

The Handheld “iOffice” for Agents

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5/6/2014



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MODULE 1 - CORE ESSENTIALS

What do you need for this iPad workshop?

- An iPad running iOS (the latest update)
- An Apple ID account
- Student Guide

Remember: Make sure you are always running the latest version of the iPad and the Apps you use. Updates will not only fix bugs but also provide you with new features.

This workshop begins with a brief presentation. Instructor will discuss why you need this workshop then review the iPad's **Exterior features**.



Name two functions of the volume buttons: Control the volume and _____.

If a user simultaneously presses the Sleep/Wake button and the Home button, they will take a _____ of what is on the screen.

HOME SCREEN

Let's start with the main screen in an Unlocked state. We're starting here because we have a few new features with iOS7.

- (1)The Camera Icon. Take a picture without typing in your passcode.
- (2) The Slide to Unlock Option. You do NOT have to slide at the bottom, but anywhere across the screen – as long as you slide from L to R.
- (3)Need to correct the small typeface? **Settings>General>Accessibility>BoldText**

SPOTLIGHT SEARCH

- “Spotlight Search” is the Search My iPad screen. To access it, pull down your screen half-way. (iOS7)



- To customize, visit **Settings>General>Spotlight** search. To customize, uncheck the items you do not use on your iPad, place your hand on the grip strip (three lines) and reorder.

THE STATUS BAR

You have a Status Bar at the top (hard to see in iOS7) which serves 2 functions besides telling the time and other information: Notifications and Immediate access to the top of the page or what we can call “Super-Fast Scrolling”. Try it in mail – that’s where I use it every day.

MULTI-TASKING AREA

When you double click the home button, you can see any additional apps that you have opened, that may be running the background. In this way the Home button can assist you in switching back and forth between apps. You can scroll through these miniature windows and see what apps are running in the background or shut down one of these apps and conserve power. If you decide to close several at one time, you can use 3 fingers to do this.

NOTIFICATIONS

To get started, go to **Settings>Notification Center** and turn on alerts for the apps that you want to hear from. In addition you can sort the apps manually or by time (the newest ones show up on top). To manually sort the apps, tap Edit at the top, and use the grip strip (3 lines) to drag them in a new order.

The notification area will appear after you drag down and thanks to iOS7, you now get 3 screens of notifications that are worthy of our attention: **Today, All and Missed**

THE CONTROL CENTER

To access the Control Center, swipe (slowly) from the lower area of the screen to the top. You will see several functions: Music Playback, Utilities (ipad timer, camera, and screen brightness) and Network Alert Settings (WiFi, Do Not Disturb, Airplane mode, BlueTooth).

DO NOT DISTURB

You can temporarily suspend alerts and calls from certain people (or all people) by using this important feature. Go to **Settings>Notifications> Do Not Disturb**.



AN ISSUE OF PRIVACY

Who should know your location? Apps like Maps and Foursquare need your location in order to work. But there may be times when you may decide that you do not want your location to be known. To turn off the GPS tracker, go to **Settings>Privacy>Location Services>Off**

Do you want to give social networking sites and app developers access to your Contacts list? To your preferences? Be careful about this. Some apps are free but they want access to your preferences and your contacts for advertising purposes. iOS7 now includes an option to limit advertisers from tracking you around the Web. **Settings>Privacy>Advertising**

IPAD GESTURES (AND MULTI-TOUCH OPTIONS) TO WORK FASTER

<u>Pinch or Stretch (or Spread)</u>	Place two fingers, like your thumb and index finger, on the edges of a map, Web page, almost anything, and then make a pinching motion. Today we will use a Safari as an example of this. Pinching will make the area on the map smaller. Stretching will have the opposite (zooming) effect. So remember Pinching shrinks, Stretching zooms.
<u>Four-or-Five Finger swipe/pinch.</u> First tap Settings>General>Multitasking* Gestures. Turn this feature “On”. The description is found underneath. Instructor Demo:	To quickly reveal the multi-tasking bar, use four or five fingers to swipe upward. **Swipe left or right with four or five fingers to switch between recently used apps. If you have drifted far from home, “pinch,” using four or five fingers to jump to your Home screen.

MODULE 2 – THE KEYBOARD

Go to **Settings>General>Keyboard** and (1) make sure all of your auto corrections and shortcuts are on. (2) add another keyboard if desired – most people have at least their native language and Emoji for emotions. (3) Turn on the option to **Split keyboard**.

