

Palm™ Desktop Software for Mac User's Guide

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Software Download Available

Palm™ Desktop software is supplied on a CD-ROM disc. If you do not have access to a CD-ROM drive for your computer, you can download the Palm Desktop software from www.palm.com.

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About This Book

Welcome to Palm™ Desktop software. This guide describes all you need to know about how to use Palm Desktop software with your handheld. It walks you through using the features of the four modules in the application, working with lists, finding information, printing from the application, and transferring data between Palm Desktop software and your handheld.

This guide is designed to help you get up and running quickly with Palm Desktop software. The first chapter introduces the application. The second chapter contains a tutorial that exercises the features of Palm Desktop software.

After you become familiar with the basic functionality, you can use the rest of this guide as a reference for less common tasks, and also as a source of information if you have problems operating Palm Desktop software.

In addition to this guide, Palm Desktop software contains online help that is available from the main menu bar and from the help button in dialog boxes. See online help for more detailed information about a function or task.

Introducing Palm™ Desktop Software

This chapter gets you started with Palm™ Desktop software and introduces you to some of its features.

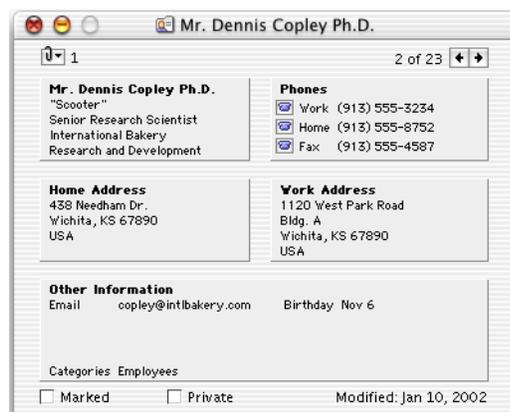
About the modules

Palm Desktop software has four modules: Address Book, Date Book, Memo Pad, and To Do List. You can add information to any module at any time. You can also connect, or attach, any record to any other, so you can jump right to the information you need.

The information from each of these modules is synchronized with the information in the basic applications on your handheld when you perform a HotSync® operation.

Address Book

The Address Book module keeps track of names, addresses, company information, telephone numbers, birthdays, e-mail addresses, web sites, and so on. You can attach any record to an address card. For example, you can create a To Do List item to call a client and attach this item to the client's address card so that all the information you need is available for the phone call.



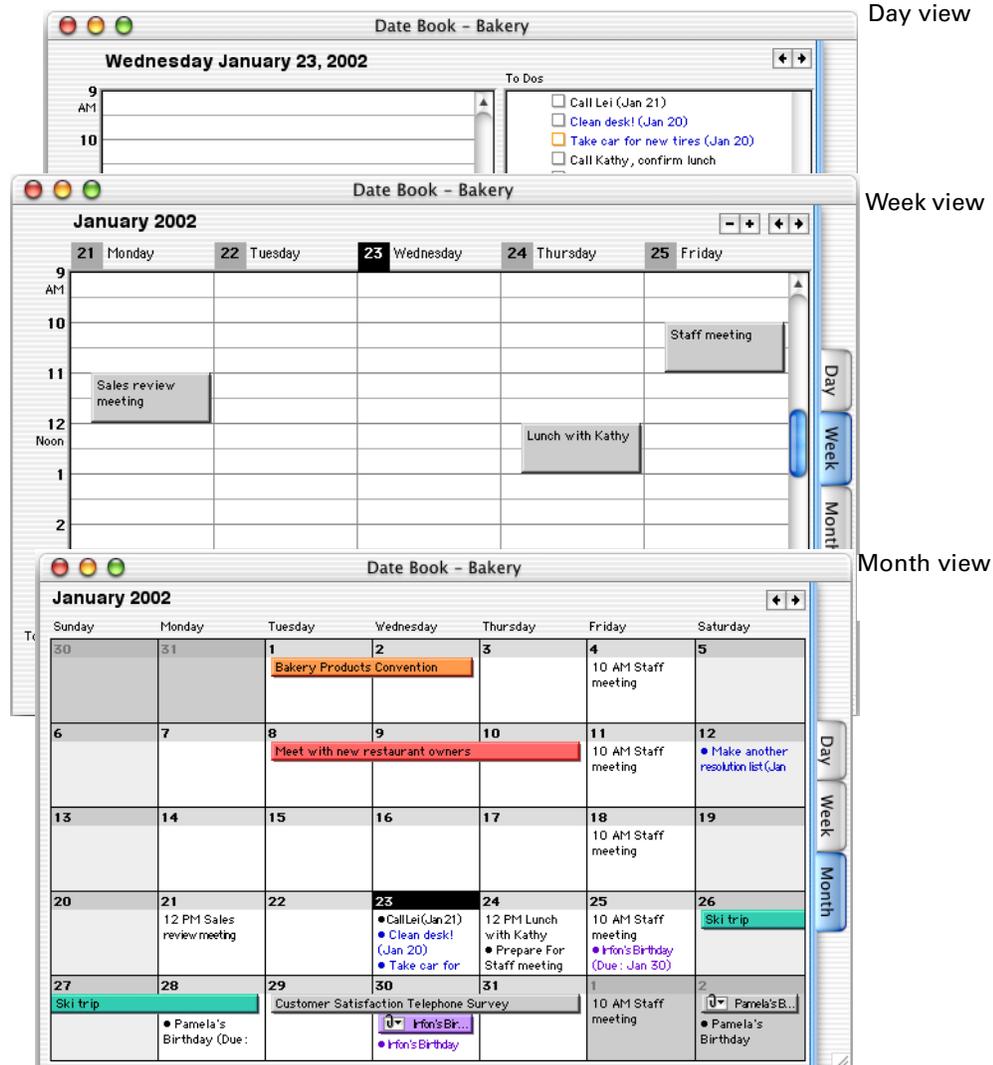
Example

To remind yourself to call a friend next week, create a To Do List item. Palm™ Desktop software automatically finds the address records that seem related to this To Do List item. For example, if you write “Call Jodie,” it will find all addresses containing the name “Jodie.” If you attach one of the addresses to the To Do List item, a paper clip pop-up menu icon  appears next to the To Do List Item. You can click the paper clip pop-up menu to open your friend’s address card.

Date Book

The Date Book module manages your appointments and events. You can choose among three views:

- Day
- Week
- Month



You can attach any record to a Date Book event. For example, you can attach a client's address card to an event so that you can quickly jump to this information if you need it.

You can set events to appear once, or repeat over an interval you set. You can create events to show special days, such as anniversaries, birthdays, and vacations. An event can span one day or several.

Example

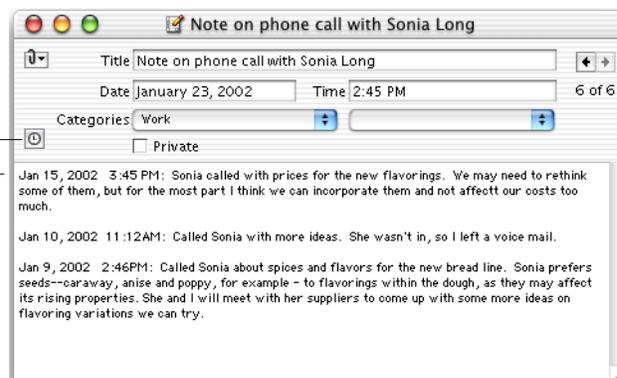
You created an event for an upcoming meeting. You can specify how far in advance of the meeting you want an onscreen alarm reminder to display. (Palm Desktop software does not need to be running for this alarm reminder to display.) For regularly scheduled meetings you can create a repeating event, so you need only type the item once. The rest of the events are created based on the repeat interval you specify.



Memo Pad

Create memos during telephone calls, meetings, or whenever you need to create a memo for yourself. You can attach a memo to any other record, including another memo. You can also add the date and time to a memo so you can keep an ongoing “log” of information, with the more recent items on top.

Click timestamp button...
...to place the current date and time on the first line of the memo



Example

While telephoning a business contact, you type a memo detailing the important points of the call. Click the timestamp button, and the current date and time appear on the first line of your memo.

To Do List

The To Do List module keeps track of your tasks, or “to-do” items. You can give a To Do List item a title, a date of completion, and a priority, and set the item to repeat over any duration you wish. To Do List items appear in Date Book, and you can attach a To Do List item to any address card or memo.



Example

You need to gather materials for a report due the last Friday of each month. You’d also like a reminder the previous Monday that it’s time to start preparing the report. You can create a To Do List item for this, and set the item to repeat on the last Friday of each month. You can also set the reminder for five days before, on the previous Monday, to remind you that it’s time to start working on the report.

Opening and quitting Palm Desktop software

Palm Desktop software stores your information in one data file on your computer. You can close, print, and delete this file as you would any other. When you start Palm Desktop software, it automatically opens the last file that was opened. The name of the file appears in the title bar of each Palm Desktop window.

To start Palm Desktop software, double-click the Palm Desktop icon in the Palm folder.

To quit Palm Desktop software:

- Mac OS X: From the Palm Desktop menu, choose Quit.
- Mac OS 9: From the File menu, choose Quit.

Using Palm Desktop software with your handheld

Palm Desktop software shares information with four built-in applications on your handheld: Address Book, Date Book, Memo Pad, and To Do List. The information is exchanged when you perform a HotSync operation.

The modules in Palm Desktop software provide more features than the applications on your handheld. For information about how your information is transferred to your handheld during a HotSync operation, see the chapters in this guide that describe each module.

The first time you perform a HotSync operation with a new handheld or one that has been hard reset, the following occurs:

- A username in Palm Desktop software is added to your handheld.
- A folder for the username is created in the Users folder inside the Palm folder. For example, if you entered Jane Garcia as your username, a folder called Jane Garcia is created in the Users folder. A file called User Data is created in the "Jane Garcia" folder. This is the data file that stores all your information.

NOTE Usernames appear in the User pop-up menu on the right side of the toolbar. You can change users by selecting a new name in the pop-up menu.

Each subsequent time you perform a HotSync operation, HotSync Manager reads the username from the handheld and synchronizes the data in the folder of the same name.

NOTE Be sure you select the correct username from the User pop-up menu before entering data on Palm Desktop or performing a HotSync operation.

Creating and opening user data files

When you first install Palm Desktop software, it creates a new data file, called User Data, in the folder with the username you specified during the installation. Each time you perform a HotSync operation with your handheld, this same data file is used to synchronize data.

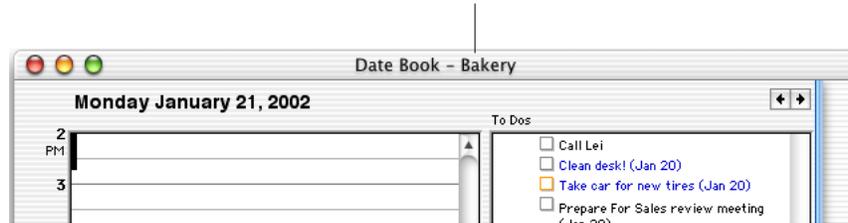
We recommend that you use only this data file to synchronize with your handheld. Create other files only to back up data or to hold information for another user on the same computer.

Opening existing files

Palm Desktop software automatically opens the last data file that was opened. To open another file, click the User pop-up menu in the toolbar and select a new username.

The name of the current data file appears in the title bar of each Palm Desktop window.

The name of the current data file appears in the title bar of each window



Saving files

Your changes are saved as you work. You can also save a copy of a file to use as a backup. From the File menu, choose Save a Copy. In the Save a Copy dialog box, be sure to rename the file (or the original file will be overwritten), and then click Save.

If you are working with a new file, choose Save As from the File menu. Type a name for the file.

Closing windows and files

You can have one file open at a time. To close a file, choose Close File from the File menu. If you close a new file, you are prompted to save it first.

To close a Palm Desktop window, click the window's close box or choose Close Window from the File menu. Closing a window does not close the file. Also, you can open multiple windows at the same time.

To exit Palm Desktop software, choose Quit from the File menu.

Changing your mind

If you make a mistake or change your mind while you are working, you can undo the latest change. To undo your most recent action, choose Undo from the Edit menu.

Using templates

If you have a number of similar events, addresses, memos, or To Do items to type, templates can help make your work easier.

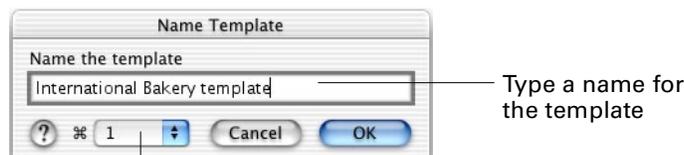
A template resembles a new item, except it already contains some pretyped information. When you create a template, you choose what pretyped information, and how much, is in it.

For example, if you have to add addresses for ten people and they all work in the same location, you can create a template that includes company name, address, and other information common to the new entries.

You can create a template either from an existing event, address, memo, or To Do List item—or from a new one. Once a template has been created, it appears in the Create menu, and you can use it to make new items. You then type only whatever remaining information the new item requires.

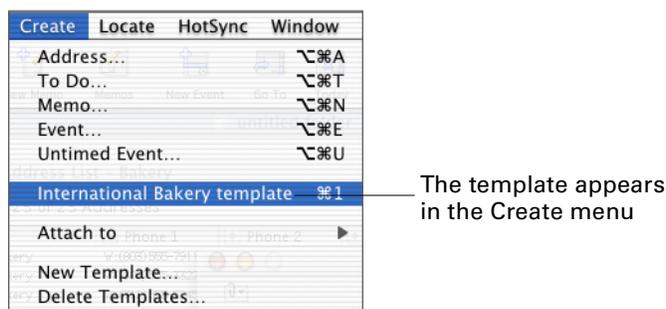
Creating templates from existing items

You can create templates from existing events, addresses, memos, or To Do List items. Select the item, then choose New Template from the Create menu. Give the template a name, and assign it a keyboard shortcut if you like. Then click OK. A keyboard shortcut is a sequence of keys that, when pressed together, are a faster way to execute a menu command than using the mouse.



Click the pop-up menu to assign the template a keyboard shortcut (optional)

The new template is available in the Create menu. Choose it, and a dialog box for a new item of its type appears with the template information filled in.



Creating templates from new items

You can create templates from new events, addresses, memos, or To Do List items. Choose Event, Address, Memo, or To Do from the Create menu. Type the information you want the template to have. Choose New Template from the Create menu. Give the template a name, and assign it a keyboard shortcut if you like. Then click OK.

The new template appears in the Create menu. You can continue to create other new items with the information contained in the new template.

Changing a template

If you need to correct the information in a template, create a new one, and then delete the old one.

Deleting templates

To delete a template, choose Delete Templates from the Create menu. Select the template you want to remove, then click Delete. Click Done when you've finished deleting templates.

Using the toolbar

You can click the buttons on the toolbar instead of choosing menu commands to execute common actions.

By default, the toolbar displays each button's name. Move the pointer over the button to see an explanation of the button's function. If you have a small monitor, you can collapse the toolbar, which hides button names. To do this, click the triangle at the left side of the toolbar.

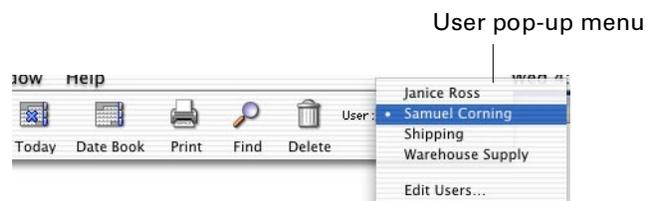


To move the toolbar, hold the mouse down on the background of the toolbar and drag the toolbar to a new position. If you drag the toolbar near the menu bar, the toolbar automatically snaps back into the docked position.

To hide the toolbar, choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9. Click the General button, and then choose None from the Toolbar pop-up menu.

Switching between users

The User pop-up menu is on the right side of the toolbar.



If you are the only person using Palm Desktop software on this computer, your name is the only name you see.

If others use the computer, the User pop-up menu shows the name of the person who most recently used it.

NOTE Always check the pop-up menu to be sure you are using the correct data, especially before performing a HotSync operation.

Click the User pop-up menu to do the following:

- Select from a list of available users and profiles
- Create, delete, or modify users and profiles

Marking records private

You can mark any record private. Then, depending on whether you select to show or hide private records in Preferences, Palm Desktop software either displays or hides the records. To mark a record private, open the record, select Private, and click OK.

When you transfer a private record to your handheld during a HotSync operation, the record may become hidden or masked, depending on the options you select in your handheld's Security application.

NOTE Masking of private records is available only on handhelds using Palm OS[®] software version 3.5 or later.

Hiding private records

You can hide all records that are marked private. Hidden records do not display in list views, Date Book views, menus, or Instant Palm Desktop application. They do not print and are not exported. The alarm for a hidden Date Book event does go off, but onscreen the alarm reminder says "Private Event" and does not display the actual event description. Hidden records are synchronized during HotSync operations.

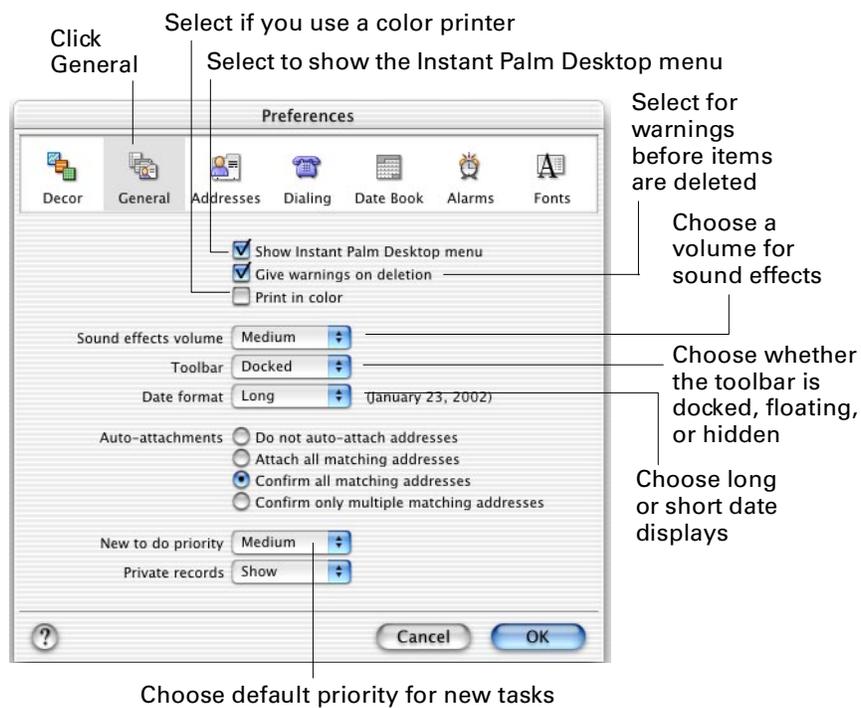
To hide private records, choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9. Click the General button, and select Hide.

Setting preferences

To set preferences, choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9.

Setting general preferences

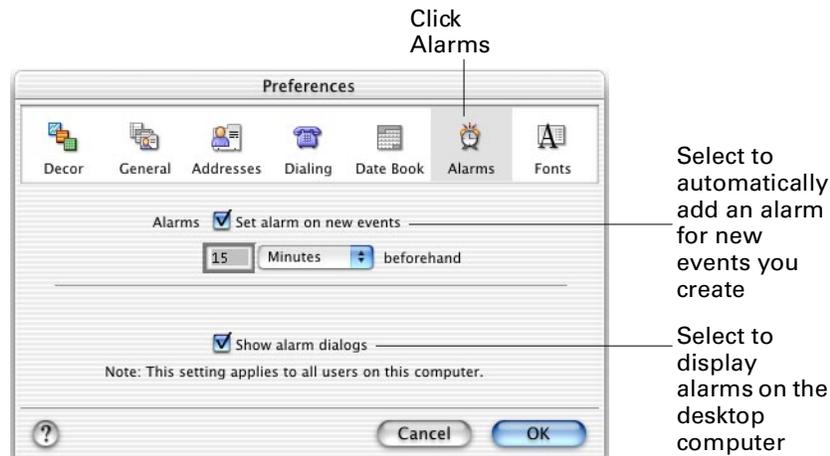
Use the General preferences panel to specify settings for the Instant Palm Desktop menu, deletion warnings, color printing, sound effects volume, toolbar, date format, auto-attachments, new To Do List item priority, and private records.



For information on setting auto-attachment preferences, see [“Setting attachment preferences”](#) in [Chapter 9](#).

Setting alarm preferences

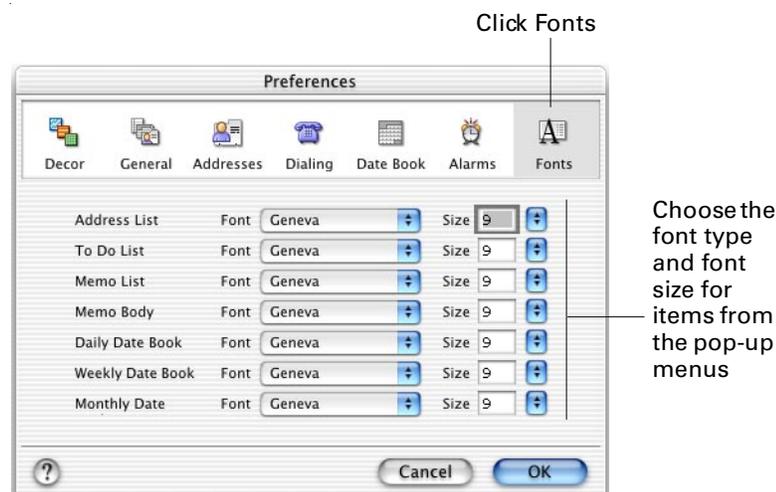
You can set the alarm preferences for your computer in Palm Desktop software. Choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9, and then click the Alarms button.



The alarms for each appointment are set in the Event dialog box.

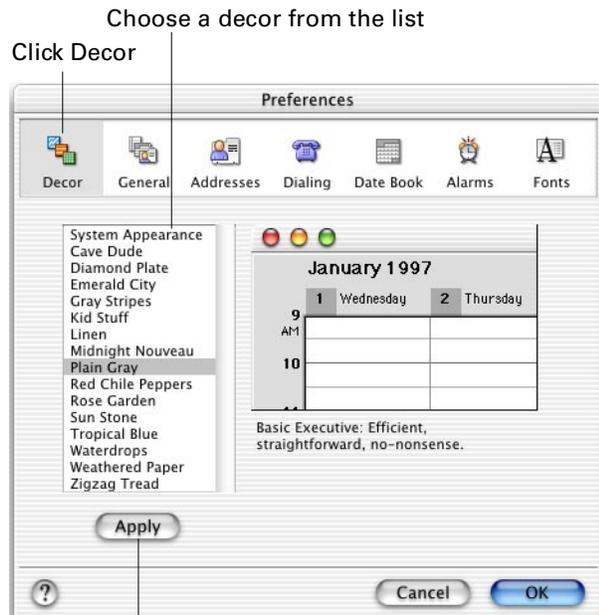
Setting font preferences

You can set different font types and font sizes for the list views in Address Book, To Do List, and Memo Pad. You can also select fonts and font sizes for memo text and the Date Book views. Choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9, and then click the Fonts button.



Setting decor preferences

A decor is a background that you can apply to the onscreen appearance of Date Book views and the list views in the other modules. To set a decor, choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9, and then click the Decor button.



Select a decor from the list, and then click the Apply button to see how the decor looks with your file. Click OK to accept the decor or Cancel to reject it.

Calendar with the Red Hot Chilies decor



NOTE Decors appear onscreen only; they do not affect printing.

Adjusting memory in Mac OS 9

In Mac OS 9, your computer sets aside a certain amount of memory for each application. You can change the amount of memory reserved.

You may want to increase the amount of memory set aside for the Palm Desktop software if you run out of memory while using the application, or if you have a very large data file. Increasing the preferred memory size to 5000K should eliminate any memory problems during these operations. If you use a Power Mac and have virtual memory off, Palm Desktop software requires more memory.

NOTE If you run out of memory while performing a HotSync operation, increase the allocation for the Conduit Manager application, not Palm Desktop software. The Conduit Manager is the application that manages HotSync operations. It is located in the Palm folder.

To change the memory allocation:

1. If Palm Desktop software is open, quit the application.
2. Open the Palm folder.
3. Click the application icon once.

To change the memory allocation for Palm Desktop software, click the Palm Desktop icon. To change the allocation for Conduit Manager, click the Conduit Manager icon.

NOTE If you click the application icon twice, you start the application. If that happens, choose Quit from the File menu and try again.

4. From the File menu, choose Get Info.
5. In the Get Info dialog box, choose Memory from the Show pop-up menu.
6. Double-click the Preferred Size box.

You see the size highlighted in the box.

7. Type a number, such as 5000, to change the memory size.
8. Close the Palm Desktop Info window.

The next time you start Palm Desktop software, the amount of memory you specified is available for the application.

For more information on managing memory, refer to the documentation that came with your computer.

With Palm™ Desktop software and your handheld, you can keep track of names, addresses, telephone numbers, e-mail addresses, events, memos, and to-do lists.

If you like to roll up your sleeves and learn by doing, this tutorial is for you. After you finish it, you will have a solid understanding of how Palm Desktop software works.

In this tutorial, you are the owner and manager of International Bakery, Ltd. You sell baked goods to delicatessens, cafés, and homes. Your business is growing nicely, and you need to keep track of information about your customers, suppliers, personal life, and family, so nothing gets overlooked. You carry your handheld on calls to customers and to suppliers.

After you have installed Palm Desktop software, you need to open the tutorial file.

1. Find the file called Bakery in the Tutorial folder, which is in the Palm folder.
2. Double-click the file's icon .

The file opens.

Next, you need to go to the place in the file where the calendar information is.

1. Click the Go To button  on the toolbar, at the top of the screen.
2. Type 1/1/02 in the box.
3. Click OK.

Now, let's put the software to work!

Creating an item in Address Book

The moment you finish installing the software the telephone rings, and it's Susan Kenwood, a new customer. The first thing to do is create an address card for her.

1. Click the New Address button  on the toolbar.

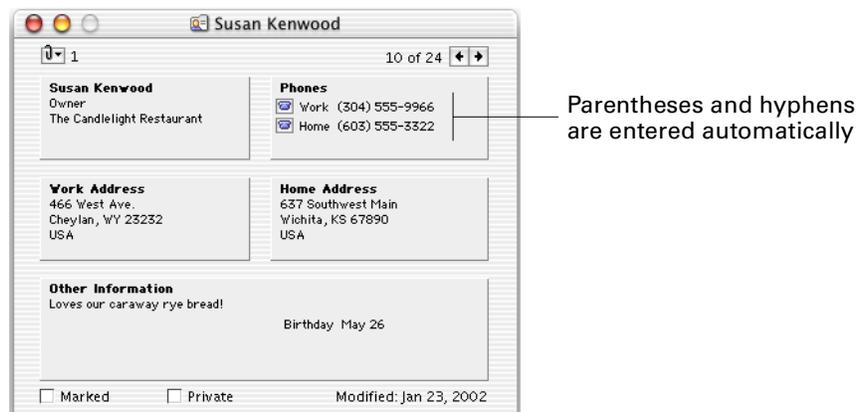
A new address card appears where you can type the customer's information.

2. Notice the Name section of the card is expanded to make typing easier. Also, the First field is selected.
3. Type the first name: Susan.
4. Tab to the Last field, and type the last name: Kenwood.

Tips:

- You can move from field to field by pressing Tab (or press Shift-Tab to go backwards).
- Press Enter or Return repeatedly to open and close successive sections.
- If you prefer, you can simply click the field you want to type in. The section expands and the field highlights, ready for you to type.

Finish typing the information so the address card looks like the one below. For telephone numbers, you need only type the digits—the parentheses and hyphens are added automatically. Press the Enter key when you're through, but don't close the address card yet — we'll assign a category to it.

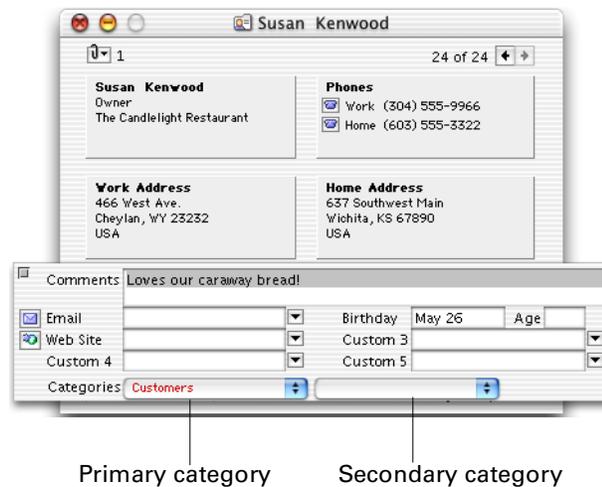


Assigning a category

After you're done with the address card information, you'll want to assign a category to this card. Categories are an easy way to group addresses, events, memos, and To Do List items. For example, you can assign the category "Office" to the addresses for your coworkers, as well as events, memos, and To Do List items relating to them.

You can assign up to two categories to each item: a primary category, and a secondary category. The primary category is the pop-up menu on the left; the secondary category is the one on the right. You can use primary and secondary categories however you choose.

NOTE Only the primary category for a record is transferred to your handheld when you perform a HotSync® operation.



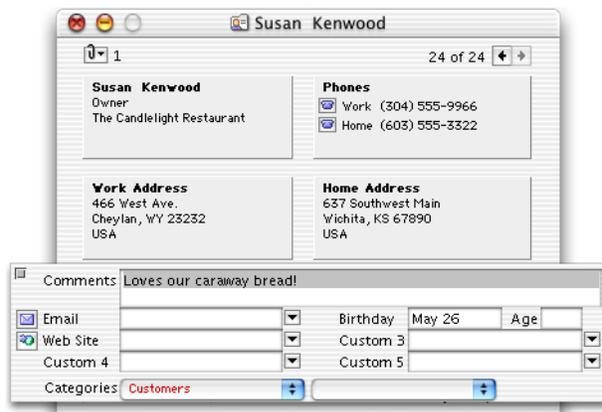
You can easily assign color-code information. For example, you can have items with the category “Office” appear in blue, and items with the category “Friends/Family” appear in green. The color of an item is based on its primary category. If you have a color printer and have selected the correct print options, color-coded items will print in color, too.

Eight categories are already created, and you can add, remove, or change them at any time.



NOTE The tutorial includes some additional categories.

1. Click the Other Information section of Susan Kenwood’s address card to expand it.
2. Choose Customers from the left, or primary, Categories pop-up menu.



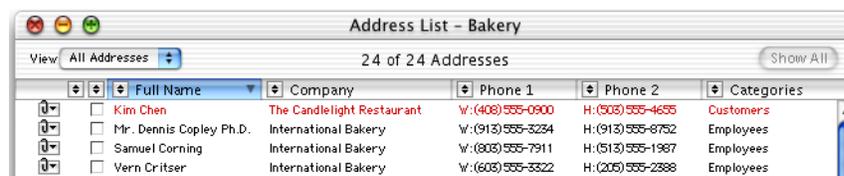
3. You can choose another category from the right, or secondary, Categories pop-up menu. Otherwise, leave it blank.
4. If you like, fill in some of the other fields on Susan's address card.
5. When you're done, press Enter to collapse the open section.
6. Click the card's close button  in the upper-left corner to put it away.

Displaying list views

The address card is a good way to view and change one person's information. But you've got a lot of people in your Bakery file. To scan them, or jump quickly to another person's card, view your addresses as a list.

1. Click the Addresses button  on the toolbar.

You see the addresses listed in rows and columns.



2. Choose an item in the list, and double-click it to open the address card.
3. Click the address card's close button in the upper-left corner to put it away.
4. Click several items in the list as you hold down the  key.

- Click an item toward the top of the screen. All the previously selected items are now unselected. Press and hold the Shift key. Now click an item five or six lines below the first one you clicked. The two items you clicked, plus all items in between, become selected.



- To deselect all addresses, scroll down to the bottom of the list, where there are no items. Click there. All items are deselected.

There are three separate list view windows: one for addresses, one for memos, and one for To Do List items. All three work the same way. You can enlarge any list view window—or scroll up, down, left, or right—to see all of your data.

You can attach, delete, and duplicate multiple items quickly in a list view by selecting more than one item at a time.

Leave the address list open—we’ll use it in the next section.

Sorting items in Address Book

Right now, your address list is sorted by name. Some operations may be easier if it were sorted by company.

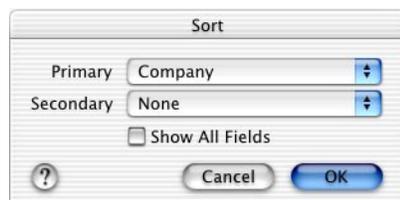
- Find the Company column in the address list. Scroll left or right if you need to.
- Click the word Company at the top of the column. (Don’t click the  button next to it.)

This re-sorts the list so all items are now sorted by company. Notice that the word Company is highlighted. Highlighting indicates which field was used to sort the information.



You decide it would be more convenient if the information were sorted by company, and then by name within each company.

- Choose Sort from the View menu.
 - In the Sort dialog box, Company appears in the Primary pop-up menu.
- Choose Full Name from the Secondary pop-up menu.
- Click OK.



In the address list, notice the dotted underline beneath the Full Name, indicating that it is the secondary sort column.

We'll continue using the address list in the next section, so leave it open.

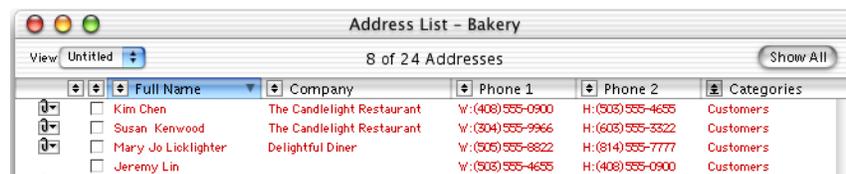
Viewing selected items in Address Book

You want to take a quick look at your customers' address cards. But there are many more records in your file than just those for your customers. You want to show the listings for only your customers—while hiding the others.

You can set the Categories field so you see only customers. This setting is called a filter.

1. If the address list is not already open, click the Addresses button  on the toolbar.
2. Click the  button next to the word Categories at the top of the categories column.
3. Choose Customers from the pop-up menu.

The list now shows only your customers.



Let's show the rest of the Address Book records again.

1. Click the  button next to the word Categories at the top of the categories column.
2. Choose No Filter from the pop-up menu.

The entire set of Address Book items is visible again. If you prefer, you can also show the hidden items by clicking the Show All button in the upper-right corner of the list window. (If you're already viewing all the items this button is not available.)

You can close any open windows by clicking each window's close button in the upper-left corner.

Finding an Address Book item

Later in the day, you want to call Susan Kenwood, and you need her telephone number.

1. Click the Find button  on the toolbar.
2. Click the Addresses button  inside the Find dialog box. Make sure Display Results in List Window is deselected.
3. Type Kenwood in the text box.

Her address appears in the dialog box—probably before you even finished typing her last name.



4. Double-click Susan Kenwood's name in the Find dialog box, and you see her address card.

After you've found Susan Kenwood's address card, you can click the telephone icon  next to her telephone number to dial her phone number automatically, if you have the correct modem and telephone connections.



5. Close the address card.

You can also find other information in a similar way, whether it's a To Do List item, memo, or an event. If you don't know where to look for the information, click Entire File to list every place the information appears.

Synchronizing addresses with Address Book on your handheld

After you add or change addresses, you can make sure your handheld has the same information by performing a HotSync operation. The HotSync operation exchanges new material between Palm Desktop software and your handheld and updates all changes made in either location. For example, the address you created for Susan Kenwood would appear on your handheld in the Address Book application after a HotSync operation.

This tutorial doesn't step through a HotSync operation. Instead, you can learn about HotSync operations using your own data by reading "[About HotSync operations](#)" in [Chapter 12](#).

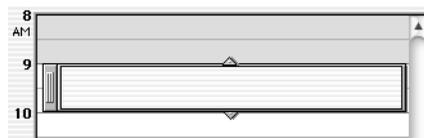
Creating an event in Date Book

Next, you need to schedule an appointment you've made with the representative from your bakery supplies wholesaler. You're going to discuss new spices for your international line of breads. The appointment is tomorrow, from 9 AM to 10 AM.

1. Click the Date Book button  on the toolbar.
If you don't see the Day view, click the Day tab on the right side of the window.
2. Click the Go To button  on the toolbar.
3. In the Go To dialog box, click the arrows  either backward or forward until you see January 2002.
4. In the Go To dialog box, choose any day in January 2002 for the appointment, click it, then click OK.

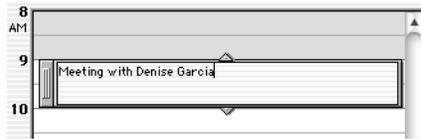
You'll see that date in the Day view.

5. Scroll up or down until you see 9 AM in the events window, on the left side of the Day view.
6. Move the pointer to the events window. The pointer becomes a crosshair.
7. Place the crosshair on the line representing 9 AM, then click and drag down until the box reaches 10.



