

About HotSync Manager command

- Purpose** To display the HotSync Manager software version and copyright information. You may be asked for the software version number when you call for Technical Support.
- Location** HotSync Manager menu (For Windows 95 and NT, click the HotSync Manager icon in the Taskbar System Tray at the right).

Change HotSync Action dialog box

Purpose To change the HotSync action of the selected conduit. A conduit determines how records are handled during HotSync. A conduit exists for each application.

There are three types of conduits:

- Application conduits — Specify how to update data for PalmPilot applications, such as the Date Book. Each PalmPilot application may have a conduit.
- Install conduit — Specifies whether or not to install new applications onto your PalmPilot. You must first use the application's Setup program to install the application onto your computer.
- System conduit — Specifies how to update data for PalmPilot software that does not have its own conduit, including Graffiti ShortCuts.

Notes The options in this dialog box depend on the conduit you select.

The HotSync action you select applies only to the next HotSync you perform. You must select the Save As Default check box to use an action in future HotSync procedures.

See also [Changing the HotSync Action](#)

To see Choose [Custom](#) from the HotSync menu to display the Custom dialog box. Select a conduit in the list, then click Change. Or, double-click the conduit in the list.

To use

Set As Default Check Box

Select the check box to make the option(s) you have selected the default action for future HotSync procedures.

Application Conduit Actions

- Synchronize the Files—Synchronizes the data on your PalmPilot and your computer so that both have the most current information.
- Desktop Overwrites PalmPilot—Copies data for the application from your computer to your PalmPilot, replacing any data on your PalmPilot for that application. Use this action to restore your PalmPilot.
- PalmPilot Overwrites Desktop—Copies data for the application from your PalmPilot to your computer, replacing any data on your computer for that application.
- Do Nothing—Perform no action during the HotSync.
- Set As Default—Select the check box to make the option you have selected the default action in future HotSync procedures.

Install Conduit Actions

- Install PalmPilot Applications—Installs applications onto your PalmPilot. Use the application's Setup program to install the software on your computer first.
- Do Nothing—Perform no action during the HotSync.
- Set As Default—Select the check box to make the option you have selected the default action in future HotSync procedures.

System Conduit Actions

- PalmPilot Overwrites Desktop—Copies data from your PalmPilot to your computer.
- Desktop Overwrites PalmPilot—Copies data from your computer to your PalmPilot. Use this action to restore your PalmPilot.
- Do Nothing—Perform no action during the HotSync.
- Set As Default—Select the check box to make the option you have selected the default action in future HotSync procedures.

Changing the HotSync Action

HotSync performs certain actions through conduits. A conduit provides information about how to transfer and translate data between your PalmPilot and your computer for a specific PalmPilot application or database during a HotSync.

Each conduit has a default action, but PalmPilot Desktop allows you to specify for each user account the action for each conduit for the next HotSync you will perform. In addition, you can specify to use the action you select as the default action for the conduit in the future.

To change the HotSync action:

1. Choose Custom from the HotSync Manager menu (click the HotSync icon in the Taskbar System Tray at the right).

The Custom dialog box appears.

2. From the list, select the user account for which you want to change the HotSync action.

3. Select an item in the Conduit Action list and click the Change button.

You can also double-click an item in the list. The Change HotSync Action dialog box appears.

4. Select the new action you want to use.

5. (Optional) Click Default to set the action you select as the default action for future HotSync procedures.

Important Unless you select the Default button, the action you select is used only during the next HotSync you perform.

6. Click OK.

7. Click Done.

Choosing HotSync Options

HotSync Manager allows you to choose:

- General settings for how you want HotSync Manager to start
- Communications settings for performing a Local or Modem HotSync

To choose HotSync Manager options:

1. Choose Setup from the HotSync Manager menu.

For Windows 95 and NT, click the HotSync Manager icon in the Taskbar System Tray at the right. The Setup dialog box appears with the General tab displayed.

2. Click the tab from which you want to choose HotSync settings. For more information about which settings to choose, see the Setup dialog box.
3. Choose the appropriate General, Local, or Modem settings.
4. Click the OK button.

HotSync Manager Help



Contents

- ◆ [HotSync](#)
- ◆ [HotSync Manager](#)
- [Starting HotSync Manager Options](#)
- [Changing the HotSync Action](#)
- [Choosing HotSync Options](#)
- [Creating a User Profile](#)
- [Using a User Profile for the First HotSync](#)
- [Creating a New User Account](#)
- [Performing the First HotSync](#)
- [Performing a Local HotSync](#)
- [Performing a Modem HotSync](#)
- [Performing a Modem HotSync: Computer Setup](#)
- [Performing a Modem HotSync: PalmPilot Setup](#)
- [Stopping a HotSync](#)
- [Using Password Protection](#)
- [Viewing the HotSync Log](#)
- [Using HotSync On a Second Computer](#)
- [Using Several PalmPilots](#)
- [Getting Technical Support](#)
- [Troubleshooting HotSync Problems](#)

Creating a New User Account

A user account associates a PalmPilot with the corresponding data in PalmPilot Desktop on your computer. A user account is identified by its unique name. User account names cannot be longer than 15 characters.

