



Intellisync Mobile Suite Client Guide

Palm OS Platform

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Setting Up Your Device

Options for installing Intellisync Mobile Suite

To install the Intellisync Mobile Suite software on your device, you have the following options for downloading the installation file to your device

- Access the installation Web site using your device and download the installation file wirelessly

Advantages

- This option is more convenient than physically connecting your phone to your computer.
- Your first synchronization session occurs wirelessly.

Disadvantages

- You may incur charges from your carrier when you send an SMS message and download the installation file.
 - The download could take several minutes, during which time you will not be able to make or receive phone calls.
 - You must synchronize wirelessly; you cannot initiate a synchronization session using a cradle or USB cable.
-

- Access the installation Web site using your PC and download the installation file through a USB cable or cradle

Advantages

- This option eliminates potential carrier charges.

Disadvantages

- Connecting your phone to your PC may not always be convenient.
-

Continue to [“Starting the installation process”](#) on page 8, which allows you to choose the installation method that best suits your needs.

Starting the installation process

To start the installation process from either your PC or device, complete the following steps:

1. Go to the URL provided by your system administrator. The Intellisync Mobile Suite Login page appears.
2. Enter your user name and password and click **Login**.
3. On the left navigation bar, click **Settings**. The Settings page appears.
4. Select **Add Sync Device**. The device selection page appears.
5. Select **Palm OS-Based Handheld** and select **Next**. The Install Software page appears.

To receive the installation file over the air, continue to [“Downloading the installation file wirelessly to your device.”](#) To download the installation file to your computer and install through a USB cable or cradle, see [“Downloading the installation file to a computer”](#) on page 9.

Downloading the installation file wirelessly to your device

To download the Intellisync Mobile Suite installation file wirelessly to your device, complete the following steps:

1. Select the **Carrier and Phone Number** option.
2. Select your wireless carrier from the list.

Note

If your carrier is not listed, select the Email Address option, enter the Internet e-mail address of your mobile phone, and then click Send Message. Continue to step 4.

3. Type the phone number of your device without parentheses or dashes, and then click **Send Message**.
A Web page appears with notification that a text message has been sent to your device. Verify that you received a text message on your device.
4. Select **Go To Msg** on your device. The text message you sent appears.
5. Open the text message on your device. A prompt appears, “Install /Select this link to install: <URL>.”
6. Select the installation URL link in the text message. The option to Install Software appears.
7. Select the **Install Software** link. The Download dialog box appears with a message, “Do you want to download?”
8. Select **Yes**. The Internet link downloads the installation file to the device.
9. Select **Save and open**. The Transfer dialog box appears with the message, “Do you want to accept into Applications folder?”
10. Select **Yes**. Intellisync Mobile Suite downloads the installation file to your device.

After downloading the installation file, you must initiate your first synchronization session. Continue to [“Completing an initial synchronization on your device”](#) on page 9.

Note

If you download Intellisync Mobile Suite to your device wirelessly, you cannot initiate a synchronization using a cradle or USB cable. To synchronize using Palm HotSync, you must download Intellisync Mobile Suite to your computer.

Downloading the installation file to a computer

To download the Intellisync Mobile Suite installation file to your computer, complete the following steps:

1. Connect your device to your USB cable or cradle.
2. Using Intellisync Mobile Suite on the Web, select **Install to PC**. The Install Software page appears.
3. Select the **Install Software** link. A file download dialog box appears.
4. Select **Run** to start the download process.
5. On the Intellisync Mobile Suite Installation screen, select **Install**. HotSync downloads the installation files to your device.

After downloading the software, you must initiate your first synchronization session. Continue to [“Completing an initial synchronization on your device”](#) on page 9.

Completing an initial synchronization on your device

After the downloading the installation file, you must initiate your first synchronization session. You can start your initial synchronization in two ways: wirelessly or by connecting to a cradle or USB cable and using Palm HotSync.

Synchronizing wirelessly

To start your first synchronization session on your device, complete the following steps:

1. Select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Sync** icon.

Note

A screen may prompt you to scribble on the screen to create a random number for encryption. Use your stylus to scribble on the screen until the installation begins.

Intellisync Mobile Suite is successfully installed on your device.