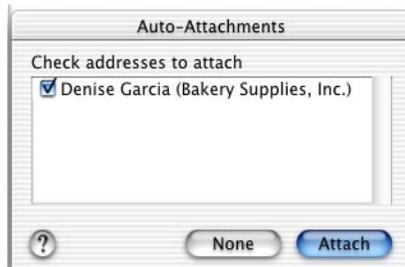
A one-hour event is created, from 9 AM until 10 AM.

- Type Meeting with Denise Garcia inside the new event box.



- Click outside of the event box to deselect it.

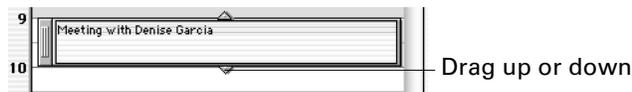
The Auto-Attachments dialog box appears. There is an address card for Denise Garcia, and you can attach it to this event.



- Click Attach.

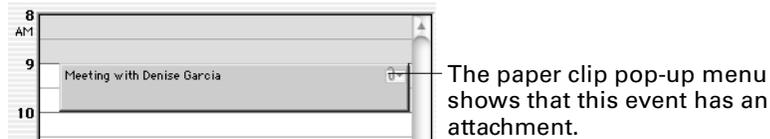
We'll discuss attachments in more detail later, in the ["About attachments"](#) section.

To change the start or end time of an event, click the event to select it. Drag the upper arrow up or down to change the event's start time. Drag the lower arrow up or down to change the event's ending time.



If you prefer, you can also change the event start or end time by double-clicking the event, then changing the time in the Event dialog box.

Click outside of the event to deselect it.

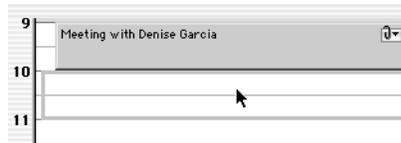


Leave the Day view open for the next section.

Moving an event

Unfortunately, Denise Garcia just called you to say she has an appointment conflict. She asks that the meeting you've scheduled be changed to 10 AM. You need to move the event in Date Book.

1. Move the pointer over the event.
2. Drag the event downward so the top of the event lines up with 10 AM.



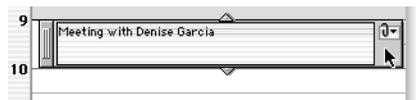
The event now starts at 10 AM and ends at 11 AM.

You can also change the time in the Event dialog box, if you prefer. Drag the event back up to where it was, so that it starts at 9 AM and ends at 10 AM. Now practice moving the event using the Event dialog box.

1. Click the event once, so it becomes selected.



2. Double-click the event box anywhere except directly over the event text.



3. When the Event dialog box opens, change the beginning time from 9 AM to 10 AM. You can type 10.



4. Click the box for the ending time. It automatically changes to 11 AM.
5. Click OK to close the dialog box.

The next thing we're going to do is confirm that we have set a reminder, or alarm, for this event.

Setting alarms

You're not sure you'll remember that the appointment with Denise Garcia has been changed, so you want a reminder shortly before it is to occur. You can set an alarm for this event. An alarm is a dialog box that appears on your computer screen to remind you of an event. When you synchronize data with your handheld, the alarm is also set to go off on your handheld.

The default setting for alarms on Palm Desktop software is off. If you wish to be reminded by these onscreen alarms, you must turn on the alarm setting.

NOTE This setting affects all users on Palm Desktop software.

1. Choose Preferences from the Palm Desktop menu on Mac OS X or from the Edit menu on Mac OS 9.
2. Click the Alarms button  in the Preferences dialog box.

Click Alarms



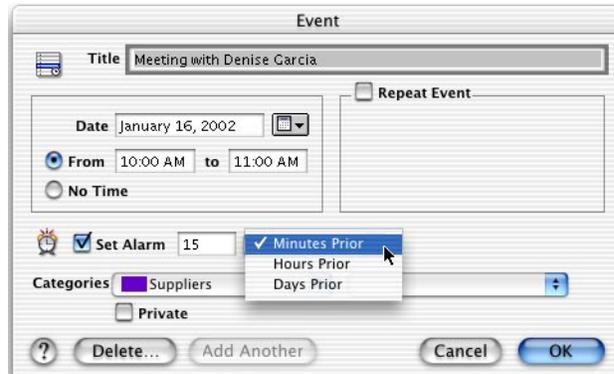
3. Select the check box for Show alarm dialogs.

NOTE You can change the alarm settings for an individual event in the Event dialog box.

4. Click OK.

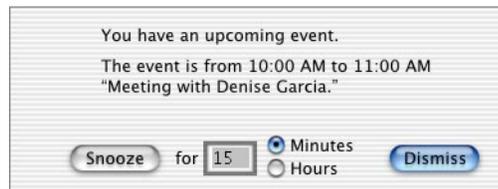
You want to set this alarm to go off at the original time of the event (9 AM) to remind you that the event changed.

1. Double-click the Denise Garcia event box anywhere except directly over the event text.
2. In the Event dialog box, make sure the Set Alarm check box is selected.



3. Type 60 over the existing number in the box.
4. Leave Minutes Prior selected in the pop-up menu.
5. Click OK.

At 9 AM the following dialog box appears.



If you want another reminder later, type when you want that reminder to appear, then click Snooze.

Try setting up your own reminder:

1. Check your computer's current date and time settings. (If you're not sure how to do this, or you need to correct them, consult your computer operating system's user guide.)
2. Click the New Event button  on the toolbar to create a new event.
3. Make the event for today's date.
4. Check the current time, then set the start time of the event for fifteen minutes from now. (The end time can be whatever you like.)
5. Set an alarm to warn you ten minutes in advance.
6. Click OK.

Within five minutes you should see a reminder on your screen.

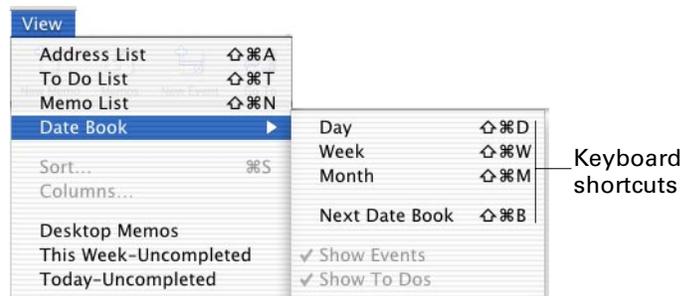
When you're through experimenting with reminders, you can close any open windows if you like.

Showing the three Date Book views

The Date Book has three views: Day, Week, and Month. First, let's try the three ways to choose one of these views. Then we'll examine the differences among the views.

To switch among the three Date Book views:

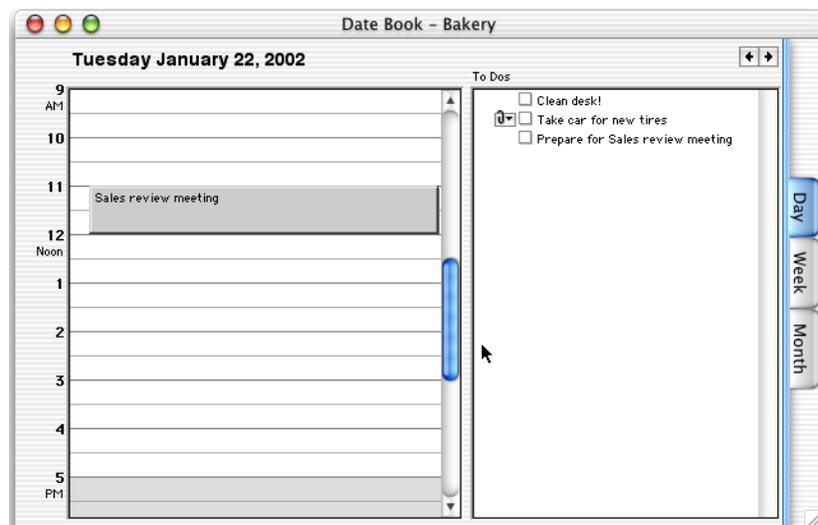
1. Click the Date Book button  on the toolbar repeatedly, until you have seen each view.
2. Click the tabs on the right side of the Date Book until you have seen each view.
3. Choose Date Book from the View menu, and then choose one of the three views from the submenu. (You can also use the keyboard shortcuts that are listed in the menu.)



The three Date Book views offer you different ways of looking at your schedule.

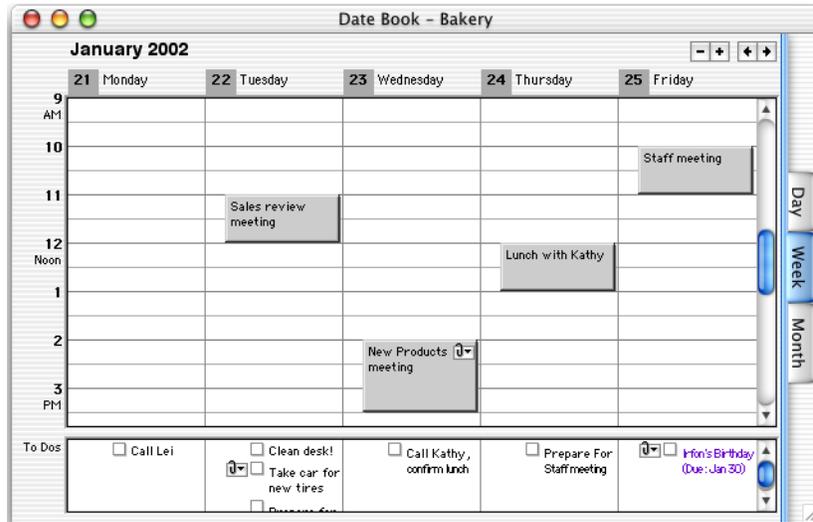
- The Day view shows one day's event and To Do List items. On the left, you see events. The window scrolls to reflect the time of day. On the right, you see the day's To Do List.

Day view



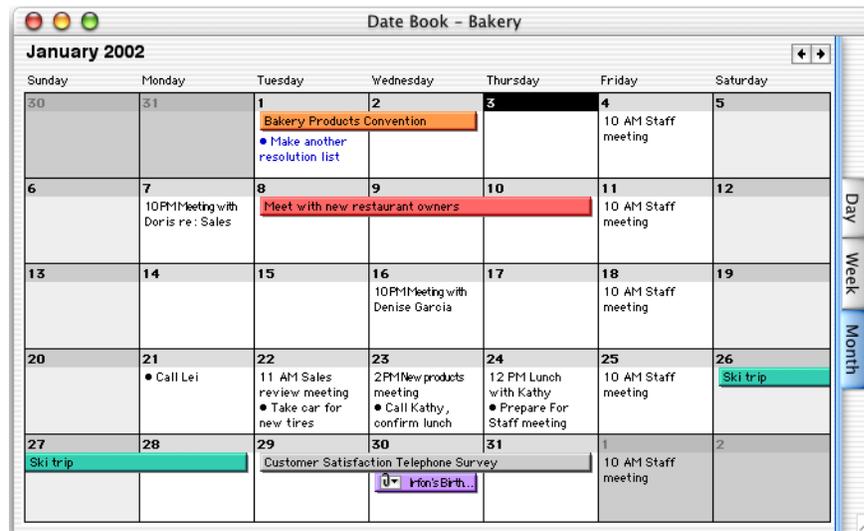
- The Week view shows events and To Do List items for a number of days you choose, from one to seven. Events are listed on top, while To Do List items are listed beneath each day. You can click the + and - buttons to change the number of days displayed—from one day to as many as seven.

Week view



- The Month view shows the current month's events and To Do List items.

Month view



Leave one of the Date Book views onscreen for the next section.

Creating an untimed event

National Bread Week is coming up! You must note this event on your Date Book as an untimed event.

1. Go to the Month view for January 2002.
2. Click the New Event button  on the toolbar.
3. For the event's name, type National Bread Week.



4. Type 1/20/02 in the Date box. (This is the event's start date.)
5. Click No Time.
6. Click the Repeat Event check box to select it.
7. Type 1/26/02 in the Until box so the event spans an entire week.
8. Choose Business from the primary Categories pop-up menu on the left.
9. Click OK.

An untimed repeating event appears on the Date Book.

20	21	22	23	24	25	26
National Bread Week						
	• Call Lei	11 AM Sales review meeting • Take car for	2PM New products meeting • Call Kathy	12 PM Lunch with Kathy • Prepare For	10 AM Staff meeting	Ski trip

Notice that the event can stretch over more than one day. (You can also have an event that only stretches across one day.) You can reposition the event or change its duration.

10. Double-click the event.
11. In the Change Repeating Item dialog box, make sure that All Events is selected and then click OK.
12. When the Event dialog box opens, change the date in the Until box to 1/23/02. Click OK. Notice that the event has been shortened by two days.
13. Double-click the event again, and change the date in the Until box back to 1/26/02. Click OK. The event once again spans the entire week.

- Click the event and drag it to another week.

13	14	15	16	17	18	19
			10 PM Meeting with Denise Garcia		10 AM Staff meeting	
20	21	22	23	24	25	26
National Bread Week						
	• Call Lei	11 AM Sales review meeting • Take car for	2 PM New products meeting • Call Kathy	12 PM Lunch with Kathy • Prepare For	10 AM Staff meeting	Ski trip

The untimed repeating event now spans that week.

Close Date Book if you like.

Synchronizing events with the Date Book on your handheld

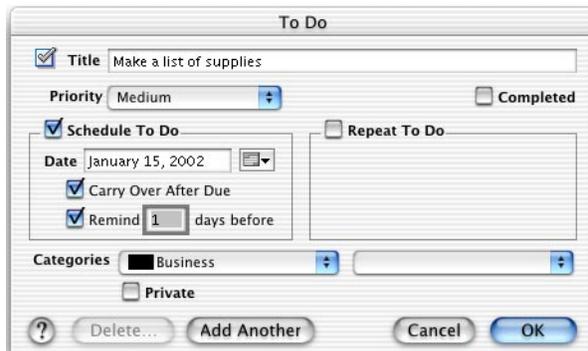
A HotSync operation exchanges new events between Palm Desktop software and your handheld and updates all changes to events made in either location. For example, the event you made for 10 AM with Denise Garcia would appear on your handheld in the Date Book application after a HotSync operation.

This tutorial doesn't step through a HotSync operation. Instead, you can learn about HotSync operations using your own data by reading "[About HotSync operations](#)" in [Chapter 12](#).

Creating a To Do List item

Your appointment with your bakery wholesaler is the day after tomorrow. Before the appointment, you need to make a list of the spices and bakery supplies that you need. You want to remind yourself to complete this task before the appointment.

- Click the New To Do button  on the toolbar.
- In the Title text box, type Make a list of supplies.



- Leave the Priority at Medium.
- Make sure the Schedule To Do check box is selected.
- Type 1/15/02 in the Date field.

6. Leave Carry Over After Due selected.
7. Select the Remind check box and type 1 in the days before box that appears.
This reminder occurs only on Palm Desktop software; the handheld doesn't support reminders on To Do List items.
8. Choose Business from the primary (left) Categories pop-up menu.
9. Click OK.

You now have a To Do List item, with a reminder that appears in Date Book the day before the item is due. After you click OK, the item list appears so you can see your other items, as well.

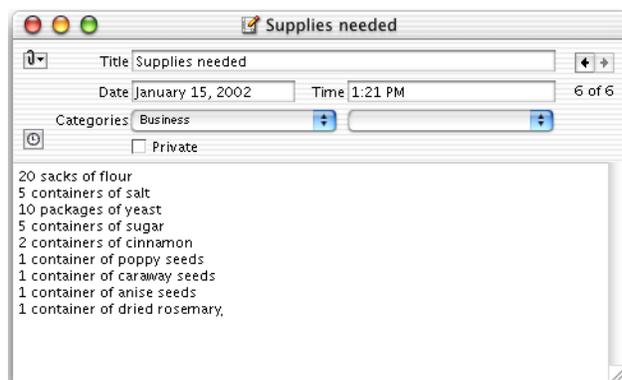
A HotSync operation also exchanges new To Do List items between Palm Desktop software and your handheld and updates any changes to items made in either location.

Close the To Do List application by clicking the close button in the upper-left corner of the window.

Creating a memo

Now it's time to make the list of supplies needed.

1. Click the New Memo button  on the toolbar.
2. Type a title for the memo: Supplies needed.

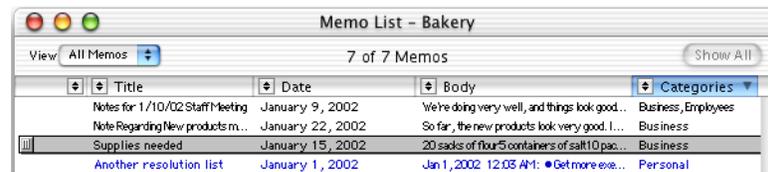


3. Type 1/15/02 for the date. You can leave the time as is.
4. Choose Business from the primary (left) Categories pop-up menu.
5. Press Return and type the supplies you need:

20 sacks of flour
5 containers of salt
10 packages of yeast
5 containers of sugar
2 containers of cinnamon
1 container of poppy seeds
1 container of caraway seeds

- 1 container of anise seeds
- 1 container of dried rosemary

6. Close the Memo window. This saves the memo and puts it away. If you want to refer to this memo or change it, click the Memos button  on the toolbar and double-click the memo from the list.



A HotSync operation also exchanges new memos between Palm Desktop software and your handheld and updates any changes to memos made in either location.

After you're through, close the memo list. If the To Do List is open, close it as well.

About attachments

With attachments, you can connect any event, address, memo, or To do List item to another, so related information is always available. You can attach an existing record to another by dragging the record onto the record you want to attach it to. If you are attaching an Address Book card or memo, you can create an attachment by selecting the icon in the title bar of the address card or memo card (wait until the icon darkens) and dragging it to the record you want to attach it to.

For example, if you have created an event—and you also have an address for the person you have the appointment with—you can attach the event to the address by dragging the event to the address card. You could also do the reverse: drag the address card (by the icon in the title bar) to the event. Once you do that, the items are attached, and you can quickly jump from one to the other to gather related or background information.

NOTE Attachments do not transfer to your handheld. When you perform a HotSync operation with records that contain attachments, each record is transferred to the handheld, but the relationship between the records is not transferred.

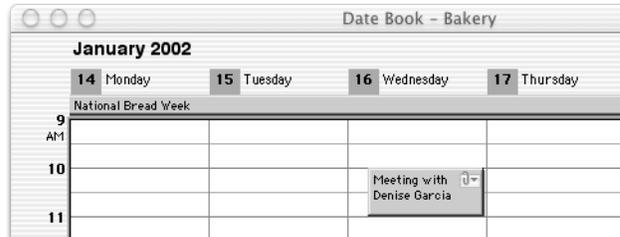
Creating attachments

Let's create an attachment so you can see how they work.

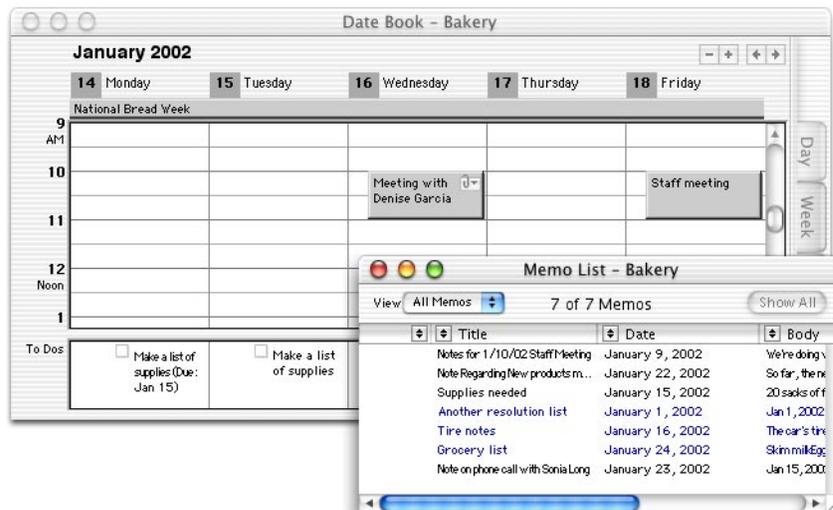
You have an appointment with Denise Garcia, the representative from your bakery supplies wholesaler. You have already created this event in Date Book. When you did that, you were prompted to attach Denise Garcia's address card and the new event.

Now let's attach the memo you just created—the one listing the supplies you need—with the Denise Garcia event.

1. Click the Date Book button  on the toolbar until you see the Week view.
2. Find the event that says Meeting with Denise Garcia. It's in January 2002, in the morning. (The day it appears in your Date Book can vary.)



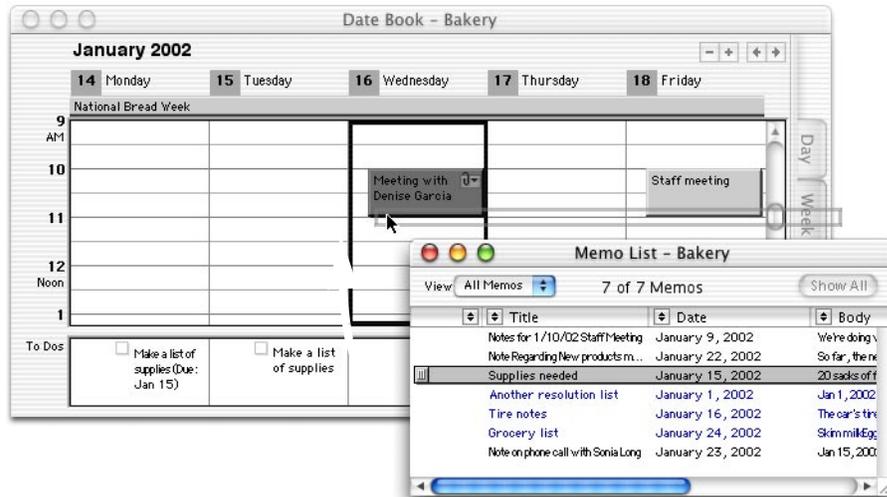
3. Click the Memos button  on the toolbar.
4. Shrink the size of the Memo List window and the Week view window so you can see the memo list and the event at the same time.



5. Scroll through the memo list until you see Supplies needed. Click this line once so it is selected.
6. Move the pointer over the gripper icon .



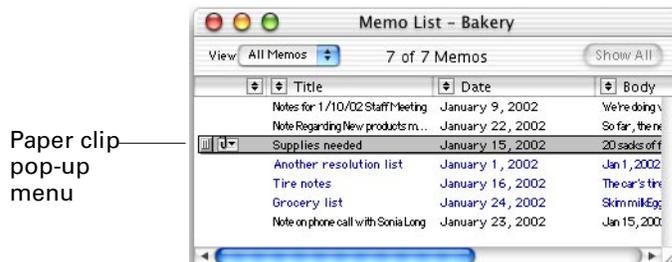
7. Drag the Supplies needed memo to the event that says Meeting with Denise Garcia. As you drag, you'll see a pointer, and a box appear around the event.



8. A paper clip appears once Denise Garcia's event is selected. Release the mouse button.

The memo is now attached to the event.

9. Look at the memo in the memo list, and notice it has a paper clip pop-up menu next to it. This shows the memo has an attachment.

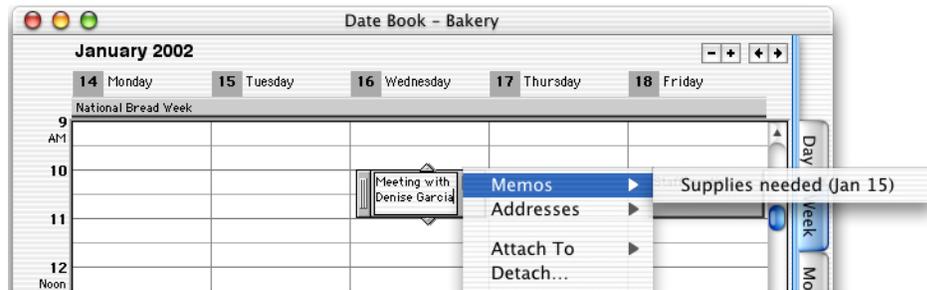


10. Click and hold the paper clip pop-up menu to reveal the attachments menu. Choose the event title.



The Date Book appears, showing you the event.

11. Click the paper clip pop-up menu in the event.



Notice the event now has two attachments: the memo you just attached (under Memos), and Denise Garcia's address (under Addresses), which was automatically attached when you created the event. You can jump to either the memo or address if you like.

You can create as many different attachments as you like to cross-reference whatever events, addresses, memos, or To Do List items you choose.

There are special sound effects for attaching one type of item to another. You can adjust the volume of these sound effects in the General area of the Preferences dialog box. (Choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9 to open the dialog box, and then click General.)

After you're through, close each window by clicking the close button in the upper-left corner.

Using the Attach Existing Item feature

If you prefer, you can use another method to create attachments.

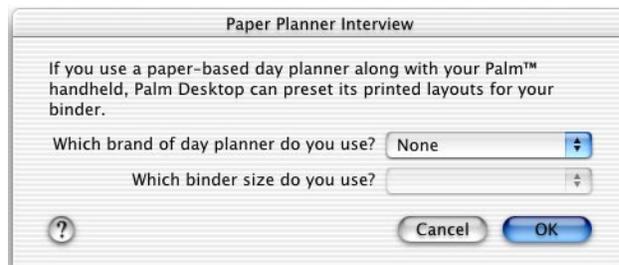
1. Click to select any event—or click any address, memo, or To Do List item from the list view.
2. Choose Attach To from the Create menu, and then choose Existing Item.
3. Follow the instructions in the Attach Existing Item dialog box. Click the gripper in the dialog box and drag the selected item to another item.

Printing labels

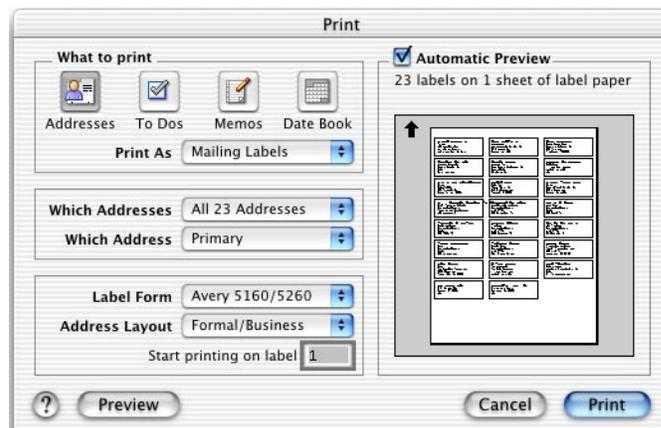
It's time to do some advertising. You want to send flyers to a list of customers already in your Bakery file, and you need to create mailing labels for them. For this tutorial, we'll print a test run on regular paper, rather than actual labels.

1. Click the Addresses button  on the toolbar.
2. With the list showing, click the Print button  on the toolbar.
3. The first time you print, you see a box asking if you use a day planner. To set up your day planner, choose your brand of day planner in the upper pop-up menu. In the lower pop-up menu choose the day planner binder size you use.

If you do not use a day planner, leave the upper pop-up menu showing None. (You can always change these settings later.)



4. Click OK.
5. When the Print dialog box opens, make sure the Addresses button is selected.



6. Choose Mailing Labels from the Print As pop-up menu.

The other pop-up menus contain settings for mailing labels. For this exercise, leave these settings as they are. The Preview area shows you a sample of what your label page will look like.
7. Click Print.
8. When the Print dialog box appears, type 1 in the From and To boxes to print only the first page of labels.
9. Make sure your printer is connected and switched on, and then click Print.

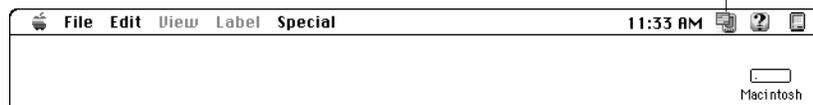
One page of "labels" prints on your printer's regular paper. If you like, print another page with different options to see what you get.

Using Instant Palm™ Desktop application

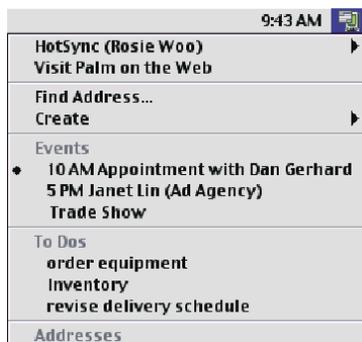
The Instant Palm™ Desktop application provides you with quick access to many of the most frequently used features of Palm Desktop software and HotSync Manager.

In Mac OS X, the Instant Palm Desktop menu appears when you click and hold the Palm Desktop icon in the dock if Palm Desktop is running. In Mac OS 9, the Instant Palm Desktop menu appears near the upper-right corner of the screen. It is always available unless you set your Instant Palm Desktop menu preference to off.

Instant Palm Desktop menu icon in Mac OS 9



In Mac OS 9, you see the Instant Palm Desktop icon in the upper-right corner of the screen.



In Mac OS X, the Instant Palm Desktop menu appears when you click and hold the Palm Desktop icon in the dock (Palm Desktop must be running for the menu to appear).

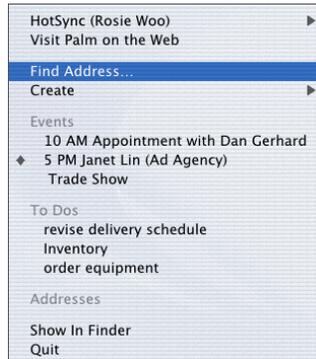


Click and hold the Palm Desktop icon in the dock

Displaying frequently used phone numbers

For quick access, you can display the names and telephone numbers of people you call frequently in the Instant Palm Desktop menu.

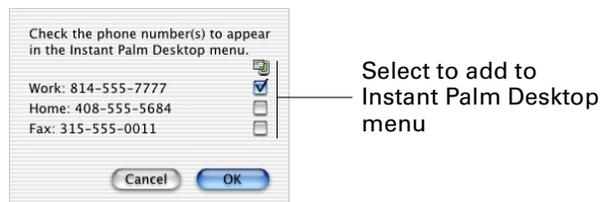
1. Choose Find Address from the Instant Palm Desktop menu.



2. When the Find dialog box appears, type denise garcia. (Case doesn't matter.)

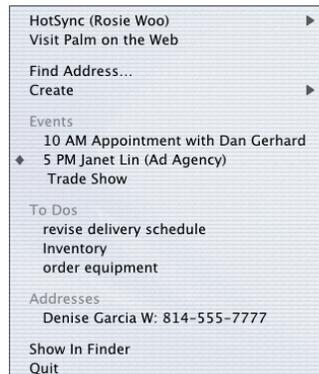


3. When her name appears in the list, click it once to select it.
4. Click Add to Menu.
5. Select a check box for each telephone number you want included in the Instant Palm Desktop menu. (To remove telephone numbers from the Instant Palm Desktop menu, you deselect these check boxes.)

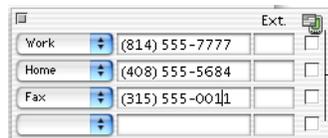


6. Click OK.

You'll now see Denise Garcia in the Instant Palm Desktop menu under Addresses.



You can also add or remove telephone numbers to the Instant Palm Desktop menu by viewing the address card in Palm Desktop software, then clicking the Phones section. Select the telephone numbers you want displayed in the Instant Palm Desktop menu. Deselect the telephone numbers to remove them from the Instant Palm Desktop menu.



Select to add to Instant Palm Desktop menu

Backing up your data

Your data is valuable. Always back it up regularly so you'll be protected in the event of equipment failure, inadvertent file deletion, or other mishap.

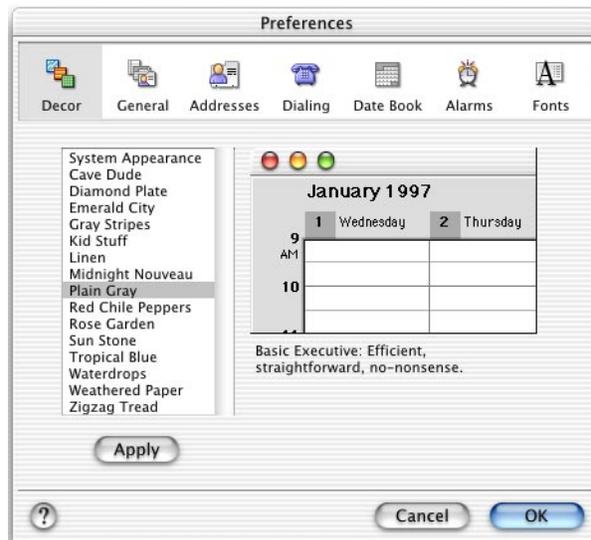
To back up your Palm Desktop user data file, make a copy of your data file. Choose Save as Copy from the File menu, then type a new name such as "Copy of Arthur Kong3 Jan" in the Save as Copy dialog box.

Applying Decors

Decors are a fun way to personalize your Palm Desktop software appearance with colors and textures.

1. Open your Palm Desktop file by double-clicking its icon. You can also choose Open Palm Desktop from the Instant Palm Desktop menu.
2. Choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9.

3. Click the Decor button.



4. Choose any of the decors from the scrolling list.
5. Click Apply to see your file redecorated with that decor.

You can change the decor at any time. Decors change onscreen appearance only. They do not change the way your information looks when it prints.

Where to go from here?

Congratulations! You've finished the tutorial. You've seen just some ways Palm Desktop software can make your life a little bit easier.

- If you're ready to synchronize the information in Palm Desktop software and your handheld, see ["About HotSync operations"](#) in [Chapter 12](#).
- If you have any questions the tutorial didn't answer, scan the Contents of this guide. It's a quick way to find the information you need. Or check the Index if you know exactly what you're looking for.

Palm Desktop software also features an extensive onscreen Help system. It's available onscreen whenever you need it—just choose Palm Desktop Help from the Help menu. You can also access help by clicking the question mark in a dialog box to go directly to a relevant Help topic.

Working with Address Book

This chapter explains the basics of working with contact information and address lists.

About Address Book

The Address Book application in Palm™ Desktop software helps you manage information about your business associates, friends, family, and other people you contact. You can enter names, addresses, telephone numbers, e-mail addresses, birthdays, web sites, comments, and more. Addresses can be organized by category, sorted, printed, and searched by any criteria. You can also dial the telephone and automatically copy address information into letters.

Addresses can be exported as a vCard file and imported to another person's Palm Desktop Address Book or any personal information manager that supports the vCard standard. This feature makes it easy for you to share addresses between your Mac computer and a Windows computer.

Addresses you enter in Palm Desktop software appear in the Address Book application on your handheld after a HotSync® operation.

Viewing addresses

You can view your addresses by:

- Address card, for viewing one address at a time. You can also change existing address information when viewing the address card.
- Address list, for viewing contact information many records at a time.

To see a list of your addresses, choose Address List from the View menu, or click the Addresses button on the toolbar.

For more information on list views, see [Chapter 7](#).

Creating and changing addresses

To create an address, choose Address from the Create menu, or click the New Address button on the toolbar. You see a new address card with the Name section expanded and the first name field highlighted. As you type information, press Tab to move from field to field (or Shift-Tab to move backwards). Press Enter or Return to move from section to section.

Enter information in an address card

Changing information

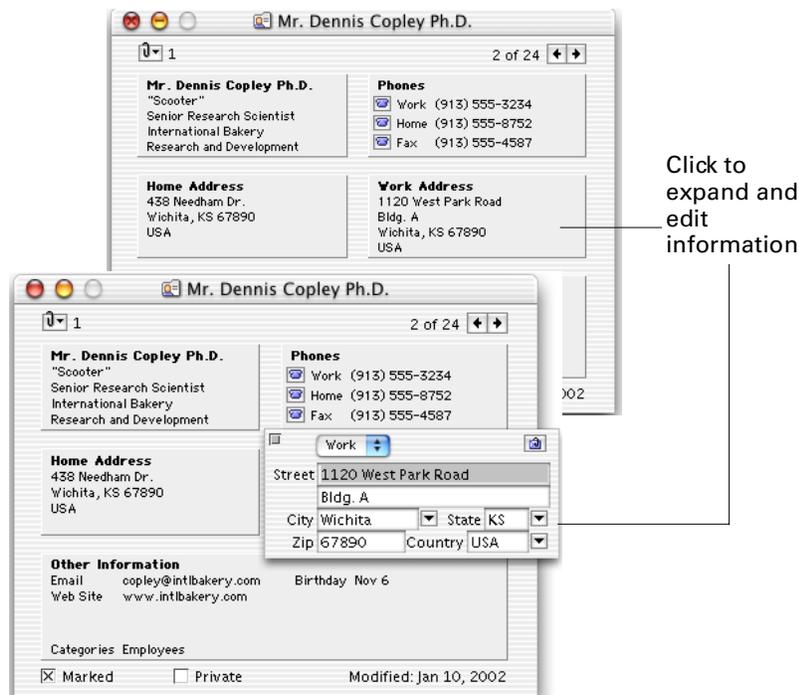
You can change information in an existing Address Book item by locating the item in the list and double-clicking it.