You specify the name for the initial user account the first time you perform a HotSync with a new PalmPilot. When you perform the first HotSync with a PalmPilot, HotSync Manager displays the [Users dialog box](#) for you to select an existing user account name or create a new one. For subsequent HotSyncs, HotSync Manager automatically determines the user account with which to synchronize data.

Be sure to use a different user account name for each PalmPilot. You might create additional user accounts so that you can use HotSync Manager on one computer to maintain data for several PalmPilots (see [Using Several PalmPilots](#)). If you use several user accounts, HotSync Manager automatically determines the correct data to synchronize with a PalmPilot when you perform a HotSync.

To create a new user account:

1. Perform the first HotSync with a PalmPilot. (See [Performing The First HotSync](#))
The [Users dialog box](#) appears.
2. Click New.
The [New User dialog box](#) appears.
3. Type a name for the new user account.
4. Click OK.

Creating a User Profile

You can download data into a PalmPilot at the first-time HotSync without having it associated with a user account. This makes it possible to pre-configure a number of PalmPilots with specific information (such as a company phone list) before they are distributed to users.

To use a Profile for the first-time HotSync:

1. Create the user Profile account.
Choose Users from the PalmPilot Desktop Tools menu. The Users dialog box appears.
2. Click the Profiles button in the Users dialog box.
The Profiles dialog box appears.
3. Click the New button in the Profiles dialog box.
The New Profile dialog box appears.
4. Type a name for the new User Profile.
5. Click the OK button.
6. Create the User Profile information on the PalmPilot Desktop by entering or importing the information in the appropriate application.
You can also use the Instapp to download applications to the PalmPilot via the Profile account.
7. Place the PalmPilot in its cradle.
8. Make sure that HotSync Manager is running. See Starting HotSync Manager Options
9. Choose Local in the HotSync Manager menu or PalmPilot Desktop HotSync menu.
10. Press the HotSync button on the PalmPilot.
Because the PalmPilot is new and not yet associated with a user account, the Users dialog box appears.
11. Click the Profiles button.
The Profiles dialog box appears.
12. Select the Profile name that you want to load into the PalmPilot.
13. Click the OK button.
A confirmation message appears informing you that installing a Profile will overwrite all data currently on the PalmPilot and asking if you are sure that you really want to perform this command.
14. Click the Yes button.
The Profile data is transferred to the PalmPilot. The next time you perform a HotSync, PalmPilot Desktop prompts you for a User name to be associated with the PalmPilot.

Custom command

Purpose To display the Custom dialog box which allows you to change the HotSync action for a conduit for each user account. A conduit provides information about how to transfer and translate data between your PalmPilot and your computer for a specific PalmPilot application or database during a HotSync.

See also [Changing the HotSync Action](#)

Location HotSync Manager menu. You can also choose Custom in the PalmPilot Desktop menu if HotSync Manager is running.

Custom dialog box

- Purpose** Allow you to view and/or change the HotSync conduits and actions for each user account.
- See also** [Changing the HotSync Action](#)
- To see** Choose [Custom](#) from the HotSync Manager menu (For Windows 95 and NT, click the HotSync Manager icon in the Task Bar System Tray at the right.)
- To use**
- User List Choose the user account for which you want to change the HotSync action.
- Conduit Action List Shows the HotSync conduits and their actions. Select a conduit action that you want to change.
- Change Click to display the Change HotSync Action dialog box that allows you to change the selected conduit action.
- Default Click to display the default HotSync action for all conduits.

Exit command

- Purpose** To exit HotSync Manager so that it does not monitor the serial port. You may need to exit HotSync Manager to allow another application to use the serial port.
- Note** The Exit HotSync Manager dialog box confirms whether or not you really want to exit HotSync Manager. Click the Don't Ask Again check box, if you don't want the dialog box to appear when you choose the Exit command.
- Location** Choose Exit in the HotSync Manager menu (For Windows 95 and NT, click the HotSync Manager icon in the Taskbar System Tray at the right.)

Help command

- Purpose** To display the HotSync Manager online Help system that describes how to use HotSync Manager.
- Location** HotSync Manager menu (For Windows 95 and NT, click the HotSync Manager icon in the System Tray of the Taskbar at the right.)

HotSync

HotSync is a two-way synchronization process between one or more PalmPilot records and PalmPilot Desktop records on your computer. Changes that you make on your PalmPilot or PalmPilot Desktop are reflected on both platforms after a HotSync. HotSync only synchronizes the needed portions of files, thus reducing HotSync time.

For you to HotSync, HotSync Manager must be running on your computer. See [HotSync Manager](#).

You can perform two types of HotSync procedures:

- **Local HotSync** You use the PalmPilot cradle, which connects to a serial port on your computer. You should perform a Local HotSync the first time you synchronize your PalmPilot. See [Performing the First HotSync](#) and [Performing a Local HotSync](#).
- **Modem HotSync** You use two modems: one connected to the PalmPilot, the other to your computer. A Modem HotSync allows you to perform a remote HotSync so you can synchronize data when you are traveling. See [Performing a Modem HotSync](#).

