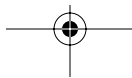
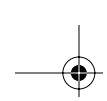


pdQ Applications Handbook



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5,437,055, D361,065, 5,442,322, 5,442,627, 5,452,473, 5,461,639,
5,469,115, 5,469,471, 5,471,497, 5,475,870, 5,479,475, 5,483,696,
5,485,486, 4,487,175, 5,490,165, 5,497,395, 5,499,280, 5,504,773,
5,506,865, 5,509,015, 5,509,035, 5,511,067, 5,511,073, 5,513,176,
5,515,177, 5,517,323, 5,519,761, 5,528,593, 5,530,928, 5,533,011,
5,535,239, 5,539,531, 5,544,196, 5,544,223, 5,546,459, 5,548,812,
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5,566,357, 5,568,483, 5,574,773, 5,574,987, D375,740, 5,576,662,
5,577,022, 5,577,265, D375,937, 5,588,043, D376,804, 5,589,756,
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5,604,730, 5,608,722, 5,614,806, 5,617,060, 5,621,752, 5,621,784,
5,621,853, 5,625,876, 5,627,857, 5,629,955, 5,629,975, 5,638,412,
5,640,414, 5,642,398, 5,644,591, 5,644,597, 5,646,991, 5,652,814,
5,656,979, 5,655,229, 5,657,420, 5,659,569, 5,663,807.

Other patents pending.

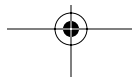
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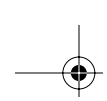
Operation is subject to the following two conditions: (1) This device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation.

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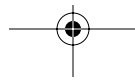
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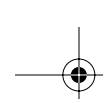
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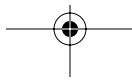
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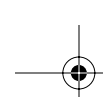
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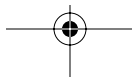
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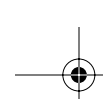
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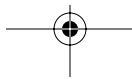
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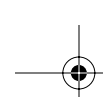
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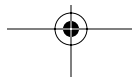
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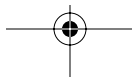
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Chapter 1

Address Book



Use the Address Book to maintain names, addresses, phone numbers, e-mail addresses, URLs, and other information about contacts.

With the Address Book, you can:

- Tap a phone number from the Address List to make a phone call directly.
- Look up or enter names, addresses, phone numbers and other information.
- Enter up to five phone numbers or e-mail addresses for each contact.
- Define which phone numbers appear in the Address List screen for each Address Book entry.
- Attach a note to each Address Book entry where you can enter additional information about the entry.
- Assign categories to your Address Book entries, so you can quickly sort and view your entries in logical groups.
- Define the contacts to include in the Speed Dialer list.

To open the Address Book:

- 1 Open the keypad, then tap to open the Applications Launcher.
- 2 Tap to display the Address Book list.




Getting Started with Address Book Entries

Getting Started with Address Book Entries



An Address Book entry is where you store name and address information about people or businesses. pdQ smartphone makes it easy to create, edit and delete Address Book entries.

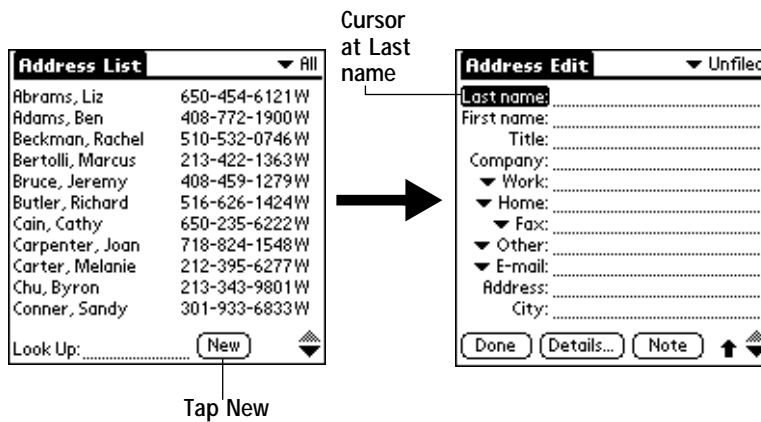
Creating an Address Book Entry

You can create Address Book entries on pdQ smartphone, or you can use the Palm™ Desktop software to create Address Book entries on your computer and download the entries to pdQ smartphone with the next HotSync® operation. See the “HotSync” chapter for details.


 The Palm Desktop software also has data Import capabilities that allow you to load database files into pdQ smartphone's Address Book. Refer to the online documentation supplied with the Palm Desktop software for details.

To create a new Address Book entry:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Address List screen.
- 3 Tap New to display the Address Edit screen.




- 4 Enter the last name of the person you want to add to your Address Book.


 pdQ smartphone automatically capitalizes the first letter of each field (except *numeric* and e-mail fields). You do not have to use the Graffiti® capital stroke to capitalize the first letter of the name.

- 5 Use the Next Field Graffiti stroke to move to the First Name field.

Getting Started with Address Book Entries




 You can also move to any field by tapping it directly.

- 6 Enter the person's first name in the First Name field.
- 7 Repeat steps 4 and 5 to enter the other information that you want to include in this Address Book entry.
- 8 Tap  to move to the next page.
- 9 Tap Done to return to the Address List screen when finished.

Address Book







Tap Done

 You can create an Address Book entry that always appears at the top of the list by beginning the Last name (or Company name) field with a blank space.

Adding an Address Book Entry to the Speed Dialer

To add an Address Book entry to the Speed Dialer list:



- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Address List screen.
- 3 Tap the line that contains the contact information you want to add to the Speed Dialer list, then tap Edit.
- 4 Tap the plus sign (+) that appears to the right of the phone number you want to add to the Speed Dialer list, then tap Done.
- 5 Tap  to open the Applications Launcher.
- 6 Tap  to confirm the new Speed Dialer list entry.

Getting Started with Address Book Entries

Making a Phone Call from the Address Book

After you create an Address Book entry, you make a phone call from it directly.

To make a phone call from the Address Book:

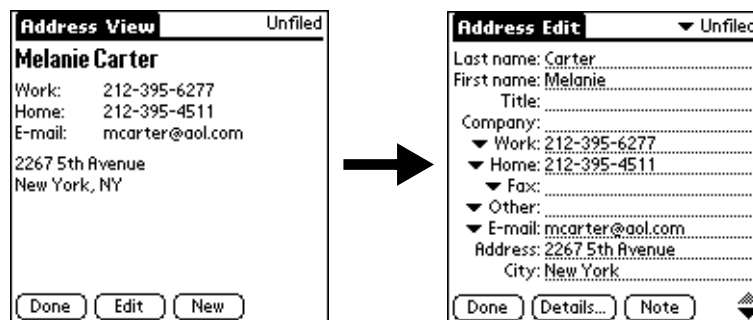
- 1 Open the keypad, then tap  to turn on the phone.
- 2 Tap  to display the Address List screen.
- 3 Tap the phone number you want to call, then tap Dial.
- 4 Tap End when finished.

Editing an Address Book Entry

After you create an Address Book entry, you can update it or enter additional information any time.

To edit an Address Book entry:

- 1 Tap the Address Book entry that you want to change to display the Address View screen for that entry.
- 2 Tap Edit (or anywhere on the screen) to display the Address Edit screen.



- 3 Tap any field (such as Address or City) and enter or change the information.
- 4 Tap Done to return to the Address List screen when finished.

Deleting an Address Book Entry

There are two ways to delete an entry: use the Menu Commands (described in the "Record Menu" section of this chapter) or use the Address Entry Details dialog.

To delete an entry with the Address Entry Details dialog:




- 1 Tap the Address Book entry that you want to delete to display the Address View screen for that entry.

Working With Address Book Entries

- 2 Tap Edit to display the Address Edit screen.
- 3 Tap Details to open the Event Details dialog.
- 4 Tap Delete to open the Delete Address alert.
- 5 Tap OK to confirm you want to delete the entry.

Removing an Address Book Entry from the Speed Dialer

To remove an Address Book entry from the Speed Dialer:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Address List screen.
- 3 Tap the line that contains the contact information you want to remove from the Speed Dialer list, then tap Edit.
- 4 Tap the minus sign (-) that appears to the right of the phone number you want to remove from the Speed Dialer list, then tap Done.
- 5 Tap  to open the Applications Launcher.

Address Book

Working With Address Book Entries


pdQ smartphone enables you to quickly find your Address Book entries, group them by category, and display the entries by name or company name. You can also choose the type of information you want your entries to include and exchange Address Book information with other pdQ smartphone users.

Looking Up Address Book Entries

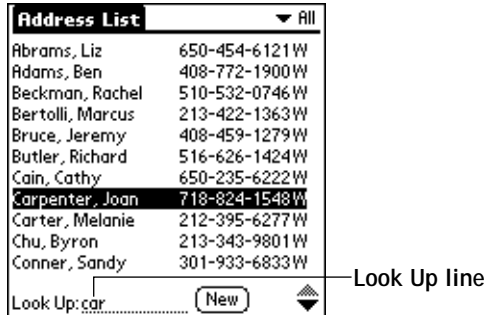
When working with the Address Book, the scroll button on the front panel of pdQ smartphone makes it easy to navigate among your address entries. In the Address List screen, the scroll button moves up or down an entire screen of address entries. If you hold down the scroll button, you accelerate the scrolling so that it displays every third screen. In the Address View screen, the scroll button moves to the previous or next address entry.


You can also use the Address List Look Up feature to quickly scroll to any of your Address Book entries.

To look up an Address Book entry:

- 1 Tap  to display the Address List screen from the Applications Launcher.
- 2 Enter the first letter of the name you want to find.

Working With Address Book Entries



 The letter appears on the Look Up line and the list scrolls to the first entry that begins with that letter. If you write another letter, the list scrolls to the first entry that starts with those *two* letters. For example, writing an “s” might scroll to “Sands,” and writing “sm” might scroll further to “Smith.” If you sort the list by company name, the Look Up feature scrolls to the first letter of the company name.

- 3 Tap any entry to view its contents, or use the carriage return stroke to view the selected entry.

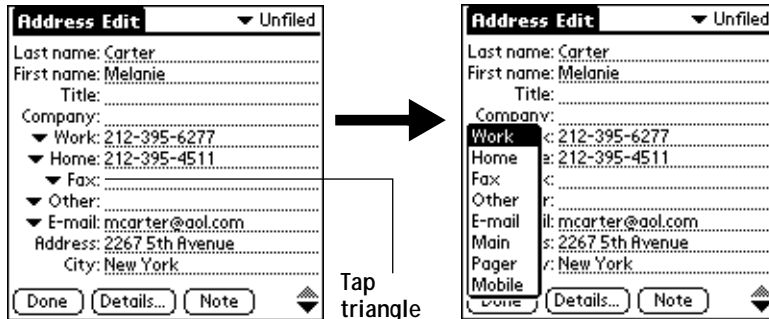
Choosing Types of Phone Numbers

pdQ smartphone enables you to choose the types of phone numbers or e-mail addresses that you associate with an Address Book entry. Any changes you make will apply only to the current Address Book entry.

To choose other types of phone numbers in an Address Book entry:

- 1 Tap the Address Book entry that you want to change to display the Address View screen for that entry.
- 2 Tap Edit to display the Address Edit screen for that entry.
- 3 Tap ▼ for the label you want to change.

Working With Address Book Entries



- 4 Tap the new label you want to use.

Assigning Address Categories

Categories can help you file individual Address Book entries into groups for easy review. You can assign and edit categories in the Address Book or by using the Categories pick list in the Details dialog (see "Using Categories" in the *pdQ Basics Handbook* for a complete description of categories).



To assign a category to an Address Book entry:

- 1 Tap the Address Book entry you want to assign to a category.
- 2 Tap Edit in the Address View screen to display the Address Edit screen.
- 3 Tap ▼ in the upper-right corner for the category you want to assign to the Address Book entry.

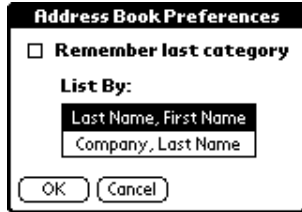
Sorting by Name or Company

You can sort the entries in the Address List screen by Company and Last Name, rather than by Last Name and First Name. These settings do not change your Address Book data in any way; they merely change the view.

To sort the entries in the Address List screen:

- 1 Tap  to open the Address List screen.
- 2 Tap  to open the Address Book menus.
- 3 Tap Preferences from the Options menu to open the Address Book Preferences dialog.

Working With Address Book Entries



- 4 Tap the setting that you want for the Address List screen.
- 5 Tap OK to display the Address List screen with your new setting.



Entries with no company name sort by last name.

Changing Address Entry Details

The Address Entry Details dialog provides a variety of options that you can associate with an Address entry.

To open the Address Entry Details dialog:

- 1 Tap an Address Book entry to display the Address View screen for that entry.
- 2 Tap Edit to display the Address Edit screen.
- 3 Tap Details to open the Address Entry Details dialog.




- 4 Select any of the following settings:

- Show in List** Choose the information that appears for the current entry in the Address List screen. Choose from: Work, Home, Fax, Other and E-mail.
- Category** Assign the entry to one of these categories: Business, Personal, QuickList, Unfiled and Edit Categories.
- Private** Hide this entry when security features are turned on.


Beaming Address Entries to Other pdQ Smartphones

The IR port on pdQ smartphone enables you to beam Address Book entries to other pdQ smartphones. You can beam any of the following:


- **Business card** A specially designated entry containing information you want to exchange with business contacts. You can send your business card quickly with one-touch beaming.
- **Current address entry** The entry currently selected on pdQ smartphone. For example, you may want to beam the name of a business contact to a coworker who also uses a pdQ smartphone.
- **Category of address entries** All of the entries that you have assigned to the selected category. For example, you might want to share your list of restaurants with a friend.



 For more on the IR port, see "Beaming Information to Other pdQ Smartphones" in the *pdQ Basics Handbook*.

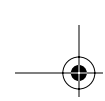
To select a business card:

- 1 Create an Address Book entry containing the information you want on your business card.
- 2 Tap your business card entry to display the Address View screen for that entry.
- 3 Tap  to open the Address Book menus.
- 4 Tap Select Business Card from the Record menu, and tap Yes to accept this entry as your business card.

To beam a business card:


- 1 Tap your business card entry to display the Address View screen for that entry.
- 2 Tap  to open the Address Book menus.
- 3 Tap Beam Business Card from the Record menu to beam your card to another pdQ smartphone.

 You can also press  for about two seconds to beam your card.



Address Book Menu Commands


To beam the current entry:

- 1 Tap an Address Book entry that you want to beam to display the Address View screen for that entry.
- 2 Tap  to open the Address Book menus.
- 3 Tap Beam Address from the Record menu to beam the current entry to another pdQ smartphone through the IR port.



You can set the full-screen pen stroke to beam the current entry. See "Pen Preferences" for details.

To beam the current category:

- 1 Display the Address List screen.
- 2 Tap the ▼ in the upper-right corner for the category you want to beam to display the entries in that category.
- 3 Tap  to open the Address Book menus.
- 4 Tap Beam Category from the Record menu to beam the entries in the current category to another pdQ smartphone through the IR port.

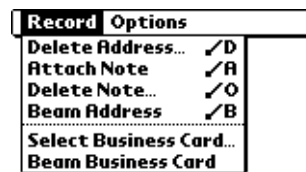
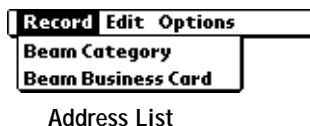
Address Book Menu Commands

The Address Book includes menu commands to make it fast and easy to perform common file and editing tasks. This section explains the menu commands that are specific to the Address Book.

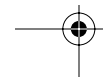
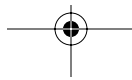
Refer to "Using Menus" in the *pdQ Basics Handbook* for information about menu commands common to pdQ smartphone applications.

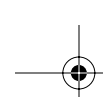
Record Menu

When you select the Record menu, its commands appear on the screen. The menu commands are slightly different depending on the current screen.



Address View





Address Book Menu Commands

Delete Address Opens an alert dialog prompting you to confirm deletion of the current entry. Tap OK to delete the entry from pdQ smartphone, or tap Cancel to close the alert dialog and keep the entry.

By default, pdQ smartphone removes the entry from the Address Book, but retains a copy of the entry and transfers it to an archive file on your computer the next time you perform HotSync. To remove the entry completely, clear the Save archive copy on PC check box.

Attach Note Opens the Address Book Note dialog where you can create a Note for the current entry.

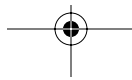
Delete Note Opens an alert dialog prompting you to confirm deletion of the Note attached to the entry. Tap OK to delete the Note, or tap Cancel to close the alert dialog and keep the note.

Beam Address Beams the current Address Book entry to another pdQ smartphone through the IR port.

Beam Category Beams all Address Book entries in the current category to another pdQ smartphone through the IR port.

Select Business Card Enables you to select the current Address Book entry as your business card. To beam your business card to other pdQ smartphones, use the Beam Business Card command.

Beam Business Card Sends the current business card to another pdQ smartphone through the IR port. You can also initiate this command by holding down the Address Book button for at least two seconds. This is a convenient way to exchange business cards with other pdQ smartphone users.



Address Book Menu Commands

Options Menu

When you select the Options menu, its commands appear on screen.



Address List



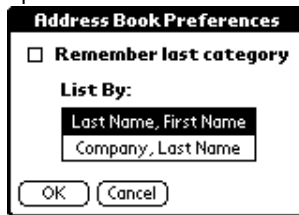
Address View

Font

Opens the Select Font dialog where you can choose a different font (text) style for your Address Book entries. See "Choosing Fonts" in the *pdQ Basics Handbook* for details.

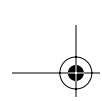
Preferences

Opens the Address Book Preferences dialog.



Remember last category Determines how the Address Book appears when you return from another pdQ smartphone application (Memo Pad, To Do List, etc.). If you select this check box, the Address Book shows the last category you selected. When you clear it, the Address Book shows the address entries for all categories.

List By Determines whether address entries sort by last name, first name or by company name, last name in the Address List screen.



Address Book Menu Commands

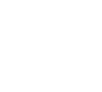
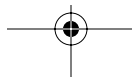
Rename Custom Fields

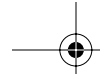
Enables you to define custom field names. Each Address Book entry contains four "custom fields" that you can rename. Any changes you make to the names of the custom fields appear in all of your Address Book entries.



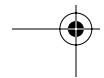
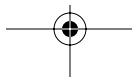
About Address Book

Shows version (revision) information for the Address Book application.






Address Book Menu Commands





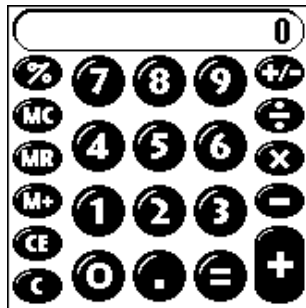
Chapter 2

Calculator

 The Calculator enables you to perform basic calculations. You can also store and retrieve values in the Calculator's memory.

To open the Calculator:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Calculator.



Calculator

Using the Calculator Screen



The Calculator is designed to perform addition, subtraction, multiplication and division operations.

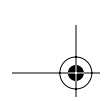
To use the Calculator screen:

- ▶ Use your fingers or the stylus to tap the Calculator buttons that appear on the screen.





Special Calculator Buttons

The Calculator includes several buttons to help you perform calculations.

-  Clears the last number you entered. Use this button if you make a mistake while entering a number in the middle of a calculation. This button allows you to re-enter the number without starting over.
-  Clears the entire calculation and allows you to begin a fresh calculation.



Calculator Menu Commands

-  Toggles the current number between a negative and positive value. If you want to enter a negative number, enter the number first *and then press* the +/- button.
-  Places the current number into Memory. Each new number you enter with the M+ button is *added to the total* already stored in memory. The number that you add can be either a calculated value, or any number you enter by pressing the number buttons. Pressing this button has no effect on the current calculation (or series of calculations); it merely places the value into memory until it is recalled.
-  Recalls the stored value from memory and inserts it in the current calculation.
-  Removes any value that is stored in the Calculator memory.


Calculator Menu Commands

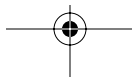
The Calculator supports the Copy and Paste commands. You can use these commands to copy a value from the Calculator and paste it into another application on pdQ smartphone. Similarly, you can copy values from other applications on pdQ smartphone, such as Expense, and paste the values into the Calculator. For additional information on the Copy and Paste commands, see “Using Menus” in the *pdQ Basics Handbook*.

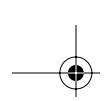
Recent Calculations

The Recent Calculations command enables you to review the last series of calculations, and is particularly useful for confirming a series of “chain” calculations.

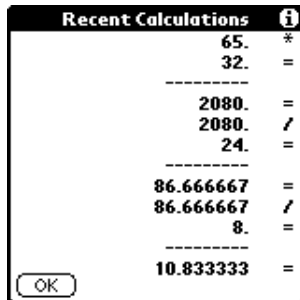
To display the recent calculations:

- 1 Tap  to open the Calculator menus.
- 2 Tap Recent Calculations from the Options menu to display the Recent Calculations screen.

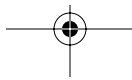
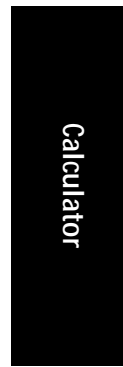




Calculator Menu Commands

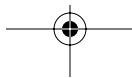


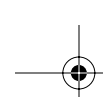
- 3 After you finish reviewing the dialog, tap OK to close the Recent Calculations dialog and return to the Calculator.





Calculator Menu Commands





Chapter 3

Call History



Call History maintains a list of up to 99 incoming, outgoing, and missed calls. To ensure the list does not exceed 99 entries, pdQ smartphone automatically replaces older entries with new entries. You must have had incoming or outgoing calls in order for Call History to contain information.

Call History:

- Organizes calls into three categories: Incoming, Outgoing and Missed.
- Displays information about each call by individual category or by all categories at one time.
- Sorts calls by column heading (Who, Date, Length) for each category.



To open Call History:

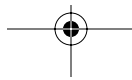
- ▶ Open the keypad, then tap  to open the Call History list.