	Full Name	Company	Phone 1	Phone 2	Categories
<input type="checkbox"/>	Kim Chen	The Candlelight Restaurant	W: (408) 555-0900	H: (503) 555-4655	Customers
<input checked="" type="checkbox"/>	Mr. Dennis Copley Ph.D.	International Bakery	W: (913) 555-3234	H: (913) 555-8752	Employees
<input type="checkbox"/>	Samuel Corning	International Bakery	W: (803) 555-7911	H: (513) 555-1987	Employees
<input type="checkbox"/>	Vern Critser	International Bakery	W: (603) 555-3322	H: (205) 555-2388	Employees

Double-click an item in the list to edit it

You can also use the Find feature to locate the item you want. For more information, see [Chapter 8](#).

The address card is divided into sections for easy viewing and editing. Click a section to expand it so you can work more easily. If you click a specific field, that field is highlighted when the section expands. When you click outside of the expanded portion of the section, it collapses.



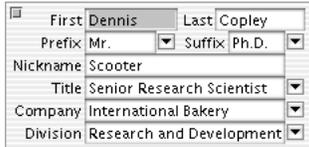
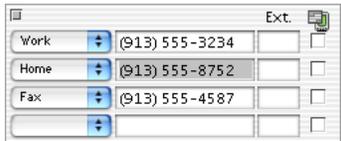
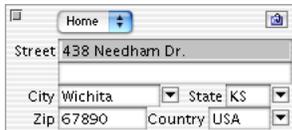
If you include a country in a person's address, the completed address card, and any printouts, are automatically formatted for that country's address style. You can edit these international address styles in Address Book preferences.

The Other Information section includes fields for Comments, Email, Web Site, Birthday, Age, and Categories, and a number of custom fields (you set the number of custom fields in the Address preferences dialog box). See ["Transferring addresses to your handheld"](#) later in this chapter for information about how the fields in the Other Information section transfer to your handheld.

The Comments field is an excellent place to note brief information that is unique to a particular person. If you have information that is likely to apply to many of your contacts—for example, a spouse or partner, children, favorite colors—consider creating a custom field for that information. You can store more extensive information in a memo that is attached to the Address Book item. For more information, see [Chapter 5](#) and [Chapter 9](#).

When you add or change information, the modification date is displayed in the lower-right corner of the address card. Changes you make to items in the address list are updated on your handheld after a HotSync operation.

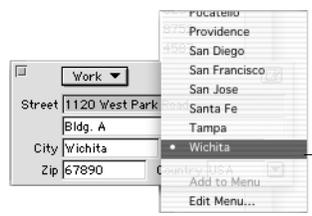
When you expand the Phones section, you'll see check boxes to the right of each telephone number. Select one of these check boxes, and that telephone number appears in the Instant Palm™ Desktop menu. Deselect the check box to remove the telephone number from that menu. For more information, see [“Working with addresses”](#) in Chapter 13.

<p>Name section: for name, title, and company information</p>	
<p>Phones section: for telephone and fax numbers. Click box to show number in Instant Palm Desktop menu</p>	
<p>Address section: for address information</p>	
<p>Address section: for address information</p>	
<p>Other Information section: for comments, e-mail, web site, birthday, category, and information you choose</p>	

Using and changing selection lists

Some fields in the address card provide a pop-up menu from which you can choose an entry instead of having to type one. Those fields have a triangle  next to them. Click the triangle and choose one of the entries from the pop-up menu.

When you type in a field that has a selection list, whatever you type is added to the pop-up menu. (You can turn this feature off. See [“Setting Address Book preferences”](#) in this chapter.)



Choose an entry from the pop-up menu

To automatically add newly entered items to the Email, Web Site, and Custom fields selection lists, choose Address from the Create menu. In the Other

Information section, click the triangle next to the field and choose Field Options from the pop-up menu. Select the Automatically check box.

NOTE Only newly entered items are added to selection lists. Items from data that has been imported are not added. If you want to add imported items to a selection list, click the pop-up menu for that field and choose Add to Menu.

Using auto-completion

If you're typing in a field with an entry list, matching entries are displayed as you type. You then either press Tab or click outside of the field to accept the auto-completed entry, or keep typing if the entry is not what you want. You can turn the auto-completion feature on or off in Preferences.

Using auto-capitalization

You can have any word you type automatically capitalized. If this preference setting is on, the first letter of each word you type is automatically capitalized after you press Tab or click out of that field. For the Name field and both Address fields, you can set this option in the Address preferences dialog box. For the Email and Custom fields, set this option by clicking the triangle next to the field in the Other Information section and choosing Field Options.

Formatting telephone numbers

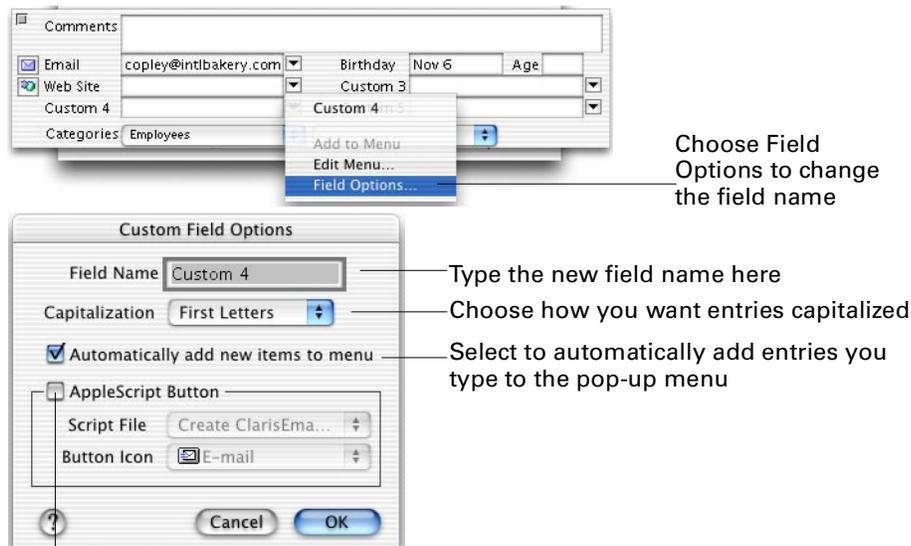
Telephone numbers are automatically formatted. After you type the numbers and press Tab or click outside the field, the numbers are formatted with the telephone number format you have specified in the Address preferences dialog box.

You can specify the default area code in the Address preferences dialog box. When you do that, the area code is inserted when you type a telephone number without one. Type the seven-digit telephone number, then press Tab or click out of the field. The local area code appears and the telephone number is formatted.

NOTE Telephone numbers do not format automatically unless you specify a default area code in Address preferences.

Setting custom field options

In the Other Information section at the bottom of the address card, you can customize the Birthday, Email, Web Site, and Custom fields. To make it easier to use these fields, you can change their names by clicking the button and choosing Field Options from the pop-up menu.



Choose Field Options to change the field name

Type the new field name here
 Choose how you want entries capitalized
 Select to automatically add entries you type to the pop-up menu

Select to display a button for access to attached documents, e-mail, or the web

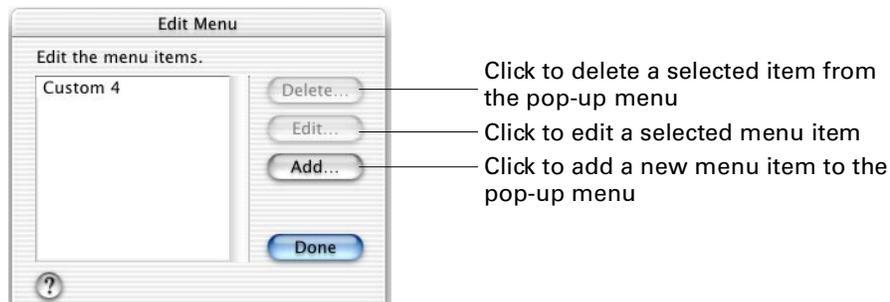
If you are an AppleScript developer, you can create an AppleScript file and attach it to a custom field; then activate that script with a button. First create the AppleScript file. Next, place the completed AppleScript file in a folder named Field Options Scripts, which you create within the Palm Desktop folder in the following location:

- Mac OS X: To make the AppleScript available to a single user, create the folder in <Hard Disk>/Users/[Mac username]/Library/Application Support/Palm Desktop/. To make the AppleScript available to all Palm Desktop users, create the folder in <Hard Disk>/Library/Application Support/Palm Desktop/.
- Mac OS 9: Create the folder in <Hard Disk>/System/Application Support/Palm Desktop/.

In the address card, click the Other Information section, and then double-click the custom field name. After that's done, select the AppleScript Button check box in the Custom Field Options dialog box, choose the AppleScript file from the Script File pop-up menu, then choose a button from the Button Icon pop-up menu. The button appears next to the custom field. Click it, and the AppleScript activates.

NOTE For AppleScripts to run, you must have the proper AppleScript system extensions installed on your computer. For more information, see the documentation that came with your computer's operating system software. For information on creating AppleScripts, see the documentation that came with your AppleScript developer tools.

You can change the items that appear in a custom field pop-up menu by choosing Edit Menu. Use it to add, change, or remove menu items from the pop-up menu. The Edit Menu dialog box appears.



Using the Email and Web Site fields

You can send electronic mail and browse web pages automatically by using the Email and Web Site fields together with an e-mail application and a web browser.

NOTE You must have an e-mail application set up on your computer to use the Email button. You must have Netscape Navigator, Microsoft Internet Explorer, or other browser set up to use the Web Site button.

In the address card, click the Other Information section. Type a person's e-mail and web site information in the Email and Web Site fields. Then click the button to the left of either field.

- The Email button launches your e-mail application, creates a new e-mail message, and inserts the person's e-mail address in the To field for you. Your e-mail address appears in the From field.
- The Web Site button launches your Internet browser, inserts the person's web site address, and takes you to the person's web site.



Using Birthday Minder

You can keep track of birthdays using Address Book. In the Other Information section of the address card, type the person's birthday in the Birthday field. When you press Tab or click out of the field, an untimed event is created for that person on his or her birthday. A To Do List item is scheduled for the birthdate, and a reminder is added to the day five days before the birthday.

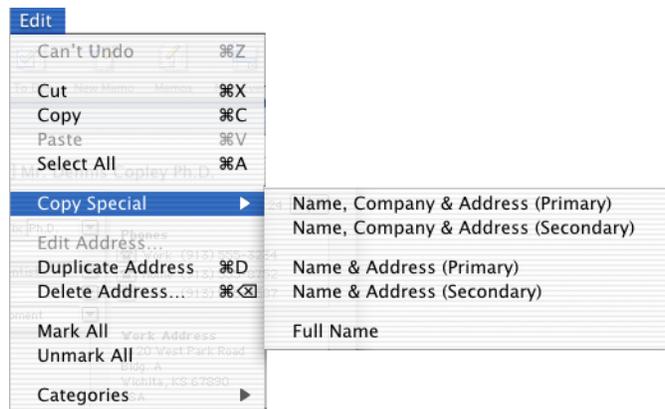
You can type just the birth month and day if you prefer. If you type the birth year as well, the person's age displays in the card. You can also type the birthday month and day, then enter the age in the Age field—the birth year is inserted in the Birthday field. You may use any of these formats to enter a birthday:

5/26/1960	5.26.1960
5.26.60	May 26, 1960
5/26	May 26, 1960
5.26	May 26

The Birthday and Age fields transfer to the Note field for the corresponding Address Book item on your handheld.

Copying Address Book information

You can copy information from an address card and paste it into a memo, another address card, or another application. Choose Copy Special from the Edit menu to copy the person's full name, address, company—or a combination of these. You can choose between copying the primary address, stored in the address section on the left side of the address card, or the secondary address, stored in the address section on the right side of the card.



If you want to copy the information in one field only, click that field to select it, make sure the text in the field is highlighted, then choose Copy from the Edit menu.

Transferring addresses to your handheld

New Address Book items and changes to existing items are transferred to the Address Book application on your handheld when you perform a HotSync operation. This operation also moves new items from the Address Book into the Palm Desktop software address list, and synchronizes all changes made on either the handheld or the computer.

The following list shows the details of the data transfer for addresses between your computer and your handheld:

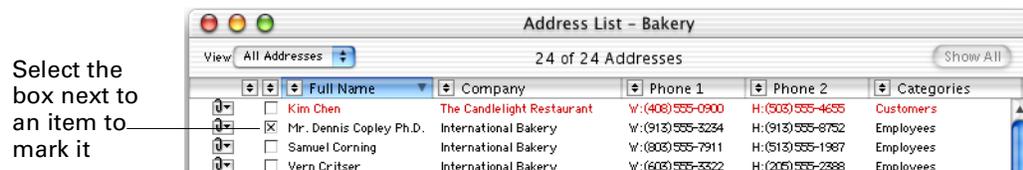
Palm Desktop software items	Transfer to Address Book on handheld as
Last name	Last name
First name	First name
Prefix, Suffix, Nickname	Do not transfer to the handheld
Title	Title
Company	Company
Division	Does not transfer to the handheld
Phone 1 and extension	Work phone with extension in the same field (first phone field) The default label of the first phone field is "Work." If you change the label of the field, Phone 1 will continue to be transferred to the first phone field in the handheld.
Phone 2 and extension	Home phone with extension in the same field (second phone field)
Phone 3 and extension	Fax phone with extension in the same field (third phone field)
Phone 4 and extension	Mobile phone with extension in the same field (fourth phone field)
Email	E-mail (fifth phone field)
Phone number formats	As entered
Comments	Address note, comment section
Street, City, State, Zip, Country	Address, City, State, Zip, Country
Secondary address	Address Book note, secondary address section

Palm Desktop software items	Transfer to Address Book on handheld as
Categories	The first category you assign to an entry is transferred to the handheld. The second category does not transfer. See “Transferring categories to your handheld” in Chapter 8 .
Birthday	Address Book note
Age	Address Book note
Web Site	Address Book note
Custom fields 1 to 4	Custom 1 to Custom 4
Custom fields 5 to 9	Do not transfer to the handheld
Private	Private
Attachments to entries, such as memos, Date Book events, or To Do List items	Relationships do not transfer to the handheld. The Address Book item and each attached item transfer to their corresponding applications on the handheld. The relationship between the items, however, does not transfer.
File attachments, such as letters	Do not transfer to the handheld

Marking addresses for printing

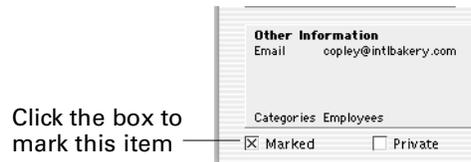
In some cases you may want to print only some of the addresses in your list. For example, you might want to address envelopes only to your coworkers, or print labels only for your friends and family.

You can mark items in the address list. Choose Address List from the View menu, or click the Addresses button on the toolbar. Within the address list, select the box to the left of each item you want to mark.



If you want to quickly mark or unmark all of your addresses, choose Mark All or Unmark All from the Edit menu.

You can also mark items individually by clicking the box in the corner of the address card.



To print the marked items, choose Print from the File menu and then click Addresses. From the “Which Addresses” pop-up menu in the Print dialog box, choose “Marked addresses.” For more information on printing Address Book entries, see [Chapter 11](#).

You can also mark items for sorting and filtering the address list. For more information, see [Chapter 7](#).

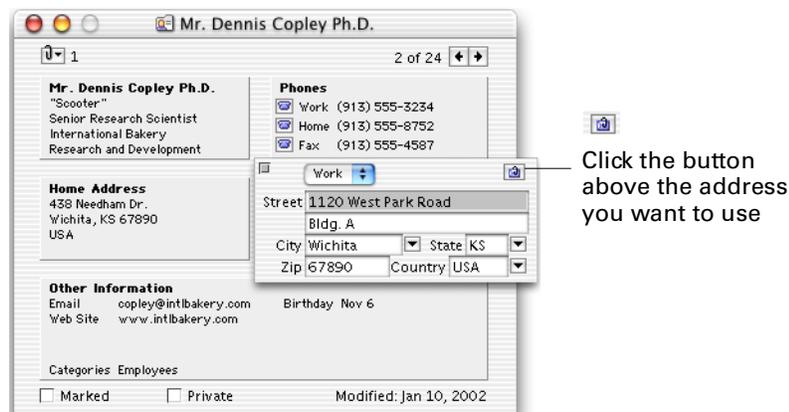
Attaching a letter to an Address Book entry

You can copy the name and address from an Address Book entry into a ClarisWorks, AppleWorks, or MacWrite Pro template letter and then attach a copy of the completed, addressed letter to the address card. You must have ClarisWorks 4.0 or higher, AppleWorks, or MacWrite Pro 1.5v3 installed on your system. The personalized letter template is stored in the Letter Templates folder within Application Support/Palm Desktop/.

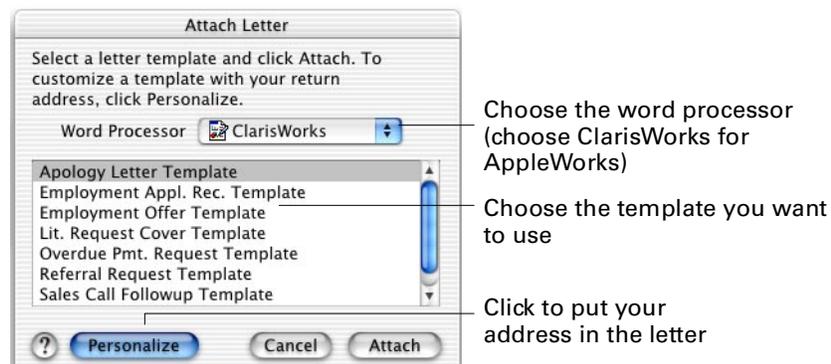
NOTE The letter you create using this process is not transferred to your handheld in a HotSync operation.

Adding an address to a letter template

Open an address card, click the address you want to use for your letter; then click the Attach Letter button directly above the address.



The first time you use this feature, a message appears suggesting you personalize the letter template. Click OK, then click Personalize in the Attach Letter dialog box.



The letter template opens in your word processor. It contains instructions for personalizing it.

When you have finished personalizing the letter template, return to the Attach Letter dialog box. Choose your word processor from the Word Processor pop-up menu, then select a template. Click Attach. The word processor opens the letter template, the person's name and address are inserted, and the word processor's Save As dialog box opens. Choose a name for the letter and click OK to save it.

An attachment from the letter to the person is created. Click the person's name from the paper clip pop-up menu  and select the letter to open it in your word processor, edit the address as necessary, and print it.

See online help for additional information about working with letter templates.

Deleting addresses

You can delete an Address Book item at any time. To delete an item, open the address card you want to delete, or select it from the address list. Then choose Delete Address from the Edit menu, or click the Delete button on the toolbar.

The next time you perform a HotSync operation, items you deleted from Palm Desktop software are also deleted from your handheld.

For more information about archiving items you delete from your handheld, see [“Archiving data you delete from your handheld”](#) in [Chapter 12](#).

Dialing telephone numbers

You can dial the telephone automatically if there is a modem connected to your computer. You can also dial a telephone number by playing the dialing tones through your computer's speaker.

NOTE When you open Palm Desktop software, it determines the methods that are currently available for dialing a telephone and displays them in Dialing preferences. If your computer uses a version of Mac OS X and it also has a modem, but Modem is not listed in the Dial through pop-up menu, that is because the particular combination of operating system and Palm Desktop software on your computer does not enable use of a modem.

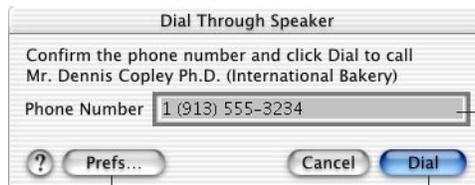
To dial a telephone number using a modem, make sure your modem is connected to your computer and its power is switched on. Your modem should be connected to the same line as the telephone you want to use. Choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9, and then click the Dialing button. From the Dial through pop-up menu, choose Modem Port and click OK. (On Mac OS X, the Modem Port option is not available if your version of does not enable modem dialing.)

On an address card, click the telephone button next to the telephone number you want to dial.



Click to dial the telephone number

If you have “Confirm number before dialing” selected in Dialing preferences, a dialog box opens asking you to confirm that you want to dial the telephone number. Otherwise, the telephone dials immediately.

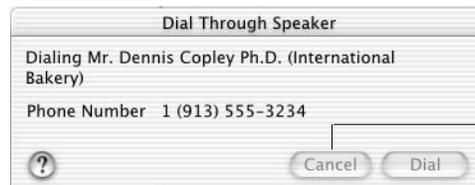


Correct the telephone number if necessary

Click to set Dialing preferences

Click to dial the telephone

If you change your mind about calling, you can click Cancel to stop dialing and release the modem.



Click Cancel to stop dialing

If you are dialing through the modem, when dialing is complete, pick up the telephone handset, and then click the Release button to release the modem so you can talk through the handset.

You can specify the local area code in Dialing preferences so an area code is added when necessary. This is especially useful if you travel with your computer.

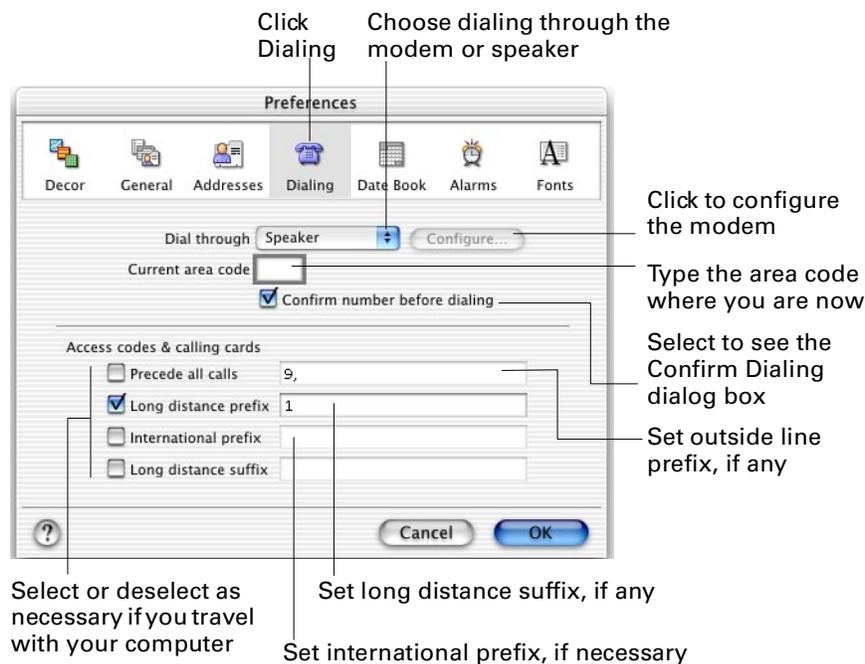
Dialing international numbers

In the Phones section of the address card, place a plus sign (+) before international telephone numbers. The international dialing prefix (specified in Dialing preferences) is used when dialing the telephone number.

Setting dialing preferences

You can set telephone dialing preferences by choosing Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9, and then clicking the Dialing button.

NOTE When you open Palm Desktop software, it determines the methods that are currently available for dialing a telephone and displays them in Dialing preferences. If your computer uses a version of Mac OS X and it also has a modem, but Modem is not listed in the Dial through pop-up menu, that is because the particular combination of operating system and Palm Desktop software on your computer does not enable use of a modem.



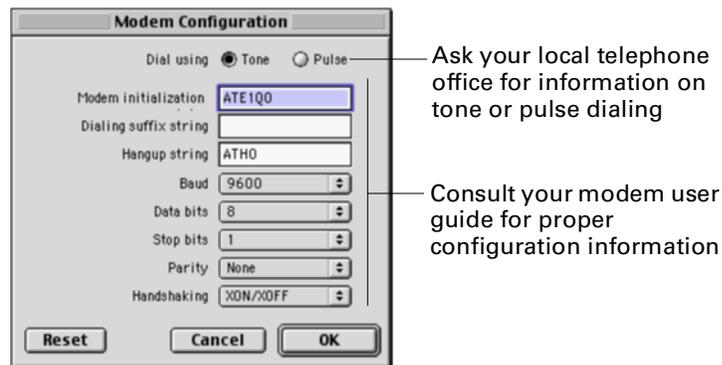
The “Precede all calls” field can contain any number you must dial, such as 9 for an outside line, an access number for a long-distance carrier, or a calling-card number. The Long distance prefix field can contain any number you must dial to make a long distance call, such as 1.

Configuring your modem for dialing

You can configure your modem by clicking the Configure button in the Dialing preferences panel. Proper modem setup depends on your modem and the telephone service you have. For information on the correct modem settings, see the user guide provided with your modem. For more information on tone or pulse dialing, consult your local telephone office.

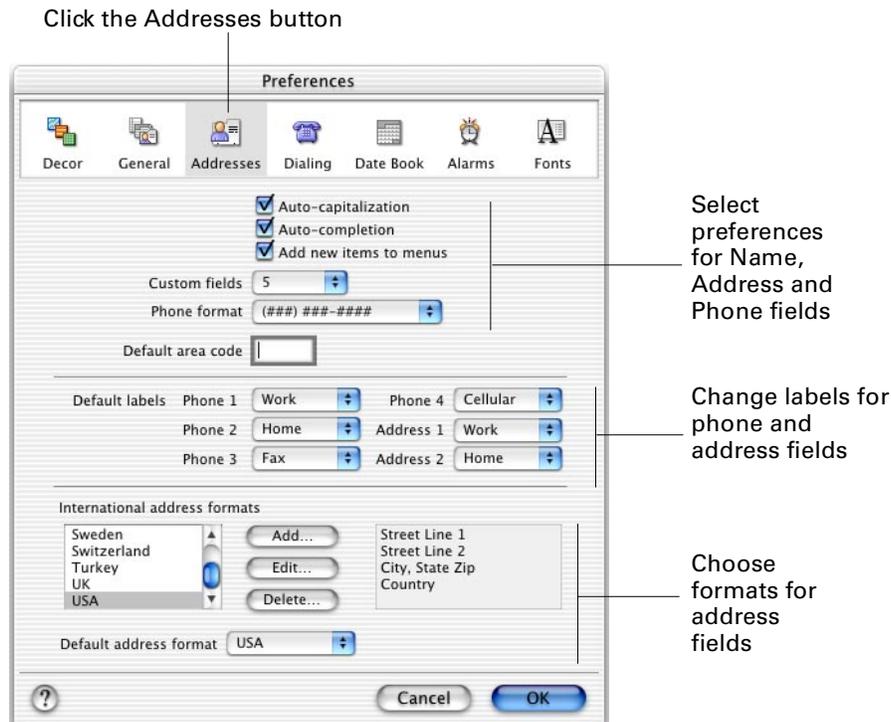
NOTE When you open Palm Desktop software, it determines the methods that are currently available for dialing a telephone and displays them in Dialing preferences. If your computer uses a version of Mac OS X and it also has a modem, but Modem is not listed in the Dial through pop-up menu, that is because the particular combination of operating system and Palm Desktop software on your computer does not enable use of a modem.

The following screen shows the Modem Configuration dialog box in Mac OS 9.

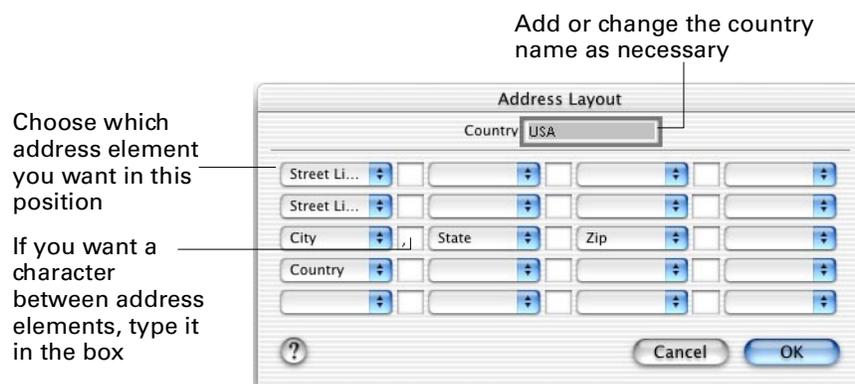


Setting Address Book preferences

You can set preferences for address cards by choosing Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9. In the Preferences dialog box, click the Addresses button.



You can change international address formats, or add new ones. To change an address format, select the country and click Edit. To add a new address format for a country, click Add. The Address Layout dialog box appears.



Working with Date Book

This chapter explains the basics of working with Date Book.

About Date Book

Date Book gives you a way of viewing your schedule. You can easily move around in Date Book to see different days, weeks, or months. In the Date Book, you can do the following:

- Add, change, and move events
- Create repeating or continuous events
- Create untimed events
- Change event durations
- Add, change, and move To Do List items
- Set alarms
- Mark completed tasks
- Create attachments

New Date Book events and changes in already-existing events are transferred to Date Book on your handheld when you perform a HotSync® operation.

Viewing Date Book

Date Book contains three views: Day, Week, and Month. All three views show you events. You can quickly switch between the different views by clicking one of the tabs at the right edge of the Date Book window or repeatedly clicking the Date Book button on the toolbar.

Using Day view

To view a single day, click the Day tab in Date Book or choose Date Book from the View menu and then choose Day.

A check mark indicates a completed To Do List item Click to move to the previous or next day

The colored line extends as the day progresses and shows the current hour

The white zone indicates your work hours

If you have a small monitor you can set a Date Book preference to display more hours in the event area

Event Your tasks are listed in this area by their priority

Using Week view

To view several days at a time, click the Week tab in Date Book or choose Date Book from the View menu and then choose Week. Five days appear by default, but you can change the number of days that are displayed.

Click to show the previous or next day (relative to the current day). Option-click to show the previous or next week.

Click to subtract or add a day to the view

Events

The colored line extends as the day progresses and shows the current hour

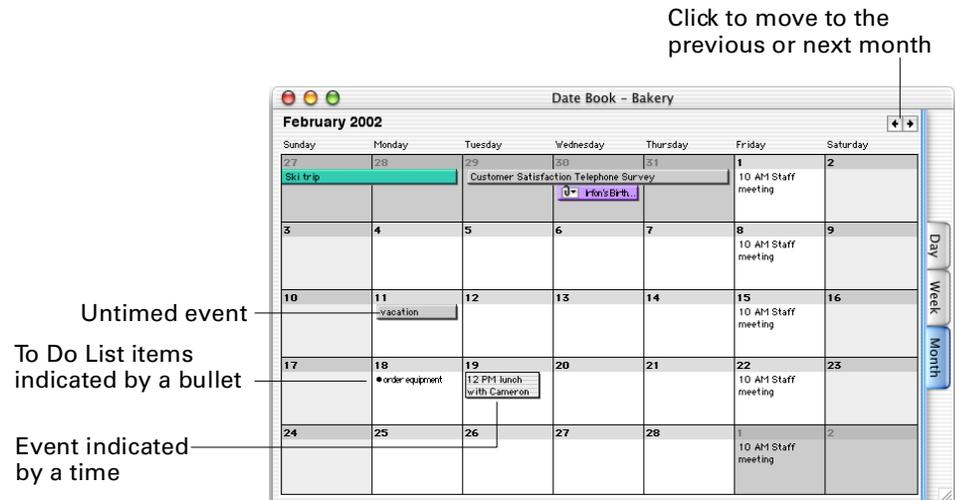
Your To do List items are listed in this area

A check mark indicates a completed To Do List item

If you have a small monitor you can set a Date Book preference to display more hours in the events area

Using Month view

To view a month at a time, click the Month tab in Date Book or choose Date Book from the View menu and then choose Month.



Showing or hiding items in Month view

In Month view, there is not a lot of space to show the text of all the events. To Do List items and all events display by default. You may prefer to hide events or To Do List items, so that you can easily see the other type of item. You can also hide both timed events and To Do List items, so that just untimed events are displayed.

To hide events, choose Date Book from the View menu and then deselect Show Events. To hide To Do List items, choose Date Book from the View menu and then deselect Show To Dos.

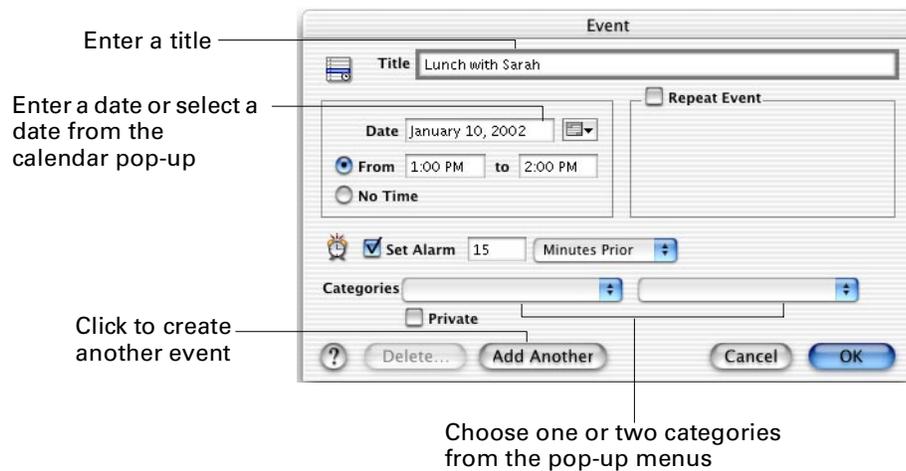
These settings do not affect how your events are transferred to your handheld during a HotSync operation. All items are transferred and are available on the handheld.

Adding information to Date Book

You can create events and To Do List items in any of the Date Book views.

Creating a timed event

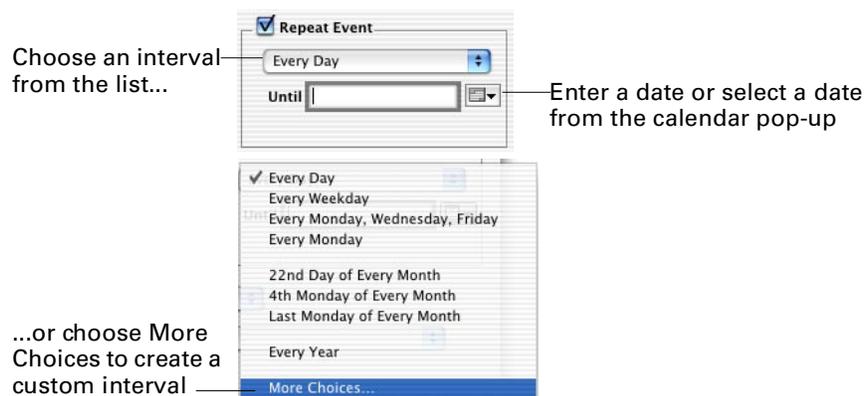
A single event is one that occurs once, such as an interview or a product demonstration. In the Day and Week Views, you can create an event by double-clicking the date and time slot you want. You can also choose Event from the Create menu or click the New Event button on the toolbar.



In Month view, if you double-click within a day (below the day number), you are prompted to create a To Do List item or event. Click the Event button in the dialog box and then click OK.

Creating a repeating or continuous event

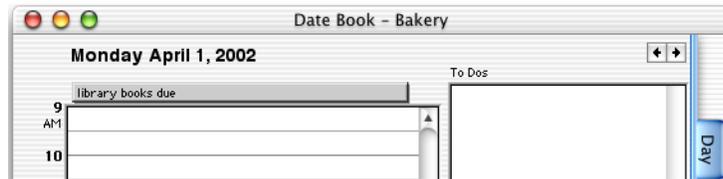
A repeating event is one that occurs regularly, such as a weekly staff meeting. A continuous event is one that spans consecutive days, such as a vacation or conference. In the Event dialog box, select Repeat Event. Then choose the interval you want from the pop-up menu and type the date of the final event in the series in the Until box or choose a date from the calendar pop-up.



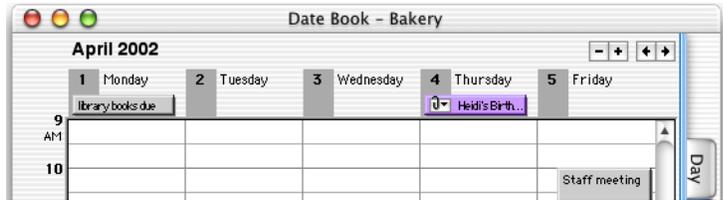
Creating an untimed event

Timed events are like appointments with scheduled start and end times. Untimed events have no start or end time defined for them. You can use untimed events as you would short notes about things to do. An untimed event is indicated by a box at the top of a day or days in Day, Week or Month view. You can have multiple untimed events per day. When there are two or more untimed events, they are listed in the order they were created.

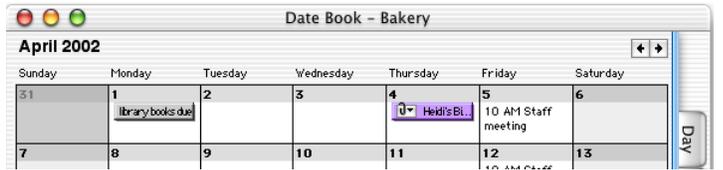
NOTE Files that you can use to import holiday information are available in the Palm folder.



