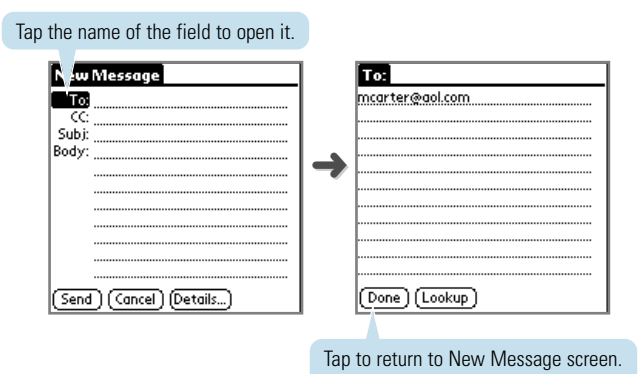
3. To send a copy of the e-mail item to additional recipients, tap the CC field, and enter the e-mail addresses of the additional recipients, separating the addresses with a comma followed by a space.

4. Tap the Subject (Subj:) field and enter a subject for your e-mail item.

5. Tap the Body field and enter the text of your e-mail item.

Tip: If the address, CC, subject, or body exceeds the capacity of the screen display, tap the name of the field (for example, tap "To:") to expand that field. Tap Done to return to the New Message screen.



To reply to an e-mail item:

1. Tap an e-mail item in the Message List to display it on the screen.

2. Tap Reply.

3. In the Reply Options dialog box, tap the Reply To pick list. Tap to select who should receive the reply—the sender only or all recipients; or tap Forward to reply to someone who didn't see the original e-mail item.

4. Tap Include Original Text to include the original e-mail message in the reply. Clearing the option creates a blank reply.

5. If you selected Include Original Text, tap Comment Original Text to let you edit the original text.

6. Tap OK.

7. Enter the text of your reply.

8. If you are forwarding the message, enter a recipient in the To field.

9. Tap Send to place your reply in the Outbox.

Looking Up an Address

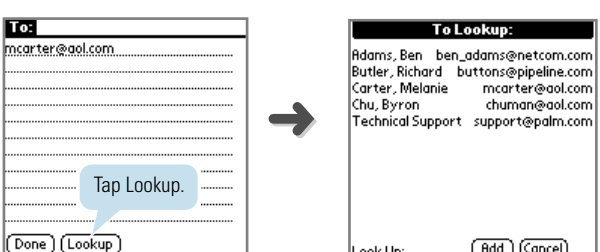
To identify the recipient of an e-mail item, you must enter that person's e-mail address. You can either enter the data directly in the To or CC field, or use the Look Up command to access the information in your Address Book.

To look up an e-mail address:

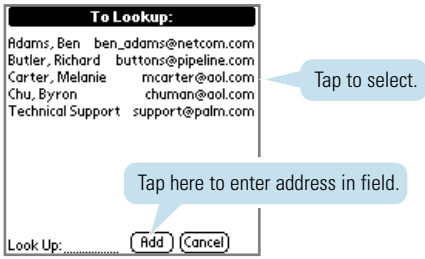
1. Tap either the To or CC field name to expand it.
2. Choose from the following options:
   - Tap Lookup to display the Lookup dialog box. The Lookup screen lists all records that contain information in an e-mail field.
   - Enter the first few letters of the last name of the person whose address you want to find, and tap Lookup. If your Smartphone completes the desired address for you, tap Done to return to the New Message screen.

   Tip: You can also display the Lookup dialog box from the New Message, To or CC screens by tapping the Menu icon on the front of your Smartphone; then tap Options and tap Lookup. Or use the Graffiti® Command stroke /L.

3. In the Lookup dialog box, enter the first letter of the entry you want, to scroll to the first entry that begins with that letter. Enter additional letters to have the list scroll to the first entry that starts with those letters.



5. Tap an address to select it. Tap Add.



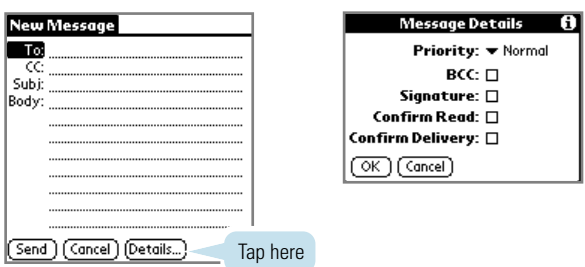
6. Tap Done to return to the New Message screen.

Adding Details to E-mail Items

Before you send your e-mail item, you can additional information to the message if your desktop e-mail application supports the feature. For example, you can specify the message's priority, create a blind courtesy copy, add a signature, or confirm that the message was delivered or read. Your Smartphone cannot attach to an e-mail items details or attributes that your desktop e-mail application doesn't support.

To add details to an e-mail item:

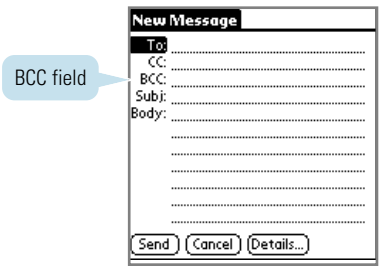
1. In the New Message screen, tap Details.



2. Choose from the following options:

Priority	Selects a ranking for the e-mail item from the Priority pick list. Choices are High, Normal, or Low priority. The Priority setting must be set for each e-mail item you create.
BCC	Creates a blind courtesy copy. The BCC option must be set for each e-mail item.
Signature	Attaches your signature to all subsequently created e-mail items until you deselect this option. The signature is visible only to the e-mail recipient, and does not appear in your e-mail item. See "Creating a signature for your e-mail item" for information on defining a signature.
Confirm Read	Requests a confirmation that the e-mail item was read.
Confirm Delivery	Requests a confirmation that the e-mail item was delivered.