TIME FOR SHORTCUTS

Keyboard shortcuts are those 2-3 letter codes for phrases you type often. You can add as many as you want and you’ll never have to type the phrase again. Here’s an example. Let’s open up an email. If you find that you are always typing: “Talk to you later” all you need to type is TYL, if you have created a shortcut for this.



EDITING ON THE IPAD

1. Open the **Notes** App
2. To select a paragraph: tap with two fingers or tap four times in rapid succession.
3. To make a correction, use the glass to position your finger on the spot where you need to make the correction. Position the cursor in the right place for the correction.
4. **The Spacebar.** (1) Tap the spacebar to accept a suggested word, or tap the suggested word to decline the suggestion. (2) **Double tap** the spacebar to put a period and a space (automatically) at the end of a sentence. There is no Tab key. What do you do? _____.
5. **Save time and don't lift your finger.** No need to dash between the QWERTY and number keyboard just to insert a small punctuation mark. Just **tap the number keyboard key** and while holding it, drag to the number or symbol you want, then let go. [Teacher Demo]
6. **Tap and Hold on the keyboard.** Use this gesture combination to access special accent marks, alternate punctuation, and URL endings. Example. **Need an Apostrophe key?** No need to move to the Number keyboard. Just **tap and hold** or flick upward. **Need quotation marks?** **Tap and hold** the **Period** key, or flick up.
7. Question? How do you UNDO on the iPad? _____

MODULE 3 – ADD-ONS AND ACCESSORIES FOR AGENTS

1. Apple iPad Camera Connection Kit – pictures and videos on the iPad easy and directly from your camera.
2. Stylus or Bamboo Pen (Digital signatures) – You can use DocuSign, SignNow, or SignMyPad to digitally sign documents.
3. Keyboard (iJuanita uses the Logitech keyboard. It can also be used as a case.)
4. Bluetooth Wireless Headset
5. Apple TV
6. Camera Telescope Lens

MODULE 4 - ALL ABOUT APPS

Fine-tune App Preferences – There are 2 types of apps, those that keep their preferences located in the app, and those that have a separate set of preferences located in the iPad's Settings under Apps. It's a good idea to visit this area. You may uncover options you would prefer more than the default option. **Home>Settings** and flick down to the individual apps. Tap the name of the app that you want to customize.

Create a Folder of Apps - The best way to manage apps is to create folders. To do this simply drag one app on top of another. Next, assign an appropriate name for this group. To delete the folder, remove the apps.

Troubleshoot an App – Every now and then you download a buggy app or the new iOS update reconfigured the functionality of the app, causing some strange interactions. To troubleshoot the problem (1) restart your iPad (2) check for updates (3) remove the app and reinstall. If it's a paid app, you can download for free.

If you download an app and it still is misbehaving, it's probably the app's fault. Report the problem to the developer. Go to the App Store and find the app's page. Tap **Review and Ratings** and at the bottom of the screen, tap **App support**.

If you need help from Apple, you can either call **800-275-2273** or email them. From the iTunes Store's main page, click on the link that says **Support**.

MODULE 5 – ITUNES & ICLOUD

What should you do as soon as you become an iPad owner?

1. Install iTunes on your Windows PC or Mac – www.apple.com/itunes/download
2. Install iCloud on your Windows PC or Mac - www.apple.com/icloud/setup

UNDERSTANDING ITUNES

→ You can use iTunes to sync up your calendar, contacts, music, photos, apps and more. It's a multimedia manager! Start by installing iTunes on your Windows PC or Mac. To sync you have 2 options:

OPTION 1 – WIRED

- a. Use the iPad's USB cable to connect the tablet to the computer.
- b. If it's your first time, follow the on-screen instructions.
- c. Select your iPad on the right side of the top navigation bar.
- d. You will see the iPad Summary tab fill the window.

OPTION 2 – WIRELESS

→ We now have Wi-Fi Sync – a wireless sync between your iPad and PC. This will allow you to keep apps, photos, videos, in sync **without** having to connect your iPad to your PC via the sync/charge cable.

Once this feature is enabled, every time you connect your iPad to a power source it will automatically sync and backup any new content purchased on the iPad to **iTunes**. You



can also manually force a sync by going to **Settings>General>iTunes Wi-Fi Sync>**and tapping **Sync Now**.

MODULE 6 - THE “APP CHALLENGE”

CATEGORY: HOME SEARCHING

Around Me- What is nearby the house, like a hospital, library, restaurants, etc. (\$0)

Open House Manager - Electronic open house log, downloads contacts – (\$3)

Find my iPhone - Helps you locate your iPad if lost.

CATEGORY: COMMUNICATION

Eyejot – Send a video email instead. (iPhone only)

Glympse – Time to share location and ETA. Slick App.