Untimed event in Day view

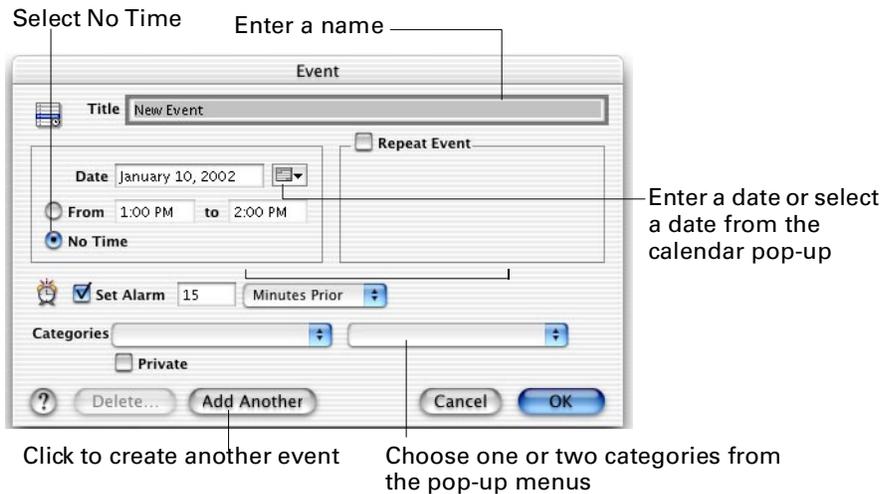


Untimed event in Week view



Untimed event in Month view

To create an untimed event, in the Event dialog box, select No Time, then complete the description of the event and other options.



In the Month view, if you double-click within a day (below the day number), a dialog opens asking you whether you want to create a To Do item or event. Click the Event button in the dialog box and then click OK.

To duplicate an event, select it, and then choose Duplicate Event from the Edit menu.

Setting alarms

Alarms are visual reminders of an upcoming meeting or event. There are two alarm preferences you can set.

- Set alarms on new events
- Show alarm dialog boxes

By default, both of these settings are off. To change the default for your events choose Preferences from the Palm™ Desktop menu in Mac OS X or from the Edit menu in Mac OS 9, and then click Alarms.

NOTE You can set an alarm for an individual event even if the Set alarms on new events preference is turned off.

- To set an alarm for every event you create, select Set alarms on new events.
- To set alarms to show on your computer as well as on your handheld, select Show alarm dialogs.
- To disable alarms altogether, leave both options unchecked.

When you create or edit an event, you can set an alarm for the event. Select Set Alarm in the Event dialog box and change the interval to the amount of time you want.



Since Date Book is synchronized to your computer's clock, be sure it is set to the correct time.

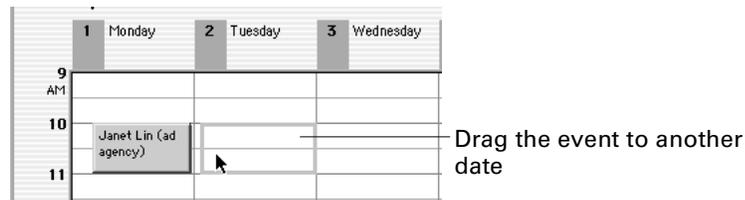
NOTE You can set an alarm for an untimed event. In this case, the alarm triggers at the specified period of minutes, hours, or days before midnight (beginning) of the day of the untimed event.

Editing events

Changes you make to events are updated on your handheld the next time you perform a HotSync operation.

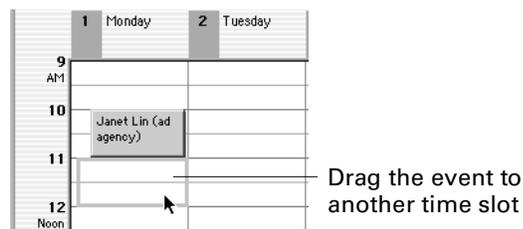
Changing an event's date

You can change the date of an event by either dragging the event to another date on Week or Month view in Date Book or by double-clicking the event to display the Event dialog box. If the event is selected, use the gripper to drag it to another date.

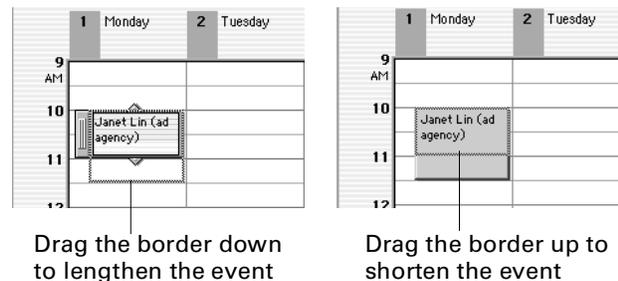


Changing an event's time or duration

You can change the time of an event by dragging the event to another time slot.



You can change the duration of an event by increasing or decreasing the size of the event box.



Or, you can double-click the event near the edge of the event box and then change the time or duration in the Event dialog box.

Moving untimed events

To move an untimed event, select the event and drag it to a new date in the Week or Month view. You see an outline of the event as you drag it.

Changing a repeating event's interval

To change the frequency of a repeating event, double-click the event near the edge of the box. In the Change Repeating Item dialog box, choose which event(s) you want to change and click OK. Then, in the Event dialog box, choose a new interval from the Repeat Event pop-up menu.

Renaming events

Click in the text area of the event to highlight the text and then start typing over the existing text.

Deleting events

To delete an event, select it, and then do one of the following:

- Press the Delete key
- Click the Delete button on the toolbar
- Choose Delete Event from the Edit menu

To delete a repeating event, select it and then choose Delete Event. In the Change Repeating Item dialog box, select the event(s) you want to delete and click OK.

The next time you perform a HotSync operation, the event is deleted from your handheld.

For information about archiving items you delete from your handheld, see [“Archiving data you delete from your handheld”](#) in [Chapter 12](#).

Transferring Date Book items to your handheld

Events transfer to the Date Book application on your handheld when you perform a HotSync operation. This operation also moves new Date Book events from the handheld into the Date Book module in Palm Desktop software and synchronizes all other changes made on the handheld or your computer.

The following list shows how data transfers between your computer and your handheld:

Palm Desktop software items	Transfer to Date Book on handheld as
Event title	Event description
Event From and To times, and alarm interval	Start and End times, and alarm interval
Categories	Not available on your handheld
Events that repeat monthly, on a certain day (for example, the civic club meeting on the third Tuesday of each month)	Repeating events by day of the week or month

Palm Desktop software items

Events that repeat on more than one day of the month (for example, a math tutorial on the second Tuesday and Wednesday of each month)

Private

Attachments to events, such as addresses or To Do List items

File attachments

Transfer to Date Book on handheld as

Separate repeating events for each day indicated

The example would transfer to the handheld as a series of repeating events on the second Tuesday and a separate series of events on the second Wednesday of each month. The relationship between the Tuesday events and the Wednesday events is not maintained.

Private

Relationships do not transfer to the handheld

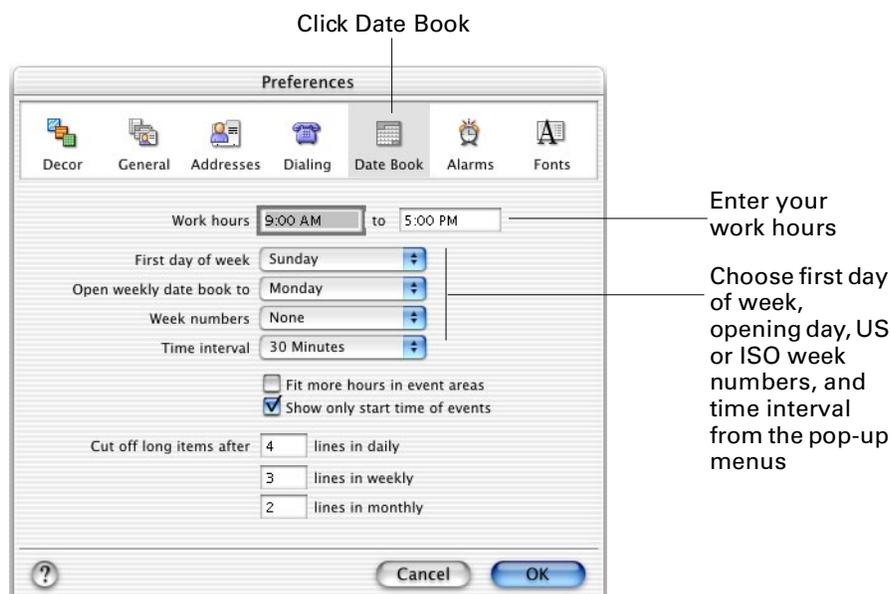
The event and each attached item transfer to the handheld to their corresponding applications on the handheld. The relationship between the items does not transfer.

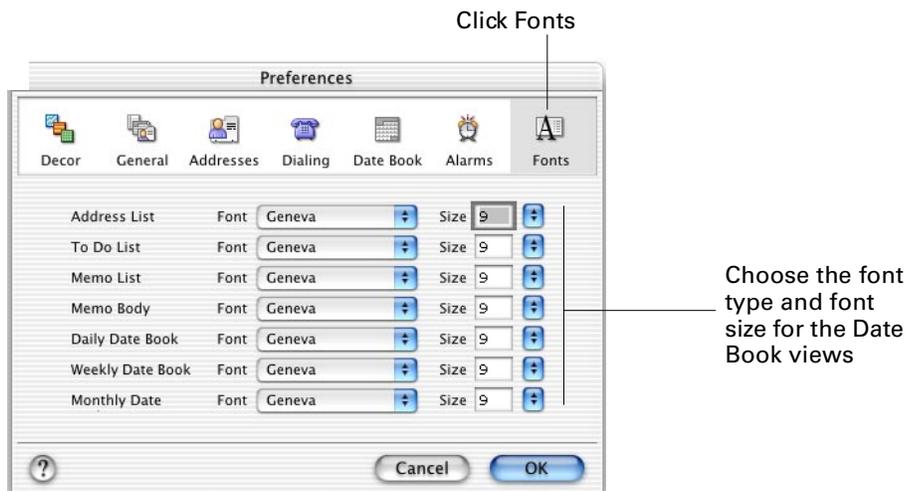
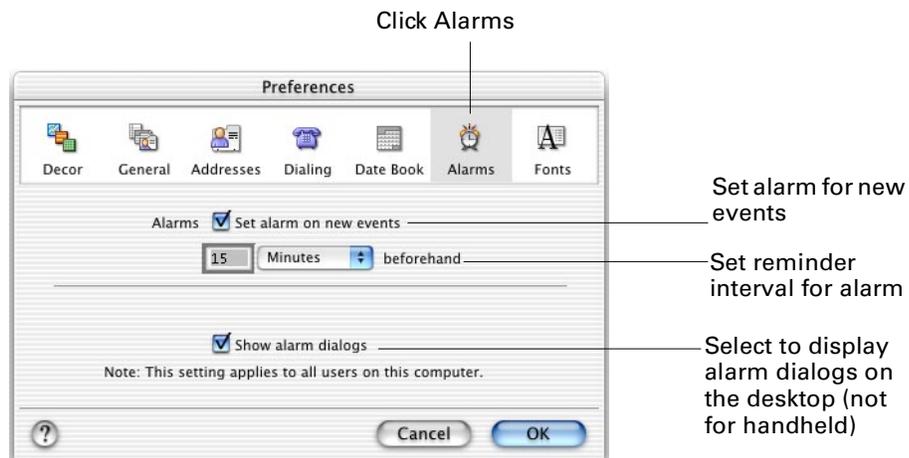
Do not transfer to the handheld

Setting Date Book, alarm, and font preferences

You can specify how you want your Date Book views and alarms to display. You can also select a font type and size for events.

Choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9.





Working with Memo Pad

This chapter explains the basics of working with Memo Pad.

About Memo Pad

You can use Memo Pad to jot down any type of text, for example, your ideas, meeting agendas, and phone call memos.

Memos appear in the Memo Pad application on your handheld after you perform a HotSync® operation.

Creating a memo

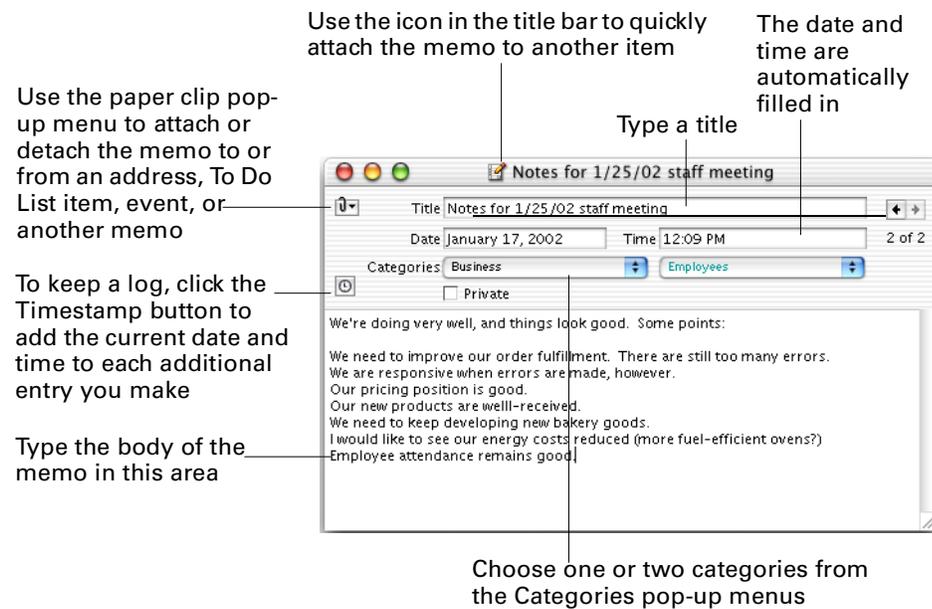
Create a memo when you want to store information that needs to be tracked, followed up on, or kept in a central location. For example:

- Family medical histories
- Meeting action items
- Serial numbers and registration numbers
- Directions to places you visit infrequently

Since a memo can contain up to 32KB of information, memos are better for long entries than the Comments field in an address card. The capacity of the Comments field is only 256 characters.

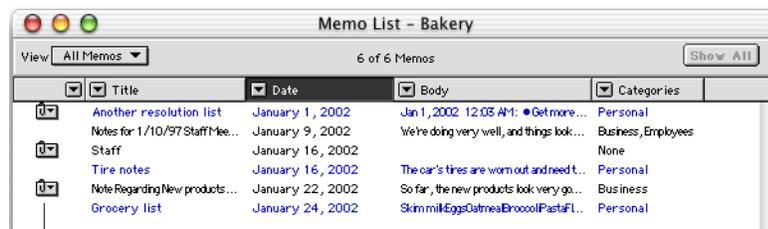
IMPORTANT Memos on your handheld are limited to 4KB of information. When you perform a HotSync operation, a memo that is larger than 4KB is preserved in its entirety so long as you do not edit the memo on your handheld. If you edit the memo on your handheld, the memo is truncated to 4KB. The next time you perform a HotSync operation, the 4KB memo overwrites the larger memo on Palm™ Desktop software.

To create a memo, choose Memo from the Create menu or click the New Memo button on the toolbar. The memo card appears.



Viewing memos

To see memos in a list, choose Memo List from the View menu or click the View Memos on the toolbar. You can view memos one at a time by double-clicking a selected memo in the memo list.

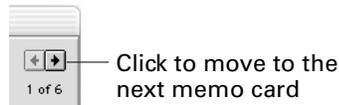


The paper clip pop-up menu indicates this memo is attached to another item

For more information about working with memos in list view, for example, sorting them, see [Chapter 7](#).

Browsing memos

To browse through a series of memo cards, click the  buttons in the memo card or press ⌘-Left Arrow to go to the previous memo and ⌘-Right Arrow to go to the next memo. The arrows are dimmed when you reach the first card or last card



To browse the memo list, press Up Arrow or Down Arrow or use the scroll bars.

If you have many memos, you may find it useful to browse your memo list by first sorting or filtering the memos.

Selecting memos

To change, delete, or duplicate a memo, first select it in the memo list.

To select	Do this
All memos	Choose Select All from the Edit menu
One memo	Click the memo
Many memos	Press ⌘ and click the memos
Consecutive memos	Click the first memo and then Shift-click the last memo

Changing memos

After you create a memo you can change the following:

- The title, date, and time fields and in the body of the memo
- The categories assigned to the memo
- Any attachments
- The font type and size used in the memo body

Whenever you change a memo, the Modified field is updated. The Modified field is preset to be hidden and is available only in the memo list. If you want to display the Modified field, choose Columns from the View menu. In the Columns dialog box, click next to Modified and then click OK. You see a new column heading at the far right side of the list.

See “[Setting font preferences](#)” in [Chapter 1](#) to change the font type and font size used in memos.

For information about changing attachments to memos, see [Chapter 9](#).

Attaching memos

To quickly attach a memo, position the pointer on the icon in the title bar of the memo. Drag the memo to any other record, or another memo. You can also make an attachment by dragging the memo to the New Address, New To Do, New Memo, or New Event button on the toolbar. Another way to attach memos is to use the Attach Existing Item palette. For more information see [“Attaching one existing record to another”](#) in [Chapter 9](#).

NOTE Attached memos are transferred to the Memo Pad application on the handheld, but the relationship between a memo and the item it was attached to does not transfer.

Deleting memos

You can delete a memo card by doing the following:

- Clicking the Delete button on the toolbar
- Choosing Delete Memo from the Edit menu

You can delete a selected memo in the memo list by doing the following:

- Pressing the Delete key
- Clicking the Delete button on the toolbar
- Choosing Delete Memo from the Edit menu

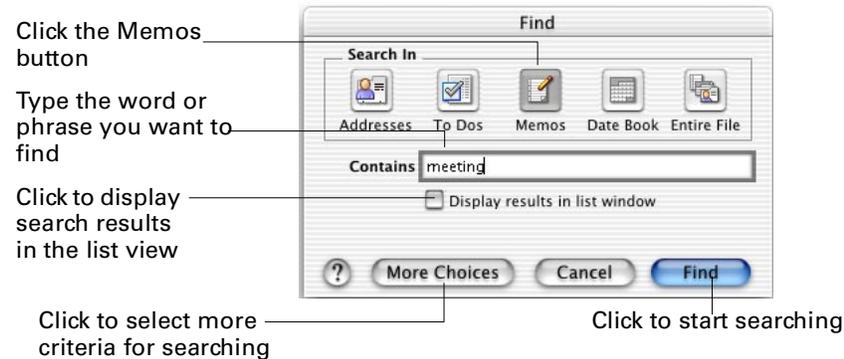
The next time you perform a HotSync operation, the memo is deleted from your handheld.

For information about archiving items you delete from your handheld, see [“Archiving data you delete from your handheld”](#) in [Chapter 12](#).

Finding memos

You can search through your memos for a word or phrase in any field in a memo. You can choose to display the results of your search in a list. For more information about using the find feature, see [Chapter 8](#).

Choose Find from the Locate menu or click the Find button on the toolbar. The Find dialog box appears.



If you didn't select "Display Results in List Window" in the Find dialog box, choose Find Again from the Locate menu to go to the next found memo.

Transferring memos to your handheld

Memos are transferred to the Memo Pad application on your handheld when you perform a HotSync operation. This operation also moves new items from the Memo Pad application on your handheld into the Memo Pad on Palm Desktop software, and synchronizes changes made on either the handheld or computer.

The following list shows the details of the memos data transfer between your computer and your handheld:

Palm Desktop software items	Transfer to Memo Pad on handheld as
Memo title	The first line of the memo The first line of a memo created on your handheld becomes the Memo title on Palm Desktop software.
Memo date and time	Do not transfer to the handheld When a memo is created on the handheld, the memo date and time on Palm Desktop software are filled with the time of the transfer to the computer.
Categories	Category The first category you assign to a memo is transferred to the handheld. The second category does not transfer. See "Transferring categories to your handheld" in Chapter 8 .
Private	Private
Memo body	Memo body

Palm Desktop software items	Transfer to Memo Pad on handheld as
Attachments to memos, such as addresses or To Do List items	Relationship does not transfer The memo and each item attached to it transfer to the handheld. The relationship between the items does not transfer.
File attachments	Do not transfer to the handheld

Working with To Do List

This chapter explains the basics of working with To Do List to track the tasks you need to do.

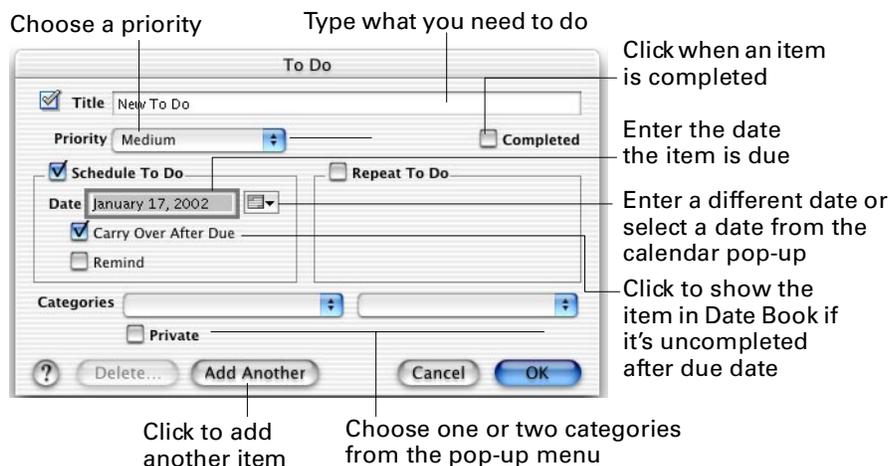
About To Do List

Using the To Do List module, you can keep track of tasks you need to accomplish. You can set completion dates for these items so they are displayed with your daily schedule in Date Book. You can also see them in a to-do list and organize that list by date, category, or priority. To Do List items can repeat at specific intervals, and you can assign one or two categories to each item.

After a HotSync® operation, To Do List items you create in Palm™ Desktop software appear in To Do List on your handheld. To Do List items with due dates do not appear in the Date Book application on the handheld. If the Date Book on your handheld has Agenda View, however, you can view events and To Do List items together. (Agenda View is available on handhelds using Palm OS® software version 3.5 or later.)

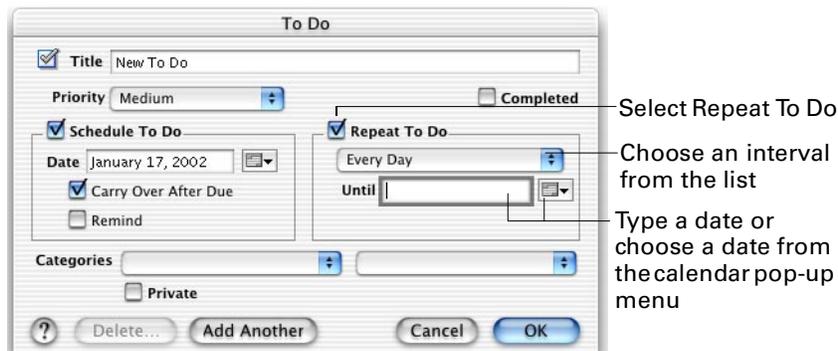
Adding To Do List items

To add a new item, choose To Do from the Create menu or click the New To Do button on the toolbar.

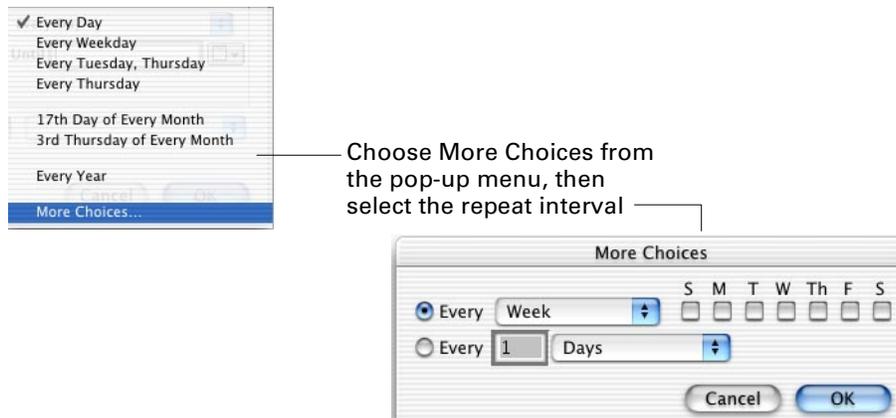


Adding repeating To Do List items

Some To do List items happen on a regular basis. To repeat an item on another day or another week, select Repeat To Do, and then choose a repeat interval from the pop-up menu that appears.



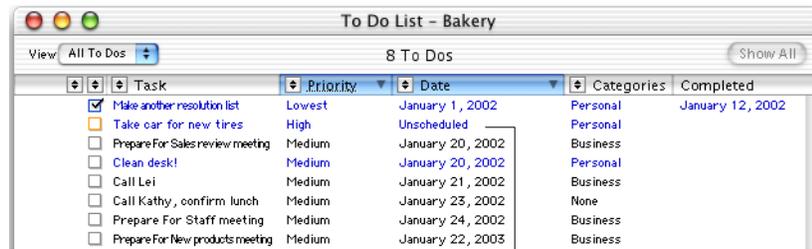
If the repeat interval that you need is not available in the pop-up menu, choose More Choices from the pop-up menu, then enter the appropriate information.



Adding unscheduled To Do List items

To Do List items don't need to have a specific due date. You can create unscheduled items whenever you think of something you need to do, but you don't know when you will be able to do it. Make an item unscheduled by deselecting the Schedule To

Do check box in the To Do dialog box. The item does not appear in any of the Date Book views and has no reminder, but it appears in the To Do List.



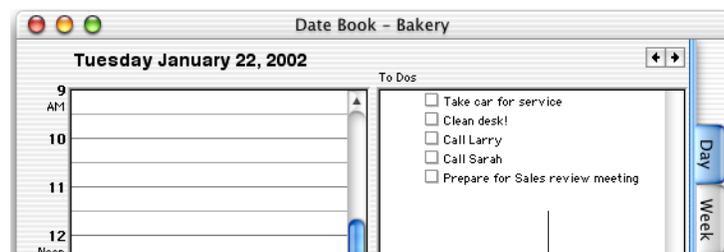
Unscheduled item

When you are ready to set a date for an unscheduled item, drag it from the To Do List to a day in the daily or weekly calendars. The item now has a due date, and appears in the Date Book views.

Adding To Do List items from Date Book

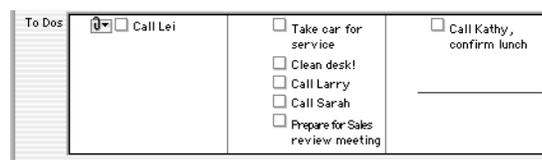
You can add To Do List items while you're in Date Book. When in Day or Week view, create a new To Do List item by double-clicking a blank portion of the To Do area. The To Do area is on the right of the Day view, and at the bottom of the Week view.

Day view



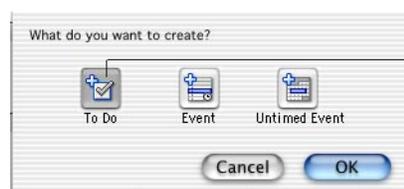
Double-click to create a new item

Week view



Double-click to create a new item

When in Month view, create a new To Do List item by double-clicking a day. Click To Do in the dialog box that appears, and then click OK.

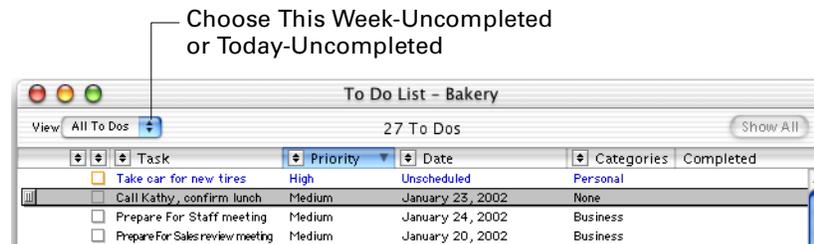


Click to create a To Do List item

The item you create appears as a bulleted item on that day in Month view.

Viewing To Do List items

To see your To Do List items in a list, choose To Do List from the View menu or click the To Dos button on the toolbar.

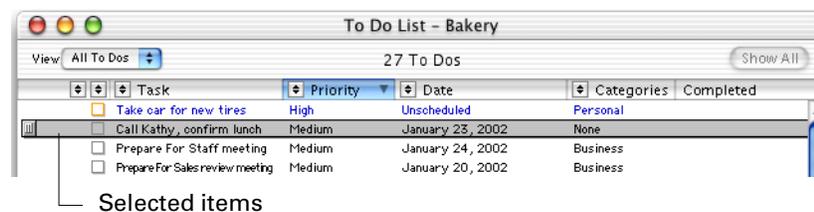


Two special views of your To Do List items are available by default. Choose This Week-Uncompleted or Today-Uncompleted from the View pop-up menu. The uncompleted items display.

For information about selecting items, or groups of items, see [Chapter 7](#).

Editing To Do List items

Before you can delete, duplicate, or change an item, you must select it. Show the To Do List, then click the item you want to select. Double-click to open the To Do List dialog box.

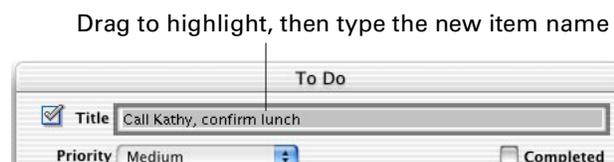


In the Date Book, you can also click a To Do List item to select it, and double-click to open it.

Changes to items are updated on your handheld the next time you perform a HotSync operation.

Renaming To Do List items

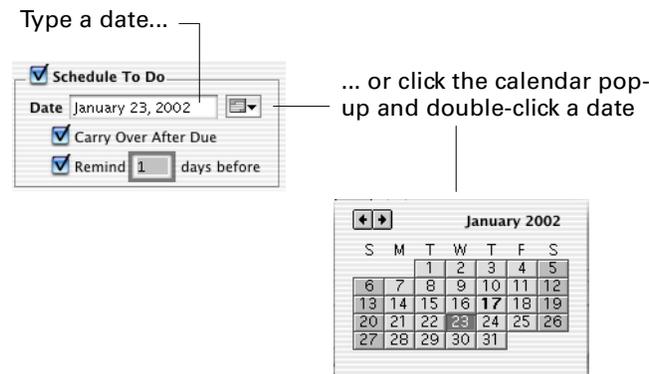
You can rename an item whenever you like. Double-click the item in To Do List or in one of the Date Book views, and then type the new name. Click OK.



The new name appears on the corresponding To Do List item on your handheld the next time you perform a HotSync operation.

Changing dates of To Do List items

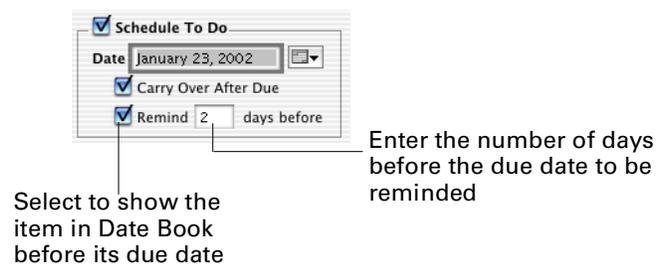
You can change the date of a To Do List item at any time. In the To Do dialog box type a new date, or choose a date from the calendar pop-up.



You can also quickly change the day an item is to be done in Date Book's Week or Month view by dragging the item from its current date to a new one.

Setting reminders for To Do List items

You can be reminded of upcoming To Do List items. To set reminders, create a new To Do List item or double-click an existing one. In the To Do dialog box, select the Remind check box. Type the number of days before the item due date you want to be reminded. For example, if you have an item due on Friday, and you want a reminder two days before that, on Wednesday, type 2 in the Remind box.



NOTE Reminders for To Do List items do not transfer to your handheld. To set an alarm for your handheld from the computer, create an event instead of a To Do List item.

Setting priorities for To Do List items

To prioritize To Do List items, in the To Do dialog box, choose a priority from the Priority pop-up menu.



The color of the box next to a item indicates the item's priority.

Palm Desktop priority	Palm Desktop color	Handheld priority
Highest	Red	1
High	Orange	2
Medium	Gray	3
Low	Green	4
Lowest	Blue	5

When you sort items, uncompleted items appear first, followed by the completed items. Within those two groups the items sort by priority, from highest to lowest.

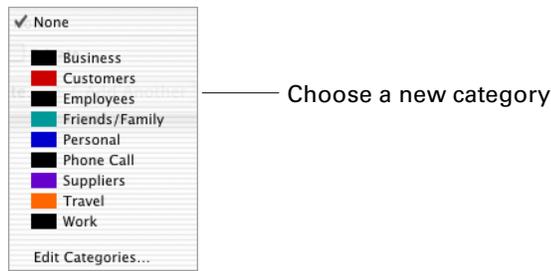
After a HotSync operation, the item appears in the To Do List application on your handheld with the priorities numbered.

Changing the interval of repeating To Do List items

You can change how often an item repeats in Date Book. In the To Do dialog box, choose a new interval from the Repeat Task pop-up menu. You may select the end date and change or delete it entirely. If you delete the end date, the item repeats indefinitely.

Adding or changing categories for To Do List items

To change a To Do List item's category, click the left Category pop-up menu in the To Do dialog box, then choose a different category. If you would like to add a second category selection or change an existing one, click the right Category pop-up menu and choose a category. The second category is not transferred to your handheld during a HotSync operation. If the item has a category selected and you want to remove the category, click the Category pop-up menu and choose None.



Categories are a useful way of organizing your To Do List items, providing more flexibility when you view or print your To Do List. For example, you could choose to view or print only items that relate to customers. You can add categories to fit your needs and even assign colors to categories.

Moving To Do List items in Date Book

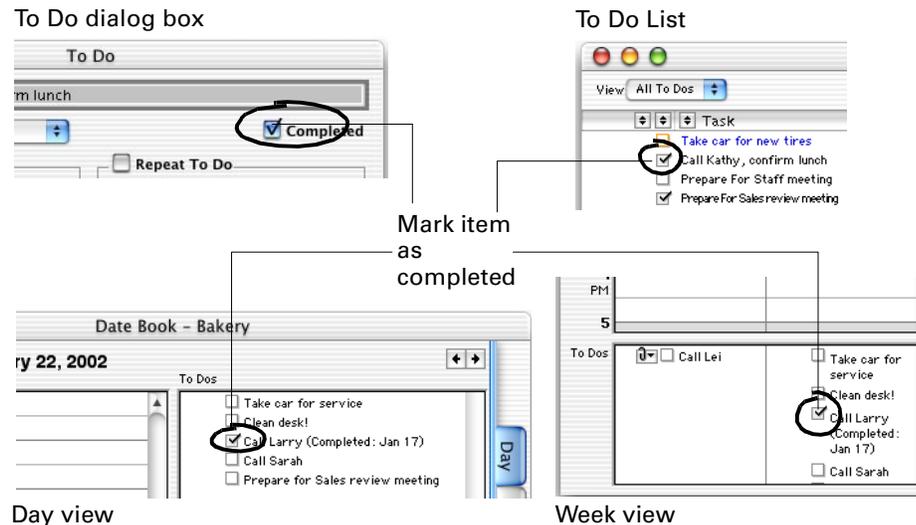
To help you see at a glance what you need to do, you can rearrange the listings of your items in the Day or Week views within Date Book. Click the item you want to move and drag it to its new position in the list.

You can also move a To Do List item from one date to another in Week or Month view by dragging the item from its current date to a new one.

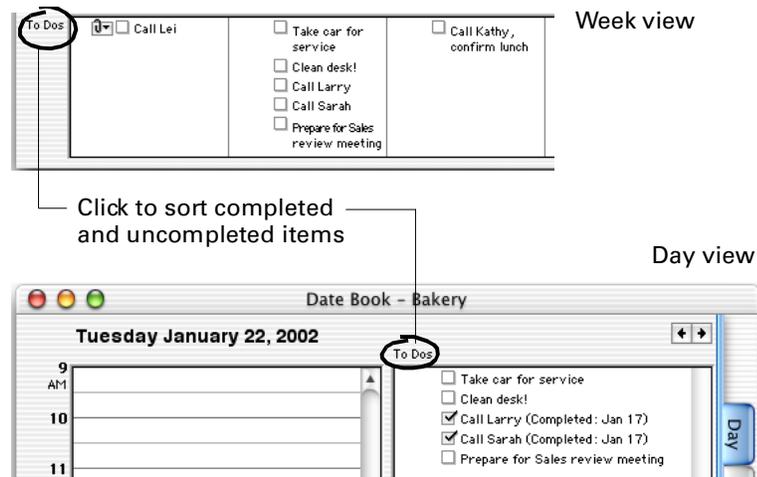
Marking completed To Do List items

After you finish an item, you can mark it as being completed. This is useful when sorting To Do List items—you can separate items which have been completed from those which haven't.