3. Tap OK.



4. If you selected the BCC option, in the New Message screen, tap the BCC field and enter an address.

Adding a Signature for Your Message

By defining information as a signature, you can automatically attach it to the close of e-mail items and avoid recreating the information for each e-mail item. A signature can contain information on you or your company—such as your name, address, phone and fax numbers, and any other text you want to include. The signature is visible only to the e-mail recipient, and does not appear in your e-mail item.

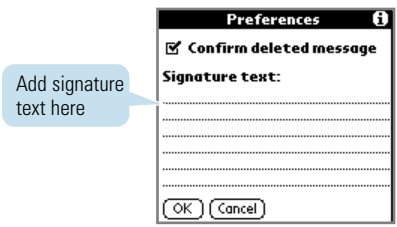
For information on attaching a signature to an e-mail item, see "Adding details to e-mail items."

To create a signature:

1. Tap the Menu icon to open the Mail menus.

2. Tap Options, and then tap Preferences.

3. Tap the Signature text field and enter the text of your signature.



4. Tap OK.

Storing and Editing E-mail Items

Sending an e-mail item from your Smartphone stores it in the Outbox folder until you perform a HotSync operation. You can edit unsent e-mail as long as you have not yet performed a HotSync operation.

You can also draft e-mail items and store them until you're ready to send them, and you can file e-mail items.

Storing and Editing Unsent E-mail Items

The e-mail items you send from your Smartphone are actually stored in the Smartphone Outbox folder until you perform a HotSync operation to synchronize your device with your computer. During synchronization, your Smartphone transfers e-mail items stored in the Outbox folder to your desktop e-mail application. The next time you send mail from this desktop application, it sends the mail created on your Smartphone.

When you edit an e-mail item, your Smartphone removes the item from the Outbox folder and displays the New Message screen, where you can edit the item and resend it, save it as a draft, or delete it.

For instructions on synchronizing your device, see "Synchronizing Mail with your e-mail application."

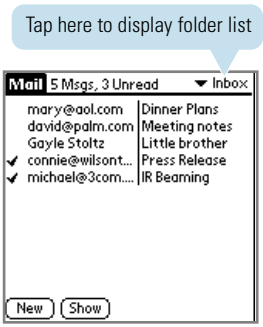
To store an e-mail item in the Outbox folder:

1. Create a new e-mail item or reply to an item. (See "Creating e-mail items.")

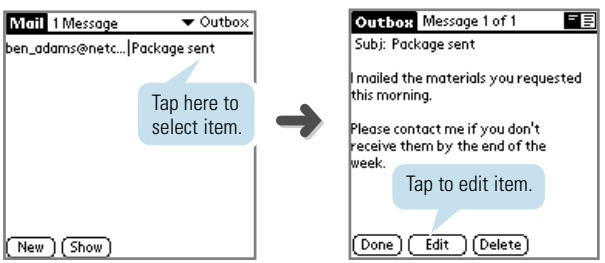
2. Then tap Send.

To edit an unsent e-mail item:

1. In the Mail list, tap Outbox in the pick list in the upper right corner of the screen.



2. Tap the e-mail item you want to retrieve.



3. Tap Edit. Change the e-mail item as desired.

4. Choose from the following options:

   - To return the e-mail item to the Outbox, tap Send.
   - To store the e-mail item in the Draft folder, tap Cancel. If prompted, tap Yes.

Drafting E-mail

You can save e-mail items that you're drafting and not ready to send by storing them in the Draft folder.

To save an e-mail item as a draft:

1. Create an e-mail item.

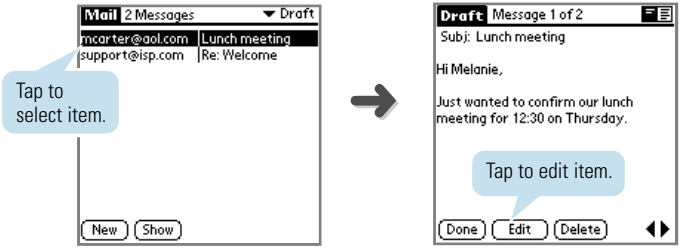
2. Choose from the following options:

   - Tap the Menu icon . Tap Message, and then tap Save Draft.
   - In the New Message screen, tap Cancel, and then tap Yes at the prompt.

To edit an e-mail item saved as a draft:

1. In the Message screen, tap Draft in the pick list in the upper right corner of the screen.

2. Tap the e-mail draft you want to display.



3. Tap Edit.

4. Enter any changes.

5. Choose from the following options:

- To resave the draft in the Draft folder, tap the Menu icon , tap Message, and tap Save Draft; or tap Cancel and if prompted, tap Yes.
- To transfer the item to your Outbox folder, tap Send.

Filing an E-mail Item

You can file e-mail in your Smartphone's Filed folder. During a HotSync operation, your Smartphone stores a backup copy of the Filed folder on your computer hard drive, but does not automatically synchronize the contents of this folder with your desktop e-mail application.

You can retrieve an e-mail item from the Filed folder, edit it, send it, save it as a draft, or return it to the Filed folder.

To file an e-mail item:

1. In the Mail list, tap an e-mail item to open it.

2. Tap the Menu icon .

3. Tap Message, and then tap File.

4. Tap No to save the e-mail item in the Filed folder, or tap Yes to file the item in the Filed folder and keep a copy in the Inbox.

