Palm™ Desktop Software for the Macintosh User's Guide

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About This Book

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

This handbook is designed to help you get up and running quickly with Palm Desktop software. The beginning 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 handbook 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 handbook, Palm Desktop software contains online help that is available from the main menu bar and from the help button on each dialog box.

Chapter 1

Introducing Palm™ Desktop Software

This chapter will get you started with Palm™ Desktop software, and introduce you to some of its features.

Palm Desktop software has four modules: calendars, contacts, notes, and tasks. You can add information to any module at any time. You can also connect, or attach, any item to any other, so you can jump right to the information you need. You can check your schedule and search for information directly from the menu bar, without even starting the main application.

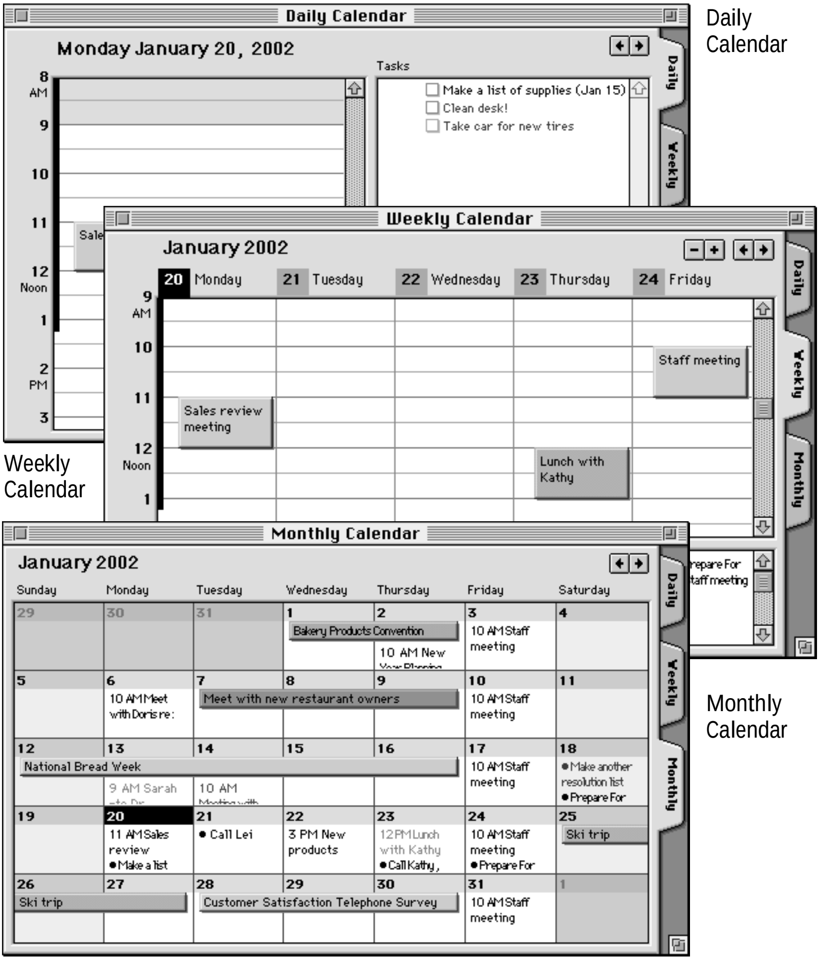
The information from each of these modules is synchronized with the information in the basic applications on your Palm Computing® handheld when you perform a HotSync® operation.

About the modules

Calendars

The calendar manages your appointments and events. You can choose among three calendar views:

- Daily Calendar
- Weekly Calendar
- Monthly Calendar



Daily Calendar

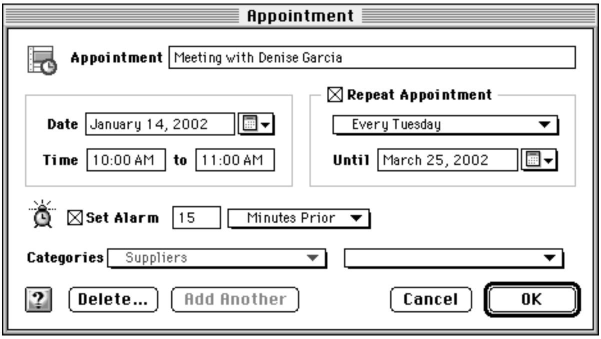
Weekly Calendar

Monthly Calendar

You can attach contacts, notes, and tasks to any calendar item. You can set appointments to appear once, or repeat over an interval you set. You can create event banners to show special days, such as anniversaries, birthdays, and vacations. An event banner can span one day or several.

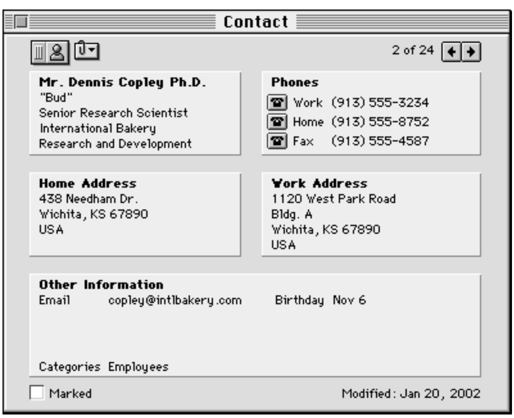
Example

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



Contacts

The contacts module keeps track of contacts' names, addresses, company information, telephone numbers, birthdays, electronic mail addresses, and so on. You can attach an appointment, event banner, note, or task to any contact card.



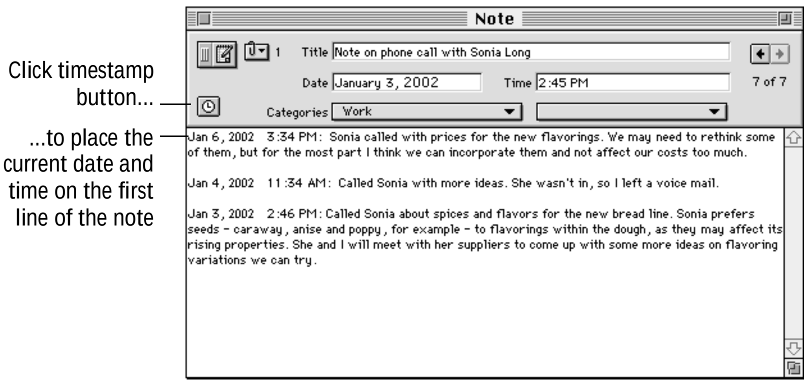
Example

To remind yourself to call a friend next week, click the paper clip pop-up menu and attach this new task to your friend's contact card. As the day you want to make the call approaches, an onscreen reminder will display.

You can copy a name and address to the Clipboard, then paste that information in another document, like an e-mail message or letter. You can also dial a telephone number through a modem connected to your computer.

Notes

Create notes during telephone calls, meetings, or whenever you need to create a memo for yourself. You can attach a note to any calendar item, contact, or task. You can also add the date and time to a note so you can keep an ongoing "log" of information, with the more recent items on top.

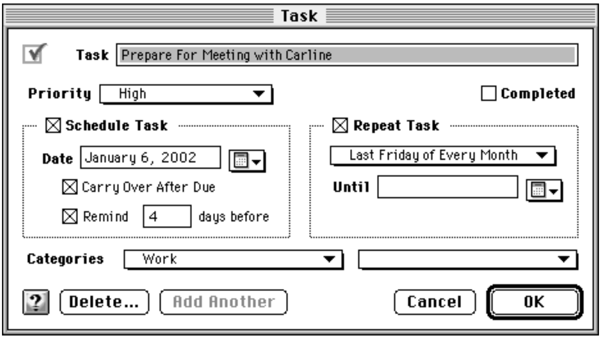


Example

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

Tasks

The task module keeps track of your tasks, or “to-do” items. You can give a task a title, a date of completion, a priority, and set the task to repeat over any duration you wish. Tasks appear in the calendars, and you can attach a task to any contact or note.



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 task for this, and set the task 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.

Starting Palm Desktop software

Palm Desktop software stores your information in one file. 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 you worked with. The name of the file appears in the title bar of each Palm Desktop window.

You do not need to save changes to your file—saving happens automatically.

To start Palm Desktop software for the first time, open the Palm folder, then double-click the Palm Desktop icon.

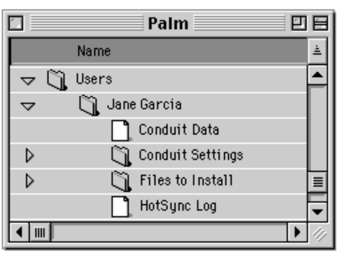
Using Palm Desktop software with your handheld

Palm Desktop software shares information with four of the built-in applications on your handheld: Address Book, Date Book, To Do List, and Memo Pad. 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 after a HotSync operation, see the chapters in this handbook that describe each module in Palm Desktop software.

When you installed Palm Desktop software, you entered a user name. This name is the connection between your handheld and your Macintosh:

- The name is assigned to your handheld the first time you perform a HotSync operation.
- A folder is created with the name in the Users folder inside the Palm folder. For example, if you entered “Jane Garcia” as your user name, a folder is created with that name and placed in the Users folder.



- A data file for Palm Desktop software is created in the new folder. The data file is named “User Data.”

When you perform a HotSync operation, the HotSync Manager reads the user name from the handheld, then synchronizes the data in the folder of the same name.

Creating and opening files

When you first install Palm Desktop software, it creates a new data file in the folder with the user name 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 the data file to synchronize with your handheld. Create other files only to backup data or to hold information for another user on the same Macintosh.

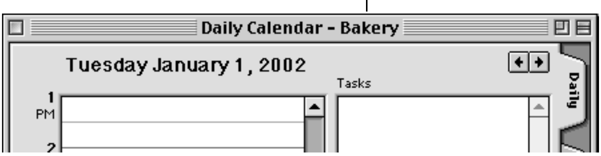
Opening existing files

Palm Desktop software automatically opens the last file you worked with. To open another file, choose Close File from the File menu, then choose Open from the File menu and double-click the file you want.

You can also double-click the specific file you want directly from the Finder.

The name of the 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

Although your changes are saved as you work, you can save a copy of a file to use as a backup. Choose Save a Copy from the File menu. In the Save a Copy dialog box, rename the copy if you want 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 only 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.

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 appointments, event banners, contacts, notes, or tasks to type, templates can help make your work easier.

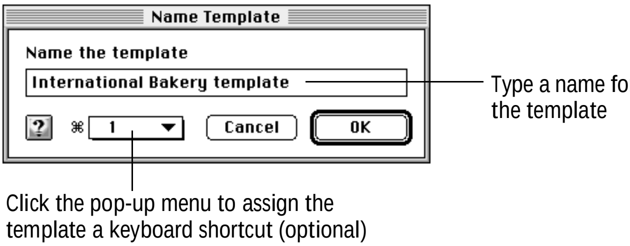
A template resembles a new item, except it already has some information typed. When you create a template, you choose what pre-typed information, and how much, is in it.

For example, if you have several new contacts to create, 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 contacts.

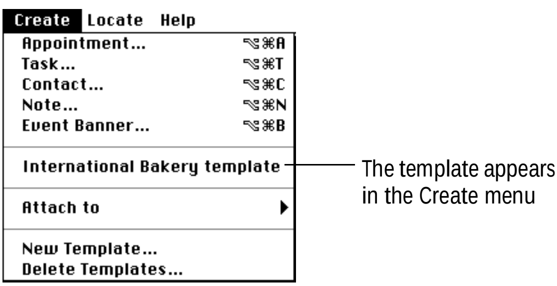
You can create a template either from an existing appointment, event banner, contact, note, or task—or from a new one. Once a template has been created, it appears in the Create menu, and you can use it to make new appointments, event banners, contacts, notes, and tasks. You then type only whatever remaining information the new item requires.

Creating templates from existing items

You can create templates from existing appointments, event banners, contacts, notes, or tasks. 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.



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 appointments, event banners, contacts, notes, or tasks. Choose Appointment, Task, Contact, Note, or Event Banner 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.

Removing templates

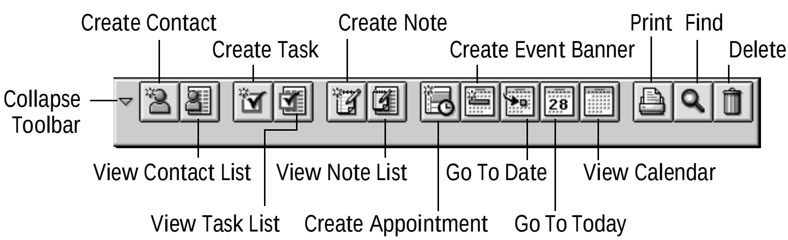
If you no longer need a template you can remove it. If you need to correct the information on a template, create a new one, then remove the old one.

To remove 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

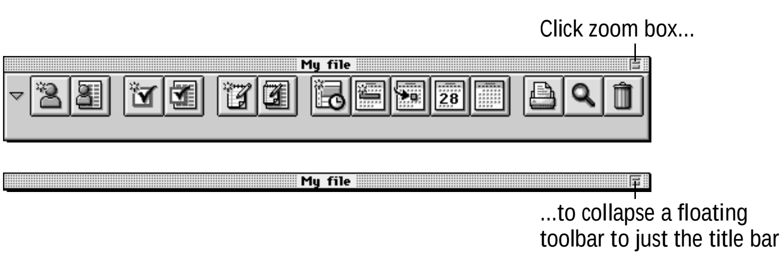
You can click the buttons on the toolbar instead of choosing menu commands to execute common actions.

By default, the toolbar displays each button's function as you float the pointer over the button. If you have a small monitor, you can collapse the toolbar, which hides button names. To do this, click the Collapse Toolbar button at the left side of the toolbar.



In the General preferences panel, you can choose to have the toolbar docked or floating. (You can also choose to have no toolbar.) If the toolbar is docked, it will remain locked at the top of the screen.

If you have set the toolbar to float, you can drag it anywhere on the screen. You can also click its zoom box to show only the title bar. Click the zoom box again to reveal the full toolbar.

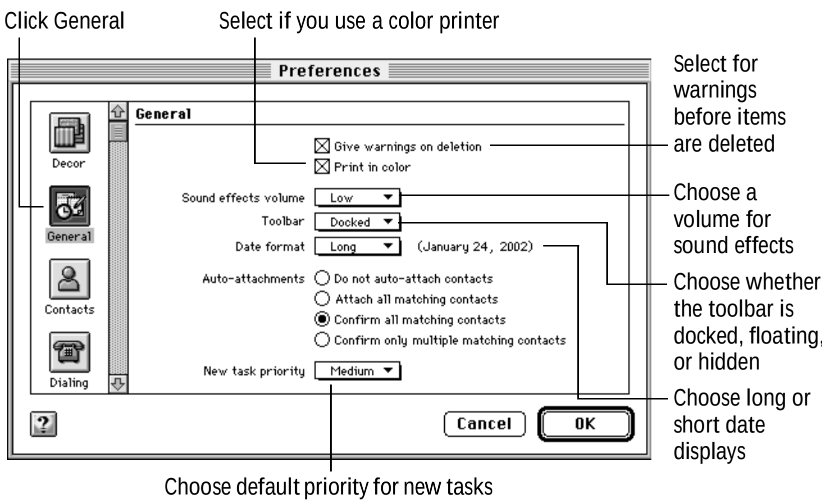


Setting preferences

To set preferences, choose Preferences from the Edit menu.

Setting general preferences

Use the General preferences panel to specify settings for deletion warnings, sound effects volume, the toolbar, date format, auto-attachments, and new task priority.



For information on setting auto-attachment preferences, see “Setting attachment preferences” in Chapter 9.

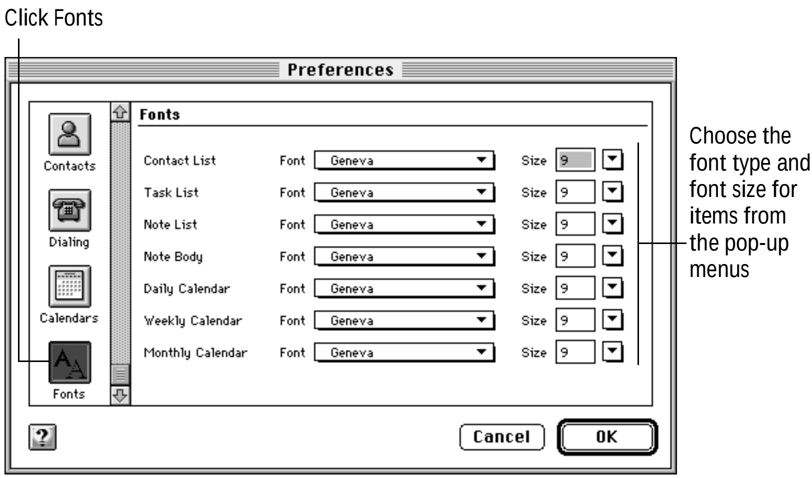
For more information

From the Help menu, choose “Search Index for” and type:

- `preferences, general`

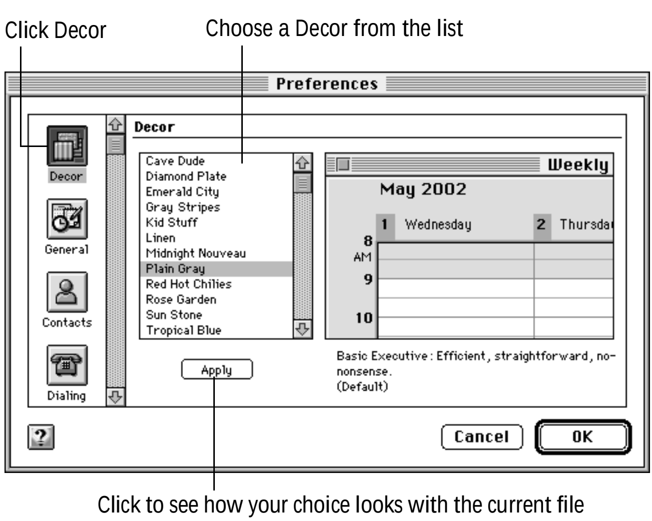
Setting font preferences

You can set different font types and font sizes for the contact list, task list, note list, note body, and the calendars. Choose Preferences from the Edit menu.



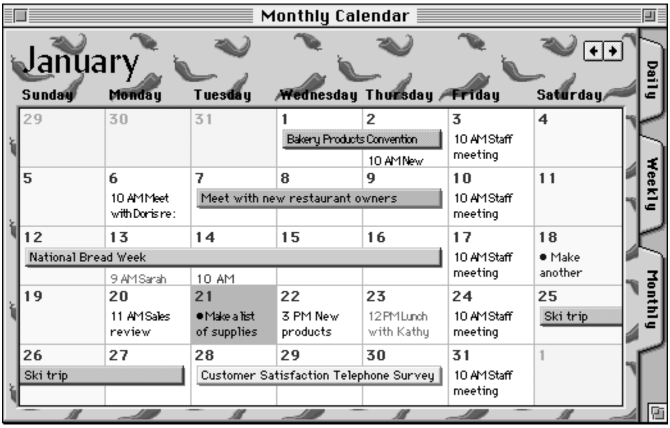
Setting Decor preferences

Decors are a collection of backgrounds that you can use to customize the onscreen appearance of your calendars, contact cards, note cards, and lists. To set a decor, choose Preferences from the Edit menu.



Click the Apply button to see how the Decor will look with your file. Click OK when you’re done.

Calendar with the Red Hot Chilies Decor



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

Adjusting memory

Your computer sets aside a certain amount of memory for each application. When you start Palm Desktop software, memory is reserved for its use. You can change the amount of memory reserved.

You may want to increase the amount of memory set aside if you run out of memory while using the application. Palm Desktop software uses the most memory when converting and importing files. Increasing the preferred memory size to 3000K should eliminate any memory problems if 3000K of free memory is available. If you use a Power Macintosh and have virtual memory off, Palm Desktop software requires more memory.

To change the memory allocation:

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

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

3. Choose Get Info from the File menu.

   You see the Palm Desktop Info window.

4. Double-click the Preferred Size box.

   You see the size highlighted in the box.

5. Type a number, such as 3000, to change the memory size.

6. 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 Macintosh memory, refer to the documentation that came with your Macintosh.

Chapter 2

Tutorial

With Palm™ Desktop software and your Palm Computing® handheld, you can bring order to your life by keeping track of names, addresses, telephone numbers, email addresses, appointments, notes, to-do lists, and much more wherever you go.

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.

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

You’re ready to go!

In this tutorial, you are the owner and manager of International Bakery, Ltd., a small specialty bakery that bakes goods with an international flavor. You sell these goods to delicatessens, cafés, and homes. You carry your Palm Computing handheld on calls to these customers and to suppliers. 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.

Now, let’s put the software to work!

Creating a contact

The moment you finish installing the software the telephone rings, and it's a new customer. She's heard all about your breads, and wants to carry them in her new deli. The first thing to do is create a contact card for her.

1. Click the Create Contact button on the toolbar.
   A new contact 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.

You can move from field to field by pressing Tab (or press Tab with the Shift key held down to go backwards). Press Enter or Return repeatedly to open and close successive sections. The first press expands the section for easy typing, and the second press collapses it for easy reading. A third press opens the next section. 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 contact card looks like the one here. 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 contact card yet.

Parentheses and hyphens are entered automatically.

Assigning a category

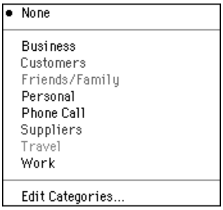
After you're done with the contact card information, you'll want to assign a category to this contact. Categories are an easy way to group the contacts, appointments, event banners, notes, and tasks. For example, you can assign the category "Office" to the contact listings for your coworkers, as well as appointments, notes, tasks, or event banners 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, while the secondary category is the one on the right. You can use primary and secondary categories however you choose.

You can assign a color to each category, making it easy to 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.

Note Only the primary category for an item is transferred to your handheld when you perform a HotSync® operation.

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



Note There are some additional categories in the Bakery file to help with the tutorial.

1. Click in the Other Information section of Susan Kenwood's contact 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.

If you like, fill in some of the other fields on Susan's contact card. When you're done, press Enter to collapse the open section. Then click the contact card's close box in the upper left corner to put it away.

Displaying list views

The contact card gives you a good way to view and change one person's information at a time. But you've got a lot of people in your Bakery file! To scan them, or jump quickly to another person's card, you will need to view your contacts as a list.

1. Click the View Contact List button  on the toolbar.
   You see the contacts listed in rows and columns.

2. Choose a contact in the list, and double-click it to open the contact card.
3. Click the contact card's close box in the upper left corner to put it away.
4. Click several contacts in the list as you hold down the Shift key.

5. Click a contact toward the top of the screen. All the previously selected contacts are now unselected. Press and hold the ⌘ key. Now click a contact five or six lines below the first one you clicked. The two contacts you clicked, plus all contacts in between, become selected.

6. To deselect all contacts, scroll down to the bottom of the list, where there are no contacts. Click there. All contacts are deselected.

There are three separate list view windows: one for contacts, one for notes, and one for tasks. 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 list view by selecting more than one item at a time.

Leave the contact list open—we'll use it in the next section.

Sorting contacts

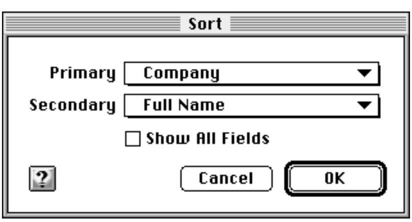
Right now, your contact list is sorted by name. Some operations may be easier if it were sorted by company.

1. Find the Company column in the Contact list. Scroll left or right if you need to.
2. Click the word Company at the top of the column. (Don't click the triangle next to it.)

This re-sorts the list so all contacts are sorted by company. Notice that the word Company is underlined. This indicates that it is the field by which the information is sorted.

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

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



Notice the dotted underline beneath the Full Name, indicating that it is the secondary sort column. There is also a solid underline beneath Company, showing that it is the primary sort column.

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

Viewing selected contacts

You want to take a quick look at your customers' contact cards. But there are many more contacts in your file than just those for your customers! You want to show the contact 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 contact list is not already open, click the View Contact List button on the toolbar.
2. Click the triangle 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 contacts again.

1. Click the triangle 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 contacts is visible again. If you prefer, you can also show the hidden contacts by clicking the Show All button in the upper right corner of the list window. (If you're already viewing all the contacts this button is not available.)

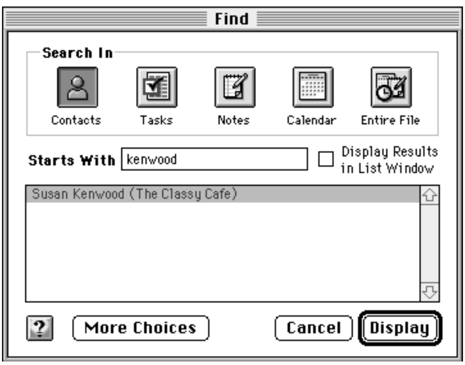
You can close any open windows by clicking the window's close box in the upper left corner.

Finding a contact

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

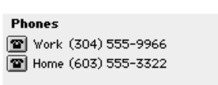
1. Click the Find button  on the toolbar.
2. Click the Contacts button  inside the Find dialog box. Make sure Display Results in List Window is deselected.
3. Type Kenwood in the text box.

   Her entry 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 contact card.

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



5. Close the contact card.

You can also find other information in a similar way, whether it's a task, note, or a calendar item such as an appointment or event banner. If you don't know where to look for the information, click Entire File to list every place the information appears.

Synchronizing contacts with the Address Book on your handheld

After you add or change contacts, 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 contact record 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 appointment

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 View Calendar button on the toolbar.

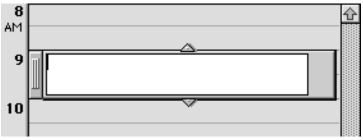
   If you don't see the Daily Calendar, click the Daily tab on the right side of the window.

2. Click the Go To Date button on the toolbar.
3. In the Go To Date dialog box, click the arrows either backward or forward until you see January 2002.
4. In the Go To Date dialog box, choose any day in January 2002 for the appointment, click it, then click OK.

   You'll see that date in the Daily Calendar view.

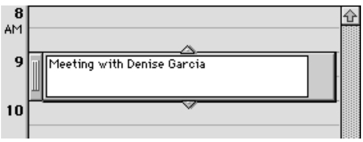
5. Scroll up or down until you see 9 AM in the appointments window, on the left side of the daily calendar view.
6. Move the pointer to the appointments window. The pointer becomes a crosshair.

7. Place the crosshair on the line representing 9 AM, then click and drag down until the box reaches 10.



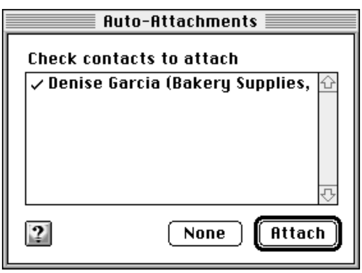
A one-hour appointment is created, from 9 AM until 10 AM.

8. Type `Meeting with Denise Garcia` inside the new appointment box.



9. Click outside of the appointment box to deselect it.

   The Auto-Attachments dialog box appears. There is a contact card for Denise Garcia, and you can attach it to this appointment.



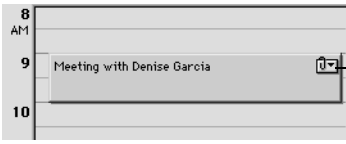
10. Click Attach.

    We'll discuss attachments in more detail later, in the "About attachments" section.

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

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

Click outside of the appointment to deselect it. It looks like this.



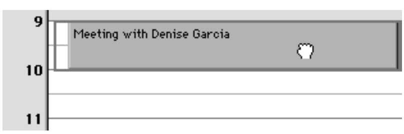
The paper clip pop-up menu shows that this appointment has an attachment.

Leave the Daily Calendar open for the next section.

Moving an appointment

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 appointment in your calendar.

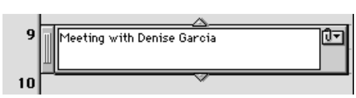
1. Move the pointer over the appointment.
2. Drag the appointment downward so the top of the appointment lines up with 10 AM.



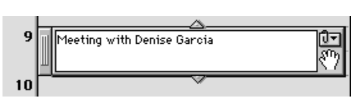
The appointment now starts at 10 AM and ends at 11 AM.

You can also change the time in the Appointment dialog box, if you prefer.

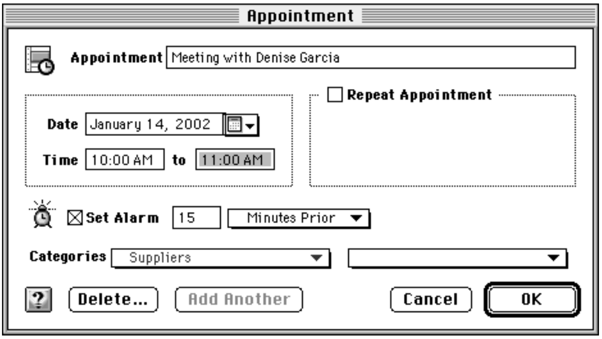
1. Click the appointment once, so it becomes selected.