To mark an item as completed, select the Completed check box in the To Do dialog box. You can also select the box next to an item in To Do List, or in the Day or Week views in Date Book.



After you mark items as completed, you can sort the completed and uncompleted tasks in Day or Week view in Date Book by clicking the To Do label. The uncompleted items appear at the top of the list, and the completed items move to the bottom. Within those two groups, the items are sorted by priority, from highest to lowest.



The next time you perform a HotSync operation, the items are updated on your handheld.

Deleting To Do List items

To delete an item, click it in the To Do List, and then choose Delete from the Edit menu. You can also click the Delete button on the toolbar. Confirm your choice by clicking Delete when the dialog box appears. The next time you perform a HotSync operation, this item is deleted from your handheld.

You can also click the Delete button in the To Do dialog box to delete existing items.

For more information about archiving items you delete from your handheld, see [“Archiving data you delete from your handheld”](#) in [Chapter 12](#).

Transferring To Do List items to your handheld

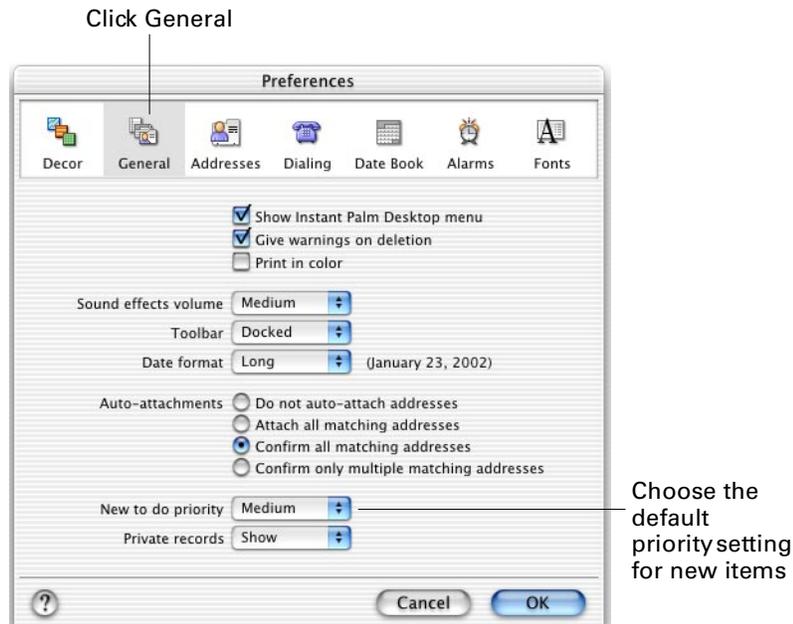
To Do List items are transferred to the To Do List application on your handheld when you perform a HotSync operation. This operation also moves new items from the To Do List on your handheld into the To Do List in Palm Desktop software, and synchronizes changes made in either the handheld or your computer.

The following list shows the details of the data transfer between your computer and your handheld:

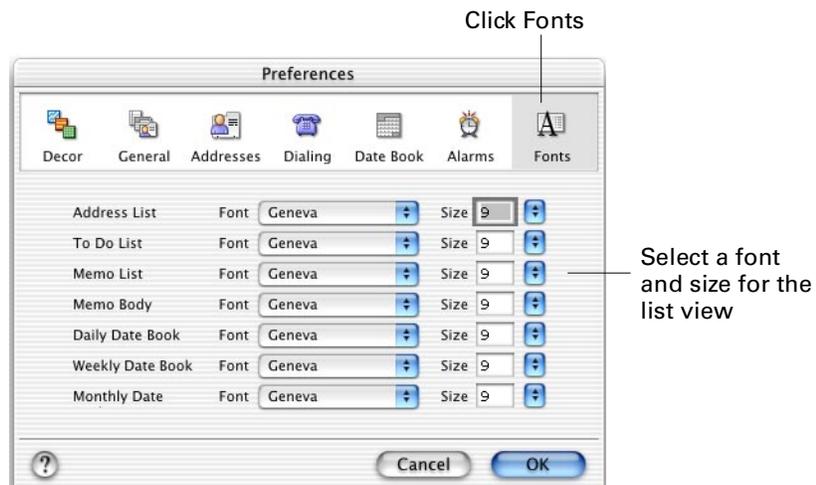
Palm Desktop software items	Transfer to To Do List on handheld as
Item text	Item text
Priority	Priority Lowest priority in Palm Desktop software transfers to priority 5 on the handheld; highest priority transfers as priority 1.
Completed check box	Completed check box
Item date	Date Due field
Carry Over After Due check box	Does not transfer to the handheld Items remain in the To Do List on the handheld regardless of their due dates.
Repeat To Do check box	A new To Do List item After the current task is marked complete, a HotSync operation transfers the next instance of the task to the handheld.
Categories	Category The first category you assign to the item is transferred to the handheld. The second category does not transfer. See “Transferring categories to your handheld” in Chapter 8 .
To Do List items created in Date Book	To Do List items To Do List items with due dates do not appear in the Date Book application on the handheld. If the Date Book on your handheld has Agenda View, however, you can view events and To Do List items together. (Agenda View is available on handhelds using Palm OS software version 3.5 or later.)
Remind check box	Does not transfer to the handheld An item created with a reminder setting transfers to the handheld, but no alarm is set on the handheld.
Private	Private
Attachments, such as memos, events, or addresses	Relationships do not transfer to the handheld The To Do List item and each attached item transfer to the handheld to their corresponding applications. The relationship between the items does not transfer.
File attachments	Do not transfer to the handheld

Setting preferences for To Do List items

You can set preferences for default To Do List item priorities, list fonts, and list font sizes, by choosing Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9.



Click Fonts to set font and font size information for list views.



Working with Lists

This chapter explains the basics of working with list views for addresses, memos, and To Do List items.

About list views

When you view lists of your addresses, memos, and To Do List items, you see the information in rows and columns. Each row represents a record. Each column represents a field used for typing and storing information about one of these records. You can double-click a record at any time to view or change it.

Memo list

Memo List - Bakery

View: All Memos 5 of 5 Memos Show All

Title	Date	Body	Categories
Another resolution list	January 1, 2002	Jan 1, 2002 12:05 AM: • Get more exe...	Personal
Notes for 1/10/02 Staff Meeting	January 9, 2002	We're doing very well, and things look good...	Business, Employees
Tire notes	January 16, 2002	The car's tires are worn out and need to be...	Personal

To Do List

To Do List - Bakery

View: All To Dos 8 To Dos Show All

Task	Priority	Date	Categories	Completed
<input checked="" type="checkbox"/> Make another resolution list	Lowest	January 1, 2002	Personal	January 12, 2002
<input type="checkbox"/> Take car for new tires	High	January 20, 2002	Personal	
<input type="checkbox"/> Prepare for sales review meeting	Medium	January 20, 2002	Business	

Address list

Address List - Bakery

View: All Addresses 23 of 23 Addresses Show All

Full Name	Company	Phone 1	Phone 2
<input type="checkbox"/> Kim Chen	The Candlelight Restaurant	W: (408) 555-0900	H: (503) 555-4655
<input type="checkbox"/> Mr. Dennis Copley Ph.D.	International Bakery	W: (913) 555-3234	H: (913) 555-8752
<input type="checkbox"/> Samuel Corning	International Bakery	W: (803) 555-7911	H: (513) 555-1987

NOTE A list view is not available for Date Book information (events).

Viewing a list

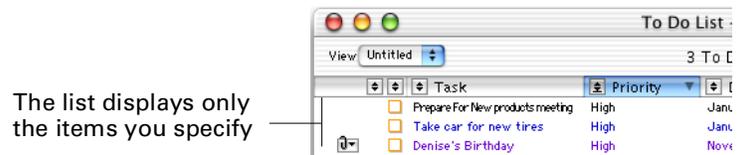
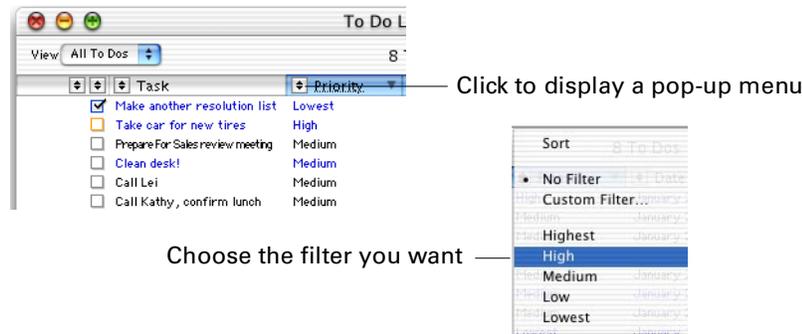
To display one of the list views, choose Address List, Memo List, or To Do List from the View menu, or click the Addresses, Memos, or To Dos buttons on the toolbar.



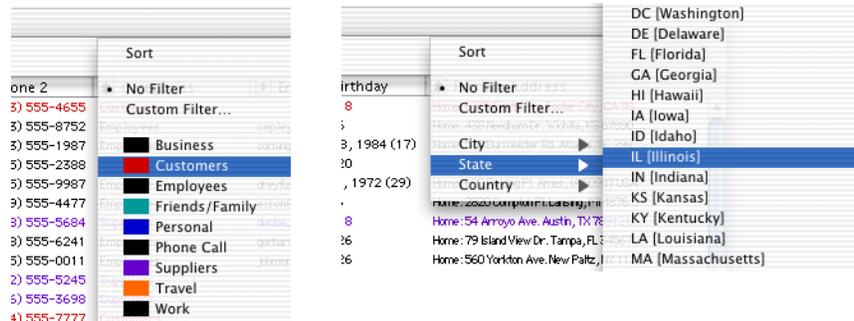
Viewing selected records

You can change a list to display only the records you want. By creating a filter, you can show certain records in a list while hiding others. You can type your own special criteria for the filter, or use preset choices. After you've done that, you can view and print only the special list of records you've created.

You create a filtered list by clicking the button next to a column heading and then choosing a filter from the pop-up menu. For example, you can show only your high-priority To Do List items.



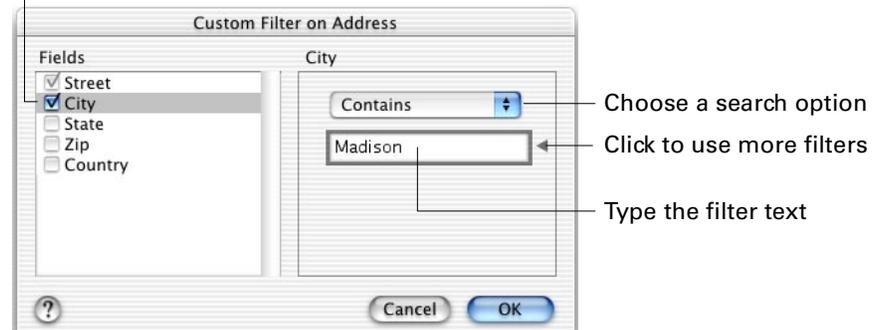
You can have more than one filter in effect at a time. For example, in your Address list, you could show just the customers in Illinois by choosing Customers from the Categories pop-up menu, and Illinois from the State pop-up menu.



Custom filters

If you don't see the filter you'd like in a pop-up menu, you can create your own custom filter. Choose Custom Filter from the pop-up menu, then choose the search option which best fits your needs.

Choose the field you want to use for your filter



NOTE Filters are not case-sensitive.

To display fields that	Choose	Example
Contain the filter text	Contains	To find all names with "son" in them, type "son." "Thompson," "Gleason," and "Sonders" are found.
Start with the filter text	Starts With	To find all the names that start with "son," type "son." "Sonders" is found, but not "Thompson."
End with the filter text	Ends With	To find all the names that end with "son," type "son." "Thompson" and "Gleason" are found, but not "Sonders."
Are exactly the filter text	Is	To find only the name "Sonders," type "sonders." Only those addresses with this name are found, but not "Thompson" or "Gleason."
Do not exactly match the filter text	Is Not	To find all addresses except those with the name "Sonders," type "sonders."
Do not contain the filter text	Doesn't Contain	To find all addresses except those with "son" in them, type "son." "Miller," "Jones," and "Smith" are found, but not "Thompson" or "Sonders."

To display fields that	Choose	Example
Are blank	Is Empty	Choose to find all addresses with a blank name field.
Are not blank	Is not Empty	Choose to find all addresses with a completed name field.

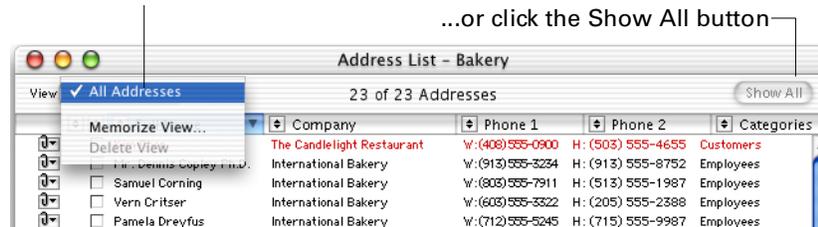
You can also use the Find feature to view selected records. For more information, see [Chapter 8](#).

NOTE After creating filters you can save the resulting view if you think you'll be using it again. See [“Memorizing views of selected data”](#) in this chapter for more information.

Removing filters

You can easily remove all filters to see all records by clicking Show All in the upper-right corner of the list window. Or choose All Addresses, All To Dos, or All Memos from the View pop-up menu in the upper-left corner of the window.

Choose All Addresses (or All Memos or All To Dos) from the View pop-up menu to see all items...

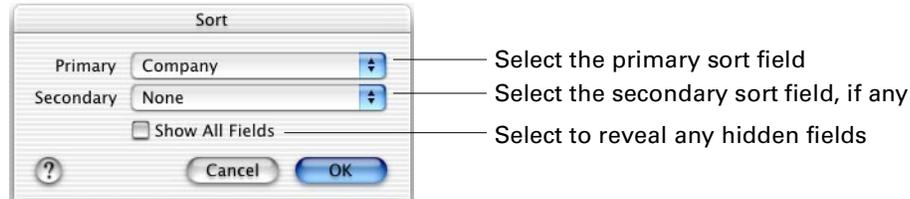


You can also remove a filter from a single field. Find the field that has the filter you want to remove (scroll left or right if necessary), click the  at the top of the column to see the filter pop-up menu, and choose No Filter. The filter is removed from that field, but it remains available in the filter pop-up menu in case you want to apply it again.

NOTE If you remove a filter from one field, filters on any other fields remain in effect until you remove them too.

Sorting lists

To sort a list by more than one column, choose Sort from the View menu. The Sort dialog box opens.



Select the primary and secondary sort fields from the pop-up menus. The lists are sorted first by the primary field, then by the secondary field.

For example, if you're working with the Address list and you want it sorted by company, choose Company as the primary sort. If you want the list further sorted by full name within each company, choose Full Name as the secondary sort.

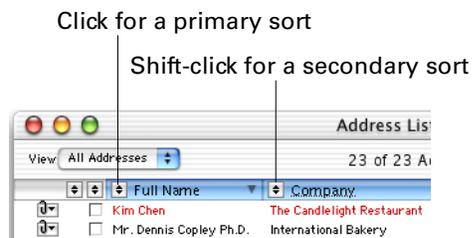
If you want to sort hidden columns, select the Show All Fields check box. For more information, see [“Selecting columns to display in a list”](#) in this chapter.

When your data is sorted, the field names you sorted by appear highlighted. A dotted underline appears beneath the field that is the secondary sort.

You can also sort using either of two shortcuts:

- Click the field name

Click the name of the field by which you want to sort. If you want a secondary sort, press the Shift key and click that field name.



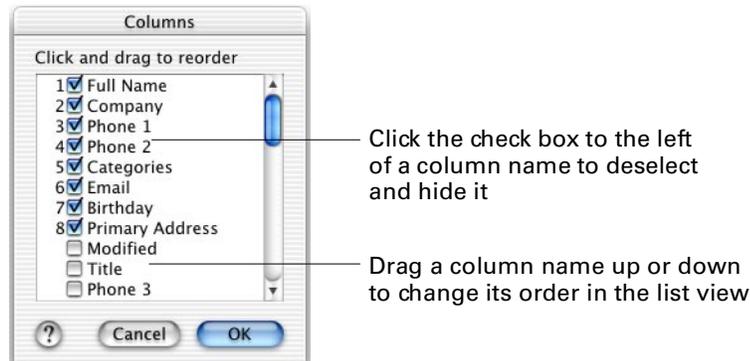
- Choose Sort from the pop-up menu

Click the  button at the top of the column next to the name of the field by which you want your data sorted, then choose Sort from the pop-up menu. A primary sort is performed on that field. If another field had previously been the primary sort, it becomes the secondary sort field.

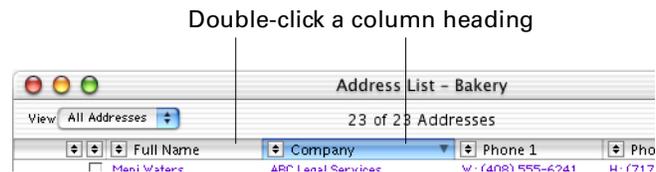
Selecting columns to display in a list

You can choose which columns you want to display in a list view. You can also change the order in which the columns display.

First, display an address list, memo list, or To Do List. Then choose Columns from the View menu.



You can also open the Columns dialog box by double-clicking a column heading (this action also sorts records by that column).



Resizing and reordering columns

You can resize the width of the columns and reorder the columns in a list.

To reorder columns, click a column name and drag it to the left or right just beyond the point where you want it to be. You see a pointer as you drag.

To resize a column, drag the right border of its column heading.

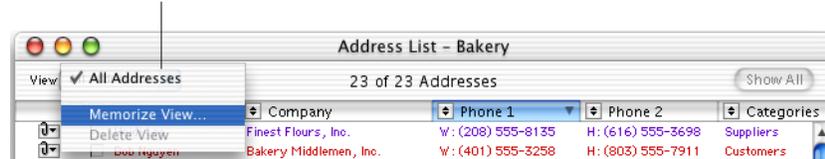


Memorizing views of selected data

After you've specified filters to view only portions of your information, you can save this subset as a view. You can create as many views as you like.

Choose Memorize View from the View pop-up menu in the upper-left corner of the list window.

Use filters to select the data to display, and then choose Memorize View from the View pop-up menu



Enter a name for the view, and select the memorize options you want.



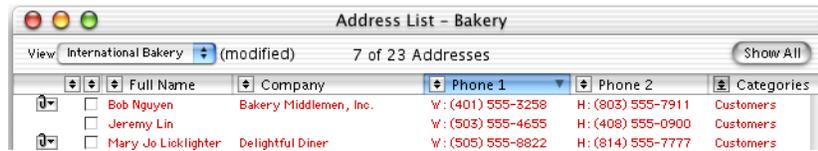
Select	To remember
Current Sort	Data sorted as it is now
Column Arrangement	Current column order and which columns are visible
Window Positions	Current window positions and window size

After you name a view, it appears in the View pop-up menu. It also appears in the View menu in the menu bar, so you can see this saved view at any time.

There are two To Do List views in the View pop-up menu already created for you: This Week-Uncompleted and Today-Uncompleted. By choosing either of these two views you can easily see what tasks you still need to accomplish.

Changing memorized views

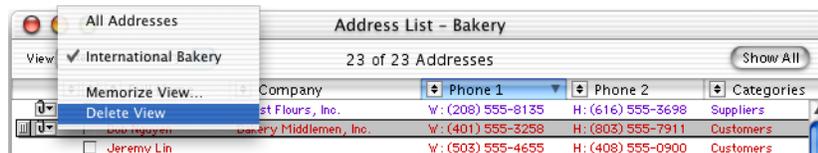
To change a memorized view temporarily, choose it from the View pop-up menu, then create additional filters or change existing ones. After you change the current view, the word “modified” appears to the right of the View pop-up menu.



- If you want to save this new view, choose Memorize View from the View pop-up menu, then enter a name for this view in the Memorize View dialog box.
- If you want to re-use the current view name, enter it if it does not already appear, click OK, and then click Replace in the alert box.

Deleting memorized views

To delete a memorized view, choose it from the View pop-up menu, then choose Delete View.

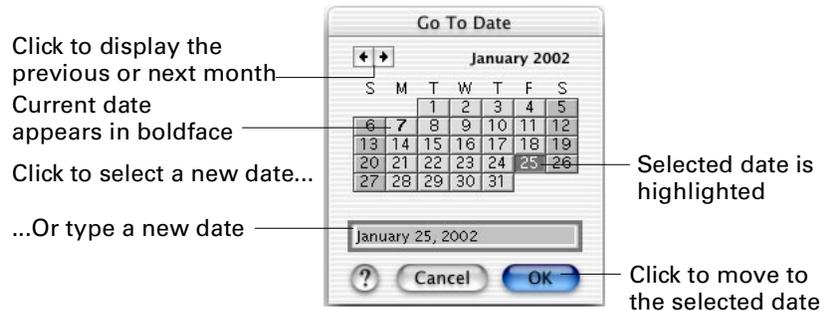


Finding and Categorizing Information

This chapter explains the basics of finding and categorizing information.

Going to a specific date

You can go to a specific date by choosing Go To Date from the Locate menu or by clicking the Go To button on the toolbar.



When you specify a date in the text box, you can type it in the following formats:

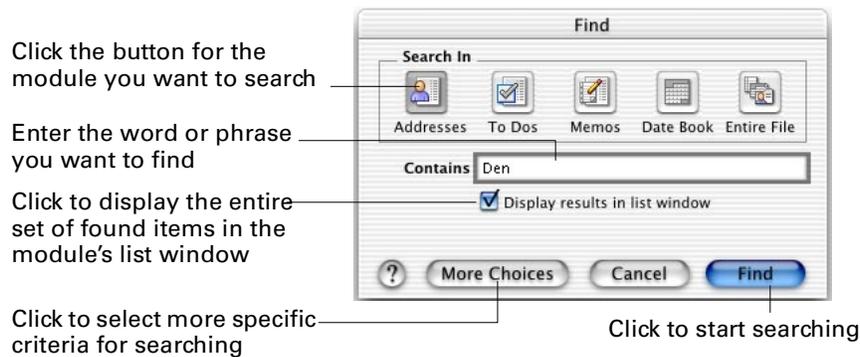
- Long format: month,day,year
- Short format: mm/dd/yy, mm dd yy, or mm.dd.yy

In the Go To Date dialog box, press ⌘-Left Arrow to display the previous month and ⌘-Right Arrow to display the next month. Press the Minus key to move the highlight to the previous day and the Plus key to move the highlight to the next day.

To go to the current date, choose Today from the Locate menu or click the Today button on the toolbar.

Finding text

You can search one module at a time or all of them for information. Choose Find from the Locate menu or click the Find button on the toolbar. The Find dialog box appears.

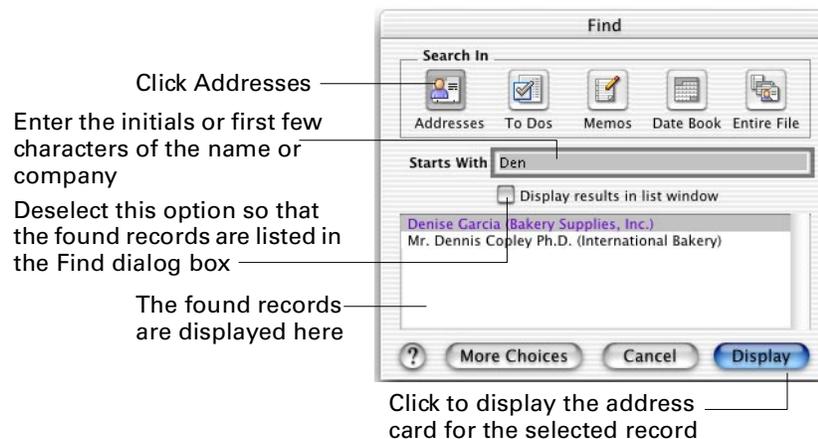


To repeat the search, choose Find Again from the Locate menu.

Finding addresses quickly

If you are searching for addresses and want to see the names of the Address Book items in the Find dialog box, deselect Display Results in List Window.

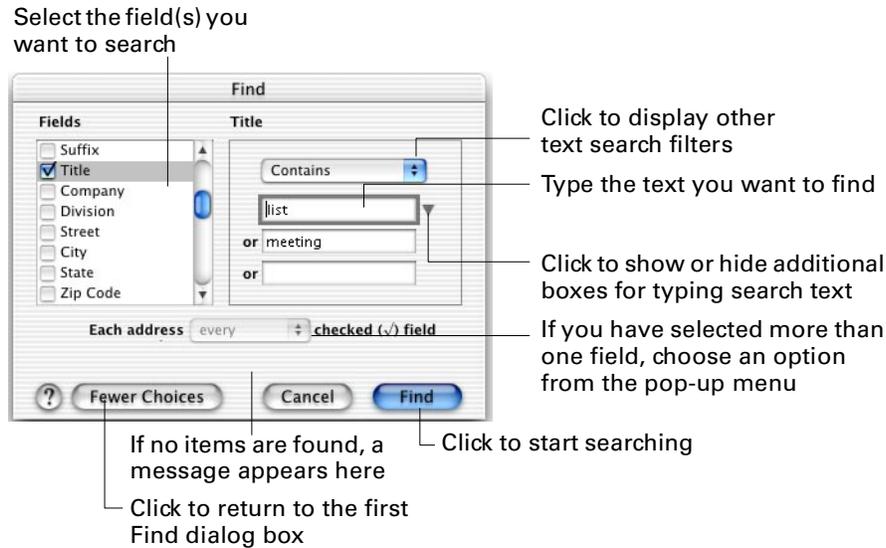
When you do this type of search, only the Name, Company, and Nickname fields are checked, and only text that starts with what you type is found.



Setting search options

When you click More Choices in the Find dialog box, you see another dialog box with options that vary according to the module you selected. You can use these options to narrow your search.

The content of the right side of the dialog box changes according to what is selected in the left side of the dialog box. For example, if you select Memos, and then select the Memo Title field, the dialog box looks similar to the following illustration.



To repeat the search, choose Find Again from the Locate menu.

NOTE Doing a search using this dialog box is similar to using the Custom Filter option in the pop-up menus in the address list, memo list, and To Do list. You can save the search criteria when you memorize a view. See [Chapter 7](#) for more information.

Displaying recent records

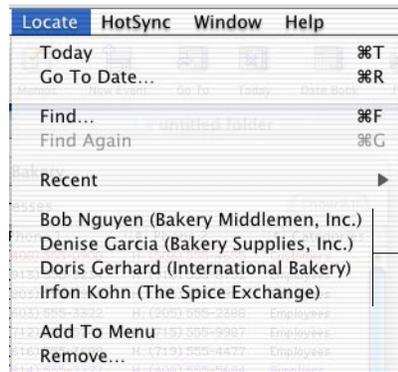
The Recent submenu lists the last 20 records you created, selected, or viewed. To display an item you recently used, choose Recent from the Locate menu and then choose an item from the submenu.

Finding frequently used records

If you frequently search for a certain item, such as a customer account or memo on a project, you can put its name in the Locate menu. The items are listed in the order that you add them to the menu. You can add up to 20 items.

NOTE If you frequently look up information about certain people, add their addresses to the Instant Palm™ Desktop menu, so you can access the information quickly. See [Chapter 13](#) for more information.

To add an item to the Locate menu, select the record, and then choose Add To Menu from the Locate menu. To remove a record from the Locate menu, choose Remove from the Locate menu. Select the record you want to remove and click Remove.



Items you add to the Locate menu are listed here

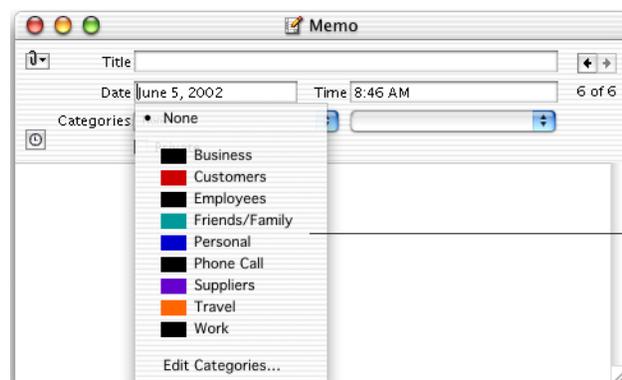
Working with categories

You can assign records and other data to categories. Categories are color-coded so you can easily distinguish groups of records, such as projects or vendors. When records are assigned a category, you can easily search for different groups of items and quickly apply filters when you are viewing records in a list.

Assigning records to categories

Create or select a record. In the dialog box or information card, choose a category from one or both of the Categories pop-up menus.

To assign several records to a category at one time, select the records by \mathbb{A} -clicking them or by holding down the Shift key and selecting the first and last item in a block. Then choose Categories from the Edit menu and a category from the submenu. If an record already has been assigned a category, the new category is displayed in the second Categories pop-up menu.



Categories pop-up menu in a memo

NOTE To remove a record from a category, choose None from the Categories pop-up menu.

Creating categories

There are several preset categories, such as Customers and Friends/Family. You can create your own categories.

Create or select a record and then choose Edit Categories from the Categories pop-up menu.

NOTE To create categories when an item is not selected, choose Categories from the Edit menu and then Edit Categories from the submenu.



Transferring categories to your handheld

Categories are transferred to your handheld when you perform a HotSync® operation. This operation also moves new categories from the handheld applications into the Palm Desktop category list.

The handheld supports 15 separate categories plus the category “Unfiled” for the To Do List, Address Book, and Memo Pad (Date Book categories are not available on the handheld). When transferred to Palm Desktop software, the categories are combined into a single list. Categories with no items assigned to them are not transferred to your handheld. Categories for events are not available on your handheld.

To best use categories between your handheld and your computer, use the first category in Palm Desktop software to identify how you want the items grouped when they are transferred to the handheld. Then use the second category to indicate the more refined groups you may want to use for searching and printing features in Palm Desktop software.

If you move an item on your handheld to a different category, and then perform a HotSync operation, the item is moved to the new category in Palm Desktop software.

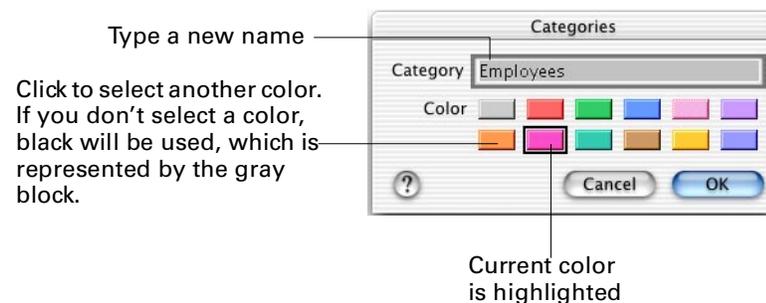
The following list shows the details of the data transfer for categories between your computer and your handheld:

Palm Desktop software categories	Transfer to handheld as
First category	Category Each application on the handheld can store up to 15 categories. If more categories with records assigned to them are found in Palm Desktop software, the records in the 16th and later categories are placed in the Unfiled category on the handheld.
Second category	Does not transfer to the handheld
Category colors	Do not transfer to the handheld

Changing category name or color

You can change the name of a category, including the preset categories, or the color you've assigned to it.

Choose Categories from the Edit menu, and then Edit Categories from the submenu. In the Edit Categories dialog box, select the category you want to edit and click Edit. The Categories dialog box appears. The currently selected Decor affects the colors you see in the dialog box.



Changing a category name affects all of the items assigned to that category.

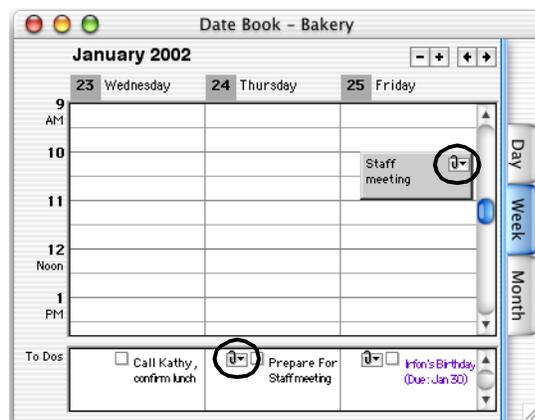
Deleting categories

You can delete categories you don't use, including the preset categories. In the Edit Categories dialog box, select the category you want to delete and click Delete.

Working with Attachments

Attachments are connections between related Palm™ Desktop records, and between records and files in other applications on your computer. Attachments help you access information where and when you need it. For example, you can create a To Do List item to phone a client and attach this item to the client's address card so that the information you need about the client will be available during the phone call. Attachments can be created automatically for you, or you can create attachments on your own.

When an item has attachments, a paper clip pop-up menu appears next to it.



The number next to the paper clip pop-up menu shows how many attachments the item has.

NOTE Only attachments connected to events are printed.

Transferring attachments to your handheld

Attached memos, events, addresses, and To Do List items are transferred to the corresponding application on the handheld when you perform a HotSync® operation, but the relationship between the items does not transfer.

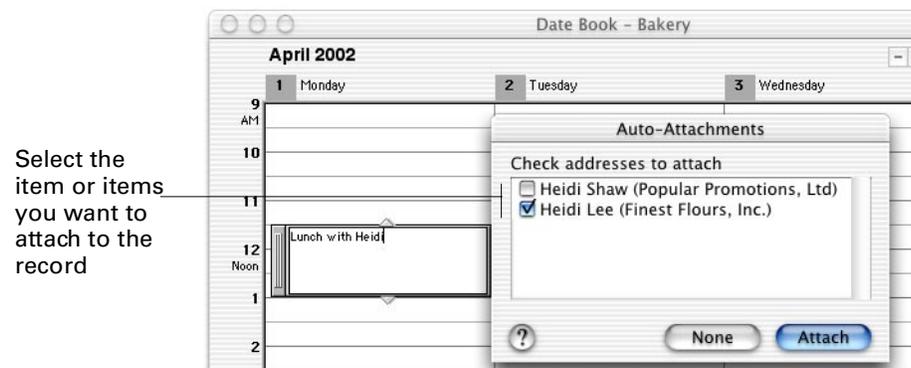
For example, let's say you create an address for a new customer. At the same time you schedule a visit to the customer in Date Book and create a memo describing the sales information you want to bring to the customer. You attach the event and memo to the address card for the customer.

When you perform a HotSync operation, the address, memo, and event transfer to the corresponding applications on the handheld. Looking up the customer in the Address Book in the handheld, you see the customer's information. To see the memo and event, you must look them up in the Memo Pad and Date Book applications respectively. The relationship between the different information types is not available between the handheld applications.

If, on your handheld, you add a note to an Address Book, Date Book, or To Do List item, the information appears as an attached memo in Palm Desktop software when you perform a HotSync operation. The attached memo appears with the title "Handheld Note: XXX."

Automatic attachments

When you create a new record in Palm Desktop software, if there are addresses that match the record's content, you are prompted to attach the addresses to the new record. For example, if you created an event called "Lunch with Heidi" and your Address Book includes Heidi Shaw and Heidi Lee, the Auto-Attachments dialog box opens.



If you don't want to see this dialog box, you can change the way attachments are created. For more information, see "[Setting attachment preferences](#)" in this chapter.

Creating attachments

You create an attachment when you want to associate one record with another, or a record to a file on your computer.

Attaching one existing record to another

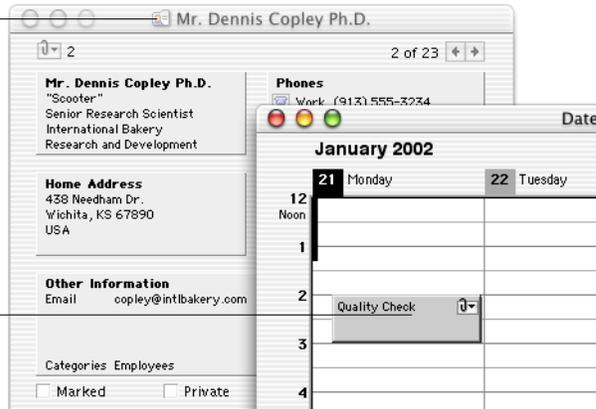
The easiest way to create an attachment is to drag an existing record onto another record using the icon in its title bar. For example, you can drag an address card onto an event to attach the two to each other.

There are five ways to attach an existing item to another existing item:

- Locate both records, arrange the windows so both are visible, then drag and drop one onto the other. If you want to attach two records of the same type, such as a To Do List item to another To Do List item in the task area in Date Book, press Option as you drag.

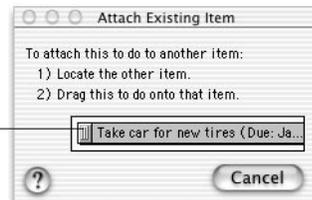
Click the icon in the title bar. Wait for the icon to darken, and then drag the record to the one you want to attach it to

Release the mouse button to create the attachment



- Locate the first record, choose Existing Item from the Attach to submenu, locate the second record, then drag from the Attach Existing Item palette onto the second item. This method is often easier to use because you manipulate the windows less.
- Locate the first record, choose Attach to from the Create menu, and then choose Existing Item. The Attach Existing Item dialog box appears.