To retrieve an e-mail item from the Filed folder:

1. In the Mail list, tap Filed from the pick list in the upper right corner of the screen.

2. Tap the e-mail item you want to restore.

3. Tap Edit to display and modify the item.

4. To store the e-mail item, choose from the following options:
   - Tap Cancel and tap Yes to store the item in the Draft folder.
   - Tap Send to store the e-mail in the Outbox.
   - Return the message to the Filed folder, following the preceding procedure.

Deleting E-mail Items

When you delete an e-mail item, your Smartphone stores it in the Deleted folder until you purge the folder's contents or perform the next HotSync operation. You can purge the contents of the Deleted folder to avoid having deleted e-mail monopolize your Smartphone's storage space. Synchronization deletes the e-mail item, as well as purged items, from your desktop e-mail application.

You can restore a deleted e-mail item by removing it from the Deleted folder, if you haven't purged the folder contents or performed a HotSync operation.

To delete e-mail:

1. In the Mail list, tap the e-mail you want to delete to open.

2. Tap Delete.

3. If prompted, tap Yes.

To restore an e-mail item by moving it out of the Deleted folder:

1. In the Mail list, tap Deleted from the pick list in the upper right corner of the screen.

2. Tap the e-mail item you want to restore.

3. Choose from the following options:

   - If you created the e-mail item that you deleted, tap Edit to display and modify the item. You can send the item or save it as a draft.
   - If you received the e-mail item that you deleted, tap Undelete to move the selected item to the Inbox and mark it as Read.

To purge the contents of the Deleted folder:

1. Tap the Menu icon .

2. Tap Message, and then tap Purge Deleted.

3. Tap Yes.

Note: You cannot restore e-mail items after you purge them.

To display a prompt before e-mail is deleted:

1. In the Mail list or in a Message screen, tap the Menu icon .

2. Tap Options, and then Tap Preferences.

3. To display a prompt, tap the Confirm Deleted Message screen. To delete a message without a prompt, clear the check box.

Categorizing and Sorting E-mail Items

You can display e-mail items by the folders your Smartphone provides for categorizing mail, and according to the e-mail date. The Date column is hidden in the Mail list by default to increase the available screen space.

You can also sort e-mail items by the date sent, by sender, or by subject. No matter how you sort the list, high-priority e-mail items always appear first.

To select an e-mail folder to display:

1. In the Mail list, tap the pick list in the upper right corner or your screen to display a list of folders.

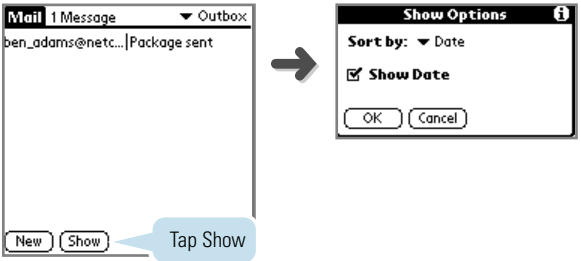
2. Tap a folder to choose one of the following options:

Inbox	Contains the e-mail from your desktop E-Mail application Inbox, minus any that you have excluded using filtering options. See "Creating special filters" later in this chapter.
Outbox	Contains the e-mail you created and sent on the organizer since the last HotSync operation.
Deleted	Contains the e-mail you deleted since the last HotSync operation.
Find	Contains the e-mail you want to store on the organizer.
Draft	Contains the e-mail you created using the organizer but are not yet ready to send.

3. To change the folder displayed, repeat steps 1 and 2 to choose another folder.

To display the Date column in e-mail items:

1. In the Mail list, tap Show.



2. Tap the Show Date check box to select it.

3. Tap OK.

To sort the Message List:

1. In the Mail list, tap Show.

2. Tap the Sort By pick list and tap one of the following options to select it:

Date	Sorts e-mail by date and displays the most recent e-mail item at the top of the screen.
Sender	Sorts e-mail by the sender's user name and displays items in ascending alphabetical order, based on the first word of the From field.
Subject	Sorts e-mail by the subject and displays items in ascending alphabetical order, based on the first word of the Subject field.

3. Tap OK.

Managing Your E-mail Application with HotSync

You can manage your e-mail application more effectively by selecting HotSync options to control which e-mail items download when you synchronize your Smartphone and your computer. You can define different settings for local and remote synchronization.

For example, you may want to download all of your e-mail items when you're working at the office and synchronizing your devices locally, but only urgent e-mail items when you're away from your office and synchronizing your devices remotely. Once defined, your Smartphone determines if synchronization is occurring locally or remotely and uses the appropriate settings for the HotSync operation.

You can filter messages to control which ones are downloaded, and you can set truncation options to download only part of lengthy e-mail items.

Downloading transmits only e-mail items and any text information, not attachments, to your Smartphone. Downloaded attachments are left in your desktop e-mail application.

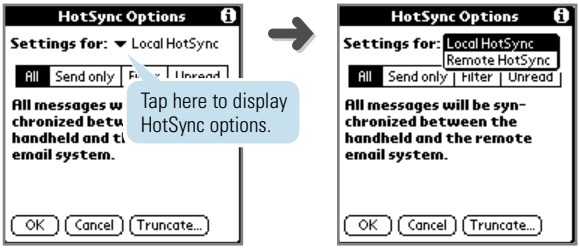
To set HotSync Options to control synchronizing e-mail items:

1. Tap to open the Applications Launcher, and tap Mail.

2. Tap the Menu icon .

3. Tap Options, and then tap HotSync Options.

4. Tap the Settings For pick list, and select Local HotSync or Remote HotSync.



Note: For more information about Local and Remote HotSync operations, see Chapter x.

5. Tap the filtering option you want to apply during synchronization:

All Downloads all e-mail items in your desktop Inbox to your Smartphone, and sends all e-mail items in your Smartphone Outbox to your desktop e-mail application.