See also [Starting HotSync Manager Options](#)

[Choosing HotSync Options](#)

[Changing the HotSync Action](#)

[Creating a New User Account](#)

[Creating a User Profile](#)

[Stopping a HotSync](#)

HotSync Log dialog box

Purpose To display information about the last 10 HotSync procedures you have performed, including information about successful synchronizations and any error conditions. An equivalent, but abbreviated, log is maintained on the PalmPilot. Each user account has an independent log and the HotSync Log dialog box has a drop-down list to allow you to select which log to view.

See also [Viewing the HotSync Log](#)

To see Click the View Log button in the [HotSync Problem dialog box](#) that appears if an error occurs during a HotSync. You can also choose the View Log in the HotSync Manager menu (For Windows 95 and NT, click the HotSync Manager icon in the Taskbar System Tray). You can also choose View Log in the PalmPilot Desktop HotSync menu if HotSync Manager is running.

To use

List Displays information about the last 10 HotSync procedures you have performed.
You can select the text and copy it (Ctrl + C), then paste it into another application.

HotSync Manager

HotSync Manager is an independent application that oversees the HotSync process that you perform using the PalmPilot cradle or a modem. See [HotSync](#). HotSync Manager runs in the background monitoring your computer's serial port and listening for a HotSync command from the PalmPilot. Therefore, HotSync Manager must run on your computer to perform a HotSync. It can run automatically or you can run it manually.

You may need to exit HotSync Manager to allow another application to use the serial port.

HotSync Manager can perform a HotSync even when PalmPilot Desktop is not running.

HotSync Manager shares some of the same menu commands as PalmPilot Desktop when both are running: [Local](#), [Modem](#), [Setup](#), [Custom](#) and [View Log](#). In PalmPilot Desktop, the Local and Modem commands are always available even if HotSync Manager is not running. However if HotSync Manager is not running, the Custom, View Log, and Setup commands are not available.

From HotSync Manager, you can:

- Prepare your computer for a Local or Modem HotSync. See the [Local command](#) and the [Modem command](#).
- Choose how you want HotSync Manager to start. See the [Setup dialog box](#).
- Choose Local or Modem HotSync communications options. See the [Setup dialog box](#).
- Choose what actions you want to take place during the HotSync process. See [Changing the HotSync Action](#).
- View the HotSync Log. See [Viewing the HotSync Log](#).
- View the HotSync Manager software copyright and version number. See the [About HotSync Manager command](#).
- View online Help about HotSync Manager. See the [Help command](#).
- Exit HotSync Manager so another application can use your computer serial port. See the [Exit command](#).

See also [Starting HotSync Manager Options](#)

[Performing a Local HotSync](#)

[Performing a Modem HotSync](#)

HotSync Problem dialog box

Purpose	Allows you to view explanations of problems that occur during the HotSync process, and allows you to view the HotSync Log dialog box .
To see	You see this dialog box only if an error occurs during a HotSync.
To use	
View Log	Click to see the HotSync Log dialog box that displays information about the last 10 HotSync procedures you performed.

HotSync Progress dialog box

Purpose	Allows you to view the progress of a HotSync. The HotSync Progress dialog box also allows you to view the user account name and to cancel the HotSync.
See also	Performing a Local HotSync Performing a Modem HotSync Stopping a HotSync
To see	Start the HotSync process.
To use	
Status	Displays the status of the HotSync process.
User	Displays the user account name assigned to the PalmPilot on which a HotSync is currently being performed. Note If you are performing a HotSync with your PalmPilot for the first time, the Users dialog box appears for you to select a user account to assign to the PalmPilot.
Cancel	Click to stop the HotSync process. If you click Cancel, the Status field changes to indicate that the HotSync is stopping, then the HotSync Progress dialog box closes. A similar message appears on your PalmPilot.

Local command

Purpose To prepare your computer to perform a Local HotSync using the PalmPilot cradle.

Note When you choose the Local command, HotSync Manager monitors the serial port, selected for Local HotSync in the [Setup dialog box](#), listening for a HotSync command.

See also [Performing a Local HotSync](#)

Location HotSync Manager menu (For Windows 95 and NT, click the HotSync Manager icon in the Taskbar System Tray at the right.)

Modem command

Purpose To prepare your computer to perform a Modem HotSync.

Notes When you choose the Modem command, HotSync Manager monitors the serial port selected for Modem HotSync in the Setup dialog box.

It also sends the Setup String specified in the Setup dialog box to the modem and places the modem in auto-answer mode.

Note In auto-answer mode, your modem answers any calls received by the phone line it is using.

See also Performing a Modem HotSync

Location HotSync Manager menu (For Windows 95 and NT, click the HotSync Manager icon in the Taskbar System Tray.)

New Profile dialog box

Purpose To allow you to type a name for a new User Profile that will display in the Profiles dialog box. A Profile is a unique name for information that you can download to a number of PalmPilots without associating to a specific user account. You can download User Profile information before you perform the first HotSync (for example, a company phone list for the Sales force).

