
Level 1 Customer Support

General Procedures and
Troubleshooting Guide



MobilePoint Corporation

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Appendix A

Glossary

Preface

This guide describes the operation of Level 1 support for MobilePoint products.

Getting Started

To use this manual, you need:

- a tablet computer running **e-case** and running the Clairol 2000 Custom Solution
- access to a desktop PC and an email tool to create support reports and share them with MobilePoint Technical Support

You need to know:

- how to use the pen interface of the tablet computer
- how to use the Clairol 2000 Custom Solution

In addition to this manual, you should have a copy of the end user guide for the Clairol 2000 Custom Solution.

Using This Manual

Chapter 1, “Level 1 Support” tells you how to log and escalate support calls, how to exchange hardware in the field, and how to check the hardware before sending it out.

Chapter 2, “e-case Operating Environment” describes the main features of the **e-case** environment.

Chapter 3, “e-case Troubleshooting Notes” tells you how to address problems related to the **e-case** environment, such as problems with notebook tabs or an address list.

Chapter 4, “Clairol 2000 Custom Solution Troubleshooting Notes” tells you how to address problems related to the Clairol 2000 Custom Solution customization, such as problems with the DCR or the STOF.

Appendix A, “Glossary” gives definitions of terms used in this manual.

The Level 1 customer support analyst's primary objective is to receive incoming calls and resolve problems associated with the tablet or application. When the analyst receives a call for support on the tablet or the application, he/she goes through a series of questions to get details relating to the particular problem.

Problems that exceed established service levels or scope of knowledge are escalated to MobilePoint Technical Support. At that time, the receiving MobilePoint support analyst takes ownership for resolution of the call.

The Level 1 support analyst is responsible for logging calls into a database and updating the status of the call as needed. All calls need to be logged in detail. Weekly call reports need to be maintained and sent electronically to the MobilePoint Technical Support manager.

Phone Support

Resources Required

Resources required for every 60 users who are being supported:

- One toll-free number that has two lines plus voice mail

If the first line is busy, the call automatically rolls to the second line. If no one answers, the call rolls into voicemail.

- Two Level 1 customer support analysts
 - Each analyst should have at least one fully operational tablet with all related accessories, with the same hardware and software configurations as the users who are being supported. This enables the analysts to better assist the end users by walking through the problem step by step with them. Having a spare unit on hand enhances the troubleshooting process.
- Spare hardware for field exchanges. See “Exchanging Hardware” on page 1-6.

Problem Analysis

This section outlines the procedure to follow to handle support calls. These steps are described in more detail in other sections as noted.

1. Determine the type of issue at hand and the severity.
See Chapter 3, “e-case Troubleshooting Notes”, and Chapter 4, “Clairol 2000 Custom Solution Troubleshooting Notes”.
2. Resolve the call, escalate to MobilePoint Technical Support, or report a change request.
 - Resolution ends the call.
 - If the Level 1 support analyst cannot resolve the call, escalate the call to MobilePoint Technical Support as described in “Escalating a Call” below.
 - If the cause of the problem is clearly a product defect (something that cannot be resolved either by Level 1 Support or by MobilePoint Technical Support), or if the user is requesting functionality or features that the product does not currently have, the Level 1 analyst must report the change request as described in “Logging a Change Request” on page 1-4.
3. Log the call as described in “Logging a Call” on page 1-3.

Escalating a Call

To escalate a call, communicate all relevant user information and problem issues to the MobilePoint analyst. At this point, the MobilePoint analyst takes ownership for resolution of the call.

Before you escalate a call to MobilePoint Technical Support, get the following information from the caller:

- User’s full name and ID

- Phone number where the user can be reached
- How long the user will be at that number (or best time to be reached)
- Software version number
- Presenting problem
- Steps the Level 1 analyst has already taken to try to alleviate the problem
- Current status of the problem

After the call has been escalated, log the call according to MobilePoint call reporting guidelines. See “Logging a Call” below.

If the MobilePoint analyst determines that the problem is with a hardware component other than a hard drive, the MobilePoint analyst will call the Level 1 analyst. The Level 1 analyst will then exchange the impaired hardware, as described in “Exchanging Hardware” on page 1-6.

Logging a Call

The Level 1 support analyst is responsible for logging calls into a database and updating the status of the call as needed. All calls need to be logged in detail. A sample call log is shown in FigureX.

To log a call:

- Give the call report a unique identifying number.
- Record your name and the date and time.
- Record the caller’s name and userID (a number or other identifier that is unique to each user).
- Record the caller’s phone number. Get this at the beginning of the call, even though you don’t know whether you will have to call the user back. Your call could be cut off.
- Provide a brief description of the problem. What happened that caused the user to call?
- Record the steps you take to resolve the problem.
- Record the amount of time it takes to resolve the problem.
- Record the status of the call: Resolved, Escalated, or In Progress.
- If you escalate the call, record the name of the analyst at MobilePoint Technical Support who assumed responsibility for the call, and record the date and time you escalated the call.

Weekly call reports, including all data previously mentioned, need to be maintained and sent electronically to the MobilePoint Technical Support manager.

Call Report	
Date/Time: _____	Escalated by: _____
Rep ID#: _____	Escalated to: _____
Phone #: _____	Support time: _____
Status: _____	
Problem: _____	

Work Log: _____	

Figure 1-1: Sample Call Report Form

Logging a Change Request

If the cause of the problem is clearly a product defect, or if the user is requesting functionality or features that the product does not currently have, the Level 1 analyst must report the change request in addition to the regular call report.

A defect is something that cannot be resolved either by Level 1 Customer Support or by MobilePoint Technical Support. It is product behavior that is different from what the user expected, or functionality that the user perceives to be missing. Changing the product behavior or providing the new functionality requires additional engineering of the product.

To log a change request:

- Provide a title for the change request that is short and yet descriptive.
- Provide a brief description that clearly communicates the impact of the defect on the end user. Exactly what is happening that is unexpected or incorrect? Where is it happening? How does it affect your ability to work? What is not happening that you need? Why do you need it?

- Provide a detailed description of the defect that clearly isolates the problem. Exactly what steps did you take before you encountered this problem? What did you tap on? What values did you enter? What result did you expect? What result actually occurred?
- Summarize the change requested: Reiterate the result you wanted that you did not get.
- Describe the end user's configuration: version of **e-case**, version of SalesPoint solution, type of hard drive or flash disk being used, amount of disk space, amount of free disk space, amount of memory. Most of this should be available from records kept of equipment and software that was delivered to the user.
- Supply all call history (call report numbers) relevant to this change request.

When the change request is received by MobilePoint Technical Support, it is assigned both a priority and a severity level. When the change request has been characterized in greater detail, the Level 1 analyst who submitted the change request will be notified regarding what future release of the product the change will appear in. If the change requested is for a show-stopping defect (the end user cannot do his/her job), the problem will receive focused attention until a fix (an interim product release) or a reasonable workaround is delivered.