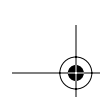
Call History			▼ All
Who	Date	Length	
6518888	10/6 9:04a	01:38	
6518888	10/6 9:03a	00:28	
- unknown -	10/6 10:27a	00:00	

Call History

To make a call from the Call History list:

- 1 Open the keypad, then tap  on pdQ smartphone's screen to turn on the phone.
- 2 Tap  to open the Call History list.
- 3 Tap the entry you want to call, then tap Dial.






To copy information about a call from Call History to the Address Book:

- ▶ Tap the entry you want to add to the Address Book, then follow the instructions on the screen.

To delete one entry from the Call History list:

- ▶ Tap the entry you want to delete, then tap Delete.

To delete all entries from the Call History list:

- 1 Tap  from the Call History list.
- 2 Tap Delete All from the Record menu.

To sort Call History list entries by column heading:

No matter which sort sequence you choose, new calls automatically appear at the top of the list.

- ▶ Tap Who to sort the list in numeric-alphabetic sequence. Tap Who again to resort the list in alphabetic-numeric sequence.

or


Tap Date to sort the list in the most recent date-most recent time sequence. Tap Date again to resort the list based on the most recent time.

or

Tap Length to sort the list in the longest call-shortest call sequence. Tap Length again to resort the list in the shortest call-longest call sequence.



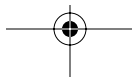
To define Call History preferences:

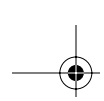
- 1 Tap  from the Call History list.
- 2 Tap Preferences from the Options menu.
- 3 Tap the appropriate checkbox.

Don't show name in summary Select to ensure that caller names do not appear in the Who column even if the information is available.

Delete calls after ___ days Select to delete Call History list entries based on the number of days indicated.

- 4 Tap OK when finished.





Chapter 4

Date Book



The Date Book enables you to quickly and easily schedule appointments or any kind of activity associated with a specific time and date.

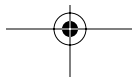
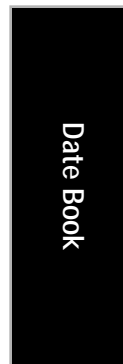
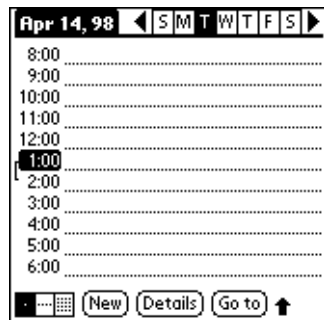
With the Date Book, you can:

- Enter a description of your appointment and assign it to a specific time and date.
- Display a chart of your appointments for an entire week. The Week View feature makes it easy to spot any potential scheduling overlaps or conflicts.
- Display a monthly calendar to quickly spot days where you have morning, lunch or afternoon appointments.
- Set an alarm to sound prior to a scheduled activity.
- Create reminders for events that are based on a particular date, rather than time of day. Birthdays and anniversaries are easy to track with your pdQ smartphone.
- Attach notes to individual events for a description or clarification of the entry in your Date Book.



To open the Date Book:

- 1 Open the keypad, then tap to open the Applications Launcher.
- 2 Tap to display the Date Book screen.



Scheduling an Event

Scheduling an Event

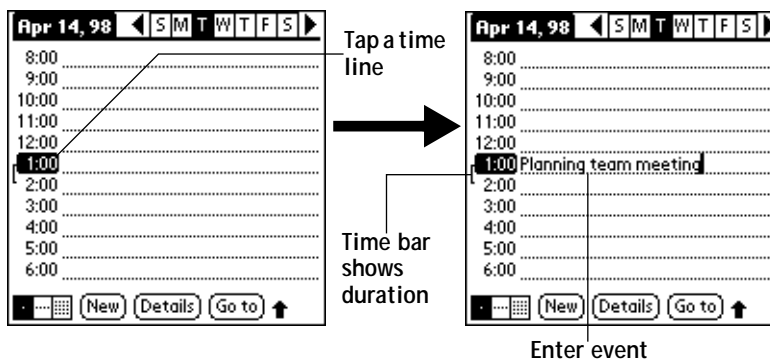
An event can be any kind of activity that you schedule for a particular day. When the Date Book screen first appears, it shows the current date () and a list of times for a normal business day. You can enter a new event on any of the available time lines.

When you create an event, its description appears on the time line, and its duration is automatically set to one hour. You can easily change the start time and duration for any event.


You can also include events in your Date Book that occur on a particular date but have no specific start or end times, such as birthdays, holidays and anniversaries. These are referred to as untimed events. Untimed events appear at the top of the Date Book screen and are noted by a diamond. You can have several untimed events on a particular date.

To schedule an event for the current day:

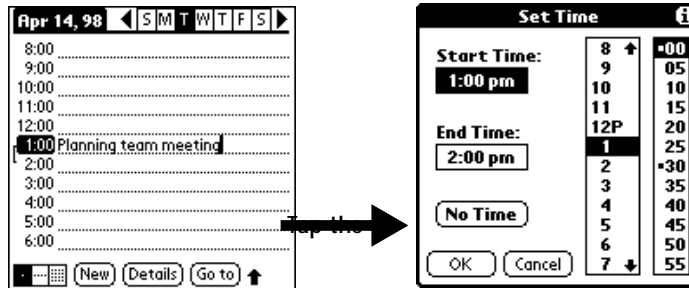
- 1 Tap the time line that corresponds to your event in the Date Book screen.



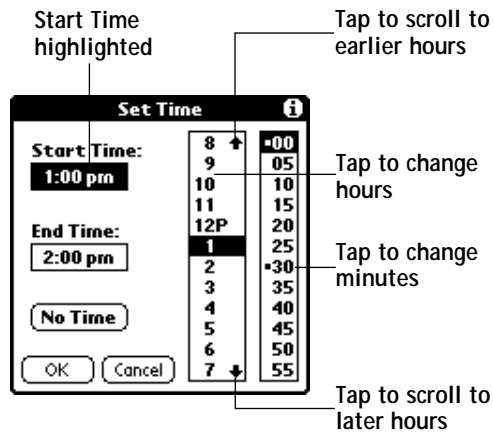
- 2 Enter information about the event.
- 3 If your appointment is longer or shorter than an hour, tap the time of the event to open the Set Time dialog. If your appointment is one hour long, skip to step 7.

 You can also open the Set Time dialog (to select a start time) by making sure no event is selected, then writing a number on the number side of the Graffiti writing area.

Scheduling an Event



- 4 Tap the time columns on the right side of the Set Time dialog to set the Start Time.



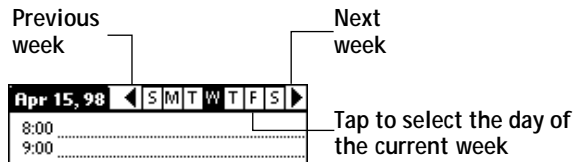
- 5 Tap the End Time box, then tap the time columns to set the End Time.
- 6 Tap OK to confirm your selection and close the Set Time dialog.
- 7 Tap a blank area of the screen to de-select the event. A vertical line appears next to the time, indicating the duration of the event.

Scheduling an Event

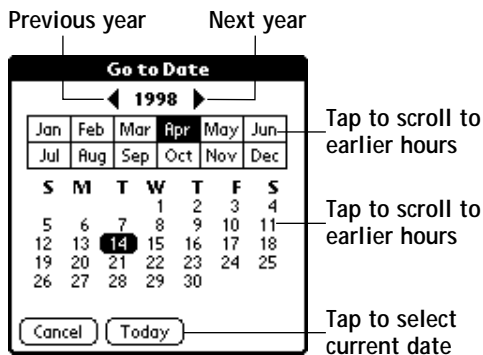
To schedule an event for another day:

Select the date you want for the event by doing one of the following:

- Tap the day of the week that you want in the Date Bar at the top of the Date Book screen. Tap the Previous week or Next week scroll bars to move to another week.



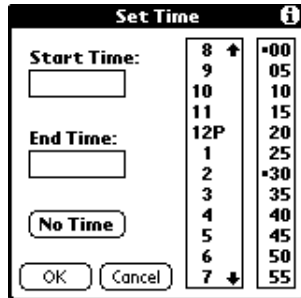
- Tap Go To to open the Go to Date dialog. Select a date by tapping a year, month and day in the calendar.




- Tap the scroll button to scroll to another day. Press the upper half of the button to move to the previous day or the lower half to move to the next day.
- After you locate the date, follow the steps described in the previous section, "To schedule an event for the current day."

To schedule an untimed event:

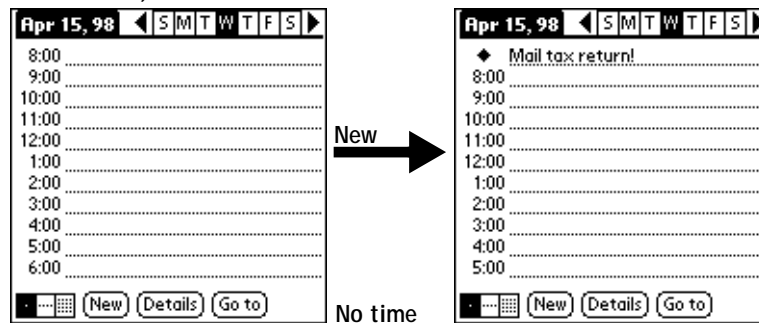
- 1 Select the date that you want for the event as described in the previous section, "To schedule an event for another day."
- 2 Tap New to open the Set Time dialog.




3 Tap OK, so that no start or end times are defined for the new event.

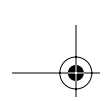
 You can also create a new untimed event by making sure no event is selected, then writing letters in the Graffiti writing area.

4 Enter a description for the event (which appears at the top of the Date Book screen).



5 Tap a blank area on the screen to de-select the untimed event.

 If you create an event and decide later that there is no particular start or end time, you can easily change it to an untimed event. Tap the time of the event in the Date Book screen, tap No Time, and then tap OK to confirm your selection and close the Set Time dialog.



Rescheduling an Event

Rescheduling an Event


You can easily make changes to your schedule with pdQ smartphone.

To reschedule an event:

- 1 Tap the event you want to reschedule.
- 2 Tap Details to open the Event Details dialog for that event.
- 3 Tap the Time box and select the new time as described earlier in this chapter to change the time.
- 4 Tap the Date box and select the new date as described earlier in this chapter to change the date.
- 5 Tap OK to close the Event Details dialog and return to the Date Book screen.

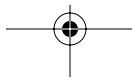
Setting an Alarm for an Event

The Alarm setting enables you to set an audible alarm to remind you of events in your Date Book. You can set an alarm to sound minutes, hours or days before an event. The default Alarm setting is 5 minutes before the time of the event, but you can change this to any number of minutes, hours or days.

When you set an alarm,  appears to the far right of the event with the alarm. When the alarm tone sounds, a reminder message also appears on pdQ smartphone's screen.

To set an alarm for an event:


- 1 Tap the event to which you want to assign an alarm.
- 2 Tap Details to open the Event Details dialog for that event.
- 3 To activate the alarm, select the Alarm check box in the Event Details dialog.
- 4 Tap ▼ to select Minutes, Hours or Days.
- 5 Select the "5" and enter any number from 0 to 99 (inclusive) as the numeric alarm setting.






Enter numeric setting here
Tap here to select alarm unit

- 6 Tap OK to close the Event Details dialog and return to the Date Book screen.

 You can set a silent alarm for an untimed event. In this case, the alarm triggers at the specified period of minutes, hours or days before midnight of the day of the untimed event. No audible alarm sounds for an untimed event; instead, the reminder message appears on pdQ smartphone's screen.

For example, you could create a reminder for an untimed event that occurs on February 4th. If the alarm reminder is set for 5 minutes, the alarm reminder appears at 11:55 PM on the night of February 3rd. The reminder remains on the screen until you turn on pdQ smartphone and tap OK to dismiss it.

Scheduling Repeating Events

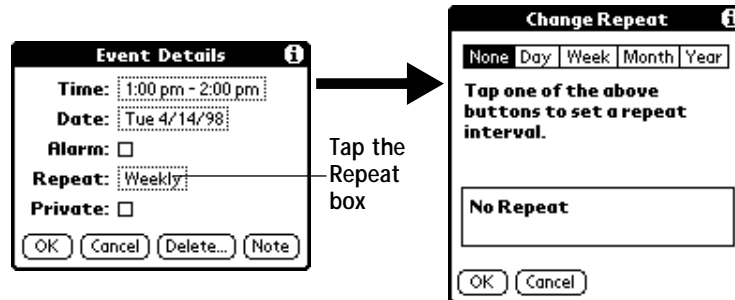
The Repeat function enables you to schedule events that recur at regular intervals. A birthday is a good example of an event that repeats annually. Another example would be a weekly guitar lesson that falls on the same day of the week and at the same time of day. After you enter a repeating event,  appears to the far right of the event.

To schedule a repeating event:

- 1 Tap anywhere on the text of an event in the Date Book screen.
- 2 Tap Details to open the Event Details dialog.

Scheduling Repeating Events

- 3 Tap Repeat to open the Change Repeat dialog.



- 4 Tap Day, Week, Month or Year in the Change Repeat dialog.
- 5 In the "Every" area, enter a number that corresponds to how often you want the event to repeat. For example, if you select Month and enter the number "2," the event repeats every other month.
- 6 If you want to specify an ending date for the repeating event, tap the End on pick list and tap Choose Date. Use the Date Picker to select an end date.
- 7 Tap OK to close the Change Repeat dialog and activate your settings.

Considerations for the Repeat Function

- If you change the start date of a repeating event, the pdQ smartphone calculates the number of days you have moved the event. pdQ smartphone then automatically changes the end date to maintain the duration of the repeating event.
- If you change the *repeat type* (such as, daily to weekly) of a repeating event, past occurrences (prior to the day on which you change the setting) are left alone and pdQ smartphone creates a new repeating event.
- If you change the date of an occurrence of a repeating event (such as, from January 14th to January 15th) and apply the change to all occurrences, the new date becomes the start date of the repeating event. pdQ smartphone adjusts the end date to maintain the duration of the event.
- If you change other repeat settings (such as, time, alarm, private) of a repeating event and apply the change to all occurrences, pdQ smartphone creates a new event. The start date of this new event is the day on which the setting is changed. Past occurrences (prior to the day of the change) are left alone and not changed.
- If you make a change to one occurrence of a repeating event (such as time), that occurrence no longer shows the Repeat icon.

Marking a Private Event

You can designate a specific event as “private.” When you activate the Security features, pdQ smartphone hides all private entries and you must enter a password to display them on the screen.

To mark an event as private:

- 1 Tap the event you want to mark as private.
- 2 Tap Details to open the Event Details dialog for that event.
- 3 Select the Private check box.
- 4 Tap OK to close the Event Details dialog and return to the Date Book screen.

Deleting an Event

There are three ways to delete an event from the Date Book application: simply delete the text of the event, use the Menu Commands (described in the “Record Menu” section later in this chapter), or use the Event Details dialog.



If you delete the text of a repeating event, you delete all instances of that event. If you use the Menu Command or the Event Details dialog, you can delete one occurrence of the event (as an exception) or all occurrences.

To delete an event with the Event Details dialog:

- 1 Tap anywhere in the text area of the event to delete.
- 2 Tap Details to open the Event Details dialog.
- 3 Tap Delete to open the Delete Event alert.
- 4 Tap OK to confirm you want to delete the event.

Changing the Date Book View

In addition to displaying the calendar for a specific day, you can also display your Date Book by the week or month, and you can display the current time.

To toggle through the different views:

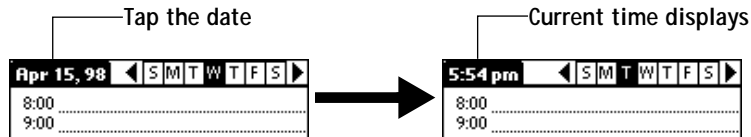
- ▶ Press the Date Book button repeatedly to display the next view.

Date Book

Changing the Date Book View

To display the current time:

- ▶ Tap the date in the Date Book title bar to display the current time.



After a few seconds, the title bar reverts to show the date.

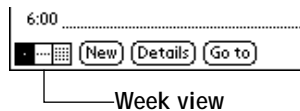
Working in Week View

The Week View shows a chart of your events for an entire week. This view lets you quickly review your appointments and available time slots.

In addition, the graphical display helps you spot overlaps and conflicts in your schedule.

To display the Week View:

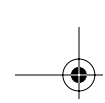
- 1 Tap Week View in the Date Book screen to display the Week View.



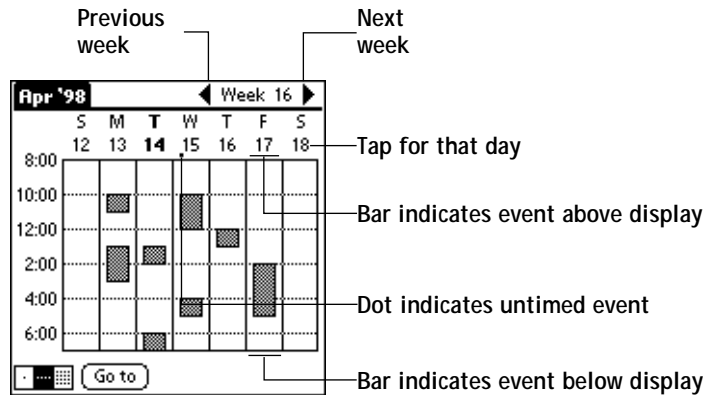
- 2 Tap the navigation controls to move forward or backward a week at a time, or to display details of an event.



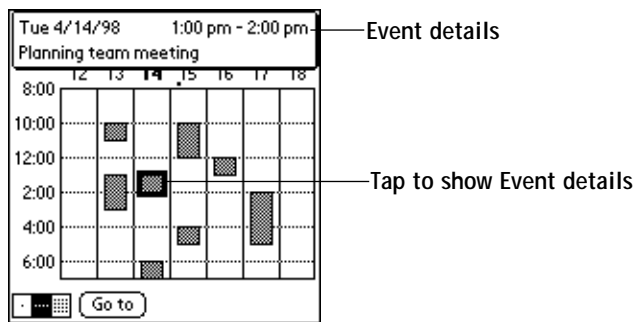
The Week View also shows untimed events and events that are before and after the range of times shown.



Changing the Date Book View




3 Tap any of your events to show a description of the event.



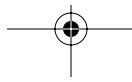
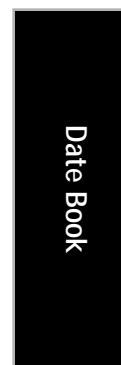
If you want to reschedule an event, tap and drag the event to a different time or day.

You can tap a blank time on any day to move to that day and have the time selected for a new event. Or you can tap any of the days and dates that appear at the top of the Week View to move directly to that day without selecting an event.

The Week View shows the time span defined by the Start Time and End Time in the Date Book Preferences settings. If you have an event before or after this time span, a bar appears at the top or bottom of that day's column, and these  on-screen scroll arrows appear if your scheduled events go beyond the displayed time range.

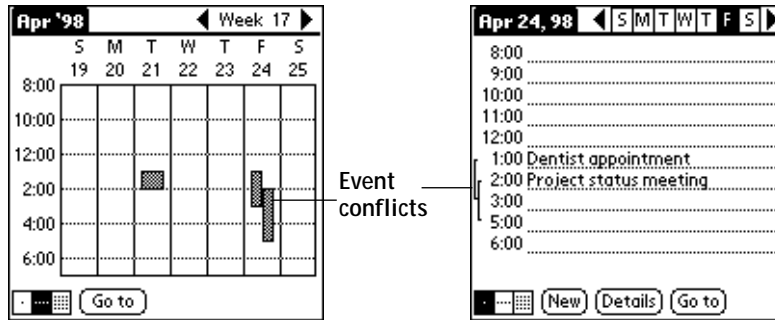
Spotting Event Conflicts in Week View

With the ability to define specific start and end times for any event, it's possible to schedule events that overlap (an event that starts before a previous event finishes).



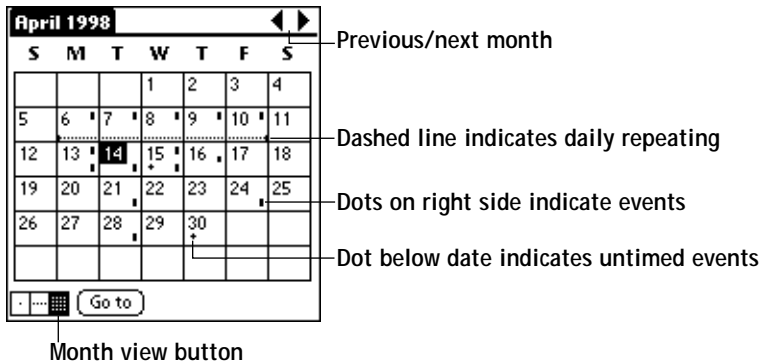
Changing the Date Book View

In this case, any event conflict (time overlap) appears in the Week View as overlapping bars. The Day View displays bracketed bars to the left of the conflicting times.




Working in Month View

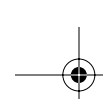
The Month View screen shows which days have events scheduled. Dots and lines in the Month View indicate events, repeating events and untimed events.



Tap any day that appears in the Month View screen to move directly to that day with the Day View screen. Tap the arrows at the top to move forward or backward a month. Tap Go To to open the Date Picker and choose a different month.

When the Month View is on the screen, tap the scroll button to move between months. Press the upper half of the button to display the previous month, or press the lower half to display the next month.

 You can control the dots and lines that appear in the Month View. See "Options Menu" later in this chapter.



Date Book Menu Commands

The Date Book includes menu commands to perform common file and editing tasks. This section explains the menu commands that are specific to the Date Book.

See "Using Menus" in the *pdQ Basics Handbook* for information about menu commands common to all of pdQ smartphone applications.

Record Menu

When you select the Record menu, its commands appear on screen.

Record	Edit	Options
New Event		✓N
Delete Event...		✓D
Attach Note		✓A
Delete Note...		✓O
Purge...		✓E
Beam Event		✓B

New Event

Creates an event and opens the Set Time dialog where you can choose start and end times for the new event. If you do not enter start and end times, it creates a blank untimed event.

