What was new in version 3.2

- **NEW Feature:** New "+ Entry" feature in Contact Notes will automatically enter date and time of new text entry when note is edited.
- New program icon
- New category filter view