See also [Users dialog box](#)
[Profiles dialog box](#)
[Creating a User Profile](#)

To see Choose Users from the PalmPilot Desktop Tools menu. In the Users dialog box, click the Profiles button. Click the New button.

To use

Enter a new profile name

Type a name for the new Profile that you want to create in the text box. The name displays in the Profiles dialog box.

New User dialog box

Purpose	To create and name a new user account. A user account associates a PalmPilot with the corresponding data in PalmPilot Desktop on your computer.
Notes	<p>When you install HotSync Manager, you provide a name which the Setup program uses to create the initial user account. You can create new user accounts when you perform the first HotSync with a PalmPilot.</p> <p>You should use a unique name when creating a new user account. If you type a name used by an existing user account, a message box appears to explain the problem. User account names cannot be longer than 15 characters.</p>
See also	<p>Creating a New User Account</p> <p>Using Several PalmPilots</p>
To see	HotSync Manager displays the Users dialog box when you perform the first HotSync with a PalmPilot. In the Users dialog box, click the New button to create a new user account.
To use	
Name field	Type the name for the user account.

Performing a Local HotSync

To perform a Local HotSync you use the PalmPilot cradle connected to your computer. Performing a Local HotSync is the simplest way to synchronize the data on your PalmPilot and computer. You should perform a Local HotSync the first time you synchronize your data. See [Performing the First HotSync](#).

To perform a Local HotSync:

1. Connect the PalmPilot cradle into the computer's serial port you selected during installation.

If you are unsure of your computer's serial port, see your computer user's manual.

2. Turn on your computer.
3. Start HotSync manager. See [Starting HotSync Manager Options](#).
4. Make sure the serial port where you connected the PalmPilot cradle matches the serial port setting in the [Setup dialog box](#).

You do not need to specify any communication settings on the PalmPilot to perform a Local HotSync. Unless you change your system, you only need to perform this step once.

5. Choose [Local](#) in the HotSync Manager menu.
5. Turn on your PalmPilot and place it in the cradle.
6. Start the HotSync process.

Press the HotSync button on the PalmPilot. You can also start a HotSync by tapping the Local Sync button on the HotSync screen of your PalmPilot. The HotSync synchronization process begins and the [HotSync Progress dialog box](#) appears on your computer and on your PalmPilot.

See also [Performing a Modem HotSync](#)

Performing a Modem HotSync

To perform a Modem HotSync you use two modems – one connected to your PalmPilot, the other connected to your computer – to communicate over a telephone line. A Modem HotSync allows you to synchronize your data when you cannot connect your PalmPilot directly to your computer, such as when you are traveling.

Tip You should perform your first Modem HotSync when you can access both modems and your computer. This allows you to change communications settings both on your PalmPilot and your computer, if necessary.

Note You should perform a Local HotSync the first time you synchronize your PalmPilot. See [Performing a Local HotSync](#).

To perform a Modem HotSync:

1. Configure your PalmPilot for a Modem HotSync. See [Performing a Modem HotSync: PalmPilot Setup](#).
2. Start HotSync Manager and configure it for a Modem HotSync. HotSync Manager monitors the communications port listening for a Modem HotSync command from the PalmPilot. See [Performing a Modem HotSync: Computer Setup](#).
3. Make sure your modem is connected and turned on. The modem you use must have an on-off switch. Your PalmPilot cannot "wake up" a modem with an auto-off feature.
4. Ensure that no other communications application is running on the serial port.
5. Connect one end of the special modem cable to the PalmPilot serial connector. Then connect the other end of the cable to your modem. To order the PalmPilot modem cable see [Technical Support](#).
6. Turn on your PalmPilot.
7. Tap Applications on the PalmPilot screen.
8. Tap the HotSync application.
9. Tap the Modem Sync button.

The HotSync application performs these steps:

- Opens communications with the local modem and configures it.
- Instructs the modem to dial the access number.
- Waits for the modems to connect.
- When the connection is established, performs the HotSync.
- When the HotSync is completed, closes the connection and reports the results to you. When finished, the PalmPilot displays a final HotSync message.

Note If you have any problems conducting a successful HotSync, see [Troubleshooting: Modem HotSync Problems](#).

Performing a Modem HotSync: Computer Setup

Before you can perform a Modem HotSync you need to set up communications parameters on your computer and prepare it to perform the procedure.

To set up your computer for a Modem HotSync:

1. Make sure the modem is connected to your computer and that the modem is turned on.
2. Start HotSync Manager if it is not already running.
3. Choose Setup from the HotSync Manager menu (click the HotSync Manager icon in the Taskbar System Tray).
You can also choose Setup from the PalmPilot Desktop HotSync menu. The Setup dialog box appears.
4. Click the Modem tab.
5. Select the options necessary to perform the Modem HotSync. See the Setup dialog box.
6. Choose Modem from the HotSync Manager menu (For Windows 95 and NT, click the HotSync Manager icon in the Taskbar System Tray.)