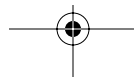
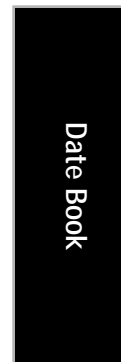
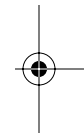
Delete Event

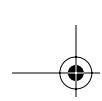
Opens an alert dialog, prompting you to confirm that you want to delete the current event. You must tap an event before you use the Delete Event command. Tap OK to delete the event from pdQ smartphone, or tap Cancel to close the alert dialog and keep the event.

By default pdQ smartphone removes the event from the Date Book, but retains a copy of the event and transfers it to an archive file on your computer the next time you perform a HotSync® operation. To remove the event completely, clear the Save archive copy on PC check box.

Attach Note

Opens the Note dialog, where you can create a Note for the current event.





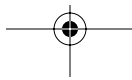
Date Book Menu Commands

Delete Note Opens an alert dialog, prompting you to confirm that you really want to delete the Note attached to the event. Tap OK to delete the Note from the memory of pdQ smartphone, or tap Cancel button to close the alert dialog and return to the Date Book.

Purge Opens an alert dialog, prompting you to confirm that you want to purge events older than a certain time period — based on pdQ smartphone's internal clock. You can use the Purge command to conserve memory on pdQ smartphone. The default setting for the Purge alert is to "Save archive copy on PC." This setting removes events from the Date Book, but retains copies and transfers them to an archive file on your computer during the next HotSync operation.

The Purge command also deletes repeating events if they *end* before the date that you activate the Purge command.

Beam Event Beams the current event to another pdQ smartphone through the IR port. See "Beaming Information to Other pdQ smartphones" in the *pdQ Basics Handbook* for more information.



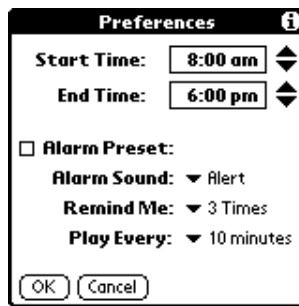
Options Menu

When you select the Options menu, its commands appear on screen.



Font Opens the Select Font dialog where you can choose a different font (text) style for your Date Book entries. See "Choosing Fonts" in the *pdQ Basics Handbook* for details.

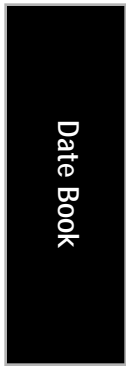
Preferences Enables you to set the range of times that appear in the Date Book, and to automatically activate alarms for each event.

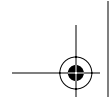


Start/End Time Enables you to define the start and end times for the Date Book screens. If the time slots you select do not fit on one screen, you can tap the arrows to scroll up and down.

Alarm Preset Automatically sets an alarm for each new event. The alarm for untimed events is defined by minutes, days or hours before midnight of the date associated with the event.

Alarm Sound Controls the type of tone the alarm generates when it sounds.





Date Book Menu Commands

Remind Me Defines how many times the alarm sounds. The choices are: Once, Twice, 3 times, 5 times and 10 times.

Play Every Defines how often the alarm sounds. The choices are every: Minute, 5 minutes, 10 minutes and 30 minutes.

Display Options Allows you to change the Date Book's appearance and which events display.



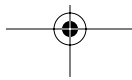
Show Time Bars Activates the time bars that appear in the Day View. The time bars show the duration of an event and illustrate event conflicts.

Compress Day View Controls how times appear in the Day View. When Compress Day View is off, all time slots display. When it is on, start and end times display for each event, but blank time slots toward the bottom of the screen disappear to minimize scrolling.

Month View Settings These check boxes apply to the Month View of the Date Book. You can activate any or all of these settings to show that you have Timed, Untimed or Daily Repeating events in the Month View *only*.

Phone Lookup Activates the Phone Lookup feature. See "Using Phone Lookup" in the *pdQ Basics Handbook*.

About Date Book Shows version (revision) information for the Date Book application.



Chapter 5

Dialer

Dialer



The Dialer gives you access to an on-screen keypad while the keypad on the front of pdQ™ smartphone is open. The Dialer's keypad works the same as the keypad on the front of the pdQ smartphone.

With the Dialer, you can:

- Make phone calls as if you were using the keypad on the front of pdQ smartphone.
- Make phone calls using the Address Book.
- Make phone calls using the Speed Dialer.



To open the Dialer:

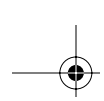
- ▶ Open the keypad, then tap  to display the on-screen keypad.



To make a call using the Dialer:



Use the Dialer to make phone calls with the keypad open.

- 1 Open the keypad, then tap  on the pdQ smartphone screen to turn on the phone.
- 2 Tap  to display the on-screen keypad.
- 3 Tap keys to enter a phone number, then tap Send.
- 4 Tap End when finished.





To make a call from the Dialer using the Address Book:

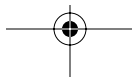
You use the Volume Control buttons, located on the left, side panel of the pdQ smartphone, to scroll through the Address Book. Address Book list entries display above the keys on the Dialer keyboard.

- 1 Open the keypad, then tap  on the pdQ smartphone screen to turn on the phone.
- 2 Tap  to display the on-screen keypad.
- 3 Press the Volume Control buttons to scroll through the Speed Dialer list.
- 4 When the phone number you want to call appears above the Dialer keypad, tap Send.
- 5 Tap End when finished.

To make a call from the Speed Dialer:

If you can't remember the number in the Speed Dialer list that corresponds to a phone number, tap a number on the keypad. When the pdQ smartphone detects a pause, it displays entries from the Speed Dialer list at the top of its screen. Press the Volume Control buttons on the left, side panel of the pdQ smartphone to scroll through the Speed Dialer list.

- 1 Open the keypad, then tap  on the pdQ smartphone screen to turn on the phone.
- 2 Tap  to display the on-screen keypad.
- 3 Tap the number from the Speed Dialer list that corresponds to the phone number you want to call, then tap Send.
- 4 Tap End when finished.



Chapter 6

Expense



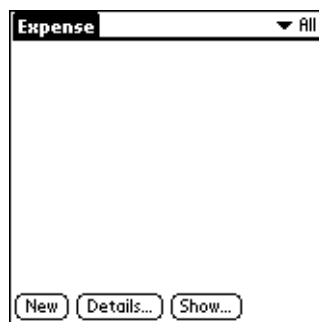
The Expense application enables you to keep track of your expenses and then transfer the information to a spreadsheet on your computer.

With the Expense application you can:

- Record dates, types of expenses, amount spent, payment method and other details associated with any money that you spend.
- Create categories for your expenses, such as business and personal expenses associated with a range of dates.
- Keep track of vendors (companies) and people involved with each particular expense.
- Log miles traveled for a particular date or expense category.
- Sort your expenses by date or expense type.
- Transfer your expense information to a Microsoft® Excel spreadsheet (version 5.0 or later) on your computer. (Microsoft Excel is *not* included with the pdQ™ smartphone package.)

To open Expense:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Expense List screen.

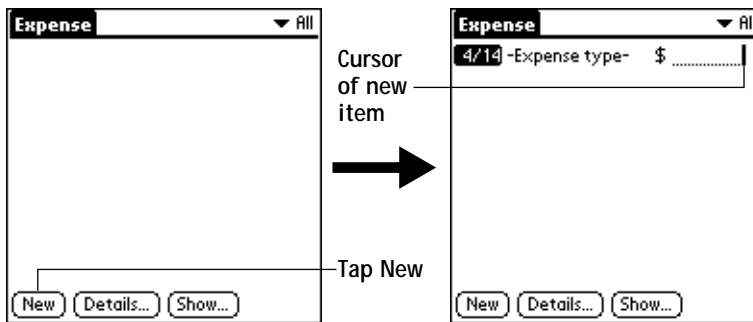



Creating an Expense Item

Creating an Expense Item

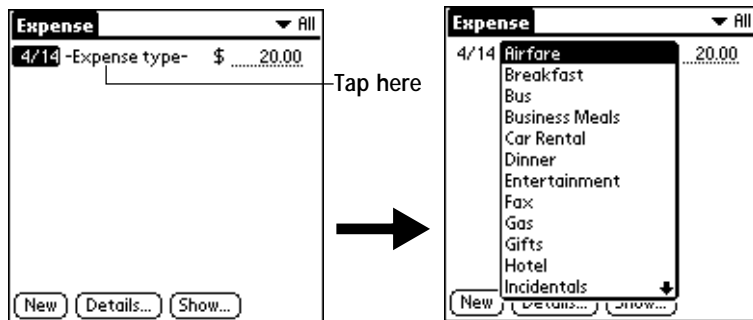
Expense enables you to record the date, expense type and the amount that you spent. You can sort your expense items into categories or add other information that you want to associate with the item. To create an expense item:


- 1 Tap New in the Expense List to create a new item.




 You can also create a new expense item by writing on the number side of the Graffiti® pad while in the Expense List screen. The first number you write begins your new expense item.

- 2 Enter the amount of the expense.
- 3 Tap the Expense Type pick list and select a type from the list.



 As soon as you select an expense type, pdQ smartphone saves your entry. If you do not select an expense type, it does not save the entry.

 A quick way to create a new expense item is to make sure that no expense item is selected in the Expense List, write the first

Entering Receipt Details

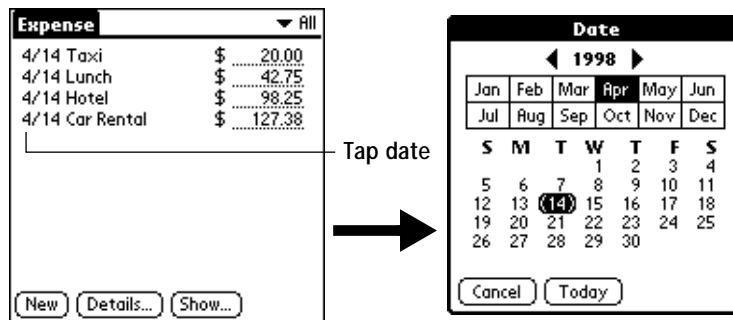
letter(s) of the expense type, and then write the numerical amount of the expense item. This technique takes advantage of the automatic fill feature. See "Options Menu" later in this chapter for details.

Changing the Expense Item Date

Initially, expense items appear with the date you enter them on pdQ smartphone. You can use the Expense application to change the date associated with any expense item.

To change the date of an expense item:

- 1 Tap the expense item you want to change to highlight the date.
- 2 Tap the date of the selected item to open the Date dialog.



- 3 Tap the date you want for the expense item.

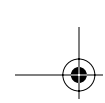
For more information about the Date dialog, see "Scheduling an Event."

Entering Receipt Details

The Expense application provides a variety of options that you can associate with an item. These options appear in the Receipt Details dialog.

To open the Receipt Details dialog:

- 1 Tap the expense item you want to assign details.
- 2 Tap Details to open the Receipt Details dialog.



Entering Receipt Details



3 Select any of the following options:

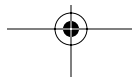
Category Defines the category for the Expense item. The default category is Unfiled when All is selected. Otherwise, the default is the currently selected category. An expense item remains in the default category until you change it.

pdQ smartphone provides two sample categories, New York and Paris, to show how you might sort your expenses according to different business trips.

Choose Edit Categories from the pick list to change existing or to create new expense categories. For example, you might create a category for a range of dates, such as a week or month, or you might delete or rename the New York and Paris categories.

Type Opens a pick list of the expense type options so that you can change the expense type for any of your expense items.

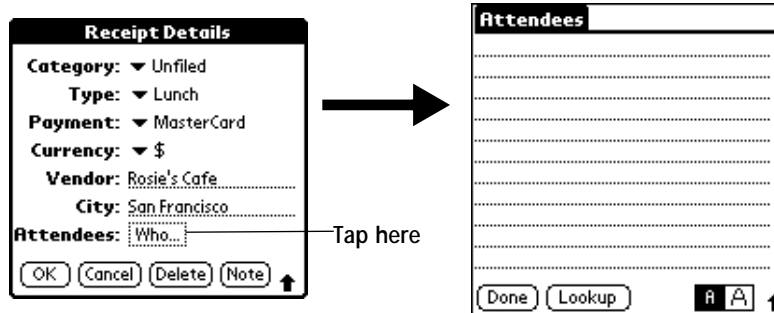
Payment Enables you to choose the payment method used to pay the expense item. If the item is prepaid (such as airline tickets supplied by your company), you can choose Prepaid to place your expense in the appropriate company-paid cell of your printed expense report spreadsheet. See "Transferring Your Data to Microsoft Excel" later in this chapter for more information.




Entering Receipt Details

- Currency** Enables you to choose the type of currency used to pay the expense item. The default currency unit is defined in the Preferences dialog (see "Preferences Menu" later in this chapter). You can also display up to four other common types of currency. See "Customizing the Currency Pick List" later in this chapter for details.
- Vendor and City** Enable you to record the name of the vendor (usually a company) associated with the expense and the city where the expense was incurred. For example, a business lunch might be at Rosie's Cafe (Vendor) in San Francisco (City).
- Attendees** Displays the Attendees screen, which resembles a memo in the Memo Pad. You can use this screen to list the people who attended the activity associated with the expense or to make notes, such as the purpose of the expense.

Expense



 Tap Lookup to display the names (and the corresponding companies) of the people in your Address Book.

- 4 Tap OK to close the Receipt Details dialog and activate your selections.

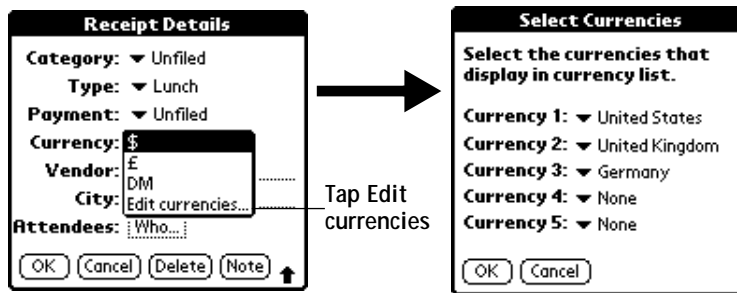
Show Options

Customizing the Currency Pick List


You can select the currencies and symbols that appear in the Currency pick list.

To customize the Currency pick list:

- 1 Tap the Currency pick list in the Receipt Details dialog, then tap the Edit Currencies selection to open the Select Currencies dialog.



- 2 Tap each Currency pick list to choose the country whose currency you want to display on that line.
- 3 Tap OK to close the Select Currencies dialog and activate your selections.

 If the currency you want to use is not in the list of countries, you can create your own custom country and currency symbol. See "Expense Menu Commands" later in this chapter for details.

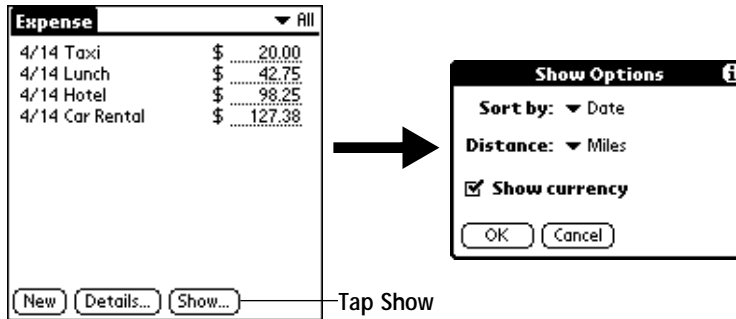
Show Options

The Show Options define the sort order and other settings that relate to your expense items.

To open the Show Options dialog:

- 1 Tap Show in the Expense List to open the Show Options dialog.

Transferring Your Data to Microsoft Excel




2 Select any of the following options:

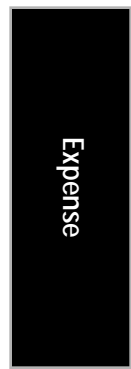
- Sort By** Enables you to sort the Expense entries by date or expense type.
- Distance** Enables you to display Mileage entries in miles or kilometers.
- Show Currency** Shows or hides the currency symbol in the expense list.

3 Tap OK to close the Show Options dialog and activate your selections.

Transferring Your Data to Microsoft Excel

After you enter your expenses into the Expense application on pdQ smartphone, the Palm™ Desktop software enables you to view and print the data with your computer.

 You need Microsoft Excel version 5.0 (or later) to view and print your Expense data using one of the provided templates. Microsoft Excel is *not* included with pdQ smartphone. The procedures in this section also assume that you have installed the Palm Desktop software. See "Installing Palm Desktop Software" in the *pdQ Basics Handbook* for more information.



Transferring Your Data to Microsoft Excel

Printing an Expense Report

Palm Desktop makes it quick and easy to print your Expense data.

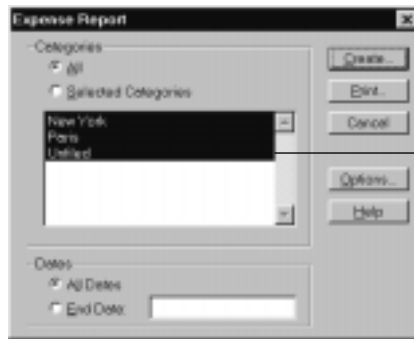
To print your expense report:

- 1 Perform a HotSync® operation to transfer your latest Expense data to your computer and make it available to Palm Desktop. See the "HotSync" chapter for details.
- 2 Click Expense in Palm Desktop to open Microsoft Excel and the Expense Report configuration dialog.



If you launch Expense from the Start menu (instead of Palm Desktop), you must first choose pdQ smartphone user name.

- 3 Click the expense category that you want to print.



Click to select Categories



You can press Shift+click to select multiple categories. To print the expenses associated with all of your Expense categories, click All in the Categories area.

- 4 If you want to define an end date for the expense report, enter the date in the End Date area.



If you do not specify an end date, all expense entries for the selected categories will appear — up to the date of the last HotSync operation with pdQ smartphone.

- 5 Click Print to display the expense report in the Print Preview window.

Transferring Your Data to Microsoft Excel




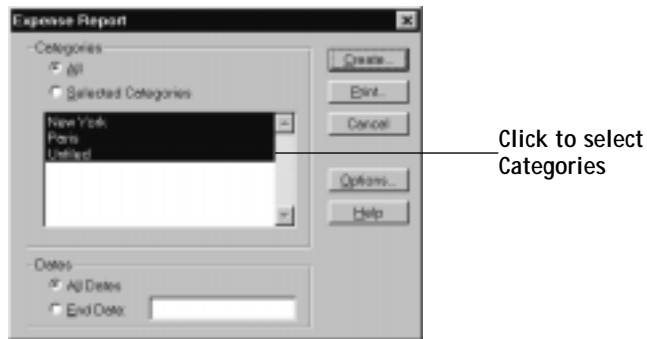
Expense

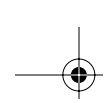
6 Click Print in the Microsoft Excel window to print your expense report.

To view your Expense data in a Microsoft Excel spreadsheet:

- 1 Perform a HotSync operation to transfer your latest Expense data to your computer and make it available to Palm Desktop.
- 2 Click Expense in Palm Desktop to open Microsoft Excel and the Expense Report configuration dialog.

 If you start Expense from the Start menu (instead of Palm Desktop), you must first choose user name.





Transferring Your Data to Microsoft Excel

3 Click the expense category that you want to use.



You can press Shift+click to select multiple categories. If you want to view the expenses associated with *all* of your Expense categories, click All in the Categories area.

4 If you want to define an end date for the expense report, enter the date in the End Date area.



If you do not specify an end date, *all* expense entries for the selected categories will appear — up to the date of the last HotSync operation.

5 Click Create to display a Microsoft Excel spreadsheet containing your Expense data.

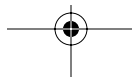
Travel Expense Reimbursement						
Employee Name:				Client:		
Date Submitted:	1/31/98			Project:		
	Mis/Km Rate	0.29				
Date	Country	Currency Amount	Exchange Rate	US Dollar Amount	Expense Type	Note: D
4/9/98	United States	39.15	1.00	\$39.15	Mileage	



At this point, your Expense data appears in Microsoft Excel spreadsheet form. You can enter information, make formatting changes and save and print the file in the normal manner.

Using Expense Report Templates

Palm Desktop software comes with several expense report templates. When you use one of these templates, you can edit your Expense data in Microsoft Excel. If you want to streamline or customize your expense reports, you can change these templates. For example, you can add your company name to a template. See "Appendix A: Expense Templates" for sample templates and "Appendix B: Creating a Custom Expense Report" for details on changing templates.



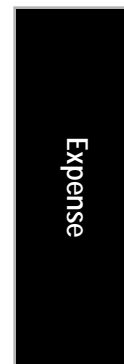
To view your Expense data using a Microsoft Excel template:

- 1 Display your Expense data in a Microsoft Excel spreadsheet as described in the previous procedure.
- 2 Click Options to open the Expense Report Options dialog.



Enter name and other information

Choose expense template



- 3 Enter name, department and other information as necessary for your expense report.
- 4 Click the Templates menu, then click an expense template. See "Appendix A: Expense Templates" for samples.



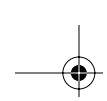
If you want to create your own custom expense template and have it appear in the Templates menu, refer to "Appendix B: Creating a Custom Expense Report."

- 5 Click OK to return to the Expense Report Options dialog.

Expense Menu Commands

The Expense application includes menu commands to perform common file and editing tasks. This section explains the menu commands that are specific to the Expense application.

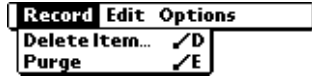
See "Using Menus" in the *pdQ Basics Handbook* for information about menu commands that are common to all of pdQ smartphone applications.



Expense Menu Commands

Record Menu

When you select the Record menu, its commands appear on screen.



Delete Item

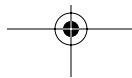
Opens an alert dialog, prompting you to confirm that you want to delete the current expense item. You must tap an item before you can use the Delete Item command. Tap OK to delete the item from pdQ smartphone, or tap Cancel to close the alert dialog and keep the item.

By default pdQ smartphone removes the item from the Expense application, but retains a copy of the item and transfers it to an archive file on your computer the next time you perform a HotSync operation. To remove the item completely, clear the Save archive copy on PC check box.

Purge

Conserves memory on pdQ smartphone by deleting expense categories that you no longer use.

