



## How Do I?



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Use Ami Pro with SmartSuite



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Use Approach with SmartSuite



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Use Organizer with SmartSuite



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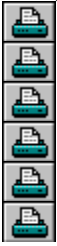


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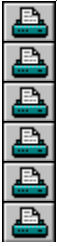


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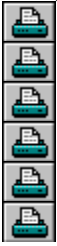
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## About SmartCenter



SmartCenter is an icon palette that lets you access all of your SmartSuite applications. You can click the SuiteAnswers icon to get assistance on all SmartSuite tasks.

The SmartCenter icon palette first appears in the top right corner of your Windows screen, but you can move the SmartCenter icon palette wherever it is convenient for you.

The first time you start SmartCenter, it automatically adds icons for all Lotus applications that you have installed. You can also add icons for non-Lotus applications, so you can access these applications easily as well.

If you want to take a tour of SmartCenter and SmartSuite features, you can click the Guided Tour button in the Welcome dialog box or choose Guided Tour from the SuiteAnswers menu.





## About SuiteAnswers



SmartCenter includes several different types of assistance on the SuiteAnswers menu.

## Help Cards

You are currently using a Help Card. You can use Help Cards to get information on how to use SmartCenter or how to use SmartSuite features such as creating a Freelance presentation from an Ami Pro document. To access the Help Cards, click , choose How Do I?, and select a topic, or choose Search and search for a topic. You can also access Help Cards by clicking the Help button while you are using SmartCenter features.

Use  to move to the previous topic,




to print the current topic, and




to shrink the display of the Help topic.

## ScreenCam Movies

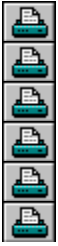
SmartCenter comes with three ScreenCam movies: Copy a 1-2-3 range to Ami Pro, Copy an Organizer address to Ami Pro, and Create Approach mail labels in 1-2-3. You can view these movies or view movies created by you or others by clicking  and choosing Movie Guide.

## Guided Tour

The Guided Tour gives you a visual overview of SmartCenter and SmartSuite features. You can access the Guided Tour by clicking  and choosing Guided Tour or by clicking the Guided Tour button in the Welcome dialog box.



## Changing the applications SmartCenter displays



You can change the number of applications displayed on the SmartCenter icon palette and menu.

1. Choose Customize SmartCenter from the SmartCenter menu.



2. Select either the SmartCenter icon palette or the SmartCenter menu.
3. Select the check box for the application you want to display or remove.
4. (Optional) To remove the application from the list, select the application and click Remove Application, then click Yes or No.
5. Click OK.

**Note** The first time you start SmartCenter, it automatically adds all Lotus applications to the SmartCenter icon palette. Each subsequent time you start SmartCenter, it searches for any newly-installed Lotus applications and adds these applications to the SmartCenter icon palette.





## Adding new applications



You can add new applications to the SmartCenter icon palette and menu.

1. Choose Customize SmartCenter from the SmartCenter menu.



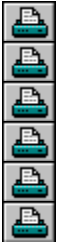
2. Click Add Application.
3. Enter the name of the application that you want to display on the SmartCenter icon palette or menu.
4. Enter the path for the application's program file.
5. Enter the path for the application's data files.
6. If the application supports object linking and embedding, select Supports OLE Drag and Drop.
7. Select the icon you want SmartCenter to display on the icon palette.
8. Click OK twice.

**Tip** To see a list of file names, click Browse.

**Note** You cannot add a new application that exists on a network drive unless you currently have access to the application's files on the network.



## Editing the path for an existing application



You can update the path for an existing application so SmartCenter can locate the application.

1. Choose Customize SmartCenter from the SmartCenter menu.



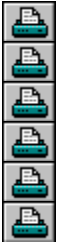
2. Click the application you want to update.
3. Click Change Application.
4. If necessary, enter the name of the application.
5. Enter the updated path for the application's program file.
6. Enter the path for the application's data files.
7. If the application supports object linking and embedding, select Supports OLE Drag and Drop.
8. If the application you are modifying is not a Lotus application, select an icon to display on the icon palette.
9. Click OK twice.

**Tip** To see a list of file names, click Browse.

**Note** You cannot change the path to a network drive unless you currently have access to the application's files on the network.