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



3. When the Appointment 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.

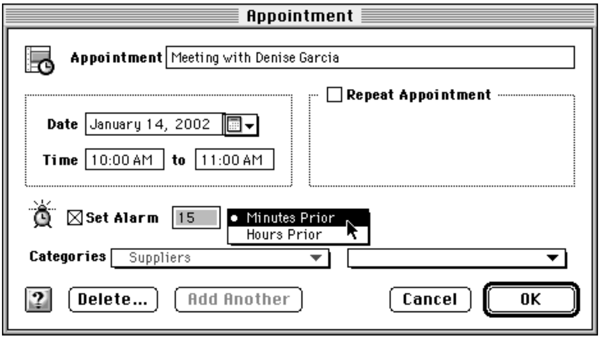
Don't click OK to close the dialog box just yet. The next thing we're going to do is confirm that we have set a reminder, or alarm, for this appointment.

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 appointment. An alarm is a dialog box that appears on your screen to remind you of an appointment. When you synchronize data with your handheld, the alarm will be set to go off on your handheld, too.

Alarms are set by default to go off 15 minutes prior to an appointment. You want to set this alarm to go off at the original time of the appointment (9 AM).

1. In the Appointment dialog box, make sure the Set Alarm checkbox is selected.



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

A dialog box will appear at 9 AM (according to your computer's system clock) like this:

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

Although reminders are very handy, you do not need to have a reminder set if you do not want one. In the Appointment dialog box, deselect the Set Alarm checkbox. You will not get a reminder for that appointment.

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 Create Appointment button  on the toolbar to create a new appointment.
3. Make the appointment for today's actual date.
4. Check the current time, then set the start time of the appointment 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.

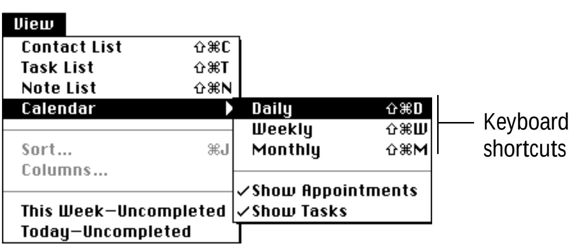
When you're through experimenting with reminders, you can close any open windows if you like.

Showing the three calendar views

The Calendar has three views: daily, weekly, and monthly. First, let's try the three ways to choose one of these calendar views. Then we'll examine the differences among them.

To switch among the three calendar views:

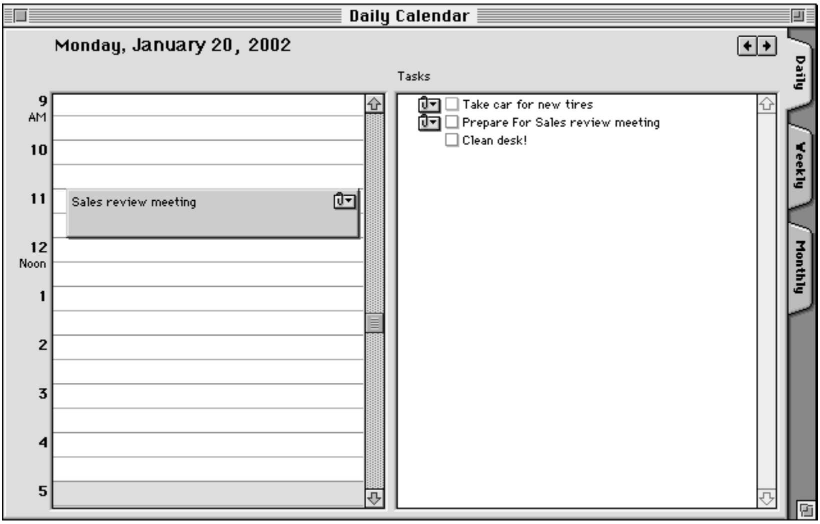
1. Click the View Calendar button  on the toolbar repeatedly, until you have seen each calendar view.
2. Click the tabs on the right side of the calendar until you have seen each calendar view.
3. Choose Calendar from the View menu, and then choose one of the three calendar views from the submenu. (You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



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

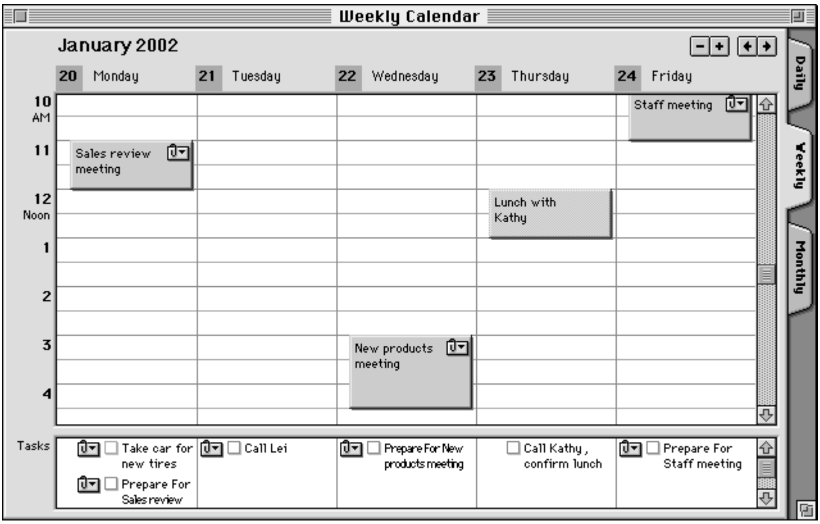
- The daily view shows one day’s appointments, tasks, and event banners. On the left, you see appointments and any event banners. The window scrolls to reflect the time of day. On the right, you see the day’s task (to-do) list.

Daily Calendar



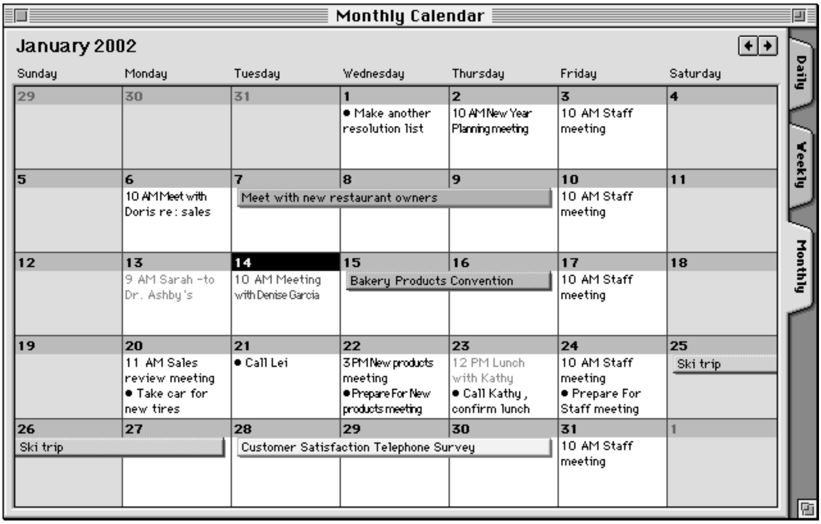
- The weekly view shows appointments, event banners, and tasks for a number of days you choose, from one to seven. Appointments and event banners are listed on top, while tasks are listed beneath each day. You can click the + and - buttons to change the number of days displayed—from one day to as many as seven.

Weekly Calendar



- The monthly view shows the current month's appointments, event banners, and tasks.

Monthly Calendar

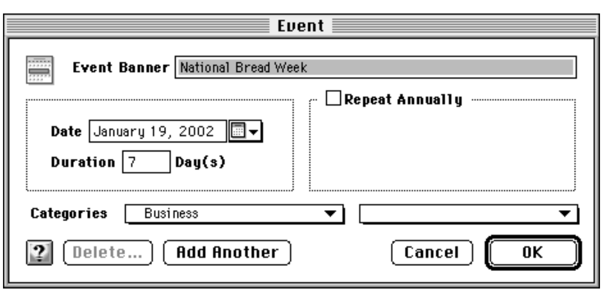


Leave one of the calendars onscreen for the next section.

Creating an event banner

National Bread Week is coming up! You must note this on your calendar with an event banner.

1. Go to the monthly calendar view for January 2002.
2. Click the Create Event Banner button  on the toolbar.
3. For the event banner's name, type `National Bread Week`.



4. Type `1/19/02` in the Date box. (This is the banner's start date.)

5. Type 7 in the Duration box so the event banner spans an entire week.
6. Choose Business from the primary Categories pop-up menu on the left.
7. Click OK.

   An event banner appears on the calendar.

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

8. Click the event banner and drag it to another week.

   The event banner now spans that week.

9. Double-click the banner. When the Event Banner dialog box opens, change the duration to five days. Click OK. Notice that the event banner has been shortened by two days.
10. Double-click the event banner again, and change the duration back to seven days. Click OK. The banner once again spans the entire week.

Close the calendar window if you like.

Synchronizing appointments with the Date Book on your handheld

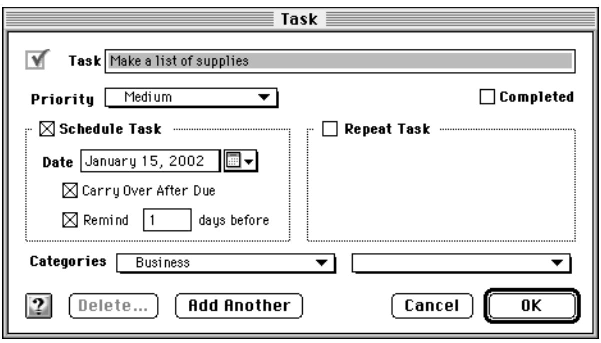
A HotSync operation exchanges new appointments between Palm Desktop software and your handheld and updates all changes to appointments made in either location. For example, the appointment you made for 10 AM with Denise Garcia would appear on your handheld in the Date Book application after a HotSync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

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.

1. Click the Create Task button  on the toolbar.
2. In the Task text box, type `Make a list of supplies`.



3. Leave the Priority at Medium.
4. Make sure the Schedule Task checkbox is selected.
5. Type `1/15/02` in the Date field.
6. Leave Carry Over After Due selected.
7. Select the Remind checkbox and type `1` in the days before box that appears.

   This reminder occurs only on Palm Desktop software; the handheld doesn’t support alarms on to do list items.
8. Choose Business from the primary (left) Categories pop-up menu.
9. Click OK.

You now have a task, with a reminder that appears in the calendars the day before the task is due. After you click OK, the task list appears so you can see your other tasks, as well.

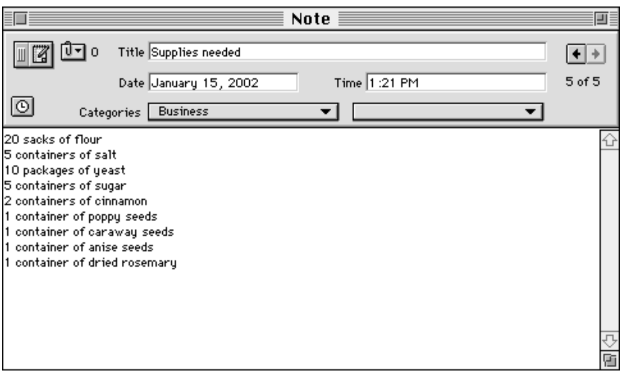
A HotSync operation also exchanges new tasks between Palm Desktop software and your handheld and updates any changes to tasks or to do list items made in either location.

Close the task list by clicking the close box in the upper left corner of the window.

Creating a note

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

1. Click the Create Note button  on the toolbar.
2. Type a title for the note: `Supplies needed`.

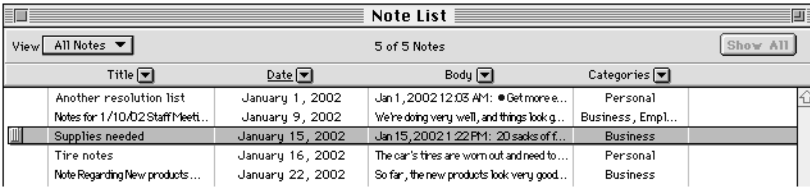


3. Type `1/15/02` for the date. You can leave the time as is.
4. Choose Business from the primary (left) Categories pop-up menu.
5. Press Return and type the supplies you need:

```
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 dried rosemary
```

6. Close the Note window. This saves the note and puts it away.
   If you want to refer to this note or change it, click the View Note

List button on the toolbar and double-click the note from the list.



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

After you're through, close the note list. If the task list is open, close it as well.

About attachments

With attachments, you can connect any appointment, event banner, contact, note, or task to another, so related information is always available. Create attachments by clicking an icon called the gripper and dragging it with your pointer.

The gripper is a gray handle with vertical bars that appears on appointments, event banners, contact cards, and note cards. It also appears next to contacts, notes, and tasks when you select them in a contact list, note list, or task list. Note that the gripper can look slightly different, and be different sizes, depending on where it's being used.

You can attach an appointment, event banner, contact, note, or task to any other by dragging the gripper from the first item to the second.

For example, if you have created an appointment—and you also have a contact card for the person you have the appointment with—you can attach the appointment to the contact by dragging the appointment (by its gripper) to the contact. You could also do the reverse: drag the contact to the appointment. 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.

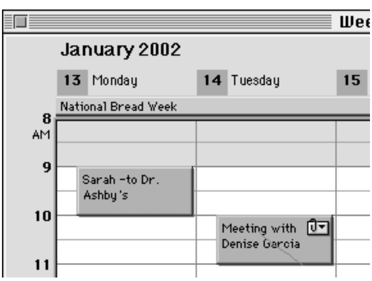
Creating attachments

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 placed this appointment on the calendar. When you did that, you were prompted to attach Denise Garcia’s contact card and the new appointment.

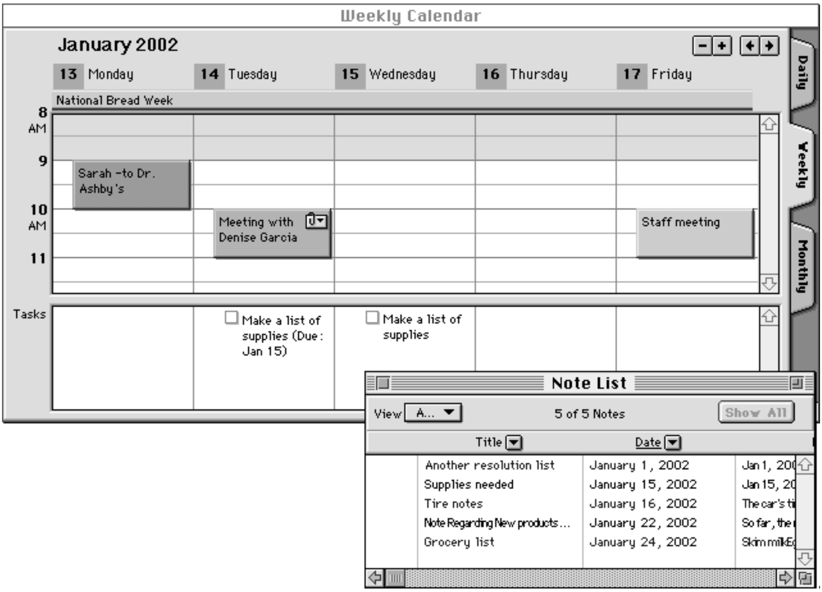
Now let’s attach the note you just created—the one listing the supplies you need—with the appointment you have with Denise Garcia.

1. Click the View Calendar button  on the toolbar until you see the Weekly Calendar.
2. Find the appointment that says Meeting with Denise Garcia. It’s in January 2002, in the morning. (The day it appears on your calendar can vary.)



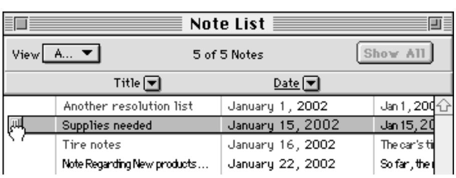
3. Click the View Note List button  on the toolbar.

4. Shrink the size of the Note List window and the Weekly Calendar window so you can see the note list and the appointment at the same time.

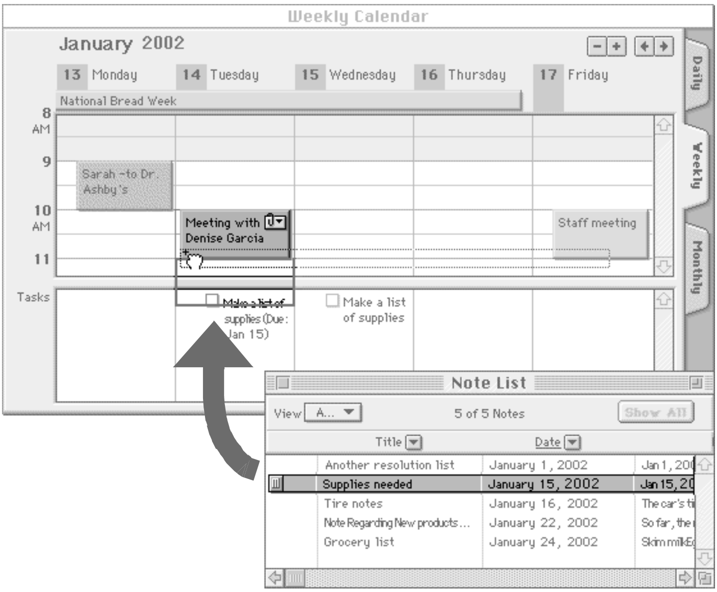


5. Scroll through the note list until you see Supplies needed. Click this line once so it is selected.

6. Move the pointer over the gripper icon so the pointer turns into a hand.



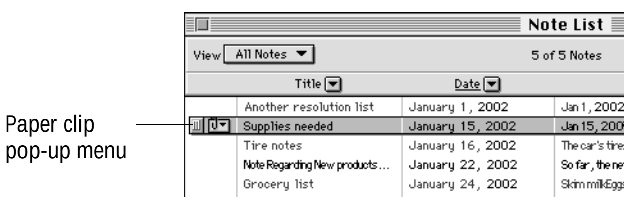
7. Drag the gripper from the Supplies needed note to the appointment that says Meeting with Denise Garcia. As you drag, you'll see a small cross next to the closed hand, and a box appear around the appointment.



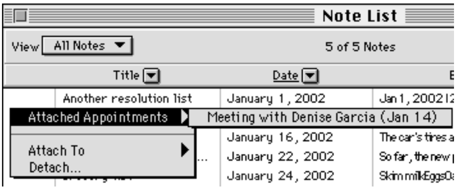
8. The cross turns into a paper clip once Denise Garcia's appointment is selected. Release the mouse button.

   The note is now attached to the appointment.

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

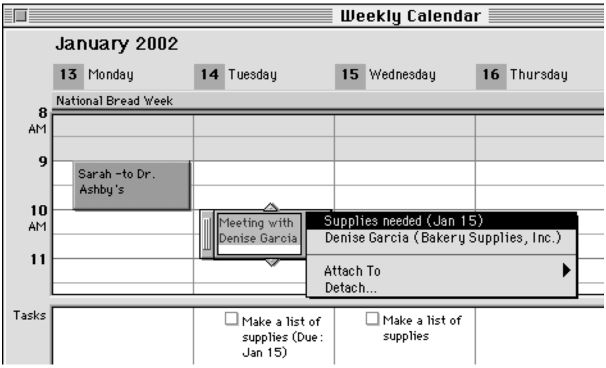


10. Click and hold the paper clip pop-up menu to reveal the attachments menu. Choose the appointment title.



The calendar appears, showing you the appointment.

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



Notice the appointment now has two attachments: the note you just attached, and Denise Garcia's contact card, which was automatically attached when you created the appointment. You can jump to either the note or contact card if you like.

You can create as many different attachments as you like to cross-reference whatever appointments, event banners, contacts, notes, or tasks 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 Edit menu to open the dialog box, then click General.)

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

Using the Attach Existing Item feature

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

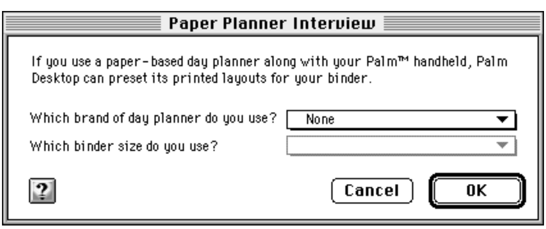
1. Click to select any appointment or event banner—or click any contact, note, or task from the contact list, note list, or task list.
2. Choose Attach To from the Create menu, and then choose Existing Item.
3. Follow the instructions in the Attach Existing Item dialog box. Click the gripper in the dialog 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.

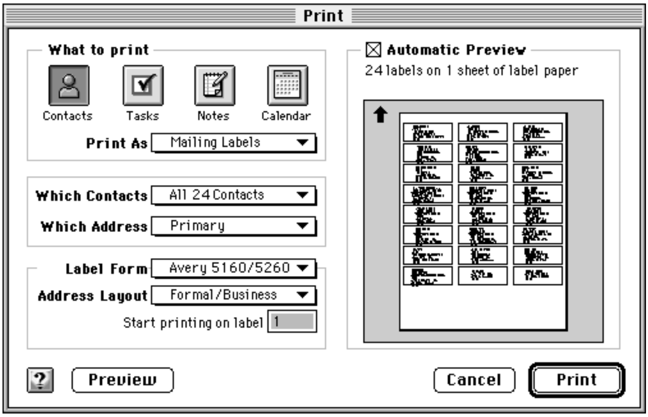
1. Click the View Contact List button  on the toolbar.
2. With the contact list showing, click the Print button  on the toolbar.
3. The first time you print, you see a box asking if you use a day planner. To set up your day planner, choose your brand of day planner in the upper pop-up menu. In the lower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

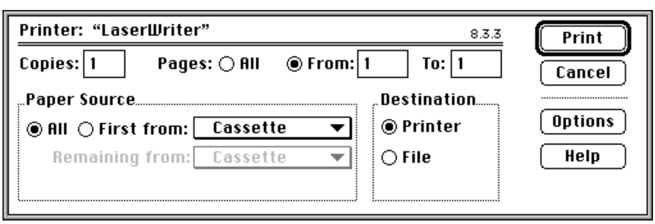


6. Choose Mailing Labels from the Print As pop-up menu.

   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.

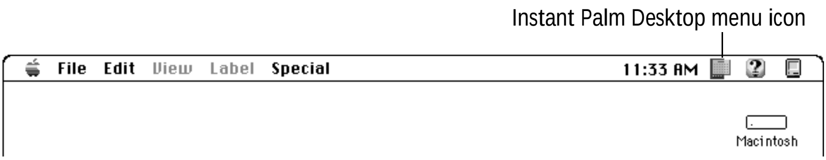


9. Make sure your printer is connected and switched on, and then click Print.

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

After you install Palm Desktop software, the Instant Palm™ Desktop menu appears near the right corner of the screen, and is available at all times, whether or not Palm Desktop software is open.



If you don't see the Instant Palm Desktop menu icon near the right corner of your screen, you must reinstall Palm Desktop software.

You can use the Instant Palm Desktop menu to open Palm Desktop software, to open HotSync Manager, to find contacts, and to view today's appointments, event banners, and tasks. You can also use it to create new appointments, contacts, event banners, notes, and tasks.

To create an item from the Instant Palm Desktop menu, do the following:

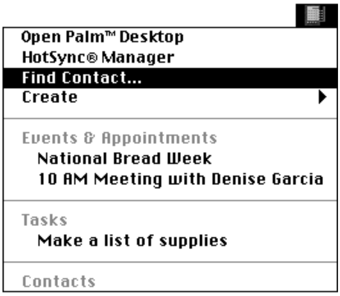
1. If Palm Desktop software is currently open, choose Quit from the File menu.

   You see the Instant Palm Desktop icon in the upper right corner of the screen.

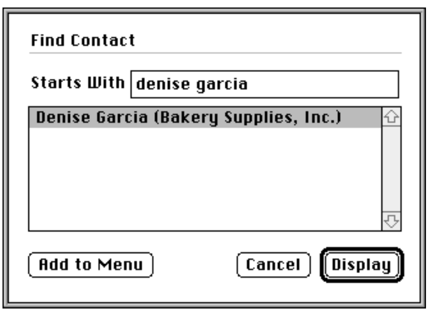
2. Choose an option from the menu. (The choices on your menu may look different from those below.)

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

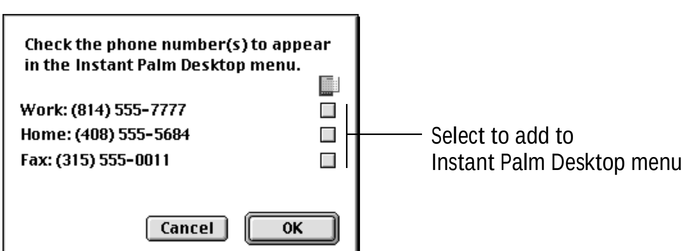
1. Choose Find Contact from the Instant Palm Desktop menu.



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

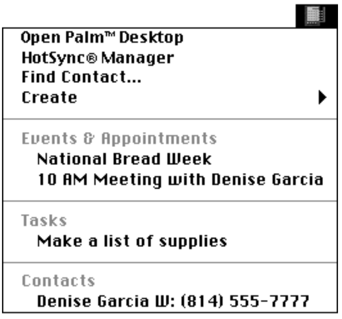


3. When her name appears in the list, click it once to select it.
4. Click the Add to Menu button.
5. Select a checkbox for each telephone number you want included in the Instant Palm Desktop menu. (To remove telephone numbers from the Instant Palm Desktop menu, you deselect these checkboxes.)

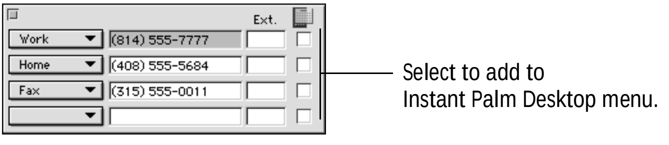


6. Click OK.

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



You can also add contact telephone numbers to the Instant Palm Desktop menu by viewing the contact 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.



Backing up your data

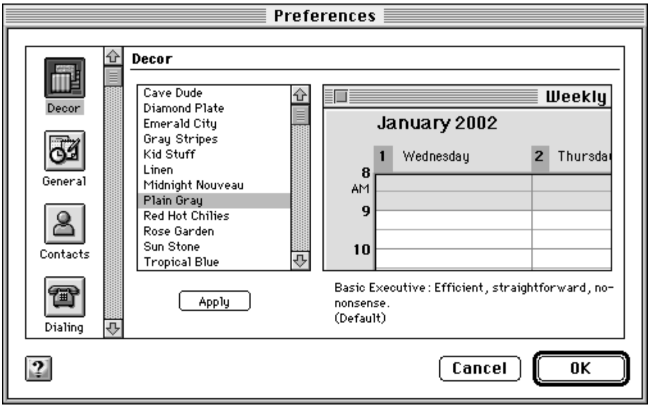
Your data is valuable. Always back it up regularly so you'll be protected in the event of equipment failure, inadvertent file deletion, or other mishap.

To back up your Palm Desktop software data, make a copy of your data file. Choose Save as Copy from the File menu, then type a new name such as “Copy of User Data 3 Jan” in the Save as Copy dialog box.

Applying Decors

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

1. Open a 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 Edit menu.
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 the many 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 for this handbook. 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 Macintosh Balloon Help, as well as an extensive onscreen help system which includes a full index, Tips section, bookmarks, and more. It's available onscreen whenever you need it—just choose an option from the Help or  menus. You can also click the  in any dialog box to go directly to a relevant help topic.

Chapter 3

Working with Contacts

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

About contacts

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, World Wide Web home page addresses, comments, and more. Contacts 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.

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

Viewing contacts

You can view your contacts by:

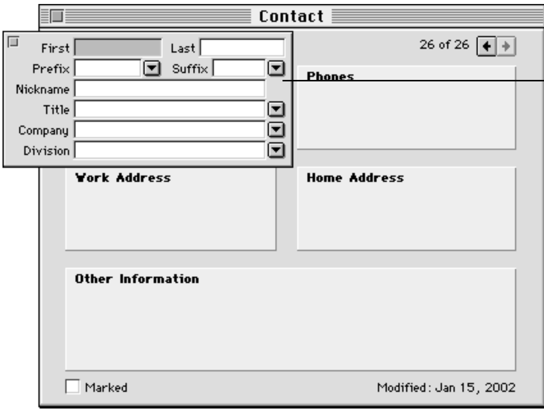
- Contact card, for viewing one contact at a time. You can also change existing contact information when viewing the contact card
- Contact list, for viewing contact information many records at one time

To see a list of your contacts, choose Contact List from the View menu, or click the View Contact List button on the toolbar.

For more information on list views, see Chapter 7.

Adding and changing contacts

To create a contact card, choose Contact from the Create menu, or click the Create Contact button on the toolbar. You see a new contact 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.