Change Request	
Title: _____	
Date: _____	Submitter: _____
e-case version: _____	Requested by: _____
Clairol version: _____	Tablet: _____
Memory: _____	Hard disk/Flash: _____
Disk space: _____	Modem: _____
Summary/Impact on User: _____	

Detailed Description/Steps to Replicate: _____	

Figure 1-2: Sample Change Request Form

Hardware

Exchanging Hardware

In some cases the resolution of the problem requires replacement of some of the end user's hardware. The Level 1 analyst should send out any equipment necessary to get the end user up and running as soon as possible.

A record must be maintained of all tablets, hard disks, modems, and other hardware, both in the field and in stock. This record must contain at least the serial number and current owner of each piece of equipment.

An inventory of spare units and components (a subset of the record of all hardware just described) must be kept readily available for emergency exchange. A listing of this inventory must be kept up-to-date and available to all at Level 1 Customer Support and at MobilePoint Technical Support. This listing must be reviewed on a regular basis to ensure that the correct specific parts and the correct quantities of replacements are kept on hand. As a guideline, the quantity of spare parts kept in inventory is recommended to be 8% to 10% of the number of end users.

Replacement equipment is shipped with a return shipping label and instructions for the end user to ship back the equipment that is being replaced. When the Level 1 analyst receives the equipment being replaced, he/she completes an RMA report and FAXes it to the manufacturer of that equipment. The manufacturer returns an RMA receipt, and that receipt must be included with the equipment when the equipment is sent for repair.

Hardware Supplies

This section lists the hardware currently used and the recommended vendors.

Fujitsu

- Stylistic 1000 (ST1000) tablet computer
 - Stylus
 - Hard drive
 - Battery charger
 - Battery pack
 - Auto adapter
 - Screen protector
 - Slip case

- Memory chips

MobilePlanet

- Apex modem
 - Apex cell cables
 - Landline cables

Prima International

- Flash disks

Hardware Checkout

Prior to releasing a tablet to the customer, the following steps must be taken:

1. Verify that the tablet has 24 MB of memory (displays when the tablet is booting, and also in the main BIOS window).
2. Set Date and Time (in the main BIOS window or in **e-case** Settings).
3. Verify that the modem and modem cable work (perform a test transmission).
4. Adjust BIOS settings:
 - a. Insert the drive as usual and turn the tablet on.
 - b. Soon after the Fujitsu logo displays, the following message displays: “For Pen Setup, Double Tap anywhere on the screen...” At that point, double tap (D) on the screen. The BIOS settings will display.
 - c. Find “Boot Options” in the first column and double tap on it. This displays the Boot Options page.
 - d. Tap in the field next to Boot Sequence until it displays “C: only”.
 - e. Tap Exit in the bottom left corner of the screen. This displays the previous Main screen.
 - Note that the change has been registered next to Boot Options.
 - f. Tap “Power Savings” in the menu bar.
 - g. Change settings as shown in Table 1-1 on page 1-8.
 - h. Tap Exit in the bottom left corner of the screen.
 - i. Tap the first line on the new screen that says “Save Changes & Exit”.
 - j. A “Notice” screen displays. Tap Continue. The tablet will reboot.

Table 1-1: Power Savings Settings

Power Savings	Customize
Hard Disk Timeout	30 seconds
Video Timeout	2 minutes
Auto Suspend Timeout	Off
Cpu Idle Mode	Enabled
Standby Timeout	Off
Suspend Button	Enabled
Suspend Mode	Suspend
CPU Speed	Fast
Resume on Modem Ring	Off
Resume on Time	On
Resume Time	00:00:00
HDD Head Retract	HDD Default

Supportable Cellular Phones

Note: If you have a digital cellular phone, have your cellular company change it to analog to allow transmission of data.

Below is a list of cellular phone models and cables currently supported by the Apex V.34 cellular modems:

Table 1-2: Supported Cellular Telephones and Cables

Cellular Telephone Model	Cable Part Number
AT&T 3610	921-40042
AT&T 3710, 3730	951-40042
AT&T 3760	961-40042
AT&T 3850	910-43842
AT&T 6650	910-43942
Diamondtel 18x, 20x, 22x, 25x series	971-40042
Ericsson AH-2xx, AH-3xx, DH-3x8, DF-3x8, DT-3xxx, PD-3xx	901-40042 — Use the newest revision of this cable.

Table 1-2: Supported Cellular Telephones and Cables (Continued)

Cellular Telephone Model	Cable Part Number
Ericsson AH-600, AF-700	STCLCBLAH6AF700
Fujitsu PCX	981-40042
Fujitsu Personna PCZ	910-44042
GE CT-500, CT-700, CT-800	901-40042
GE AH-600, AF-700	STCLCBLAH6AF700
Mitsubishi 3500, 4000, 4500, 5000	971-40042
Motorola Microtac, Microdigital Lite	991-40042
Motorola Lite II, Lite XL, Contour, Piper	
Motorola Elite	910-43542
Motorola 3 Watt Transceiver	STCLCBLMOT3W
Motorola StarTac	STCLCBLSTARTAC
NEC P110, P120, P180	921-40042
NEC P200, P201, P300, P301	931-40042
NEC P400, P401, P600, P601	941-40042
NEC P701, TalkTime 810, 820, 840	910-43642
NOKIA 232, 239H	910-43842
NOKIA 2120, 2160	910-43942
OKI 900, 910	951-40042
OKI 1145, 1150	961-40042
OKI 1325, 1335, 1375	910-43742
Panasonic EB-H65, EB-H66	STCLCLBEB-H65/66
Pioneer 700, 800	991-40042
Radio Shack CT-352, CT-355	910-43842
Radio Shack 17-1085, 17-1058	991-40042
Sony CM-RX100	STCLCBLCM-RX100
Technophone 515	910-43842
Technophone TD815	910-43942

e-case Operating Environment

The **e-case** (electronic briefcase) environment is an operating environment that runs on top of the tablet's disk and windowing operating systems. The **e-case** environment supports special **gestures** that allow users to work very quickly without a keyboard. It provides the capabilities to create special address lists and day and month planners within a **notebook** of interrelated documents. It provides its own capabilities for transferring information between the tablet and another computer or anywhere on the internet.