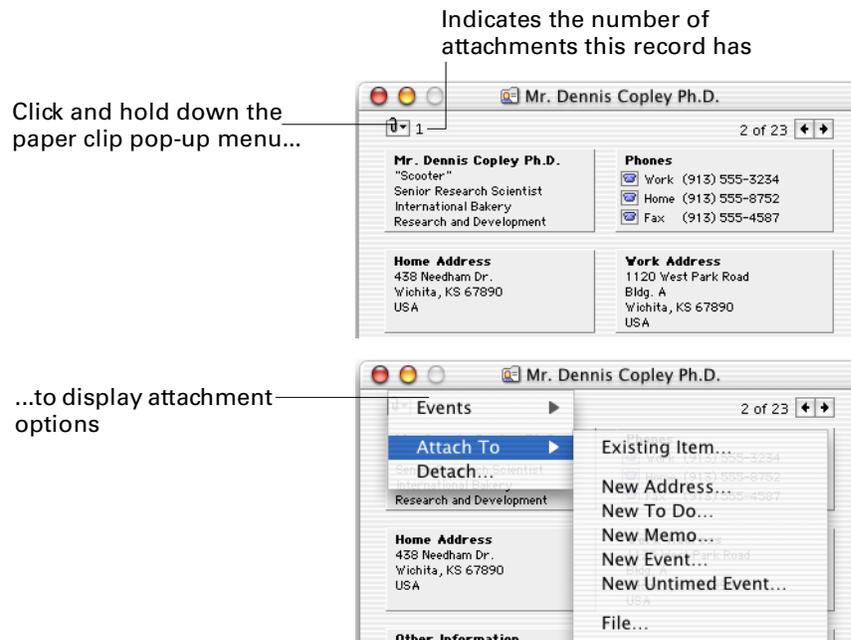
You can drag the gripper in this dialog box to create the attachment



This method allows you to create an attachment in separate steps; you can open the window that contains the second record after you choose the first item and the Existing Item option.

- Select an existing record, choose Attach from the Create menu, and then choose Instant Attach. If there is an address record that matches the record, it is offered as an attachment.

- Locate the first record, click and hold the paper clip pop-up menu , select the Attach To operation, and then the Existing Item submenu.



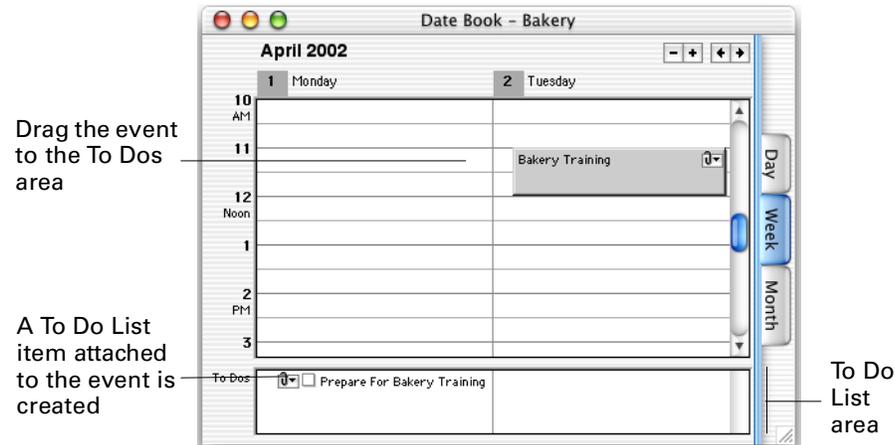
Attaching new records to existing records

To create a new record and automatically attach it to an existing record, select the existing record and choose Attach to from the Create menu (or from the paper clip pop-up menu). Then choose New Event, New To Do, New Address, New Memo, or File. Or, drag the existing item to the New Event, New To Do, New Address, or New Memo button on the toolbar.

The new item is named by default. For example, if you have an Address Book item named Susan Shaw and you select that item and choose New To Do from the Attach to submenu, the To Do List item is automatically named “Call Susan Shaw.” You can type over the name if you want to change it. You can also drag an address record onto the events area of Date Book to automatically create an event named “Meeting with” followed by the person’s name.

When you finish creating the new record, it is attached to the existing record you selected.

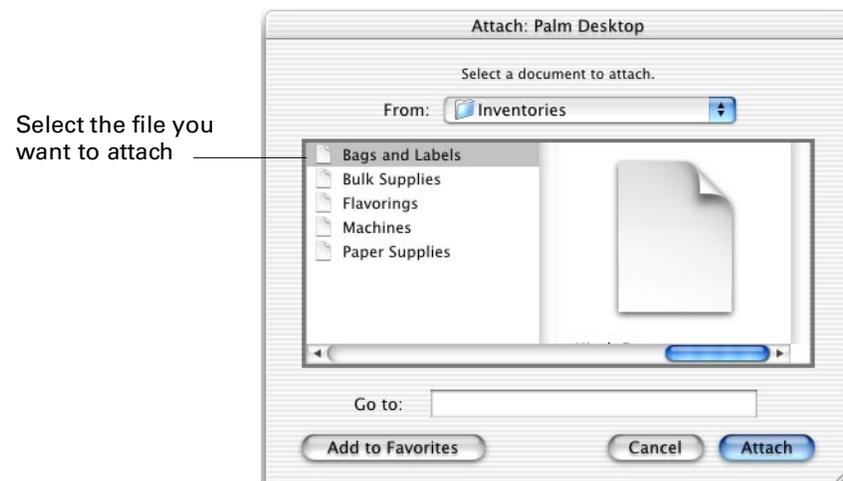
You can create To Do List items related to existing events in Date Book. Just drag the event to the To Do List area of the appropriate day, and a new To Do List item attached to the event is created. You can type over the default name if you want to change it.



You can also create an event related to a To Do List item by dragging an item to the events area of the calendar.

Attaching files to a record

To attach any file on your computer to a record, select the record, choose Attach from the Create menu, and then choose File. Find the file you want, and then click Open.



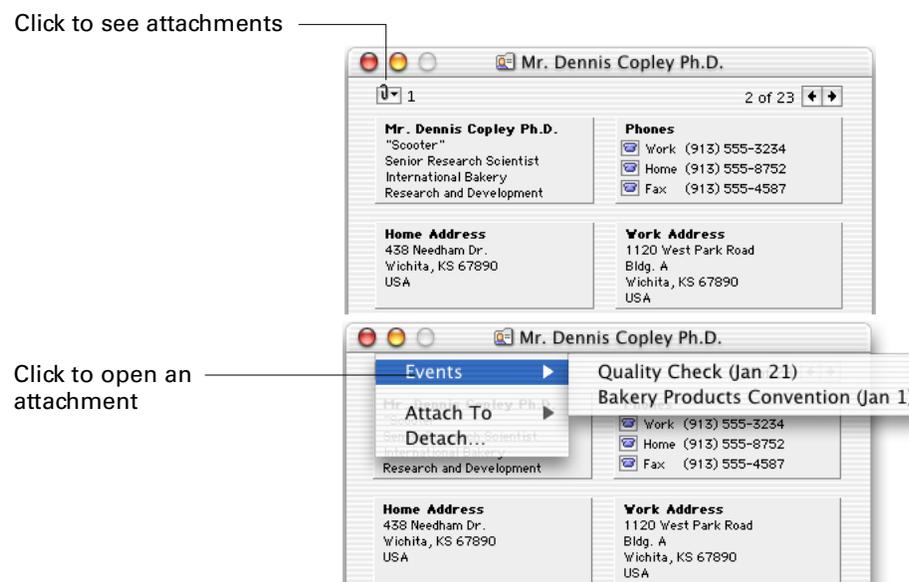
After you attach a file to a record, the filename appears in the record's paper clip pop-up menu. When you select the file from the record's paper clip pop-up menu, the application the file was created in launches, if necessary, and the file is opened.

You can also attach a word processing document to an Address Book item to have information about the person copied into the document automatically. See [Chapter 3](#) for more information.

NOTE Attached files are not transferred to your handheld in a HotSync operation. The existing record is transferred, but the file attached to it is not.

Viewing attached records

Click a record's paper clip pop-up menu to see a list of the items attached to it. If there is more than one attachment, they are organized in submenus. Click the appropriate submenu to open an attachment.



Detaching or deleting records

To detach a record or to delete an attached record, click a record's paper clip pop-up menu and choose Detach. The Detach dialog box appears.

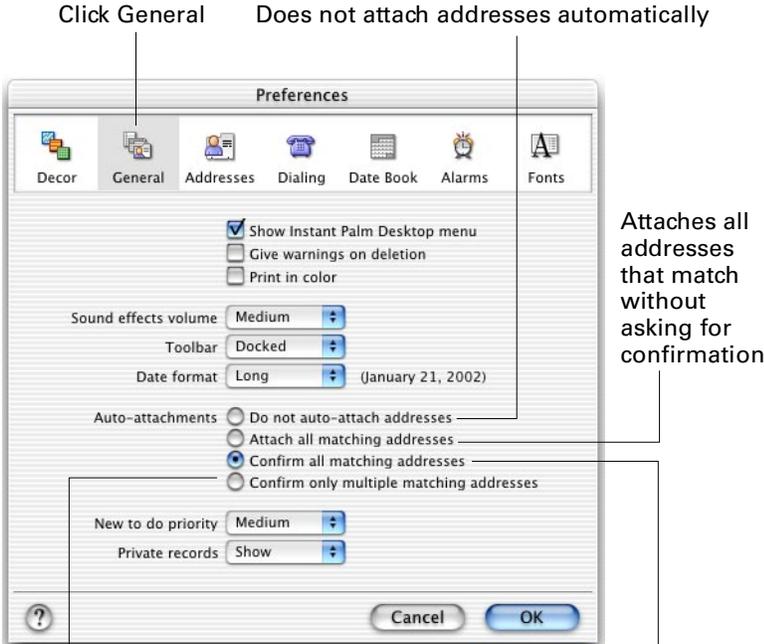


NOTE The next time you perform a HotSync operation, the item you deleted is deleted from your handheld. Detached items are not deleted from your handheld.

Setting attachment preferences

You can set preferences for how attachments to addresses are created.

Choose Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9.



Automatically attaches an address if there is only one match; asks for confirmation if there is more than one match

Always confirms attachments with you before attaching, even if there is only one possible match

Importing and Exporting Data

This chapter explains the basics of importing and exporting data.

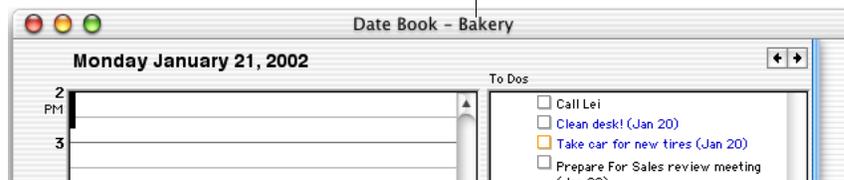
Migrating data from Claris Organizer

To convert a Claris Organizer file to Palm™ Desktop format, all you need to do is open the file in Palm Desktop software. To have the Claris Organizer data be included in the Palm Desktop data file that is synchronized with your handheld, follow these steps:

1. Make a backup copy of your Claris Organizer data file.
2. Open Palm Desktop software.
3. Verify that the file you use to synchronize with your handheld is open.

The name of the data file appears in the title bar of the Palm Desktop software windows and this same username appears in the user pop-up menu on the toolbar.

The name of the current data file appears in the title bar of each window



4. Choose Merge from the File menu.
5. Select your Claris Organizer data file.
6. Click Open.

Your Claris Organizer data has been merged into your data file. Perform a HotSync® operation to transfer this information to your handheld.

Importing data

You can import data from any of the following PIM (personal information manager) products.

- Address Book Plus
- Now Contact
- DateBook Pro
- Now Up-to-Date
- DayMaker
- QuickDex
- DynoDex
- TouchBase Pro
- Meeting Maker
- vCard/vCal compatible PIMs

To import data from PIM product files, you must export and save the entire file in tab-delimited text format first. You can import fields from TouchBase Pro, DateBook Pro, DayMaker, and QuickDex files in the proper order. You might have to adjust the field order of other PIM product files you import.

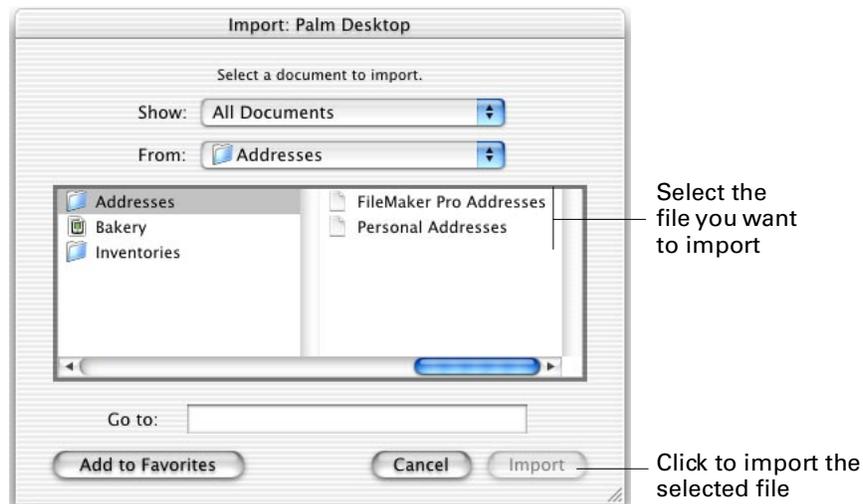
This imported data is transferred to your handheld when you perform a HotSync operation.

You can import data from other applications as long as you can export the data from the application as a tab-delimited text file. For example, you can import data from an Microsoft Excel workbook file in which you keep names and addresses.

You can also import data from a FileMaker Pro database or a ClarisWorks database. In FileMaker Pro, be sure to export the database to the Tab-Separated Text file type. In ClarisWorks, be sure to save the database in ASCII text format and give it a different name so you don't overwrite the original file.

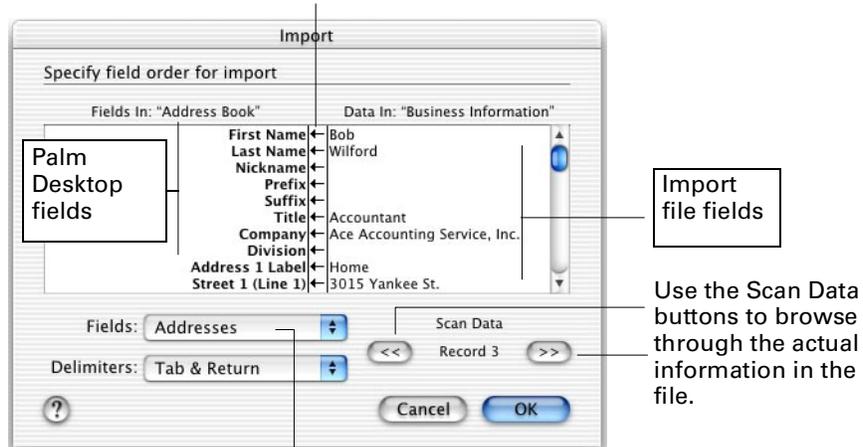
You can import data from a Newton using Newton Operating System 1.0. Simply use the Newton Connection Kit to export data from the Newton Names File, Date Book Calendar file, and Notepad and then import the resulting files into Palm Desktop software. The Newton Connection Kit does not work with Newton Operating System 2.0.

To import a file, export a text file from the other product and then choose Import from the File menu in Palm Desktop software.



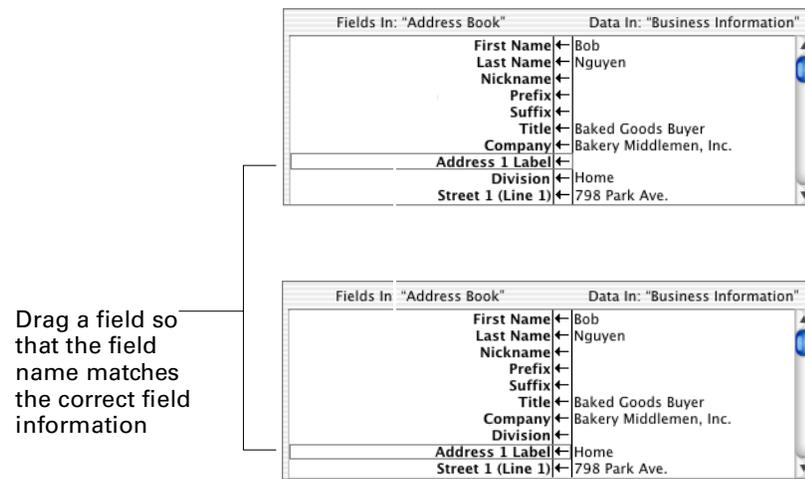
The Import dialog box appears. In the Import dialog box, you can scan the data in the file and remap the way the fields are imported. Your screen may look different depending on the product you exported from.

To omit a field, click the arrow next to it (this deselects the arrow and leaves a dotted line).



These fields are set automatically for some file types. If you are importing another file type, set Fields appropriately and set Delimiters to Tab & Return.

Use the Scan Data buttons to browse through the actual data in the file and change the way the fields map, if necessary.



vCard and vCal files

Dragging a vCard file into Address Book or a vCal file into Date Book automatically creates one or more new records in the module, depending on how many records the vCard or vCal file contains. You can also import vCard or vCal files by choosing Import from the File menu and selecting and opening the files.

Exporting data

You can export data from Palm Desktop software so you can use the data in other applications. Check the documentation for the application you want to import the data into to find out what order the fields should be in and what delimiters you should use.

Exporting Address Book items as a vCard file

vCard enables you to export the data in one or more Address Book items in a standard format. A vCard file (extension: VCF) can be easily imported into any application that supports the vCard standard.

Exporting Date Book events as a vCal file

vCal enables you to export one or more Date Book events in a standard format. A vCal file (extension: VCS) can be easily imported into any application that supports vCal.

Exporting data from Palm Desktop software

To export a subset of records from a module, open the module's list view and filter the list to display only the records you want to export. Choose Export from the File menu. The Export dialog box appears.

Select the module you want to export records from



Specify whether you want to export all records from the module or only the ones displayed in the list window

Choose if you want to select the fields and the field order in the dialog box itself (see below)

Choose the delimiters required by the other application

If you want to do a custom export, choose Custom for Column Options, then select the fields and the field order in the dialog box. This option is not valid for vCard or vCal files. When you are finished, click OK to close the Column Options dialog box.



To omit a field, deselect the arrow next to it

To change the field order, drag field names to different positions

Select the format of the exported file. You may choose from the following formats:

This option	Exports data in this format
Tab and Return	Tab-delimited file in ASCII (text) format
Palm Desktop	An archive file, which varies depending on the module you export from
vCard	VCF format, available only for Address Book items
vCal	VCS format, available only for Date Book events

Dragging records outside Palm Desktop software to copy them

You can drag a record from a list view to the desktop or to another application, such as Microsoft Word or Excel. This action creates a copy of the record. Choose the list view or Date Book view you want from the View menu, and then position the mouse pointer on the record you want to copy. Drag the record to the desktop or to another open application.

You can also copy an open Address Book item or memo. Click the icon in the title bar of the dialog box and hold until the icon darkens. Drag the icon to the desktop or to another application.

NOTE This operation is not the same as dragging a record from one module to another within Palm Desktop software, which creates an attachment.

The results vary depending on the kind of record you drag and the location you drag it to.

If you drag	To Mac desktop	To an application
Address Book item	vCard file (VCF)	vCard file (if supported by the application); otherwise, the entire record as text*
Date Book event	vCal file (VCS)	vCal file (if supported by the application); otherwise, the description of the event as text*
To Do List item	text clipping	text
Memo	text clipping	text

*If the record is copied as text and you want a vCard or vCal file, try dragging the record to the desktop first, and then dragging it to the application.

This chapter explains the basics of printing. For information on double-sided printing, see [Appendix A](#).

About printing

You can print:

- Date Book views
- Day planner pages
- To-do lists
- Address lists
- Address books
- Envelopes
- Mailing and return address labels
- Fax cover sheets
- Memos

You can also create or customize printing layouts for your specific needs.

First, perform a HotSync® operation to transfer the information from the handheld to your computer, then print as described in these topics.

NOTE Decors change the onscreen appearance only. They have no effect on printing.

Selecting records

When printing addresses, To Do List items, or memos, you can choose between printing all the information in your file, or only some of it.

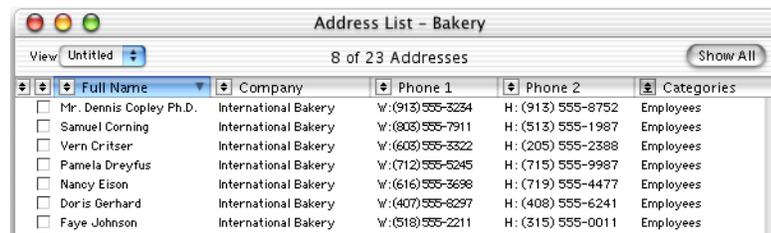
There are four ways you can select which items you want to print:

- Creating a filter
- Using the Find feature
- Clicking to select items in a list
- Marking (addresses only)

Choose Address List, Memo List, or To Do List from the View menu. After you view your data as a list, you can select the items you want to print.

Filtering

You can use filters to show only a portion of your addresses, memos, or To Do List items. For example, you could create a filter to show only the addresses with the category “Employees.” After you do that, the list view shows only the addresses in that category.



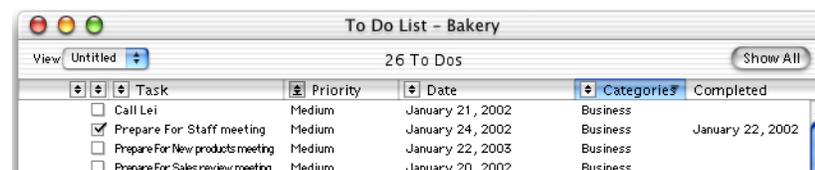
	Full Name	Company	Phone 1	Phone 2	Categories
<input type="checkbox"/>	Mr. Dennis Copley Ph.D.	International Bakery	W: (913) 555-3234	H: (913) 555-8752	Employees
<input type="checkbox"/>	Samuel Corning	International Bakery	W: (803) 555-7911	H: (513) 555-1987	Employees
<input type="checkbox"/>	Vern Critser	International Bakery	W: (603) 555-3322	H: (205) 555-2388	Employees
<input type="checkbox"/>	Pamela Dreyfus	International Bakery	W: (712) 555-5245	H: (715) 555-9987	Employees
<input type="checkbox"/>	Nancy Eison	International Bakery	W: (616) 555-3688	H: (719) 555-4477	Employees
<input type="checkbox"/>	Doris Gerhard	International Bakery	W: (407) 555-6297	H: (408) 555-6241	Employees
<input type="checkbox"/>	Faye Johnson	International Bakery	W: (518) 555-2211	H: (315) 555-0011	Employees

To print these records, choose the Addresses in List option from the Which Addresses pop-up menu in the Print dialog box.

For more information on creating list view filters, see [Chapter 7](#).

Finding

You can use the Find command in much the same way as you use a filter. For example, you could find only the To Do List items with a priority of “medium.” After you do that, the list view shows only those items with priorities set to medium.



	Task	Priority	Date	Categories	Completed
<input type="checkbox"/>	Call Lei	Medium	January 21, 2002	Business	
<input checked="" type="checkbox"/>	Prepare For Staff meeting	Medium	January 24, 2002	Business	January 22, 2002
<input type="checkbox"/>	Prepare For New products meeting	Medium	January 22, 2003	Business	
<input type="checkbox"/>	Prepare For Sales review meeting	Medium	January 20, 2002	Business	

To print these records, choose the To Dos in List option from the Which To Dos pop-up menu in the Print dialog box.

For more information on using the Find feature, see [Chapter 8](#).

Selecting records to print

You can select records by viewing a list, pressing and holding the **⌘** key, and clicking the records you want to print so they are highlighted in color. The records don't have to be next to each other when you select them. This is a good temporary way to select individual records. These selections are not saved when the file is closed.



Selected items

To print the selected records, choose the corresponding option in the selection pop-up menu in the Print dialog box.

For more information on selecting items, see [Chapter 7](#).

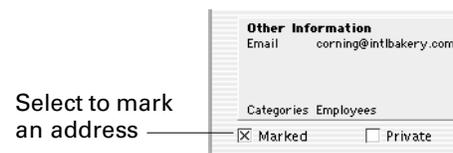
Marking addresses

If you are working with addresses, you can select records more permanently by marking them. To mark records, view the address list, then click the boxes next to the records you want to print.



Marked address

You can also mark an address from the address card.



Select to mark an address

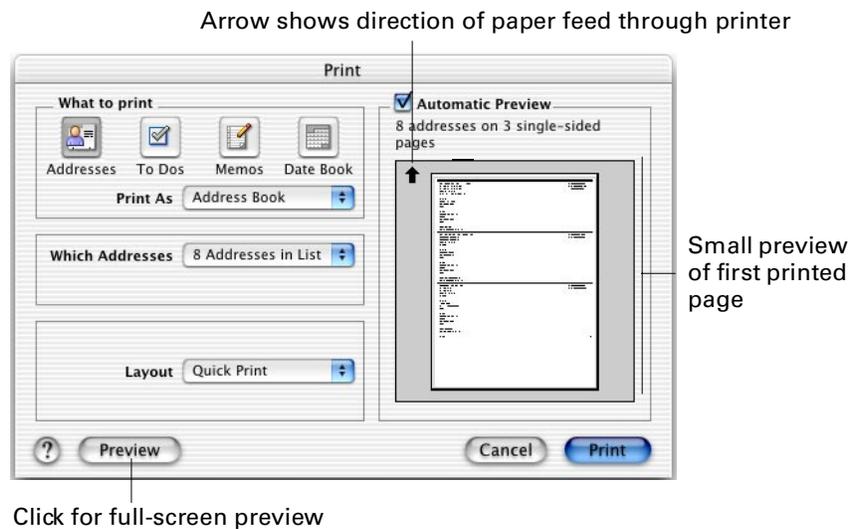
To print the marked records, choose the option for Marked Addresses in the Which Addresses pop-up menu in the Print dialog box.

Marked addresses stay marked after the file is closed. For more information on marking addresses, see [Chapter 3](#).

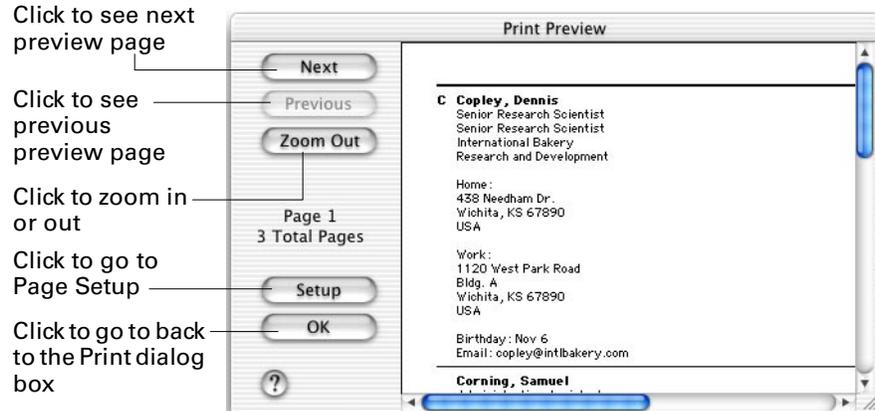
Previewing information

You can preview information before you print it. This is helpful so you can see the effect different printing options have before you print.

The Automatic Preview section in the Print dialog box shows a sample of the first printed page. This small view is based on the current settings in the Print dialog box. If you don't want to see the preview sample, deselect the Automatic Preview check box.

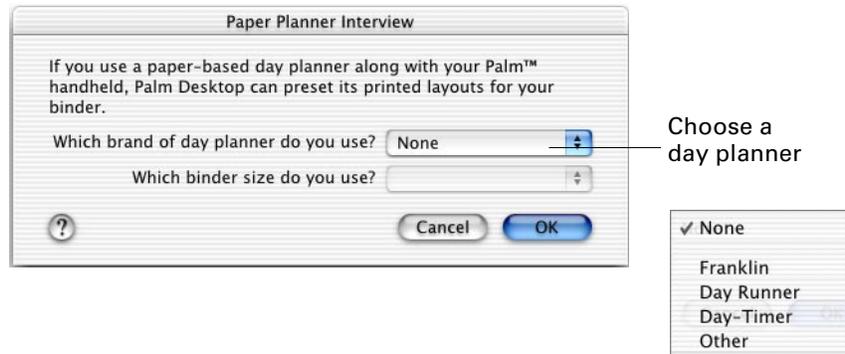


If you want to see a larger preview, or you want to preview more than the first page of the printed information, click the Preview button, or click once in the preview sample when the pointer becomes a magnifying glass. A dialog box opens showing you a larger preview.



Setting up printing for your day planner

The first time you print you are prompted to choose the page format in which you want to print.



If you have purchased special blank paper for use with your day planner, you can print pages that are properly sized and formatted for that day planner paper.

If you've never used day planner paper in your printer before, it's a good idea to print on plain paper first to make sure all settings are correct. For more information, check the instructions that came with the day planner paper, or your printer user guide.

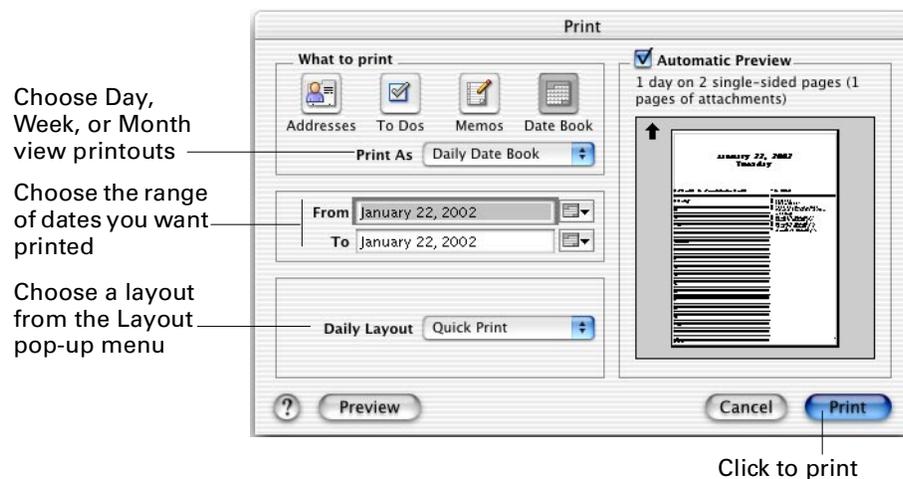
If you decide not to choose a day planner now, you can make a selection later. You can also change your selection if you like. See [“Changing or adding day planner information”](#) in this chapter.

Printing Date Book views

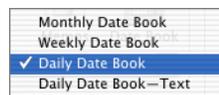
You can print the Day, Week, or Month view in Date Book for your day planner, or for a printing layout you create.

NOTE When you print Date Book views, any attachments connected to the items also print. Attachments only print with Date Book views.

Choose Print from the File menu, or click the Print button on the toolbar. Then click the Date Book button in the Print dialog box.

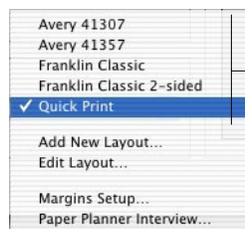


From the Print As pop-up menu choose the Date Book view you want to print. The Daily Date Book–Text option prints a simple list of your events, without any calendar graphics.



Change the From and To boxes so they show the range of dates that you want printed. If you want to print one day's worth of information, type that date into both boxes. You can also use the calendar pop-up  instead of typing a date.

Choose a printing layout from the Layout pop-up menu. (The name varies, depending on which Date Book view you're printing.)

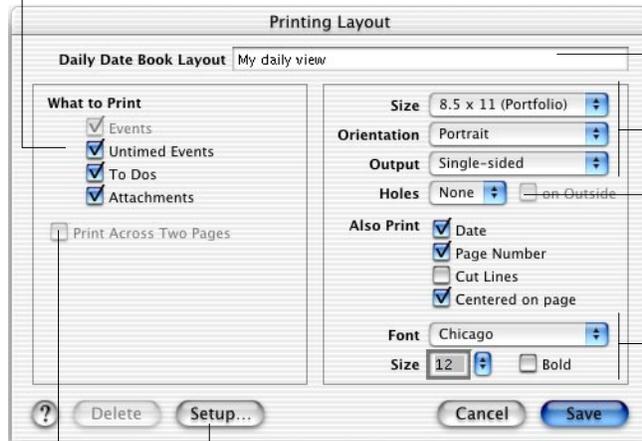


Choose a print layout
Choose Quick Print for a letter-sized calendar

Changing printing layouts for Date Book views

If the available printing layouts aren't what you need, you can create a new layout. Make sure the Print As pop-up menu shows the type of Date Book view layout you want to create: Day, Week, or Month. Then choose Add New Layout from the Layout pop-up menu. The Printing Layout dialog box appears.

Choose which items to print



Type a name for the new layout

Select paper size, orientation, and type of output

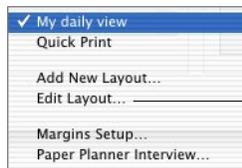
Select punch holes

Select font, font size, and font style

Click for more printing options

If printing double-sided monthly Date Book, click to spread each month across two pages

After you create and name a layout, it appears in the Layout pop-up menu.



New layout

Click to edit this layout

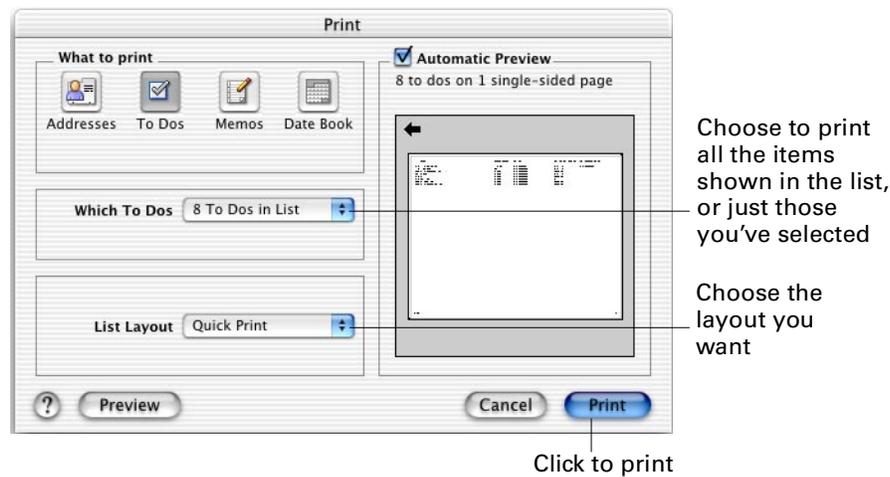
To change or delete a layout, choose it from the Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing To Do List items

You can print To Do List items together with Date Book information. However, you can also print them separately for a convenient "to-do" list.

You can choose which To Do List items you want to print—the entire set, or a smaller group. For more information, see ["Selecting records"](#) in this chapter.

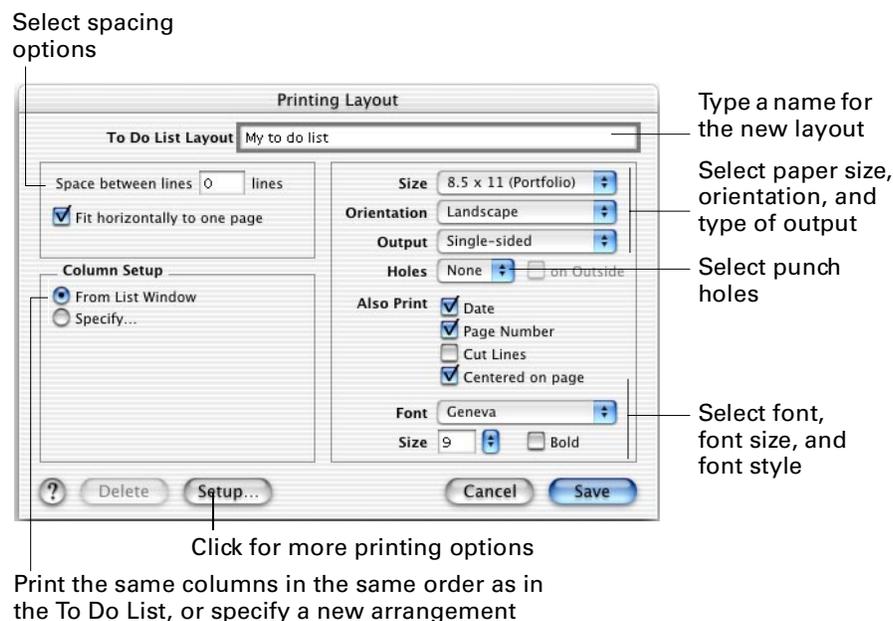
Choose Print from the File menu, or click the Print button on the toolbar. Then click the To Dos button in the Print dialog box.