Synchronizing using Palm HotSync

To start your first synchronization session on your computer, complete the following steps:

1. Connect your device to the USB cable or cradle.
2. Select the **HotSync** icon on your device.

When the initial synchronization session starts, a dialog box appears with the initial synchronization session options:

Refresh. Replaces the data on your device with data from your company's server.

Merge. Combines data from your company's server with the data on your device. Selecting the Merge option may cause duplicate entries.

Note

A screen may prompt you to scribble on the screen to create a random number for encryption. Use your stylus to scribble on the screen until the installation begins.

3. Enter your password. The Intellisync Mobile Suite synchronizes the device with the PC, and then the Intellisync Mobile Suite main menu displays the status of the synchronized items.
4. On the Install Software Web page, click **Next**. The Configure Account screen appears.
Your Palm OS device appears in the Device Name list. Intellisync Mobile Suite is successfully installed on your device.

2 Using Your Synchronization Settings

Synchronizing your device

Intellisync Mobile Suite synchronizes your e-mail messages and PIM information on your device with your company's server. To synchronize your device, complete the following steps:

1. Select the **Intellisync** icon on your device. The Intellisync Mobile Suite main screen appears.
2. Select the **Sync** icon. The Sync Process dialog box appears.

When the synchronization session completes, Intellisync Mobile Suite main screen displays the status of the synchronized items.

Modifying your synchronization settings

If your administrator allows you to change your default synchronization settings, you can configure Intellisync Mobile Suite to suit your individual requirements.

Using What to Sync settings

You can modify settings to manage your synchronization sessions. Complete the following steps:

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **What to Sync**. The What to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable synchronization SyncMail folders (Inbox, Outbox, Sent, and Drafts) and PIM information (Calendar, Contacts, Tasks, Notes, and Travel Info).
4. Select **OK** to return to the Settings screen.

Modifying Mail - Inbox, Sent, and Drafts settings

Complete the following steps to modify each mailbox (Inbox, Sent Items, and Drafts) setting:

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **What to Sync**. The What to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:
 - Truncate after.** Enter the maximum number of characters to display for e-mail messages.
 - Sync Attachments.** Enable or disable attachments for e-mail messages.
 - Remove Older Than.** Enter the number of days to retain e-mail messages on your device. Based on your permissions, your administrator may have disabled this setting.
 - Max attachment size.** Enter the maximum size for attachments.
 - Only certain types of files.** Enter valid attachment types.
 - Overwrite with server data.** Enable setting to overwrite any device data with data from your company's server.
4. Select **OK** to return to the What to Sync screen, and then select **OK** to return to the Settings screen.

Using When to Sync settings

When to Sync settings allows you to select synchronization settings. To set up these options, complete the following steps:

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **When to Sync**. The When to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:
 - Push.** Automatically synchronizes e-mail messages and PIM information.
 - Timed Interval.** Select an interval from the list to indicate the frequency with which you want synchronization to occur.
 - Limit sync to.** Select the daily or weekday setting for synchronization.
 - Not Before.** Enter the time when synchronization will not occur before this time.
 - Not After.** Enter the time when synchronization will not occur after this time.
 - Disable if battery is less than.** Enter a percentage of battery life at which you want to disable synchronization.

4. Select **Advanced**. The Advanced screen appears. Modify the fields as necessary:
 - Use Network push.** Select this check box to automatically initiate a network connection.
 - Use SMS push.** Select this check box to automatically initiate a network connection when the device is powered off.
5. Select **OK** to return to the When to Sync screen, and then select **OK** to return to the Settings screen.

Guidelines for setting up Push options using your device

Use the following guidelines for setup and management of Push options. Because everyone has different levels of e-mail activity, settings for each person may vary. These guidelines help you determine the optimum setup for your conditions.

- Because your device synchronizes more often when you use the Push option, your device is powered-on more often. Adjust the power settings on your device to minimize battery drain.
- You may want to disable synchronization when battery power is below 20 percent.
- SMS-based Push relies on SMS messaging. Many service providers and carriers use a different billing structure for SMS messages. If you go over your allotted number of SMS messages within a billing period, you (or your company) may be charged additional fees. Check with your system administrator, department manager, or service provider to find out about SMS messaging restrictions.

Using notification settings

You can change the notification settings to manage your synchronization sessions.