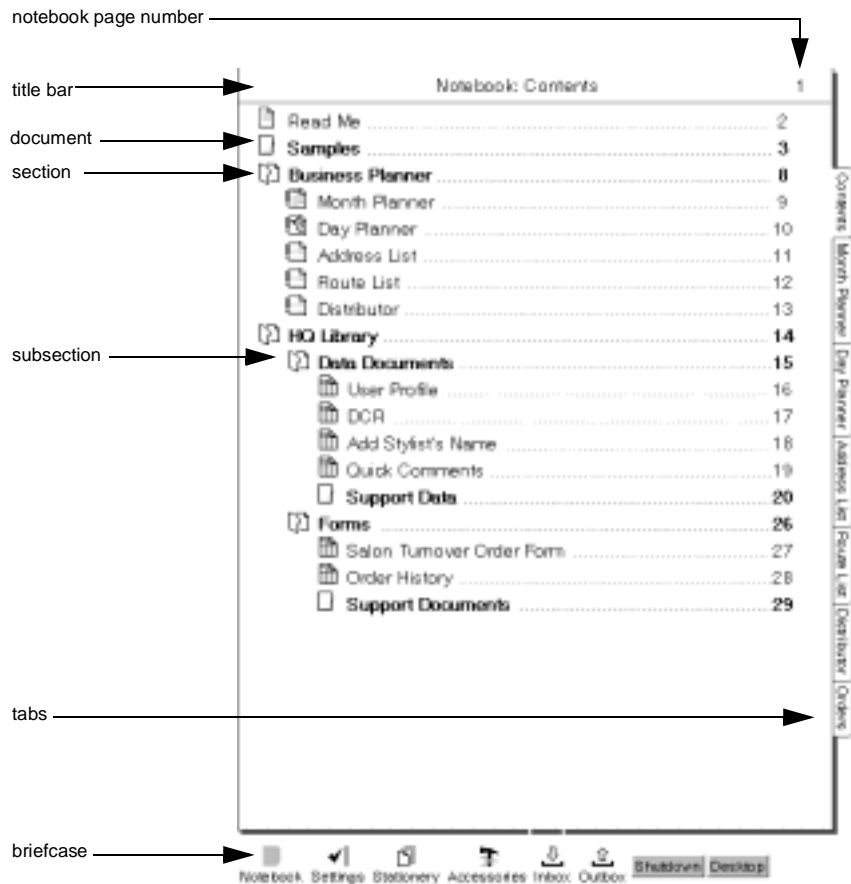
The **e-case** user interface presents as a background that covers all of your screen real estate and has its **briefcase** at the bottom of the screen. Your main notebook should be open on the rest of your screen. See Chapter A, "Glossary" for definitions of features and functions related to **e-case**.

Notebooks

An **e-case** notebook contains documents, organized as pages. When you first start **e-case**, your main notebook should be open to its contents page, which displays what is in your notebook.

- The Notebook: Contents page is similar to a table of contents in a book.
- The title bar of the notebook indicates the title of the page you are on.

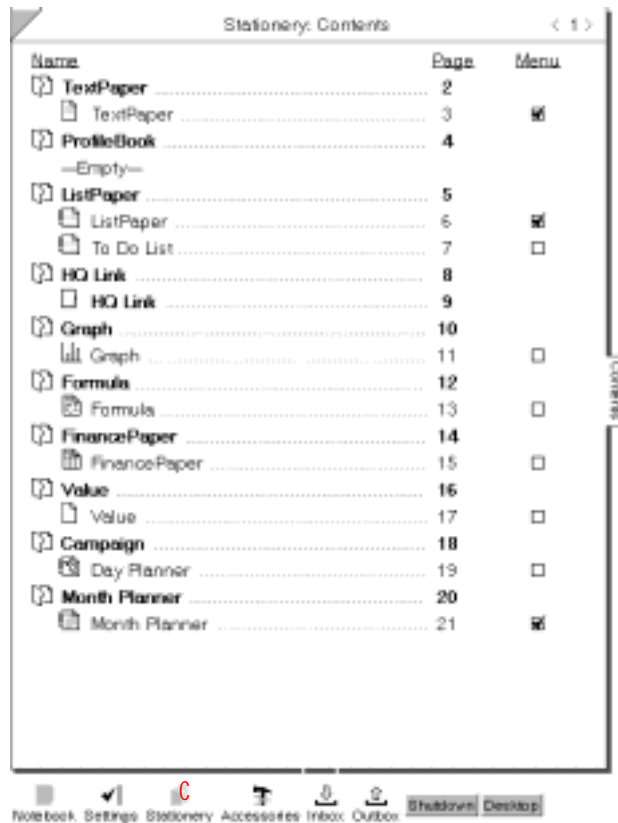
- The page number in the notebook title bar allows you to see what page of the notebook you are currently viewing. You can navigate through different pages of the notebook by flicking horizontally (**J** and **K**) in the notebook title bar.
- Notebook sections are shown in bold and contain documents.
- Notebook documents and sections are shown with different icons.
- Tabs appear along the right edge of the notebook and are used for quick access to commonly used documents in the notebook.



The Briefcase

At the bottom of the **e-case** screen is the briefcase, which contains icons for tasks such as setting preferences, practicing handwriting or gestures, and connecting to the internet or a printer. These icons are always available to you; you can access them while working with any notebook or document.

- The Settings notebook allows you to set preferences that apply to all the documents you work with in any notebook. For example, use Settings to set the time and date, align your stylus, and practice using gestures.
- Stationery allows you to create a new blank document or get a new copy of Day Planner or Month Planner. The Stationery notebook is shown below.
- Accessories allows you to view the underlying file system, as described in “The Connections Notebook” on page 2-4.
- Inbox allows your tablet to receive information from outside the tablet. The Inbox currently is not used.
- Outbox contains documents waiting to be printed or to be transmitted from the tablet. Currently neither option is supported.
- The Shutdown button prepares your tablet to be turned off.
- The Desktop button changes your tablet environment from **e-case** to the Windows 95 desktop.



The screenshot shows a window titled "Stationery: Contents" with a list of items and their corresponding page numbers. The list is as follows:

Name	Page	Menu
TextPaper	2	
TextPaper	3	
ProfileBook	4	
—Empty—		
ListPaper	5	
ListPaper	6	
To Do List	7	
HQ Link	8	
HQ Link	9	
Graph	10	
Graph	11	
Formula	12	
Formula	13	
FinancePaper	14	
FinancePaper	15	
Value	16	
Value	17	
Campaign	18	
Day Planner	19	
Month Planner	20	
Month Planner	21	

At the bottom of the screen, there is a navigation bar with icons for Notebook, Settings, Stationery, Accessories, Inbox, Outbox, Shutdown, and Desktop. The "Stationery" icon is highlighted with a red 'C'.