Type contact information in a contact card

For more information

From the Help menu, choose “Search Index for” and type:

- `contacts`

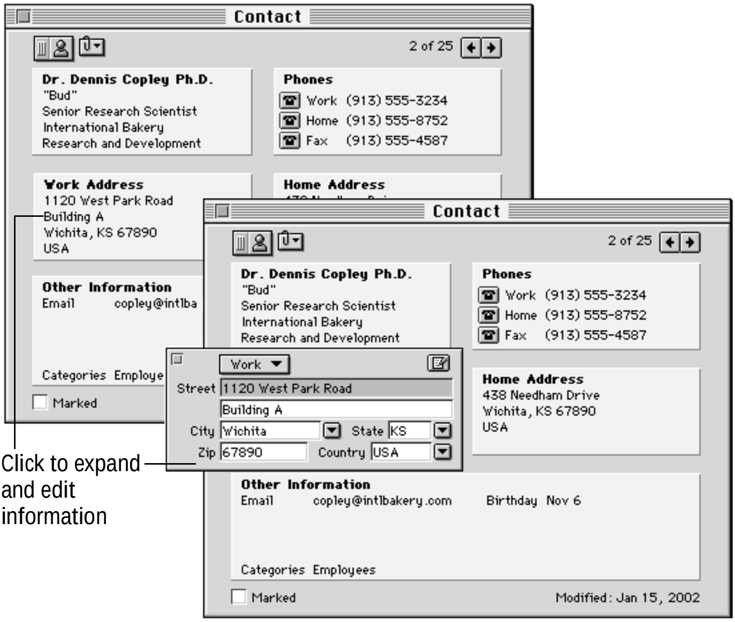
Changing contact information

You can change existing contact information by locating the contact in the contact list and double-clicking on the contact you want to change.

Double-click a contact in the list to edit it

You can also use the Find feature to locate the contact you want. For more information, see Chapter 8.

The contact 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.



Click to expand and edit information

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

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

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 Contacts preferences dialog box). See "Transferring contacts to your handheld" later in this chapter for information about how the fields in the Other Information section transfer to your handheld.

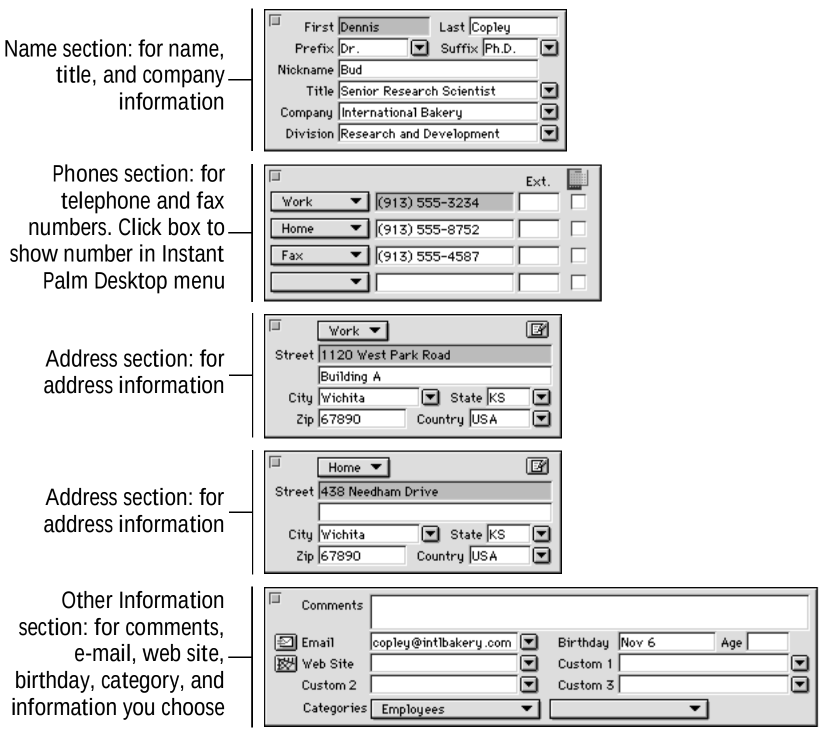
For more information

From the Help menu, choose "Search Index for" and type:

- `custom fields`

The Comments field is an excellent place to note brief information that is unique to a particular contact. 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 note that is attached to the contact. For more information, see Chapter 4 and Chapter 9.

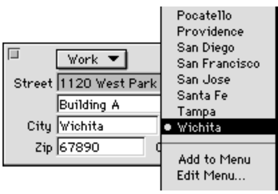
When you expand the Phones section, you'll see checkboxes to the right of each telephone number. Select one of these checkboxes, and that telephone number appears in the Instant Palm™ Desktop menu so you can access the number whether or not Palm Desktop software is running. Deselect the checkbox to remove the telephone number from that menu. For more information, see "Working with contacts" in Chapter 13.



Using and changing entry lists

Some contact card fields provide a pop-up list 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 an entry list, whatever you type is added to the pop-up menu. (You can turn this feature off. See “Setting contact preferences” in this chapter.)



Choose an entry from the pop-up menu

For more information

From the Help menu, choose “Search Index for” and type:

- `entry lists`

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.

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 Contacts preferences dialog. For the Email and Custom fields, set this option by clicking the triangle next to the field and choosing Field Options.

Formatting telephone numbers

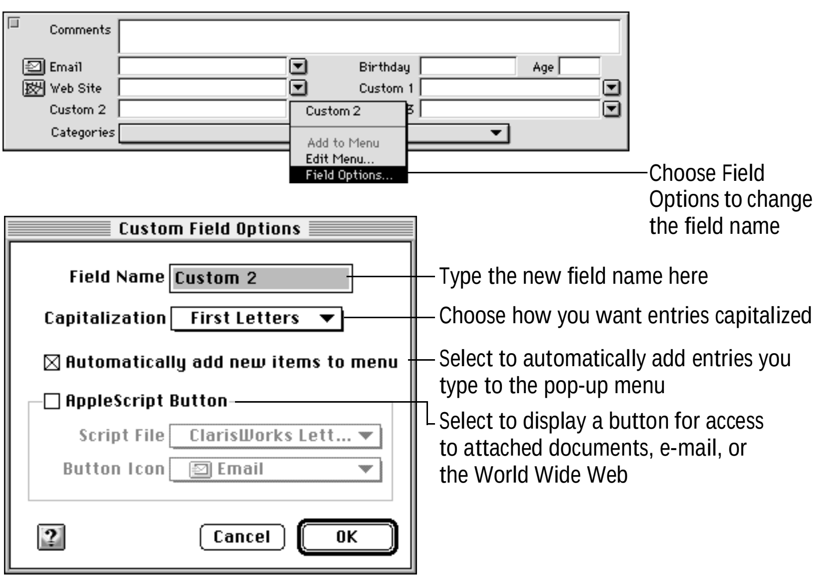
Telephone numbers are automatically formatted. After you type the numbers and press Tab or click outside the field, the numbers are formatted with the telephone number format you have specified in the Contacts preferences dialog box.

You can specify the default area code in the Contacts 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 Contacts preferences.

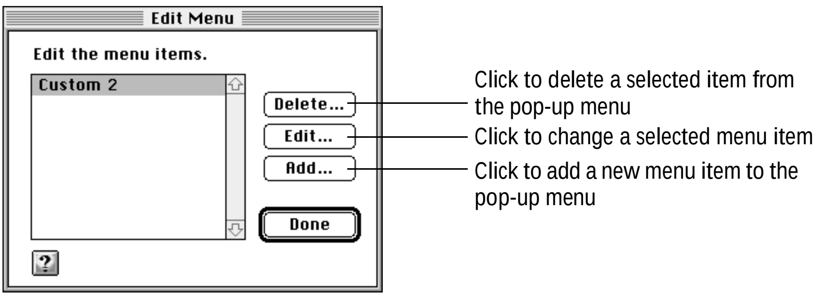
Setting custom field options

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



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, then place it in the Scripts folder, in the Palm folder. After that's done, select the AppleScript Button checkbox 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.

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 World Wide Web pages automatically by using the Email and Web Site fields together with Claris Emailer and a Web browser.

Note You must have Claris Emailer to use the Email button. You must have Netscape Navigator or Microsoft Internet Explorer to use the Web Site button.

Type a contact's electronic 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 Claris Emailer, creates a new e-mail message, and inserts the contact's e-mail address for you.
- The Web Site button launches Navigator or Internet Explorer, inserts the contact's Web site address, and takes you to the contact's Web site.

Using Birthday Minder

You can keep track of birthdays using Contacts. In the Other Information section of the contact card, type the contact's birthday in the Birthday field. When you press Tab or click out of the field, an event banner is created for that person on his or her birthday.

You can type just the birth month and day if you prefer. If you type the birth year as well, the contact'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.

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

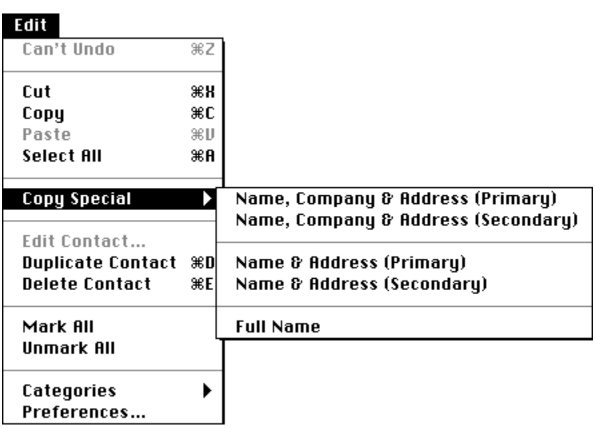
For more information

From the Help menu, choose "Search Index for" and type:

- `birthdays`

Copying contact information

You can copy information from the contact card and paste it into a note, task, or another application. Choose Copy Special from the Edit menu to copy the contact'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 contact 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 contacts to your handheld

Contacts 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 desktop Contact list, and synchronizes changes made in either the handheld or the Macintosh.

The following list shows the details of the data transfer for contacts between your Macintosh and your handheld:

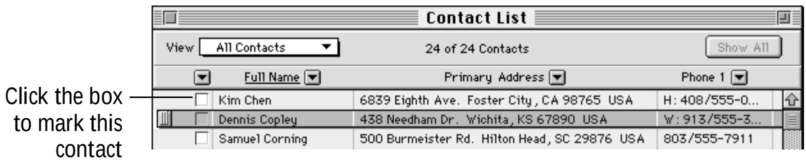
Palm Desktop software items	Transfer to Address Book on handheld as
Last name	Last name
First name	First name
Prefix, Suffix, Nickname	Do not transfer to the handheld
Title	Title
Company	Company
Division	Does not transfer to the handheld
Phone 1 and extension	Work phone with extension in the same field (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	Other phone with extension in the same field (Fourth phone field)

Palm Desktop software items	Transfer to Address Book on handheld as
Phone number formats	As entered
Email	E-mail (Fifth phone field)
Comments	Address Book note, comment section
Street, City, State, Zip, Country	Street, City, State, Zip, Country
Secondary address	Address Book note, secondary address section
Contact categories	Category The first category you assign to a contact 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
Attachments to contacts, such as notes, appointments, or tasks	Relationships do not transfer to the handheld The contact and each attached item transfer to the handheld to their corresponding applications. The relationship between the items does not transfer.
File attachments to contacts, such as letters	Do not transfer to the handheld

Marking contacts for printing

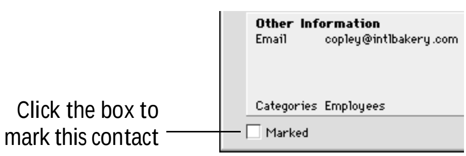
In some cases you may want to print only some of the contacts in your list. For example, you might want to address envelopes only to your coworkers, or print labels only for your friends and family.

You can mark contacts in the contact list. Choose Contact List from the View menu, or click the View Contact List button on the toolbar. Within the contact list, select the checkbox to the left of each contact you want to mark.



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

You can also mark contacts individually by clicking the box in the corner of the contact card.



To print the marked contacts, choose Print from the File menu. From “Which Contacts” pop-up menu in the Print dialog box, choose “Marked contacts.” For more information on printing contacts, see Chapter 11.

You can also mark contacts for sorting and filtering the contact list. For more information, see Chapter 7.

Attaching a letter to a contact

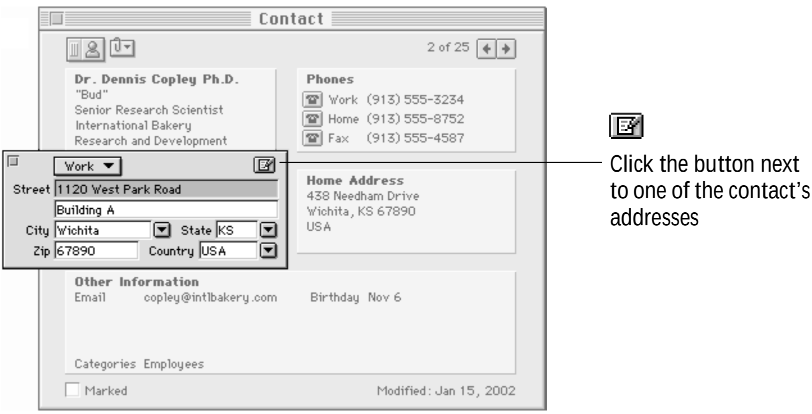
A contact’s name and address can be automatically copied into a ClarisWorks, AppleWorks, or MacWrite Pro template letter.

Note You must have ClarisWorks 4.0 or greater, or MacWrite Pro 1.5v3 installed on your system. Also, the Letter Templates folder must be in the Palm folder.

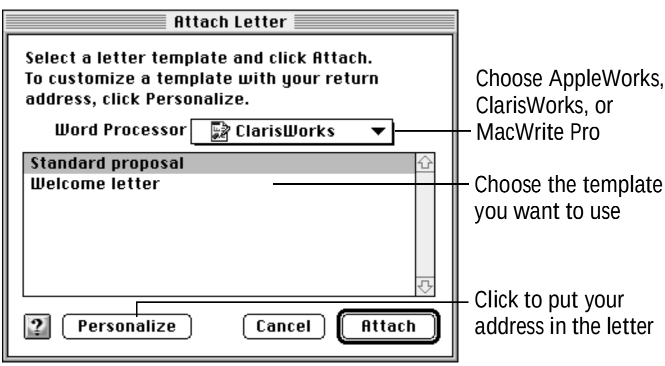
Note The letter you create using this process is not transferred to your handheld in a HotSync operation.

Adding an address to a letter template

Open a contact card, click the address you want to use for your letter, then click the 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 launches, the letter template opens, the contact'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 contact is created. Click the contact's paper clip pop-up menu and select the letter to open it in your word processor, edit the address as necessary, and print it.

Deleting contacts

You can delete a contact at any time. To delete a contact, open the contact card you want to delete, or select it from the contact list. Then choose Delete Contact from the Edit menu, or click the Delete button on the toolbar.

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

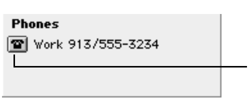
For more information about archiving items you delete from your handheld, see "Archiving data you delete from your handheld" in Chapter 12.

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.

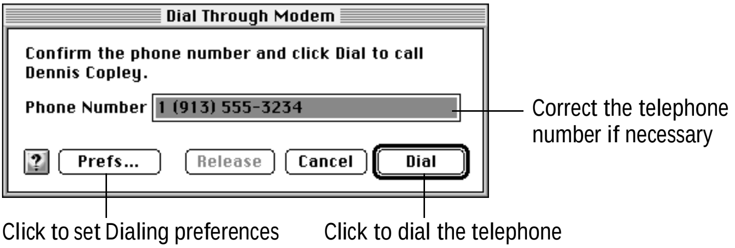
To dial a contact's telephone number, make sure your modem is connected to your computer and its power is switched on. Your modem should be connected to the same line as the telephone you want to use.

On a contact card, click the telephone button next to the telephone number you want to dial.

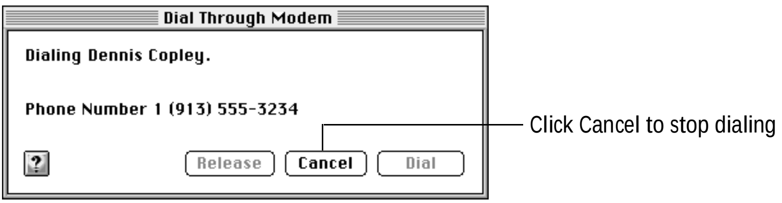


Click to dial the telephone number

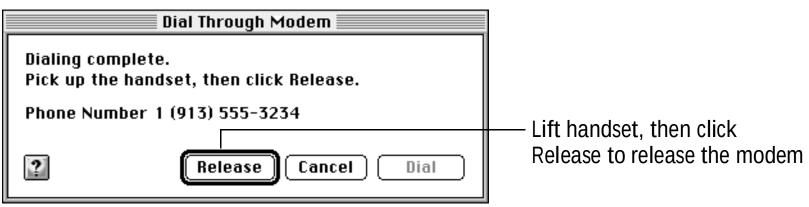
If you have "Confirm number before dialing" selected in Dialing preferences, a dialog box opens asking you to confirm that you want to dial the telephone number. Otherwise, the telephone dials immediately.



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



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



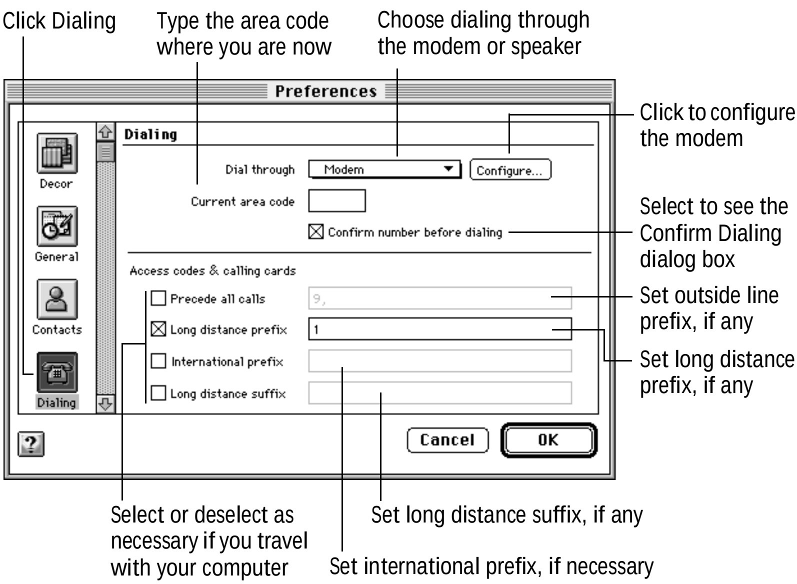
You can specify the local area code in Dialing preferences so an area code is added when necessary. This is especially useful if you travel with your computer.

Dialing international numbers

In the Phones section of the contact 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 Edit menu and clicking the Dialing button.



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.

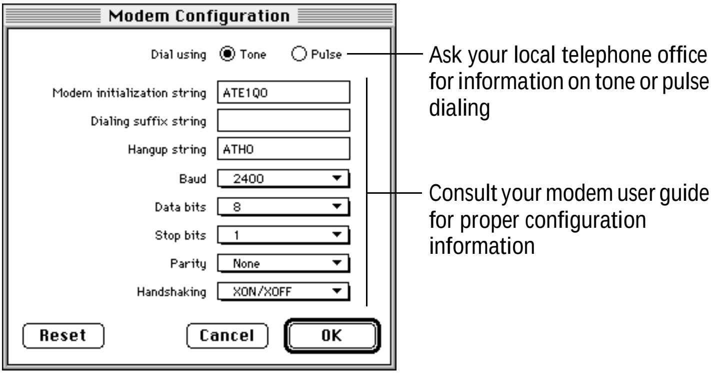
For more information

From the Help menu, choose "Search Index for" and type:

- `preferences, dialing`

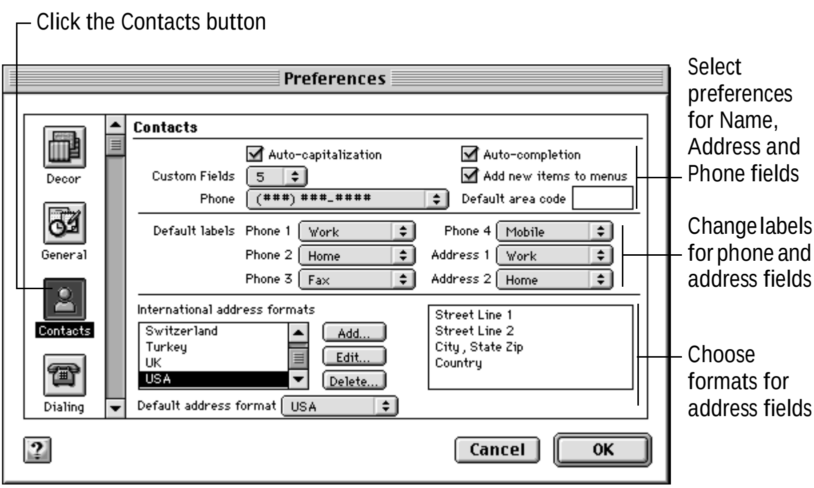
Configuring your modem for dialing

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.

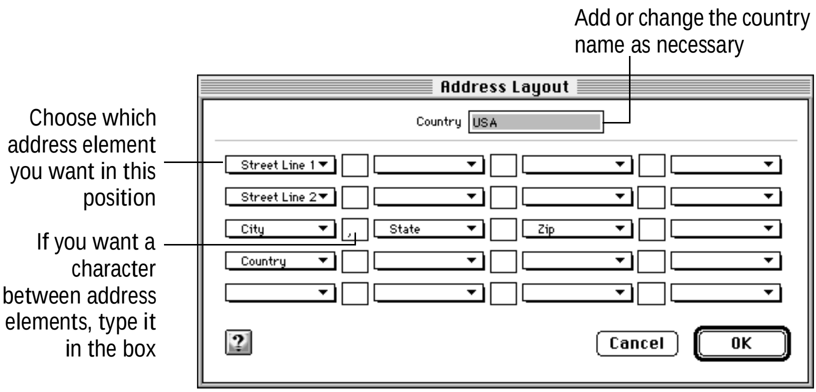


Setting contact preferences

You can set preferences for contact cards by choosing Preferences from the Edit menu and clicking the Contacts 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.



For more information

From the Help menu, choose “Search Index for” and type:

- `preferences, contacts`

Chapter 4

Working with Notes

This chapter explains the basics of working with notes.

About notes

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

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

Creating notes

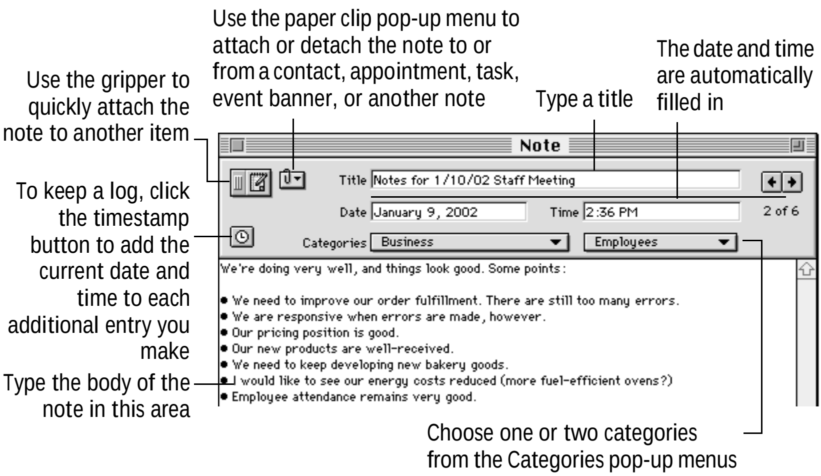
Create a note when you want to store information that needs to be tracked, followed up on, or kept in a central location, such as:

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

Since a note can contain up to 64K of information, notes are better for long entries than the Comments field in a contact card. The capacity of the Comments field is 256 characters.

Memos on your handheld are limited to 4K bytes of information; therefore, notes transferred from Palm™ Desktop software are truncated to 4K.

Choose Create Note from the Create menu or click the Create Note button on the toolbar. The note card appears.



For more information

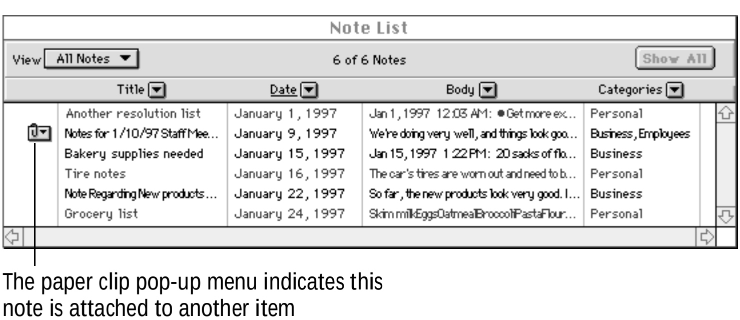
From the Help menu, choose "Search Index for" and type:

- notes

Viewing notes

To see notes in a list, choose Note List from the View menu or click the View Note List button on the toolbar. You can view notes one at a time by double-clicking a selected note in the note list.

Notes in list view



For more information about working with notes in list view, for example, sorting them, see Chapter 7.

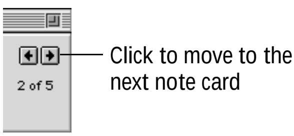
For more information

From the Help menu, choose "Search Index for" and type:

- `viewing lists`

Browsing notes

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



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

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

Selecting notes

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

To select	Do this
All notes	Choose Select All from the Edit menu
One note	Click the note
Many notes	Press Shift and click the notes
A group of notes	Click the first note and then Command-click the last note

Changing notes

After you create a note you can change:

- The title, date, and time fields and in the body of the note
- The categories assigned to the note
- Any attachments

Whenever you change a note, the Modified field is updated. The Modified field is preset to be hidden and is available only in the note 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 notes.

For information about changing attachments to notes, see Chapter 9.

Attaching notes

To quickly attach a note, position the pointer on the gripper of the note. Drag the note to a contact, task, appointment, event banner, or another note. You can also make an attachment by dragging the note’s gripper to the Create Contact, Create Task, Create Note, Create Appointment, or Create Event Banner button on the toolbar. Another way to attach notes is to use the Attach Existing Item palette. For more information see, “Attaching existing items to other existing items” in Chapter 9.

For more information

From the Help menu, choose “Search Index for” and type:

- `notes, attaching`

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

Deleting notes

You can delete a note card by:

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

You can delete a selected note in the note list by:

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

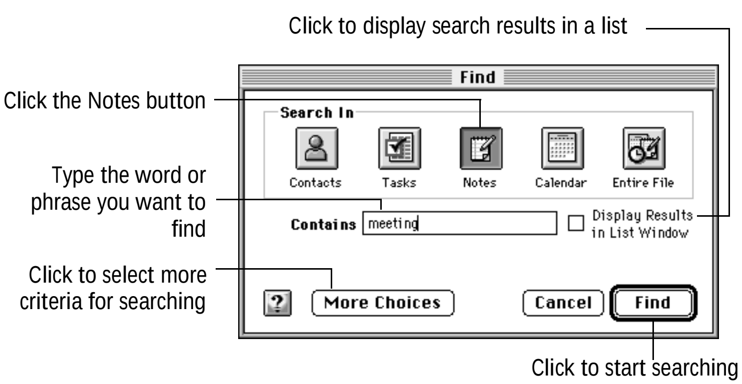
The next time you perform a HotSync operation, the note is deleted from your handheld. Deleted notes can't be recovered.

For more information about archiving items you delete from your handheld, see "Archiving data you delete from your handheld" in Chapter 12.

Finding notes

You can search through your notes for a word or phrase in any field in a note. 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 note.

Transferring notes to your handheld

Notes 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 note module on Palm Desktop software, and synchronizes changes made on either the handheld or Macintosh.

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

Palm Desktop software items	Transfer to Memo Pad on handheld as
Note title	The first line of the memo The first line of a memo created on your handheld becomes the Note title on Palm Desktop software.
Note date and time	Do not transfer to the handheld When a memo is created on the handheld, the note date and time from Palm Desktop software are filled with the time of the transfer to the Macintosh.
Note categories	Category The first category you assign to a note is transferred to the handheld. The second category does not transfer. See “Transferring categories to your handheld” in Chapter 8.
Note body	Memo body The first 4K bytes of the note appear in the memo on the handheld. **Note** If you make changes to this truncated memo, the changed text (truncated) will overwrite the original (untruncated) note after a HotSync operation.
Attachments to notes, such as contacts or tasks	Relationship does not transfer The note and each item attached to it transfer to the handheld. The relationship between the items does not transfer.

Palm Desktop software items	Transfer to Memo Pad on handheld as
File attachments to notes	Do not transfer to the handheld

Chapter 5

Working with Calendars

This chapter explains the basics of working with the calendars.

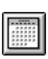
About the calendars

Calendars give you a way of seeing all the things you have scheduled to do. You can easily move around in the calendars to see different days, weeks, or months. In the calendars you can:

- Add, change, and move appointments
- Change appointment durations
- Add, change, and move event banners
- Add, change, and move tasks
- Set reminders
- Mark completed tasks
- Create attachments

Calendar appointments, event banners, and reminders appear in the Date Book application on your handheld after you perform a HotSync® operation.