The Purge command prompts you to confirm that you want to purge all the records from the selected category.



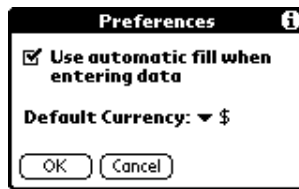
Options Menu

When you select the Options menu, its commands appear on screen.



Preferences

Activates the Preferences dialog, which is used to activate the automatic fill feature and to set the default currency symbol.



Use automatic fill Enables you to select an expense type by writing the first letter of an expense type in the Graffiti writing area. For example, if you write the letter "T," it enters the "Taxi" expense type. Writing "T" and then "E" enters "Telephone" which is the first expense type beginning with the letters "TE."

Default currency Sets the default currency symbol for the Expense application.

Custom Currencies

Enables you to define additional currency symbols for the Expense application.

You need to use this command only if the currency symbol you need is not available in the Currency pick list of the Receipt Details dialog (See "Entering Receipt Details" earlier in this chapter).

About Expense

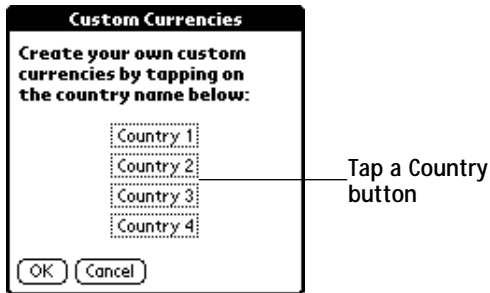
Shows version (revision) information for the Expense application.



Expense Menu Commands

To define a custom currency symbol:


- 1 Choose Custom Currencies from the Options menu to open the Custom Currencies dialog.

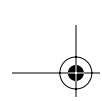


- 2 Tap one of the four Country boxes to open the Currency Properties dialog.




- 3 Enter the name of the country and the symbol that you want to appear in the Expense application, and then tap OK to define your setting.
- 4 Tap OK to close the Custom Currencies dialog.

 To use your custom currency symbol as the default for all Expense entries, choose the symbol in the Preferences dialog. To use your custom currency symbol only for particular expense items, choose the symbol in the Receipt Details dialog associated with those items.



Chapter 7

HotSync®

 HotSync® technology enables you to synchronize data between one or more pdQ™ smartphones and the Palm™ Desktop software. To synchronize data, you must connect your the pdQ smartphone cradle directly to your computer.

With HotSync technology, you can:

- Synchronize the Date Book, Address Book, To Do List, Memo Pad and Expense entries on pdQ smartphone with the entries on your computer, and vice versa.
- Manage individual or multiple pdQ smartphones with a centralized computer.
- Keep your data safe by automatically creating backup copies each time you synchronize.

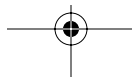
The HotSync Technology Process and the HotSync Manager

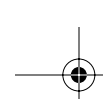
The HotSync technology process automatically synchronizes data between pdQ smartphone and your computer. Changes you make on pdQ smartphone or computer appear in both places after a HotSync technology operation. HotSync technology synchronizes only the needed portions of files, thus reducing synchronization time. You can synchronize your data by connecting pdQ smartphone directly to your computer with the HotSync cradle or indirectly to a network.

The HotSync Manager oversees the synchronization process. It runs in the background and monitors a communications port on your computer for a HotSync command from a pdQ smartphone. When it “hears” a HotSync command, HotSync Manager synchronizes data in the Date Book, Address Book, To Do List, Memo Pad, Mail and Expense applications. It can synchronize the data even when Palm Desktop is not running!

Once you complete a few simple setup steps, performing a HotSync technology operation is as simple as pressing a button. Follow the steps in the next section to complete the setup.

HotSync®






Performing a HotSync Technology Operation for the First Time

Performing a HotSync Technology Operation for the First Time

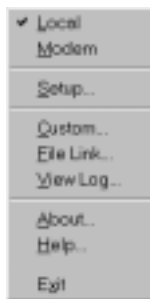
The first time you synchronize your data, you need to enter user information on both pdQ smartphone and the computer. Once you enter this information and synchronize, the HotSync Manager recognizes pdQ smartphone and doesn't ask for this information again. If you are a System Administrator preparing several pdQ smartphones for a group of users, see "Creating a User Profile" later in this chapter before performing the following steps.

To perform a HotSync technology operation for the first time:

- 1 Double-click the Palm Desktop icon on the Windows desktop (or select Palm Desktop from the Start menu) to start the Palm Desktop software.
- 2 Click  in the Windows System Tray to open the HotSync Manager menu.




The Windows System Tray is usually in the lower-right corner on your computer display. The location may vary depending on the location of the taskbar and the version of Windows you are using.



- 3 Click Local from the HotSync Manager menu to indicate that you are using the cradle to synchronize.
- 4 Turn on pdQ smartphone and slide it into the cradle.

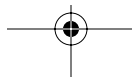


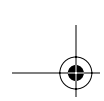
The curved edge on the bottom of pdQ smartphone should align smoothly with the cradle when it is inserted properly.

- 5 Tap  on pdQ smartphone's screen to open the New User dialog.
- 6 Enter a user name for pdQ smartphone. Then, click OK to open the HotSync Progress dialog and start the synchronization process.

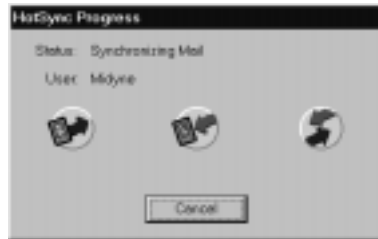


Every pdQ smartphone should have a unique name. Never try to synchronize more than one pdQ smartphone using the same user name.





Conducting a Local HotSync technology operation




- 7 Wait for a message indicating that the process is complete.

Conducting a Local HotSync technology operation

After you complete the first HotSync technology operation, the HotSync technology process is even faster and easier!

To conduct a local HotSync technology operation:


- 1 Insert pdQ smartphone into its cradle.
- 2 If the HotSync Manager is not running, start it.
- 3 Tap  on the pdQ smartphone screen to start the HotSync technology process.
- 4 Wait for a message indicating that the process is complete.

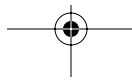
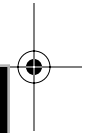
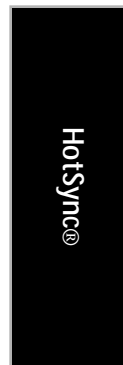


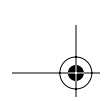
Selecting HotSync Setup Options

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

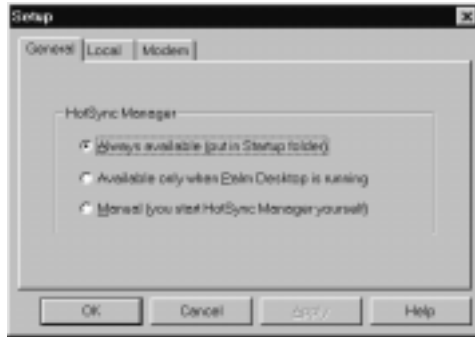
To set the HotSync Options:

- 1 Click  in the Windows System Tray to open the HotSync Manager menu.
- 2 Click Setup on the HotSync Manager menu to open the Setup dialog.





Selecting HotSync Setup Options



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

Always available Adds HotSync Manager to the Startup folder and constantly monitors the communication port for pdQ smartphone synchronization requests. With this option, the HotSync Manager conducts synchronizations even when Palm Desktop is not running.

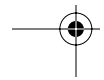
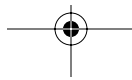
Available only when Palm Desktop is running Starts HotSync Manager and monitors requests automatically when you open the Palm Desktop software.

Manual Starts the HotSync Manager and monitors requests only when you select HotSync Manager from the Start menu.

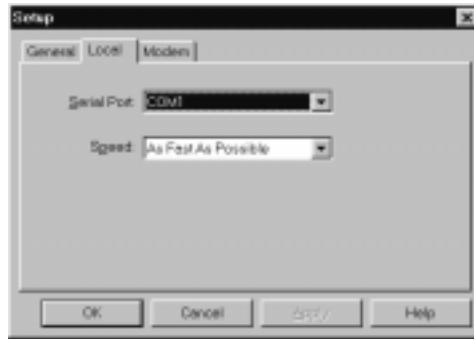


If you're not sure which option to use, keep the Always available default setting.

4 Click the Local tab to display the settings for the connection between your PC and pdQ smartphone's cradle, then adjust the following options as needed.



Selecting HotSync Setup Options



Serial Port

Identifies the port Palm Desktop will use to communicate with the cradle. This selection should match the port number where you connected the cradle.

pdQ smartphone cannot share this port with an internal modem or other device. If you have trouble determining the correct serial port, see "Troubleshooting" in the *pdQ Basics Handbook*.

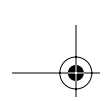
Speed

Determines the speed at which data is transferred between pdQ smartphone and Palm Desktop. We suggest you try the As Fast As Possible rate first, and adjust downward if you experience problems. This setting allows pdQ smartphone and the Palm Desktop to find and use the fastest speed.

- 5 Click the Modem tab to display the Modem settings and adjust the following options as needed.



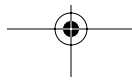
HotSync®



Selecting HotSync Setup Options

- Serial Port** Identifies the port where the modem is located. If you are unsure of the port assignment, look at the Modem Properties in the Windows Control Panel.
- Speed** Determines the speed at which data is transferred. We suggest you try the As Fast As Possible rate first, and adjust downward if you experience problems. This setting allows pdQ smartphone and the Palm Desktop to find and use the fastest speed.
- Modem** Identifies the modem type or manufacturer. Refer to your modem manual or face plate for its type or settings. If you're not sure of your modem type or your modem doesn't match any that appear in the list, choose Hayes Basic.
- Setup String** Identifies the setup string for your particular modem. Not all modems require a setup string. Refer to your modem manual and enter the setup string if recommended by the manufacturer.

- 6 Click OK to close the Setup dialog.




Customizing HotSync Application Settings

For each application you can define a set of options that determines how records are handled during synchronization. These options are called a “conduit.” By default, Palm Desktop synchronizes all files between pdQ smartphone and the Palm Desktop. In general, you should leave the settings to synchronize all files. The only reason you might want to change these settings is to overwrite data on either pdQ smartphone or Palm Desktop, or to avoid synchronizing a particular type of file because you don't use it.

In addition to the Date Book, Address Book, To Do List, Memo Pad and Expense application conduits, Palm Desktop includes System and Install conduits. The System conduit backs up the system information stored in pdQ smartphone, including Graffiti® software ShortCuts. The Install conduit is used to install pdQ smartphone-compatible applications.

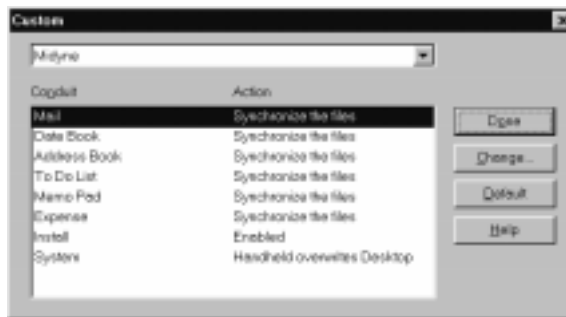
To customize HotSync application settings:

- 1 Click  in the Windows System Tray to open the HotSync Manager menu.

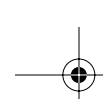


You can also click the HotSync command on the Palm Desktop menu bar to open the HotSync Manager menu.

- 2 Click Custom from the HotSync menu to open the Custom dialog.



- 3 Select the appropriate user name from the list at the top of the dialog.
- 4 Click an application in the Conduit list to choose the conduit you want to change.
- 5 Click Change to open the Change HotSync Action dialog.



Conducting HotSync technology operation via a Network



- 6 Click the direction in which you want to write data, or click Do Nothing to skip data transfer for an application.



Changing the HotSync setting from the default affects only the *next* HotSync technology operation. Thereafter, the HotSync Actions revert to their default settings. To use a new setting on an ongoing basis, select the Set As Default box. Thereafter, just click Default in the Custom dialog to revert to the default settings.

- 7 Repeat steps 2 through 5 to change conduit settings for other applications or for a different user name.
- 8 Click OK to close the Change HotSync Action dialog and activate your settings.

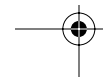
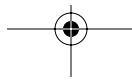


Conducting HotSync technology operation via a Network

When you use the Network HotSync software, you can take advantage of the LAN and WAN connectivity available in many office environments. The Network HotSync software enables you to perform a HotSync technology operation using a cradle that is connected to any PC on your LAN or WAN (provided that the PC connected to the cradle also has the Network HotSync software installed and your PC is on and the HotSync Manager is running).

Creating a User Profile

If you need to configure a number of pdQ smartphones with specific information (such as a company phone list) before distributing them to their actual users, you can create a User Profile to load the data into a pdQ smartphone without associating that data with a user name. The User Profile feature is designed only for the first-time HotSync technology operation, before you assign a User ID to a particular pdQ smartphone. See "Using File Link" later in this chapter for information about loading data after you assign a User ID.



To create a User Profile:

- 1 Open the Palm Desktop software.
- 2 Click Users from the Tools menu to open the Users dialog.
- 3 Click Profiles to open the Profiles dialog.




- 4 Click New to open the New Profile dialog.



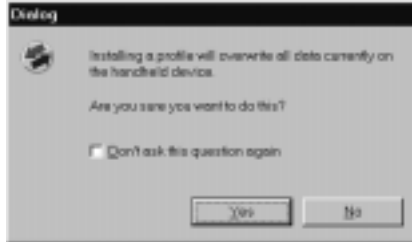
- 5 Enter a name for the Profile and click OK to return to the Profiles dialog.
- 6 Repeat steps 3 and 4 for each Profile that you want to create, then Click OK to close the Profiles dialog and return to Palm Desktop.
- 7 Select the Profile from the User list and create the data for the Profile (such as, company phone list).



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

- 1 Place the new pdQ smartphone in the cradle, then tap  to open the Users dialog.
- 2 Click Profiles to open the Profiles dialog.
- 3 Choose the profile that you want to install on pdQ smartphone, then click OK to open the following alert dialog:

Using File Link



- 4 Click Yes to transfer all the Profile data to the pdQ smartphone.

The next time you perform a HotSync technology operation, Palm Desktop will prompt you to assign a User name to the pdQ smartphone.

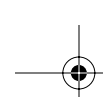
Using File Link

The File Link feature enables you to synchronize the Address Book and Memo Pad information on pdQ smartphone with a separate external file, such as a company phone list. HotSync Manager stores the data in a separate category on your Palm Desktop and pdQ smartphone. You can configure the File Link feature to check for changes to the external file when you perform a HotSync technology operation.

With File Link you can synchronize with data stored in any of the following formats:

- Comma-separated (*.csv)
- Memo Pad archive (*.mpa)
- Address Book archive (*.aba)
- Text (*.txt)

For information on how to set up a File Link, see the Palm Desktop Software online Help.



Chapter 8

Mail



The Mail application enables you to manage your e-mail. You can use Mail to synchronize the mail in your computer's e-mail application with the mail on pdQ™ smartphone.



pdQ smartphone is delivered with two e-mail applications: Mail and pdQmail. Mail lets you read, store, and delete e-mail messages received on your computer and to create e-mail messages. To transfer e-mail messages between pdQ smartphone and your computer, you need to perform HotSync. You cannot use Mail to send or receive e-mail messages from pdQ smartphone.

If you delete messages from pdQ smartphone using Mail, your next HotSync® operation also deletes the messages from your computer's e-mail application — so you never have to delete messages twice. Similarly, if you read a message on pdQ smartphone and leave it in your inbox, your next HotSync operation marks it as read on your computer's e-mail.

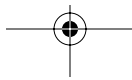
pdQmail is the most powerful and versatile e-mail application available for the Palm III operating system. You can use pdQmail to send, receive, create, and manage e-mail messages directly from pdQ smartphone. This capability makes it easier than ever to stay in touch with the added convenience that only a wireless hand-held smartphone provides.

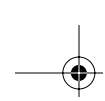
With Mail, you can:

- Use your pdQ smartphone to send and retrieve e-mail messages *from* your computer's e-mail application.
- View, delete, file and reply to incoming mail.
- Create outgoing messages as well as drafts of messages that you can complete later.
- Create simple or complex filters, which allow you to decide the type of e-mail that your pdQ smartphone retrieves from your computer's e-mail application.

To open Mail:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Message List screen.





Setting Up Mail on the Desktop



Setting Up Mail on the Desktop

Before you use Mail for the first time, your computer's e-mail application should be up and running. You must also set up the pdQ™ Desktop software for use with your computer's e-mail application.




The following instructions assume that you have already installed Palm Desktop software on your computer and that you did not set up Mail during the installation. If you have not yet installed the Palm Desktop software, the installation procedure will prompt you to set up Mail as part of the Palm Desktop software installation.



To set up Mail:

- 1 Click Start on the Windows computer's to open the Start menu.
- 2 Point to Programs, point to Palm Desktop, and then click Mail Setup to start the setup procedure.
- 3 Follow the instructions on the screen to set up pdQ smartphone for use with your computer's e-mail application.

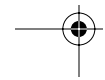
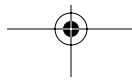
To select HotSync options:

- 1 Click  in the Windows System Tray to open the HotSync menu.
- 2 Click Custom from the HotSync menu to open the Custom dialog.

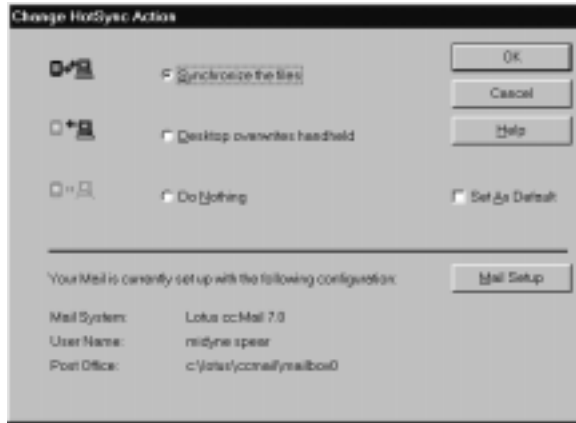


You can also click Custom from the HotSync menu in Palm Desktop.

- 3 Click Mail in the Custom list box.
- 4 Click Change to open the Change HotSync Action dialog.




Setting Up Mail on the Desktop




5 Click one of the following settings:

- Synchronize the files** Synchronizes the mail on pdQ smartphone and your computer's e-mail application.
- Desktop overwrites handheld** Replaces the mail on pdQ smartphone with the mail in your computer's e-mail application. You should use this option only if, for some reason, the two inboxes get out of sync. This setting applies for only one HotSync operation and then reverts back to the default setting.
- Do Nothing** Turns off communication between your pdQ smartphone and computer's e-mail application. This setting applies for only one HotSync operation and then reverts back to the default setting.
- Set As Default** Changes the default setting on an ongoing basis. (When you first set up Mail, Synchronize the files is the default setting.)


 To turn off mail, select Do Nothing and then select the Set as Default check box.

To change your Mail setup options:

- 1 Click  in the Windows System Tray to open the HotSync menu.
- 2 Click Custom from the HotSync menu to open the Custom dialog.



Synchronizing Mail with your E-Mail Application

 You can also click Custom from the HotSync menu in Palm Desktop.

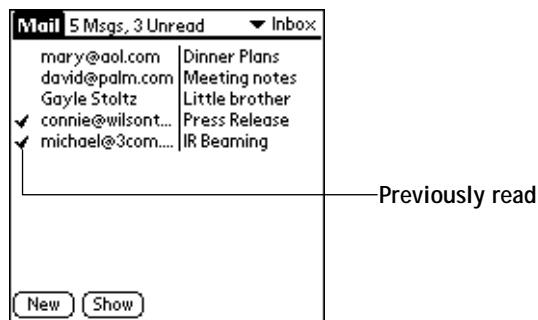
- 3 Click the Mail in the Conduit list to indicate that you want to change these settings.
- 4 Click Change to open the Change HotSync Action dialog for the Mail conduit.
- 5 Modify your settings as needed.
- 6 Click OK to confirm your changes and close the Change HotSync Action dialog.

Synchronizing Mail with your E-Mail Application

After you have enabled and configured Mail, you need to perform a HotSync operation to synchronize Mail with your computer's e-mail application. For a complete explanation of how to use the HotSync feature, see the "HotSync" chapter.

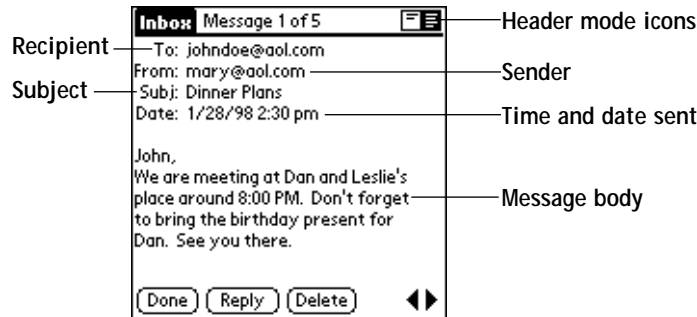
Viewing Messages

The Message List lists your incoming messages, who sent them and the date they were received. Messages you've read appear with a check next them and high-priority messages appear in bold.



To open a message:

- ▶ Tap a message in the list to open it.



Messages appear by default in the abbreviated mode. To switch from the abbreviated mode to the full header mode, see "Displaying Full Header Information" later in this chapter.

To close a message:

- ▶ Tap Done to close the message and return to the Message List.

Message Fonts

You can modify the way messages appear by changing the font (text) style. See "Choosing Fonts" in the *pdQ Basics Handbook* for details.

Displaying Full Header Information

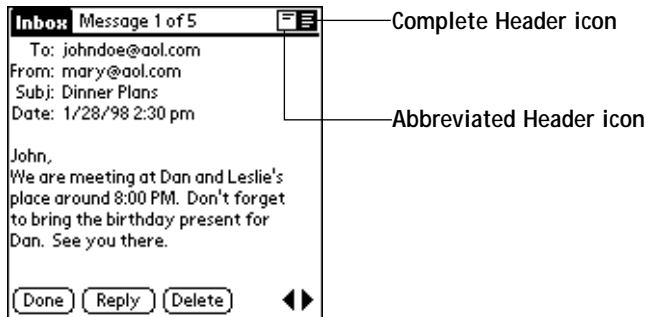
By default, Mail displays abbreviated header information. The abbreviated header displays only the From and Subject fields. The full header provides complete information about the sender, receiver and CC recipients, in addition to the subject and date the message was created. Mail uses the header type you select for all your messages.