Send Only Sends only the e-mail items in your Smartphone Outbox to your desktop e-mail application; from there, the application sends the items to their destinations.

Filter Downloads all e-mail items in your desktop Inbox that meet specific criteria to your Smartphone, and sends e-mail items that meet specific criteria from your Smartphone Outbox to your desktop application. When you select the Filter setting, the HotSync Options dialog box opens and displays additional filter settings. See “Creating special filters” later in this chapter.

Unread Downloads only unread e-mail items from your desktop Inbox to your Smartphone, and all items in your Smartphone Outbox to your desktop e-mail application.

6. Choose from the following options:
   - If you selected All, Send Only, or Unread, tap OK.
   - If you selected Filter, continue to the next section.

Using Filters to Control Downloading

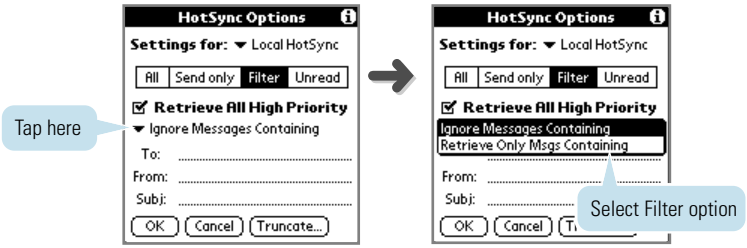
You can create special filters to control the type of e-mail items that download to your Smartphone during synchronization. Special filters ignore or retrieve items that contain specific information in their header fields, according to what you've instructed your Smartphone to look for in the To, From, and Subject fields.

To access the special filter settings:

1. In the Hot Sync Options dialog box, tap Filter.

2. If your e-mail application can flag high-priority items, tap Retrieve All High-Priority items to retrieve these items and override any filter settings.

3. Tap the pick list in the center of the HotSync Options dialog box, and choose whether to ignore or retrieve e-mail items based on the matching information:



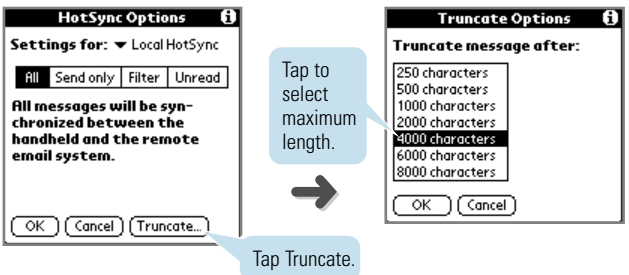
- Tap Ignore Messages Containing to have your Smartphone exclude e-mail items that meet the defined criteria and download all other e-mail items during synchronization. In general, this filter downloads more e-mail during synchronization because it blocks only one defined subset of e-mail.

- Tap Retrieve Only Msgs Containing to have your Smartphone include only the e-mail items that meet the defined criteria and ignore all other e-mail items during synchronization. This filter can block more e-mail during synchronization because it downloads only one subset of e-mail.

5. Enter a filter string in the To, From, and Subject fields. For information on creating filter strings, see “Defining filter strings” later in this chapter.

6. Tap Truncate to stop long e-mail items from downloading, and then specify a number of characters, between 250 and 8,000 (the default is 4,000.). Tap OK.

A lower value reduces the time to synchronize your desktop e-mail and Mail and the e-mail storage space that your Smartphone needs. Messages longer than 8,000 characters will be truncated.



7. Tap OK.

Defining Filter Strings

Your Smartphone filters e-mail items based on information in their To, From, and Subject fields, called a filter string. You create a filter string by listing the words you want your Smartphone to find and separating them by either a comma or a space. Each word in the filter string is joined by an implicit OR; your Smartphone adds the logical connectors like AND or OR.

To create a more complex filter, you can define filter strings for the To, From, and Subject fields. Your Smartphone joins the filter strings for these fields using an implicit AND, and adds the logical connector for you.

For example, you might want to receive only e-mail items from John Smith (jsmith@aol.com) or Jack Jones (jjones@aol.com) concerning the Apollo Project. You would create the following filter strings:

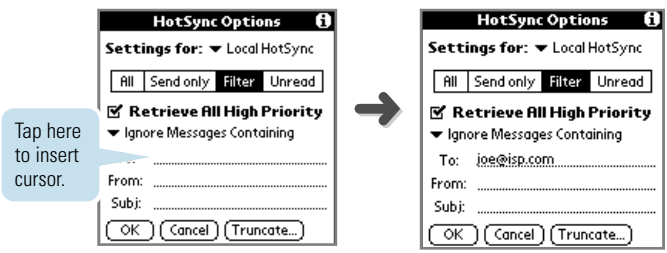
- In the To field: jsmith@aol.com, jjones@aol.com
- In the Subject field: Apollo Project

Your Smartphone interprets this as, "Accept e-mail items about the Apollo Project from John Smith or Jack Jones. Do not accept e-mail items from other people. Do not accept e-mail items from John or Jack about any other subject."

When you define a string, your Smartphone searches for any instance of that sequence of characters. For example, if you define a filter that retrieves only e-mail items with the string "info," appropriate matches would include "info," "rainforest" and "kinfolk."

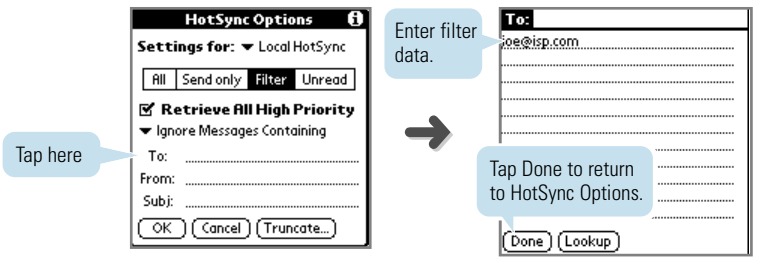
To define a filter string:

1. Tap the To, From, or Subject header field in the HotSync Options dialog box.



2. Enter your filter string, using commas or spaces to separate the words. Do not add connectors, such as AND or OR, between words in a string.