## Removing ScreenCam movie locations



If you want to update an existing movie location, you must first remove the existing location from the box and then you can add the new location.

1. Choose Customize SmartCenter from the SmartCenter menu.



2. Click the ScreenCam Movies tab.
3. To remove a location for ScreenCam movies, select the location from the box and then click Remove Location.
4. Click Yes to remove the location or click No to cancel the command.
5. Click OK.



## Adding new ScreenCam movie locations



You can enter a new path so SmartCenter can locate your movie.

1. Choose Customize SmartCenter from the SmartCenter menu.



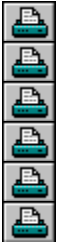
2. Click the ScreenCam Movies tab.
3. Click Add Location.
4. Select the drive and directory that contain your movie.
5. Click OK twice.

**Note** When you first install SmartSuite, the only ScreenCam movies that SmartCenter displays are the movies located in the SmartCenter directory.





## Viewing ScreenCam movies



You can view the ScreenCam movies that SmartCenter provides or movies that others created.

1. Choose Movie Guide from the SuiteAnswers menu.

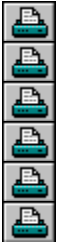


2. Select the movie you want to view.
3. Click Play ScreenCam Movie.

**Note** SmartCenter comes with three ScreenCam movies: Copy a 1-2-3 range to Ami Pro, Copy an Organizer address to Ami Pro, and Create Approach mail labels in 1-2-3. You can also create your own movies or view movies created by others.



## Changing SmartCenter options



You can change the startup, placement, and icon palette options for SmartCenter.

1. Choose Customize SmartCenter from the SmartCenter menu.

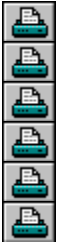


2. Click the Preferences tab.
3. Select the options you want to use.
4. Click OK.

**Note** If you want to use large icons, do not anchor the SmartCenter icon palette to the top right corner of the screen.



### Searching your hard disk for a program file



Use the Browse for Application dialog box to find and select program files when you are adding or changing applications.

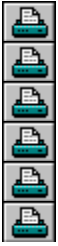
1. Choose Customize SmartCenter from the SmartCenter menu.



2. Click Add Application or Change Application.
3. Click Browse.
4. Select a drive from the Drives box.
5. Select a directory from the Directories box.
6. Select the program file for the application from the File Name box.
7. Click OK three times.



### **Problem starting application**



SmartCenter cannot find the application you selected. This message may appear for several reasons; however, you most likely are not connected to the network where the application resides, you removed the application, or you moved the application to another directory.

Do one of the following:

- Click OK if you want to leave the application on the SmartCenter icon palette or menu.
- Click Remove Item if you want to remove the application from the SmartCenter icon palette or menu.
- Click Change to update the path so SmartCenter can find the application.





## Copying a 1-2-3 range to an Ami Pro table



You can use Copy and Paste to copy a 1-2-3 range to Ami Pro.

1. Start 1-2-3.



2. Open the worksheet file that contains the range you want to copy.



3. Select the range.
4. Choose Edit - Copy.



5. Start Ami Pro.



6. Open a document.



7. Place the insertion point where you want the 1-2-3 range to appear.
8. Choose Edit - Paste.





## Linking a 1-2-3 range to an Ami Pro table



When you link a 1-2-3 range to an Ami Pro table, the data in the table reflects changes in the 1-2-3 range.

1. Start 1-2-3.



2. Open the worksheet file that contains the range you want to link.



3. Select the range.

**Tip** If you are working on an untitled worksheet file, you must save the file before you complete step 4.

4. Choose Edit - Copy.



5. Start Ami Pro.



6. Open a document.



7. Place the insertion point where you want the linked data to appear.






8. Choose Edit - Paste Link.



## Embedding 1-2-3 data into Ami Pro



When you embed data from 1-2-3 into Ami Pro, the data becomes part of the document. You can use 1-2-3 from within Ami Pro to edit the data.

1. Start 1-2-3.  

2. Open the worksheet file that contains the data you want to embed.  

3. Select the data.  
**Tip** If you are working on an untitled worksheet file, you must save the file before you complete step 4.
4. Choose Edit - Copy.  

5. Start Ami Pro.  

6. Open a document.  

7. Place the insertion point where you want the embedded data to appear.
8. Choose Edit - Paste Special.
9. Select OLE Link from the Formats box.
10. Click OK.