To display full header information:

- 1 Open a message.
- 2 Tap Complete Header to display the full header.



Creating Messages



 To redisplay the abbreviated header, tap the Abbreviated Header icon.

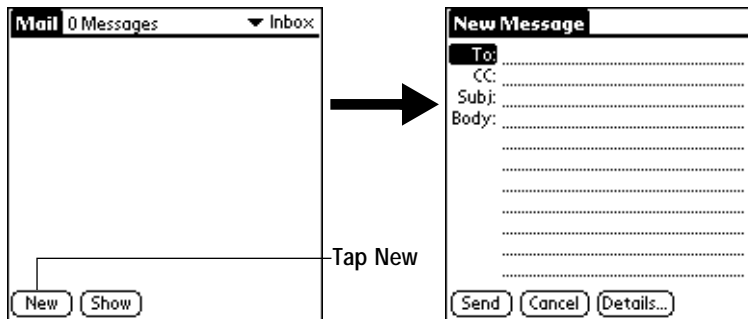
Creating Messages

You create messages with pdQ smartphone the same way you create messages with your computer's e-mail application: you identify the recipient(s) of the message, define a subject and create the body of the message.

You create original messages and replies in the New Message screen. All messages must, at the very least, contain information in the To and Subject fields.

To create a message:

- 1 Tap New in the Message List screen to display the New Message screen.

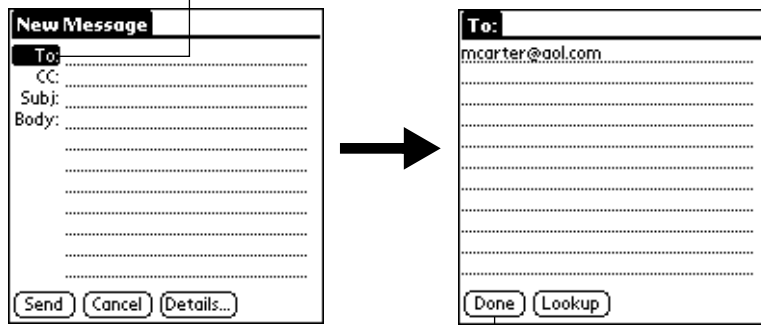


 You can also display the New Message screen by tapping New from the Message menu.

- 2 Use the stylus to write Graffiti® character strokes (or the on-screen

Looking Up an Address

Tap the name of the field to open



Tap to return to New Message screen

To reply to a message:

- 1 Tap a message in the Message List to display it on the screen.
- 2 Tap the Reply button to open the Reply Options dialog.



- 3 Select who you want to receive the reply: only the Sender, All recipients and the sender or do you want to Forward the message to someone else.
- 4 Select whether you want to Include original text and Comment original text.
- 5 Tap OK to close the Reply Options dialog and display the New Message screen.
- 6 Enter your reply text.



You have several message options including setting the priority. See "Adding Message Details" for details.

- 7 Tap Send to place your reply in the Outbox.

Looking Up an Address


To identify the recipient of a message, you need to enter that person's e-mail address in the appropriate field of the Message screen. You can do this

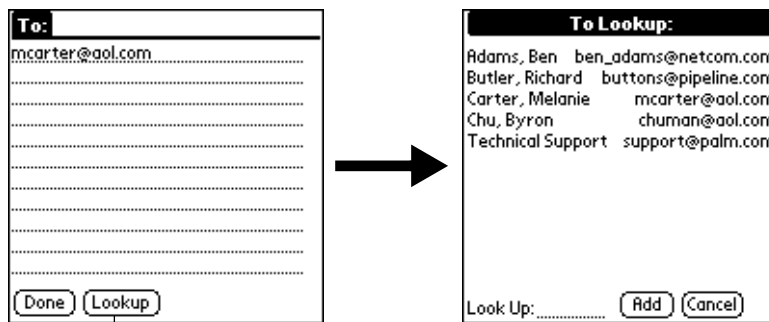
Looking Up an Address

either by entering the data directly into the field or by using the Look Up command to access the information in your Address Book.

To look up an address:

- 1 Tap either the To or CC field name to expand one of these fields.
- 2 Enter a few letters of the address you want to find.
- 3 Tap Lookup.
- 4 If the letters you enter identify a unique listing from your Address Book, pdQ smartphone completes the address for you. If not, the Lookup dialog appears.

 You can also open the Look Up dialog in the New Message screen by tapping Lookup from the Options menu or by using the Command stroke /L.

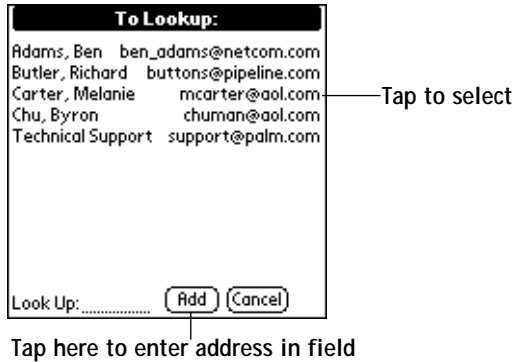


Tap here

- 5 Enter the first letter of the entry you want to find to scroll to the first entry that begins with that letter. If you write an additional letter, the list scrolls to the first entry that starts with those two letters. For example, writing an "s" might scroll to "Sanders," and writing "sm" might scroll farther to "Smith."
- 6 Tap an address to select it.
- 7 Tap Add to enter the address in the To or CC field.



Adding Message Details




Adding Message Details

Before you send your message, you can attach additional attributes (called message details) to your message, such as a signature block, or flagging the message as high-priority. These features are dependent on the computer's e-mail application you use. If your e-mail application does not support the selected message detail, pdQ smartphone cannot attach that attribute to your message.

The following message details are available:

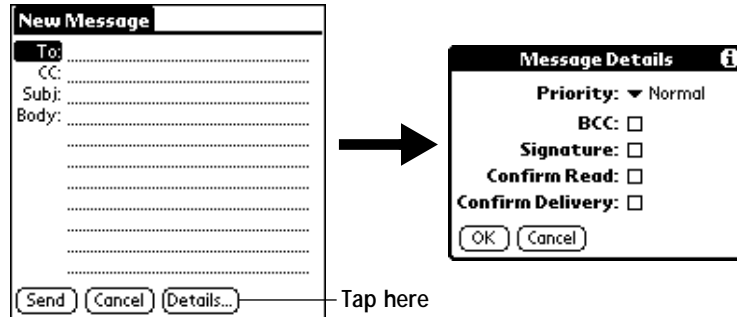
- Priority** Flags a message as high, normal or low priority.
- BCC** Creates a blind carbon copy field in the New Message screen.
- Signature** Attaches previously defined text as a signature block. See "Adding a Signature to Your Message" later in this chapter for details.
- Confirm Read** Requests a confirmation telling you when the message was read.
- Confirm Delivery** Requests a confirmation telling you when the message was delivered.

 The Priority and BCC settings are valid only for the current message and must be set with each subsequent message you create.

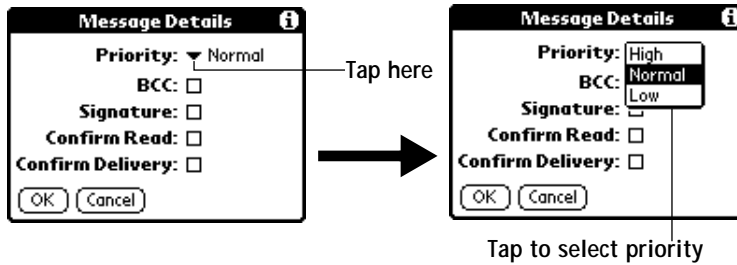
Setting a Priority

To set a priority for your message:


- 1 Tap Details in the New Message screen to open the Message Details dialog.



- 2 Tap the Priority pick list and select the priority you want.



- 3 Tap OK to confirm your selection and return to the New Message screen.

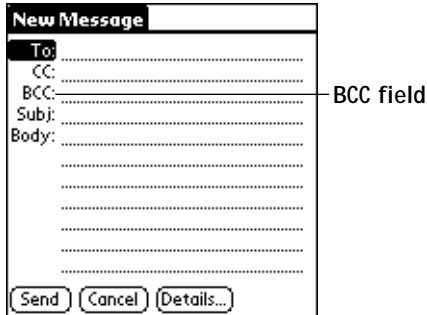
 pdQ smartphone can flag messages with a specific priority only if your computer's e-mail application supports this feature.

Sending a Blind Carbon Copy

To add a BCC field to your message:

- 1 Select the BCC check box in the Message Details dialog to add the BCC field to the New Message screen.
- 2 Tap OK to confirm your selection and return to the New Message screen.

Adding Message Details




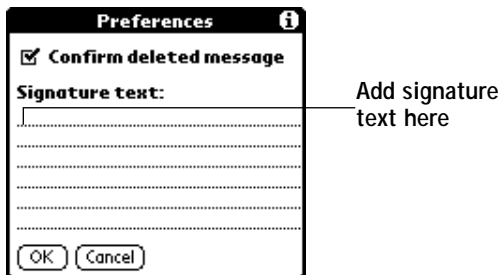
- 3 Tap the BCC field and enter the address.

Adding a Signature to Your Message

Adding a signature to your message is a two-part process: first, you must create your signature, then you must select the signature option from the Message Detail dialog.

To create a signature:

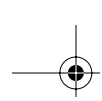
- 1 Tap the  icon to open the Mail menus.
- 2 Tap Preferences from the Options menu to open the Preferences dialog.



- 3 Tap in the Signature Text field and enter up to six lines of text.
- 4 Tap OK to confirm your selection and return to the previous screen.

To add a signature to your message:

- 1 Tap Details in the New Message screen to open the Message Details dialog.
- 2 Select the Signature check box to add a signature to the end of your message.
- 3 Tap OK to confirm your selection and return to the New Message screen.



The signature block does not display in your message; only your recipient sees the signature block.

Requesting Confirmations

To receive a confirmation when your message is read:

- 1 Tap Details in the New Message screen to open the Message Details dialog.
- 2 Select the Confirm Read check box to request a confirmation when the recipient reads your message.
- 3 Tap OK to confirm your selection and return to the New Message screen.

To receive a confirmation when your message is delivered:

- 1 Tap Details in the New Message screen to open the Message Details dialog.
- 2 Select the Confirm Delivery check box to request a confirmation that the recipient received your message.
- 3 Tap OK to confirm your selection and return to the New Message screen.

Sending Messages

When you send Mail messages from pdQ smartphone, it stores them in the Outbox folder until the next time you synchronize pdQ smartphone with your computer. During synchronization, all messages stored in the Outbox folder are transferred to the Outbox folder in your computer's e-mail application. Messages created on pdQ smartphone are transmitted the next time you send mail from your computer's e-mail application.

To send a message:

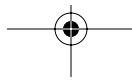
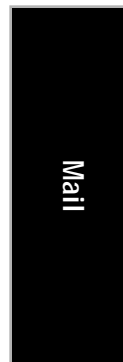
- ▶ After you create a message, tap the Send button in the New Message screen.

Editing an Unsent Message

You can edit or make changes to a message that has not yet been sent, as long as you have not yet performed a HotSync operation. When you edit a message, pdQ smartphone removes the message from the Outbox folder and takes you back to the New Message screen, where you can edit the message and resend it, save it as a draft or cancel it.

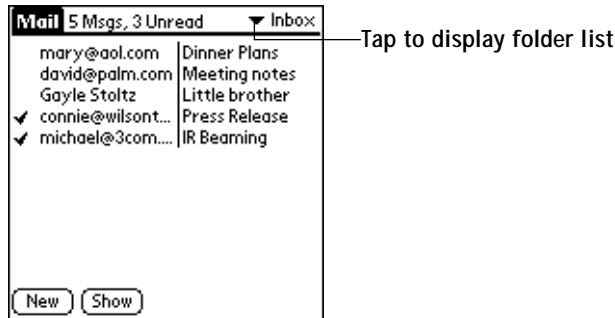
To retrieve a message:

- 1 In the Message List screen, tap Outbox from the pick list in the upper-

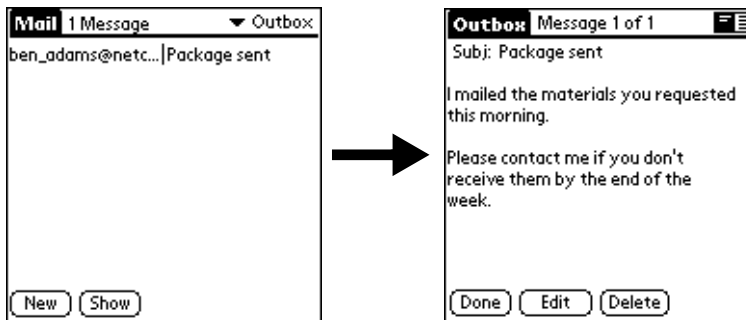


Draft Messages

right corner to display the messages contained in the Outbox.




2 Tap the message you want to retrieve to display the message.




3 Tap Edit to remove the message from the Outbox folder and place it back in the New Message screen.

Draft Messages

There are times when you may not want to immediately send a message you compose — for example, you may want to add additional information before sending it. pdQ smartphone stores such messages in the Draft folder until you are ready to edit them. When you edit a draft, it becomes a new message again.

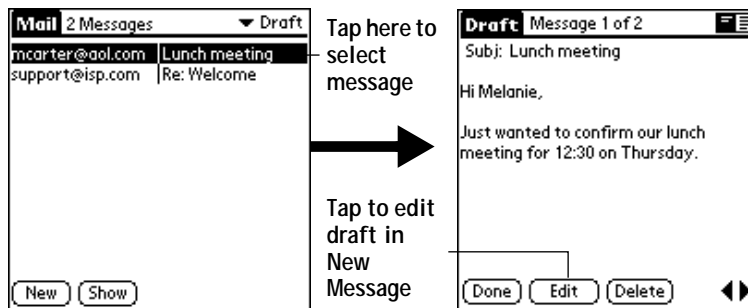
 When you're creating or editing a message, you can also save a message as a draft by canceling it. When you cancel a message, pdQ smartphone opens a dialog asking if you want to save the message. If you tap Yes, pdQ smartphone saves a draft of your message.

To save a message as a draft:

- 1 Create a message in the New Message screen.
- 2 Tap  to open the Mail menus.
- 3 Tap Save Draft from the Message menu to move the message to the Draft folder.

To edit a message saved as a draft:

- 1 In the Message List screen, tap Draft from the pick list in the upper-right corner to display a list of the messages in the Draft folder.
- 2 Tap the draft you want to display.




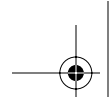
- 3 Tap Edit to move your draft to the New Message screen.
- 4 Enter your changes, then either save it again as a draft or tap the Send button to move the message to your Outbox folder.

Filing a Message

pdQ smartphone can store any message you receive or create in the Filed folder. The contents of this folder do not automatically synchronize with your computer's e-mail application during a HotSync operation. However, pdQ smartphone does store a back-up copy of the Filed folder on your computer hard drive.

To file a message:

- 1 Open a message.
- 2 Tap  to open the Mail menus.
- 3 Tap File from the Message menu to display the Message File Options dialog.
- 4 Tap No to save the message and move it to the Filed folder or tap Yes to file the message and keep a copy in the Inbox.



Deleting Messages

To remove a message you created from the Filed folder:

- 1 In the Message List screen, tap Filed from the pick list in the upper-right corner to display the contents of the Filed folder.
- 2 Tap the message you want to restore.
- 3 Tap Edit to display and modify the message.



After you display and modify the message, you can send it, save it as a draft, or return it to the Filed folder.

Deleting Messages

pdQ smartphone stores deleted message in the Deleted folder until you synchronize pdQ smartphone with your computer. If you delete a message from pdQ smartphone, it is deleted on your computer's e-mail application after synchronization.

To delete a message:

- 1 Open the message you want to delete.
- 2 Tap Delete.
- 3 If you selected the Preference option to confirm message deletion, tap Yes to confirm that you want to delete the current message.



Removing a Message From the Deleted Folder

You can reverse the deletion of a message (by removing it from the Deleted folder) as long as you have neither performed a HotSync operation nor purged the contents of the Deleted folder.

To remove a message you received from the Deleted folder:

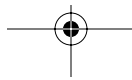
- 1 In the Message List screen, tap Deleted from the pick list in the upper-right corner to display the contents of the Deleted folder.
- 2 Tap the message you want to restore.
- 3 Tap Undelete to move the selected message to the Inbox and mark it as read.

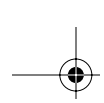
To remove a message you created from the Deleted folder:

- 1 In the Message List screen, tap Deleted from the pick list in the upper-right corner to display the contents of the Deleted folder.
- 2 Tap the message you want to restore.
- 3 Tap Edit to display and modify the message.



After you display and modify the message, you can send it or save






it as a draft.

Purging Deleted Messages

Because pdQ smartphone stores deleted messages in the Deleted folder until you perform a HotSync operation, deleted messages can monopolize storage space. To avoid or correct this problem, you can purge the contents of your Deleted folder. Messages that you purge will still delete from your computer's e-mail application during the next HotSync operation.

To purge the contents of the Deleted folder:

- 1 Tap  to open the Mail menus.
- 2 Tap Purge Deleted from the Message menu.
- 3 When pdQ smartphone displays the Purge Deleted Messages alert, tap Yes to confirm that you want to purge the contents of the Deleted folder.



You cannot restore messages after you purge them.

Message List Options

Message List Options enable you to manage the way the Message List displays information.

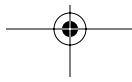
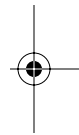
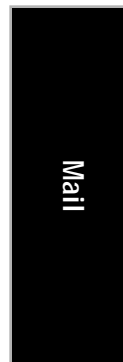
Folders

pdQ smartphone provides five different folders, each pertaining to a particular mail category. The Message List displays the messages in the folder you select. Folders provide an efficient way to manage the mail you send and receive.

To select a folder:

- 1 Tap the pick list in the upper-right corner to open the following list of folders:

- Inbox** Contains the mail from your computer's e-mail application Inbox, minus any that you have excluded using filtering options. See "Creating Special Filters" later in this chapter for details.
- Outbox** Contains the mail you created and sent on pdQ smartphone since the last HotSync operation.



Message List Options

- Deleted** Contains the messages you deleted since the last HotSync operation.
- Filed** Contains the messages you want to store on pdQ smartphone.
- Draft** Contains the messages you created using pdQ smartphone but are not yet ready to send.

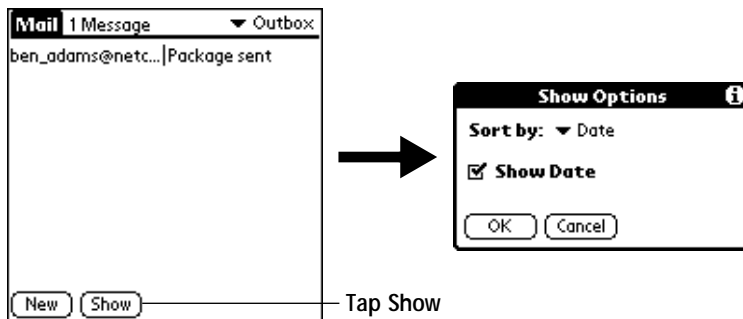
2 Tap to select the folder you want to display in the Message List screen.

Date Column

The Date Column is optional in the Message List. By default, the Date Column is hidden to increase the available screen space.

To show the Date Column:


1 Tap Show in the Message List to open the Show Options dialog.



- 2 Select the Show Date check box to show the Date Column.
- 3 Tap OK to close the Show Options dialog and return to the Message List.

Sorting the Message List

You can sort the Message List by the date it was sent, by the sender or by the subject.

 High-priority messages always appear first, no matter how you sort your message list.

To sort the Message List:

- 1 Tap Show in the Message List to open the Show Options dialog.
- 2 Tap the Sort by pick list and select one of the following options:


- Date** Sorts messages by date and displays the most recent message at the top of the screen.
- Sender** Sorts messages by the sender's user name and displays them in ascending alphabetical order —based on the first word of the sender field.
- Subject** Sorts messages by the subject and displays them in ascending alphabetical order — based on the first word of the subject field.

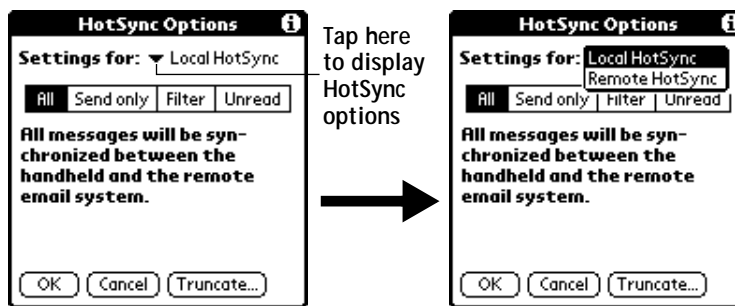
3 Tap OK to close the Show Options dialog and return to the Message List.

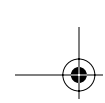
HotSync Options

HotSync Options enable you manage your e-mail more effectively by selecting which messages download when you synchronize your computer and pdQ smartphone. You can define different settings for local and remote synchronization. For example, you may want to download all of your messages during local synchronization and only urgent messages during remote synchronization. Once defined, pdQ smartphone determines if synchronization is occurring locally or remotely and uses the appropriate HotSync Options settings.

To activate the HotSync Options dialog:

- 1 Tap  to open the Mail menus.
- 2 Tap HotSync Options from the Options menu to open the HotSync Options dialog.
- 3 Tap the Settings for pick list and select Local HotSync or Remote HotSync.





Creating Special Filters



For more information about Local and Remote HotSync operations, see the "HotSync" chapter.