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **Notifications**. The Notification screen appears.
3. Select or clear the following check boxes as necessary:
 - Notify when data received.** Enable or disable sounds and alerts.
 - Vibrate.** Enable or disable the device to vibrate when notification received.
 - Tones.** Enable or disable to use a tone when the device receives new data.
 - Volume.** Select a volume level for the tone.
 - Show Alert.** Enable or disable to show an alert when the device receives new data.

Using connection settings

You can modify the connection settings to manage your synchronization sessions.

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **Connection**. The Connection screen appears.
3. Modify the following settings as necessary:

User name. Enter a valid user name to access the server.

Server name. Enter the server address.

Connection. Select HotSync if you synchronize via a cradle or USB cable. Select Network if you synchronize wirelessly. To select your option for each synchronization, select Ask Each time.

Connection management. Select the connection type for the server.

Detailed Progress Screen. Select this check box to display detailed information during synchronization.

Note

Contact your system administrator for appropriate values before you modify any connection settings.

4. Select **Advanced**. The Advanced screen appears. Modify the fields as necessary:

Use proxy server. Select this check box to use a proxy server.

Address. Enter the address of the proxy server.

Port. Enter the port of the proxy server.

Bypass for local addresses. Select this check box to bypass proxy server with a local address.

Username. Enter the username of the local address.

Password. Enter the password of the local address.

Enable other sync apps. Select this check box to use other sync conduits such as Outlook or Palm Desktop.

5. Select **OK** to return to the Connection settings screen.

Using security settings

You can modify the connection settings to manage your synchronization sessions.

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Security** icon. The When to Sync screen appears.
3. Select the Not-Assigned field and set a password to access your locked device.
4. Select **OK** to save your password, and then select **OK** again to return to the Security screen.
5. Select **Done** to return to the Intellisync Mobile Suite main screen.

Note

To lock your device, select the Security icon, and then select Lock & Turn Off.

3 Using SyncMail

Using SyncMail






With Intellisync SyncMail, you can view and manage your e-mail messages. When you install Intellisync Mobile Suite to your device, SyncMail acts as the primary e-mail client.



Palm Mail and other Palm Mail-compatible clients do not work in conjunction with SyncMail.

Viewing e-mail messages

You can quickly view your e-mail messages, meeting requests, and attachments. To view your e-mail messages, select the **SyncMail** icon. The Email screen appears.

For each e-mail message, SyncMail provides the following icons to identify the message type:

Icon	Function
	Complete message.
	Truncated message. A truncated message appears when it is larger than the size restrictions in Mailbox settings. By selecting this icon, you can mark the e-mail message to download the full text during the next synchronization session. The icon then changes to the Message Marked for Download icon.
	Message selected for download. The e-mail message downloads during the next synchronization session.
	Meeting request.
	Attachment included.

Icon	Function
	Attachment(s) removed. An attachment is removed when it is larger than the size restrictions in Mailbox settings or does not match the file types listed in Attachment settings. By selecting this icon, you can mark the attachment to download during the next synchronization session. The icon then changes to the Attachment(s) Selected for Download icon.
	Attachment(s) selected for download. The attachment(s) downloads during the next synchronization session.






When you select on the icon located next to each e-mail message, you can select from a list of the following options:

E-mail Message Option	Function
Delete	Moves the e-mail message to the Deleted folder. SyncMail deletes all e-mail messages in the Deleted folder during the next synchronization session. These e-mail messages are removed from your device and your company's server. Note: You can also delete e-mail messages by pressing the Backspace button on your device.
Move To	Moves the e-mail message to a folder of your choice.
Mark Read	Marks the e-mail message as read.
Reply	Opens the Reply E-mail screen for you to enter a reply message to the sender.
Reply to All	Opens the Reply E-mail screen for you to enter a reply message to the sender and all other recipients of the e-mail message.
Forward	Opens the Forward E-mail screen for you to forward the e-mail message.
Get Message	Marks the e-mail message to download the full text during the next synchronization session. This option displays the Message Marked for Download icon next to the e-mail message.
Get Attachment(s)	Marks the e-mail message to download the full attachment(s) during the next synchronization session. This option displays the Attachment(s) Selected for Download icon next to the e-mail message.

Reading your e-mail messages




To read your e-mail messages on your device, select the message header. A screen appears with the body of the e-mail message.