### Copying an Ami Pro table into 1-2-3



You can use Copy and Paste to copy an Ami Pro table to 1-2-3.

1. Start Ami Pro.



2. Open the document that contains the table.



3. Click anywhere in the table and choose Table - Select Entire Table.

4. Choose Edit - Copy.



5. Start 1-2-3.



6. Open a worksheet file.



7. Select a range that has the same number of rows and columns as the Ami Pro table.

8. Choose Edit - Paste.







### Using Ami Pro styles in 1-2-3



You can copy styles from Ami Pro to make your worksheet data look like your document.

1. Start 1-2-3.



2. Open a worksheet.



3. Start Ami Pro.



4. Open the document containing the styles you want to use.



5. Click the SmartIcons button in the status bar.



6. Select Bonus Pack to display the Ami Pro Bonus Pack icon set.

7. Click the Styles icon.



8. Select the styles that you want to copy or choose Select All.





9. Click OK to add the styles to 1-2-3 as named styles.



## Copying an Organizer address into Ami Pro



You can copy names and addresses from Organizer to an Ami Pro document.

1. Start Ami Pro.  

2. Open a document.  

3. Place the insertion point where you want the address to appear.
4. Start Organizer.  

5. Open the file that contains the address you want to copy.
6. Display the address.
7. Click the address record.
8. Choose Edit - Copy Special - Name, Position, Company, Address.
9. Switch to Ami Pro.  

10. Choose Edit - Paste Special.
11. Select Text from the Formats box.
12. Click OK.



## Creating and printing a monthly calendar in Ami Pro using Organizer data



You can easily move data from Organizer to Ami Pro where you can print it as a monthly calendar.

1. Start Organizer.



2. Open the file that contains the calendar data.



3. Start Ami Pro.



4. Click the SmartIcons button in the status bar.



5. Select Bonus Pack to display the Ami Pro Bonus Pack icon set.

6. Click the Calendar icon.



7. Select the month and year of the calendar you want to create.

8. Click OK.

9. Choose File - Print.







## Copying a Freelance table into Ami Pro



You can use Copy and Paste to copy a Freelance Graphics table into Ami Pro.

1. Start Freelance Graphics.



2. Open the presentation that contains the table you want to copy.



3. Select the table.

4. Choose Edit - Copy.



5. Start Ami Pro.



6. Open a document.



7. Create a table with the same number of columns and rows as the Freelance Graphics table.



8. Click the top left cell in the Ami Pro table.

9. Choose Edit - Paste.







## Copying a Freelance graphic into Ami Pro



You can use Copy and Paste to copy a Freelance Graphics graphic into Ami Pro.

1. Start Freelance Graphics.



2. Open the presentation that contains the graphic you want to copy.



3. Select the graphic.

4. Choose Edit - Copy.



5. Start Ami Pro.



6. Open a document.



7. Place the insertion point where you want the graphic to appear.

8. Choose Edit - Paste.







## Creating a Freelance presentation from an Ami Pro document



You can use an Ami Pro Bonus Pack icon to create a Freelance Graphics presentation from selected text or an entire document.

1. Start Ami Pro.  

2. Open the document you want to use for the presentation.  

3. Select the text you want to include in the presentation.

**Tip** If you do not select any text, Freelance Graphics uses all of the text in the Ami Pro document.

4. Click the SmartIcons button in the status bar.



5. Select Bonus Pack to display the Ami Pro Bonus Pack icon set.
6. Click the Slide Show icon.



7. Follow the instructions and watch the macro create the presentation.



## Inserting a Freelance organization chart into Ami Pro



You can insert a Freelance Graphics organization chart as a frame in an Ami Pro document.

1. Start Ami Pro.



2. Open the document in which you want to insert the organization chart.



3. Click the SmartIcons button in the status bar.



4. Select Bonus Pack to display the Ami Pro Bonus Pack icon set.

5. Click the Organization Chart icon.



6. Select the style of organization chart you want to create.

7. Click OK.

8. Enter your organization chart data.

9. Click OK.



## Using Freelance curved text in Ami Pro



You can use an Ami Pro Bonus Pack icon to display Freelance Graphics curved text in an Ami Pro frame.