The Connections Notebook

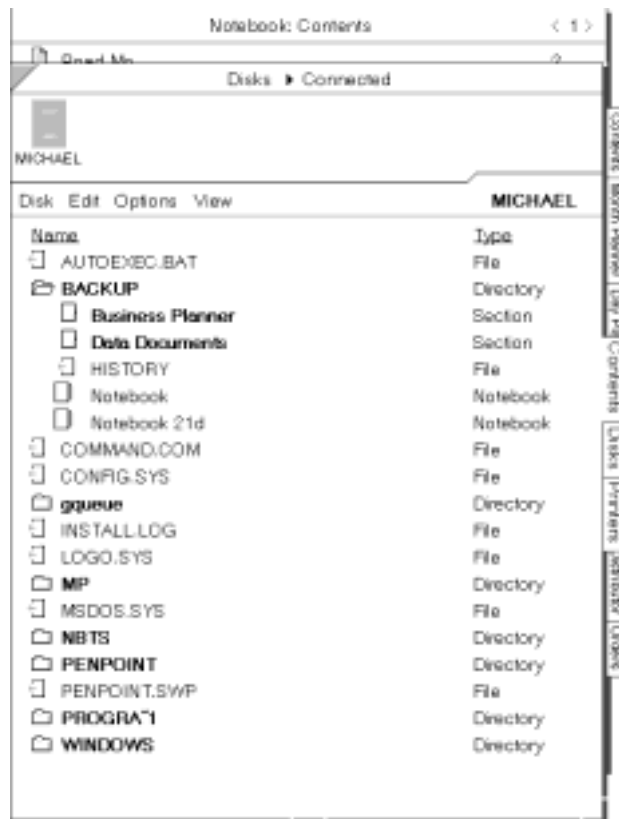
The Connections notebook provides a view of the DOS directory structure. You will use this most often to access the Backup directory.

To view the contents of the Backup directory:

- Tap on Accessories, and tap on Connections. The Connections notebook is displayed.
- By default, the Connections notebook opens to the Disks page. If you open to another page, just tap on the Disks tab of the Connections notebook.

- If the Disks page open to a view other than the Directory view, tap the View menu, and tap on “Directory” in the choice list. A checkmark appears to the left of the word “Directory”.

You should now see a view of the DOS directory structure of your hard disk. The BACKUP directory should be near the top. Double-tap on the word “BACKUP” to view the contents of that directory.



Buttons and Links

Many of the documents in e-case and in SalesPoint customizations contain buttons. A button is an object on the document, usually a rectangle with a label,

that automatically performs an action when you tap on it with your stylus. Typically the action performed is to open another document or turn to another page in the current document. For example, a button on an order form may open the customer address list, an order history document, or a promotional campaign document.

If you tap on a button and nothing happens or something unexpected happens, you have two places to look for the problem. Either:

- The button has become corrupted. Try replacing the document the button is on.

Or:

- The document the button is attempting to link to has become corrupted. Try replacing the document being linked to.

See Chapter 3, “e-case Troubleshooting Notes” and Chapter 4, “Clairol 2000 Custom Solution Troubleshooting Notes” for instructions on replacing or recovering various corrupted documents.

e-case Troubleshooting Notes

This chapter describes problems or issues that users could encounter with the **e-case** environment described in Chapter 2. These are independent of any problems or issues associated with any **SalesPoint** solution or other application that may be running in **e-case**. See Chapter 4, “Clairol 2000 Custom Solution Troubleshooting Notes” for issues specific to that customization.

Throughout this troubleshooting guide you will see instructions to perform either a “shutdown” or a “hard reset”. Shutdown and hard reset are both ways to turn off your tablet. The only time you should do a hard reset is when the tablet is not responding to the stylus at all.

To shut down the tablet correctly:

- Tap the Shutdown button in the Briefcase.
- Wait for the screen to go dark, and then when there is no hard drive activity, slide the power switch to the off position.

To perform a hard reset:

- Verify the tablet is hung (see “Hang — No Ink, No Hard Drive Activity” on page 3-2), and then slide the power switch to the off position.
- Wait two seconds, and then slide the power switch back on.

Hang — No Ink, No Hard Drive Activity

1. With the stylus, tap the brightness control hot pads.

If tapping the hot pads does not work, troubleshoot the stylus:

1. Change the stylus battery.
2. Change the stylus tip.

If the hot pads work, the stylus is not the problem:

1. Press the Standby button and wait 5 seconds.
2. If no action from Standby and still no hard drive activity, do a hard reset.

Tablet Exits to Windows



This is usually caused by a low battery, because the tablet is set to automatically shut down under low battery conditions.

1. Recharge the battery, or plug the tablet into the power adapter.
2. Double-tap the e-case icon on the Desktop.

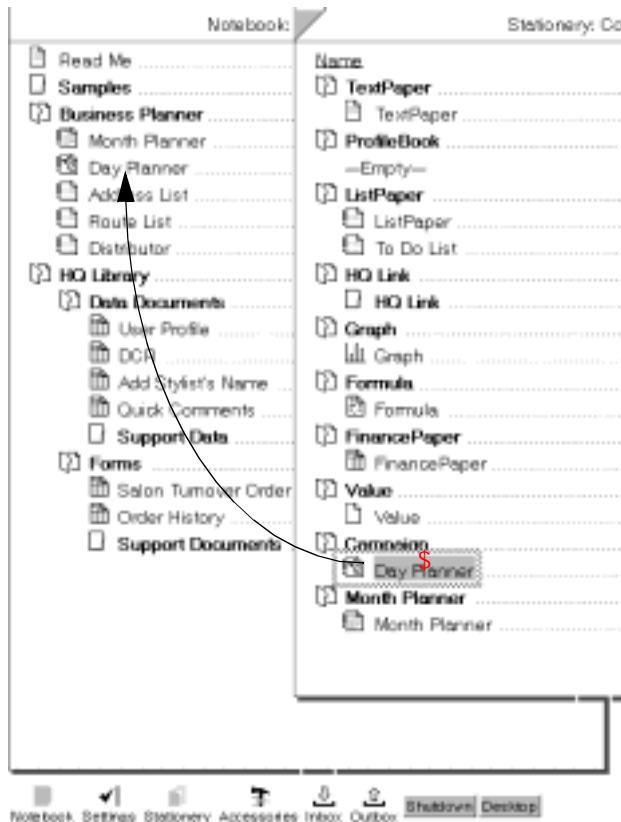
Corrupted or Missing Tabs

Note: If the Contents tab is missing, and you need to turn to the Notebook: Contents page, use the close gesture (?) in the title bar of the document you are in.