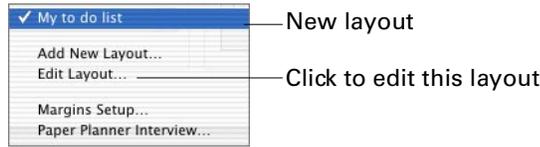
From the Which To Dos pop-up menu, choose which items you want to print. Choose a layout from the List Layout pop-up menu. For letter-sized pages, choose Quick Print.

Changing printing layouts for To Do List items

If the available printing layouts aren't what you need, you can create a new layout. From the List Layout pop-up menu, choose Add New Layout. The Printing Layout dialog box appears.



After you create and name a layout, it appears in the List Layout pop-up menu.



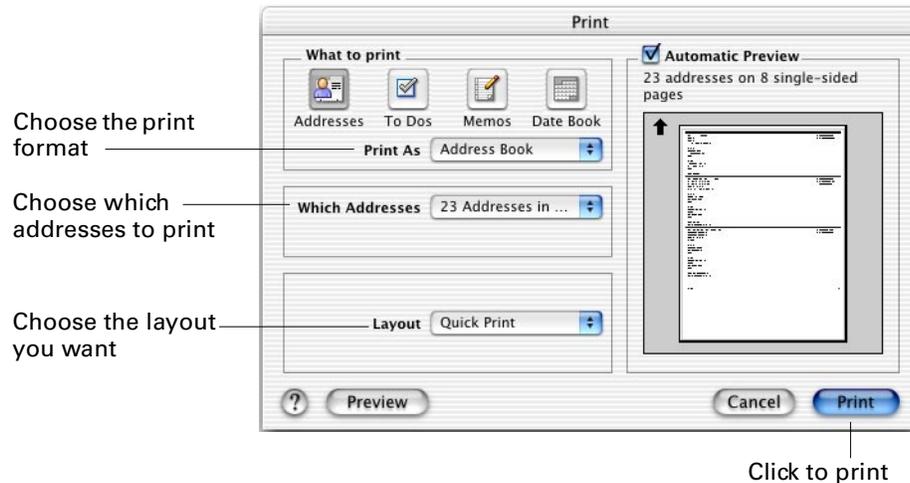
To change or delete a layout, choose it from the List Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing lists of Address Book items

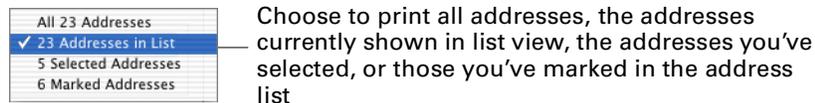
You can print Address Book items in a simple list for quick reference, or you can print address cards, one per page.

You can choose which addresses you want to print—the entire set, or a smaller group. For more information, see “[Selecting records](#)” in this chapter.

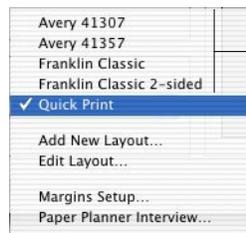
Choose Print from the File menu, or click the Print button on the toolbar. Then click the Addresses button in the Print dialog box.



From the Print As pop-up menu, choose either Address List or Address Cards. Choose the addresses you want to print from the Which Addresses pop-up menu.



After you have decided which addresses you want to print, choose a layout from the List Layout pop-up menu.



Choose a print layout

Choose Quick Print for letter-sized pages

Printing an address card

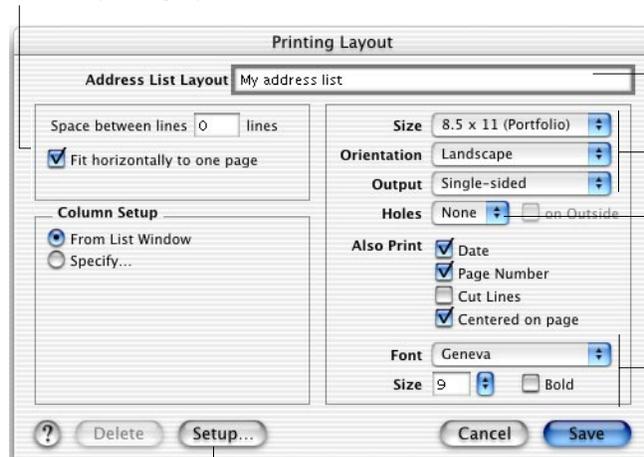
If you want to print a single address card, first view the card by double-clicking it from the address list. Then choose Print from the File menu, or click the Print button on the toolbar. When you print while viewing a card, the Print As pop-up menu is set to print address cards.

While viewing an address card, you can choose to print the information in other ways, such as on an envelope, fax cover sheet, or label.

Changing printing layouts for lists of addresses

If the available printing layouts aren't what you need, you can create a new layout. From the List Layout pop-up menu, choose Add New Layout. The Printing Layout dialog box appears.

Select spacing options



Type a name for the new layout

Select paper size, orientation, and type of output

Select punch holes

Select font, font size, and font style

Click for more printing options

After you create and name a layout, it appears in the List Layout pop-up menu.



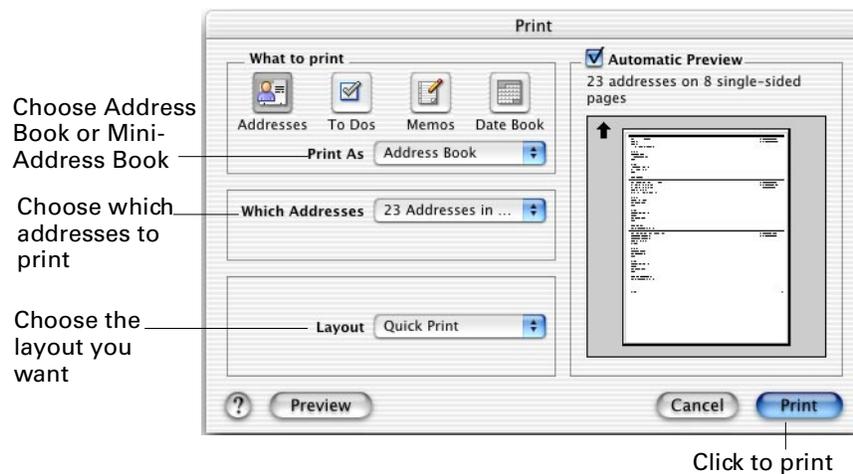
To change or delete a layout, choose it from the List Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing address books

You can print a regular address book with pages formatted to fit in a day planner binder. You can also create a mini-address book, which prints with cut and fold lines on letter-sized paper. An ultra mini-address book is similar, except it is even smaller. By editing address book layouts, you can choose which information appears in your address book: names, addresses, telephone numbers, and so on.

You can choose which addresses you want to print—the entire set, or a smaller group. For more information, see [“Selecting records”](#) in this chapter.

Choose Print from the File menu, or click the Print button on the toolbar. Then click the Addresses button in the Print dialog box.



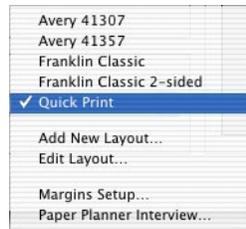
From the Print As pop-up menu, choose either Address Book or Mini-Address Book.

Choose the addresses you want to print from the Which Addresses pop-up menu.



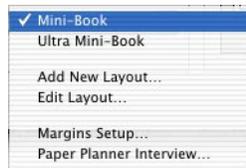
Choose to print all addresses, the addresses currently shown in list view, the addresses you've selected, or those you've marked in the address list

After you have decided which addresses you want to print, choose a layout from the Layout pop-up menu.



Choose a print layout
Choose Quick Print for letter-sized pages

If you have chosen to print a Mini-Address book, you see different options in the Layout pop-up menu.



Choose Mini-Book to print a book approximately 2.75" x 4.25"
Choose Ultra Mini-Book to print a book approximately 2" x 2.25"

Finishing mini-address books

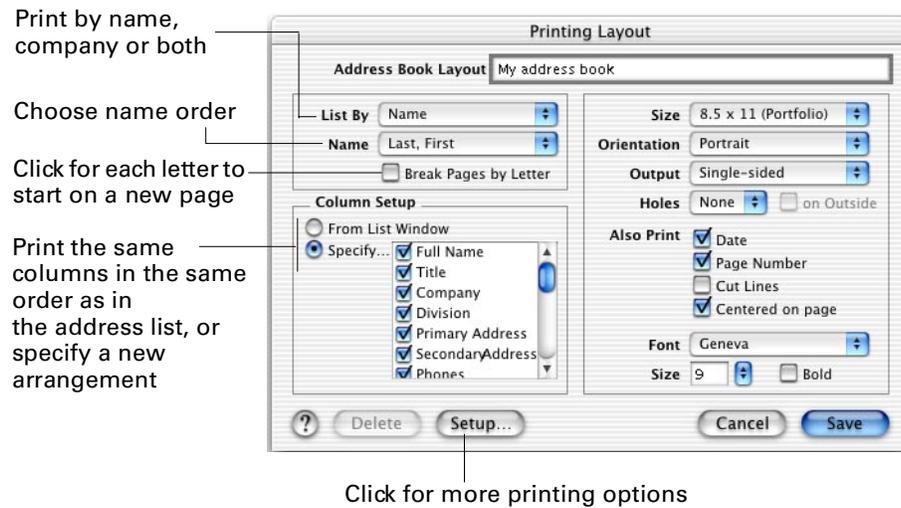
Mini-address books are set up to print on standard letter-sized paper. They are also set to print double-sided, so your addresses print on both sides of the paper. This is accomplished by printing on one side of the paper first, then re-feeding the paper so the printer can print on the other side.

See [Appendix A](#) for information on printing double-sided pages with your printer.

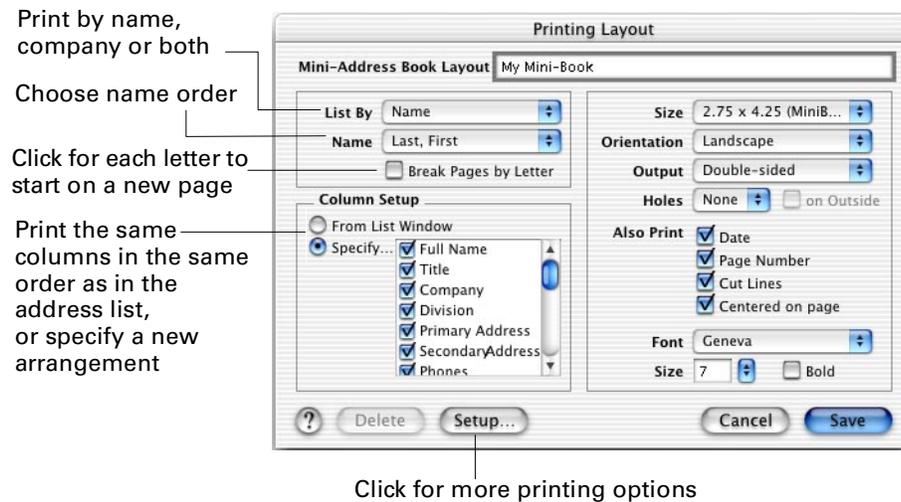
When your Mini-Address book is printed, cut the sheets on the dotted lines, and fold them on the solid lines. Assemble the pages to form a small booklet, then staple the center of the booklet if you like.

Changing printing layouts for address books

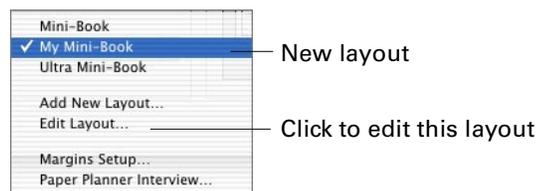
If the available address book layouts aren't what you need, you can create a new layout. From the Layout pop-up menu, choose Add New Layout. The Printing Layout dialog box appears.



If you are working with a Mini-Address book, the Printing Layout dialog box appears with different settings for size and output:



After you create a layout, it appears in the Layout pop-up menu.



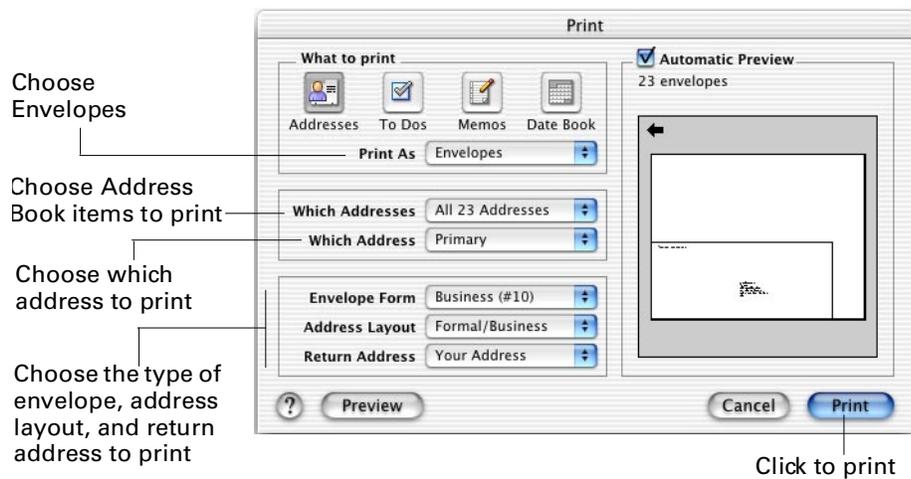
To change or delete a layout, choose it from the Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing envelopes

You can print envelopes directly. You can even add a graphic to your return address.

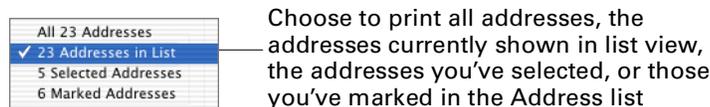
You can choose which addresses you want to print envelopes for—one address, the entire list, or a smaller group. For more information, see “[Selecting records](#)” in this chapter.

Choose Print from the File menu, or click the Print button on the toolbar. Then click the Addresses button in the Print dialog box.

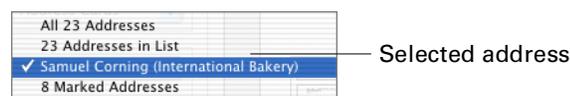


From the Print As pop-up menu, choose Envelopes.

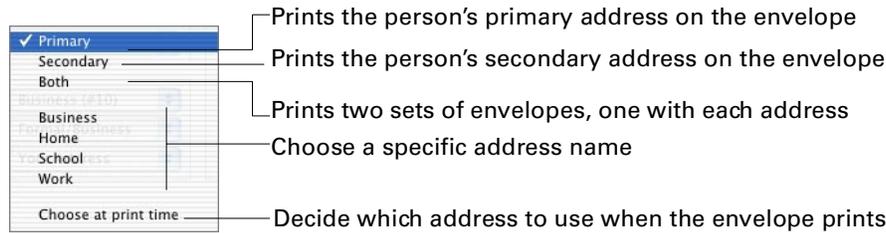
Choose the addresses you want to print envelopes for from the Which Addresses pop-up menu.



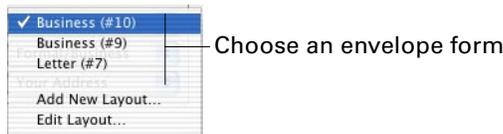
To print an envelope for one address, display the address card or select the address in the address list. Choose the selected address in the Which Addresses pop-up menu.



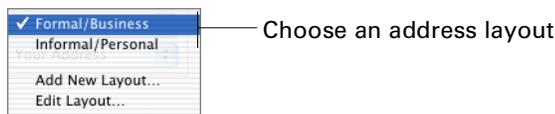
If the person has more than one address, decide which one you want to use for your envelopes. “Primary” is the default name for the address on the left side of the address card, and “Secondary” is the default name for the address on the right. If you have chosen other address names in Address Book preferences, choose that name from the Which Address pop-up.



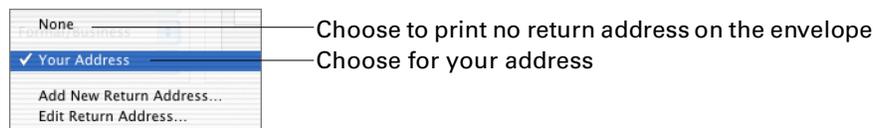
After you have decided which Address Book items and addresses you want to print, choose an envelope from the Envelope Form pop-up menu.



Choose how you want the addresses to appear by choosing from the Address Layout pop-up menu. By default, Formal/Business uses the person's full name and includes a company name in the address. Informal/Personal uses only the person's first and last name, and excludes a company name in the address. You can change address layouts—see “[Changing printing layouts for envelopes](#)” in this chapter.



Choose how you want your return address to appear by choosing from the Return Address pop-up menu.



If you have not used a return address before, choose Your Address from the Return Address pop-up. Then choose Edit Return Address. To add a new return address, choose Add New Return Address from the Return Address pop-up menu. See “[Return address layouts](#)” in this chapter for information on creating and changing return addresses.

If you are unsure how to print envelopes, consult the user guide that came with your printer for information on envelope feeding and direction of printing.

Changing printing layouts for envelopes

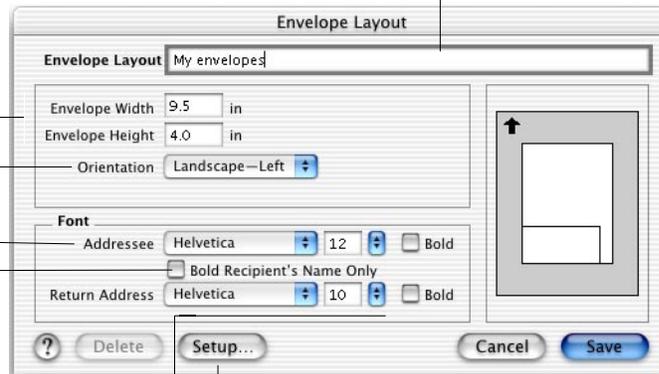
If the Envelope Form or Address Layout arrangements aren't what you need, you can create a new layout. From the Envelope Form pop-up menu, choose Add New Layout. The Envelope Layout dialog box appears.

Enter the width and height of the envelope Type a name for the new layout

Choose the envelope orientation

Choose font and size for addressee

Select to boldface recipient's name only



Click for more printing options

Choose font and size for return address

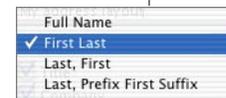
Address layouts

You can also create an address layout by choosing Add New Layout from the Address Layout pop-up menu. The Address Layout dialog box appears.



Type a name for the new address layout

Choose a name format



Choose additional information to be printed on the envelope

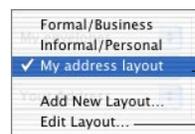
After you create a layout of either type, it appears in its respective pop-up menu.



Envelope Form

New envelope layout

Click to edit this layout



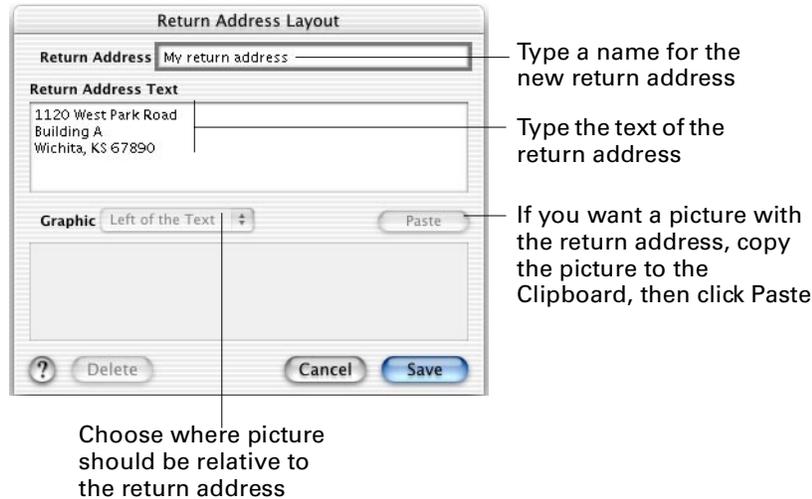
Address Form

New address layout

Click to edit this layout

Return address layouts

You can create a new return address format. Choose Add New Return Address from the Return Address pop-up menu.



The new return address appears in the Return Address pop-up menu.



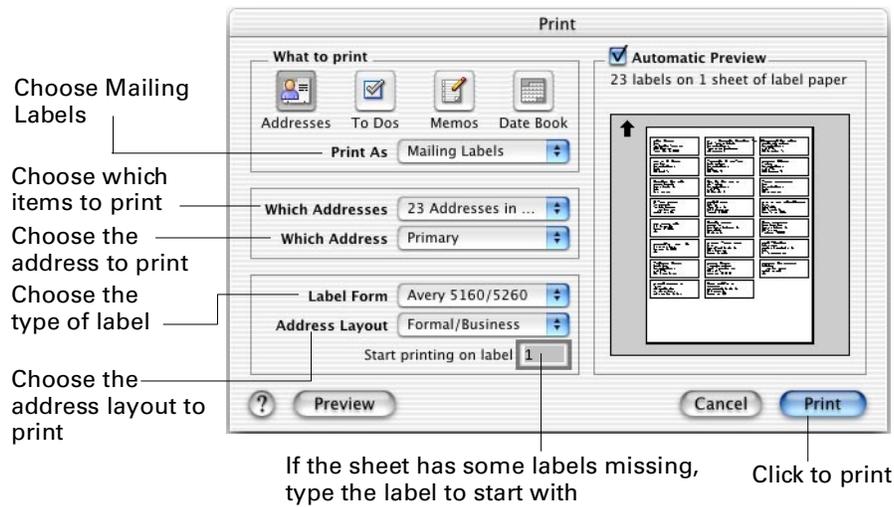
To change or delete a layout or a return address, choose the layout or return address from its pop-up menu, then choose Edit Layout or Edit Return Address from the pop-up menu. Make the changes you want, then click Save. Click the Delete button if you want to delete a layout or return address.

Printing mailing labels

You can print mailing labels for one address or a group of addresses. To print a label for one address, see [“Printing an address card”](#) in this chapter.

You can choose which addresses you want to print mailing labels for—the entire set, or a smaller group. For more information, see [“Selecting records”](#) in this chapter.

Choose Print from the File menu, or click the Print button on the toolbar. Then click the Addresses button in the Print dialog box.



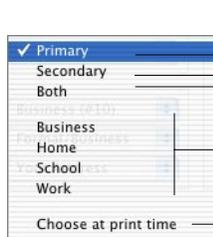
From the Print As pop-up menu, choose Mailing labels.

Choose the addresses you want to print mailing labels for from the Which Addresses pop-up menu.



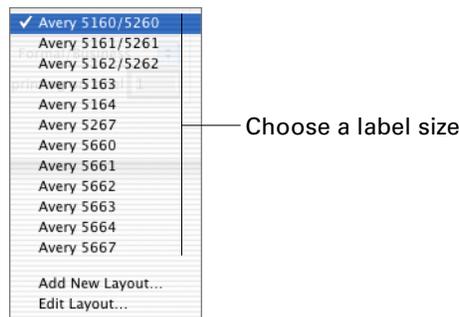
Choose to print all addresses, the addresses currently shown in list view, the addresses you've selected, or those you've marked in the address list

Decide what address you want to use for your mailing labels. "Primary" is the default name for the address on the left side of the address card, and "Secondary" is the default name for the address on the right. If you have chosen other address names in Address preferences, choose that name from the Which Address pop-up menu.

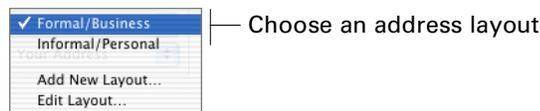


Prints the person's primary address on the label
 Prints the person's secondary address on the label
 Prints two sets of labels, one with each address
 Choose a specific address
 Decide which address to use when the label prints

After you have decided which Address Book items and addresses you want to print, choose a label size from the Label Form pop-up menu.



Choose how you want the addresses to appear by choosing from the Address Layout pop-up menu. By default, Formal/Business uses the person's full name and includes a company name in the address. Informal/Personal uses only the person's first and last name, and excludes a company name in the address. You can change address layouts—see [“Changing printing layouts for mailing labels”](#) in this chapter.



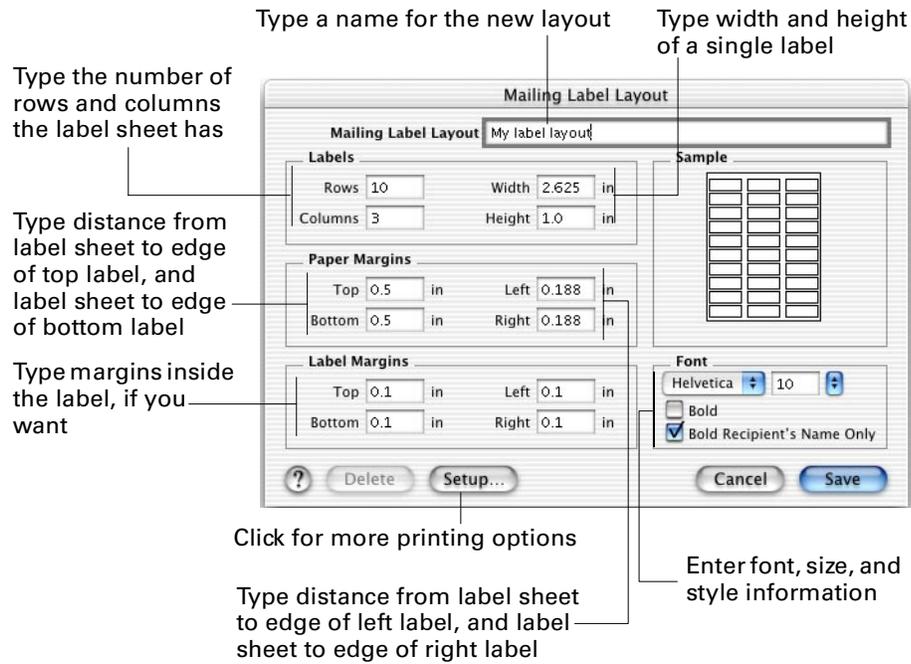
If you are working with a label sheet that has some labels missing, you can type a number into the Start printing on label box to indicate on which label on the sheet printing should begin. To determine the correct number, count the labels across first, then down.

If you are unsure how to print labels, consult the user guide that came with your printer.

To prevent wasting labels, you can check size, spacing, and formatting by printing on a plain piece of paper first before feeding any label sheets through the printer.

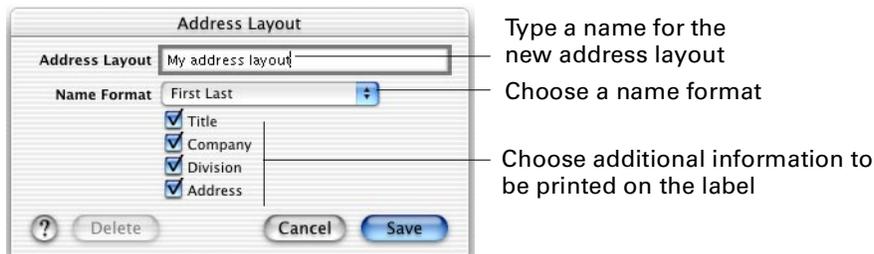
Changing printing layouts for mailing labels

If the Label Form or Address Layout arrangements aren't what you need, you can create a new layout. From the Label Form pop-up menu, choose Add New Layout. The Mailing Label Layout dialog box appears.

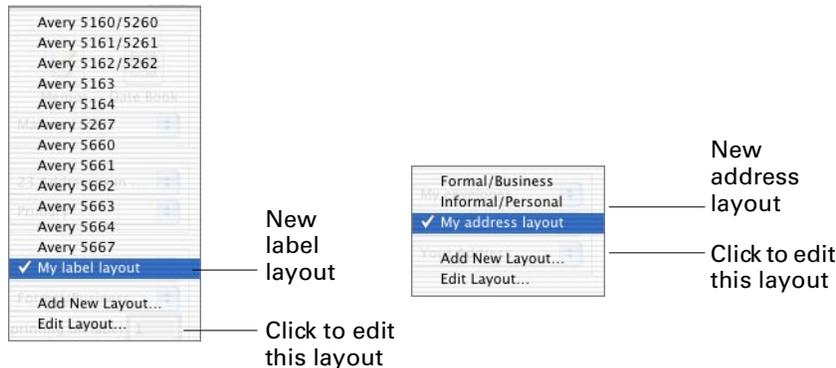


Address layouts

You can also create an address layout by choosing Add New Layout from the Address Layout pop-up menu. The Address Layout dialog box appears.



After you create a new layout of either type, it appears in its respective pop-up menu.



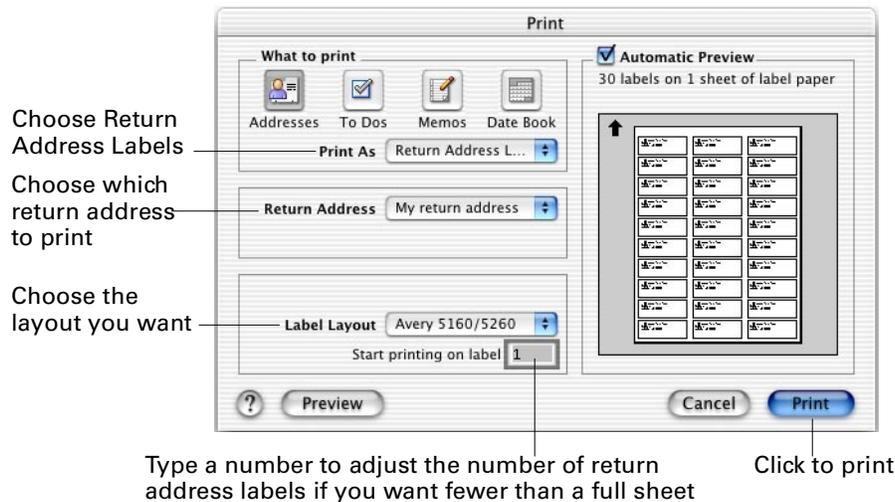
To change or delete a label or address layout, choose the layout from its pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing return address labels

You can print return address labels. You can even add a graphic to the return address.

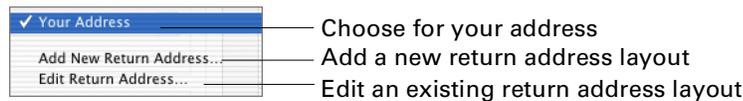
One sheet of return address labels is printed. If you want more than one sheet, type the number of copies you want in your printer's Print dialog box just before you print. For fewer labels, change the number in the "Start printing on label" field until the Preview shows the number of labels you want.

Choose Print from the File menu, or click the Print button on the toolbar. Then click the Addresses button in the Print dialog box.



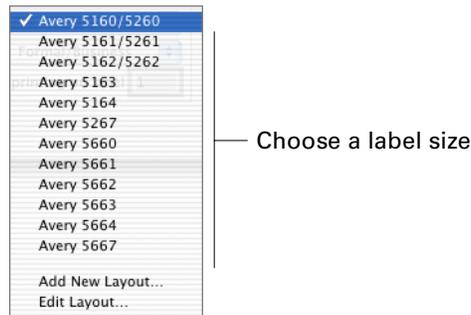
From the Print As pop-up menu, choose Return Address Labels.

Choose which return address you want to use for your labels from the Return Address pop-up menu.



If you have not used a return address before, choose Your Address from the Return Address pop-up. Then choose Edit Return Address. To add a new return address, choose Add New Return Address from the Return Address pop-up menu. See ["Return address layouts"](#) in this chapter for information on creating and changing return addresses.

Choose a label from the Label Layout pop-up menu.



If you are working with a label sheet that has some labels missing, you can type a number into the “Start printing on label” box to indicate on which label on the sheet printing should begin. To determine the correct number, count the labels across first, then down.

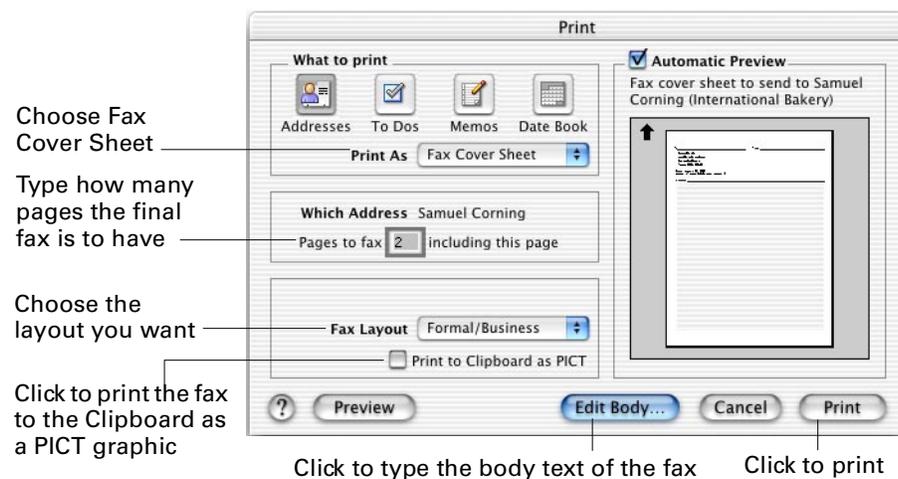
If you are unsure how to print labels, consult the user guide that came with your printer.

To prevent wasting labels, you can check size, spacing, and formatting by printing on a plain piece of paper first, before feeding any label sheets through the printer.

Printing fax cover sheets

To view the address card you want to print a fax cover sheet for, double-click it in the Address list. You can also show what addresses you want a fax cover sheet for by clicking the address once in the address list to select it.

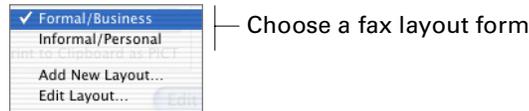
Choose Print from the File menu, or click the Print button on the toolbar. Then click the Addresses button in the Print dialog box.



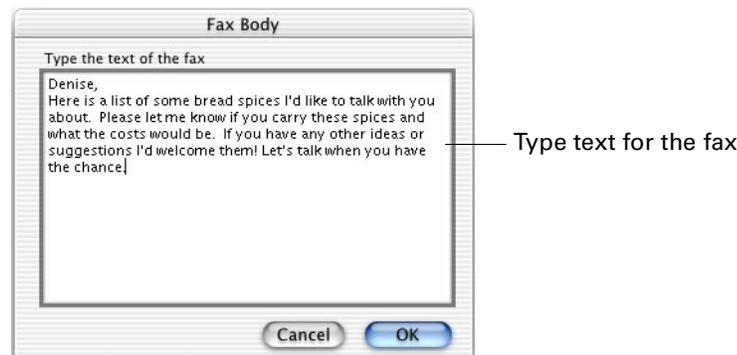
From the Print As pop-up menu, choose Fax Cover Sheet.

Type the total number of pages the fax is to have, so this information is printed on the cover sheet.

Choose how you want the fax address to appear by choosing from the Fax Layout pop-up menu. By default, Formal/Business uses the person's full name and company name on the fax cover sheet. Informal/Personal uses only the person's first and last name. You can change fax layouts—see [“Changing printing layouts for fax cover sheets”](#) in this chapter.



Click the Edit Body button, then type the body text of the fax. Click OK or press Enter when you're done.

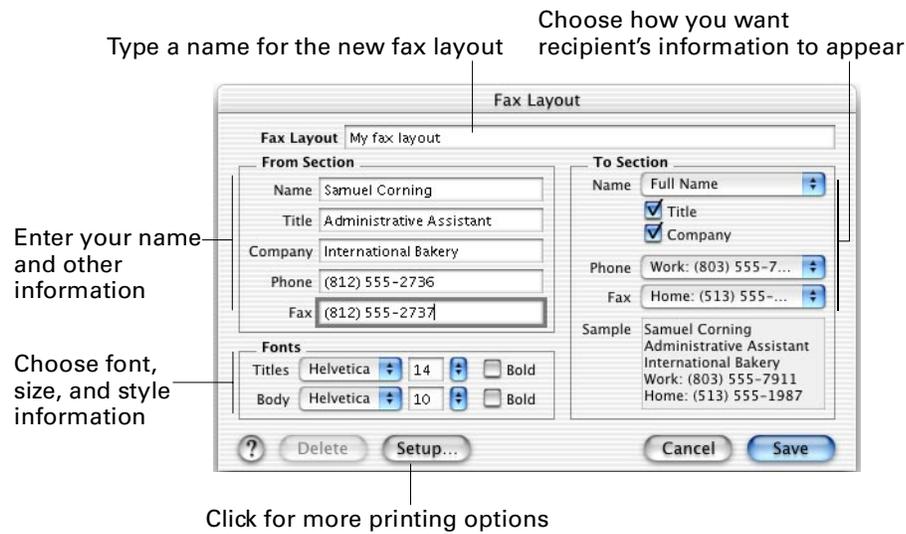


If you want the fax to be sent to the Clipboard as a PICT graphic file, instead of to your printer, select Print to Clipboard as PICT. You can then paste the fax image from the Clipboard into another software application.

For example, if you have a document created in another software application that you want to fax from your computer, you can create the fax cover sheet, copy the fax cover sheet to the Clipboard, then paste it into the other document.