1. Start Ami Pro.



2. Open the document that contains the text you want to curve.



3. Select the text you want to curve.

4. Click the SmartIcons button in the status bar.



5. Select Bonus Pack to display the Ami Pro Bonus Pack icon set.

6. Click the Curved Text icon.



7. Select a shape to apply to the text.

8. Click OK.










## Creating Ami Pro handouts from a Freelance presentation



You can include each Freelance Graphics presentation page as a frame in an Ami Pro document.

1. Start Freelance Graphics.  

2. Open the presentation that contains the information you want to use.  

3. Start Ami Pro.  

4. Open a document.  

5. Click the SmartIcons button in the status bar.  

6. Select Bonus Pack to display the Ami Pro Bonus Pack icon set.
7. Click the Handouts icon.



8. Select the layout for your handouts.
9. Click OK.



## Linking Approach data to Ami Pro



When you link records from an Approach database to an Ami Pro document, the data in the document reflects changes made in the Approach records.

1. Start Approach.



2. Open the file that contains the records you want to link.
3. Select the records.
4. Choose Edit - Copy.



5. Start Ami Pro.








6. Place the insertion point where you want the records to appear.
7. Choose Edit - Paste Link.




## Using a 1-2-3 range to create a Freelance table



You can use Copy and Paste to copy a 1-2-3 range to a Freelance Graphics presentation.

1. Start 1-2-3.  

2. Open the worksheet that contains the range you want to copy.  

3. Select a range.
4. Choose Edit - Copy.  

5. Start Freelance Graphics.  

6. Open a presentation.  

7. Choose Chart - New - Table.








8. Select a table style.
9. Specify the same number of columns and rows as the range.
10. Click OK.
11. Click the upper left cell in the Freelance Graphics table.
12. Choose Edit - Paste.  




### Linking a 1-2-3 chart to Freelance



When you link a 1-2-3 chart to a Freelance Graphics presentation, the Freelance chart reflects changes in the 1-2-3 chart.

1. Start 1-2-3.  

2. Open the worksheet file that contains the chart.  

3. Select the chart.
4. Choose Edit - Copy.  

5. Start Freelance Graphics.  

6. Open a presentation.  

7. Choose Edit - Paste Special.



8. Select 1-2-3 Graph from the Format box.
9. Click Link.











### Copying a Freelance table into 1-2-3



You can use Copy and Paste to copy a Freelance Graphics table into 1-2-3.







1. Start Freelance Graphics.  

2. Open the presentation that contains the table.  

3. Select the table.
4. Choose Edit - Copy.  

5. Start 1-2-3.  

6. Open a worksheet file.  

7. Select the range where you want the table to appear.
8. Choose Edit - Paste.  




### Copying a Freelance graphic into 1-2-3



You can use Copy and Paste to copy a Freelance Graphics graphic into 1-2-3.

1. Start Freelance Graphics.  

2. Open the presentation that contains the graphic.  

3. Select the graphic.
4. Choose Edit - Copy.  

5. Start 1-2-3.  

6. Open a worksheet file.  

7. Select the range where you want the graphic to appear.
8. Choose Edit - Paste.  




## Linking a 1-2-3 range to a Freelance chart



When you link a 1-2-3 range to a Freelance Graphics chart, the data in the chart reflects changes in the worksheet.

1. Start 1-2-3.



2. Open the worksheet file that contains the range you want to link.



3. Select the range.

**Tip** Include labels in the first row and first column of this range.

4. Choose Edit - Copy.



5. Start Freelance Graphics.



6. Open a presentation.



7. Choose Chart - New - Data Chart.



8. Choose a chart type.

9. Choose a style.

10. Click OK.

**Tip** If the range includes column and row labels, click the second cell under axis labels.

11. Choose Edit - Paste Special.



12. Select Link Data.



13. Click OK twice.



### Creating Approach mailing labels in 1-2-3



You can create Approach mailing labels while working in 1-2-3.

1. Start 1-2-3.  

2. Open the worksheet file that contains the addresses you want to use.  

3. Select the range. Include the column headings in the range.
4. Choose Tools - Database - Mailing Labels.
5. Select the SmartMaster address layout that you want to use.
6. Select the field from the "Database fields" box that you want to appear in the first box of the address label.
7. Click Add.
8. Repeat Steps 6 and 7 for the remaining fields you want to use.
9. Select the label type.
10. Click OK.
11. Choose File - Exit & Return to Lotus 1-2-3.