- 4 Tap the filtering option you want to apply. The following filtering options are available:

- | | |
|------------------|--|
| All | During synchronization, all of the messages in your computer's e-mail Inbox synchronize with pdQ smartphone and all messages in your pdQ smartphone Outbox are sent to your computer's e-mail application. |
| Send Only | During synchronization, only the messages in the pdQ smartphone Outbox are sent to your computer's e-mail application where they are sent to their final destination. |
| Filter | During synchronization, all messages in the pdQ smartphone Outbox are sent to your computer's e-mail application, and messages in your computer's e-mail Inbox that meet specific criteria download to pdQ smartphone. When you select the Filter setting, the HotSync Options dialog opens and displays additional filter settings. See "Creating Special Filters" for details. |
| Unread | During synchronization, only unread messages download to pdQ smartphone from your computer's e-mail Inbox, and all messages in your pdQ smartphone Outbox are sent to your computer's e-mail application. |

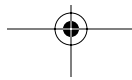


The All setting does not mean that all information included in each message downloads to pdQ smartphone. Truncation settings (explained in a following section) for long messages still apply. Also, Mail never downloads any attachments to pdQ smartphone. The message and any text information appear, but the attachment is left in your computer's e-mail application.

- 5 If you selected All, Send Only or Unread, tap OK to confirm your selection and close the HotSync Options dialog. If you selected Filter, continue to the next section.

Creating Special Filters

You can create special filters to control the type of messages that download to pdQ smartphone during synchronization. Special filters work on the premise of ignoring or retrieving messages that contain specific information

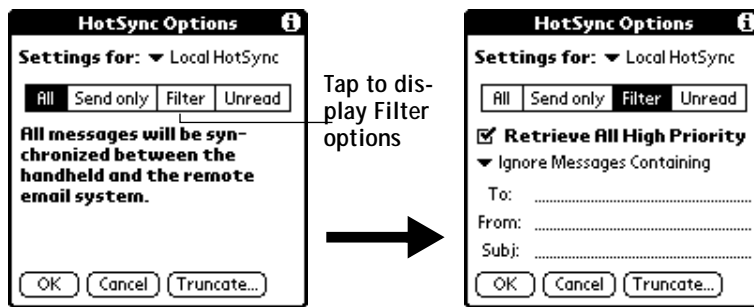


in their header fields.

To create a special filter, you must decide whether you want to ignore or retrieve certain messages. Then, based on that decision, you must tell your pdQ smartphone what it needs to look for in the To, From, and Subject header fields to single out those messages.

To access the special filter settings:

- ▶ Tap the Filter box in the HotSync Options dialog to display the filter settings.

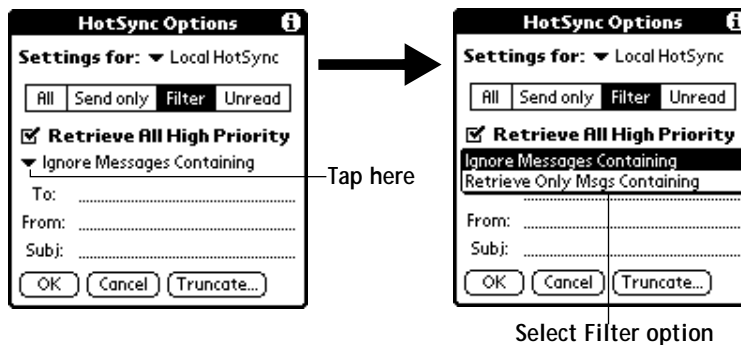


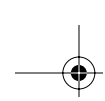
Ignoring or Receiving Messages

The first step in establishing a special filter is to determine whether you want to ignore or retrieve messages that match the information you specify.

To define whether to ignore or receive messages:

- ▶ Tap the pick list in the center of the HotSync Options dialog and select one of the following settings:





Defining Filter Strings

Ignore Messages Containing Tells your pdQ smartphone to *exclude* the messages that meet the defined criteria and download *all other messages* during synchronization. In general, this filter downloads more mail during synchronization because it blocks only one defined subset of mail.

Retrieve Only Messages Containing Tells your Palm III organizer to *include* only the messages that meet the defined criteria and to ignore all other messages during synchronization. This filter has the potential to block more mail during synchronization because it downloads only one subset of mail.

Defining Filter Strings

Messages are filtered based on the information contained in their To, From and Subject header fields. The information that defines what pdQ smartphone is looking for is called a *filter string*. You create a filter string by listing the words you want pdQ smartphone to find and separating them with either a comma or a space. Each word in the filter string is joined by an implicit OR; because of this, you should not enter connecting words such as AND or OR.

To create a more complex filter, you can define filter strings for the To, From and Subject fields simultaneously. pdQ smartphone joins the filter strings for these fields using an implicit AND. Once again, you should not add connecting words. pdQ smartphone will do that for you.

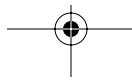
For example, suppose you want to receive only messages from John Smith (jsmith@aol.com) or Jack Jones (jjones@aol.com) concerning the Apollo Project. You would create the following filter strings:

To field filter string: jsmith@aol.com, jjones@aol.com

Subject field filter string: Apollo Project

pdQ smartphone interprets this as, "Accept messages about the Apollo Project from John Smith or Jack Jones. Do not accept messages from other people. Do not accept messages from John or Jack about any other subject."

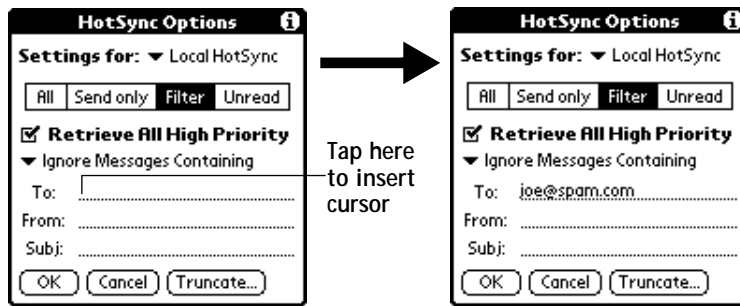
When you define a string, note that pdQ smartphone searches for any instance of that *collection* of characters. For example, if you create a filter that retrieves only messages containing the string "info," pdQ smartphone



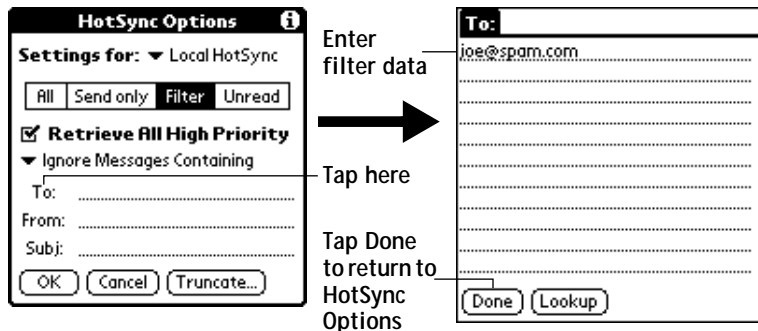
considers "info," "rainforest" and "kinfolk" appropriate matches.

To define filter strings:

- 1 Tap a header field in the HotSync Options dialog.



- 2 Enter your filter string for the selected header field using commas or spaces to separate the words. Do not add connecting words, such as AND or OR, between words in a string.
- 3 If your string exceeds the length of the field, tap the name of the field to display the Notes screen for that header field. For more information about header field Notes screens, see "Creating Messages."



- 4 Tap Done to return to the HotSync Options dialog.
- 5 Tap OK to confirm your filter strings and close the HotSync Options dialog.

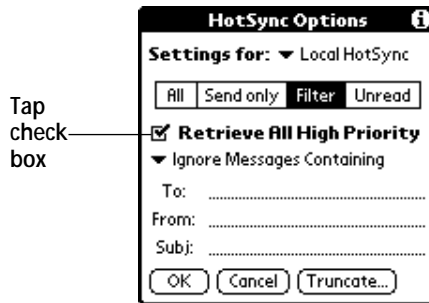
High-Priority Messages

The Retrieve All High Priority setting lets you retrieve messages marked high-priority, even if those messages would have been blocked by a defined filter.


Truncating Messages

To retrieve high-priority messages:

- 1 Tap the Filter box in the HotSync Options dialog to display additional filter options.
- 2 Select the Retrieve All High Priority check box to retrieve all messages marked high-priority.




- 3 Tap OK to confirm your selection and close the HotSync Options dialog.

 This setting is applicable only if your e-mail application has the capacity to flag high-priority messages.

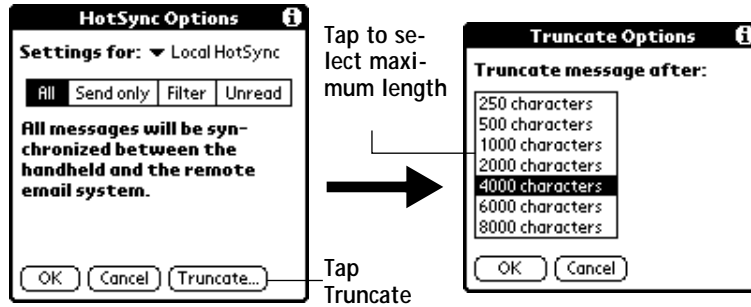
Truncating Messages

The Truncate feature lets you set a point at which long messages truncate when downloading to pdQ smartphone. By default, this Truncate value is 4000 characters. By truncating long messages, you reduce the time it takes to synchronize your computer's e-mail and Mail as well as the amount of storage space e-mail uses on pdQ smartphone.


 Truncation is separate and independent from filtering.

To truncate messages:

- 1 Tap Truncate in the HotSync Options dialog to open the Truncate Options dialog.



- 2 Tap to select the truncation setting you want. The values range from 250 characters to 8000 characters.

 If you select a low truncation value, you will have more room on pdQ smartphone to store messages.

- 3 Tap OK to confirm your selection and return to the HotSync Options dialog.

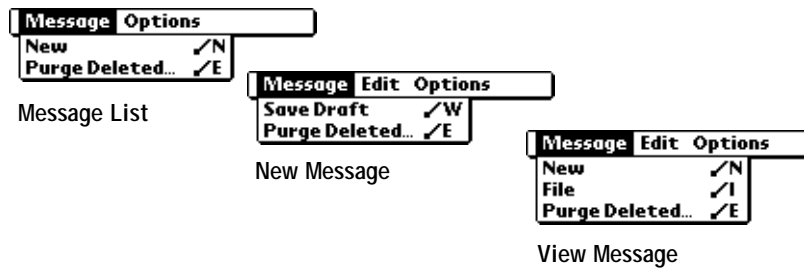
Mail Menu Commands

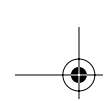
The Mail application includes menu commands to make it fast and easy to perform common file and editing tasks. This section explains the menu commands that are specific to the Mail application.

See "Using Menus" in the *pdQ Basics Handbook* for information about menu commands common to all pdQ smartphone applications.

Message Menu

The Message menu varies based on whether you are viewing a message, creating a message or viewing the Message List.





Mail Menu Commands

- New** Displays the Create Message screen, where you can create a new e-mail message.
- Save Draft** Saves the current message as a draft and moves it to the Draft folder. pdQ smartphone Draft messages until you send or delete them.
- File** Moves the current message to the Filed folder. pdQ smartphone stores Filed messages until you delete them.
- Send** Moves the current message to the Outbox folder. pdQ smartphone stores all sent messages in the Outbox folder until you perform a HotSync operation.
- Delete** Moves the current message to the Deleted folder. pdQ smartphone stores deleted messages in the Deleted folder until you perform a HotSync operation, at which time it permanently removes deleted messages.

Purge Deleted Enables you to empty (purge) the contents of the Deleted folder. pdQ smartphone deleted messages in the Deleted folder until you perform a HotSync operation. By purging deleted messages, you free up storage space on pdQ smartphone before your next HotSync operation.

The Purge Deleted command displays an alert, prompting you to confirm that you want to purge all messages from the Deleted folder. If you tap Yes, all deleted messages are purged from the memory of pdQ smartphone.

Messages that you purge are deleted from your computer's e-mail application during the next HotSync operation.

Options Menu

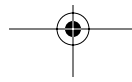
When you select the Options menu, its menu commands vary depending on whether you are creating or editing a message.

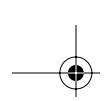


Message List



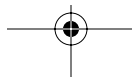
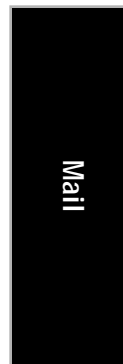
New Message





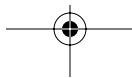
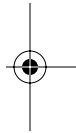
Mail Menu Commands

- Font** Enables you to adjust the size of the text on the screen. This can make it easier to read the text or to fit more text in the display area.
- Preferences** Enables you to define a specific string of text as a signature and to select whether or not pdQ smartphone displays an alert when you delete a message.
- HotSync Options** Opens a dialog, where you can select different ways to filter messages synchronized between your computer's e-mail application and pdQ smartphone. You can create simple or complex filters to control the type of messages downloaded to pdQ smartphone. In addition, you can define separate settings for local and remote synchronizations.
- Look Up** Opens a dialog, which contains the Address List from your Address Book. By tapping a selection, you enter that address into the To field of any message you are creating.
- The Look Up command is available only when you are creating a message.
- About Mail** Shows version (revision) information for the Mail application.





Mail Menu Commands



Chapter 9

Memo Pad



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

With the Memo Pad, you can:

- Take notes or write any kind of message on your pdQ™ smartphone.
- Drag and drop memos into popular computer applications like Microsoft Word, when you synchronize using Palm™ Desktop software and HotSync® technology.
- Assign categories for memos. This enables you to quickly view just your business-related memos, personal memos or any other category that you define.
- Quickly jot down phone numbers and other types of information. Later, you can copy and paste this information to other applications.

To open the Memo Pad:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Memo List screen.




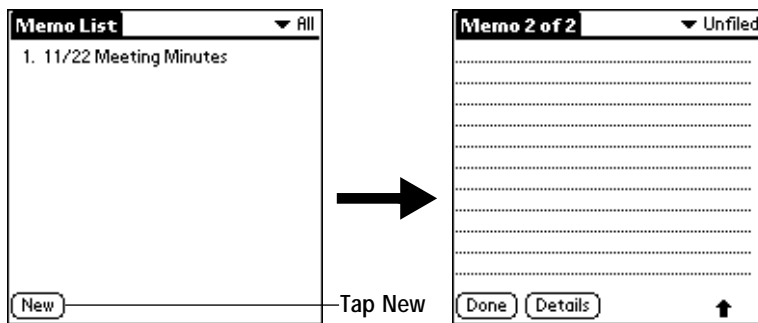
Working With Memos


A memo is where you enter, review and modify the individual Memo Pad entries. A memo can contain up to 4,000 characters; the number of memos you can store is dependent only on the memory available on pdQ smartphone.

Working With Memos

To create a new memo:

- 1 Tap  to display the Memo List screen.
- 2 Tap New to create a new memo.



 In the Memo List screen, you can also begin writing in the Graffiti® writing area to create a new memo. The first letter is automatically capitalized and begins your new memo.

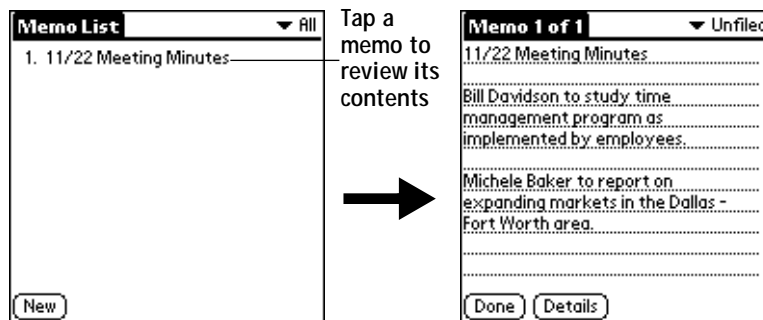
- 3 Enter the text you want to appear in the memo. Use the carriage return stroke to move down to new lines in the memo.
- 4 After you finish, tap Done to return to the Memo List screen.

Reviewing Memos

Each time you create a memo, the first line of the memo appears in the Memo List screen. This makes it easy to locate and review your memos.

To review the contents of a memo:

- 1 Tap the text of the memo that appears in the Memo List screen to display the memo on the screen.




- 2 Review or edit the text in the memo.

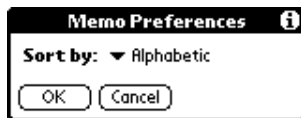
- 3 Tap Done to save your changes to the memo and return to the Memo List screen.

Arranging Memos

The Memo Preferences dialog enables you to sort your memos alphabetically or in any order that you want.

To select a sort option:


- 1 Tap  to open the Memo Pad menus in the Memo List screen.
- 2 Tap Preferences from the Options menu to open the Memo Preferences dialog.



- 3 Tap the Sort by pick list and choose Manual or Alphabetic.
- 4 Tap OK to close the Memo Preferences dialog and activate your setting.

Manually Arranging the Memo List

If you choose the Manual option for the Sort by setting, you can manually rearrange the order of the memos in the Memo List screen. When you rearrange your memos, pdQ smartphone rennumbers all the memos to reflect the new order.

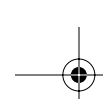
 The Manual setting of the Memo Preferences is not transferred to Palm Desktop. If you choose to display your memos alphabetically on Palm Desktop and then perform a HotSync operation, the arrangement of the memos on pdQ smartphone will still be in the order defined in the Memo Preferences setting.

To rearrange the order of your memos:

- 1 Select the Manual option in the Preferences dialog as described in the previous procedure.
- 2 In the Memo List screen, tap and drag the memo to a new location in the list. When you lift the stylus from pdQ smartphone's screen, the memo appears in its new location.

Choosing a Memo Category

Categories are used to file individual memos items into groups for easy review. You can assign and edit categories by using the Categories pick list (in the upper-right corner of the screen) or the Details dialog. See "Using



Marking a Private Memo

Categories” in the *pdQ Basics Handbook* for a complete description of categories.

Marking a Private Memo

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

To mark a memo as private:

- 1 Tap the memo you want to mark as private to display it on the screen.
- 2 Tap Details to open the Memo Details dialog for that memo.



- 3 Select the Private check box.
- 4 Tap OK to close the Memo Details dialog and return to the memo screen.

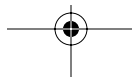


Deleting a Memo

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

To delete a memo with the Memo Details dialog:

- 1 Tap the memo that you want to delete to display it on the screen.
- 2 Tap Details to open the Memo Details dialog.
- 3 Tap Delete to open the Delete Memo alert.
- 4 Tap OK to confirm that you want to delete the current memo.

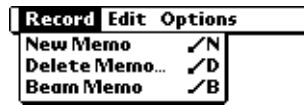
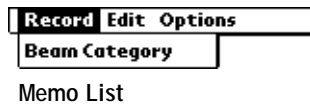


Memo Pad Menu Commands

The Memo Pad includes menu commands to make it fast and easy to perform common file and editing tasks. See "Using Menus" in the *pdQ Basics Handbook* for information about menu commands common to all pdQ smartphone applications.

Record Menu

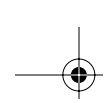
When you select the Record menu, its commands appear on screen.



Memo screen

- New Memo** Creates a new memo.
- Delete Memo** Opens an alert dialog, prompting you to confirm that you want to delete the current memo. Tap OK to delete the memo from pdQ smartphone, or tap Cancel to close the alert dialog and keep the memo.

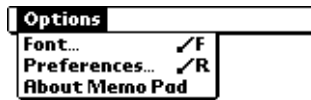
By default pdQ smartphone removes the memo from the Memo List, but retains a copy of the memo and transfers it to an archive file on your computer the next time you perform a HotSync operation. To remove the memo completely, clear the Save archive copy on PC check box.
- Beam Memo** Beams the current memo to another pdQ smartphone through the IR port.
- Beam Category** Beams all memos in the current category to another pdQ smartphone through the IR port.



Memo Pad Menu Commands

Options Menu

When you select the Options menu, its commands appear on screen.

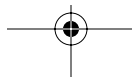


Memo List



Memo screen

- | | |
|-----------------------------|--|
| Font | Opens the Select Font dialog where you can choose a different font (text) style for your Memo Pad entries. See "Choosing Fonts" in the <i>pdQ Basics Handbook</i> for details. |
| Go to Top of Page | Moves to the top (first) line of the memo. |
| Go to Bottom of Page | Moves to the bottom (last) line of the memo. |
| Phone Lookup | Activates the Phone Lookup feature, which is described in "Using Phone Lookup" in the <i>pdQ Basics Handbook</i> . |
| Preferences | Activates the Memo Preferences dialog and enables you to define the sort order for your memos. |
| About Memo Pad | Shows version (revision) information for the Memo Pad application. |



Chapter 10

pdQ SMS





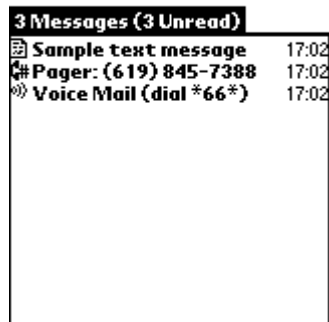
pdQ SMS lets you know if you have received text or pager messages and whether or not your voice mailbox contains voice mail. Your service provider gives you the number to call to check for voice mail, which is entered in Phone Preferences. *Chapter 2 Getting Started* in the *pdQ Basics Handbook* explains how to define phone preferences.

With pdQ SMS, you can:



- Distinguish between read and unread messages. All unread messages appear in **bold** while read messages appear as plain text.
- Learn whether or not your voice mail box contains voice mail messages.
- Respond to text and pager messages directly.

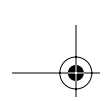
To open pdQ SMS:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to open pdQ SMS.





To return a page:

- 1 Open the keypad, then tap  on the pdQ smartphone screen to turn on the phone.
- 2 Tap  to open pdQ SMS.
- 3 Tap the call back phone number.

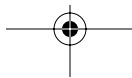


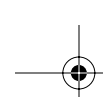
To check for voice mail:

- 1 Open the keypad, then tap  on the pdQ smartphone screen to turn on the phone.
- 2 Tap  to open pdQ SMS.
- 3 Tap the voice mail line entry number.