3. If your string exceeds the length of the field, tap the name of the field to display the Notes screen for that header field. See "Creating e-mail items" earlier in this chapter.



4. Tap Done to return to the HotSync Options dialog box.

5. Tap OK.

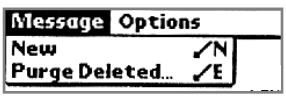
Mail Menus

Mail menus are shown here for your reference, and Mail features that are not explained elsewhere in this book are described here.

See “Using Menus” in Chapter x for information about choosing menu commands.

Message menus

The Message menu varies depending on whether you are viewing an e-mail item, creating an e-mail item, or viewing the Message List.



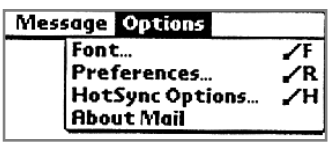
▲ Message List

▲ New Message

◀ View Message

Options menus

The Options menu varies depending on whether you are creating or editing an e-mail item.



▲ Message List

▲ New Message

About mails

Shows version information for Mail.

Beaming Information

Your Smartphone is equipped with an IR (infrared) port that you can use to beam information to another Palm Computing® connected device that's close by and also has an IR port. The IR port is located at the top of the smartphone, behind the small dark shield.

You can beam the following information between Palm Computing® connected devices:

- The record currently displayed in Date Book, Address Book, To Do List, or Memo Pad.
- All records of the category currently displayed in Address Book, To Do List, or Memo Pad.
- A special Address Book record that you designate as your business card, containing information you want to exchange with business contacts.
- An application installed in RAM memory.

To select a business card:

1. Create an Address Book record that contains the information you want on your business card.

2. Tap the Menu icon .

3. Tap Record, and then tap Select Business Card.

4. Tap Yes.

To beam a record, business card, or category or records:

1. Locate the record, business card, or category you want to beam.

2. Tap the Menu icon .

3. Tap Record, and then tap one of the following:

   The Beam command for an individual record

   In Address Book only:

   Beam Business Card, Beam Category.

4. When the Beam Status dialog box appears, point the IR port directly at the IR port of the receiving organizer.

   Tip: For best results, Smartphone should be between 10 centimeters (approximately 4 inches) and 1 meter (approximately 39 inches) apart, and the path between the two devices must be clear of obstacles. Beaming distance to other Palm Computing® connected devices may be different.

5. Wait for the Beam Status dialog box to indicate that the transfer is complete before you continue working on your phone.

To beam an application:

1. Tap to open the Applications Launcher.

2. Tap the Menu icon .

3. Tap App, and then tap Beam.

4. Tap the application you want to transfer.

Note: Some applications are copy-protected and cannot be beamed. These are with a lock icon next to them.

5. Tap Beam.

6. When the Beam Status dialog box appears, point the IR port directly at the IR port of the receiving device.

7. Wait for the Beam Status dialog box to indicate that the transfer is complete before you continue working on your phone.

To receive beamed information:

1. Turn on your phone.

2. Point the IR port directly at the IR port of the transmitting organizer to open the Beam Status dialog box.

3. Tap Yes.

4. Wait for the Beam Status dialog box to indicate that the transfer is complete, and then tap OK to display the new entry.

   Incoming records are placed in the Unfiled category.

Tips on beaming information:

- You can press the Address Book application button for about two seconds to beam your business card.
- You can set the full-screen pen stroke to beam the current entry. See "Pen preferences" in Chapter x for more information.
- You can use the Graffiti Command stroke /B to beam the current entry.

10

CHAPTER10

Memo Pad

Memo Pad

The Memo Pad provides a place to take notes that are not associated with records in the Date Book, Address Book, or To Do List.

Use the Memo Pad to:

- Take notes or write any kind of message on your connected organizer.
- Drag and drop memos into popular computer applications like Microsoft® Word when you synchronize using Palmtop software, if app and HotSync® technology.
- Assign memos to categories so that you can organize and view them in logical groups.
- Write down phone numbers and other types of information. Later, you can copy and paste this information into other applications.

Opening the Memo Pad

You can also open the Memo Pad by tapping the Memo icon in the Application Launcher.

1. Tap to open the Application Launcher.

2. Tap the Memo icon.

Creating Memos

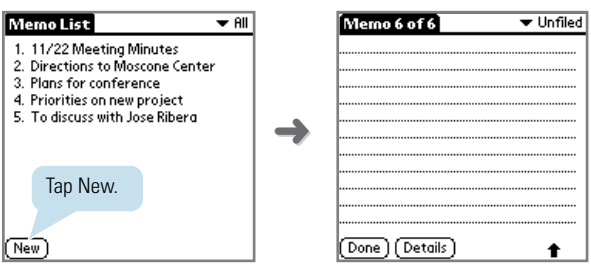
A record in the Memo Pad is called a memo. A memo can contain up to 4,000 characters. The number of memos you can store is limited only by the memory available on your Smartphone.

When you create a new memo, you can add information to it from the Address Book application, such as a phone number or address, using the Phone Lookup option. See "Using Phone Lookup" in Chapter x, "Common Tasks."

To create a new memo:

1. Open the Memo Pad application.

2. Tap New.



Tip: You can also create a new memo by beginning to write in the Graffiti writing area in the Memo List screen. The first letter is automatically capitalized and begins your new memo.