HotSync Manager monitors the serial port selected for Modem HotSync in the Setup dialog box for a Modem HotSync command. HotSync Manager sends the Setup String specified in the Setup dialog box to the modem and places the modem in auto-answer mode.

Important In auto-answer mode, your modem answers any calls received by the phone line it is using.

After you have prepared your computer, you are ready to set up your PalmPilot. Go to [Performing a Modem HotSync](#).

Performing a Modem HotSync: PalmPilot Setup

To perform a Modem HotSync, you must specify modem and other communications parameters on your PalmPilot. To do this, you need the following information:

- The access number for your computer.
- Whether or not you need to dial an outside line prefix.
- Whether or not the line you are using has call waiting. If it does, you need the code to disable call waiting.
- If you want to use a calling card, your calling card number.

To set up your PalmPilot for a Modem HotSync:

1. Turn on the PalmPilot and tap the Applications icon

2. Tap the HotSync icon.

The HotSync screen appears.

3. Tap the Enter Phone # button below the Modem Sync icon.

The Phone Setup screen displays from which you can enter the following information:

- **Phone #** Enter the phone number to access your computer.
- **Dial Prefix** To dial an outside line prefix, select the check box. If necessary, enter a different outside line prefix. (The default is "9," – the comma introduces a pause.)
- **Disable call waiting** If the phone line has call waiting, select the check box. If necessary, enter a different code to disable call waiting. (The default is "1170,")
- **Use calling card** To use a calling card, select the check box and enter the calling card number.

4. Tap OK to return to the HotSync dialog box.

5. Tap the Modem Setup button.

- **Line type** Select TouchTone or Rotary.
- **Modem** Select the modem type that best describes the modem connected to your PalmPilot. The modem type determines the modem command string that appears in the String field.
If none of the modem types are appropriate for your modem, you can type a command string in the String field. The Custom item appears in the Modem options.
- **Speed** Select the speed for the Modem HotSync.
- **String** The command string to configure your modem. The PalmPilot sends these commands to your modem when you start a Modem HotSync.
To specify this setting, choose a modem type from the Modem options or type a command string in the field.

Note Consult the manual that came with your modem or contact the manufacturer to learn how to configure your modem.

6. When you finish, tap Done.

When you have set up your PalmPilot, you are ready to setup your computer. Go to [Performing a Modem HotSync: Computer Setup](#)

Performing the First HotSync

During the first HotSync, accounts must be established on both the PalmPilot Desktop and the PalmPilot. For the first HotSync, perform a Local HotSync.

To perform the first Local HotSync:

1. Connect the cradle to a serial port on your computer.
2. Place your PalmPilot into the cradle.
3. Start your computer if it is not already running and start HotSync Manager.

HotSync Manager may run automatically or you may need to start it. See [Starting HotSync Manager Options](#).

4. Choose [Setup](#) in the HotSync Manager menu.

For Windows 95 and NT, click the HotSync Manager icon in the Task Bar System Tray at the right. You may need to set communications parameters using the [Setup dialog box](#).

5. Choose [Local](#) in the HotSync Manager menu.
6. Start HotSync.

Push the HotSync button on the PalmPilot cradle or tap Applications, HotSync and then Local on the PalmPilot screen. The [HotSync Progress dialog box](#) appears. You will be prompted to enter a password if you have assigned a password to your PalmPilot. See [Using Password Protection](#).

7. The [Users dialog box](#) appears for you to select the user account to assign to the PalmPilot.

Important Be sure to use a different user account name for each PalmPilot. Never attempt to synchronize more than one PalmPilot to the same user name.

8. Click the OK button. The HotSync procedure continues.

Note If a problem occurs, HotSync Manager displays the [HotSync Problem dialog box](#) to explain the problem.

When the HotSync finishes, the HotSync Progress dialog box closes. If a problem occurs, see [Troubleshooting: Local HotSync Problems](#)

See also [Performing a Local HotSync](#)
[Performing a Modem HotSync](#)

Profiles dialog box

Purpose	To allow you to create, rename, or delete a User Profile. A User Profile is information that you can download to PalmPilot Desktop before you perform the first HotSync.
See also	Creating a User Profile Using a User Profile for the First HotSync New Profile dialog box
To see	Click the Profiles button in the Users dialog box . The Users dialog box appears during the first HotSync with a new PalmPilot. See Performing the First HotSync .
To use	
New	Displays the New Profile dialog box so you can name a new User Profile. The new Profile name displays in the Profiles dialog box.
Delete	Displays a delete Profile confirmation message. You must select a Profile before you click the Delete button.
Rename	Displays the Rename Profile dialog box so you can change the name of the selected Profile.
User	Displays the Users dialog box.

Setup command

- Purpose** To display the [Setup dialog box](#) to select how you want HotSync Manager to start and select HotSync communications parameters.
- See also** [Performing a Local HotSync](#)
[Performing a Modem HotSync: Computer Setup](#)
[Choosing HotSync Options](#)
- Location** HotSync Manager menu (For Windows 95 and NT, click the HotSync Manager icon in the Taskbar System Tray.) You can also choose Setup from the PalmPilot Desktop HotSync menu if HotSync Manager is running.