Viewing the calendars



The Calendar view can display a daily, weekly, and monthly calendar. You can quickly switch between the different calendar views by clicking one of the tabs at the right edge of the calendar window or repeatedly clicking the View Calendar button on the toolbar.

There are many keyboard shortcuts to help you navigate the calendars.

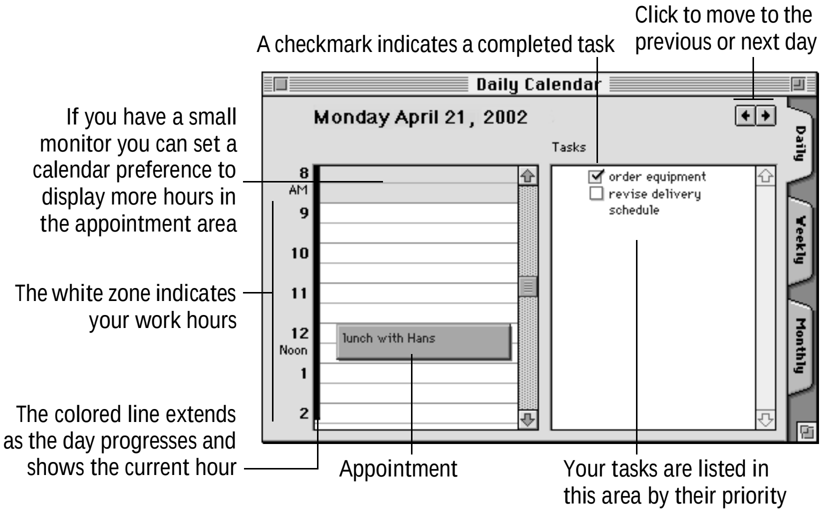
For more information

From the Help menu, choose “Search Index for” and type:

- `keyboard shortcuts`

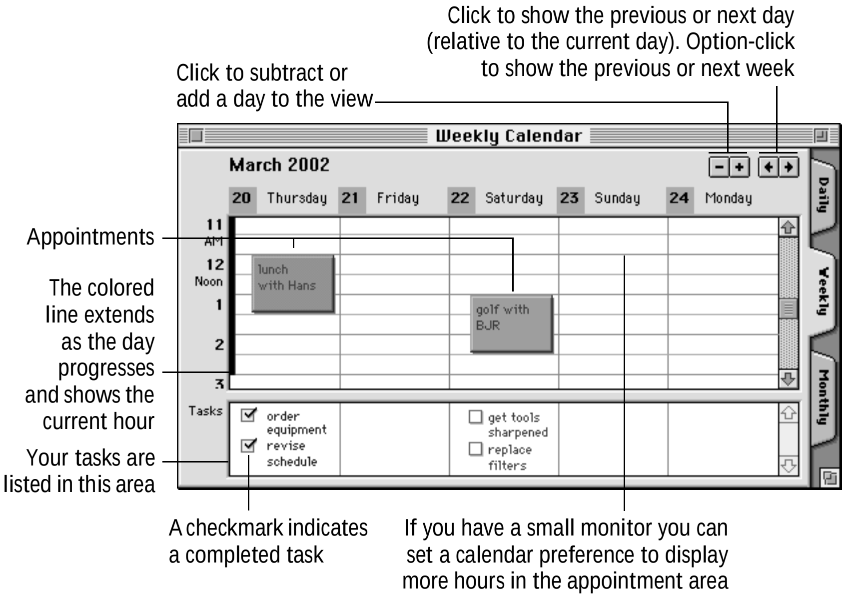
Viewing the Daily Calendar

To view the calendar one day at a time, click the Daily tab in the calendar window or choose Calendar from the View menu and then choose Daily.



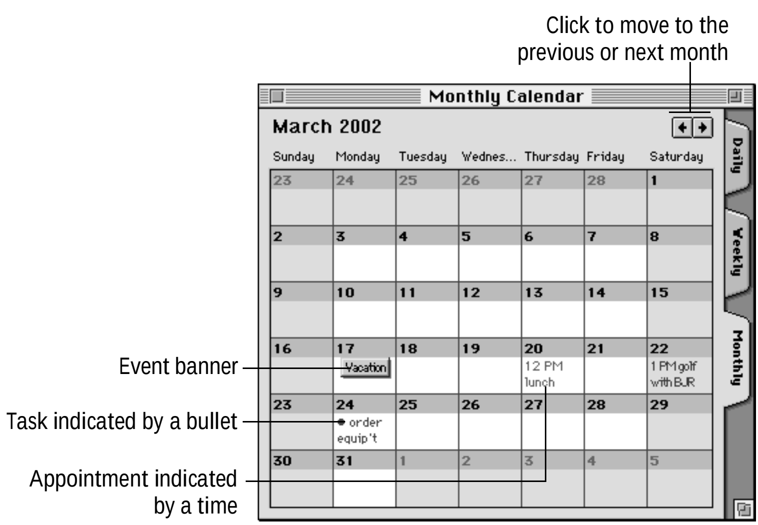
Viewing the Weekly Calendar

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



Viewing the Monthly Calendar

To view the calendar a month at a time, click the Monthly tab in the calendar window or choose Calendar from the View menu and then choose Monthly.



Showing or hiding items in the Monthly Calendar

In the Monthly Calendar, there is not a lot of space to show the text of all the calendar items. You may prefer to hide appointments or tasks, so that you can easily see the other type of item. You can also hide both appointments and tasks, so that just event banners are displayed. Appointments, tasks, and event banners display by default.

To hide appointments, choose Calendar from the View menu and then deselect Show Appointments. To hide tasks, choose Calendar from the View menu and then deselect Show Tasks.

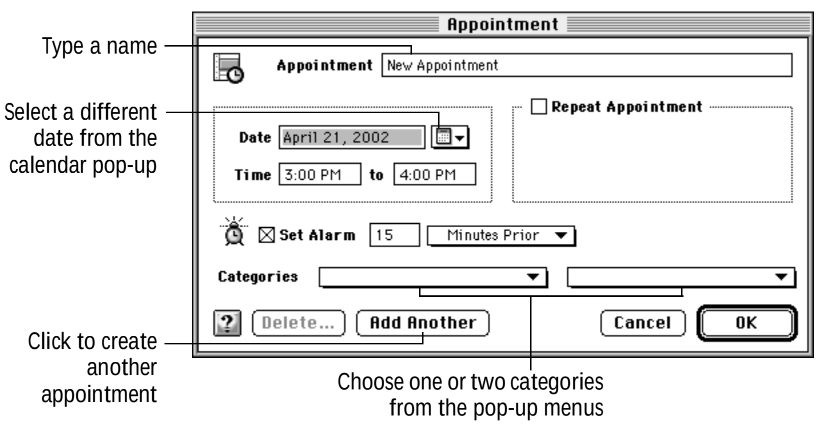
These settings do not affect how your appointments are transferred to your handheld during a HotSync operation. All items transferred will be visible on the handheld.

Adding information to the calendars

You can create appointments, tasks, and event banners in any of the calendars.

Creating appointments

A single appointment is one that occurs once, such as an interview or a product demonstration. In the daily and weekly calendars, you can create an appointment by double-clicking the date and time slot you want. You can also choose Appointment from the Create menu or click the Create Appointment button on the toolbar.



In the Monthly Calendar, if you double-click within a day (below the day number), you are prompted to create a task, appointment, or event banner. Click the appointment button in the dialog box and then click OK.

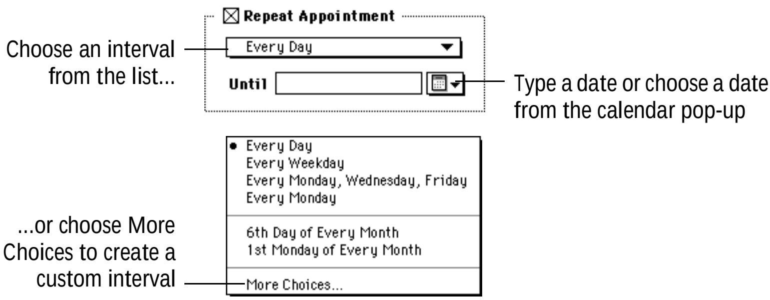
For more information

From the Help menu, choose "Search Index for" and type:

- `appointments`

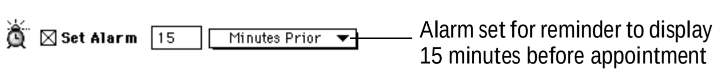
Creating repeating appointments

A repeating appointment is one that occurs regularly, such as a weekly staff meeting. In the Appointment dialog box, select Repeat Appointment. Then choose the interval you want from the pop-up menu and type the date of the last appointment in the Until box or choose a date from the calendar pop-up.



Setting alarms

When you create a new appointment, an alarm is turned on by default. Since the calendars are synchronized to your computer's clock, be sure it is set to the correct time. In the Appointment dialog box, select Set Alarm and then change the alarm reminder to the interval you want.

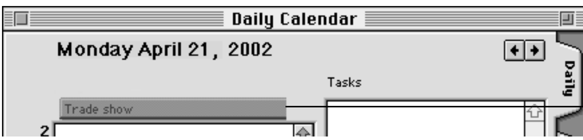


When you transfer appointments with alarms to your handheld, the alarm is also set on your handheld.

Creating event banners

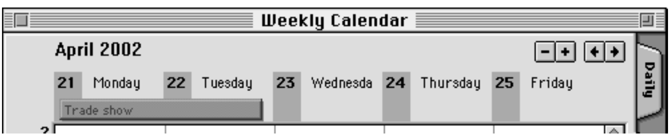
An event banner is an item that can span one or more days (up to a year). Vacations, holidays, and conferences are examples of event banners. An event banner is indicated by a box at the top of a day or days in the daily and weekly calendars and by labels in the Monthly Calendar. You can have multiple banners per day. When there are two or more banners, they are listed in the order they were created.

Note Text files that you can use to import holiday information are available in the Palm folder.



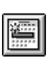
The event banner has an unfinished edge to indicate a continuing event

Event banner in Daily Calendar

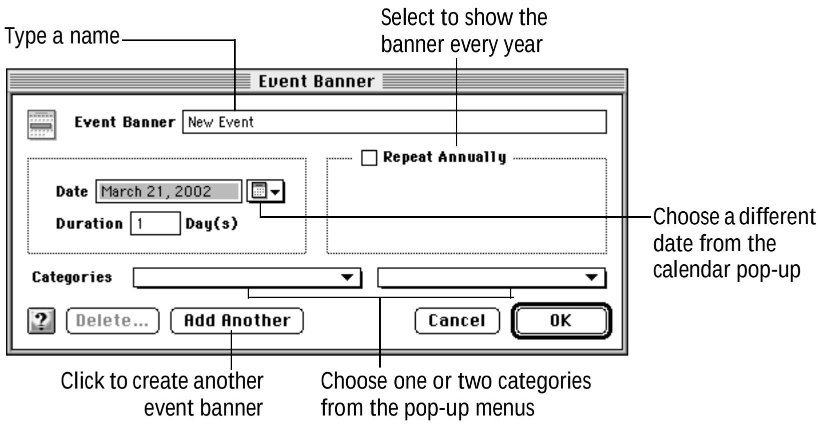


Event banner in Weekly Calendar

Event banner in Monthly Calendar



You can create an event banner by double-clicking at the top of a day in the daily or weekly calendar. You can also choose Event Banner from the Create menu or click the Create Event Banner button on the toolbar.



In the Monthly Calendar, if you double-click within a day (below the day number), a dialog opens asking you whether you want to create a task, appointment, or event banner. Click the event banner button in the dialog box and then click OK.

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

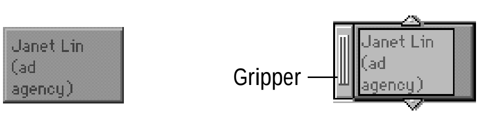
For more information

From the Help menu, choose "Search Index for" and type:

- `event banners`

Editing appointments

Before you delete, duplicate, or move an appointment, you must select it.



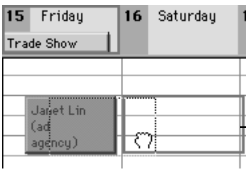
Unselected appointment

Selected appointment

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

Changing an appointment's date

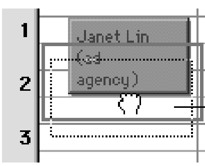
You can change the date of an appointment by either dragging the appointment to another date on the weekly or monthly calendar or by double-clicking the appointment to display the Appointment dialog box. If the appointment is selected, use the gripper to drag it to another date.



Drag the appointment to another date

Changing an appointment's time or duration

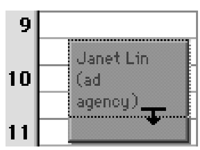
You can change the time of an appointment by dragging the appointment to another time slot.



Drag the appointment to another time slot

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

Drag the arrow down to lengthen the appointment



Drag the arrow up to shorten the appointment

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

Changing a repeating appointment's interval

To change the frequency of a repeating appointment, double-click the appointment near the edge of the box. In the Change Repeating Item dialog box, choose which appointment you want to change and click

OK. Then, in the Appointment dialog box, choose a new interval from the Repeat Appointment pop-up menu.

Renaming appointments

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

Deleting appointments

You can delete an appointment by selecting it and then:

- Pressing the Delete key

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

To delete a repeating appointment, select it and then choose Delete Appointment. In the Change Repeating Item dialog box, choose which appointment you want to delete and click OK.

The next time you perform a HotSync operation, this appointment is 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.

Editing event banners

Before you delete, duplicate, or move an event banner, you must select it.

Unselected event banner

Selected event banner

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

Changing event banners

To change the duration or text of an event banner, double-click it to display the Event Banner dialog box. Or select the event banner and then choose Edit Event from the Edit menu.

Moving event banners

Select the event banner and drag it to a new date on the weekly or monthly calendar. You see an outline of the event banner as you drag it.

Deleting event banners

You can delete an event banner by selecting it and then:

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

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

Transferring calendar items to your handheld

Appointments, reminders, and event banners are transferred to the Date Book application on your handheld when you perform a HotSync operation. This operation also moves new Date Book items from the handheld into the calendar module in Palm Desktop software, and synchronizes all changes made in either the handheld or the Macintosh.

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

Palm Desktop software items	Transfer to Date Book on handheld as
Appointment text	Event text
Appointment start, end, and alarm times	Start, end, and alarm times
Appointment categories	Do not transfer to the handheld
Repeating appointments that occur on a single day of the week (for example, art class on Tuesday night through the summer) or month (civic club meeting on the third Tuesday of each month)	Repeating events by day of the week or month **Note** Untimed events that repeat by day, week, or month created on the handheld do not transfer to Palm Desktop software. Annually repeating untimed events do transfer, however.

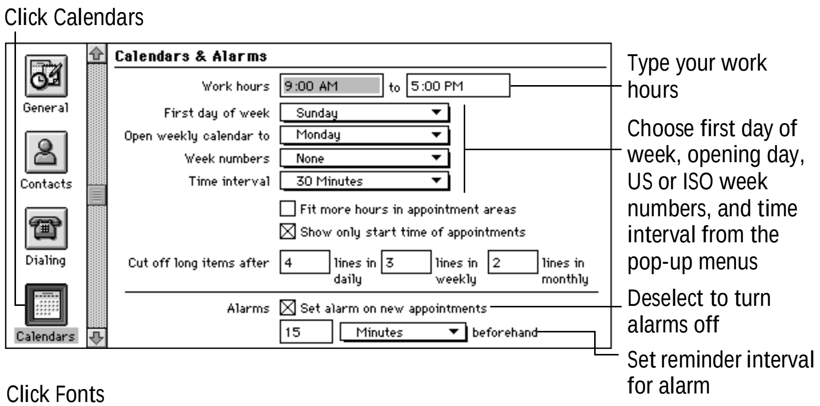
Palm Desktop software items	Transfer to Date Book on handheld as
Appointments that repeat on more than one day of the month (for example, math tutorial at the elementary school on the second Tuesday and Wednesday of each month)	Separate repeating appointments for each day indicated The example would transfer to the handheld as a series of repeating appointments on the second Tuesday and a separate series of appointments on the second Wednesday of each month. The relationship between the Tuesday events and the Wednesday events is not maintained.
Remind checkbox	Alarm checkbox
Event banners	Daily untimed events Event banners become a single or a series of daily untimed events on the handheld. Daily untimed events on the handheld are transferred to Palm Desktop software as event banners.
Alarm settings for event banners	Alarms for untimed events The handheld alarm rings at midnight at the beginning of the first day of the event for which the alarm is set. **Note** Alarms for untimed events set on the handheld do not transfer to Palm Desktop software, unless the untimed event is set to repeat.
Alarm settings for yearly events	Alarms for untimed events The handheld alarm rings at midnight at the beginning of the day for which the alarm is set.

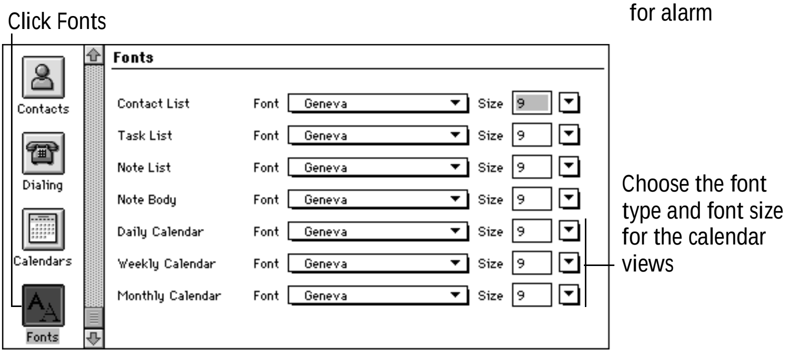
Palm Desktop software items	Transfer to Date Book on handheld as
Attachments to appointments, such as contacts or tasks	Relationships do not transfer to the handheld The appointment and each attached item transfer to the handheld to their corresponding applications. The relationship between the items does not transfer.
File attachments to appointments	Do not transfer to the handheld

Setting calendar and alarm preferences

You can set up how you want your calendar and alarms to display. You can also select a font type and size for calendar entries.

Choose Preferences from the Edit menu.





For more information

From the Help menu, choose "Search Index for" and type:

- `preferences, calendar`

Chapter 6

Working with Tasks

This chapter explains the basics of working with tasks and keeping track of the things you need to do.

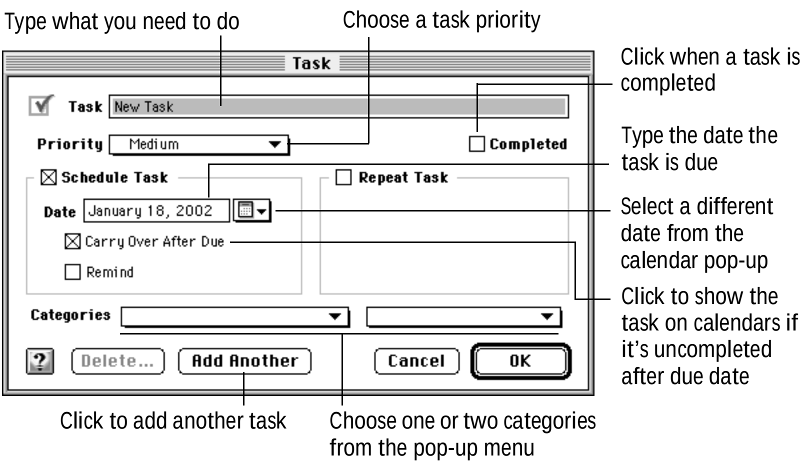
About tasks

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

Tasks appear in the To Do List application on your handheld after a HotSync® operation. Tasks do not appear in the Date Book application on the handheld.

Adding tasks

To add a new task, choose Task from the Create menu or click the Create Task button on the toolbar.



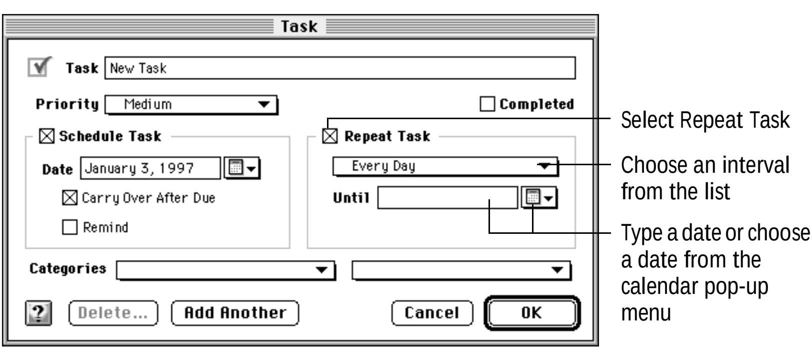
For more information

From the Help menu, choose "Search Index for" and type:

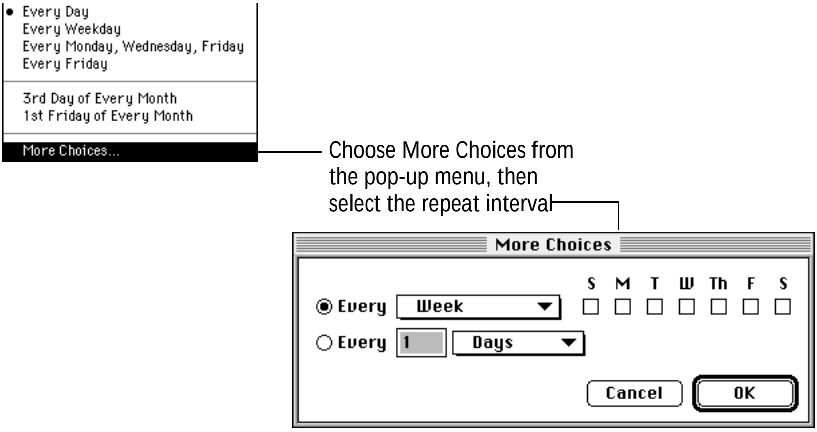
- tasks

Adding repeating tasks

Some tasks happen on a regular basis. To repeat a task on another day or another week, select Repeat Task, then choose a repeat interval from the pop-up menu that appears.

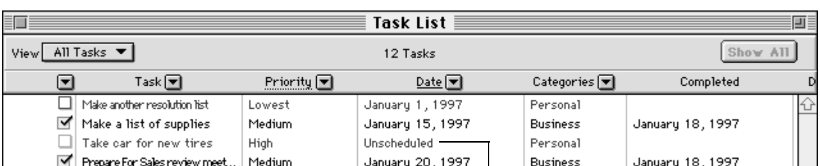


If the repeat interval that you need is not available in the pop-up menu, choose More Choices from the pop-up menu, then enter the appropriate information.



Adding unscheduled tasks

Tasks don't need to have a specific due date. You can create unscheduled tasks whenever you think of something you need to do, but you don't know when you will be able to do it. Make a task unscheduled by deselecting the Schedule Task checkbox in the Task dialog box. The task will not appear in any of the calendar views and will have no reminder, but it will appear in the task list.



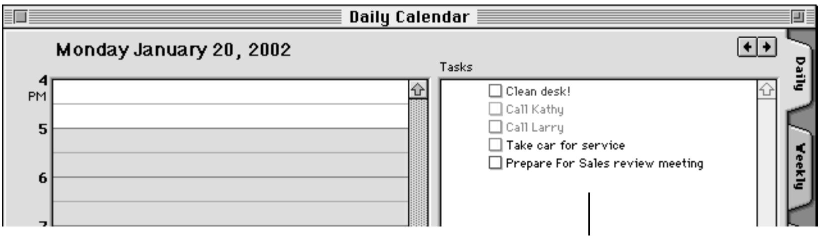
Unscheduled task

Both scheduled and unscheduled tasks appear in your to-do list, but unscheduled tasks don't clutter the daily, weekly, and monthly calendars. When you are ready to set a date for an unscheduled task, drag it from the task list to a day in the daily or weekly calendars. The task now has a due date, and appears in the calendars.

Adding tasks from the calendars

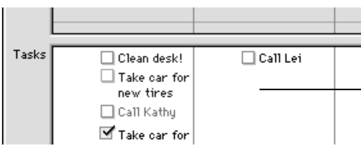
You can add tasks while you're viewing any calendar. When viewing the daily or weekly calendars, create a new task by double-clicking a blank portion of the task area. The task area is on the right of the Daily Calendar, and at the bottom of the Weekly Calendar.

Daily Calendar



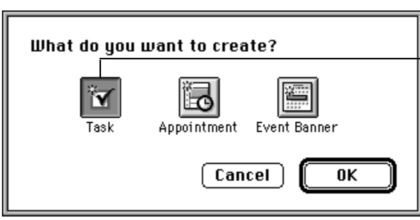
Double-click to create a new task

Weekly Calendar



Double-click to create a new task

When viewing the Monthly Calendar, create a new task by double-clicking a day. Click Task in the dialog box that appears, then click OK.



Click to create a task

The task you create appears as a bulleted item on that day in the Monthly Calendar.

Transferring tasks to your handheld

Tasks 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 task list in Palm Desktop software, and synchronizes changes made in either the handheld or the Macintosh.

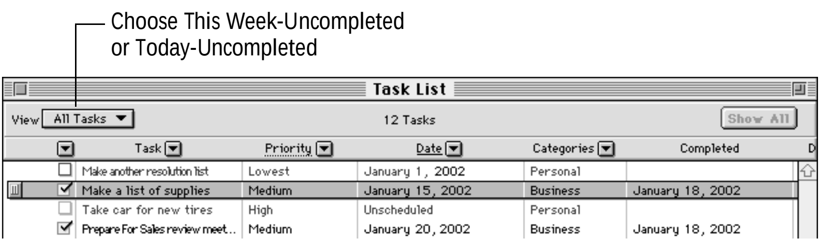
The following list shows the details of the data transfer between your Macintosh and your handheld:

Palm™ Desktop software items	Transfer to To Do List on handheld as
Task text	To Do text
Priority	Priority Lowest priority in Palm Desktop software transfers to priority 5 on the handheld; highest priority transfers as priority 1.
Completed checkbox	Completed checkbox
Task date	Date Due field
Carry Over After Due checkbox	Does not transfer to the handheld Items remain in the To Do List on the handheld regardless of their due dates.
Repeat Task checkbox	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.
Task categories	Category The first category you assign to a contact is transferred to the handheld. The second category does not transfer. See “Transferring categories to your handheld” in Chapter 8.
Tasks created from the calendar view	To Do List items These tasks transfer to the handheld without any connection to the Date Book application on the handheld. The task date is transferred as the Date Due on the handheld.
Task reminders	Do not transfer to the handheld The task created with a reminder setting transfers to the handheld, but no alarm is set on the handheld.

Palm™ Desktop software items	Transfer to To Do List on handheld as
Attachments to tasks, such as notes, appointments, or contacts	Relationships do not transfer to the handheld The task and each attached item transfer to the handheld to their corresponding applications. The relationship between the items does not transfer.
File attachments to tasks	Do not transfer to the handheld

Viewing tasks

To see your tasks in a list, choose Task List from the View menu or click the View Task List button on the toolbar.

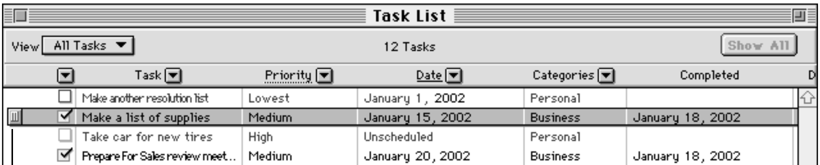


Two special views of your tasks are available by default. Choose This Week-Uncompleted or Today-Uncompleted from the View pop-up menu. The uncompleted tasks also display.

For information about selecting tasks, or groups of tasks, see Chapter 7.

Editing tasks

Before you can delete, duplicate, or change a task, you must select it. Show the task list, then click the task you want to select. Double-click to open the task dialog box.



Selected task

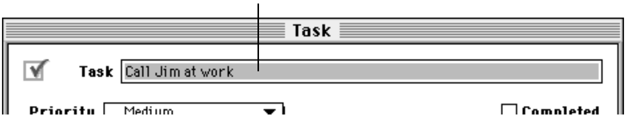
In the daily or weekly calendars, you can also click a task to select it, and double-click to open it.

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

Renaming tasks

You can rename a task whenever you like. In the Task dialog box, drag to highlight the current task name, then type the new name. Click OK.

