

Palm Pilot Setup

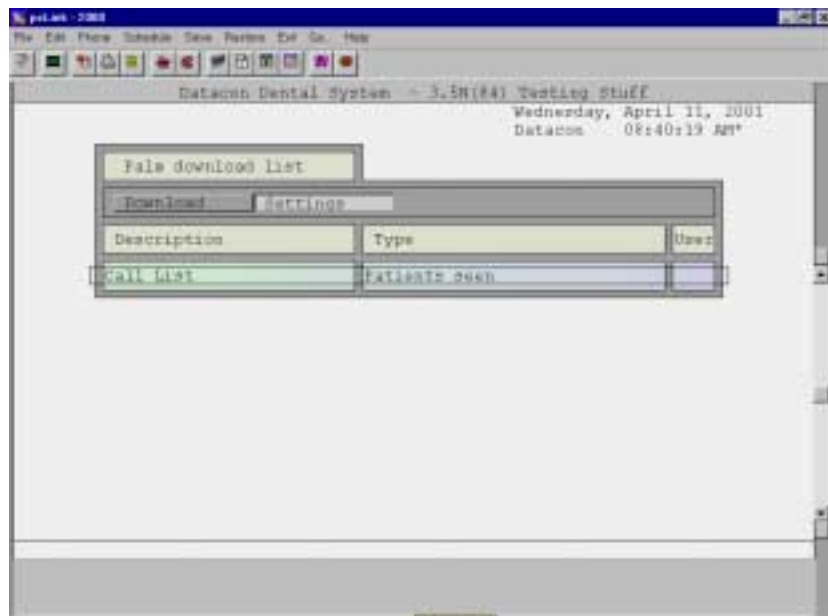
Set up Folder on PC

- Right-click on *Start*, click on *Explore* | Windows Explorer will appear
- Arrow up and click on *C:* so it is highlighted | It is important that you highlight the C: drive so that it is the “selected” drive.
- Click on *File*, point to *New* and click on *Folder* | The “New Folder” will appear on the right side of the screen
- Type “palm download” for the name of the new folder | The “palm download” name is important as you will be using this folder name in Datacon.

Set up Datacon

You will tell Datacon what path and filename to use for each download you want to use. You also want to do an initial creation of a file before setting up the Palm software.

- At the Main Menu, **SEARCH** and type “palm”
- **SELECT** *Download addresses to Palm OS via Palm Desktop* | The following screen will appear:

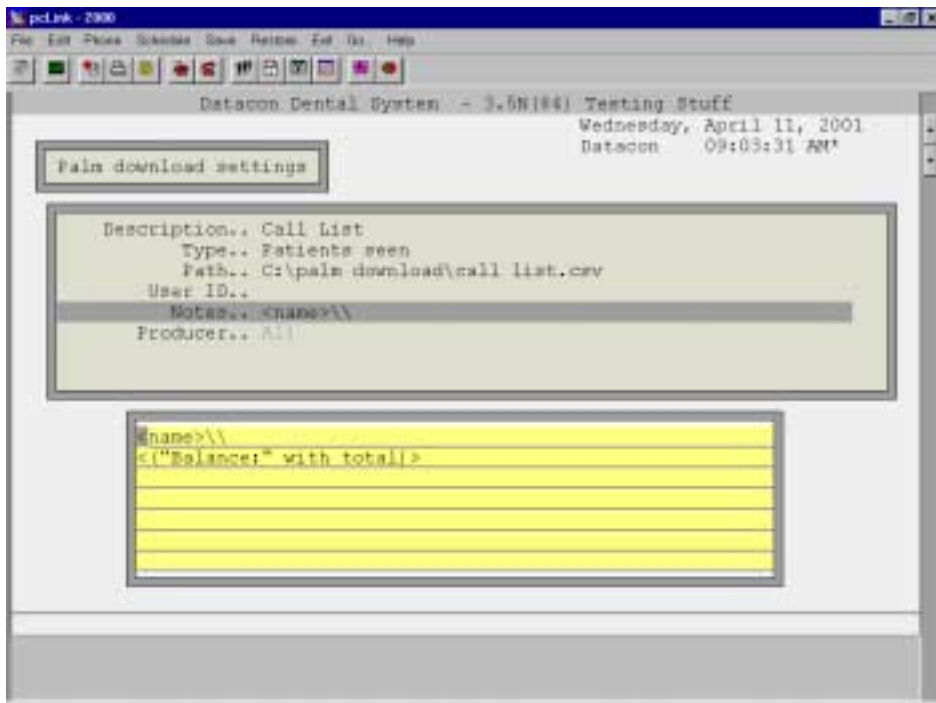


- to *Settings*

The Settings options allows you to set up new downloads or edit current ones.

- to add a new download

The following screen will appear:



- **Type the description for your new download**

This name can be anything descriptive so you know what the download is.

- **Type and click the arrows and select the type you want.**

The types are: Scheduled Patients, Patients Seen, User Defined List, Turboscan for Patients, Turboscan for Accounts, Turboscan for Referral Sources.

- **Path and type the path: "C:\palm download\filename.csv"**

This path refers to the folder you created on your PC earlier. The filename is the unique name for the download file.