To remove all entries in pdQ SMS:

- ▶ Tap Purge to remove all acknowledged messages from pdQ SMS.





Chapter 11

pdQmail



Welcome to pdQmail™, the most powerful and versatile e-mail application available for the Palm III™ operating system. You can use pdQmail to send, receive, create, and manage e-mail messages directly from the pdQ smartphone. This capability makes it easier than ever to stay in touch with the added convenience that only a wireless smartphone you can hold in one hand provides.



pdQ smartphone is delivered with two e-mail applications: Mail and pdQmail. Mail lets you read, store, and delete e-mail messages received on your computer and to create e-mail messages. To transfer e-mail messages between pdQ smartphone and your computer, you need to synchronize the pdQ smartphone and your computer. You cannot use Mail to send or receive e-mail messages from pdQ smartphone.

Before using pdQmail to send or receive e-mail messages, you need to define:

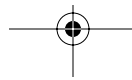
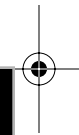
- Modem preferences
- Network preferences
- pdQmail preferences

pdQmail preferences include adding a signature to your e-mail messages and setting a priority. For detailed information, see the *pdQ Basics Handbook*.

With pdQmail, you can:

- Write, send, forward, and receive e-mail messages using pdQ smartphone.
- Define up to 15 mailboxes for storing e-mail you send or receive.
- Include a personal signature and other details in your e-mail messages.
- Limit the number of lines in e-mail messages that display on the pdQ smartphone screen.

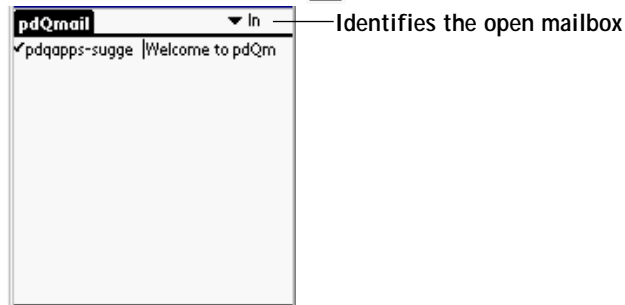
pdQmail



Starting pdQmail and Disconnecting From the Network




To open pdQmail:

- ▶ Open the keypad, then tap  to display the pdQmail In mailbox.




Starting pdQmail and Disconnecting From the Network

To start pdQmail:

- 1 Open the keypad, then tap  to turn on the phone.
- 2 Tap  to open the Applications Launcher.
- 3 Tap  to display the last screen you worked on.


To disconnect from the network:


- 1 While in pdQmail, tap .
- 2 Tap Disconnect from the Mail menu.

Checking For and Viewing E-mail Messages

The Message List lists incoming messages, who sent them, and the date they were received. After your mail is delivered, it is listed by e-mail name, subject, and date. You need to select and open your mail messages.

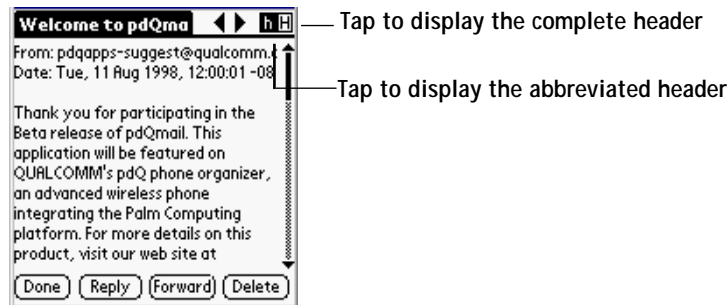
To check for e-mail messages:

- 1 Tap  from pdQmail.
- 2 Tap Check Mail from the Mail menu.

 A progress window shows your dial-up and service connection progress.

To open an e-mail message:

- ▶ Tap to select the message in the desired mailbox.




Displaying Complete Header Information

By default, pdQmail displays abbreviated header information. The abbreviated header displays only the From and Date fields. The complete header includes the From, Date, Subject, and Cc fields. The same header type displays for all messages.

To display complete header information:


- 1 Open an e-mail message.
- 2 Tap **H** in the upper right corner of the screen.

 To display the abbreviated header, tap **h**.


Creating E-mail Messages

You create e-mail messages with pdQmail the same way you create messages with your computer's e-mail application: you identify the e-mail recipient(s), define a subject, and write the e-mail.

You create messages and replies in the Message Composition screen. All messages must, at the very least, contain a valid e-mail address in the To field. It is also a good idea to include a subject.

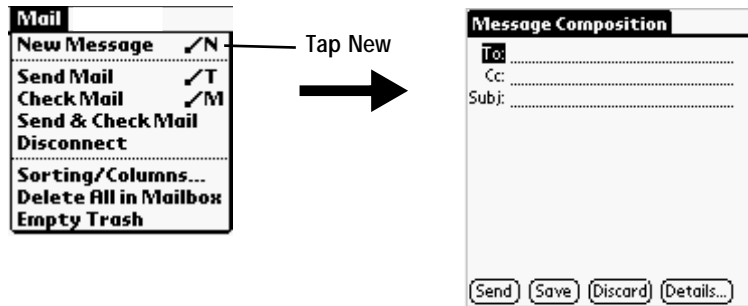
 When writing or editing an e-mail message, use the Edit menu to Undo, Cut, Copy, Paste, and Select All.

To create an e-mail message:


- 1 From pdQmail, tap  to display pdQmail menus at the top of the screen.
- 2 Tap New Message from the Mail menu to display the Message Composition screen.



Creating E-mail Messages



- 3 Tap the To line, then use the stylus to write Graffiti® script or use the on-screen keyboard to enter the e-mail address of the recipient.

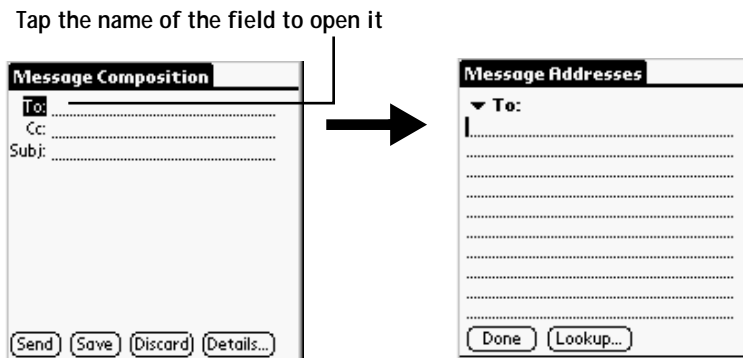
 To send a copy of this message to additional recipients, tap the Cc line, then enter the e-mail address for each additional recipient. Be sure to separate each address with a comma followed by a space.

- 4 Tap the Subj line, then enter a subject for your e-mail message.
- 5 Tap the Body line, then enter the body text.
- 6 Tap Send to either place the e-mail message in your Out mailbox or send it immediately when pdQ is connected to the network.

To extend the screen display:

If the To or Cc field requires more space than what is available, you can extend the screen display.

- 1 Tap the field name (for example, "To") to expand that field.



- 2 Enter the appropriate information.
- 3 Tap Done to return to the Message Composition screen.

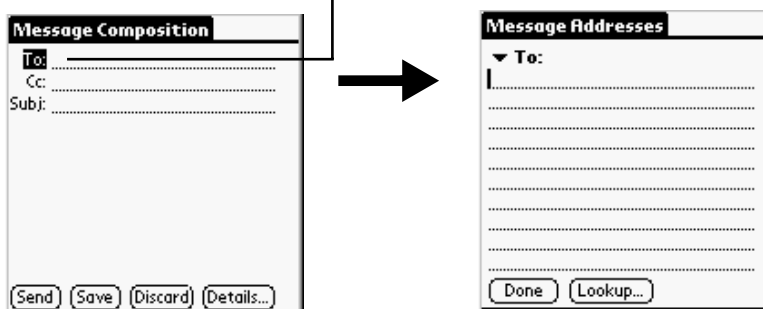
Looking Up an Address

You can look up a recipient's e-mail address from the Address Book directly. You can either tap Lookup or use the Command stroke /L from the Message Address screen.

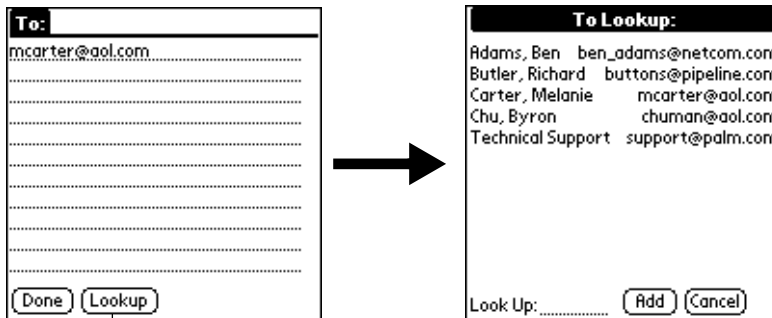
To look up an address:

- 1 Tap the To or CC field name to expand the field.

Tap To or Cc to open the screen



- 2 Enter a few letters of the address you want to find on the first line, then tap Lookup.
- 3 If the letters you enter identify a unique listing from your Address Book, pdQ smartphone completes the address for you. If not, the Lookup dialog appears.



Tap here

- 4 Tap an address to select it.
- 5 Tap Add to enter the address in the To or Cc field.

Sending Messages

Tap here to enter address in field

Sending Messages


When you send messages from the pdQ smartphone, it stores them in the Out mailbox folder until you either establish a network connection or the next time you synchronize the pdQ smartphone with your computer.

To send a message:

- ▶ Tap Send in the Message Composition screen after you create a message.

To send a blind carbon copy (Bcc) e-mail message:

You can forward a copy of all e-mail messages you send to someone without other e-mail recipients knowing it.

- 1 Tap  to display pdQmail menus at the top of the screen.
- 2 Tap Options, then Mail Sending Options to display the Mail Sending Preferences screen. Then tap More Prefs.

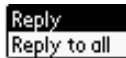
Tap here

Replying to E-mail Messages

You can respond to an e-mail message directly or forward it to others.

To reply to a message:

- 1 Tap the message you want to respond to.
- 2 Tap Reply to open the Reply Options dialog.



- 3 Tap Reply to only respond to the Sender. Tap Reply to all to reply to the sender and all recipients receiving a copy of the message.



You have several message options to choose from, such as setting a priority for the e-mail message. See "Adding Message Details" earlier in this chapter for more information.

- 4 Enter your response or edit the content as needed.
- 5 Tap Send to place your reply in the Out mailbox.

Forwarding a Message

You can forward any message you receive to someone else.

To forward a message:

- 1 In the open message, tap Forward. A new message window is displayed with your address, the original subject trailed by "Fwd," and the original sender's text quoted in the message body.
- 2 Make any changes you want, and enter the recipient's address in the To field. The message can then be sent or saved in the Out mailbox for further changes.



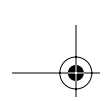
If you forward an outgoing message, attachments received are never included.

pdQMail

Closing E-mail Messages

To close an e-mail message:

- ▶ Tap Done to close the message and return to the Message List.



Deleting Messages

Deleting Messages

To delete a message:

- 1 Open the message you want to delete.
- 2 Tap Delete.




The message is transferred to your Trash mailbox. When you delete messages from the Trash, it is deleted from your pdQ smartphone.

Disconnecting from the Server

After sending and receiving e-mail messages, you need to disconnect from the server.


To disconnect from the server:

- ▶ Tap , then Disconnect from the Mail menu.

Changing Your Password

These instructions explain how to change the password on the server.

To change your password when checking for mail:

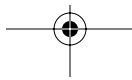
- 1 To display pdQmail menus at the top of the screen, tap .
- 2 Tap Options, then Change Password to display the dialog below.



- 3 In the Old password field, enter your current password.
- 4 In the New password field, enter you new password.
- 5 Click OK. pdQmail connects to the server and changes your password.

Working with Mailboxes


Mailboxes contain all of your incoming and outgoing message header information. When you first start pdQmail, the In mailbox displays with its list of messages. The In, Out, and Trash mailboxes are included with pdQmail. You can create more mailboxes if you need them.



Creating Mailboxes

You can create up to 15 mailboxes for storing e-mail messages you send and receive. Once you open a message, you can file it in a mailbox.

To create a mailbox:

- 1 Open an e-mail message, then tap .
- 2 Tap File in Mailbox from the Message menu.



- 3 Tap New Mailbox from the Mailbox list.




- 4 Tap the New Mailbox line, then enter the name of the new mailbox.
- 5 When finished, tap OK.

Displaying the Mailbox List

You can display your list of mailboxes from any mailbox. The number of messages within each mailbox appears in parentheses to the right of the mailbox name.

To display the list of mailboxes:

- 1 Start pdQmail.
- 2 Tap  next to a mailbox name.




Working with Mailboxes



Filing a Message in a Mailbox

Once you have created mailboxes, you can transfer any message you retrieve to a mailbox of your choice.

To file a message in a mailbox:

- 1 Tap to select and open a message.
- 2 Tap  to open the pdQmail menus.
- 3 Tap Message, then File in Mailbox.





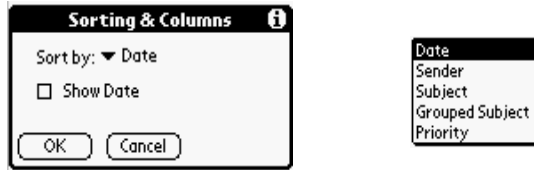
- 4 To transfer the message, tap the mailbox displayed in the list. The message is transferred to that mailbox.

Sorting E-mail Messages

You can sort incoming e-mail by date, sender, subject, grouped subject, or priority. High-priority messages always appear first, no matter how you sort your messages in a mailbox.

To sort your messages in a mailbox:


- 1 Tap  to the left of the mailbox whose e-mail messages you want to sort.
- 2 Tap , then Mail.
- 3 Tap Sorting/Columns.



4 Tap Sort by ▼ to display the list of sorting options:

- Date** Sorts messages by date and displays the most recent message at the top of the screen.
- Sender** Sorts messages by the sender's user name and displays them in ascending alphabetical order —based on the first word of the sender field.
- Subject** Sorts messages by the subject and displays them in ascending alphabetical order — based on the first word of the subject field.
- Grouped Subject** Sorts messages by group, then groups are sorted by date (oldest to current).
- Priority** Sorts by priority (highest to lowest).


5 Tap the sort option you want to use, then tap OK when finished.


 If you want to display the day an e-mail message was sent or received, check the Show Date check box.

6 When finished, tap OK.


Deleting E-mail Messages from a Mailbox

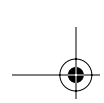
To delete all of the messages in a mailbox:

- 1 Open the mailbox that contains the messages you want to delete.
- 2 Tap , then Mail.
- 3 Tap Delete All in Mailbox.

 All of the messages are placed in the Trash. Empty the Trash to permanently delete the email-messages from pdQ smartphone.

To empty the Trash:

- 1 Tap , then Mail.
- 2 Tap Empty Trash.



pdQmail Shortcuts

pdQmail includes shortcuts that give you quick access to menu options. Shortcuts, entered using Graffiti script, appear to the right of applicable menu options.



To use a shortcut:

- ▶ Write / and then the letter that corresponds to the shortcut you want to use in the left side of the Graffiti writing area.

Managing pdQmail Attachments

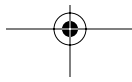
If an incoming message includes an attachment, pdQmail displays only the name and file extension of the file but will not deliver the attachment because of the file size limitation of the pdQ smartphone. Attachment information is usually at the end of a message. If there is more than one file attached to the message, pdQmail provides information only on the first one. You need to open attachments from the application after downloading them to your computer.

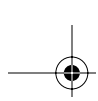
Working with Different Types of Text

pdQmail displays plain, "text/enriched," and Hyper Text Markup Language (HTML) text and saves it until you perform HotSync. pdQmail also:


- Converts HTML to plain text
- Handles sets and encodings for U.S. English and many European languages
- Handles a limited amount of Unencode (an encoding type)

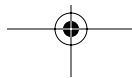
When sending HTML formatted e-mail, usually two copies of the message are included, the first in plain text, the second in HTML formatted text. When pdQmail encounters this, it displays the text version of the message if the HTML formatted text has not been completely retrieved. Then, if you retrieve the rest of the message, the message text you see won't change, but you will see the added HTML formatted text.

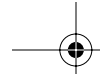




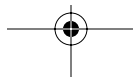
Getting Help

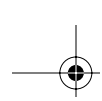
In pdQmail, tap  in the upper-right corner of the window to display help text. Click the up or down arrow on the lower-right to display more help text.





Getting Help





Chapter 12

Web



The pdQ smartphone web application, Web, is one of QUALCOMM's newest wireless communications solutions. It defines a new Internet browser standard and gives you quick access to Internet sites. Web makes moving between sites and scrolling through documents a snap. As an added bonus, internet searches exclude banners and graphics, which saves you time. Once Web is set up, it takes only a couple of taps to visit an Internet site anywhere in the world!

Before searching the Internet, you need to define:

- Modem preferences
- Network preferences

You also need to establish an account for network services with an Internet Service Provider (ISP). The *pdQ Basics Handbook* lists the information the ISP provides.

With Web, you can:

- Create an unlimited number of bookmarks (web addresses).
- Sort web site bookmarks by categories.
- Navigate the web using a scroll bar and hotlinks.

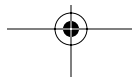
You can use the Web to perform operations like these:

- Tap the scroll bar on the right of the screen to scroll through text.
- Tap the arrows on the bottom of the screen to move forward and backward.
- Tap bold text to visit a different site.

Here are a few more tips for getting around:

- Tap Details to learn more about a site.
- Tap Bookmark this Page to add a bookmark.
- Tap Refresh this Page to reload the site.

Web




Starting and Disconnecting from the Internet



Starting and Disconnecting from the Internet

To start Web:

- 1 Open the keypad, then tap  to turn on the phone.
- 2 Tap  to display the Applications Launcher.
- 3 Tap  to display the web's Bookmark screen.


 If a web page displays, tap the Bookmarks button at the bottom of the screen.


To disconnect from the Internet:

- ▶ While in Web, tap  to close it then  to turn off the phone.

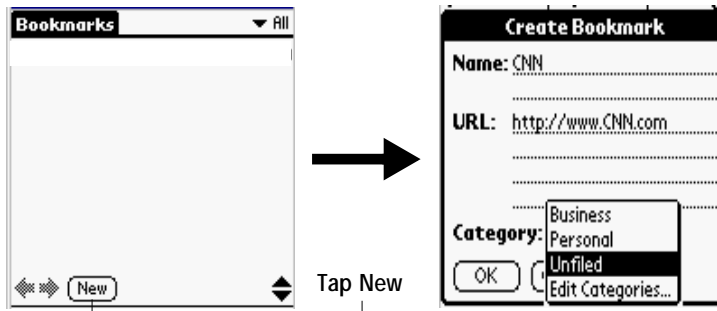
Adding, Editing, or Deleting a Bookmark

To add a bookmark:

- 1 Tap  from the Applications Launcher to display the Bookmarks screen.


 If you are connected to your server, the last Internet site you accessed appears instead of the Bookmarks screen. To display the Bookmarks screen, tap Bookmarks at the bottom left of the screen.


- 2 To set up a new web address, tap New to open the Create Bookmark dialog box.

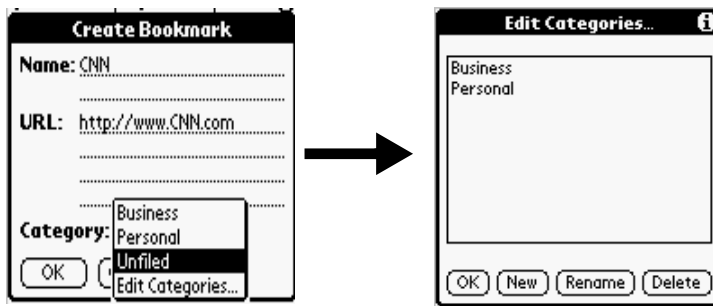


Adding, Editing, or Deleting a Bookmark

- 3 In the URL field, enter the name for the web site you wish to access (for example, CNN). The `www` and the `.com` are automatically added to the name. Notice that the name you enter in the URL field appears in the Name field. You may edit this field if you wish. Whatever appears in the Name field appears in the bookmark list on the Bookmarks screen.

 The content of the Name field appears in the bookmark list on the Bookmarks screen.



- 4 Tap  to open the Edit Categories dialog.
- 5 Select the category that best describes this web site. There are a few preset categories, but you may add, delete, or rename categories at any time by selecting Edit Categories from the Category drop-down menu. The Edit Categories screen displays.
- 6 Tap the category you want to assign to the bookmark, then tap OK.



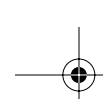
- 7 To add a new category, tap New; or to edit a category, select it and tap Edit. The Edit Categories dialog box appears prompting you to enter the name of the new category or edit the existing category.



- 8 When finished, tap OK.


 On the Bookmarks screen, notice  at the top-right of the screen. Tap the arrow to display the drop-down category list, and you can choose the category of the bookmarks you want to display. Also, if you tap Edit Categories, the Edit Categories screen displays.






Connecting to the Internet

To edit a bookmark:

- 1 Tap  that corresponds to the bookmark you want to edit.
- 2 Edit the information you want to change, then tap OK when finished.

To delete a bookmark:

- 1 Tap  that corresponds to the bookmark you want to delete.
- 2 Tap Delete, then tap OK twice.

Connecting to the Internet

Once you have defined bookmarks, you are now ready to connect to the Internet and to the bookmark's particular web site. You can also connect to the Internet using an address that is not set up as a bookmark. This is done via a menu option.

Connecting Using a Bookmark

You can connect directly to the Internet from one of your preset bookmarks.

To connect to the Internet using a bookmark:



- ▶ On the Bookmarks screen, tap the name of the bookmark. The Service Connection Progress screen shows the progress of the phone connection.



If you don't have a bookmark set up for a certain web address, you can still access its page.

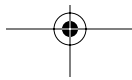
Connecting Using an Address that Is Not a Bookmark

To access a web site without using a Bookmark:

- 1 To turn on the phone, tap  on the pdQ smartphone screen.
- 2 To display web menus at the top of the screen, tap .
- 3 From the Options menu, tap Visit Location.