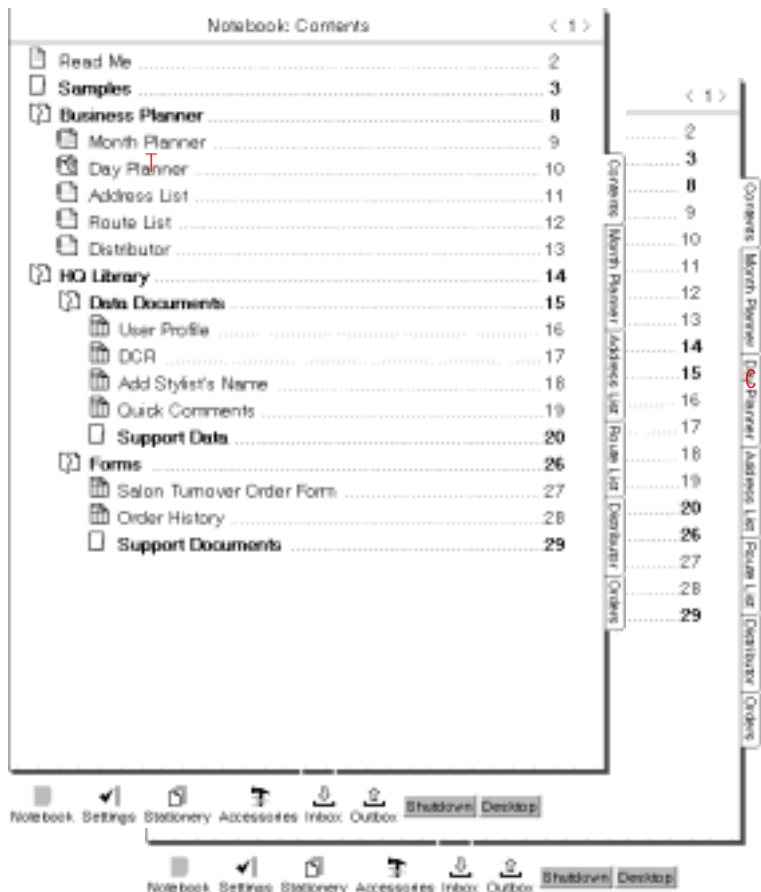
1. If tabs are corrupted, draw an & on the tabs to delete them.
2. Write a T on the document title in the Notebook: Contents page to restore each tab.
3. If the Contents tab is corrupt or missing, write a T in the title bar of the Notebook: Contents page.
4. Shutdown and restart.

Corrupted Day or Month Planner (44-1)

1. Tap the Stationery icon in the briefcase to open the Stationery Notebook.
2. Copy (tap-press **\$** and drag) the Day or Month Planner document from Stationery onto the Notebook Contents page, dropping the marquee directly on top of the corrupted Day Planner or Month Planner.
3. A message should display: “A document with the same name exists...” Tap Overwrite, then tap Copy.



4. Create a new tab: Write a **T** on the name “Day Planner” or “Month Planner”.
5. Tap on the tab to verify the document now opens, and then return to the Notebook: Contents page.
6. Shutdown and restart.



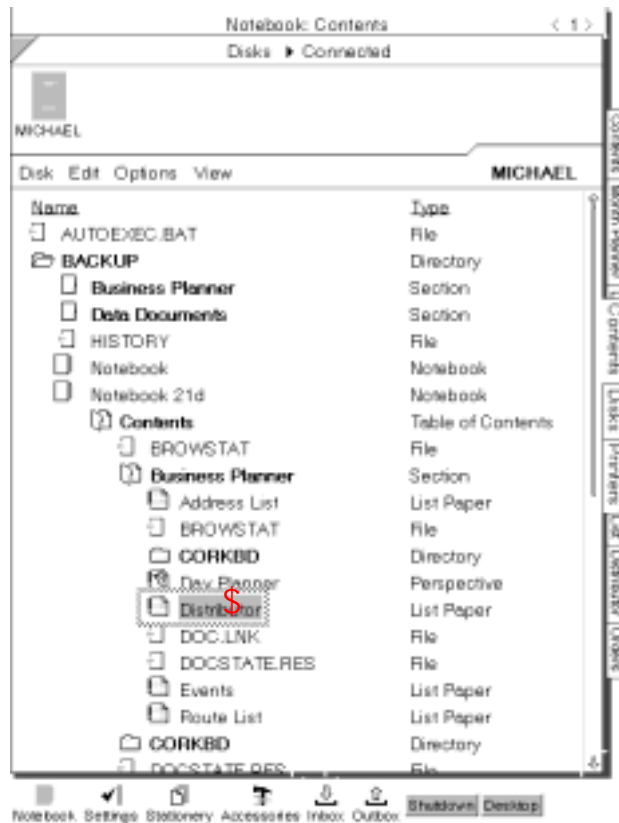
Corrupted Route, Address or Distributor List (44-1)

1. Shutdown and restart.

If shutdown does not fix the problem:

1. Overwrite the corrupted list with the list in the backup notebook.
 - a. Tap Accessories, tap Connections, and locate the backup directory.

- b. Look through the notebook in the backup directory until you find the replacement document.
- c. Copy the replacement document to the Notebook: Contents page.
- d. Overwrite the document you are replacing.



2. Re-create the tab.
3. Turn to the list to verify that it opens. Then return to the Notebook: Contents page.
4. Shutdown and restart.
5. Verify links to lists still link correctly.

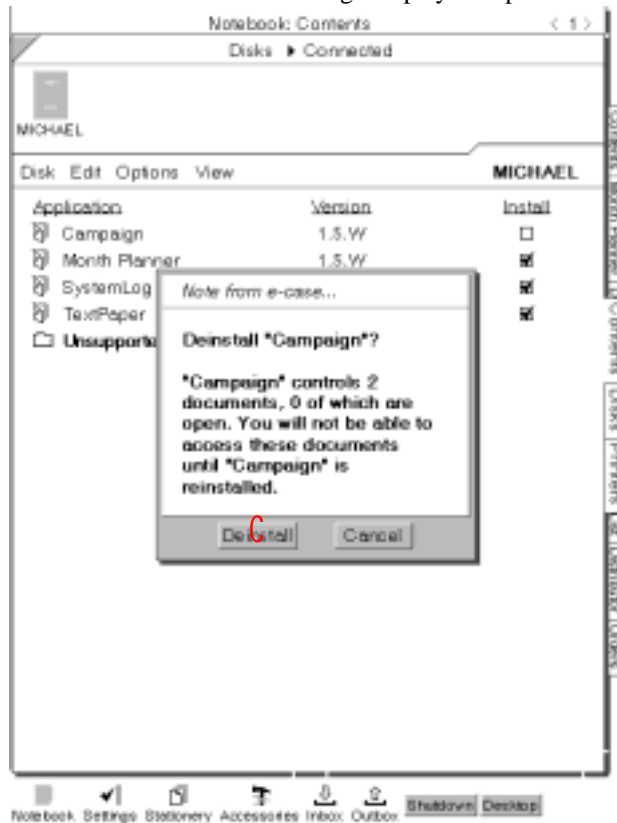
If copying a new list does not fix the problem:

1. Deinstall/reinstall Campaign.

- c. Tap on the checkmark in the box in the Install column.



- d. A confirmation message displays. Tap Deinstall.



- e. When completed, tap the blank checkbox to reinstall.
1. Shutdown and restart (see page 1).
 3. Tap on documents to verify that they open. If they do open, verify that the links to the documents still link appropriately.