- **User ID and type the user ID to match the Palm**

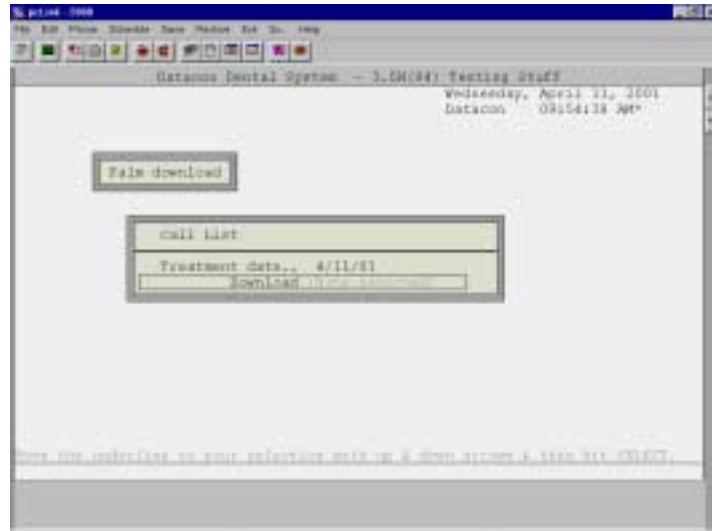
This field can be blank.

- **Notes and enter the merge fields you want for the download**

The information from these merge fields will show in the notes on the Palm after download occurs.

- and to *Download*,

The following screen will appear:



- *Treatment Date*
- *Download*

This defaults to today's date but you can enter a different date.

The download will occur and the screen will tell you Download Complete. If you look in Explorer in the C:\palm download folder, you will see the filename you used for this initial download.

Palm Set Up on PC

- **Install the Palm Software onto PC**

The Palm will come with a CD for installation.
Install the Visor Prism.

Click Next

Install the Typical – Next

Select the USB Cradle – Next

Select Synchronize with Palm Desktop – Next

Type your User ID – Next

Mail Setup – No

Uncheck Register online now – Finish

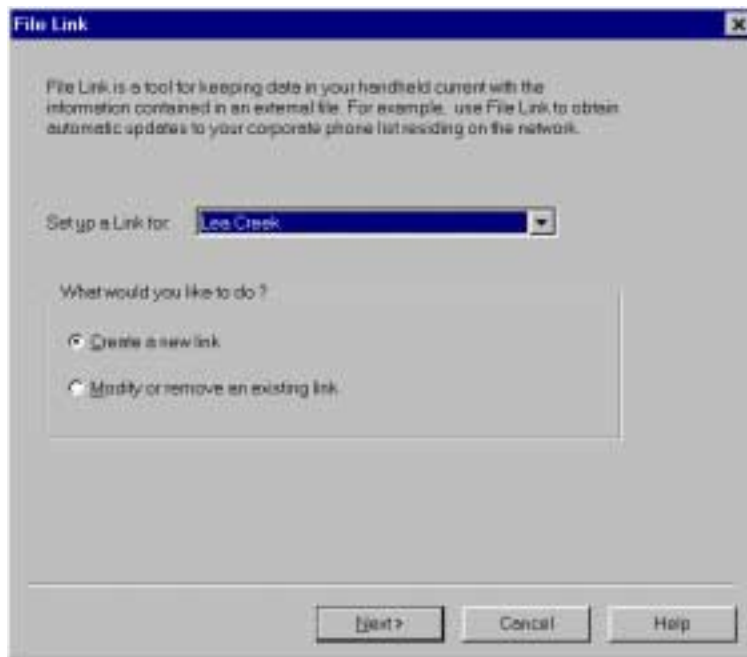
Exit

- **Click on the *Palm Desktop* icon on your Windows Desktop**

This will open the Palm software

- **Click on *Hot Sync* and click on *File Link***

The following screen will appear:

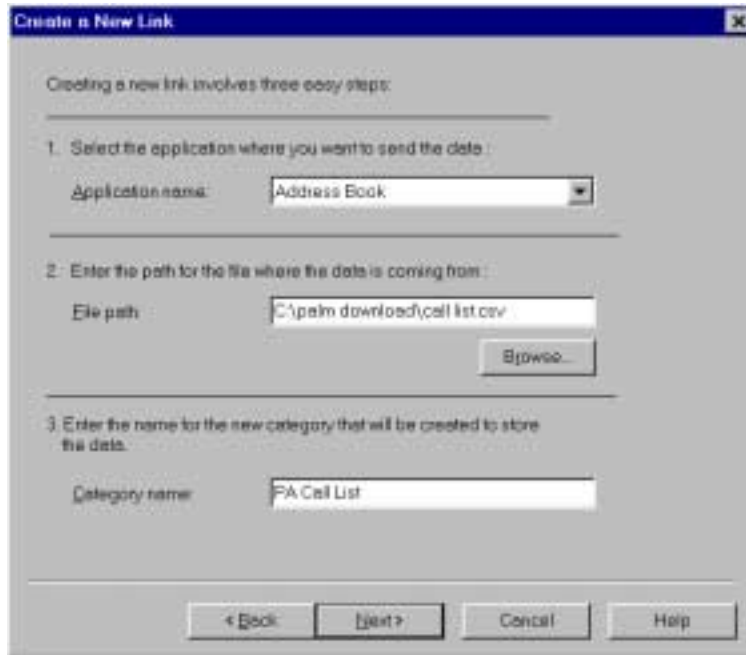


- **Type the User ID in the *Set up a link for***

This name refers back to the Datacon set up and the User ID.

- **Click on *Create a new link*, click *Next***

The following screen will appear:



- Click on **Browse**, go to your **C:** drive, then the **Palm Download** folder and click the file you created above in **Datacon**. It is important that you create the .CSV file before performing this step.
- Click in **Category Name** and type a name This name can be up to 15 characters long
- Click **Next** The following screen will appear:



- Click *OK* and click on *Done*

That is the end of the set up for the Palm. You want to create a new link for each download you want to do.

Synchronizing to the Palm

- Push the *Hot Sync Button* on your Palm Pilot

The synchronization will occur and you will be able to view your downloaded list.