## Using 1-2-3 data to create an Approach database



You can use a 1-2-3 worksheet or named range to create an Approach database.

1. Start Approach.



2. Choose File - Open.








3. Select Lotus 1-2-3 from the "List files of type" box.
4. Specify the 1-2-3 file that contains the data you want to use to create the Approach database.
5. Click OK.
6. Select the worksheet or range name you want to use.
7. Click OK.
8. Specify the name of the Approach database.
9. Click OK.



### Copying an Organizer address into 1-2-3



You can copy names and addresses from Organizer to a 1-2-3 worksheet.



1. Start 1-2-3.  

2. Open a worksheet.  

3. Place the cursor where you want the address to appear.
4. Start Organizer.  

5. Open the file that contains the address you want to copy.
6. Display the address.
7. Click the address record.
8. Choose Edit - Copy Special - Name, Position, Company, Address.
9. Switch to 1-2-3.  

10. Choose Edit - Paste.  




## Importing an Organizer file into Approach



You can import addresses stored in the Organizer address section to an Approach database.


1. Start Organizer.  

2. Open the file that contains the addresses you want to use.
3. Choose File - Export.
4. Select Address from the "From Section" box.
5. Select dBase II/III/IV from the "Export format" box.
6. Enter the name of the exporting file in the "Export file" box.
7. Click OK.
8. Select fields to export in the "Field mapping" box.
9. Click Export.
10. Click OK.
11. Start Approach.  

12. Open a file you want to import the Organizer addresses to.  
**Tip** Make sure the Approach database has field names similar to the Organizer field names.
13. Choose File - Import Data.
14. Select the Organizer file to import.
15. Click OK.
16. Select the fields in the "Import Setup" dialog box.
17. Select your import options in the "Import Setup" dialog box.
18. Click OK.



## Importing an Approach file into Organizer



You can import addresses stored in an Approach database into the address section of Organizer.

1. Start Organizer.
-  2. Open the file that you want to contain the Approach addresses.
3. Choose File - Import.
4. Select Address from the "Into Section" box.
5. Select dBase II/III/IV from the "Import format" box.
6. Enter the name of the imported file in the "Import file" box.
7. Click OK.
8. Map the fields from the source file to fields listed in the "Field mapping" box.
9. Click Import.
10. Click OK.





## Using 1-2-3 data for a mass mailing in Ami Pro



You can merge names and addresses from a 1-2-3 database table into an Ami Pro document to create a mass mailing of the document. Make sure you create the 1-2-3 database table before you start Ami Pro.

1. Start Ami Pro.



2. Open the document you want to mail.



3. Choose File - Merge.



4. Select step 1 and click OK.
5. Specify 1-2-3 rel 3 & 4 from the "List files of type" box.
6. Specify the worksheet file that contains the address database table and click OK.
7. Click OK to use field names from the first record in the database table.
8. Click OK to start step 2 of the merge.
9. Click Yes to use the current document as the merge document, or click No to open another document.
10. Insert the merge field by selecting a field name from the list, positioning the insertion point in the document, and clicking Insert.
11. Repeat Step 10 for each field you want to insert.
12. Choose Continue Merge when you finish inserting merge fields.
13. Click OK and make selections in the dialog boxes for step 3.



## Using Organizer addresses for a mass mailing in Ami Pro



You can merge names and addresses from Organizer into an Ami Pro document to create a mass mailing of the document. Make sure you create the Organizer address records before you start Ami Pro.

1. Start Ami Pro.



2. Open the document you want to mail.



3. Choose File - Merge.



4. Select step 1 and click OK.
5. Specify Organizer from the "List files of type" box.
6. Specify the Organizer file that contains the address records and click OK.
7. Click OK to start step 2 of the merge.
8. Click Yes to use the current document as the merge document, or click No to open another document.
9. Insert the merge field by selecting a field name from the list, positioning the insertion point in the document, and clicking Insert.
10. Repeat Step 9 for each field you want to insert.
11. Choose Continue Merge when you finish inserting merge fields.
12. Click OK and make selections in the dialog boxes for step 3.