Deleted Route, Address or Distributor List

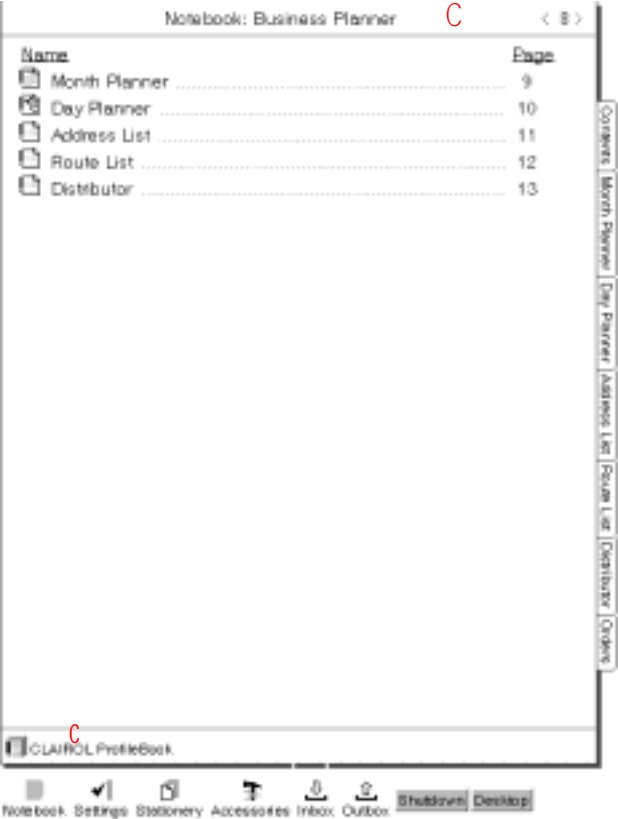
1. Copy the list from the backup notebook.
 - a. Tap Accessories, tap Connections, and locate the backup directory.

-
- b. Look through the notebook in the backup directory until you find the replacement list.
 - c. Copy the replacement list into the same section of the Notebook: Contents page where the other lists reside.
 2. Write a **T** on the document name to create a tab.
 3. Turn to the list to verify that it opens. Then return to the Notebook: Contents page.
 4. Shutdown and restart.
 5. Verify links to lists still link correctly.

Blank Lines in Address List

1. Turn to the Business Planner section:
 - On the Notebook: Contents page, tap on “Business Planner”. The notebook title bar should now say “Notebook: Business Planner”.
2. Write a **C** in the title bar to display the cork margin.

3. Tap on the ProfileBook in the cork margin.



4. Write an **R** to the right of the category name in the sub-title bar. A message displays: “Unused space is being reclaimed.”

The screenshot shows a web application titled "CLAIROL ProfileBook". The main header area displays "Distributor 13 of 1301" in bold black text, followed by a red letter "R". Below this, there are two small buttons labeled "Documents" and "Notes". The form contains the following fields:

- Store #: 1378
- Name: [empty]
- Contact: LISA KIREY
- Address: 1334 LIBERTY STREET
- City: SPRINGFIELD
- State: MA ZIP: 01104
- Business Phone: (413) 729-1361
- Fax: [empty]
- Short Name: [empty]
- General Links: [empty]
- Calendar Items: [empty]

At the bottom, there is a navigation bar with tabs: "Categories", "Calendar Items", "Appointment", and "Event". The "Categories" tab is currently selected.

5. Close the ProfileBook:
 - Make the close gesture (?) on the ProfileBook, beginning either in the subtitle bar or in the title bar.
6. Write a **C** in the title bar of the Business Planner section to hide the cork margin again.
7. Make the close gesture (?) on the Business Planner page. The Notebook: Contents page is displayed.

Scroll Margins Are Missing in Notes

1. Double-click up (L) in the Notes title bar (acts as a toggle).



Common e-case Error Codes

Table 3-1: Common e-case Error Codes

Error Code	Corrective Actions
1-2	Often occurs in combination with 44-1 (see below). Shutdown and restart. If a 44-1 error message persists, replace the document. If this is more than an isolated occurrence, escalate to MobilePoint Technical Support.
1-22	Usually occurs when attempting to deinstall an application. Shutdown and restart. If this is more than an isolated occurrence, escalate to MobilePoint Technical Support.
13-16	This error code displays briefly and closes a document, but the document can usually still be turned to on the next attempt, and the error code does not repeat. If turning away and back again does not fix this, shutdown and restart. This error is sometimes coupled with 44-1 (see below).
13-19	Corrupted notebook or auxiliary notebook. If it is the main notebook, replace it from the DOS backup. If it is an auxiliary notebook, escalate to MobilePoint Technical Support.
44-1	Cannot turn to document. Shutdown and restart. If the error message persists, replace the document. If this is more than an isolated occurrence, escalate to MobilePoint Technical Support.
44-2	Cannot float the document (the document itself is usually 44-1). Shutdown and restart. If the error message persists, replace the document. If this is more than an isolated occurrence, escalate to MobilePoint Technical Support.
62-27/62-26	Serious file structure corruption. Escalate immediately to MobilePoint Technical Support.
64-1	The modem is not being detected at the time of transmission. Reseat the modem.

Clairol 2000 Custom Solution Troubleshooting Notes

This chapter gives procedures for handling various problems that Clairol sales reps could encounter with Version 1.1 of the Clairol 2000 Custom Solution. It also gives various other how-to and other information about this version.

Corrupted STOF

1. Copy the FORMS section from the DOS backup notebook.
2. Re-create the tab.
3. Verify buttons linked to address/route list by taking a new order and then deleting that new order.
4. Shutdown and restart.

Corrupted DCR

A corrupted DCR can be regenerated from the order history. To recreate a DCR:

1. Copy the DCR from the DOS backup directory, flash disk, or DOS backup notebook — whichever is more recent.

2. Tap the DCR Options button and select the Start New DCR option.
 - A warning is given that the data will be erased from the DCR.
 - The user is prompted to enter the order number to start the DCR on. The default is the current number.
3. Do a hard reset.
4. Re-create the tab.
5. Shutdown and restart.

Corrupted Day Planner

1. Copy the Day Planner from Stationery.
2. Create a new tab.
3. Shutdown and restart.

Corrupted Product List

1. Open the Support Documents section on the Notebook: Contents page.
2. Copy the Product List from backup (overwrite).
3. Close the Support Documents section.
4. Do a hard reset.

Corrupted Notebook

1. Copy the corrupted notebook to backup, and rename it “Notebook - Bad”.
2. Copy the last good notebook from the flash disk or DOS directory.
3. Shutdown and restart.
4. If the STOF from the bad notebook is not corrupted and is more recent than the backed up notebook, copy forms and follow tech support instructions.
5. If the Business Planner from the bad notebook is not corrupted and is more recent than the backed up notebook, copy from backup.

Corrupted Route, Address or Distributor List

If more than one list is corrupted:

1. Deinstall/reinstall Campaign.
2. Do a hard reset.

If only one list is corrupted:

1. Delete the corrupted list from the Notebook: Contents page.
2. Copy the list from backup and create a new tab.
3. Shutdown and restart.
4. Turn to the STOF and verify links in the New Order, Salon, and Distributor buttons.

Deleted Route, Address or Distributor List

1. Copy the list from backup and create a new tab.
2. Turn to the new list, checkmark in the title bar to bring up Options / Access, and change “Deletable” to “No” (on all lists, if you have time).
3. Shutdown and restart.
4. Turn to the STOF and verify links in the New Order, Salon, and Distributor buttons.

