

HOWTO Install PocketMoney for Pocket PC v2.0

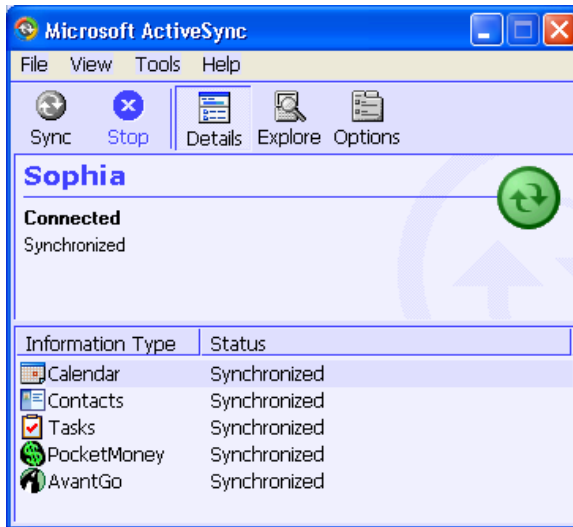


Figure 1

Step 1

Dock your PDA and allow it to *completely* synchronize before running the installer.

Figure 1 shows ActiveSync after synchronization is complete. If PocketMoney v1.1.x is installed and its synchronization component is active, it will be listed as shown.

NOTE If this is an upgrade from 1.1.x and the synchronization component is active, a cradle connection using a Serial/USB cable must be used.

ActiveSync will not allow a wireless or wired Ethernet connection when it senses a database upgrade is needed. For a smooth upgrade, please use a cradle.

Step 2

Run PM_PPC_2_0_1_EN.exe. **Figure 2** will appear.

Depending on the version you will be installing or upgrading to, the filename may be slightly different.

To continue the installation process, click **Next**. To cancel the installation process, click **Cancel**.

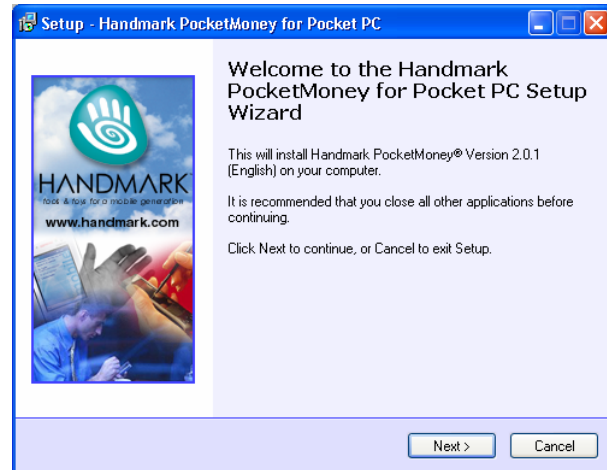


Figure 2

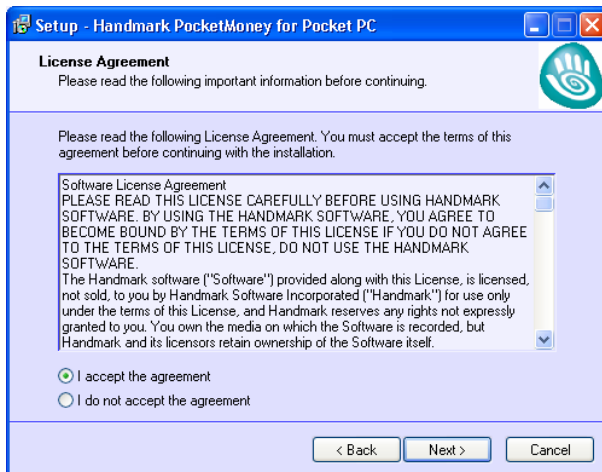


Figure 3

Step 3

Figure 3 shows the next screen in the installation process. Read the Handmark License Agreement entirely.

Select "**I accept the agreement**" to agree to the terms. *The installation can not be completed without agreeing to the licensing terms.*

To continue the installation process, click **Next**. To return the previous page, click **Back**. To cancel the installation process, click **Cancel**.

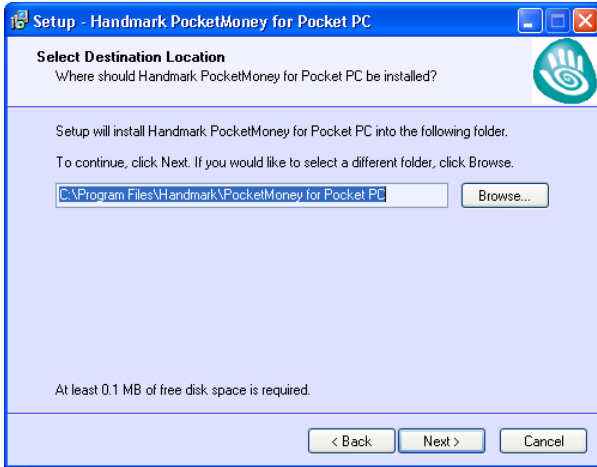


Figure 4

Step 4

Figure 4 prompts where to install PocketMoney. The default location is automatically provided.