3. Enter the text you want to appear in the memo. Use the carriage return stroke to move down to new lines in the memo.

4. Tap Done.

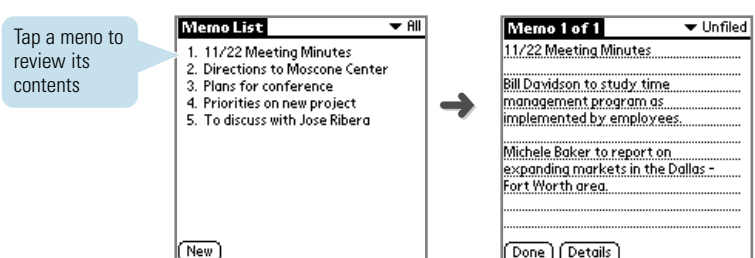
You can categorize memos and sort them by categories. See "Categorizing Records" and "Sorting Records" in Chapter x, "Common Tasks" for more information.

Reviewing Memos

The Memo List displays the first line of a memo. This makes it easy to locate and review your memos. You can easily sort memos in the Memo List or move through memos using Memo options.

To review a memo:

1. In the Memo List, tap the text of the memo.



2. Review or edit the text in the memo.

3. Tap Done.

To move through a memo you're reviewing:

1. In the Memo List, tap the text of the memo you want to review to it.

2. Tap the Menu icon in the lower left corner of the screen of your Smartphone to open the Memo Pad menus.

3. Tap Options.

4. Tap one of the following options to go to the beginning or end of the memo:

   - Tap Go to Top of Page to move to the top (first) line of the memo.
   - Tap Go to Bottom of Page to move to the bottom (last) line of the memo.

To change the order in which memos appear in the Memo List:

1. In the Memo List, tap the Menu icon in the lower left corner of the screen of your Smartphone to open the Memo Pad menus.

2. Tap Options.

3. Tap Preferences, and choose one of the following options:

   - Tap Manual to sort new memos in the sequence in which you create them.
   - Tap Alphabetical to sort new and existing memos in numerical and then alphabetical sequence.

4. Tap OK.

Making a Private Memo

You can designate a specific memo as "private." When you activate the Security features, you Smartphone hides all private entries and you must enter a password to display them on the screen.

To mark a memo as privated:

1. Tap the memo you want to mark as private to display it on the screen.

2. Tap Details to open the Memo Details dialog for that memo.

3. Select the Private check box.

4. Tap OK.

Deleting a Memo

There are three ways to delete a memo: simply delete the text of the memo, use the Menu Command (as described in the "Record Menu" section in this chapter)or use the Memo Details dialog.

To delete a memo with the Memo Details dialog:

1. Tap the memo that you want to delete to display it on the screen.

2. Tap the Details button to open the Memo Details alert.

3. Tap the Delete button to open the Delete Memo alert.

4. Tap the OK button to confirm that you want to delete the current memo.

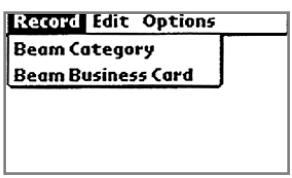
Memo Pad Menus

Memo Pad menus are shown here for your reference, and Memo Pad features that are not explained elsewhere in this book are described here.

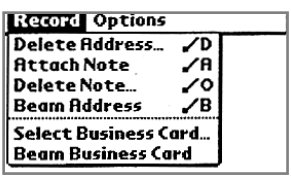
See “Using menus” in Chapter x for information about choosing menu commands.

The Record and Options menus differ depending on whether you’re displaying the Memo List or an individual memo.

Record menu

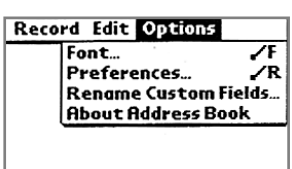


▲ Memo List

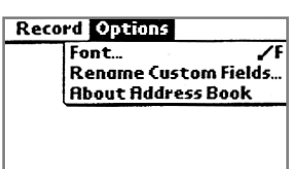


▲ Memo screen

Option menu



▲ Memo List



▲ Memo screen

11

CHAPTER11

To Do List

To Do List

The To Do List is a convenient place to create reminders and prioritize the things that you have to do.

Use the To Do List to:

- Make a quick and convenient list of things to do.
- Assign a priority level to each task.
- Assign a due date for any or all of your To Do List items.
- Assign To Do List items to categories so that you can organize and view them in logical groups. For more information, see "Categorizing records" in Chapter x, "Common Tasks."
- Sort your To Do List items either by due date, priority level, or category.
- Attach notes to individual To Do List items for a description or clarification of the task. For more information, see "Attaching notes" in Chapter x, "Common Tasks."

Opening the To Do List

Press the To Do List application button on the front panel of your Smartphone. To Do List opens to display the category of items you last viewed.

Note: Press the To Do List application button repeatedly to cycle through the categories in which you have items.

You can also open the To Do List by tapping the To Do icon in the Applications Launcher.

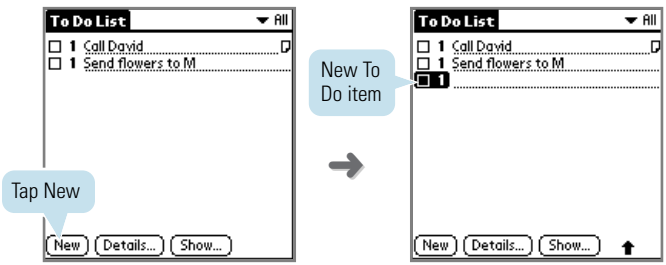
Creating To Do List Items

A To Do List item is a reminder of some task that you have to complete. A record in the To Do List is called an item.