To Delete Route Tabs

1. Turn to the Route List.
2. Checkmark in the title bar to bring up Options / Pages.
3. Toggle Paging from “On” to “Off” (APPLY) and then On again (APPLY & CLOSE).

Address List Options

Controls — Tab Margin

Items — Hand Pick List = No; Show = Customer

Pages — Paging = On; Using = Name; By = Alphabetic

Sort — First = Name (Ascending)

Title — Column Style = Gap; Expand Rows = No

Route List Options

Controls — Tab Margin, Cork Margin

Items — Hand Pick List = No; Show = Customer

Pages — Paging = On; Using = Route; By = Value

Sort — First = City; Second = Address; Third = Name (all Ascending)

Title — Column Style = Gap; Expand Rows = No

Distributor List Options

Controls — Tab Margin

Items — Hand Pick List = No; Show = Distributor

Pages — Paging = On; Using = City; By = First Letter

Sort — First = Zip (Ascending); Second = Name (Descending)

Title — Column Style = Gap; Expand Rows = No

Deleted Button(s) on STOF (from flash)

Note — Buttons should not be deletable!

-
1. Create a TextPaper document on the Notebook: Contents page, open it, and tap CANCEL (this removes the writing pad).
 2. Open a backup notebook on flash.
 3. Turn to the STOF.
 4. Copy the missing button(s) to the TextPaper document.
 5. Close the STOF and TextPaper documents, power off, remove the flash, and power on.
 6. Float the TextPaper document.
 7. Open the STOF.
 8. Move the button to the STOF.
 9. Do a hard reset.
 10. Do a regular shutdown and restart.
 11. Delete the TextPaper document.

Deleted Button(s) on STOF (from DOS)

Note — Buttons should not be deletable!

1. Copy the STOF from backup into the Samples section and open it.
2. Copy the missing button(s) to the briefcase.
3. Delete the STOF in samples.
4. Open the other STOF and move the button(s) into it.
5. Turn to the Notebook: Contents page.
6. Shutdown.
7. Do a hard reset.

Options Button Does Not Display Options Picklist

1. If the “Loading” box is displayed, tap on it to make it go away, and then try the Options button again.
2. If that doesn’t work, turn to the TOC and tap on Options in the Support Documents section to see if it displays. If a 44-1 message displays:
 - a. Copy the Options section from DOS backup and do a hard reset.

- b. Turn to the STOF. If a STOP sign displays at the bottom right, tap on it until it goes away.

NOTE — The reason to not copy the whole Forms sections is that we don't want to lose the rep's signatures. The rep can't print all forms out first because the print option is embedded in the Options button. (There is the print workaround — P in title bar — that's an option if necessary.)

Glossary

Address List — A standard e-case document that displays address and telephone information for people and companies.

arrowhead — A symbol that tells the user there are more options. When it is tapped, a choice list is displayed.

Associate — e-case's behind-the-scenes intelligent agent. It automatically creates links between people, appointments, to do's and other information. You can turn the Associate on or off.

auxiliary notebook — A notebook in the Briefcase such as Stationery that you use for specialized tasks while working with e-case.

backup — A duplicate copy of a document, notebook, or software application that you store on disk for safekeeping or for later use.

banner — An area below the menu bar in a document that indicates the current page in the document. For example, the day of the week in the Day Planner or letter in the alphabet in the Address Book.

booting — Restarting e-case following a shutdown.

briefcase — The container for your notebook, auxiliary notebooks, and accessories that you use for tasks such as copying a document to a disk and installing applications. Items in the Briefcase are represented by icons at the bottom of the screen.

busy clock — An animated clock symbol that appears when **e-case** is carrying out a command that takes any length of time. Do not tap or make other gestures on the screen while the busy clock is displayed.

button — An object that automatically executes a sequence of actions when you tap on it.

Cancel — A button that closes a sheet, an edit pad, or a note without changing anything.

choice list — A list of choices that appears when you tap on an arrowhead.

close corner — A shaded triangle in the upper left corner of a floating document, dialog sheet, or message sheet. Tap the close corner to close the document, sheet, or pad.

command — A gesture on a document, a button selection, a choice on a choice list, or a choice on a menu. Commands tell the **e-case** operating environment what to do next.

controls — The portions of the screen that you use to work with a document: its title bar, menu bar, scroll margin, resize handle, and cork margin. Using the Controls option sheet, you can display or hide these controls.

cork margin — An area at the bottom of a document. This area can contain anything that the main body of the document can contain such as buttons or embedded documents. Write a C in the title bar to show or hide the cork margin.

crash — An error that makes it not possible to use a document or an application.

Day Planner — A way to view DayPlanningPaper. See also Month Planner.

DayPlanningPaper — Stationery used to provide a daily or monthly view of the Notebook Database. With DayPlanningPaper the user can create appointments and prioritize task lists. DayPlanningPaper will automatically associate those lists with customer profiles.

deselect — The action you take, usually a tap, to make something that is currently selected no longer selected.

Desktop — The Windows 95 environment. When the Desktop button in the Briefcase is tapped, **e-case** exits and turns to this environment.

dialog box — A floating sheet that requires user input in order to complete a command.

diskgen — MobilePoint's process of installing e-case and custom solutions onto the hard drive that runs in the tablet.



document — A page displayed on the screen.

DOS directory — A container on disk that organizes non-e-case documents (files) and sub-directories. It can also contain e-case documents. DOS Directories are accessed through the Connections Notebook in the Accessories Briefcase item.

double marquee — Two moving dashed lines that surround a selection or object when it is ready to be copied.

drag — The action of moving the stylus across the screen without lifting it. It is used with move and copy commands or when selecting text.

e-case — The “electronic briefcase,” MobilePoint’s operating environment.

edit pad — A floating pad divided into boxes for text characters. You write a single character in each box and then translate the text while it is in boxes, before transferring it to the page. You open an edit pad by drawing an edit circle () gesture or sometimes an insert caret () gesture over the data.









error message — A note from e-case telling you that something has not worked. Some notes include instructions on how to correct the error.

field — The fill-in area on forms, dialog and option sheets, and lists. You can write text directly in a field or tap the field to open an edit pad.

FinancePaper — Stationery used for forms and worksheet calculations that includes typical spreadsheet functions.

find — A command used to locate information in any e-case document. Draw an F in the title bar to bring up the Find dialog sheet.

flash disk — A hard disk that can be inserted into either of the auxiliary slots of your tablet computer.

flick — A document navigation gesture: A quick, short line drawn with the stylus that causes your view of a document to move, or scroll, according to the direction of the flick. Flick left  to see more of the document to the right of where you are now looking, flick right  to see more of the document to the left, flick up  to see more of the document below where you are now looking, and flick down  to see more of the document above where you are now. Double-flick (left , right , up , or down ) to jump to the end of the document in that direction.

float — Placement of a document, dialog or option sheet, or Briefcase item on top of the current page.

gesture — A symbol or letter you draw on the computer screen with the stylus. Gestures bypass and supplement menu commands.

gesture margin — The vertical or horizontal line at the right side or bottom of the screen that tells you that part of the document is off the screen. You can view the rest of the document either by flicking or by tapping on the gesture margin.

hard disk — A high-capacity storage media. The hard disk is located in Slot 1 of your tablet.

hard reset — Slide the power switch off and then on again without tapping the Shutdown button first. *A hard reset is only used when the tablet is hung and the Shutdown button does not respond.*

HQ Library — A self-contained set of documents, scripted together in a section and checked in and out of the HQ server.