Click **Browse...** to select another location. *If a previous version of PocketMoney is found on your computer, the path will reflect that original location. It is highly recommended to overwrite the original installation.*

To continue the installation process, click **Next**.
To return the previous page, click **Back**.
To cancel the installation process, click **Cancel**.

Step 5

Figure 5 determines which components to install. The application component is required, but the synchronization component is optional.

If this is an upgrade and v1.1.x synchronization is already active, it will automatically be selected for upgrade. *For synchronization to continue to work properly, do not uncheck this box.*

To continue the installation process, click **Next**.
To return the previous page, click **Back**.
To cancel the installation process, click **Cancel**.

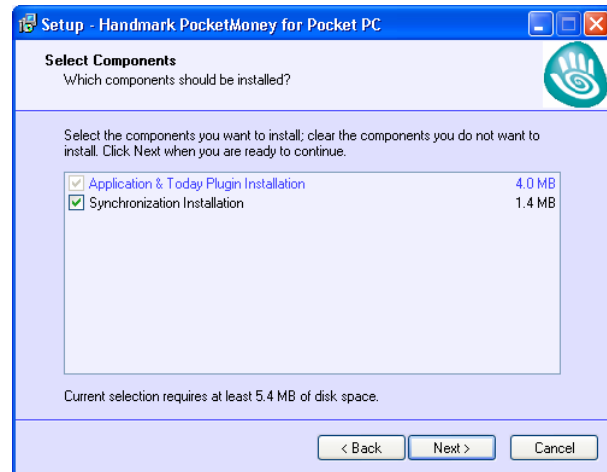


Figure 5

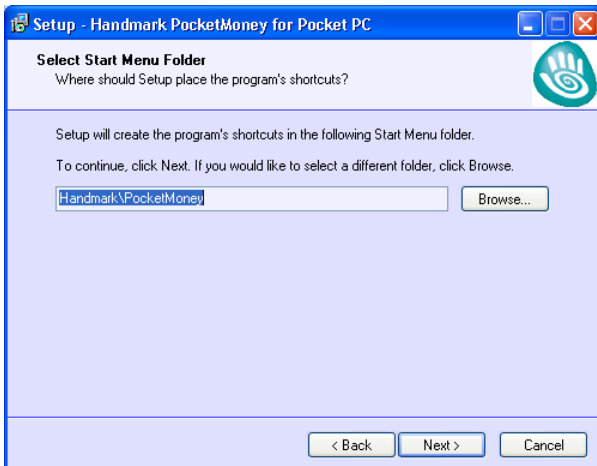


Figure 6

Step 6

Figure 6 determines where the shortcuts will be installed. If this is an upgrade it will contain the location of the last install.

Click **Browse...** to select another location.

To continue the installation process, click **Next**.
To return the previous page, click **Back**.
To cancel the installation process, click **Cancel**.

Step 7

Figure 7 summarizes all choices made to this point. Clicking **Install** will begin the actual installation process.

To continue the installation process, click **Install**.
To return the previous page, click **Back**.
To cancel the installation process, click **Cancel**.