Setup dialog box

Purpose To select how you want to start HotSync Manager (General tab) and HotSync communications parameters (Local and Modem tabs).

See also [Performing a Local HotSync](#)
[Performing a Modem HotSync: Computer Setup](#)

To see Choose [Setup](#) from the HotSync Manager menu (click the HotSync Manager icon in the Taskbar System Tray). You can also choose Setup from the PalmPilot Desktop HotSync menu.

To use

The Setup dialog box includes three tabs: General, Local, and Modem. You can move between tab pages in the Setup dialog box by pressing Ctrl + Tab.

For more information about the options on each tab click a tab name here.

[General Tab](#)

[Local Tab](#)

[Modem Tab](#)

Setup dialog box (General Tab)

The General Tab displays when the Setup dialog box opens. The General tab allows you to select how you want HotSync Manager to start running. HotSync Manager must be running for you to perform a HotSync.

General Tab Options

Always available (put in Startup folder)

HotSync Manager runs automatically when you start your computer. You must restart your computer for this option to begin working.

Available only when PalmPilot Desktop is running

HotSync Manager starts automatically when PalmPilot Desktop starts. HotSync Manager stops running when you exit PalmPilot Desktop.

Manual (you start HotSync Manager yourself)

You must start HotSync Manager by double-clicking its application icon.

See also [Setup dialog box](#)
[HotSync Manager](#)

Setup dialog box (Local Tab)

The Local tab in the Setup dialog box allows you to select the serial port where you connected the PalmPilot for a Local HotSync. From this tab, you can also select the speed at which you want the Local HotSync to occur.

Local Tab Options

Serial Port Select the serial port where you connected the PalmPilot cradle.

Speed Select the speed for the Local HotSync. Select As Fast As Possible (the default) for HotSync Manager to use the fastest possible speed, or select a specific speed.

Note Select a lower speed if you experience problems with the speed set at As Fast As Possible.

See also [Setup dialog box](#)
[HotSync Manager](#)
[Performing a Local HotSync](#)

Setup dialog box (Modem Tab)

The Modem tab in the Setup dialog box allows you to select the the serial port, speed, and modem settings for a Modem HotSync. Click the tab to see the available Modem HotSync options.

Modem Tab Options

Serial Port	Select the serial port where you connected the modem cable.
Speed	Select the speed for the Modem HotSync. The default rate As Fast As Possible allows the modems to find and use the fastest transfer rate. Initially try the As Fast As Possible option and adjust the speed downward if there are problems. Note Select a lower speed if you experience problems with the speed set at As Fast As Possible.
Modem	Select the modem type or manufacturer that best describes your modem. The modem type determines the modem command string that appears in the Setup String field. If none of the modem types are appropriate for your modem, you can type a command string in the Setup String field. Custom appears in the drop-down menu.
Setup String	The command string that configures your modem. HotSync Manager sends these commands to your modem when you choose <u>Modem</u> from the HotSync Manager menu. To specify this setting, select one of the modem types from the Modem drop-down menu or type a command string in the field. Note Consult the manual that came with your modem or contact the manufacturer to learn how to configure your modem.

See also [Setup dialog box](#)
[HotSync Manager](#)
[Performing a Modem HotSync](#)

Starting HotSync Manager Options

HotSync Manager must be running on your computer to perform a HotSync. By default, HotSync Manager starts automatically when you start your computer. You can choose whether or not to have HotSync Manager started automatically in the [Setup dialog box](#).

To choose how to start HotSync Manager:

1. Start HotSync Manager if it is not already running.
2. Choose [Setup](#) from the HotSync Manager menu.

The Setup dialog box appears with the General tab displayed.

3. Check the check box that indicates how you want to start HotSync Manager. For more information about these options, see the [Setup dialog box](#) (General tab).
4. Click the OK button.

Stopping a HotSync

You can stop a HotSync that is in progress by clicking the Cancel button in the [HotSync Progress dialog box](#). The HotSync Progress dialog box appears on the PalmPilot unit or on your computer screen during the HotSync process.

Note Stopping a HotSync may take several seconds.

Technical Support

If you have a problem using your PalmPilot or HotSync Manager, first look in [Troubleshooting](#) for help solving the problem. You can also find troubleshooting help in the manuals that came with your PalmPilot and HotSync Manager. The Read me file that the Setup program installed with your copy of HotSync Manager provides additional information that may help you solve the problem.

If you are unable to resolve the problem, you can contact Technical Support for assistance. Before you do, be sure to have available the following information:

- The version of HotSync Manager you are using. Choose [About HotSync Manager](#) from the HotSync Manager menu.
- The version of DOS/Windows or the Mac OS you are using on your computer.
- A description of the problem you are having, including the text of any error messages you might receive. If possible, experiment to see if you can determine the conditions that produce the problem.