To create a To Do List item:

1. Press the To Do List button on the front of your Smartphone to display the To Do List.

2. Tap New.



3. Enter the text of the To Do List item. The text can be longer than one line.

   Tip: You can add a name, address, and phone number to a To Do List item using the Phone Lookup option. For more information, see "Using Phone Lookup" in Chapter x, "Common Tasks."

4. Tap anywhere on the screen to deselect the To Do List item.

   Tip: If no To Do List item is currently selected, writing in the Graffiti writing area automatically creates a new item.

Setting Priorities

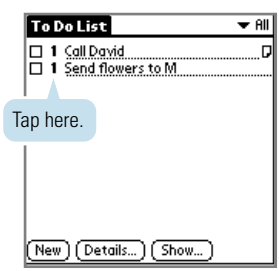
You can set priorities for tasks in your To Do List according to their importance or urgency. Items appear by priority and due date at the top of the To Do List by default, with 1 the highest priority. Changing an item's priority may move its position in the list.

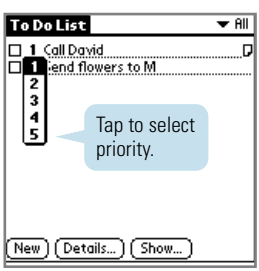
New To Do List items automatically have a priority of 1. If you select another item first, before creating a new item, the item you create appears beneath the selected item with the same priority as the selected item.

To set the priority lever for a To Do List item:

1. If priorities aren't visible in the To Do List, tap Show at the bottom of the list, tap Show Priorities, and tap OK.

2. Tap the Priority number on the left side of the To Do List item.





3. Tap the Priority number that you want to set, with 1 the most important and 5 the least important.

Checking Off To Do List Items

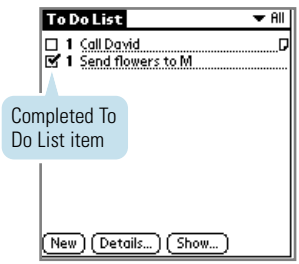
You can check off a To Do List item to indicate that you've completed it.

To check off a To Do List item:

1. In the To Do List, tap Show. Tap Show Completed Items. If you clear this setting, your To Do items disappear from the list when you complete (check) them.

   Note: Items that no longer appear on the list because Show Completed Items is turned off have not been deleted. They are still in the memory of your Smartphone. You must purge completed items to remove them from memory.

2. Tap the check box on the left side of the item.



Changing Priorities and Due Dates

You can change the To Do List to display the due date assigned to an item, change its priority, and assign a category to the task with the To Do Item Details dialog box.

You can then sort To Do List items by priority, due date, or category.

To change the priority and due date of a To Do List item:

1. In the To Do List, tap the item that you want to change.

2. Tap Details.

3. In the Details dialog box, tap No Date to open the Due Date pick list.

4. Tap the date that you want to assign the item. Options are Today, Tomorrow, One week later from the current date, No Date to remove the due date from the item, or Choose Date to display the date selector and select a date. tomorrow's date.

5. Tap Private to hide this item when Security is turned on. For more information, see "Making records private" in Chapter x, "Common Tasks."

6. Tap OK.

Tip: If you turn on the Show Due Dates option in the To Do Preferences dialog box, you can tap directly on the due date in the To Do List to open the pick list shown in step 2.

To sort To Do items:

1. In the To Do List, tap Show.

2. In the To Do Preferences screen, tap Sort By, and then select an option from the pick list:
   - Tap Priority, Due Date to sort items by priority first, and then due date. Tap Due Date, Priority to reverse that order.
   - Tap Category, Priority to sort items by category first, and then priority. Tap Priority, Category to reverse that order.

3. Tap OK.

Displaying Completed and Due Items

You can have the To Do List display completed items and their completion dates, as well as due items and their due dates.

To display completed and due items in the To Do List:

1. In the To Do List, tap Show.

2. In the To Do Preferences dialog box, choose from the following settings:

Show Completed Items	Displays your completed items in the To Do List. If this setting is turned off, completed To Do items disappear from the list, but are kept in the memory of your Smartphone. You must purge completed items to remove them from memory.
Show Only Due Items	Shows only the items that are currently due, past due, or have no due date specified. When this setting is active, items that are not yet due do not appear in the list until their due date.
Record Completion	Replace the due date with the actual date when you complete (check) the item. If you do not assign a due date to an item, the completion date still records when you complete the item.

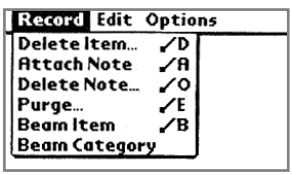
Show Due Dates Displays the due dates for items in the To Do List and to display an exclamation mark next to items that remain incomplete after the due date passes.

To Do List Menus

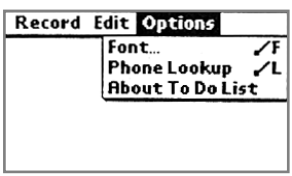
To Do List menus are shown here for your reference, and To Do List features that are not explained elsewhere in this book are described here.

See "Using menus" in Chapter 1 for information about choosing menu commands.

Record menu



Options menu



12

CHAPTER12

Exchanging and Updating Data Using HotSync® Operations

HotSync® technology lets you synchronize–exchange and update–data between one or more Palm Computing® connected phones and Palm™ Desktop software or another PIM such as Microsoft Outlook. To synchronize data, you must connect your Smartphone and Palm Desktop either directly, by placing your Smartphone in the cradle attached to your computer, or indirectly, with a modem or network.