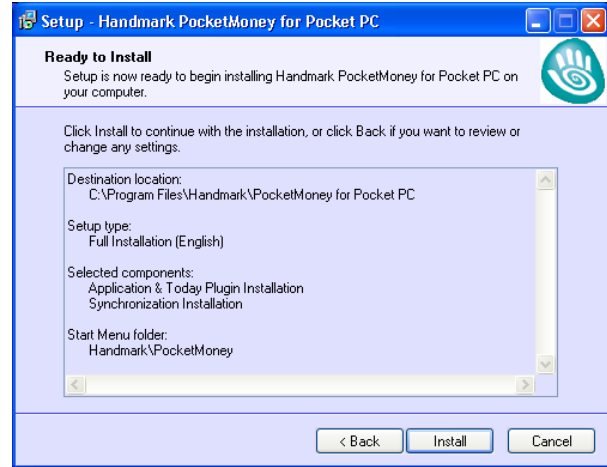


Figure 7

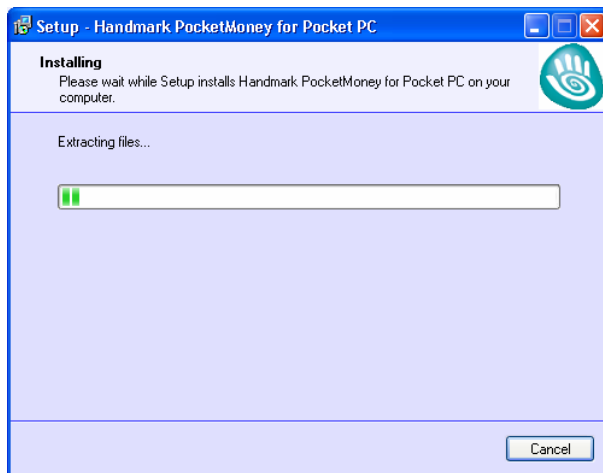


Figure 8

Step 8

Figure 8 shows the actual installation process.

If the synchronization component is marked for installation, then ActiveSync will be temporarily disabled while the installation is performed. It will be restarted automatically at the end of installation.

WARNING Do not reopen ActiveSync manually during any remaining steps of the installation process.

To cancel the installation process, click **Cancel**.

Step 9

Once all necessary files have been copied to your computer, the installer will launch the PDA installation process.

If either component of PocketMoney is already installed on the PDA, **Figure 9** will appear. The Sync component will read "Handmark PocketMoney Sync". Click **Yes** to continue the installation.

If this is a new installation or **Yes** was selected to perform the PDA upgrade, **Figure 10** will appear.

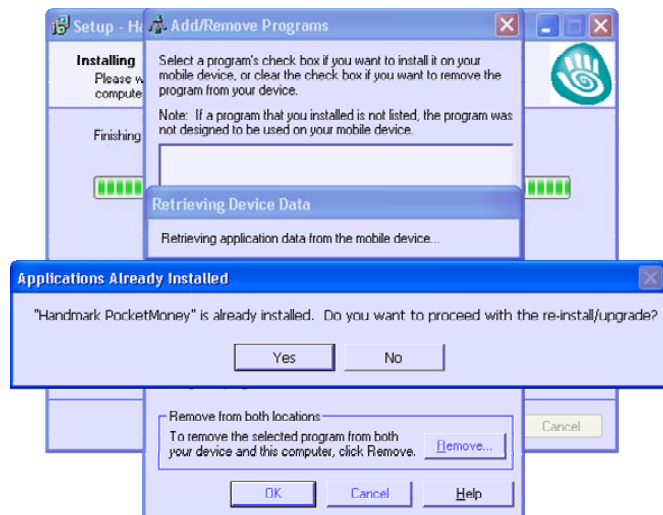


Figure 9

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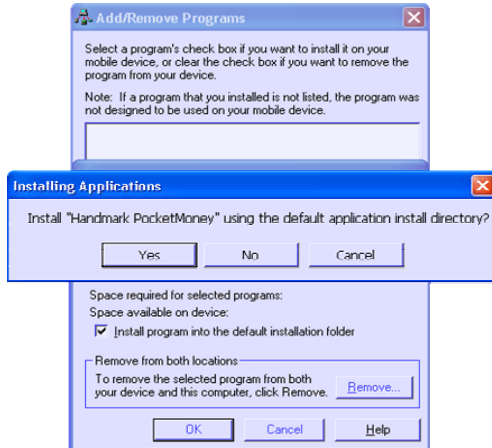


Figure 10

Step 10

If this is an upgrade, **Figure 11** will appear for both the application component and the synchronization component. The synchronization component would read "Handmark PocketMoney Sync".

Click **OK** on your PDA to allow the installation process to continue. A progress bar dialog will appear showing its progress.

Do **NOT** proceed to **Step 11** until you click **OK**.

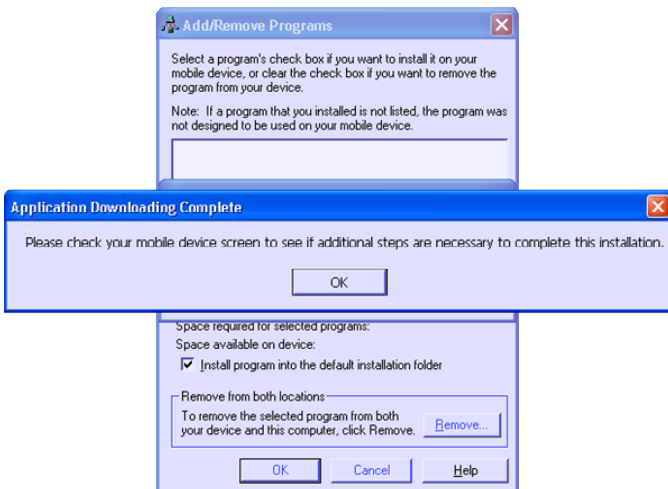


Figure 12

Figure 10 determines where on the PDA the application will be installed.