HQ Link — The communication protocol for transporting data from the tablet to the HQ Server.

HQ server — An NT server to which data is sent via HQ Link.

icon — A symbol, usually a small picture, that represents a document, an item in the Briefcase, or an embedded document.

ink — The markings you make with your stylus on the page.

link — A relationship between two objects; for example, between a name in an Address List and its profile.

ListPaper — Stationery used to show a view of all items in the Notebook Database meeting a given set of criteria that a user predetermines.

lock-up (hang, freeze) — The state in which the tablet does not take ink, and there is no hard drive activity. A hard reset is required to restart the tablet.

marquee — A moving dashed line that surrounds a selection that shows it is ready to be moved. When you see the marquee, you can drag the selection to a different location.

memory — The amount of space that your e-case computer has available for the tasks you're currently doing on the computer, such as floating a document, turning a page, and translating your writing. Memory is typically the total working space shown on the storage summary page of the settings notebook.

menu bar — A list of commands located at the top of the page below the title bar. You choose a command by tapping on it, then tapping on the desired action in the menu. Most menu bar commands have equivalent gestures. To remove or restore the menu bar on a document, write M on the title bar.

message box — A sheet on the screen that displays a message to the user but does not require user input.

modem — The device that allows you to send information away from your tablet (such as orders) and receive information on your tablet (such as updated order history or product catalogs). The modem is a PC card that looks similar to your hard disk, but the modem is thinner. Put the modem card into either of the auxiliary slots in your tablet, and use the modem cable to connect the modem to a standard telephone line.

modem cable (land line) — A cable that connects your modem card to a standard telephone line. The connector that looks like a standard telephone line connector connects to the telephone line, and the flat connector connects to the modem.

Month Planner — A way to view DayPlanningPaper. See also Day Planner.

notebook — The container, often referred to as the main notebook, that holds the documents you create. The first page of the notebook is the Notebook: Contents page (table of contents). Each succeeding page contains a different document. Auxiliary notebooks, such as Settings and Connections, also have pages and a contents page.

Notebook: Contents page — A list of all the documents and sections in a notebook (Table of Contents).

Notebook Database — A collection of data that is globally shared among documents contained in the Notebook.

Options sheet — An e-case form that you use to set attributes for a document or for a selection in the document. For example, you can choose a font style for the text in a document from the Character options sheet. Use a checkmark (+) gesture to display the Options sheet.

page — Each document you create is a single, scrollable page in the notebook, even if its printed version is many pages. Every time you create a new document, e-case adds it as a page in your notebook. The first page of the notebook is always the Notebook: Contents page.

page tabs — Tabs at the bottom of the page that let you turn to different pages (parts) of your document. In Day Planner, they are called day tabs.

pen alignment — Positioning of the stylus tip so that the ink is targeted at the spot the user intends it to be. Pen alignment is performed in settings.

Preferences — A set of pages in the Settings notebook that contain options for customizing **e-case**. For example, you can set a preference for a different writing pad style from the Writing page.

ProfileBook — An **e-case** document that stores all the information in the Notebook database. It includes profiles for every item you have entered.

Publication — Stationery used to display formatted text and graphics to provide an interactive electronic product encyclopedia.

resize — To make an object, such as a page in the notebook, larger or smaller on the screen so that it is a more convenient size to work with.

resize handle — The element that you drag to change the size of an object such as an edit pad, Options sheet, or floating document. Resize handles are located at the bottom or lower right corner of the sheet or page. They are identified by a “break” in the border of the sheet or page.

screen — Full area of display on the tablet.

scroll — To move horizontally or vertically in a document to see areas that do not fit on the screen. Scroll by flicking (see “flick” on page -3) or by tapping the gesture margin (see “gesture margin” on page -4).

section — A container on the Notebook: Contents page for documents that are grouped together. Section names appear in bold type. You can Expand a section to show all the documents in it or Collapse it to show the section name only.

select — To indicate text or an object to be affected by the next command you choose. When something is selected, its appearance changes; usually the background behind it darkens.

selection — Something you've chosen on the screen that the next **e-case** command will affect.

shutdown — Shutting down saves the state of all documents and should be performed at the end of each day. To shut down properly: Tap the Shutdown button in the briefcase. When the screen has gone dark and there is no more hard drive activity, slide the power switch off.

signature pad — A writing pad you use to add a signature to a document. The signature remains just as it is written on the screen; it is not translated into typed text.

single marquee — A moving dashed line that surrounds a selection or object that shows you it is ready to be moved.

slot 1 — The bottom slot of the tablet that contains the hard drive.

slot 2 — The top (auxiliary) slots of the tablet that contain a modem and/or flash disk.

standby — Press the Standby button on the side of the tablet (located above the power switch) to put the tablet into a power-saving dormant state. Press the Standby button again to resume.

starburst — A symbol that appears briefly on the screen to indicate that you have drawn a gesture correctly but in a location where it will not work.

starburst with a question mark — A symbol that appears briefly on the screen when **e-case** doesn't recognize a gesture you've drawn.

Stationery — A template for a new document. You choose a piece of stationery from the Stationery choice list or from the Stationery notebook when you want to create a new document.

stroke — A continuous line of ink. Some gestures have more than one stroke, made without lifting the pen completely away from the screen. The eraser erases one stroke at a time.

stylus — The special pen that you use to write on the computer screen.

tablet — Computer that contains **e-case**.

tab — An identifying label that you attach to any page of the Notebook. The tab extends beyond the border on the right side of the screen so you can see it while working on any page of the Notebook. You can turn directly to a page by tapping its tab.

TextPaper — Stationery used for writing documents. It has standard word-processing features.

tile — An area or space in a document that displays a particular type of information. Day Planner Tiles include Appointment, To Do, Event and Note. Month Planner tiles include Calendar and Objective. ListPaper documents have one tile.

time-out — The number of seconds that **e-case** waits before it responds to something you do, such as the interval before it translates what you've written or interprets a gesture.

title bar — The area of a document at the top of the screen that contains the name of the document and the page number.

translate — To convert your handwriting into typed, electronic, text. You translate your writing by tapping the OK button on the edit pad.

unrecognized character — The symbol **e-case** displays if it doesn't recognize a letter you wrote in an edit pad. The standard symbol is a question mark in a circle.

zoom — Zooming makes a document fill the entire screen. Flick up in the document title bar to zoom.

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