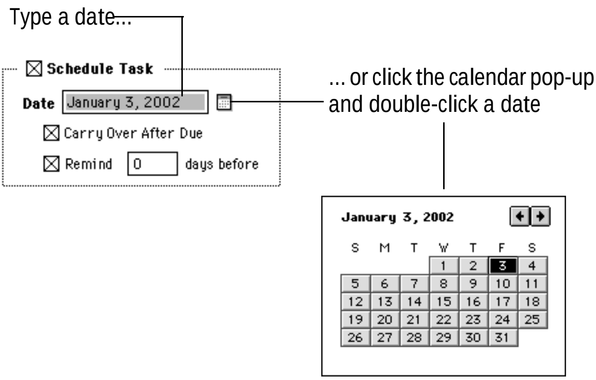
Drag to highlight, then type the new task name



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

Changing task dates

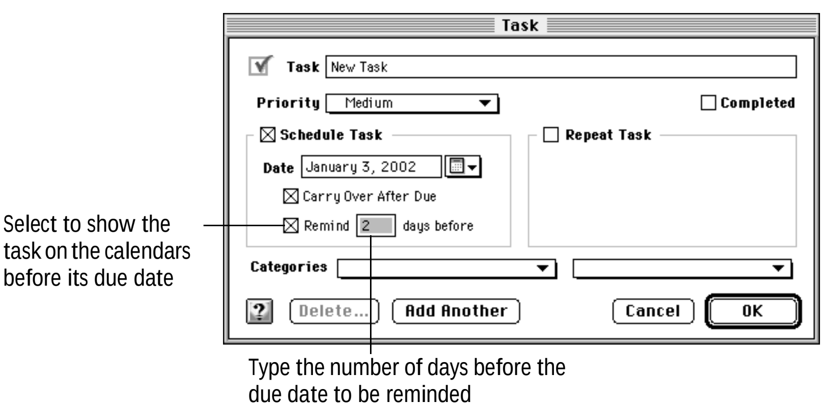
You can change a task date at any time. In the Task dialog box type a new date, or choose a date from the calendar pop-up .



You can also quickly change the day a task is to be done by viewing the Weekly or Monthly Calendar, then dragging the task from its current date to a new one.

Setting task reminders

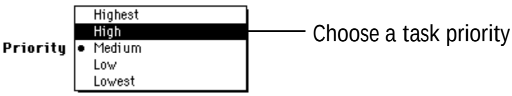
You can be reminded of upcoming tasks. To set reminders, create a new task or double-click an existing one. In the Task dialog box, select the Remind checkbox. Type the number of days before the task due date you want to be reminded. For example, if you have a task due on Friday, and you want a reminder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



Note Reminders for tasks do not transfer to your handheld. To set an alarm for your handheld from the Macintosh, create an appointment instead of a task.

Setting task priorities

To prioritize tasks, in the Task dialog box, choose a priority from the Priority pop-up menu.



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

Priority	Color
Highest	Red
High	Orange
Medium	Gray
Low	Green
Lowest	Blue

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

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

Changing a repeating task's interval

You can change how often a task repeats in the calendars. In the Task dialog box, choose a new interval from the Repeat Task pop-up menu.

Adding or changing a task category

To change a task's category, click the left category pop-up menu in the Task 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 task has a category selected and you want to remove the category, click the category pop-up window and choose None.

Choose a new task category

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

Moving tasks in the calendar

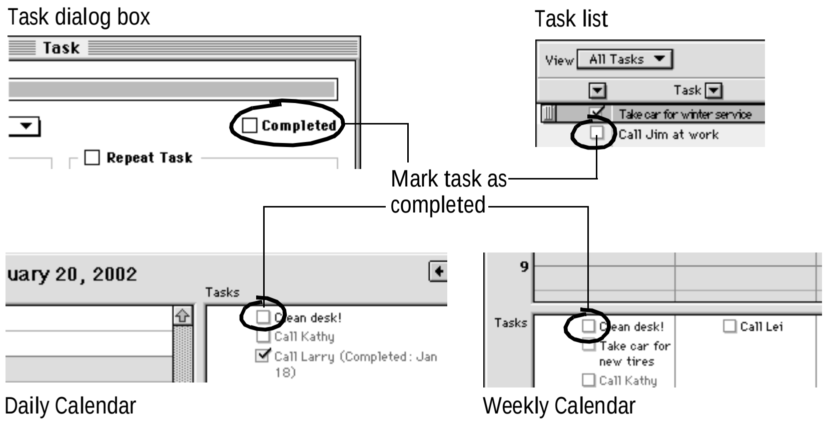
To help you see at a glance what tasks you need to do, you can rearrange the listings of your tasks in the daily or weekly calendar views. Click the task you want to move and drag it to its new position.

You can also quickly change the day a task is to be done by viewing the Weekly or Monthly Calendar, then dragging the task from its current date to a new one.

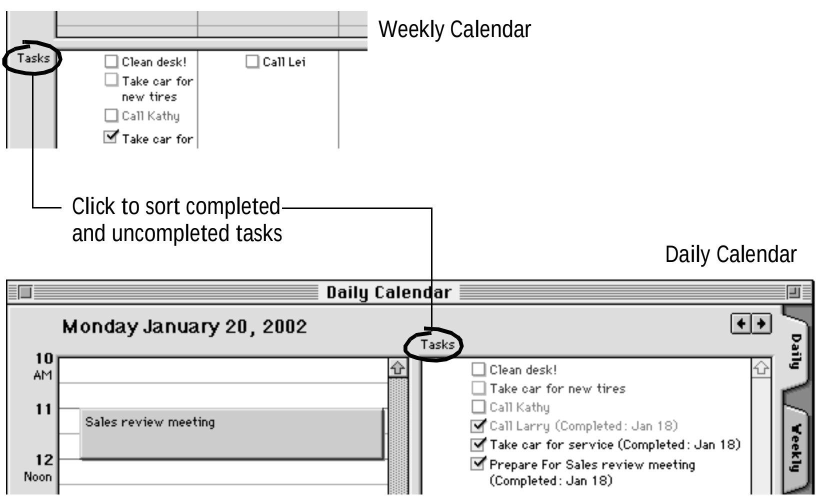
Marking completed tasks

After you finish a task, you can mark it as being completed. This is useful when sorting tasks—you can separate tasks which have been completed from those which haven't.

To mark a task as completed, select the Completed checkbox in the Task dialog box. You can also select the box next to a task in the task list, Daily Calendar, or Weekly Calendar.



After you mark tasks as completed, you can sort the completed and uncompleted tasks in the daily or weekly calendars by clicking the Tasks label. The uncompleted tasks appear at the top of the list, and the completed tasks move to the bottom. Within those two groups, the tasks are sorted by priority, from highest to lowest.



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

Deleting tasks

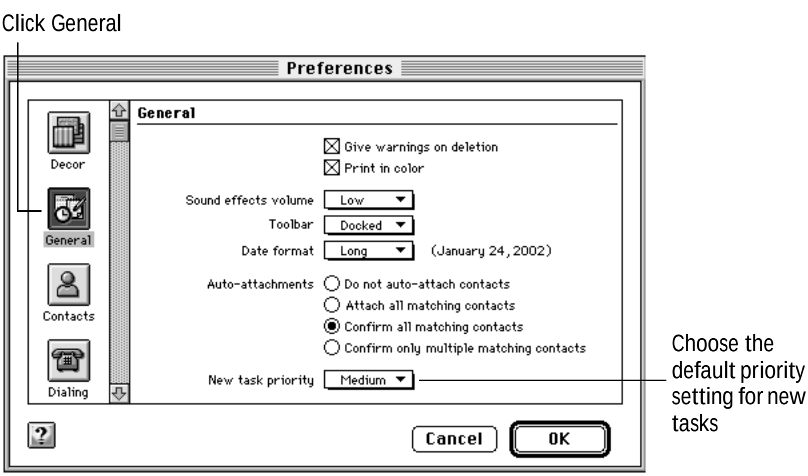
To delete a task, click it in the task list, then choose Delete Task from the Edit menu. You can also click the Delete button on the toolbar. Confirm your choice by clicking Delete when the dialog box appears. The next time you perform a HotSync operation, this task is deleted from your handheld.

You can also click the Delete button in the Task dialog box to delete existing tasks. This button will not be available in a newly created Task dialog box; you must first click OK to save the task.

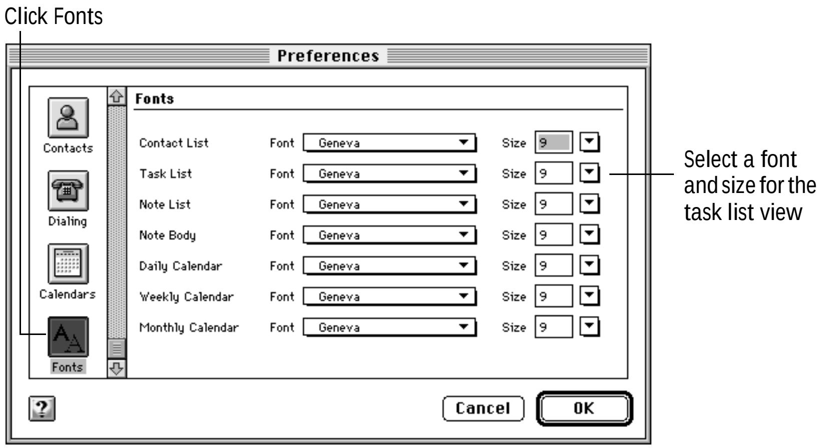
For more information about archiving items you delete from your handheld, see “Archiving data you delete from your handheld” in Chapter 12.

Setting task preferences

You can set preferences for default task priorities, task list fonts, and task list font sizes, by choosing Preferences from the Edit menu.



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



Chapter 7

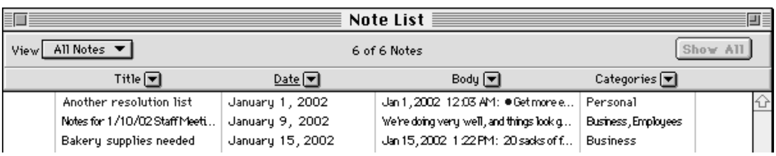
Working with Lists

This chapter explains the basics of working with list views for contacts, notes, and tasks.

About list views

When you view lists of your contacts, notes, and tasks, you see the information in rows and columns. Each row represents a contact, note, or task. Each column represents a field used for typing and storing information about one of these items. You can double-click an item at any time to view or change it.

Note list



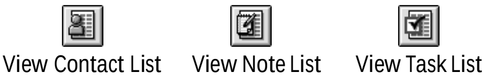
Task list

Contact list

Note A list view is not available for calendar information (appointments and event banners).

Viewing a list

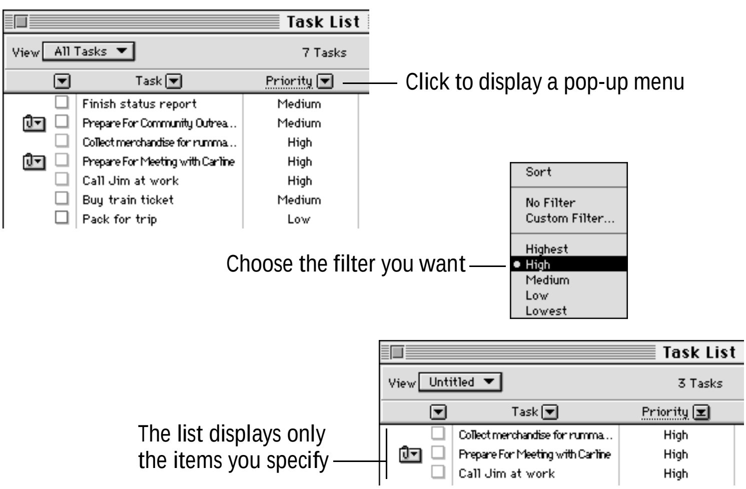
To display one of the list views, choose Contact List, Note List, or Task List from the View menu, or click the View Contact List, View Note List, or View Task List buttons on the toolbar.



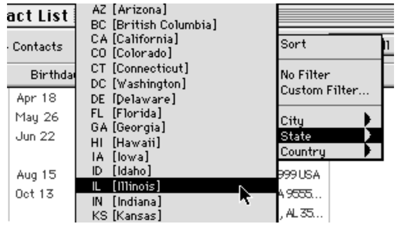
Viewing selected contacts, notes, and tasks

You can change a list to display only the contacts, notes, or tasks you want. By creating a filter, you can show certain items 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 items you've created.

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



You can have more than one filter in effect at a time. For example, in your contact 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.



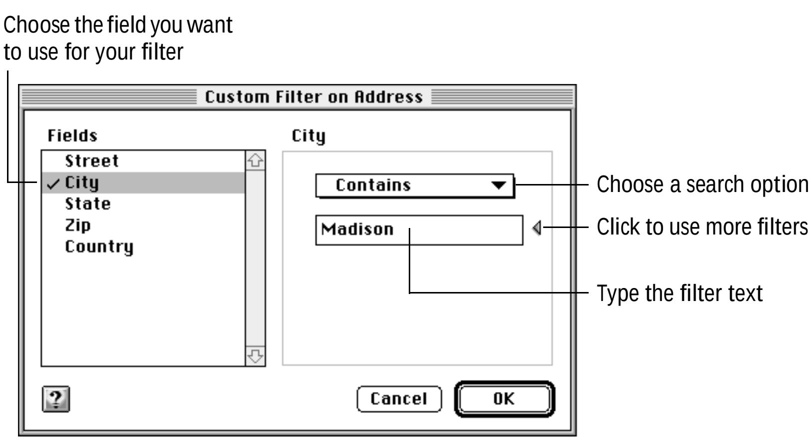
For more information

From the Help menu, choose “Search Index for” and type:

- `lists, viewing partial`

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.



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" is found, but not "Sonders."
Are exactly the filter text	Is	To find only the name "Sonders", type "sonders". Only those contacts with this name are found, but not "Thompson" or "Gleason."
Do not exactly match the filter text	Is Not	To find all contacts except those with the name "Sonders", type "sonders".
Do not contain the filter text	Doesn't Contain	To find all contacts except those with "son" in them, type "son". "Miller," "Jones," and "Smith," are found, but not "Thompson" or "Sonders."
Are blank	Is Empty	Choose to find all contacts with a blank name field.
Are not blank	Is not Empty	Choose to find no contacts with a blank name field.

You can also use the Find feature to view selected records. For more information, see Chapter 8.

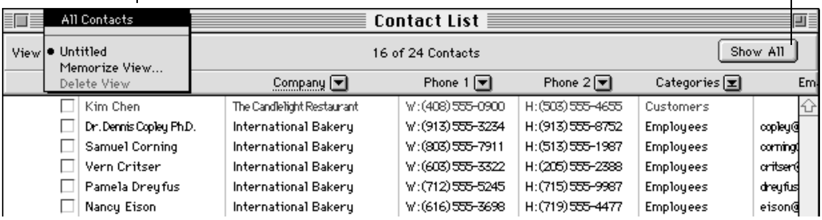
Note After creating filters you can save the resulting view if you think you'll be using it again. See "Memorizing views of selected data" in this chapter for more information.

Removing filters

You can easily remove all filters to see all items by clicking Show All in the top right corner of the list window. Or choose All Contacts, All Tasks, or All Notes from the View pop-up menu in the upper left corner of the window.

Choose All Contacts (or All Notes or All Tasks) from the View pop-up menu to see all contacts, notes or tasks...

...or click the Show All button

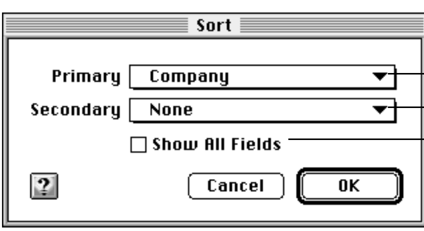


You can also remove a filter from a single field. Find the field that has the filter you want to remove (scroll left or right if necessary), click the at the top of the column to see the filter pop-up menu, and choose No Filter. The filter is removed from that field, but it remains available in the filter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



Select the primary sort field

Select the secondary sort field, if any

Select to reveal any hidden fields

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 contact 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.

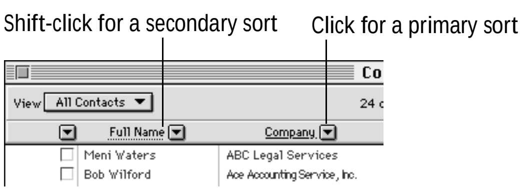
If you want to sort hidden columns, select the Show All Fields checkbox. For more information, see "Selecting columns to display in a list" in this chapter.

When your data is sorted, you see a solid underline beneath the name of the field that is the primary sort, and a dotted line beneath the name of 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.



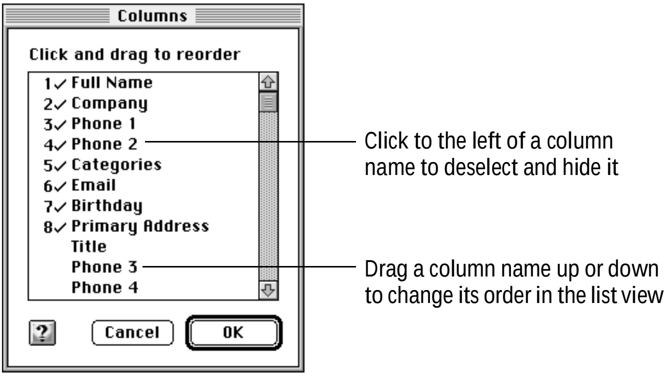
- Choose Sort from the pop-up menu

  Click the triangle 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.

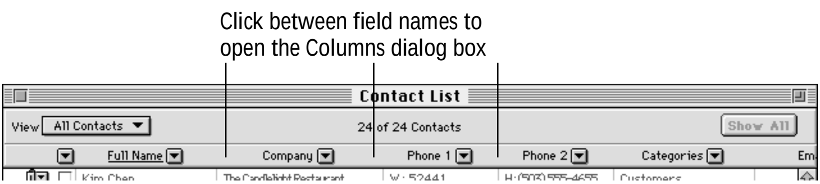
Selecting columns to display in a list

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 a contact list, note list, or task list. Then choose Columns from the View menu.



You can also open the Columns dialog box by double-clicking the title area of any list view, between the field names.

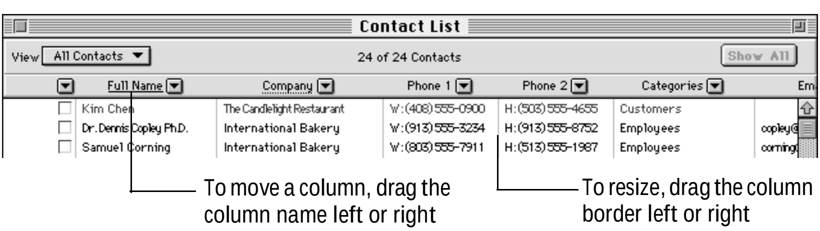


Resizing and reordering columns

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 the ↔ pointer as you drag.

To resize a column, drag the column border left or right.



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, then choose Memorize View from the View pop-up menu

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

Type view name

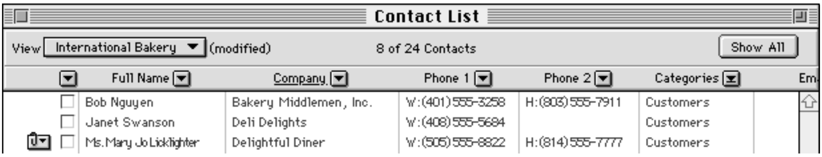
Select	To remember
Current Sort	Data sorted as it is now
Column Arrangement	Current column order and which columns are visible
Window Positions	Current window positions and window size

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 task 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 list.



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

Deleting memorized views

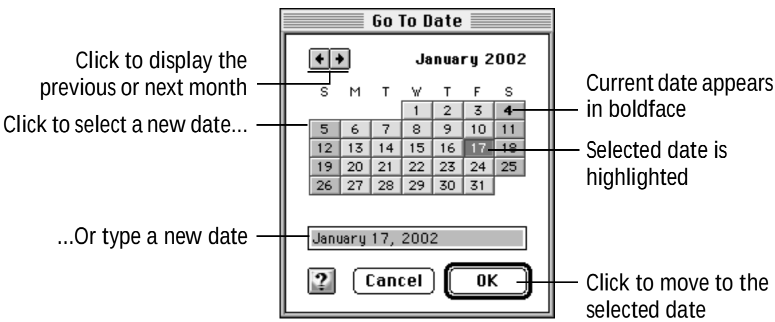
To delete a memorized view, choose it from the View pop-up menu, then choose Delete View.

Finding Information

This chapter explains the basics of finding 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 Date button on the toolbar.



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

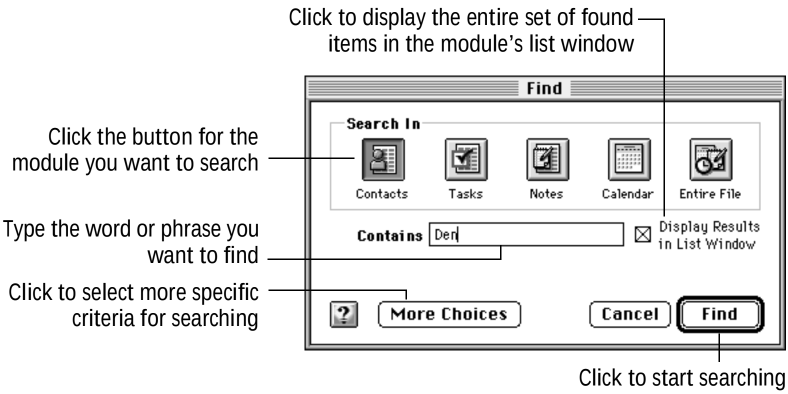
- Long format: `month,day,year`
- Short format: `mm/dd/yy`, `mm dd yy`, or `mm.dd.yy`

In the Go To Date dialog box, press Command-Left Arrow to display the previous month and Command-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 Go To 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.

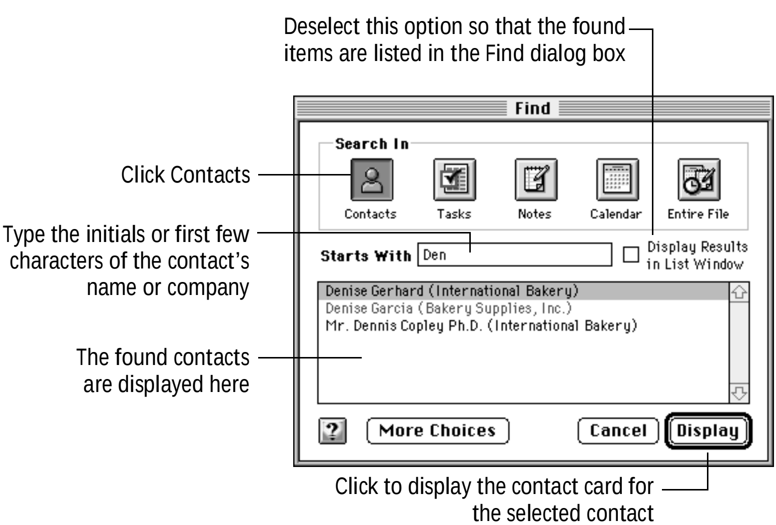


To repeat the search, choose Find Again from the Locate menu.

Finding contacts quickly

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

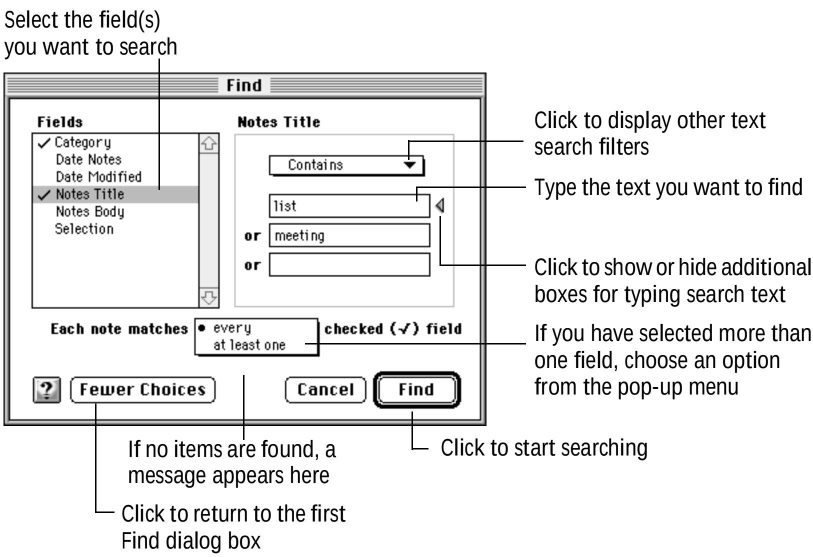
When you do this type of search, only the Name, Company, and Nickname fields are checked, and only text that starts with what you type is found.



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 the Notes module, and then select the Notes 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 contact list, note list, and task list. You can save the search criteria when you memorize a view. See Chapter 7 for more information.

For more information

From the Help menu, choose "Search Index for" and type:

- searching

Displaying recent items

The Recent submenu lists the last 20 items you:

- Created
- Selected
- Viewed as a note card or contact card

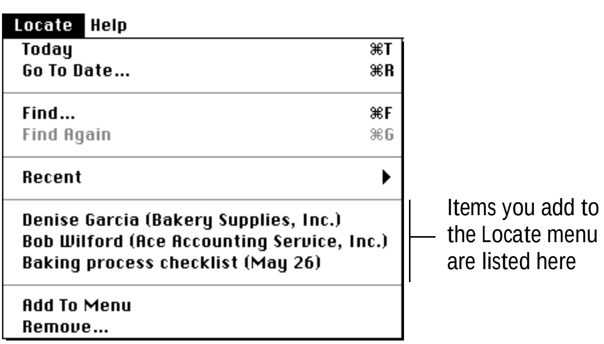
To display an item you recently used, choose Recent from the Locate menu and then choose an item from the submenu.

Finding frequently used items

If you frequently search for a certain item, such as a customer account or notes 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 50 items.

Note If you frequently look up information about certain contacts, add those contacts to the Instant Palm™ Desktop menu, so you can access the information when you are not running Palm™ Desktop software. See Chapter 13 for more information.

To add an item to the Locate menu, go to the item, select it, and then choose Add To Menu from the Locate menu. To remove an item from the Locate menu, choose Remove from the Locate menu. In the Remove Items dialog box, select the item you want to remove and click Remove.



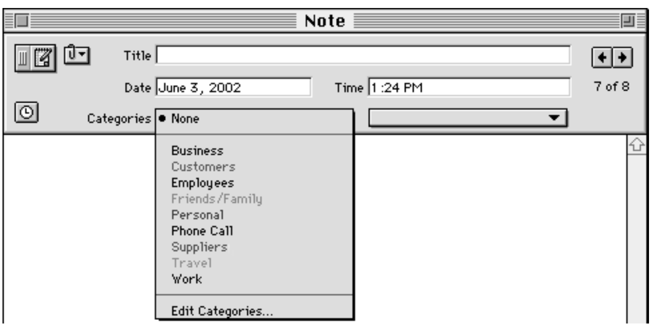
Working with categories

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

Assigning categories

Create or select an item. In the item's creation dialog box or card, choose a category from one or both of the Categories pop-up menus.

To assign a category to several items in a list at one time, Shift-click them and choose Categories from the Edit menu and then a category from the submenu. If an item already has been assigned a category, the new category is displayed in the second Categories pop-up menu.



Categories pop-up menu in a note card

Note To unassign a category, choose None from the Categories pop-up menu.

For more information

From the Help menu, choose "Search Index for" and type:

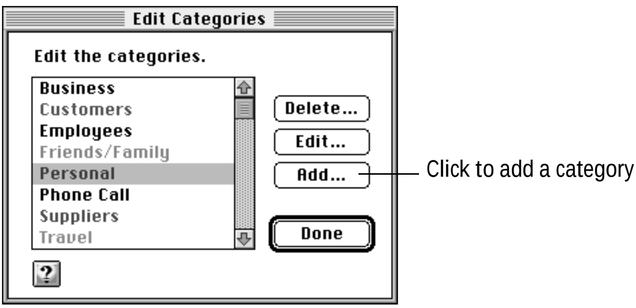
- `categories`

Creating categories

There are has several default categories, such as Customers and Friends / Family. You can create your own categories and assign them to any item.

Create or select an item 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. 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 appointments do not transfer to your handheld.

To best use categories between your handheld and your Macintosh, 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, then perform a HotSync® operation, the item is moved to the new category in Palm Desktop software.

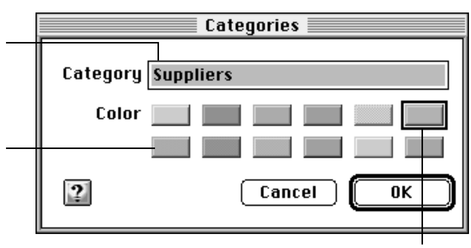
The following list shows the details of the data transfer for categories between your Macintosh and your handheld:

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 items assigned to them are found in Palm Desktop software, the items 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.

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.



Type a new name

Click to select another color. If you don't select a color, black will be used, which is represented by the gray block.

Current color is highlighted

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

Deleting categories

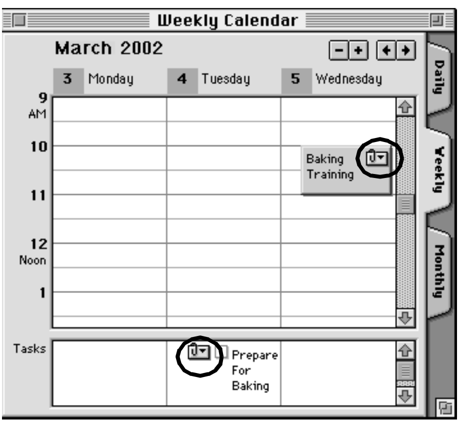
You can delete categories you don't use, including the preset categories. In the Edit Categories dialog box, select the category you want to delete and click Delete.