To reply to an e-mail message, use the following icons at the bottom of the screen:

Icon	Function
	Delete message.
	Reply to sender.
	Reply to all.
	Forward.
	Create a new e-mail message.

Responding to meeting requests

When you select a meeting request, you respond by using the following icons located at the bottom of the screen:

Icon	Function
	Accept meeting request.
	Decline meeting request.
	Make tentative meeting request.

When you select an icon, a screen appears with a reply message with your meeting request response. Select Send to respond to the meeting request. The e-mail message is sent to the Outbox folder and transmitted to the sender during the next synchronization session.

Viewing attachments

If your e-mail message has an attachment, select the attachment name to view it.

SyncMail provides QuickWord and QuickSheet to view attachments. QuickWord supports document and text attachment types. QuickSheet supports spreadsheet and Comma-Separated Values (CSV) files. Other attachment types are supported if you install the appropriate viewers. These viewers must support Multipurpose Internet Mail Extension (MIME) files.

Creating e-mail messages

You can create e-mail messages on your device using SyncMail. To create an e-mail message, complete the following steps:



1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. Select the **New E-mail** icon at the bottom of the screen. The New Message screen appears.
3. Enter an e-mail address in the To: field.

Note

You may enter several e-mail addresses by separating them with a semi-colon.

4. Enter text in the optional Subj: field.
5. Enter your message in the e-mail body.
6. Select the **Save** icon. Your e-mail message is sent to the Outbox folder and transmitted during the next synchronization session.

When creating an e-mail message, you can also use the following icons at the bottom of the screen:

Icon	Function
	Ready Text. Select from a list pre-formatted text for quick responses for e-mail messages.
	Save message to Outbox. This e-mail message will be sent with the next synchronization.

Creating meeting requests

You can create meeting requests on your device using SyncMail. To create a meeting request, complete the following steps:

1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. Select the **New Meeting Request** icon. The Create Meeting screen appears.
3. Enter an e-mail address in the To: field.

Note

You may enter several e-mail addresses by separating them with a semi-colon.

4. Enter the necessary information for the meeting request.
5. Select **OK**. Your meeting request is sent to the Outbox folder and transmitted during the next synchronization session.

Managing e-mail preferences

You can configure SyncMail to suit your individual e-mail requirements regarding general settings and standard e-mail folders. The types of SyncMail preferences include the following:

General. These settings affect the general functionality of your e-mail messages.

Inbox. These settings affect the way you manage e-mail messages in the Inbox folder.

Outbox. These settings affect the way you manage e-mail messages in the Outbox folder.

Drafts. These settings affect the way you manage your e-mail messages in the Drafts folder.

Sent. These settings affect the way you manage e-mail messages in the Sent folder.

Deleted. These settings affect the way you manage e-mail messages in the Deleted folder.

Setting general preferences

SyncMail general preferences allow you to select settings for your e-mail messages. To set up these preferences, complete the following steps:

1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. From the **Options** menu, select **Preferences**. The Preferences screen appears.
3. Select the **General** tab, and modify the following fields as necessary:
 - When replying, include body leading text.** Select this check box to enter leading text before the body of each reply e-mail message.
 - Include signature.** Select this check box to enter a custom signature for each e-mail message.
4. Select **OK** to return to the Email screen.

Setting standard e-mail folder preferences

The SyncMail preferences allow you to select settings for e-mail messages located in the standard e-mail folders (Inbox, Outbox, Drafts, Sent, and Deleted). To set up these preferences, complete the following steps:

1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. From the **Options** menu, select **Preferences**. The Preferences screen appears.
3. Select the appropriate tab (Inbox, Outbox, Drafts, Sent or Deleted).
4. Modify the following fields as necessary:
 - Show Date/Time.** Select this check box to display the date and time of e-mail messages.
 - Show Size.** Select this check box to display the size of e-mail messages.
 - Show Multi-Select.** Select this check box to select multiple e-mail messages. This preference displays a check box beside each email-message for multiple selections.
 - Header.** Select the amount of header information to show for each e-mail message.
 - After Deleting a Message.** Select from the list what to display after deleting an e-mail message.
5. Select **Sync Settings**. The Mailbox Settings screen appears. These are the same mailbox settings that are available on the What to Sync settings screen.