## Using an Approach address database for a mass mailing in Ami Pro



You can merge names and addresses from Approach into an Ami Pro document to create a mass mailing of the document. Make sure you create the Approach address records before you start Ami Pro.

1. Start Ami Pro.



2. Open the document you want to mail.



3. Choose File - Merge.



4. Select step 1 and click OK.
5. Specify dBASE from the "List files of type" box.
6. Specify the Approach database file (.dbf) that contains the address records and click OK.
7. Click OK to start step 2 of the merge.
8. Click Yes to use the current document as the merge document, or click No to open another document.
9. Insert the merge fields by selecting a field name from the list, positioning the insertion point in the document, and clicking Insert.
10. Repeat Step 9 for each field you want to insert.
11. Choose Continue merge when you finish inserting merge fields.
12. Click OK and make selections in the dialog boxes for step 3.



## Attaching a file to Notes



When you attach a file to Notes, you can later launch or detach the file from the Notes document.

1. Start Notes.



2. Compose a new document.

**Tip** If you open an existing document, choose View - Edit Mode.

3. Place the insertion point where you want to attach the file.
4. Choose File - Attach.



5. Specify the file to attach.
6. Click Insert.





### Sending and routing ranges from 1-2-3



You can send a range or worksheet to other 1-2-3 users who have electronic mail. When you route mail, the message will be sent from one recipient to the next in the order you specify.

1. Start 1-2-3.



2. Open the worksheet file that contains the range you want to send.



3. Select the range.

4. Choose File - Send Mail.



5. Click OK.

6. Select an option:

- "Formulas and values" leaves formulas intact.
- "Values only" converts formulas in the range to their values.

7. Click OK.

8. Enter a message in the text block.

9. Click Send.

10. Enter the names of the recipients in the To box.

**Tip** If you plan to route the range, enter the names in the order you want the range sent.

11. Select one of the following:

- "Route to addresses in sequence" converts your list to a numbered route list.
- "Send to all addresses at once" broadcasts the range to all the recipients at the same time.

12. Enter a subject.

13. Click Options if you want to select delivery and tracking options.

14. Click Send.



## Sending mail from Ami Pro



You can compose mail messages using Ami Pro. Then you can send the messages from Ami Pro instead of having to switch to your mail application.

1. Start Ami Pro.



2. Open a document and compose a message.
3. Choose File - Send Mail.



4. Select the mail option you want.
5. Click OK.
6. Enter the names of the recipients in the To box.
7. Click Send.



## Sending and routing mail from Approach



You can send and route data from Approach databases as mail. When you route mail, the message will be sent from one recipient to the next in the order you specify.

1. Start Approach.



2. Open the file that contains the records you want to send.



3. Select the records.
4. Choose File - Send Mail.





5. Select the mail options you want.
6. Click OK.
7. Enter the names of the recipients in the To box.
8. Select "Route to addresses in sequence" from the drop-down list box.
9. Click Send.



## Using Notes data to create an Approach database



You can use data from a Notes database to create an Approach database.

1. Start Approach.  

2. Choose File - Open.  

3. Select Lotus Notes - Local (\*) from the "List files of type" box.
4. Specify the Notes database that contains the data you want to use to create the Approach database.
5. Select the name of the view or form you want to open from the "File name" box.
6. Click OK.





## Using Drag and Drop to copy data from 1-2-3 to Approach



The SmartCenter Drag and Drop feature lets you copy data quickly between applications.

### To set up SmartCenter Drag and Drop

1. Choose Customize SmartCenter from the SmartCenter menu.



2. Click Lotus 1-2-3.
3. Click Change Application.
4. Select the "Supports OLE Drag and Drop" check box.
5. Click OK.
6. Repeat steps 2-5 for Lotus Approach.
7. Click OK.

### To use SmartCenter Drag and Drop

1. Start 1-2-3.



2. Open the worksheet file that contains the range you want to copy.



3. Select the range.
4. Drag the mouse pointer to the Approach icon in the SmartCenter icon palette. Make sure you continue to hold down the mouse button.



SmartCenter automatically starts or switches to Approach.

5. Drag the mouse pointer to the location in the Approach worksheet where you want the data to appear.
6. Drop the 1-2-3 data in place by releasing the mouse button.