Chapter 9

Working with Attachments

Attachments are connections between related contacts, tasks, appointments, event banners, notes, and Macintosh files. Attachments help you access information where and when you need it. For example, you can create a task to phone a client and attach this task to the client's contact 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 contact card has.

Note Only attachments connected to calendar items are printed.

Transferring attachments to your handheld

Attached notes, appointments, contacts, or tasks are transferred to the appropriate 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 a contact card for a new customer. At the same time you create an appointment to visit the customer and a note describing the sales information you want to bring to the customer. You attach the appointment and note to the contact card for the customer.

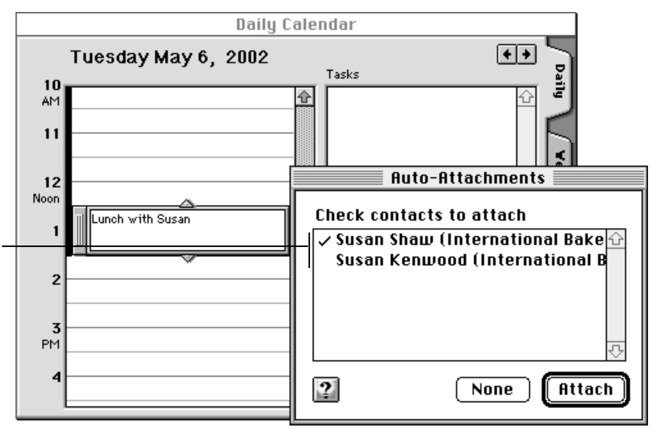
When you perform a HotSync operation, the contact, note, and appointment transfer to the corresponding applications on the handheld. Looking up the customer in the Address Book in the handheld, you see the customer's information. To see the note and appointment, you must look them up in the Memo Pad 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 note in Palm™ Desktop software when you perform a HotSync operation. The attached note appears with the title "Handheld Note: *XXX*."

Automatic attachments

When you create a task, appointment, event banner, or note, you are prompted to attach contacts to the new item. The contacts are suggested based on the created item's content. For example, if you created an appointment called "Lunch with Susan" and your contacts include Susan Kenwood and Susan Shaw, the Auto-Attachments dialog box opens.

Select the contact or contacts you want to attach to the item



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

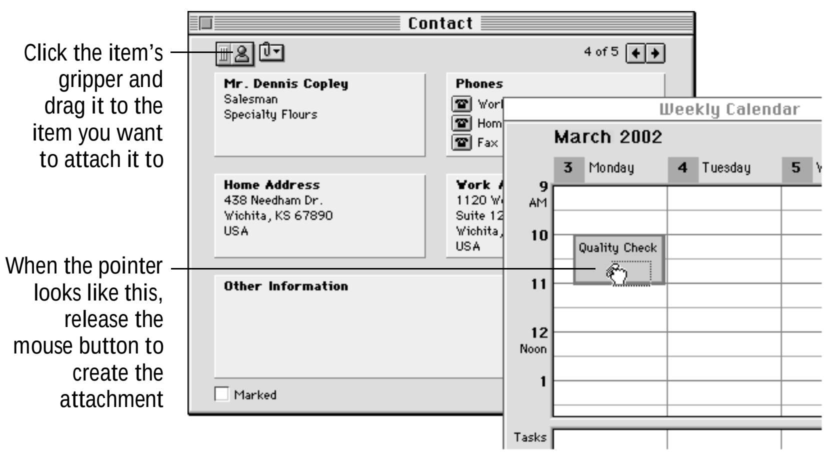
You create an attachment when you want to associate a task, contact, note, appointment, or event banner with another task, contact, note, appointment, or event banner.

Attaching existing items to other existing items

The easiest way to create an attachment is to drag an existing item onto another existing item using the item’s gripper. For example, you can drag a contact card onto an appointment to attach the two to each other.

There are four ways to To attach an existing item to another existing item:

1. Locate both items, arrange the windows so both are visible, then drag and drop one onto the other. If you want to attach two items of the same type, such as a task to a task in the task area of the calendar, press Option as you drag.



2. Locate the first item, choose Existing Item from the Attach to submenu, locate the second item, 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.

3. Locate the first item, 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 item after you choose the first item and the Existing Item option.

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

Indicates the number of attachments this contact has

Click and hold down the paper clip pop-up menu...

...to display attachment options

The gripper appears on various items and looks slightly different, depending on where it's being used.

Attaching new items to existing items

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

The new item is named by default. For example, if you have a contact named Susan Shaw and you select that contact and choose New Task from the Attach to submenu, the task is automatically named “Call Susan Shaw.” You can type over the task name if you want to change it.

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

You can create tasks related to existing appointments and event banners in the calendar. Just drag the appointment or event banner’s gripper to the task area of the appropriate day, and a new task attached to the appointment or event banner is created. You can type over the default name if you want to change it.

You can also create an appointment related to a task by dragging a task to the appointment area of the calendar.

Attaching files to an item

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

After you attach a file to an item, the filename appears in the item's paper clip pop-up menu. When you select the file from the item'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 a contact to have information about the contact copied into the document automatically. See Chapter 3 for more information.

For more information

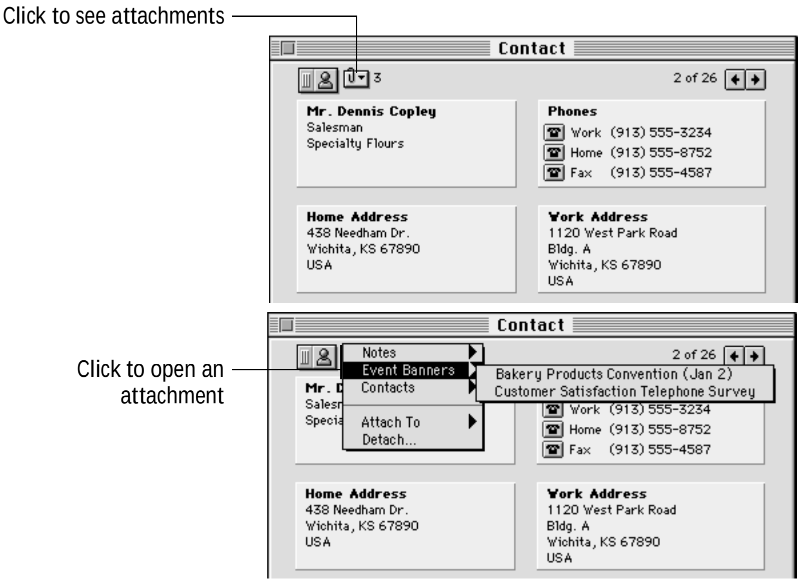
From the Help menu, choose "Search Index for" and type:

- `attachments`

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

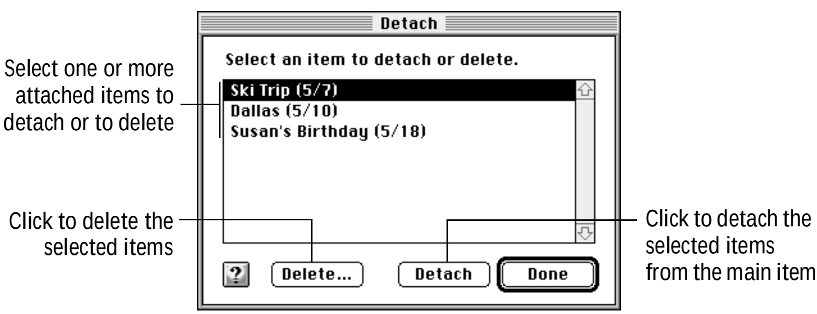
Viewing attached items

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



Detaching items and deleting attached items

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

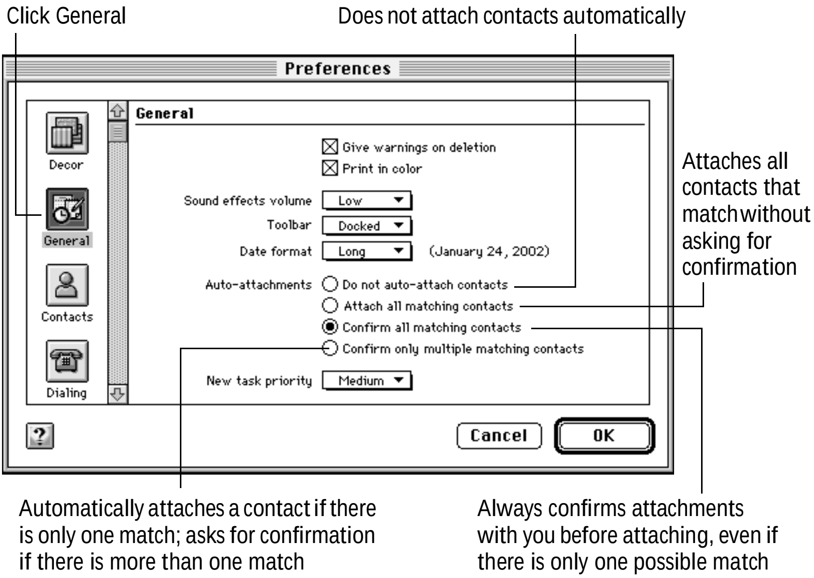


Note The next time you perform a HotSync operation, the item you deleted is deleted from your handheld. Detached items are not deleted from your handheld.

Setting attachment preferences

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

Choose Preferences from the Edit menu.



For more information

From the Help menu, choose "Search Index for" and type:

- `preferences, attachments`

Chapter 10

Importing and Exporting Data

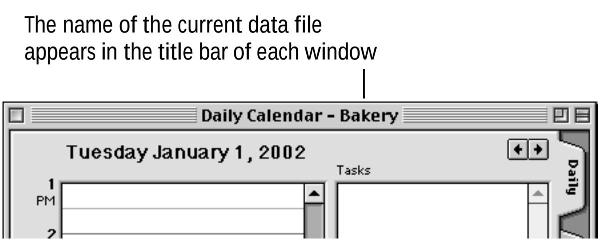
This chapter explains the basics of importing and exporting data.

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 and save it. 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. Launch Palm Desktop software.
3. Verify that the file you use to synchronize with your handheld is open.

   The data file name appears in the title bar of the Palm Desktop software dialog boxes.



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

Your Claris Organizer data is now included in the Palm Desktop 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
- DateBook Pro
- DayMaker
- DynoDex
- Meeting Maker
- Now Contact
- Now Up-to-Date
- QuickDex
- TouchBase Pro

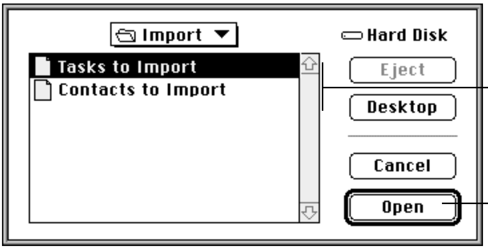
To import data from PIM product files, you must export and save the entire file in text format first. You can import fields from TouchBase Pro, DateBook Pro, DayMaker, and QuickDex files in the proper order. You might have to adjust the field order of other PIM product files you import.

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

You can 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.

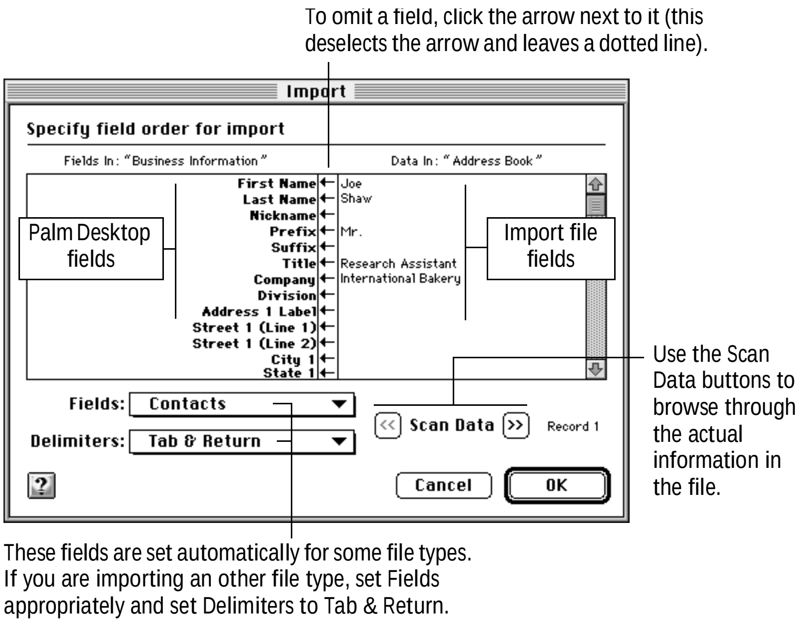
To import a file, export a text file from the other product and then choose Import from the File menu in Palm Desktop software.



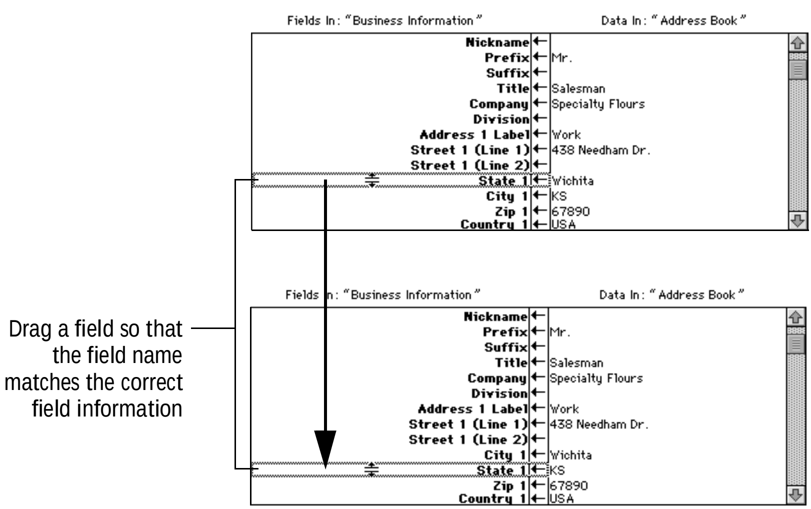
Select the file you want to import

Click to open the selected file

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.



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



For more information

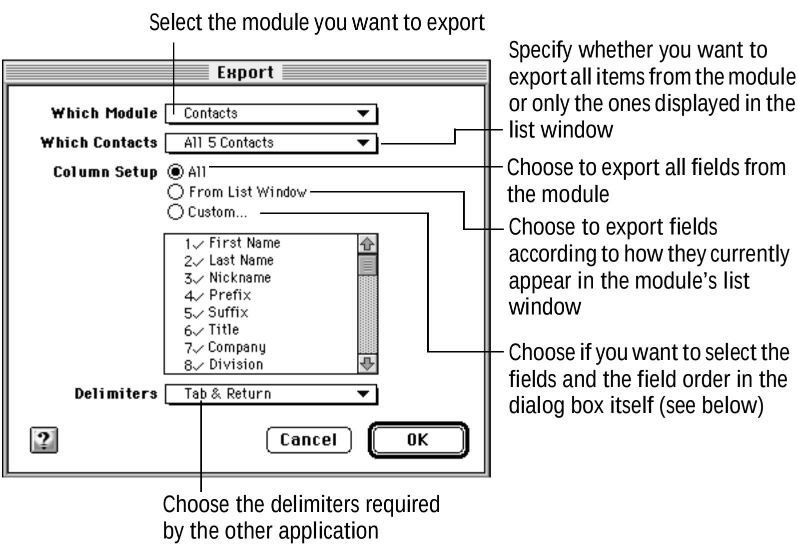
From the Help menu, choose “Search Index for” and type:

- `data, importing`

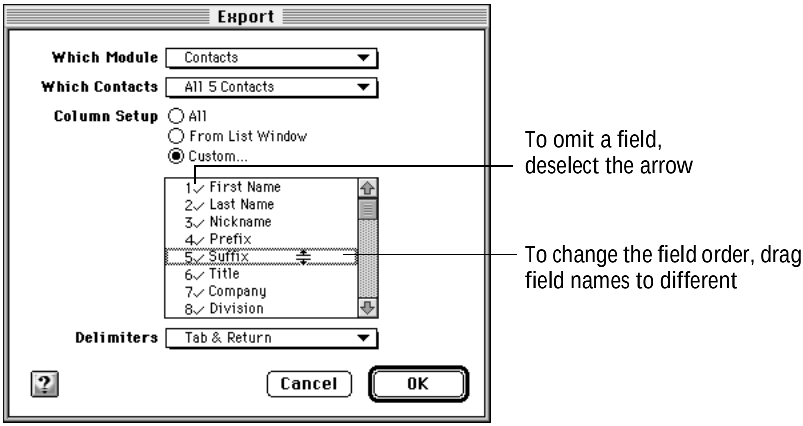
Exporting data

You can export data from Palm Desktop software so you can use it 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.

To export data, choose Export from the File menu. The Export dialog box appears.



If you want to do a custom export, choose Custom for Column Setup, then select the fields and the field order in the dialog box.



For more information

From the Help menu, choose "Search Index for" and type:

- `data, exporting`

Chapter 11

Printing

This chapter explains the basics of printing. For information on double-sided printing, see Appendix A.

About printing

You can print:

- Calendars
- Day planner pages
- To-do lists
- Contact lists
- Address books
- Envelopes
- Mailing and return address labels
- Fax cover sheets
- Notes

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

You can print the contents of your handheld's applications through Palm™ Desktop software. To do so, perform a HotSync® operation to transfer the information from the handheld to your Macintosh, then print as described in these topics.

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

For more information

From the Help menu, choose "Search Index for" and type:

- `printing`

Selecting items to print

When printing contacts, tasks, or notes, 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 (contacts only)

You need to view your contacts, notes, or tasks as a list to select items for printing. Choose Contact List, Note List, or Task List from the View menu.

After you view your data as a list, you can select the items you want to print.

Filtering

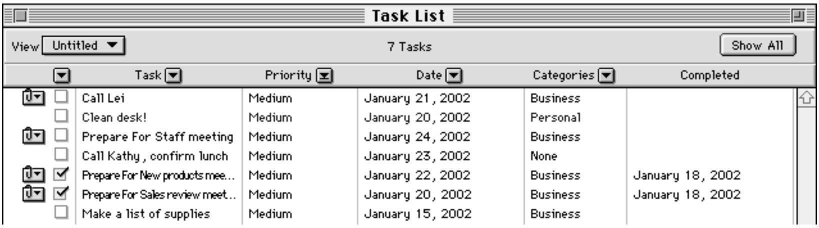
You can use filters to show only a portion of your contacts, notes, or tasks. For example, you could create a filter to show only the contacts with the category “Employees.” After you do that, the list view shows only the contacts in that category.

To print these contacts, choose the Contacts in List option from the Which Contacts 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 tasks with a priority of "medium." After you do that, the list view shows only those tasks with priorities set to medium.

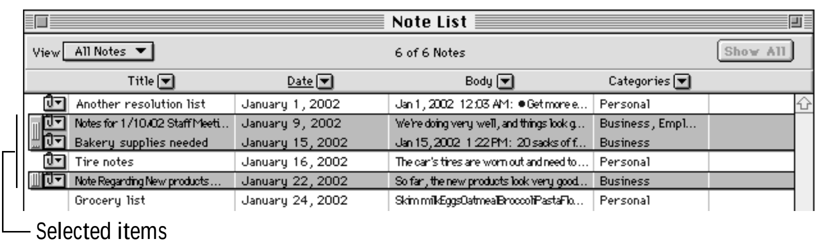


To print these tasks, choose the Tasks in List option from the Which Tasks pop-up menu in the Print dialog box.

For more information on using the Find feature, see Chapter 8.

Selecting items

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



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

For more information on selecting items, see Chapter 7.

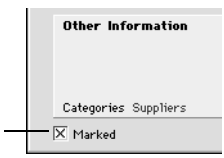
Marking contacts

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

Marked contacts

You can also mark a contact from the contact card.

Select to mark a contact



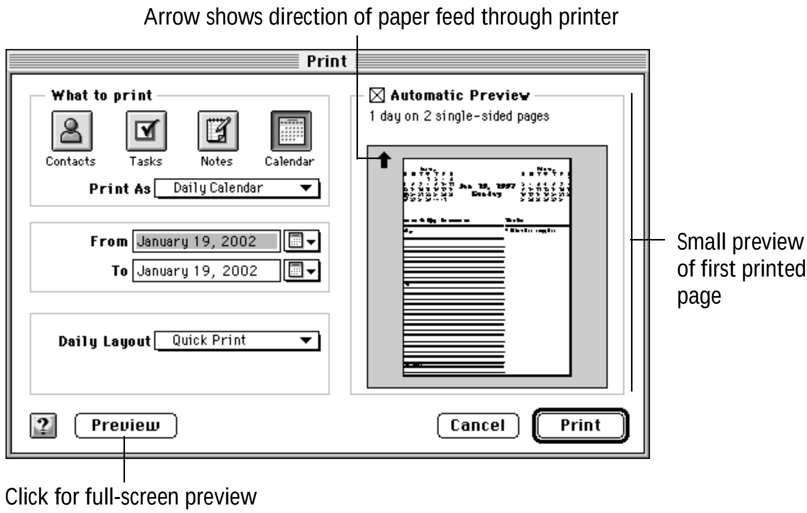
To print the marked contacts, choose the option for Marked Contacts in the Which Contacts pop-up menu in the Print dialog box.

Marked contacts stay marked after the file is closed. For more information on marking contacts, see Chapter 3.

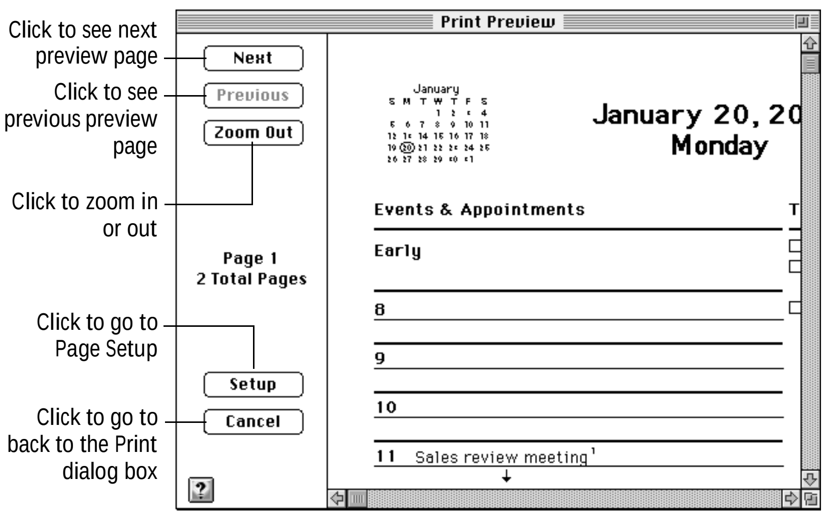
Previewing information

You can preview any kind of 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 checkbox.

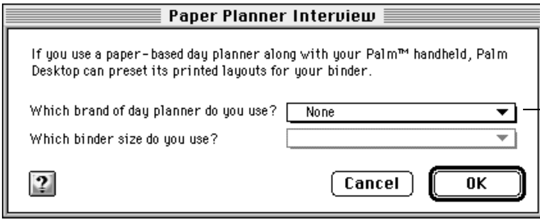


If you want to see a larger preview, or you want to preview more than the first page of the printed information, click the Preview button, or click once in the preview sample when the pointer becomes a magnifying glass. A dialog box opens showing you a larger preview.

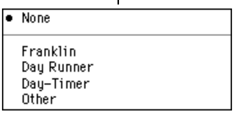


Setting up printing for day planners

The first time you print you are prompted about your preferences for printing in the form of day planner formats.



Choose a day planner



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.

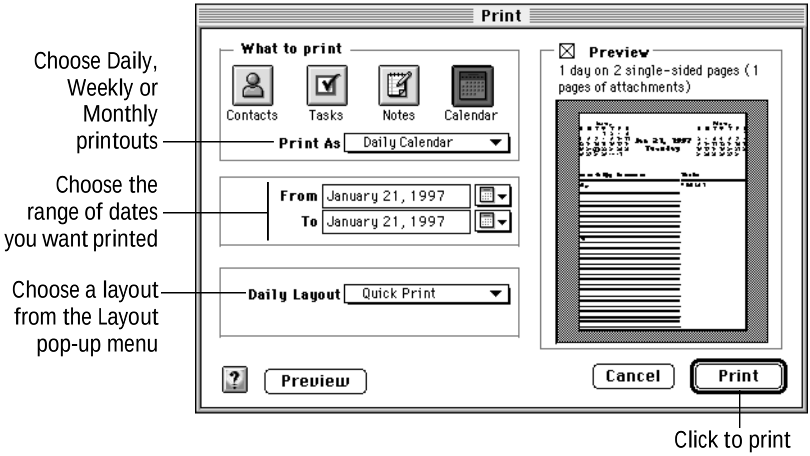
If you decide not to choose a day planner now, you can make a selection later. You can also change your selection if you like. See "Changing or adding day planner information" in this chapter.

Printing calendars

You can print daily, weekly, or monthly calendars for your day planner, or for a printing layout you create.

Note When you print calendars, any attachments connected to the calendar items also print. Attachments only print with calendars.

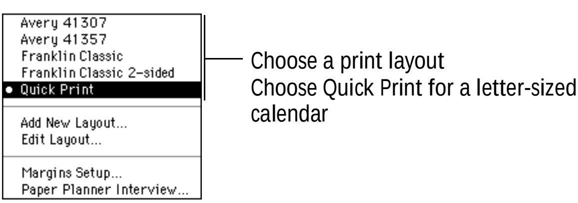
Choose Print from the File menu, or click the Print button on the toolbar. Then click the Calendar button in the Print dialog box.



From the Print As pop-up menu choose the type of calendar you want to print: Daily, Weekly, or Monthly. The Daily Calendar–Text option prints a simple list of your appointments, without any calendar graphics.

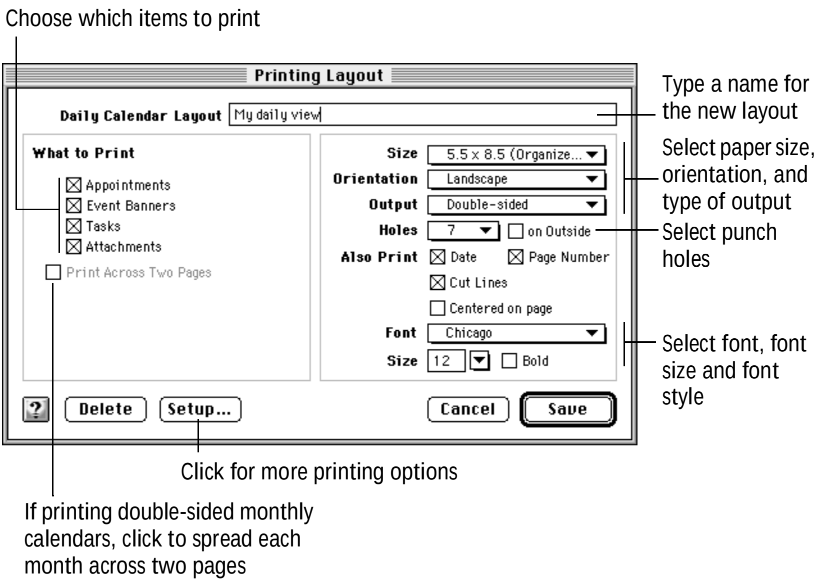
Change the From and To boxes so they show the range of dates that you want printed. If you want to print one day's worth of information, type that date into both boxes. You can also use the calendar pop-up  instead of typing a date.

Choose a printing layout from the Daily Layout, Weekly Layout, or Monthly Layout pop-up menu. (The name varies, depending on which type of calendar you're printing.)

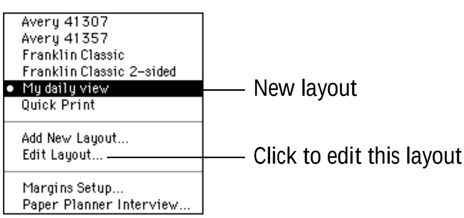


Changing printing layouts for calendars

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 calendar layout you want to create: Daily, Weekly, or Monthly. Then choose Add New Layout from the Layout pop-up menu. The Printing Layout dialog box appears.



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



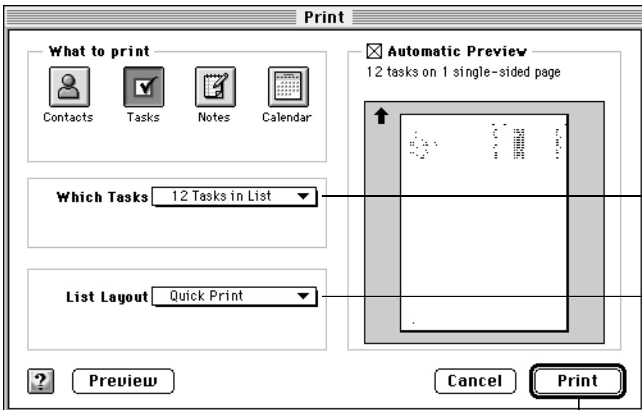
To change or delete a layout, choose it from the Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing task lists

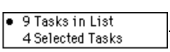
You can print tasks together with calendar information. However, you can also print tasks separately for a convenient “to-do” list.