Phone Lines

- Phone support (847) 676-1441
Monday through Friday 8 AM — 6 PM Central Standard Time
- Facsimile (Fax) (847) 676-7323

To Order PalmPilot Parts and Accessories

- U.S. & Canada (800) 881-7256
fax: (800) 437-3299
- U.K. 0800 22 52 51 (toll free)
fax: 0118 922 82 99
- Other Europe/Middle East/Africa
33 (0) 3 20 19 19 39
fax: 33 (0) 3 20 91 99 27
- Australia/New Zealand
(61) 3 9482 6557
fax: (61) 3 9482 1895
- Elsewhere (408) 848-5604
fax: (408) 848-5784

Online Technical Support

- Fax on Demand 847-762-6163
- U.S. Robotics BBS (847) 982-5092
- America Online User Forum
Keyword: PILOT
- CompuServe User Forum
GO palmb>Palm Computing/U.S. Robotics
- Internet support@palm.usr.com
- Web Access <http://www.usr.com/palm>

For Technical Support outside the U.S. and Canada, please contact your local U.S. Robotics representative.

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Troubleshooting

If you have a problem using HotSync Manager or performing a HotSync, locate the type of problem you are having in the following list. See the topic for suggestions that may help you solve the problem.

- Local HotSync does not complete successfully.
See [Troubleshooting: Local HotSync Problems](#).
- Modem HotSync does not complete successfully.
See [Troubleshooting: Modem HotSync Problems](#).

See also [Technical Support](#)

Troubleshooting: Local HotSync Problems

Try these things, if Local HotSync does not complete successfully.

- Make sure HotSync Manager is running. If HotSync Manager is running, exit and restart it. See [Starting HotSync Manager Options](#).
- Make sure you have selected [Local](#) from the HotSync Manager menu or the PalmPilot Desktop menu.
- Make sure the cable from the PalmPilot cradle is connected properly to a serial port on your computer.
- Make sure you have selected in the [Setup dialog box](#) (Local tab), the serial port where you connected the PalmPilot cradle.
- Try a lower baud rate from the Local tab in the Setup dialog box.
- Make sure you are not running another program — such as America Online, CompuServe, or WindFax — that is using the serial port you selected in the Setup dialog box.
- Read the [HotSync Log](#) for the user account for which you are performing a HotSync.

See also [Performing a Local HotSync](#)
[Choosing HotSync Options](#)
[Viewing the HotSync Log](#)

Troubleshooting: Modem HotSync Problems

Try these things if the Modem HotSync does not complete successfully. Read the [HotSync log](#) for the user account for which you are performing a Modem HotSync. See [Viewing the HotSync Log](#).

On your computer:

- Make sure your computer is turned on, and that it does not shut down automatically as part of an energy-saving feature.
- Make sure the modem connected to your computer is turned on and is connected to the outgoing phone line.
- Make sure that your modem doesn't have an auto-off feature enabled.
- Make sure the modem is connected properly to a serial port on your computer and is connected to the incoming phone line.
- Make sure the Setup String you have selected in the [Setup dialog box](#) configures your modem correctly. You may need to select a different Modem Type or enter a custom Setup String. See [Performing a Modem HotSync: Computer Setup](#). Most modems have a Setup String that causes them to send initial connection sounds to a speaker. You can use these sounds to check that modem connections are good.
- Make sure the Speed you have selected in the Setup dialog box is appropriate for your modem. If you are having problems using the As Fast As Possible option or a specific speed, try using a slower speed.
- Make sure you have selected [Modem](#) from the Options menu.
- Make sure you are not running another program — such as America Online, CompuServe, or WindFax — that is using the serial port you selected in the Setup dialog box.
- Make sure your modem is reset before you try again. (Turn off your modem, wait a minute, then turn it back on.)

On your PalmPilot:

- Make sure you are using the PalmPilot modem cable to connect to your modem. See [Performing a Modem HotSync](#).
- Important** Do not attempt to use other cables to connect a PalmPilot to a modem.
- Make sure the modem cable is connected properly to your PalmPilot and your modem.
- Make sure your modem is turned on.
- Make sure the modem you are using with your PalmPilot has an on-off switch. Your PalmPilot cannot "wake up" a modem that has an auto-off feature.
- Make sure the dialing instruction dials the correct phone number. See [Performing a Modem HotSync: PalmPilot Setup](#).
- If you need to dial an outside line prefix, make sure you have selected the Dial Prefix option on your PalmPilot and entered the correct code.
- If the telephone line you are using has call waiting, make sure you have selected the Disable Call Waiting option under Modem Sync Phone Setup on your PalmPilot and entered the correct code.
- Make sure the telephone line you are using is not noisy, which can interrupt communications.
- Make sure your modem is reset before you try again. (Turn off your modem, wait a minute, then turn it back on.)

Users dialog box

Purpose To select a user account to assign to your PalmPilot. You can also create, delete, or rename a user account. You can also select a User Profile name or create a new one.

See also [Creating a New User Account](#)
[Creating a User Profile](#)

To see HotSync Manager displays this dialog box only when you perform the first HotSync with a PalmPilot.

To use

Select a User List Allows you to select a user account name to assign to the PalmPilot.

New Click to display the [New User dialog box](#) to create a new user account.

Delete Click to delete the selected user account name in the list.