CATEGORY: PUTTING FILES ON YOUR IPAD

Dropbox: This app provides online file-syncing, up to 2 GB free storage. There are some security concerns here. If you would like to turn you iPad into a virtual traveling disk, consider using Box.net, offers 5 GB, or Skydrive that offers 7 GB of free storage.

CATEGORY: REMOTE ACCESS AND BUSINESS TOOLS

LogMeIn. Remote Access. Works with Mac and PC. Download the PC client and the iPad app! You can now talk to a Windows Network. Also try *Teamviewer* App.

_____ - Free app lets you take notes, store links, images, audio files and more. Register and grab your email address. Allows you to store contracts, files, photos and videos. You can send documents to your iPad this way. Juanita’s favorite.

Skitch - App that allows you to write on a .pdf, screenshot, and an image

CATEGORY: EDITING MICROSOFT OFFICE DOCS

_____ – Use Word, Excel, and PPT Free Options include CloudOn.

CATEGORY: PDF APPS

Adobe Reader. Write on a PDF and save it. Very basic.



PDF Splicer. The ultimate PDF Page Editor. Combine 2 pdfs; insert pages from one document into the other. Rotate pages. Delete pages. *FREE*

SignNow - Signature app. Sign and fill PDF and Word documents. Free \$0

CamScanner. Can't get to a fax? What app allows you to convert a photo into a document? You simply take a picture of the document, receipt, etc. Crop to the corners and it will process the image.

CATEGORY: FLASH APPS

Photon, or Puffin, or Skyfire. Let's you open Flash files on your iPad.

Commercial Agents? Try LoopNet (real estate search), Co-StarGo (comprehensive property information)

CATEGORY: WORKING WITH BUYERS AND SELLERS

- CamScanner – When you cannot get to a fax machine.
- ThankYouPro –Create and mail Thank you cards for \$2.99.

MODULE 7 – LET'S GO ONLINE

GOING ON A SAFARI

Tip – This is an iJM favorite. Want an icon for your favorite sites on your Home Screen? Bookmarking them is not enough? Time to create a “**web clip**” (1) Open the web page you want and tap the **Action** icon. (2) Tap **Add** to Home Screen (3) Type a new name for your web clip or leave the one that Apple suggests. (4) Tap **Add**.

MANAGING EMAIL MESSAGES – IMPORTANT TIPS AND FACTS

For this exercise, go to Settings.

1. To add a signature line, phrase or section of text to every email message you send: **Setting>Mail, Contacts, Calendar>Signature**
2. To send a photo with an email message, tap and hold until you see a bubble of options appear. Select **insert photo or video**.
3. iPad in Landscape allows you to see the Inbox. iPad in Portrait hides it.
4. Dates/times and addresses are often hyperlinked to the calendar and maps respectively. Thus the reason I recommend that you use the native Email app.

CALENDAR TIPS

Native iPad App. Open the calendar and choose a view (i.e. week) from the top. Add an event from the lower right hand corner of the screen (+) OR Tap and Hold on the time/day. To search for an appointment, use the search box in the upper-right corner.

Need to set a meeting with multiple people on your iPad? Try Doodle.com. Doodle is an iPad Safari-friendly website that lets you set a meeting with a group of people.

QUICK CONTACT TIPS

The settings for the Contacts app is in **Settings>Mail, Contacts, Calendars**.

To Delete a Contact. Find the contact, _____ and click the red **Delete Contact** button. Like Calendar, use iCloud to sync Outlook Contacts

MODULE 8 – SIRI AND VOICE CONTROL

It's nice to have your handheld ioffice on the road with a personal assistant in tow. That's what Siri provides an ipad or iphone owner. It's programmed to understand regular conversational language.

Let's begin by turning her on, Go to **Settings>General>Siri** and turn it on. To talk to Siri, hold down your home button. New to iOS7:

1. **Twitter integration** is new. You can now say, "What is ___ saying on Twitter?"
2. Ask Siri to **look up an image** and it brings up the top Bing results. "Look up mountain images."
3. Now Siri can **navigate to settings** and perform functions while you sit back and relax. Try, "Open Settings." Then "Turn off Bluetooth"
4. Pronunciation Lesson. Siri can now be told, by you, "*That's not how you pronounce that*" and Siri will walk you through helping her with correction.

Siri can now be a male. Go to **Settings>General>Siri>Voice Gender**

ACCESSIBILITY TIP

Need to invert colors? **General>Accessibility>Triple –click home>On*****

QUESTIONS? NEED MORE TIPS? LET'S CONNECT



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