You can choose which tasks you want to print—the entire set, or a smaller group. For more information, see “Selecting items to print” in this chapter.

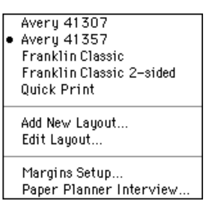
Choose Print from the File menu, or click the Print button on the toolbar. Then click the Tasks button in the Print dialog box.



From the Which Tasks pop-up menu, choose which tasks you want to print.

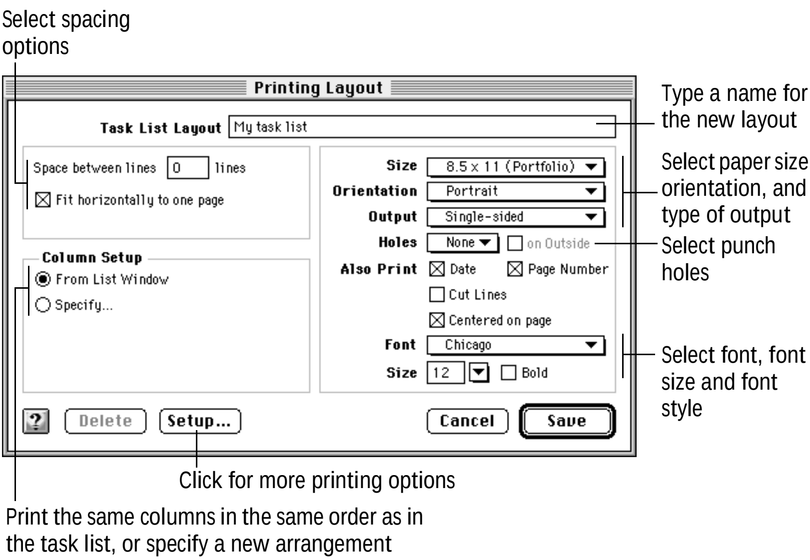


Choose a layout from the List Layout pop-up menu.

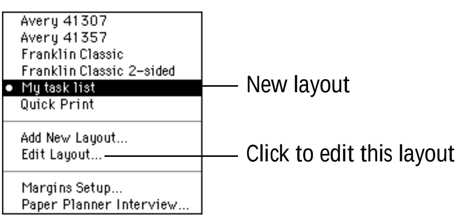


Changing printing layouts for task lists

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.



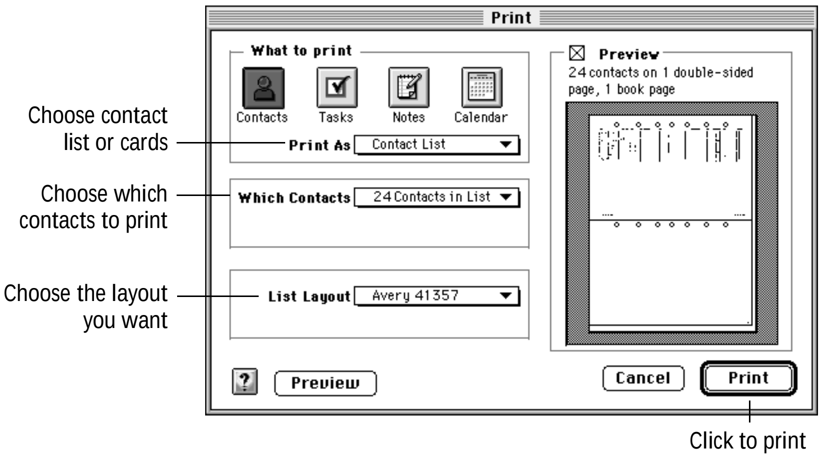
To change or delete a layout, choose it from the List Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing contact lists

You can print your contacts in a simple list for quick reference.

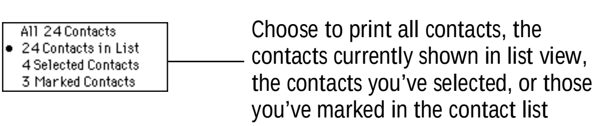
You can choose which contacts you want to print—the entire set, or a smaller group. For more information, see “Selecting items to print” in this chapter.

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

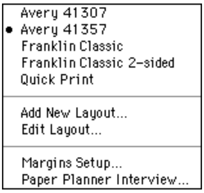


From the Print As pop-up menu, choose either Contact List or Contact Cards. A contact list prints your contact information in rows and columns. A contact card prints information for one contact.

Choose the contacts you want to print from the Which Contacts pop-up menu.



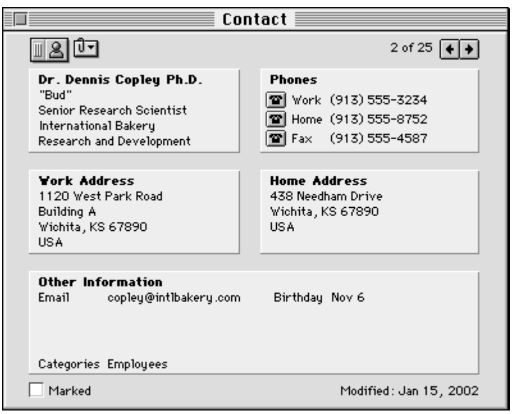
After you have decided which contacts you want to print, choose a layout from the List Layout pop-up menu.



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

Printing a contact card

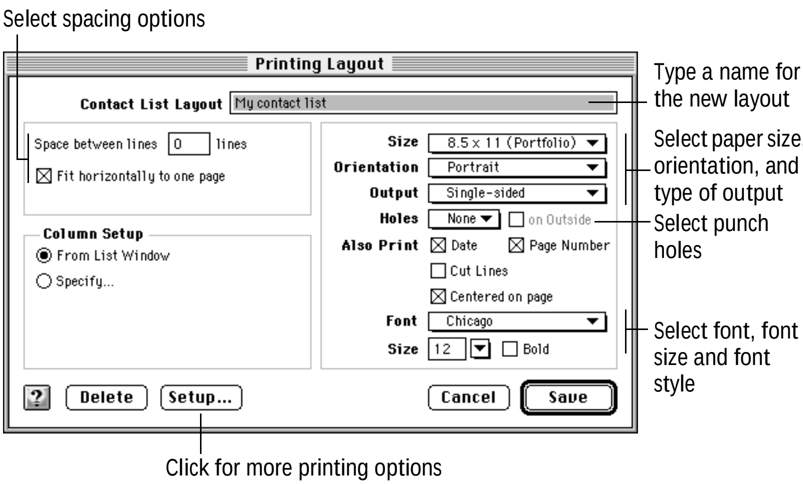
If you want to print a single contact card, first view the card by double-clicking it from the contact list. Then choose Print from the File menu, or click the Print button on the toolbar. When you print while viewing a contact card, the Print As pop-up menu is set to print a contact card.



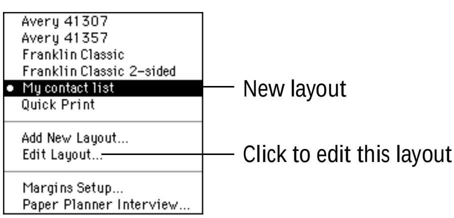
While viewing a contact card, you can choose to print the contact information in other ways, such as on an envelope, fax cover sheet, or label.

Changing printing layouts for contact lists

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.



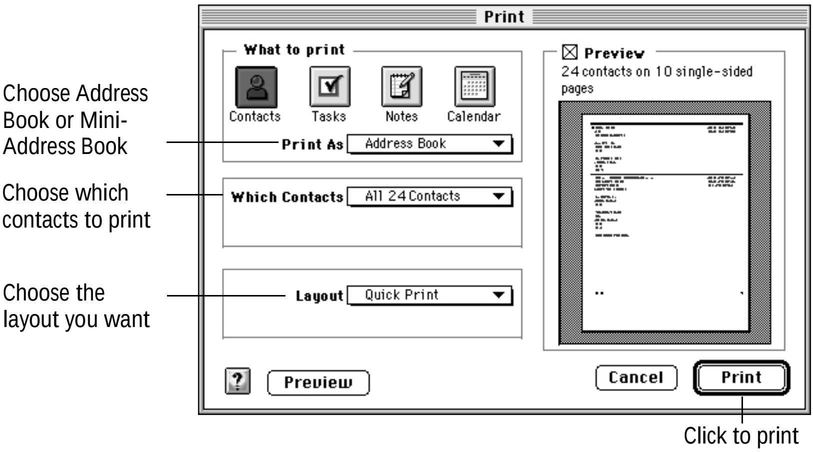
To change or delete a layout, choose it from the List Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing 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 contacts you want to print—the entire set, or a smaller group. For more information, see “Selecting items to print” in this chapter.

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



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

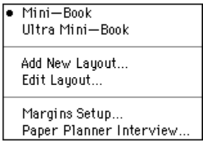
Choose the contacts you want to print from the Which Contacts pop-up menu.

Choose to print all contacts, the contacts currently shown in list view, the contacts you’ve selected, or those you’ve marked in the contact list

After you have decided which contacts 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 contacts 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

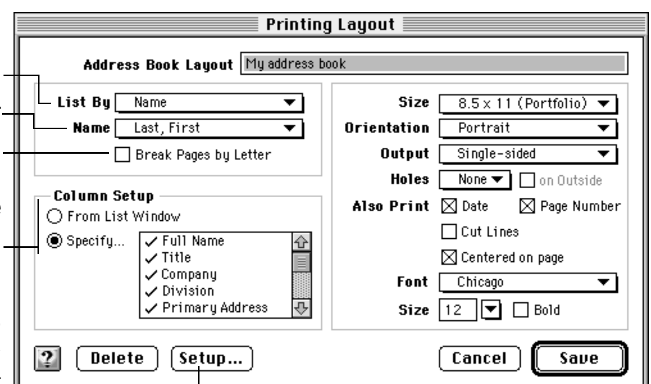
If the available Address book layouts aren’t what you need, you can create a new layout. From the Layout pop-up menu, choose Add New Layout. The Printing Layout dialog box appears.

Print by name, company or both

Choose name order

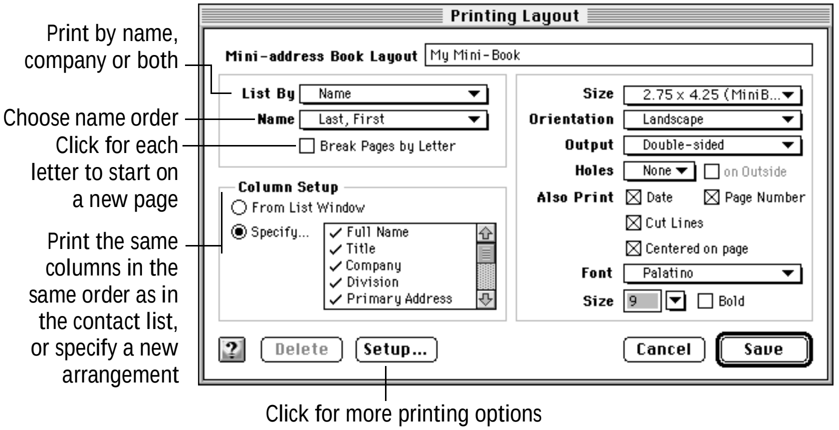
Click for each letter to start on a new page

Print the same columns in the same order as in the contact list, or specify a new arrangement

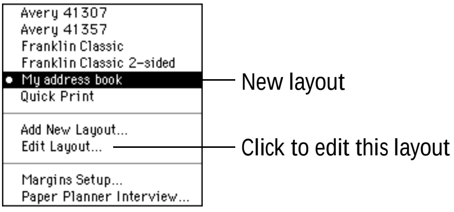


Click for more printing options

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.



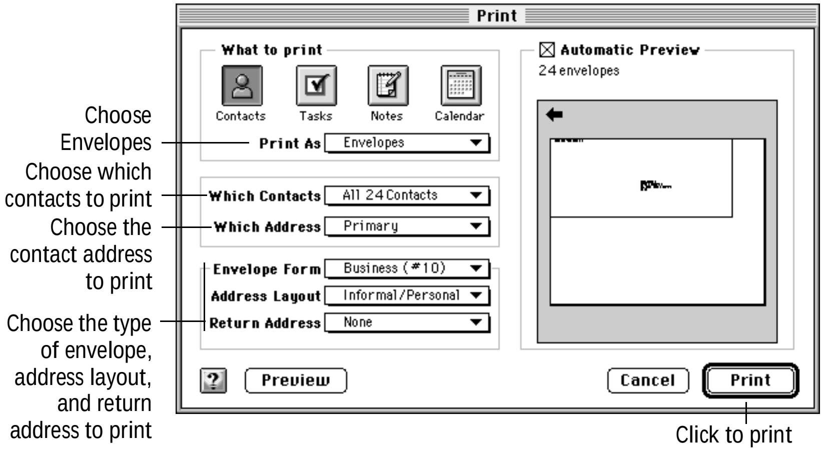
To change or delete a layout, choose it from the Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing envelopes

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

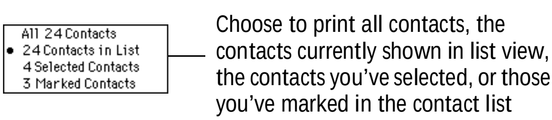
You can choose which contacts you want to print envelopes for—one contact, the entire list, or a smaller group. For more information, see “Selecting items to print” in this chapter.

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

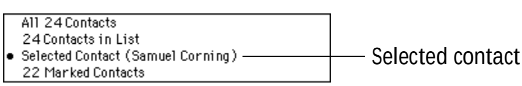


From the Print As pop-up menu, choose Envelopes.

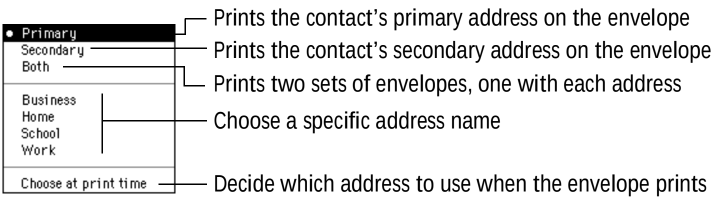
Choose the contacts you want to print envelopes for from the Which Contacts pop-up menu.



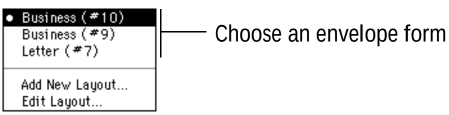
To print an envelope for one contact, display the contact card or select the contact in the contact list. Choose the selected contact in the Which Contacts pop-up menu.



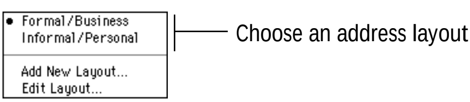
If the contact has more than one address, decide which one you want to use for your envelopes. "Primary" is the default name for the address on the left side of the contact card, and "Secondary" is the default name for the address on the right. If you have chosen other address names in Contacts preferences,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



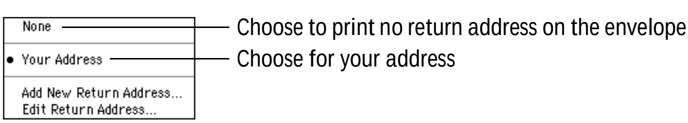
After you have decided which contacts and addresses you want to print, choose an envelope from the Envelope Form pop-up menu.



Choose how you want the contact addresses to appear by choosing from the Address Layout pop-up menu. By default, Formal / Business uses the contact's full name and includes a company name in the address. Informal / Personal uses only the contact'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.

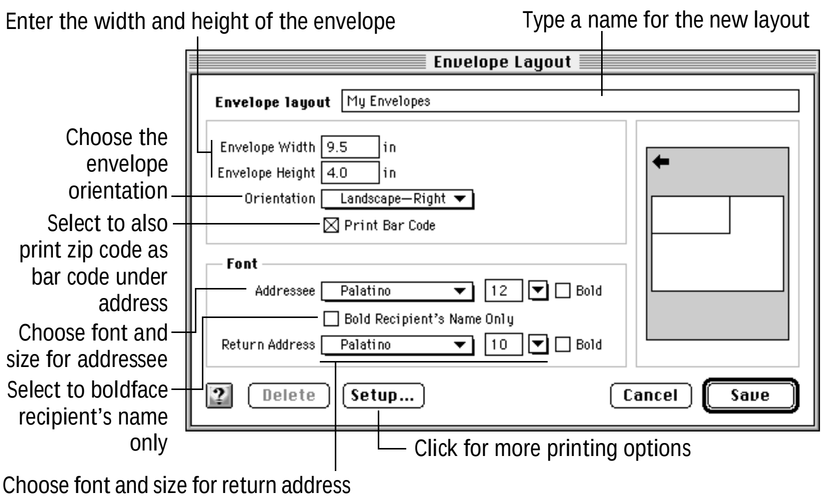


If you have not used a return address before, choose Your Address from the Return Address pop-up. Then choose Edit Return Address. To add a new return address, choose Add New Return Address from the Return Address pop-up menu. See "Return address layouts" in this chapter for information on creating and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

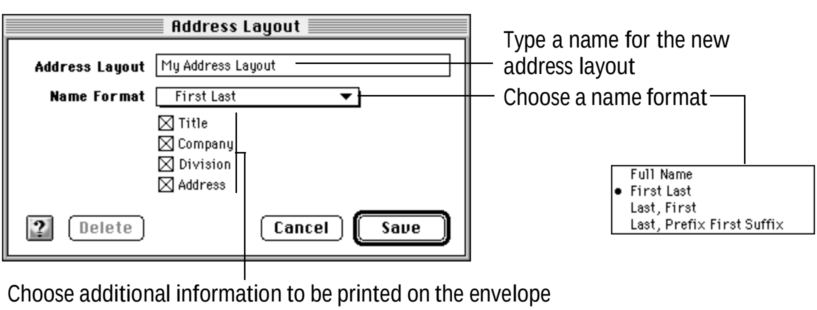
Changing printing layouts for envelopes

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.

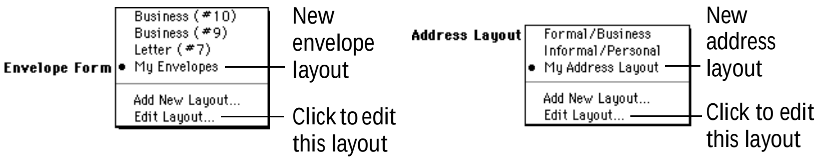


Address layouts

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.

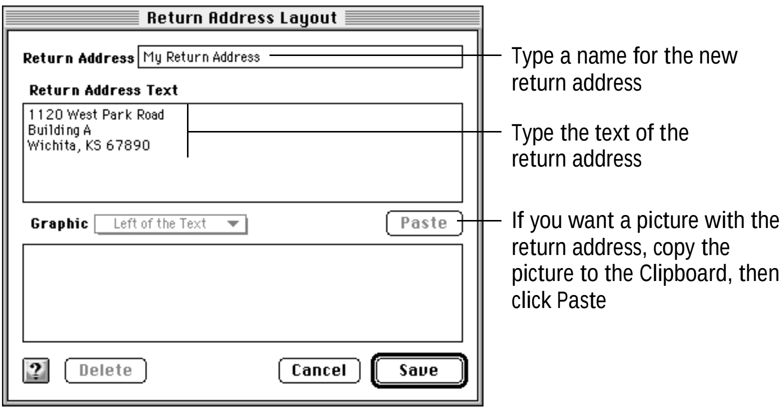


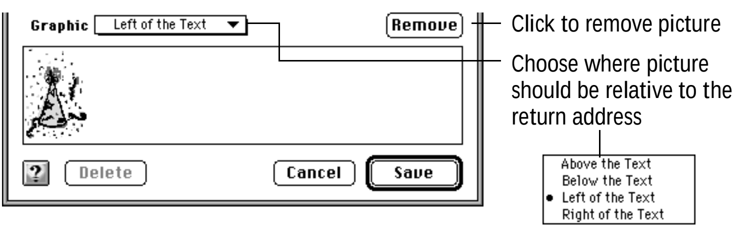
After you create a layout of either type, it appears in its respective pop-up menu.



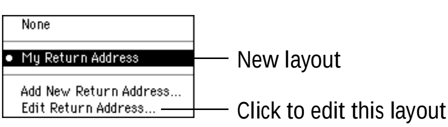
Return address layouts

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.



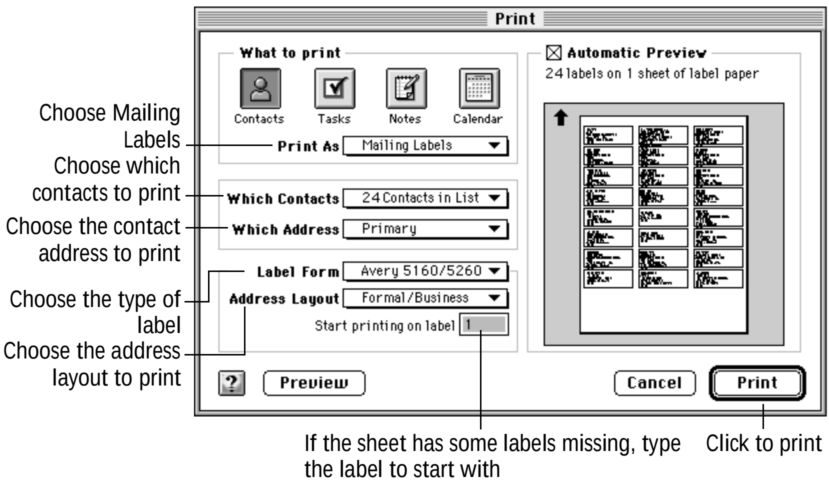
To change or delete a layout or a return address, choose the layout or return address from its pop-up menu, then choose Edit Layout or Edit Return Address from the pop-up menu. Make the changes you want, then click Save. Click the Delete button if you want to delete a layout or return address.

Printing mailing labels

You can print mailing labels for one contact, or a group of contacts, directly. To print a label for one contact, see “Printing a contact card” in this chapter.

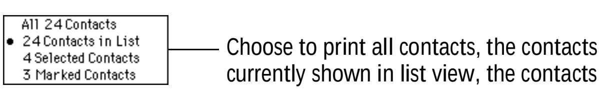
You can choose which contacts you want to print mailing labels for—the entire set, or a smaller group. For more information, see “Selecting items to print” in this chapter.

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

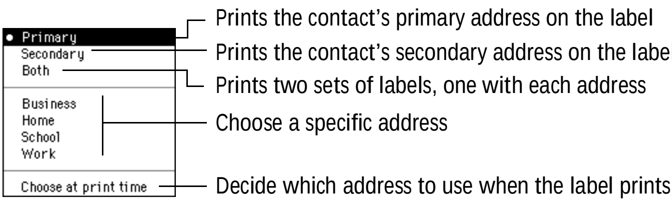


From the Print As pop-up menu, choose Mailing labels.

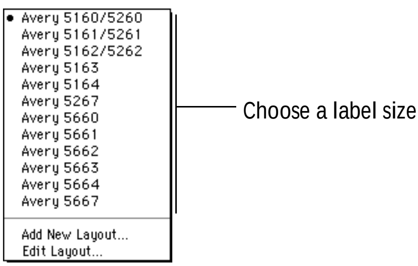
Choose the contacts you want to print mailing labels for from the Which Contacts pop-up menu.



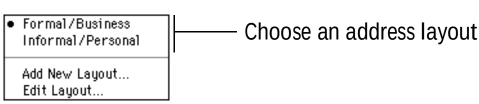
Decide what address you want to use for your mailing labels. “Primary” is the default name for the address on the left side of the contact card, and “Secondary” is the default name for the address on the right. If you have chosen other address names in Contacts preferences, choose that name from the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



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



Choose how you want the contact addresses to appear by choosing from the Address Layout pop-up menu. By default, Formal / Business uses the contact's full name and includes a company name in the address. Informal / Personal uses only the contact'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.



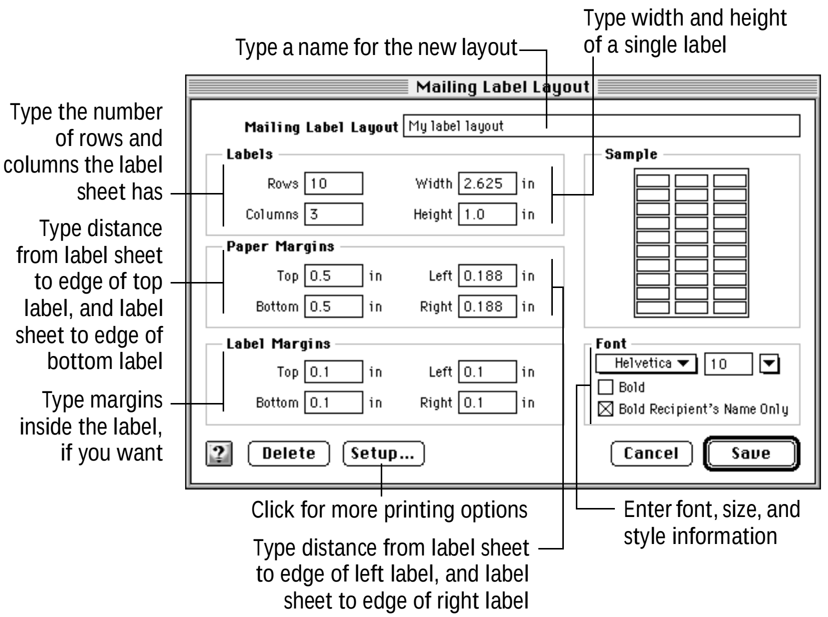
If you are working with a label sheet that has some labels missing, you can type a number into the Start printing on label box to indicate on which label on the sheet printing should begin. To determine the correct number, count the labels across first, then down.

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.

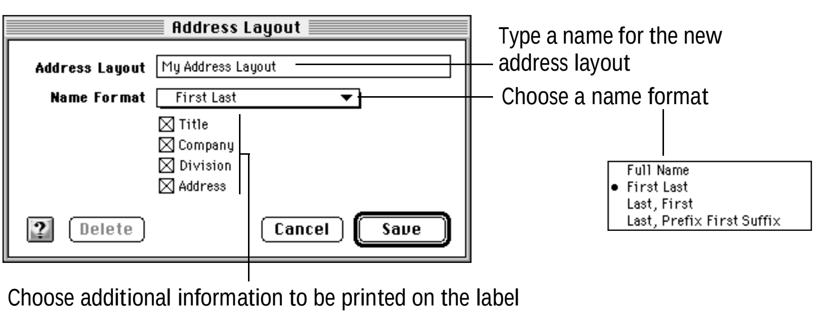
Changing printing layouts for mailing labels

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.

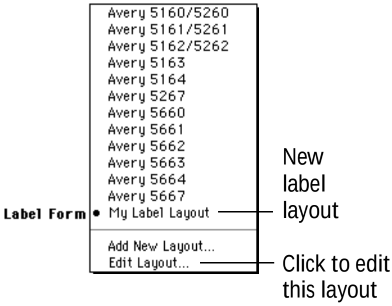


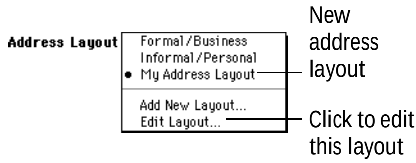
Address layouts

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.





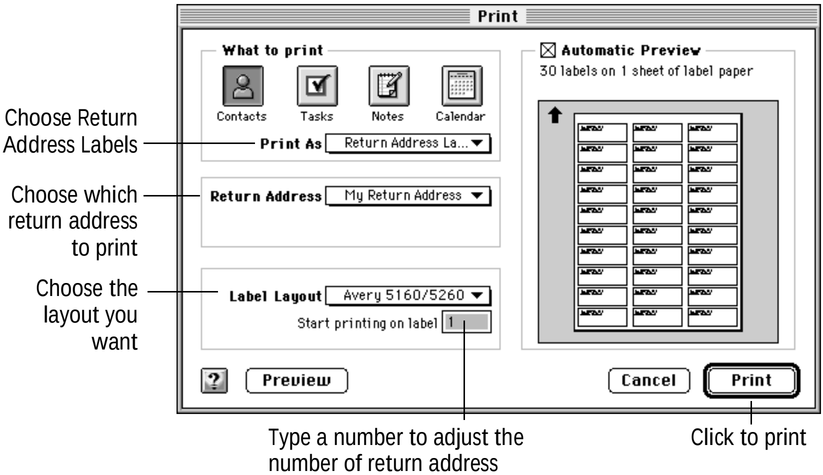
To change or delete a label or address layout, choose the layout from its pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing return address labels

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

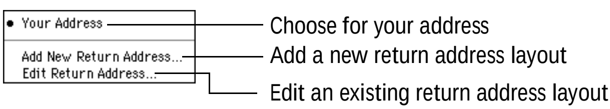
One sheet of return address labels is printed. If you want more than one sheet, type the number of copies you want in your printer's Print dialog box just before you print. For fewer labels, change the number in the "Start printing on label" field until the Preview shows the number of labels you want.