Rename Click to display the Rename User dialog box from which you can rename the selected user account.

Profiles Click to display the [Profiles dialog box](#) from which you can create, delete, or rename a User Profile. You can also display the Users dialog box.

Using HotSync On a Second Computer

You can use HotSync to synchronize the information on your PalmPilot with a second computer. This allows you to maintain, for example, the same information on your PalmPilot, your computer at work, and your computer at home.

Note HotSync may be slower sometimes when you are updating information between two computers.

To use HotSync on a second computer:

1. Perform a HotSync with your PalmPilot and your office computer.

If you are performing the first HotSync with your PalmPilot, HotSync Manager displays the [Users dialog box](#) for you to select the user account name to assign to the PalmPilot.

Important Be sure to use a different user account name for each PalmPilot.

2. Perform a HotSync with your PalmPilot and your home computer.

HotSync Manager automatically creates the user account name assigned to the PalmPilot on your home computer.

See also [Performing a Local HotSync](#)
[Performing a Modem HotSync](#)
[Using Several PalmPilots](#)
[Creating a New User Account](#)

Using Password Protection

If you have assigned a password to your PalmPilot and you have not performed a HotSync, PalmPilot Desktop will prompt for that password before the HotSync process begins. You will be prompted regardless of whether or not you have enabled Hide Private Records on the PalmPilot. This prevents unauthorized people from performing a HotSync with your PalmPilot on any computer running PalmPilot Desktop.

Using Several PalmPilots

You can use HotSync Manager on one computer to back up and synchronize several PalmPilots. For example, a sales manager might want to provide a PalmPilot to several sales representatives. The manager can then use HotSync to collect information from each PalmPilot and store it in a central location.

You should use a different user account for each PalmPilot that you use with HotSync Manager. See [Creating a New User Account](#). By doing so, HotSync Manager keeps the information for each PalmPilot separate. In addition, when you perform a HotSync, HotSync Manager automatically synchronizes your PalmPilot with the data for the user account assigned to the PalmPilot.

To set up using several PalmPilots:

1. Perform an initial HotSync with each PalmPilot. See [Performing The First HotSync](#).
2. When the [Users dialog box](#) appears, select a user account name to assign to your PalmPilot and click OK.

You can also create a new user account name to assign to your PalmPilot. See [Creating a New User Account](#).

Important Be sure to use a different user account name for each PalmPilot. If you have assigned a password to your PalmPilot and you have not performed a HotSync with the computer, PalmPilot Desktop will prompt you to enter the password assigned to your PalmPilot. See [Using Password Protection](#).

If you work with several PalmPilots, you may need to transfer information from one PalmPilot to another. Rather than synchronizing the PalmPilots using the same user name, you should copy the records in one user account on your computer and paste them in the other user account.

Warning Synchronizing two or more PalmPilots with the same user name can cause unpredictable results and possibly loss of your information.

Using a User Profile for the First HotSync

You can download data into a PalmPilot at the first-time HotSync without having it associated with a user account. This makes it possible to pre-configure a number of PalmPilots with specific information (such as a company phone list) before they are distributed to users.

To use a Profile for the first-time HotSync:

1. Turn on a new PalmPilot.
2. Place the PalmPilot in its cradle.
3. Press the HotSync button on the PalmPilot.

Because the PalmPilot is new and not yet associated with a user account, the Users dialog box appears on the desktop.

4. Click the Profiles button.

The Profiles dialog box appears.

5. Select the Profile that you want to load into the PalmPilot.
6. Click the OK button.

A confirmation message appears notifying you that installing a Profile will overwrite all data currently on the PalmPilot and asking if you are sure that you want to do this command.

7. Click the Yes button.

The Profile data is transferred to the PalmPilot. The next time you perform a HotSync, PalmPilot Desktop prompts you for a User name to be associated with the PalmPilot.

View Log command

Purpose To display the HotSync Log dialog box so you can view the last 10 HotSync procedures you performed. Each user account has an independent log and the HotSync Log dialog box has a drop-down list to allow you to select which log to view.

See also [HotSync Log dialog box](#)

To see Click the View Log button in the HotSync Problem dialog box that appears only if a problem occurs during the HotSync synchronization process. You can also choose View Log from the HotSync Manager menu (click the HotSync Manager icon in the Taskbar System Tray). You can also choose View Log in the PalmPilot Desktop HotSync menu if HotSync Manager is running.

Viewing the HotSync Log

The HotSync Log dialog box provides information about the previous 10 HotSync procedures you have performed. It tells you which application databases were updated. If a problem occurs, the dialog box provides information about the error. Each user account has an independent log and the HotSync Log dialog box has a drop-down list to allow you to select which log to view.

You can also view the HotSync Log by choosing View Log from the HotSync Manager menu (click the HotSync Manager icon in the Taskbar System Tray). You can also choose View Log from the PalmPilot Desktop HotSync menu if HotSync Manager is running.

If a problem occurs while HotSync Manager is performing a HotSync, it displays the HotSync Problem dialog box to explain the problem. You can then click the View Log button to display the HotSync Log dialog box.