Changing printing layouts for fax cover sheets

If the fax layout arrangement isn't what you need, you can create a new one. From the Fax Layout pop-up menu, choose Add New Layout. The Fax Layout dialog box appears.



After you create a layout, it appears in the Fax Layout pop-up menu.

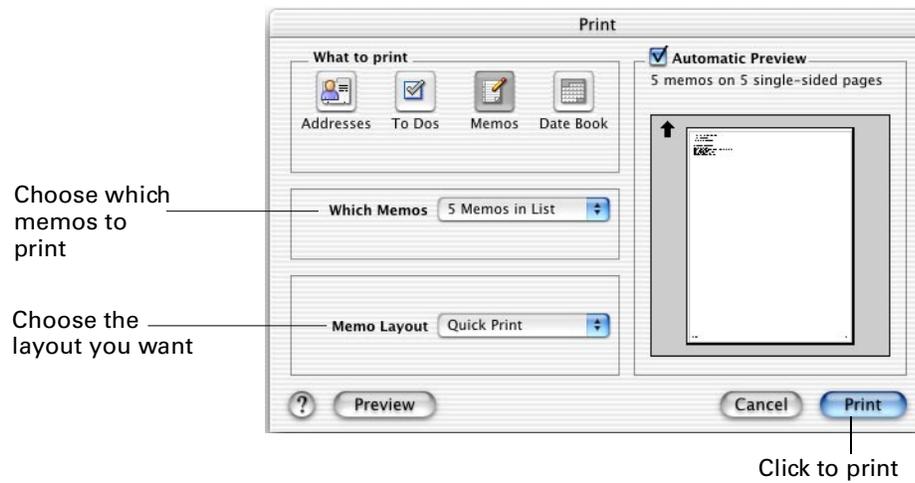


To change or delete a layout, choose it from the Fax Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing memos

You can choose which memos you want to print—the entire set, or a smaller group. For more information, see [“Selecting records”](#) in this chapter. You can also print a single memo while you are viewing or editing it.

Choose Print from the File menu, or click the Print button on the toolbar. Then click the Memos button in the Print dialog box.

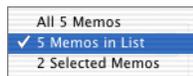


Choose which memos to print

Choose the layout you want

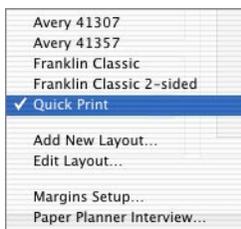
Click to print

Choose which memos you want to print from the Which Memos pop-up menu.



Choose to print either all memos, only those shown in the memo list view, or just those you've selected

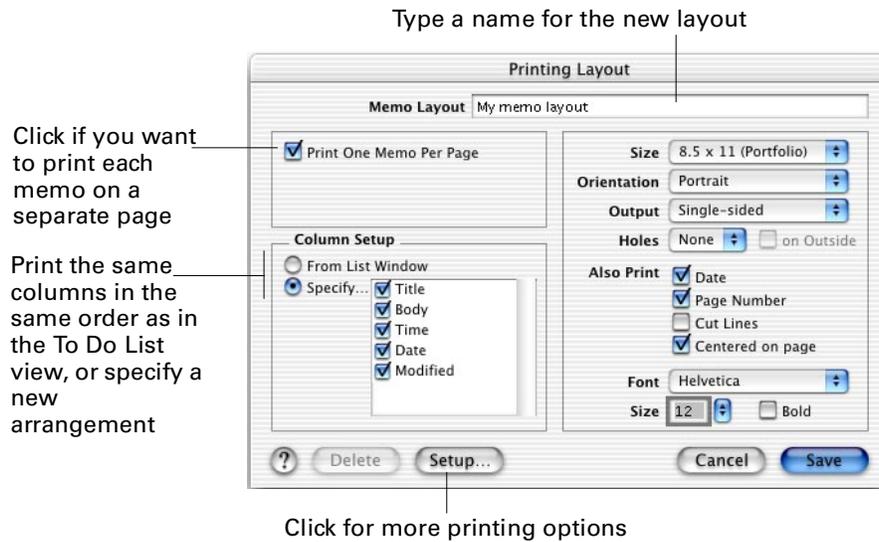
Choose a layout from the Memo Layout menu.



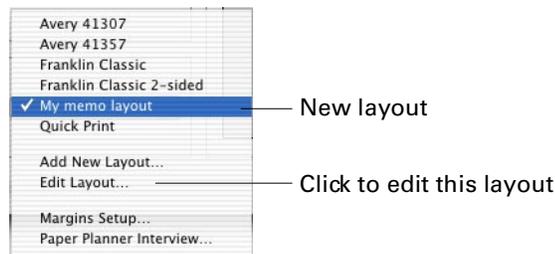
Choose a print layout
Choose Quick Print for letter-sized pages

Changing printing layouts for memos

If the available printing layouts aren't what you need, you can create a new layout. From the Memo Layout pop-up menu, choose Add New Layout. The Printing Layout dialog box appears.



After you create a layout, it appears in the Memo Layout pop-up menu.

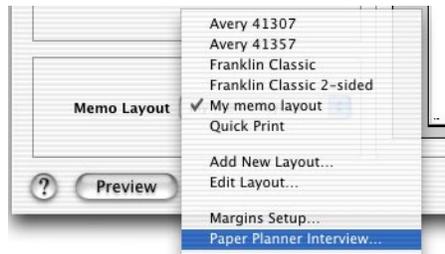


To change or delete a layout, choose the layout from the Memo Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Changing or adding day planner information

The first time you print, you are prompted for information about your day planner. If you want to change that information, or if you did not initially specify a day planner, you can update this information.

In the Print dialog box, choose Paper Planner Interview from the Layout menu in the bottom left corner. The Paper Planner Interview menu choice is available when printing Date Book views, address lists, address books, mini-address books, memos, or To Do Lists.



The Paper Planner Interview dialog box appears. Choose a day planner and a binder size.



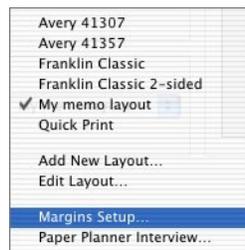
If you have previously selected a paper planner, you are prompted to indicate if you want this new information to replace the old, or be added to it. Click Replace if you are changing day planners, or Add if you want to have a choice of day planner formats.

If you want information formatted to print on standard letter-sized sheets, rather than day planner sheets, choose Quick Print from the Layout menu.

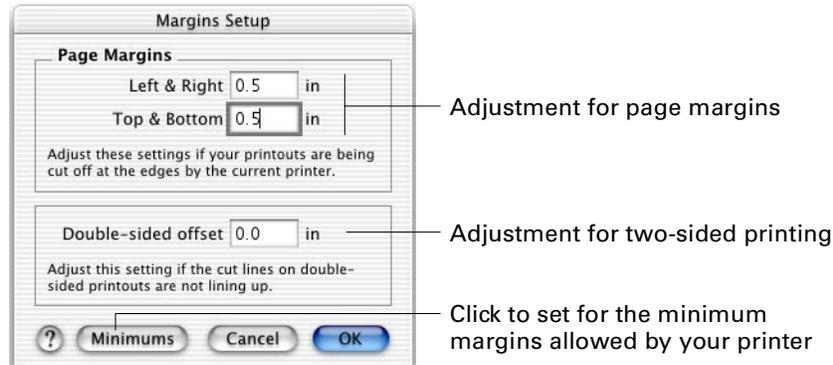
Setting custom margins

You can fine-tune the print settings if you need to.

In the Print dialog box, choose Margins Setup from the Layout menu in the bottom left of the Print dialog box. The Margins Setup menu option is available when printing Date Book views, address lists, address books, mini-address books, memos, or To Do Lists.



The Margins Setup dialog box appears. If your printouts are being “cut off” by your printer, you may need to decrease the page margin settings slightly. The default settings, as well as the “Minimums” settings, are determined by your printing software.



If you are printing double-sided pages, such as you would for a mini-address book, and the cut lines do not line up from one side of the page to another, measure the difference between the cut lines on the two sides, then type one-half that distance in the Double-sided offset box.

HotSync® Operations

When you use both a computer and a handheld to access information, you want the information to be the same—and the most up-to-date—wherever you access it. The HotSync® operation is designed to quickly and conveniently synchronize information between your computer and your handheld.

See online Help for detailed information about HotSync operations. Help is available from the main menu and from the Help button in dialog boxes.

About HotSync operations

A HotSync operation is a two-way exchange and update data between your handheld and your computer. This two-way exchange “synchronizes” your data, which means that after a HotSync operation, your data is the same on your handheld and on your computer. Changes that you make on one side are made on the other. HotSync Manager transfers new and changed portions of data, thereby reducing time needed to complete the HotSync operation.

With HotSync technology, you can do the following:

- Synchronize the data from applications on your handheld with the corresponding modules on your computer, and vice versa.
- Install applications and add files from your computer to your handheld, or if your handheld has an expansion card slot, to an expansion card inserted in your handheld.
- Manage one or more handhelds with a single computer.
- Keep your data safe by automatically creating backup copies of all your data each time you synchronize.

NOTE You can also use the Merge feature to merge the data of two data files so that each data file contains all the data from the other. A dialog box shows the progress of the merge. If conflicts occur, Palm™ Desktop software prompts you for assistance. See online Help for detailed information about the Merge feature.

During a HotSync operation, your computer receives a “synchronize” command from your handheld. An application in the background, called the Transport Monitor, is always working (after you enable it) to detect a HotSync connection from your handheld. When the Transport Monitor recognizes the connection, it calls the Conduit Manager to oversee the HotSync operation.

If an application synchronizes data between your computer and your handheld, the application uses a conduit to transfer the data. The Conduit Manager, another background application on your computer, manages each conduit.

You work only with HotSync Manager. The background applications are called automatically when they are needed.

You can connect your handheld with your computer to perform a HotSync operation in various ways:

- Cradle/cable HotSync operation

The most commonly used method, also called a local HotSync operation. The cradle/cable connects to a USB or serial port on your computer. For the first HotSync operation, you must perform a local HotSync operation.

- IR HotSync operation

If your handheld uses Palm OS® software 3.3, 3.5, or later, its infrared (IR) port supports the IrCOMM implementation of the IrDA standards for infrared communication. This means that you can use the IR port to perform HotSync operations, and you don't need your HotSync cradle/cable. This is especially useful if you travel with an infrared-enabled laptop.

NOTE At the time of this writing, the current release of Mac OS X does not enable you to perform IR HotSync operations. Check the documentation for your release of Mac OS X to find out if this situation has changed.

- Modem HotSync operation

Uses two modems: one connected to your handheld, the other to your computer. Use a modem HotSync operation to synchronize data when you want to dial directly into your computer from a remote location.

Accessing HotSync Manager

HotSync Manager works closely with Palm Desktop software, but it is a separate application. You can access HotSync Manager in the following ways:

- In Palm Desktop software, from the HotSync menu, choose the command you want.
- In the Palm folder, double-click the HotSync Manager icon. This opens the HotSync Software Setup dialog box.
- From the menu in Instant Palm Desktop application, choose HotSync.

Preparing for the first HotSync operation

Before you can perform your first HotSync operation, you must connect the HotSync cradle/cable to your computer. How you make this connection depends on the following:

- The kind of HotSync cradle/cable you have.
Your cradle/cable has either a USB connector or (if the cradle/cable is an older model) a connector that requires an adapter to make it work with either a USB port or a serial port. If you're not sure what kind of cradle/cable you have, consult the documentation that came with your handheld.
- The kind of port on your computer that you want to connect to: a USB port or a serial port.

There are three kinds of connections you can make:

- A USB cradle/cable to your computer's USB port
- B Serial cradle/cable to your computer's USB port
- C Serial cradle/cable to your computer's serial port

If you need to make connection B or C and lack the necessary hardware, visit the store at the Palm web site to learn about peripherals that enable you to make the connection. From the Help menu in Palm Desktop software, choose Visit Palm on the Web.

NOTE Your first HotSync operation must be a local operation using the cradle/cable connection.

Connecting a USB cradle/cable to a USB port

Plug the USB connector of your cradle/cable into a USB port on your computer. Next, open the Palm folder on your computer and start HotSync Manager. Click the Connection Settings tab of the HotSync Software Setup dialog box and select the On check box next to USB. Click the HotSync Controls tab and enable the Transport Monitor, if it is not already enabled. Close the HotSync Software Setup dialog box.

Connecting a serial cradle/cable to a USB port

Connect the USB adapter to the end of the HotSync cradle/cable. Next, connect the adapter cable to a USB port on your computer. Open the Palm folder on your computer and start HotSync Manager. Click the Connection Settings tab of the HotSync Controls tab and select the On check box next to PalmConnect® USB. If you are using a USB adapter from a third-party vendor, look for the name of the

adapter and select its On check box. Click the HotSync Controls tab and enable the Transport Monitor, if it is not already enabled. Close the HotSync Software Setup dialog box.

Connecting a serial cradle/cable to a serial port

Connect the Mac serial adapter to the end of the HotSync cradle/cable. Next, connect the adapter cable to either the printer or modem port on the back of your computer (remember which port you connected to). Open the Palm folder on your computer and start HotSync Manager. Click the Connection Settings tab of the HotSync Software Setup dialog box. Select the On check box next to Printer Port or Modem Port, depending on which port you connected to. Click Settings, select Serial in the Settings dialog box, select the speed, select the modem if you are using one, and click OK. Click the HotSync Controls tab and enable the Transport Monitor, if it is not already enabled. Close the HotSync Software Setup dialog box.

Sharing a port with the cradle/cable and another device

In order to perform HotSync operations, you must have the Transport Monitor enabled on your computer. By default, the Transport Monitor is enabled whenever you start your computer. Keep this default behavior if your HotSync cradle/cable is always connected to a port that you use exclusively for HotSync operations.

If, however, you use the same port for other devices (such as an AppleTalk network connection or a printer cable) besides the cradle/cable, disable the Transport Monitor, and then enable it manually whenever you connect the cradle/cable to perform a HotSync operation.

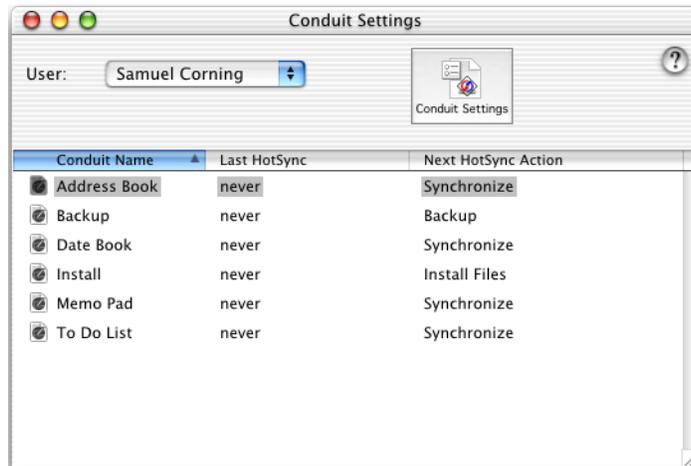
To disable Transport Monitor, from the HotSync menu, select Setup. In the HotSync Controls tab, select Disabled. Under HotSync Options, deselect the check box for the option Enable HotSync software at system startup. Close the HotSync Software Setup dialog box.

To manually enable the Transport Monitor, open the Palm Folder on your computer and start HotSync Manager. In the HotSync Controls tab, select Enabled. Close the HotSync Software Setup dialog box.

Changing conduit actions

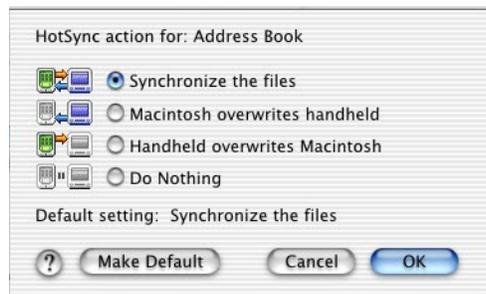
The HotSync Manager uses conduits to transfer data between the applications or databases on your handheld and its counterpart in Palm Desktop software on your computer. In general, you don't need to change the default conduit settings. The main reason to change the default settings from a two-way to a one-way transfer would be to overwrite all of an application's data on your handheld or computer.

You specify synchronization rules by selecting Conduit Settings from the HotSync menu. Select the conduit (Address Book, Date Book, Memo Pad, or To Do List) and then click the Conduit Settings button.



The Conduit Settings dialog box gives you choices for synchronizing each conduit. Select the application, then select one of the following HotSync actions:

- Synchronize the files on the handheld and desktop (two way)
- Desktop overwrite the handheld (one way)
- Handheld overwrite the desktop (one way)
- Do nothing



Performing a local cradle/cable HotSync operation

Keep the following points in mind when performing a local HotSync operation:

- The first time you perform a HotSync operation with a new handheld or after a hard reset, you need to assign a username to the handheld. HotSync Manager prompts you to enter a name or select an existing name. Select an existing name only if it corresponds to the handheld. Do not use the same username for more than one handheld.
- To stop a HotSync operation that is in progress, click the Cancel button in the HotSync Progress dialog box on your computer or handheld. If the HotSync Progress dialog box is not displayed, Tap Cancel on your handheld. Cancellation is not immediate; give the HotSync operation time to stop.
- After completing the first HotSync operation with the local cradle/cable connection, you can set up and perform HotSync operations using other connection methods (for example, IR or modem).

To perform a local HotSync operation, connect your handheld to the cradle/cable. Enable the Transport Monitor, if it is not already enabled, and select the connection method if it is not already selected. Press the HotSync button on the cradle/cable. If your cable does not have a HotSync button, turn on your handheld, open the HotSync application, and tap the HotSync icon. If this is the first HotSync operation and you assigned a password to your handheld, HotSync Manager prompts you to enter the password on your computer. Enter the password and click OK. Wait for a message on your handheld indicating that the operation is complete, and then remove your handheld from the cradle/cable.

About the data file

Palm Desktop software stores your events, addresses, memos, and To Do List items in one data file on your computer. You must maintain a separate data file for each person who uses Palm Desktop software on the same computer. As described in [Chapter 1](#), you can open only one data file at a time in Palm Desktop software.

Your data file, called User Data, is created the first time you install Palm Desktop software. The User Data file is located in a folder that has the same name as the username of your handheld, which in turn is located in the Users folder.

For example, if you entered “Jane Garcia” as your username, your data file (User Data) is in the folder called Jane Garcia. The folder called Jane Garcia is in the Users folder.

The location of the Users folder depends on the operating system used by the computer and the number of people who are defined as Mac users.

Mac OS	User	Location of data file
Mac OS X	Any kind of Mac user.	<Hard Disk>/Users/[Mac username]/ Documents/Palm/Users/[your username]
Mac OS 9	You are the only user (you are defined as the computer Owner).	<Hard Disk>/Documents/Palm/Users/[your username]
Mac OS 9	You are one of multiple users and you are not the computer Owner.	<Hard Disk>/Users/[Mac username]/ Documents/Palm/Users/[your username]

Depending on the status of the handheld, during the first HotSync operation of a handheld and a computer, HotSync Manager behaves as follows:

- If you have already synchronized the handheld with another computer, the handheld has a username. HotSync Manager automatically creates a new data file in Palm Desktop software, using the same username as the one on the handheld, and then synchronizes the data.
- If the handheld has no username (that is, it has never been synchronized with any computer, it has been hard reset, or it has been synchronized only with a user profile), HotSync Manager displays the New Users dialog box so that you can create a username for a new data file, and then synchronizes the data.

The first time you perform a HotSync operation, the Palm Desktop software data file you indicate and your handheld are linked. When you synchronize data in the future, the HotSync Manager always synchronizes with the same data file. Make sure that you are using the correct file when you open Palm Desktop software. To find out if you are using the correct file, check to see if your username appears as the User displayed on the right side of the toolbar. If your username does not appear, click the User pop-up menu and choose your name from the list.

NOTE By creating a user profile, you can preconfigure Palm OS handhelds with the same set of data (addresses, events, memos, and To Do List items) and applications before each handheld is individualized with a specific username and data file. See the online Help for more information about user profiles.

Synchronizing multiple data files

You can synchronize data between your handheld and two or more different types of computers, even between a Mac computer and an IBM-compatible running Windows operating system—so long as the computers have HotSync Manager installed on them. The data files on the two computers will have the same username. For example, you can synchronize data between two computers, between one PC and one Mac computer, between a portable and a desktop, and so on.

For some users, it is useful to have Palm Desktop software and their personal information on more than one computer (for example, on an office computer and

a home computer). Having two data files creates the problem of making sure both contain the same information. The easiest way to ensure multiple data files contain the same information is to perform HotSync operations with both computers on a regular basis.

To synchronize with another computer, perform a HotSync operation with your handheld and the computer that you normally synchronize with. Then perform a HotSync operation with your handheld and your secondary computer. HotSync Manager automatically creates a user on Palm Desktop software using the unique username assigned to your handheld. The HotSync operation copies all data from the handheld to the secondary computer.

Synchronizing multiple handhelds to one computer set up for multiple Mac users

A Mac computer can be set up to host multiple users. To do this, the computer's owner creates an account for each person who is to use the computer. Each account defines a user's environment on the computer: the account regulates the user's access to the computer's locations, applications, and capabilities (for example, access to HotSync Manager and the capability to print from the computer).

Note that this situation differs from having many users using the same computer, all of whom have undefined and unlimited access to the computer. Consult the documentation of your computer for more information about multiple Mac users.

This information is important to you as a user of Palm Desktop software because on computers with multiple Mac users, a user of Palm Desktop software must be hosted by one of the Mac users and must be given access to Palm Desktop software and HotSync Manager. Then, to see your data, you must first log into the correct Mac user environment using a Mac username and password; these are given to you by the person who is defined as the Owner of the computer. You can then access Palm Desktop software and your data.

Log in as the correct user

Before you synchronize or otherwise work with your data, be sure the computer is logged in under the Mac user who hosts you. If you work on the computer under the wrong Mac username and open Palm Desktop software, you are likely to encounter the following problems:

- Your username is not in the User pop-up menu because you do not have privileges in this environment. Your data is also unavailable for the same reason: you are in the wrong environment.
- If you synchronize in this environment, HotSync Manager cannot find your original data file and thus proceeds as if this were the first HotSync operation with your handheld on this computer. It automatically creates a new data file using the username on your handheld and loads your data into this wrong environment.

Installing applications on your handheld or an expansion card

Use HotSync Manager to install applications and files from your computer to your handheld or to an expansion card inserted in your handheld. Visit the Palm web site, www.palm.com, to find links to other web sites from which you can download handheld applications to your computer.

NOTE By default, Palm™ applications (files with the extension PRC, PQA, PDB, or SCR) are installed to your handheld, but you can change their destination to an expansion card if your handheld is equipped with an expansion card slot. All other files must be installed on an expansion card.

To install applications and files to your handheld or expansion card:

1. Add the application or files to your install list.
2. From the User pop-up menu on the toolbar, choose the username of the handheld to which you want to install applications.
3. In Palm Desktop software, from the HotSync menu, select Install Handheld Files.

If the file you want to install is not listed in the dialog box, go to the folder to which you copied the file.

4. Select the application(s) or file(s) you want to install on your handheld and click Add file.
5. Close the Install Handheld Files dialog box.

To install an application to a destination other than the one shown in the Destination column, click Change Destination and make the changes. The Change Destination button is only available if your handheld is equipped with an expansion card slot and this is not the first HotSync operation.

6. Press the HotSync button on the cradle/cable to perform a HotSync operation. This installs the application(s) and file(s) to the destination you selected.

Files that remain in the list after you perform a HotSync operation did not install on the handheld. If this happens, here are some likely reasons:

- Your handheld ran out of memory.
- The file type was not recognized during the HotSync operation. Expansion cards may hold applications that use files other than the Palm application files. In order for your handheld to recognize such a file, you must launch the application that uses these files at least once.

Archiving data you delete from your handheld

When you delete an item from your handheld, you have the option to have the item archived on your computer during the next HotSync operation. The archive only contains items you delete from the handheld; items deleted from the handheld through synchronization with Palm Desktop software are not archived.

NOTE Records that are deleted or purged from the handheld are archived only if the option Save archive copy on PC is selected for that record on the handheld during the purge or deletion.

The archive file is called “User Data Archive” and is located in the Users folder in the folder with the name corresponding to the name of your handheld. For example, if you entered “Jane Garcia” as your username, the archive file is located in the folder called “Jane Garcia” in the User folder.

Resolving HotSync conflicts

After performing a HotSync operation, you may receive a message that indicates errors occurred. If you have errors, select View Log from the HotSync menu to display a description of these errors. After you correct the errors, perform another HotSync operation to ensure you corrected all errors. For more information, see troubleshooting in the HotSync Manager online Help.

Using the Instant Palm™ Desktop Application

This chapter explains the basics of using the Instant Palm™ Desktop application.

About the Instant Palm Desktop application

The Instant Palm Desktop application provides you with quick access to many of the most frequently used features of Palm™ Desktop software and HotSync® Manager.

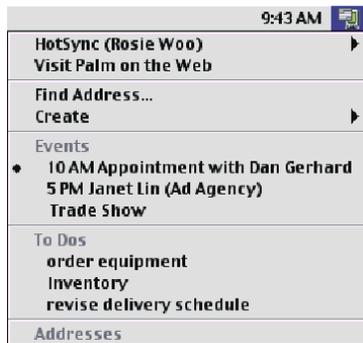
You can display or hide the Instant Palm Desktop menu by choosing Preferences from the Palm Desktop menu in Mac OS X or from the Edit menu in Mac OS 9. Click General, and then select the Show Instant Palm Desktop menu checkbox. In Mac OS 9, you must restart your computer for this change to take effect.

When the Show Instant Palm Desktop checkbox is selected in Preferences, you can display the Instant Palm Desktop menu. In Mac OS X, click and hold the Palm Desktop icon in the dock when Palm Desktop is running or hidden. In Mac OS 9, click the Instant Palm Desktop menu icon in the upper-right corner of the screen.

NOTE In Mac OS X, the Instant Palm Desktop menu is only available when Palm Desktop is currently running or hidden. In Mac OS 9, the Instant Palm Desktop menu is also available when Palm Desktop is not running.

In Mac OS X, click and hold the Palm Desktop icon in the dock





In Mac OS 9, click the Instant Palm Desktop icon in the upper-right corner of the screen

From the Instant Palm Desktop menu, you can launch both Palm Desktop and HotSync Manager software and perform the following:

- See your Date Book events and To Do List items for today
- Show designated addresses and phone numbers, and dial phone numbers
- Quickly start Palm Desktop software or switch to it from another application
- Search for addresses
- Create addresses, events, memos, and To Do List items

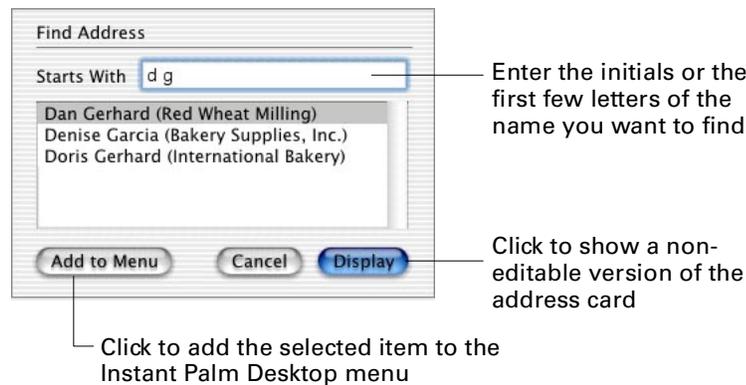


Working with addresses

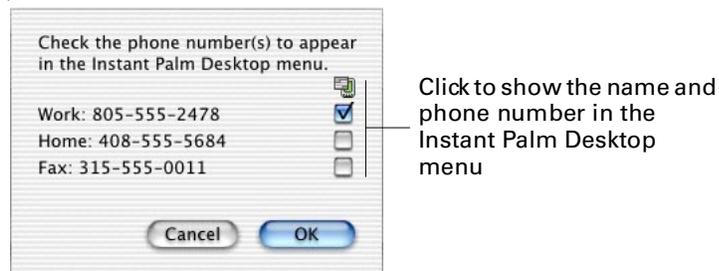
In the Instant Palm Desktop menu, you can search for and display addresses, and add their names and phone numbers to the Instant Palm Desktop menu.

NOTE For more information about setting up for dialing telephone numbers, see [“Setting dialing preferences”](#) in [Chapter 3](#).

Choose Find Address from the Instant Palm Desktop menu to search for an address. The Find Address dialog box appears.



When you click Add to Menu, you see a dialog box similar to the one below.



When you click Display in the Find Address dialog box, you see a non-editable version of the address card.



To remove an address from the Instant Palm Desktop menu, display the appropriate address card and deselect the box next to the phone number. You can do this from either the Instant Palm Desktop address card or the address card in Palm Desktop software.

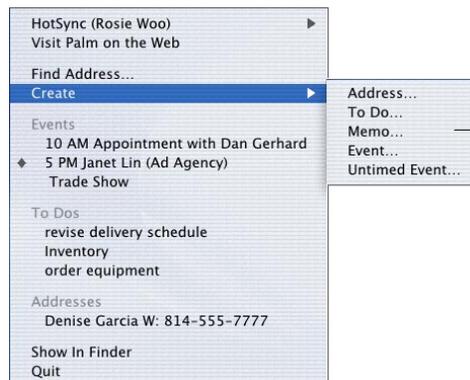


Click to remove the item from the Instant Palm Desktop menu

Creating items from the Instant Palm Desktop menu

You can create an event, To Do List item, address, or memo from the Instant Palm Desktop menu.

Choose Create from the Instant Palm Desktop menu, and then choose the type of item you want to create from the submenu.



You can create an event, To Do List item, address, or memo from the Instant Palm Desktop menu

Printing Double-Sided Pages

You can print on both sides of a page to produce compact printed output. You print one side first, then you are prompted to reinsert the printed pages to print the other side.

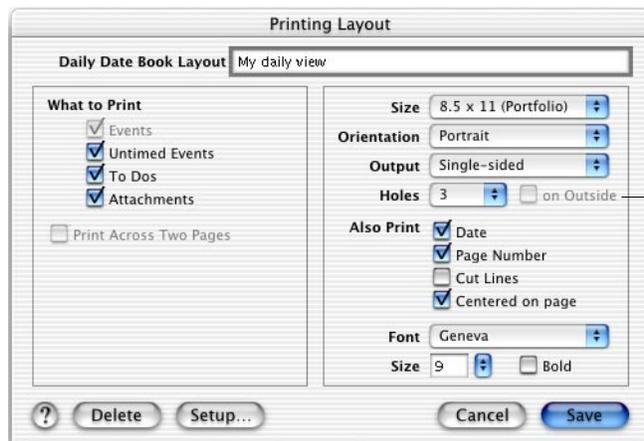
This appendix shows you how to print double-sided pages. Read the section for your particular printer. If there is no section for your printer, see the user's guide that came with your printer or consult your printer's manufacturer.

You can print your calendar and address book pages to fit several standard double-sided page organizers:

- 8.5 inch by 11 inch (Portfolio)
- 5.5 inch by 8.5 inch (Organizer)
- 4.25 inch by 6.75 inch (Compact)
- 3.75 inch by 6.75 inch (Sr. Pocket)
- 3.5 inch by 5 inch (Pocket)
- 3 inch by 5 inch (Memo)
- 2.75 inch by 5 inch (Jr. Pocket)
- 2.75 inch by 4.25 inch (MiniBook 8)
- 2 inch by 2.25 inch (MiniBook 12)

Marking paper for hole-punches

If you are not using pre-punched and pre-printed forms, you can print hollow circles where the holes should be punched and dashed lines where you should cut the paper. To mark the paper for hole-punching and cutting, choose Print from the File menu, and then choose Edit Layout from the Layout pop-up menu. The Printing Layout dialog box appears. For more information on editing layouts, see [Chapter 11](#).



Select these options to show you where to punch holes and cut away excess paper

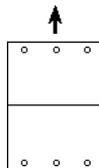
Apple LaserWriter/LaserWriter Plus, Hewlett-Packard DeskWriter

For the LaserWriter, LaserWriter Plus, and DeskWriter, these are the general steps:

- Print one side of the page
- Reverse the order of the pages
- Print the other side of the page

Follow the instructions in [Chapter 11](#) for printing. Follow these steps after printing has begun:

1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.



Edge with the holes enters the printer first

The printed pages come out of the printer in reverse order and printed side up. The first page printed (for example, January / April or the A's if you're printing addresses) is at the bottom of the stack.

While the first side is printing, you see a message on the screen.

2. Wait until all the pages have printed and then remove the printed pages.



- Reverse the order of the pages.

The first page that was printed should be on top of the stack of pages; the last page should be on the bottom of the stack.



- Insert the pages back into the paper tray, printed side up.

Make sure to feed the same edge in the printer as you did in step 2.

- Click Print Backs.

Apple Personal LaserWriter, Hewlett-Packard LaserJet IIP and IIIP

For the Personal LaserWriter SC/NT/LS and the LaserJet IIP/IIIP, these are the general steps:

- Print one side of the page
- Reverse the order of the pages
- Print the other sides of the pages

NOTE If the printer has a face-up tray, these steps assume the tray is closed.

Follow the instructions in [Chapter 11](#) for printing. Follow these steps after printing has begun:

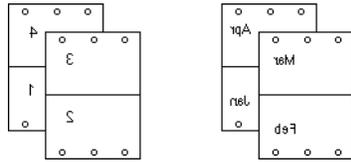
- If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.



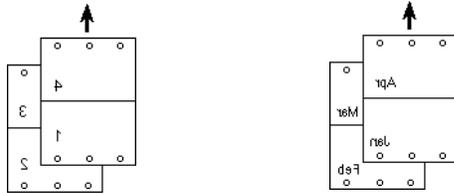
The printed pages come out of the printer with the first page at the bottom of the stack and the printed side down. The first page printed (for example, January/April or the A's if you're printing addresses) is at the bottom of the stack.

While the first side is printing, you see a message on the screen instructing you to remove the pages and reinsert them as appropriate.

2. Wait until all the pages have printed and then remove the printed pages.



3. Reverse the order of the pages so that the first page printed is on the bottom.



4. Insert the pages back into the paper tray, printed side down.
5. Click Print Backs.

Apple LaserWriter II series, Hewlett-Packard LaserJet III and IIID

For the LaserWriter II SC/NT/NTX/F/G and the LaserJet III/IIID, these are the general steps:

- Print one side of the page
- Reverse the order of the pages
- Print the other sides of the pages

NOTE These steps assume the printer's face-up tray is closed.

Follow the instructions in [Chapter 11](#) for printing. Follow these steps after printing has begun:

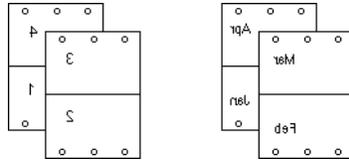
1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.



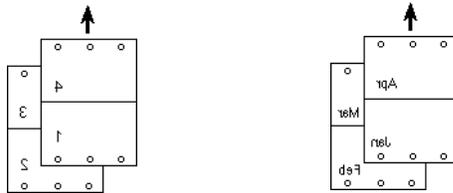
The printed pages come out of the printer with the first page at the bottom of the stack and the printed side down. The first page printed (for example, January / April or the A's if you're printing addresses) is at the bottom of the stack.

While the first side is printing, you see a message on the screen instructing you to remove the pages and reinsert them as appropriate.

2. Wait until all the pages have printed and then remove the printed pages.



3. Reverse the order of the pages so that the first page printed is on the bottom.



4. Insert the pages back into the paper tray, printed side down.
5. Click Print Backs.

Apple LaserWriter Pro 630 and 16/600PS

For the Apple LaserWriter Pro 630, 16/600, and some similar printers, these are the general steps:

- Print one side of the page
- Flip over the stack of pages
- Reverse the pages 180 degrees
- Print the other sides of the pages

Follow the instructions in [Chapter 11](#) for printing. Follow these steps after printing has begun:

1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.

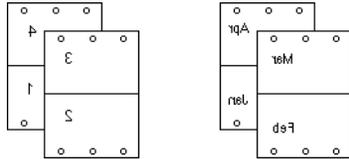


The printed pages come out of the printer with the first page at the bottom of the stack and the printed side down. The first page printed (for example,

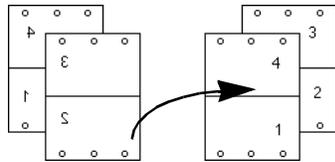
January / April or the A's if you're printing addresses) is at the bottom of the stack.

While the first side is printing, you see a message on the screen instructing you to remove the pages and reinsert them as appropriate.

2. Wait until all the pages have printed and then remove the printed pages.

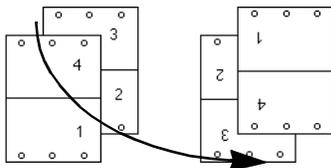


3. Flip over the stack so that the first page that was printed is at the top of the stack.



The first page that printed should be on top of the stack of pages; the last page should be on the bottom of the stack.

4. Turn the pages around 180 degrees.



5. Insert the pages back into the paper tray, printed side up.
6. Click Print Backs.

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