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



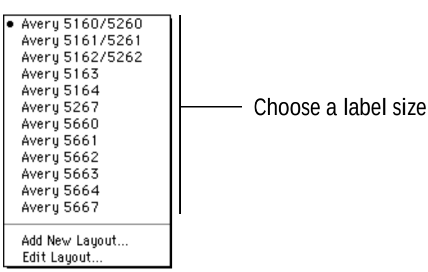
From the Print As pop-up menu, choose Return Address Labels.

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.

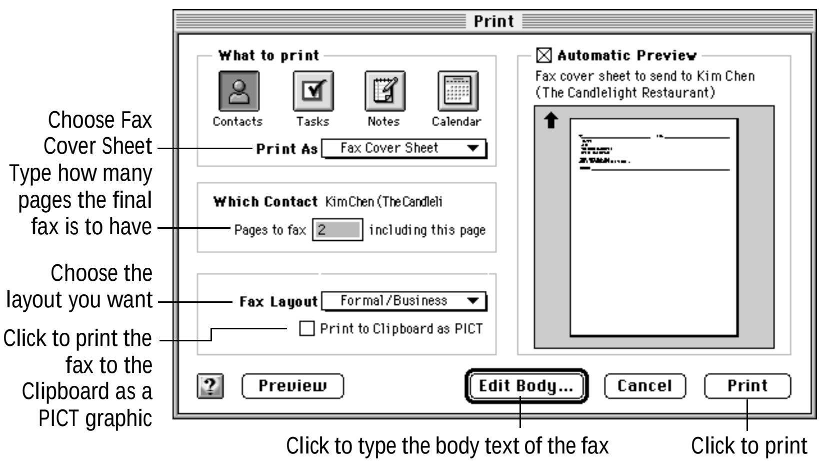
If you are unsure how to print labels, consult the user guide that came with your printer.

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

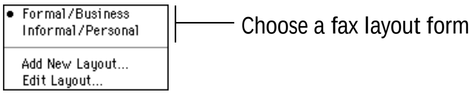
Choose Print from the File menu, or click the Print button on the toolbar. Then click the Contacts button in the Print dialog box.



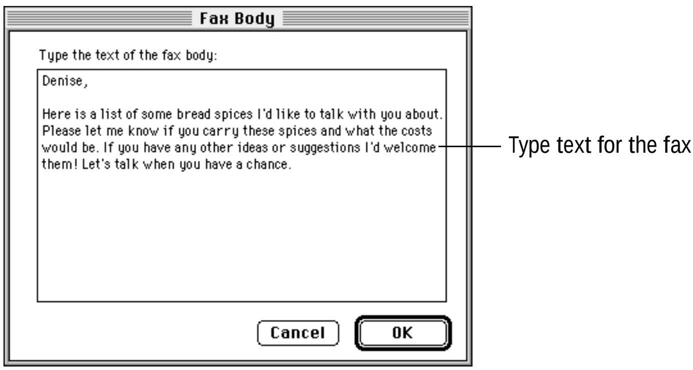
From the Print As pop-up menu, choose Fax Cover Sheet.

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 contact's full name and company name on the fax cover sheet. Informal / Personal uses only the contact'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.

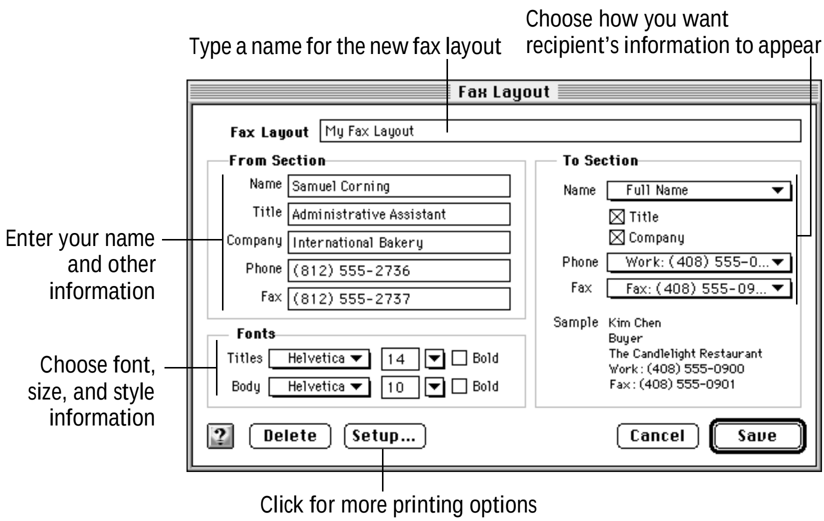


If you want the fax to be sent to the Clipboard as a PICT graphic file, instead of to your printer, select Print to Clipboard as PICT. You can then paste the fax image from the Clipboard into another software application.

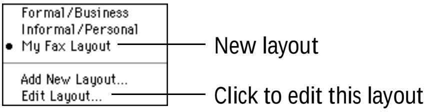
For example, if you have a document created in another software application that you want to fax from your computer, you can create the fax cover sheet, copy the fax cover sheet to the Clipboard, then paste it into the other document.

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.

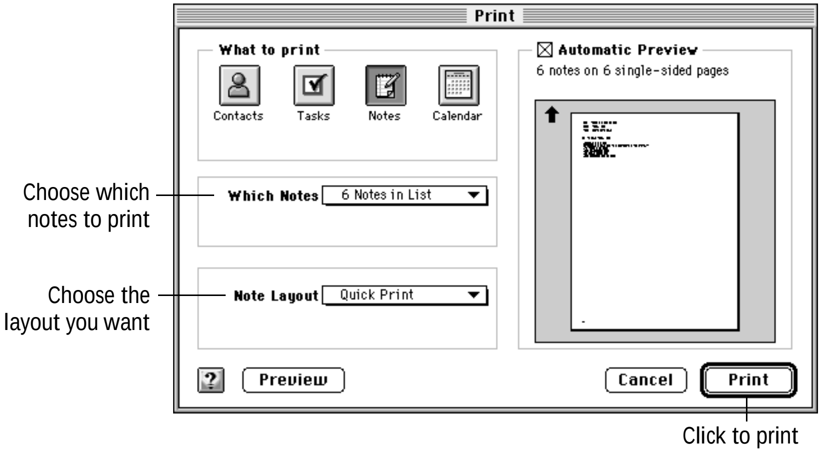


To change or delete a layout, choose it from the Fax Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

Printing notes

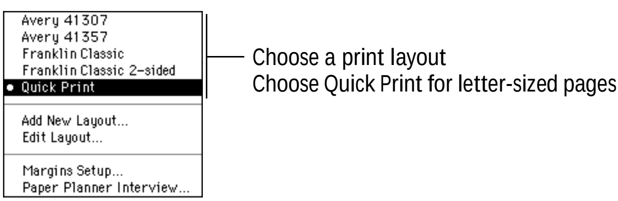
You can choose which notes you want to print—the entire set, or a smaller group. For more information, see "Selecting items to print" in this chapter. You can also print a single note while you are viewing or editing it.

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



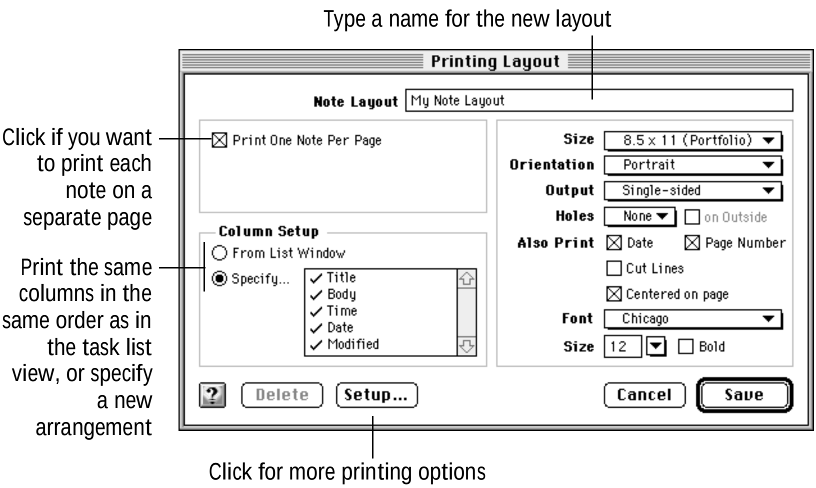
Choose which notes you want to print from the Which Notes pop-up menu.

Choose a layout from the Note Layout menu.

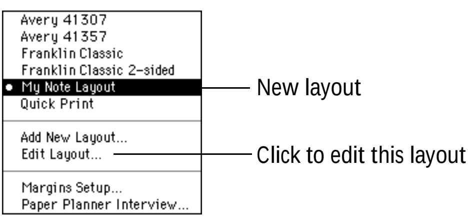


Changing printing layouts for notes

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



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

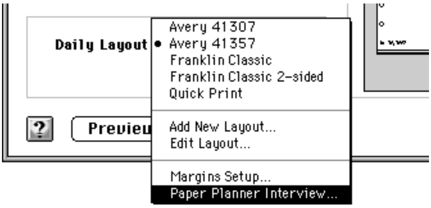


To change or delete a layout, choose the layout from the Note Layout pop-up menu, then choose Edit Layout from the pop-up menu. Make the changes you want, then click Save, or click the Delete button if you want to delete the layout.

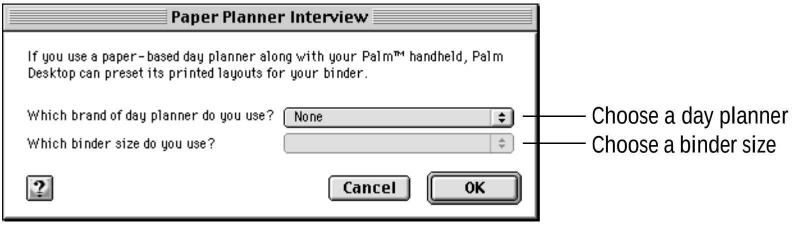
Changing or adding day planner information

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 calendars, contact lists, address books, mini-address books, notes, or task lists.



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



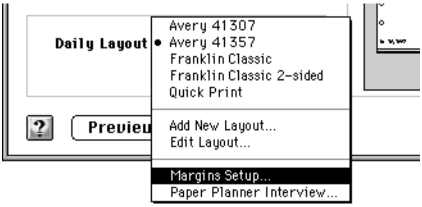
If you have previously selected a paper planner, you are prompted to indicate if you want this new information to replace the old, or be added to it. Click Replace if you are changing day planners, or Add if you want to have a choice of day planner formats.

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

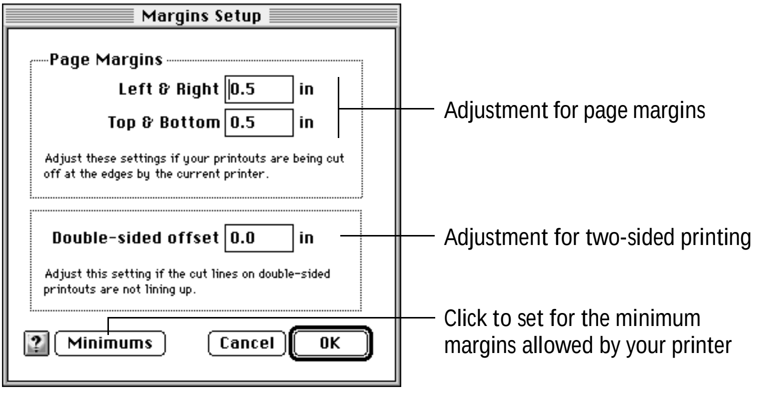
Setting custom margins

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 calendars, contact lists, address books, mini-address books, notes, or task 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.

Chapter 12

Merging Data

When you use both a Macintosh and a Palm Computing® 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 Macintosh and your handheld. In addition, Palm™ Desktop software can merge data between two user data files on the Macintosh.

About user data files

Palm Desktop software stores your calendar, contacts, notes, and tasks in one file on your Macintosh. As described in Chapter 1, you can open one file at a time in Palm Desktop software; we encourage you to maintain one file for each person who uses Palm Desktop software on the same Macintosh. This file is used to synchronize data between your handheld and your Macintosh during a HotSync operation.

The data file is created when you install Palm Desktop software and is located in a folder with the name you set at installation inside the Users folder. For example, if you entered "Jane Garcia" as your user name, the data file is named "User Data" and is located in the folder called "Jane Garcia" in the User folder.

The first time you perform a HotSync operation with your Macintosh and your handheld, the Palm Desktop software 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.

About HotSync operations

A HotSync operation is a two-way exchange of data between your handheld and a Macintosh. Changes that you make on your handheld or your Macintosh are updated on both after a HotSync operation. You can use the same techniques to synchronize data among more than one computer: two Macintoshes, one PC and one Macintosh, and so on.

With HotSync technology, you can

- Synchronize the data from applications on your handheld with the matching applications on your Macintosh, and vice versa. Palm Desktop software is one of many applications that can share data with applications on a handheld.
- Install applications and add data files to your handheld from your Macintosh.
- Manage individual or multiple handhelds with a single Macintosh.
- Keep your data safe by creating backup copies of all your data each time you synchronize.

You can connect your handheld with your Macintosh to perform a HotSync operation in two ways:

- Local HotSync

  Uses the cradle, which connects to the modem or printer port on your Macintosh. For the first HotSync operation, you must perform a local HotSync.
- Modem HotSync

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

These operations are described in detail in the HotSync Manager online help.

For more information

From the Help menu, choose "Search Index for" and type:

- `HotSync Manager`

About synchronizing user data files using HotSync technology

It's most convenient to have all your information in one file. But sometimes it's also useful to have more than one file, for example, one file on an office computer and the other on a portable. Having two files creates the problem of making sure both contain the same information, especially if information is changed independently in each file.

You can use your handheld to make sure multiple files contain the same information. Simply perform HotSync operations with both computers on a regular basis.

You can use your handheld to synchronize files even if one computer is a Macintosh and the other computer is an IBM-compatible running Windows operating system.

The files on the two computers will have the same filename.

Archiving data you delete from your handheld

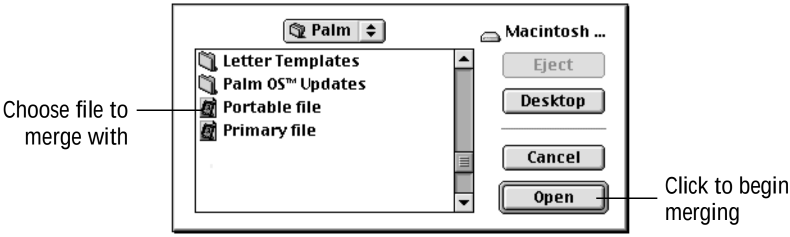
When you delete an item from your handheld, you have the option to have the item archived on your Macintosh during the next HotSync operation. The archive only contains items you delete from the handheld; items deleted from the handheld through synchronization with Palm Desktop software are not archived.

The archive file is named “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 user name, the archive file is located in the folder called “Jane Garcia” in the User folder.

Merging two Palm Desktop files

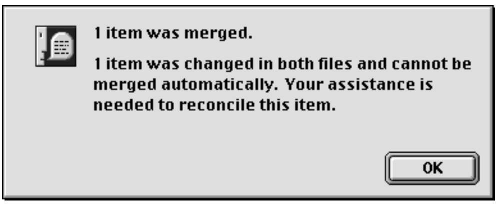
In addition to using a handheld to synchronize data files, you can use the Merge File feature to make sure multiple files contain the same information. Before you can merge two files, you must have the two files either on your hard disk, on a floppy, or accessible through a network. The two files do not need to have the same filename.

To merge one file with another, first open one of the files. Then choose Merge from the File menu. The Open File dialog box appears.



Choose the file you want to merge with, then click Open.

A dialog box opens showing you the progress of the merge. After the two files are merged, a summary appears.



If any conflicts are found, and Palm Desktop software is not able to resolve them, it prompts you for input.

Resolving conflicts

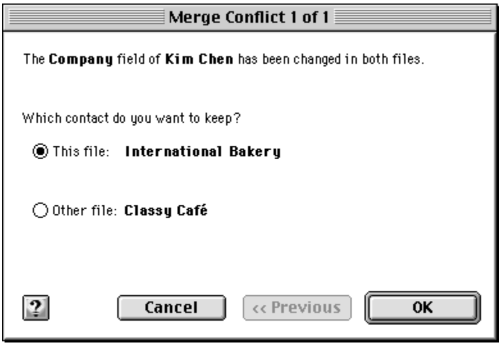
When you synchronize data, whether by performing a HotSync operation or using the file merge feature in Palm Desktop software, the following actions take place:

- If information is in one place and not the other, that information is copied from one place to the other.
- If information has been deleted in one place, it is deleted it in the other.
- If information has been changed in both places, a HotSync operation uses the rules you specify to determine which change it keeps. The file merge process asks you for help resolving the difference.

File synchronization with Palm Desktop software is field-by-field. When synchronizing existing calendar items, contacts, notes, or tasks, the application looks through each field of information in each item. Then, depending on the field, it either takes the more recent of the two fields—or combines information from both.

File merge conflicts

After the two files are merged, you may be prompted for help resolving data conflicts. Click OK in the merge report message box. You see a description of the specific conflict.



Determine which action to take, then click the Next button to finish merging the files. When there are no more conflicts to resolve, click OK.

Chapter 13

Using the Instant Palm™ Desktop Menu

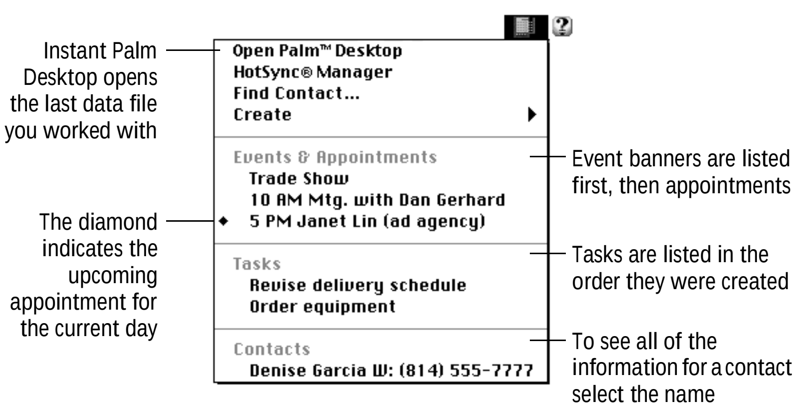
This chapter explains the basics of using the Instant Palm™ Desktop menu.

About the Instant Palm Desktop menu

The Instant Palm Desktop menu icon appears in the top right corner of the screen to the left of the menu in the menu bar.

In the Instant Palm Desktop menu you can:

- See your appointments, events, and tasks for the current day without starting Palm™ Desktop software
- Show designated contact names and phone numbers, and dial phone numbers
- Quickly start Palm Desktop software or switch to it from another application
- Search for contacts without starting Palm Desktop software
- Create appointments, tasks, contacts, notes, and event banners without starting Palm Desktop software



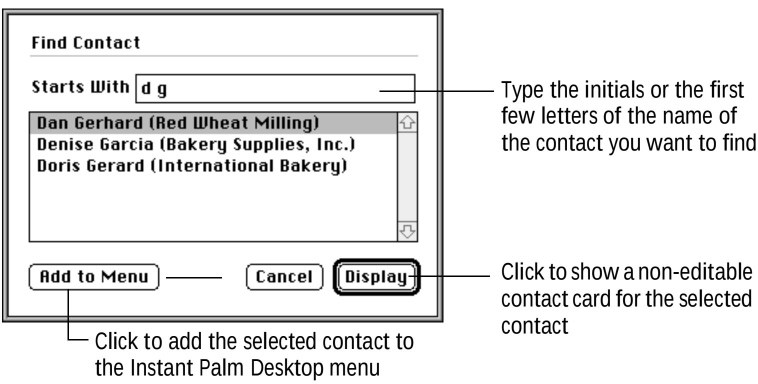
Note The Instant Palm Desktop menu is controlled by the Instant Palm Desktop extension, which is automatically copied to the Extensions folder inside your System Folder when you install Palm Desktop software.

Working with contacts

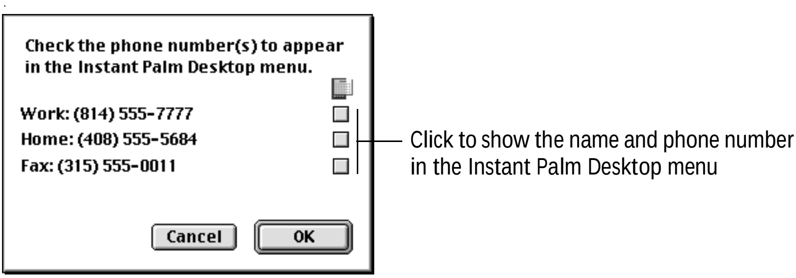
In the Instant Palm Desktop menu, you can search for and display contacts, and add their names and phone numbers to the menu.

Note For more information about setting up for dialing telephone numbers, see “Setting dialing preferences” in Chapter 3.

Choose Find Contact from the  menu to search for contacts. The Find Contact dialog box appears.



When you click Add to Menu, you see a dialog box similar to the one below.

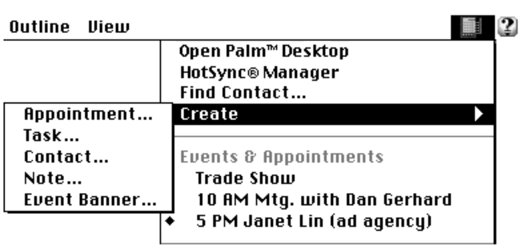


When you click Display in the Find Contact dialog box, you see a non-editable version of the contact card.

To remove a contact from the Instant Palm Desktop menu, display the appropriate contact card and deselect the checkbox next to the phone number. You can do this from either the Instant Palm Desktop contact card or the contact card in Palm Desktop software.

Creating items from the Instant Palm Desktop menu

You can create an appointment, task, contact, note, or event banner directly from Instant Palm Desktop. Choose Create from the menu, and then choose the type of item you want to create from the submenu.



Appendix A

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.

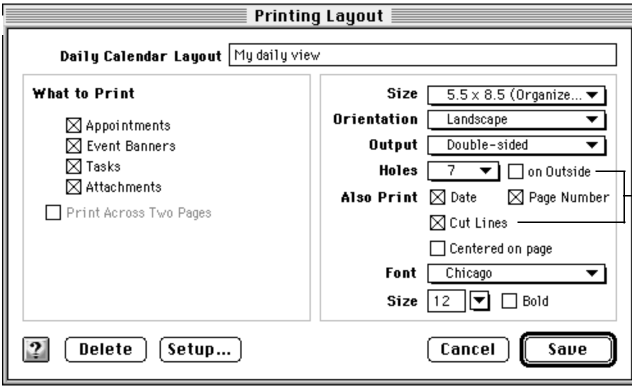
This appendix shows you how to print double-sided pages. Read the section for your particular printer. If there is no section for your printer, see the user's guide that came with your printer or consult your printer's manufacturer.

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, 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

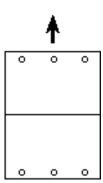
Apple LaserWriter/LaserWriter Plus, Hewlett-Packard DeskWriter

For the DeskWriter, LaserWriter, and LaserWriter Plus, these are the general steps:

- Print one side of the page
- Reverse the order of the pages
- Print the other side of the page

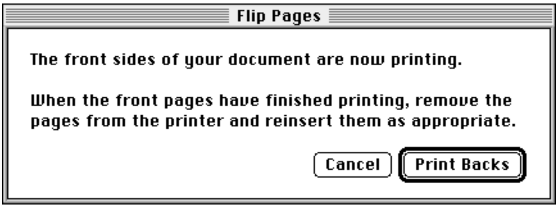
Follow the instructions in Chapter 11 for printing. Follow these steps after printing has begun:

1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.



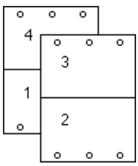
Edge with the holes enters the printer first

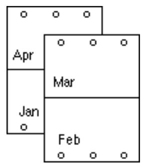
The printed pages come out of the printer in reverse order and printed side up. The first page printed (for example, January / April or the A's if you're printing contacts) is at the bottom of the stack.



While the first side is printing, you see a message on the screen.

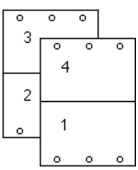
2. Wait until all the pages have printed and then remove the printed pages.

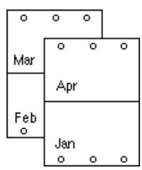




3. Reverse the order of the pages.

   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.





4. Insert the pages back into the paper tray, printed side up.
5. Click Print Backs.

Apple Personal LaserWriter, Hewlett-Packard LaserJet IIP and IIIP

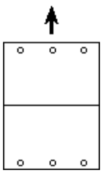
For the LaserJet IIP / IIIP and the Personal LaserWriter SC / NT / LS, these are the general steps:

- 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:

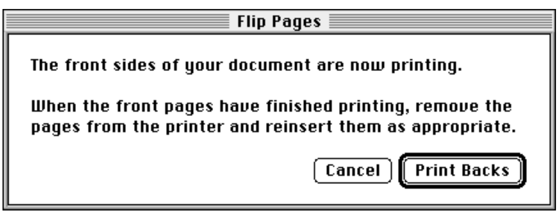
1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.



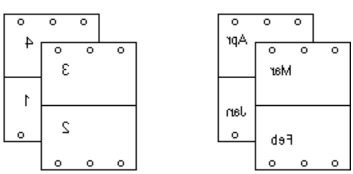
Edge with the holes enters the printer first

The printed pages come out of the printer 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 contacts) is at the bottom of the stack.

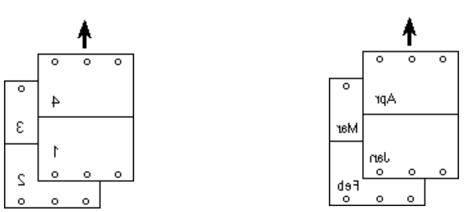
While the first side is printing, you see a message on the screen.



2. Wait until all the pages have printed and then remove the printed pages.



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

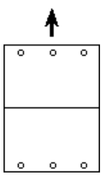
For the LaserJet III / IIID and the LaserWriter II SC / NT / NTX / F / G, these are the general steps:

- 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.

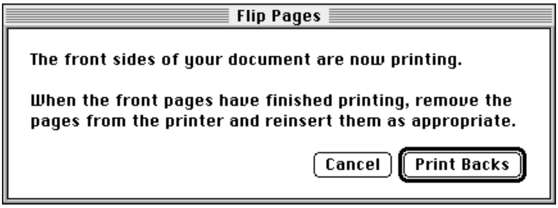
Follow the instructions in Chapter 11 for printing. Follow these steps after printing has begun:

1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.

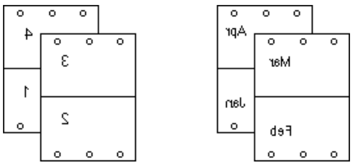


The printed pages come out of the printer with the first page at the bottom of the stack and the printed side down. The first page printed (for example, January / April or the A's if you're printing contacts) is at the bottom of the stack.

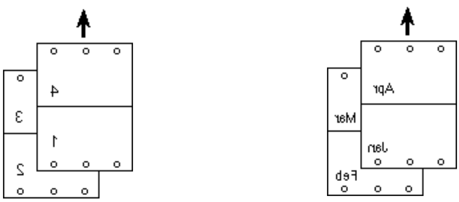
While the first side is printing, you see a message on the screen.



2. Wait until all the pages have printed and then remove the printed pages.



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.

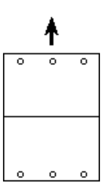
Apple LaserWriter Pro 630 and 16/600PS

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:

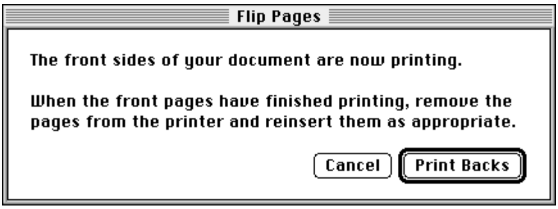
1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.



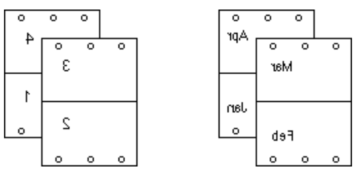
Edge with the holes
enters the printer first

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 contacts) is at the bottom of the stack.

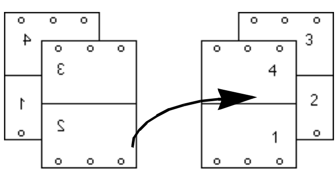
While the first side is printing, you see a message on the screen.



2. Wait until all the pages have printed and then remove the printed pages.

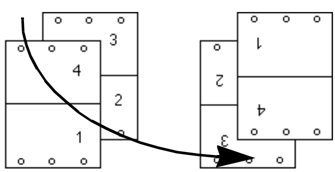


3. Flip over the stack so that the first page that was printed is at the top of the stack.



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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