The HotSync process automatically synchronizes data between your Smartphone and Palm Desktop software. Changes you make on your Smartphone or Palm Desktop software appear in both places after a HotSync operation. HotSync technology synchronizes only the needed portions of files, thus reducing synchronization time.

You can synchronize your data by connecting your Smartphone directly to your computer with the cradle or indirectly with a modem or network. This chapter describes how to select HotSync options and perform a HotSync operation via a modem or network.

See Chapter x, “Mail,” for information on performing HotSync operations via a modem or network.

Performing a HotSync Operation for the First Time

The first time you synchronize your data, you must enter user information on both the Smartphone and Palm Desktop software. After you enter this information and synchronize, the HotSync Manager recognizes your Smartphone and doesn't ask for this information again.

If you are a system administrator preparing several Smartphones for a group of users, you may want to create a user profile. See "Creating a user profile" later in this chapter before performing the following steps.

Important: You must perform your first HotSync operation with a local, direct connection, rather than using a modem.

The following steps assume that you have already installed the Palm Desktop software.

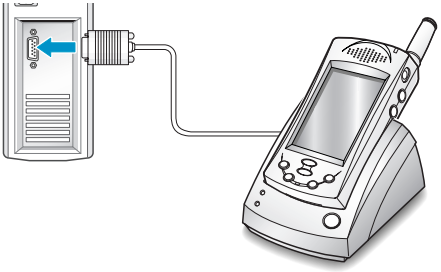
To perform a local HotSync operation:

The Cradle that comes with your Smartphone enables you to synchronize the information on your phone with the Palm Desktop software using the HotSync technology.

If you are planning to synchronize data between the Smartphone and your computer do the following:

1. Turn off the computer.
2. Plug the serial cable from the cradle into the serial communications(COM) port on your computer.

   Note: Your Smartphone requires a dedicated port. It cannot share a port with an internal modem or other device. If you are unsure about the exact location of the serial port on your computer, refer to the manual supplied with the computer.



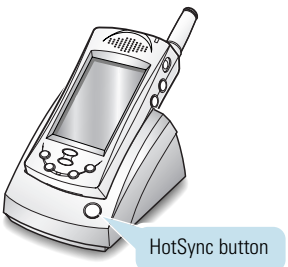
   The bottom edge of the Smartphone should align smoothly with the cradle when it is inserted properly.

3. Insert your Smartphone into the cradle.
4. Turn on the computer.

5. If the HotSync Manager is not running, start it:
   - On the Windows desktop, click Start, and then choose Programs. Navigate to the Palm Desktop software program group and choose HotSync Manager.
   - Alternatively, you can start the Palm Desktop software which automatically opens the HotSync Manager.

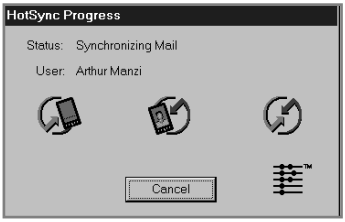
6. Press the HotSync button on the cradle.

   Note: If you are using an optional HotSync cable instead of a cradle, click the HotSync Manager icon ◯ in the Windows system tray and select Local from the menu.



7. If you are performing the HotSync operation for the first time, you must enter a user name in the New User dialog box and click OK. The HotSync Progress dialog box appears and synchronization begins.

   Every Smartphone should have a unique name. To prevent loss of a user's records, never try to synchronize more than one Smartphone to the same user name.



8. Wait for a message on your Smartphone indicating that the process is complete.

   When the HotSync process is complete, you can remove your Smartphone from the cradle.

Creating a User Profile

You can create a user profile to load data into an Smartphone without associating that data with a user name, using the File Link feature. This feature lets system administrators configure several Smartphones with specific information such as a company phone list before distributing them to their actual users. For more information on the File Link option, see “Using File Link” later in this chapter.

The User Profile feature is designed only for the first-time HotSync operation, before you assign a User ID to a particular Smartphone.

To create a user profile:

1. Open Palm Desktop software.

2. From the Tools menu, choose Users.

3. Click Profiles.

4. Click New. Enter a unique name for the profile, and click OK.

5. Repeat steps 3 and 4 for each profile that you want to create. When you have finished, click OK to return to Palm Desktop software.

6. Select the profile from the User list and create the data for the profile (for example, company phone list, and so on).

To use a profile for the first-time HotSync operation:

1. Place the new Smartphone in the cradle.

2. Press the HotSync button on the cradle.

3. Click Profiles.

4. Select the profile that you want to load on the Smartphone, and click OK.

5. Click Yes to transfer all the profile data to the Smartphone.

The next time you perform a HotSync operation, Palm Desktop software prompts you to assign a user name to the Smartphone.

Selecting HotSync Setup Options

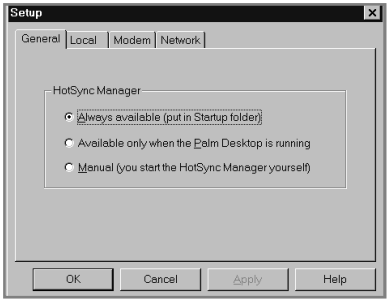
You can choose when you want HotSync Manager to run. If necessary, you can adjust the local and modem HotSync settings as well.

To set the HotSync options:

1. Click the HotSync Manager icon ◯ in the Windows system tray.

2. Choose Setup.

3. Click the General tab, and select one of the following options:



- Always Available adds HotSync Manager to the Startup folder and constantly monitors the communication port for synchronization requests from your Smartphone. With this option, the HotSync Manager synchronizes data even when Palm Desktop software is not running.
- Available Only When Palm Desktop software Is Running starts HotSync Manager and monitors requests automatically when you open Palm Desktop software.