Select **Yes** to install PocketMoney in the default location for both the application and synchronization components.

NOTE At this time PocketMoney does not support storing data on flash cards. The application may run properly from the card, but the data is always stored locally on the device. Future versions will improve this facility.

A progress bar dialog will appear to show that the installation process is copying the necessary files to the PDA to complete the installation.

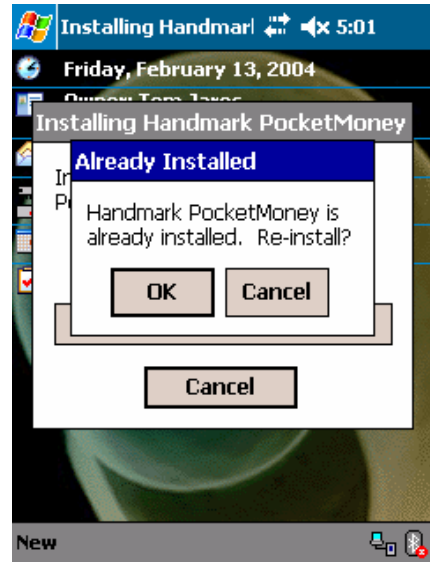


Figure 11

Step 11

Click **OK** on the dialog shown in **Figure 12**.

If the synchronization component was also chosen to be installed then repeat **Steps 9-11**.

If this is the second time this step has been performed, proceed to **Step 12**.

Otherwise, skip to **Step 13**.

Step 12

Figure 13 shows the last step in installing the synchronization component before any data located on the device gets synchronized on the desktop.

Click **OK** to allow the installer to restart ActiveSync.

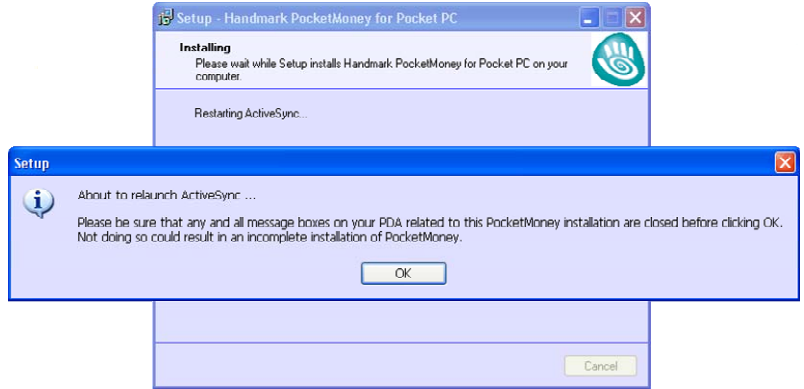


Figure 13



Figure 14

The System Tray icon for ActiveSync, located in the bottom right of your screen, will start spinning. It will look much like the green circle found in **Figure 14**.

Shortly after the ActiveSync System Tray icon starts spinning, a dialog box looking much like **Figure 15** will appear.

Be sure that "Combine the items on my device with the items on this computer." is selected and click **OK**. Synchronization will start.

NOTE Do not select any other option. Either all data will be deleted from the PDA or the synchronization will be delayed.

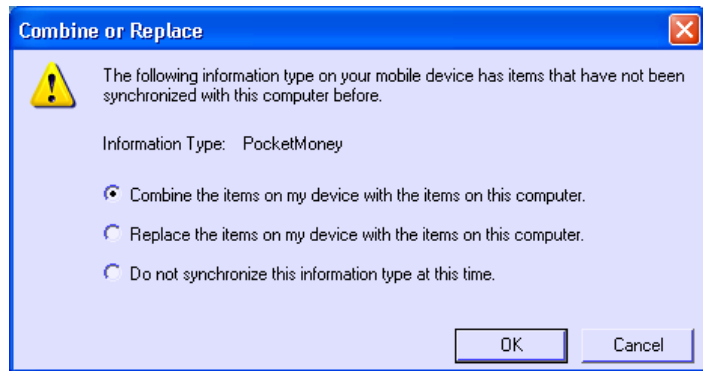


Figure 15



Figure 16

Step 13

Figure 16 provides options for reading documentation or registering PocketMoney at Handmark.

Click **Finish** to close the installer and allow any options selected above to be displayed.

NOTE It is safe to close the installer even if synchronization is being performed. However, be sure to allow synchronization to complete before undocking the PDA.

Once synchronization is completely finished, feel free to restore any previous Ethernet connections. The cradle is no longer needed to continue to perform synchronization.