- 4 The cursor is positioned between the two periods in the URL field. Enter the name of the web site.




Copying Text from an Internet Site to Applications

- 5 Tap OK. The Service Connection Progress screen shows the progress of the phone connection. Once connected to the Internet, you should be at the desired web site.

Copying Text from an Internet Site to Applications

You can copy information from an Internet site and paste it into any application that supports cut and paste operations.


To copy text from an Internet site to an application:

- 1 Tap and drag across the text you want to copy to highlight it.
- 2 Tap , then tap Edit.
- 3 Tap Copy to place the highlighted text on the pdQ smartphone clipboard.
- 4 Launch an application that supports cut and paste operations, then tap where you want to insert the text.
- 5 Tap Edit, then paste to insert the copied text.

Setting Up Web Preferences

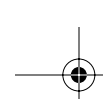
You can set up how much cache memory you want on the pdQ smartphone to control your access speed to the Internet.

To display the Web Preferences dialog box:

- 1 To display Web menus at the top of the screen, tap .
- 2 From the Options menu, choose Preferences.



- 3 In the Maximum Cache Size field, enter the memory size of the cache. If you want to delete the cache, tap Delete Cache.
- 4 When finished, tap OK.




Disconnecting from the Internet

Disconnecting from the Internet

Remember to disconnect from the Internet when you are finished searching.

To disconnect from the Internet:

- 1 To display Web menus at the top of the screen, tap .
- 2 Tap Options, then tap Disconnect to end your Internet session.

Web Shortcuts


Use shortcuts, which appear to the right of each menu option, to display menus and menu options. To perform a shortcut, draw a diagonal line from the bottom-left to the top-right of the graffiti area of your pdQ smartphone, then write the appropriate letter.

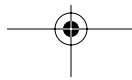


To use a Shortcut:

- ▶ Write / and then the letter that corresponds to the Shortcut you want to use in the left side of the Graffiti writing area.


Getting Help

In the Web application, tap  from the upper-right corner of the dialog box to get help. Tap the up or down arrow on the lower-right to display more help text.



Chapter 13



Preferences

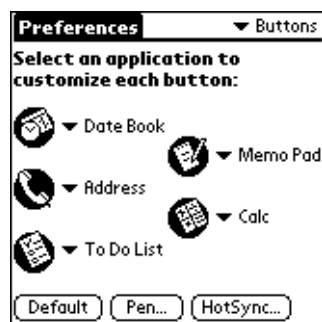
 The Preferences screens enable you to customize the configuration options on your pdQ™ smartphone. If you want to define a preference that is not described in this chapter, refer to the *pdQ Basics Handbook*.

With the Preferences screens, you can:

- Set the current date and time, the auto shut-off interval, and the system, alarm and game sounds.
- Set the display format for dates, times and numbers.
- Assign your name, phone number and other owner information to pdQ smartphone.
- Assign different applications to the buttons on the front panel of pdQ smartphone.
- Define a list of Graffiti® abbreviations.
- Align the screen on pdQ smartphone.
- Configure pdQ smartphone for use with a network.

To open the Preferences screens:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the last Preferences screen you used.



- 3 Tap the pick list in the upper-right corner to select the Preferences screen you want to view.

Buttons Preferences

Buttons Preferences

The Buttons Preferences screen enables you to associate different applications with the buttons on the front of pdQ smartphone.

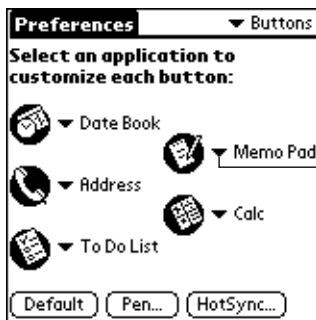
For example, if you find that you seldom use the To Do List application and often use the Expense application, you can assign the To Do List button to start the Expense application.

Any changes you make in the Buttons Preferences screen become effective immediately; you do not have to change to a different screen or application.

If you assign a different application to a button, you can still access the original application using the Applications Launcher. See "Selecting Applications" in the *pdQ Basics Handbook*.

To change the Buttons Preferences:

- 1 Tap the pick list next to the button you want to assign in the Buttons Preferences screen to display a list of all the applications installed on pdQ smartphone.



Tap arrow to show pick list

- 2 Tap the application that you want to assign to the button.

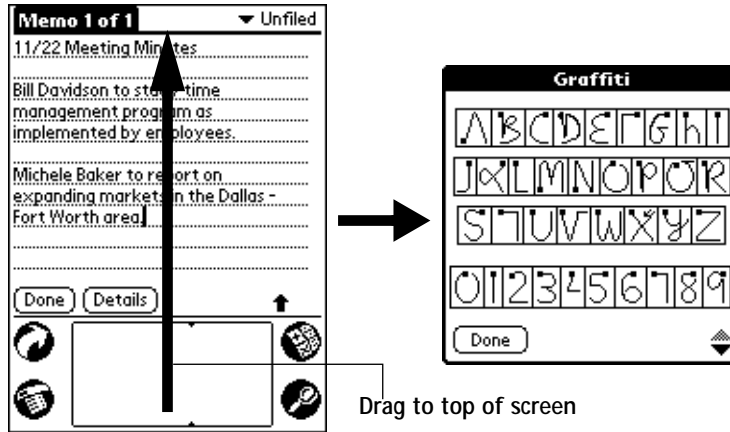


To restore all of the buttons to their factory settings, tap the Default button.

Pen Preferences

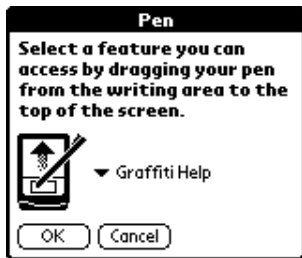
The Buttons Preferences screen enables you to change the Button assignment of the full-screen pen stroke. By default, the full-screen pen stroke activates the Graffiti Help dialog.

Buttons Preferences



To change the Pen preferences:

- 1 Tap Pen in the Buttons Preferences screen to open the Pen dialog.



- 2 Tap the pick list and select one of the following settings for the full-screen pen stroke:

- Backlight** Activates the backlight feature of pdQ smartphone. You can use this setting instead of the power button to turn the backlight on and off.
- Keyboard** Activates the on-screen keyboard for entering text characters.
- Graffiti Help** Activates a series of screens that show the complete Graffiti pen stroke character set.

Digitizer Preferences

Turn Off & Lock Turns off and locks pdQ smartphone. You must assign a password to lock pdQ smartphone. When locked, you need to enter the password to use pdQ smartphone.

Beam Data Beams the current entry to another pdQ smartphone.

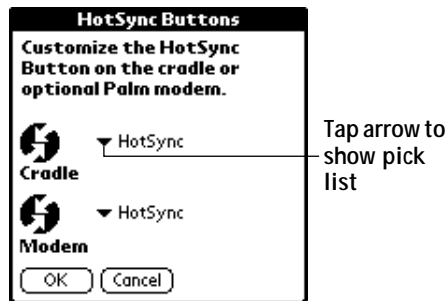
- 3 Tap OK to complete your selection and return to the Buttons Preferences screen.

HotSync® Buttons Preferences

Any changes that you make in the HotSync Buttons dialog become effective immediately; you do not have to change to a different screen or application.

To change the HotSync Buttons preferences:

- 1 Tap HotSync in the Buttons Preferences screen to open the HotSync Buttons dialog.
- 2 Tap the pick list next to the button you want to assign to display a list of all the applications installed on pdQ smartphone.



- 3 Tap the application that you want to assign to each button. The default setting for each button is the HotSync setting, which means the cradle.

Digitizer Preferences

The Digitizer Preferences screen activates the digitizer calibration screen. This is the same screen that appears when you start pdQ smartphone for the first time. A complete description of how to use the digitizer calibration screen appears in the "Aligning the Screen" section in the *pdQ Basics Handbook*.

Formats Preferences

Use the Formats Preferences screen to set the display format of the dates, times and numbers on pdQ smartphone.

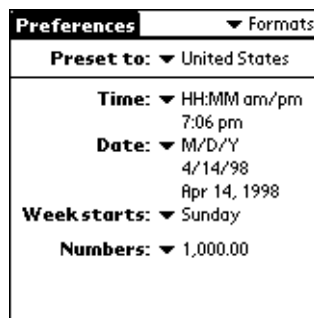
Country Default

The country default sets date, time, week start day, and number conventions based on geographic regions where you might use pdQ smartphone. For example, in the United Kingdom, time often is expressed based on a 24-hour clock. In the United States it is based on a 12-hour clock with an AM or PM suffix.

All pdQ smartphone applications use the Country default settings. You can, however, customize your own preferences as described in the "Time, Date, Week Start and Numbers Formats" section later in this chapter.

To set the country default:

- 1 Tap the country name in the Formats Preferences screen to open the Country pick list.



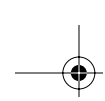
- 2 Tap the setting you want to use.

Time, Date, Week Start and Numbers Formats

The Time setting defines the format for the time of day. The time format that you select appears in all applications on pdQ smartphone.

To select the Time, Date, Week start and Numbers format:

- 1 Tap the Time pick list in the Formats Preferences screen, and select the format that you want for pdQ smartphone.
- 2 Tap the Date pick list and select the format you want to use.
- 3 Tap the Week starts pick list and select whether you want the first day of the week to be either Sunday or Monday.



General Preferences



This setting controls the Day, Week and Month views in the Date Book application and all other aspects of pdQ that display a calendar.

- 4 Tap the Numbers pick list and select the format that you want for pdQ smartphone.

General Preferences

The General Preferences screen is where you set the time, date, auto shut-off interval and sounds for pdQ smartphone.

Auto-Off Delay

pdQ smartphone has an automatic shutoff feature that turns off the power and backlight after a period of inactivity. This feature helps conserve battery power in case you forget to turn off pdQ smartphone.

If you find that pdQ smartphone shuts itself off before you finish reviewing the information on the screen, you should increase the time setting of the automatic shutoff feature.

To set the Auto-off delay:

- 1 Tap the Auto-off after setting in the General Preferences screen to open the pick list.
- 2 Tap the setting you want to use for the automatic shutoff feature. You can choose a delay of 1 minute, 2 minutes or 3 minutes.

System, Alarm and Game Sounds

pdQ smartphone uses a variety of sounds. The System, Alarm and Game Sound settings enable you to turn the sounds on or off, and to adjust the volume level.

To set the system and alarm sounds:

- 1 Tap the System Sound pick list in the General Preferences screen and select the sound level.

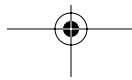


When you turn off the System Sounds, you also turn off the "chime" tones associated with the HotSync operation.

- 2 Tap the Alarm Sound pick list and select the sound level.
- 3 Tap the Game Sound pick list and select the sound level.



The Game Sound setting works only with games that are programmed to respond to this setting. Older games typically do not respond to this setting.




Working with Service Templates

The *pdQ Basics Handbook* describes how to define fields for service template.


Creating Additional Service Templates

You can create additional service templates from scratch or by duplicating existing templates and editing information. After you create a new or duplicate template, you can add and edit settings.

To add a new service template:

- 1 Tap  in the Network Preferences screen to open the menus.
- 2 Tap New from the Service menu to create a new service template (called Untitled) to the Service pick list and display it in the Network Preferences screen.


To duplicate an existing service template:

- 1 Tap the Service pick list in the Network Preference screen to open a list of all the predefined service templates.
- 2 Tap the service you want to duplicate.
- 3 Tap  to open the Network Preferences menus.
- 4 Tap Duplicate from the Service menu to add a copy of the service template to the Service pick list and display it in the Network Preferences screen.

Deleting a Service Template

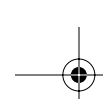
There is only one way to delete a service template: use the Delete command from the Service menu.

To delete a service template:

- 1 Tap the Service pick list in the Network Preference screen to open a list of available service templates.
- 2 Tap the service you want to delete.
- 3 Tap  to open the menus for the Network Preferences screen.
- 4 Tap Delete from the Service menu to display the Delete Service alert.
- 5 Tap OK to confirm that you want to delete the service template.

Network Preferences Menu Commands

The Network Preferences screen includes menu commands to make it fast and easy to create and edit service templates. This section explains the menu commands that are specific to the TCP/IP application.

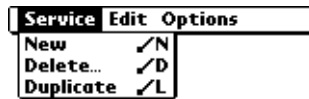


Network Preferences Menu Commands

See "Using Menus" in the *pdQ Basics Handbook* for information about menu commands that are common to all of pdQ smartphone applications.

Service Menu

When you select the Service menu, its commands appear on screen.



Options Menu

- New** Creates a new (empty) service template and adds it to the Service pick list.
- Delete** Deletes a selected service template from the Service pick list.
- Duplicate** Copies the selected service template and adds it to the Service pick list.

When you select the Options menu, its command appears on screen:



- View Log** Displays the Network Log screen

TCP/IP Troubleshooting

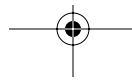
If you are having a problem establishing a network connection using TCP/IP, check this section and try the suggestions listed.

Displaying expanded Service Connection Progress messages

It's helpful to identify at what point in the login procedure the connection fails. An easy way to do this is to display the expanded Service Connection Progress messages. Expanded Service Connection Progress messages describe the current stage of the login procedure. Press the lower half of the Scroll button at any point during login to display these messages.

Viewing the Network Log

If viewing the expanded Service Connection Progress messages does not give you enough information to find out why you cannot connect to your ISP or dial-in server, take a look at the Network Log. The Network Log lists all of the communication that occurs between your modem and your dial-in server during the login procedure. The information in the Network Log can



help your ISP or your System Administrator pinpoint where the login procedure communication fails and why.

To view the Network Log:

- 1 From the Network Preferences screen, tap View Log from the Options menu to display the Network Log screen.
- 2 Tap the up and down arrows of the scroll bar to see the entire Network Log.
- 3 After you finish, tap Done to return to the Network Preferences screen.

Adding a DNS Number

If your ISP or dial-in server requires a DNS number and you did not enter that information in the Network Preferences screen, it will appear that you successfully logged into your network. However, when you try to use an application or look up information, the connection fails. If this occurs, try adding a DNS number. Ask your ISP or your System Administrator for the correct Primary and Secondary DNS IP numbers.

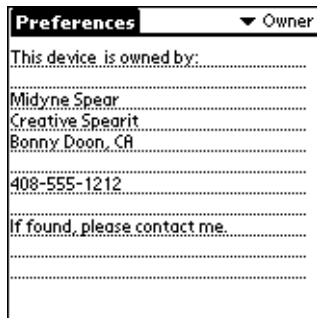
Owner Preferences

Use the Owner Preferences screen to record a name, company name, phone number or other information you want to associate with pdQ smartphone.

If you use the Security application to turn off and lock pdQ smartphone with a password, information that you put in the Owner Preferences displays the next time you turn on pdQ smartphone. See "Security" for more information.

To enter the Owner Preferences:

- ▶ Enter the text you want to associate with pdQ smartphone in the Owner Preferences screen. If you enter more text than will fit on one screen, a scroll bar automatically appears on the right side of the screen.



If you assign a Password (with the Security application), the information in

ShortCuts Preferences

the Owner Preferences screen “locks” and cannot be changed. In this case, an Unlock button appears at the bottom of the screen.

To unlock the Owner Preferences screen:

- 1 Tap Unlock in the Owner Preferences screen to open the Unlock Message dialog.
- 2 Enter the password that you defined in the Security application, and tap OK.

ShortCuts Preferences

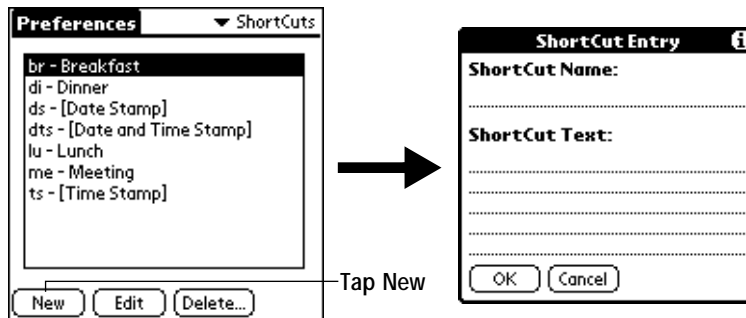
The ShortCuts Preferences screen enables you to define abbreviations for entering text with Graffiti. This section describes how to create, edit and delete a ShortCut. For details on the use of ShortCuts, see the “Graffiti ShortCuts” section in “Writing With the Stylus” in the *pdQ Basics Handbook*.

Creating a ShortCut

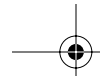
You can create a ShortCut for any words, letters or numbers. All ShortCuts you create appear on the list in the ShortCut Preferences screen. All the ShortCuts are available in any of pdQ smartphone applications and are backed up on your computer when you perform a HotSync operation.

To create a ShortCut:

- 1 Tap New in the ShortCut Preferences screen to open the ShortCut Entry dialog.



- 2 On the ShortCut name line, enter the letters you want to use to activate the ShortCut.
- 3 Tap the ShortCut Text area and enter the text that you want to appear when you write the ShortCut characters.
- 4 Tap OK to close the ShortCut Entry dialog and define your ShortCut.



ShortCuts Preferences



To use a ShortCut, draw the ShortCut stroke followed by the ShortCut characters. The ShortCut symbol appears at the insertion point and indicates you are in ShortCut mode.

Editing a ShortCut

After you create a ShortCut, you can modify it at any time.

To edit a ShortCut:

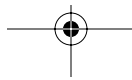
- 1 Tap the ShortCut you want to edit in the ShortCuts Preferences screen.
- 2 Tap Edit to display the ShortCut Name and ShortCut text in the ShortCut Entry dialog.
- 3 Make the changes you want and tap OK.

Deleting a ShortCut

If you no longer need a ShortCut, you can delete it from the list of ShortCuts.

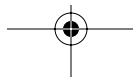
To delete a ShortCut:

- 1 Tap the ShortCut you want to delete in the ShortCuts Preferences screen.
- 2 Tap Delete to display an alert dialog.
- 3 Tap Yes to confirm that you want to delete your ShortCut.






ShortCuts Preferences



Chapter 14



Security

 Your pdQ™ smartphone comes with a Security application so that unauthorized users cannot view the entries you wish to protect. Use Phone Preferences to define security for the pdQ smartphone.

With the Security application you can:

- Hide record entries you mark as “Private.” You can hide private entries with or without a password. Without a password, private entries are hidden until you set the Security application to show them. With a password, you must enter the password to view the private entries.
- Turn off and lock pdQ smartphone so that it does not operate until you enter the correct password.

To open the Security application:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Security screen.



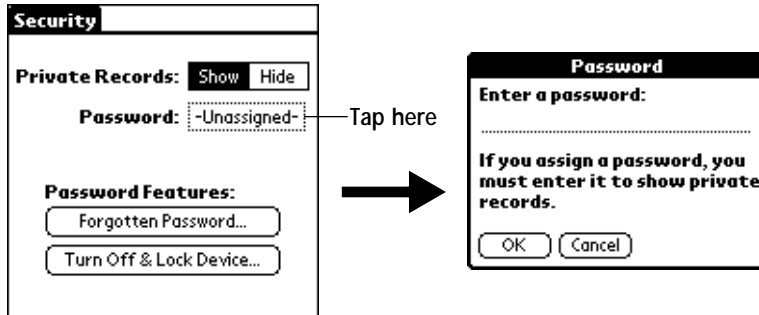
To assign a password:

You can assign a password to protect your private entries and to lock pdQ smartphone.

- 1 Tap the Password box in the Security screen to open the Password dialog.

Security

Hiding Private Entries



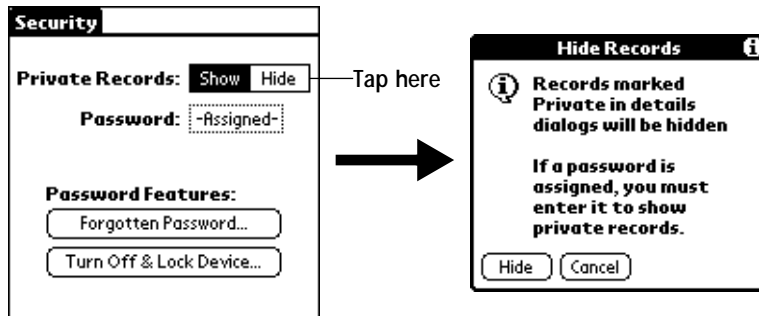
- 2 Enter the password that you want for pdQ smartphone.
- 3 Tap OK to open a confirmation dialog.
- 4 Enter the *same* password a second time, and tap OK to assign that password to pdQ smartphone.

Hiding Private Entries

You can hide the entries that you mark as private. If you assign a password, you must enter it to show entries you mark as private. Note that pdQ smartphone merely hides the entries; it does not delete them.

To hide Private entries:

- 1 Tap the Hide box in the Security screen to open the Hide Records dialog.




- 2 Tap the Hide box to hide entries you mark Private and to close the Hide Records dialog.

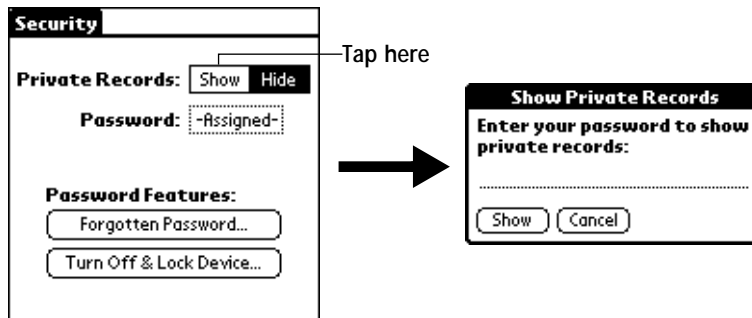
Showing Private Entries

After you hide Private entries, you can use the Security application to display them again.

To show Private entries:

- 1 Tap the Show box in the Security screen.


 If you did not assign a password, your Private entries should be visible. If you did assign a password, the Show Private Records dialog appears.



- 2 Enter your password.
- 3 Tap the Show box to close the Show Private Records dialog and display Private entries in pdQ smartphone applications.

Locking pdQ Smartphone

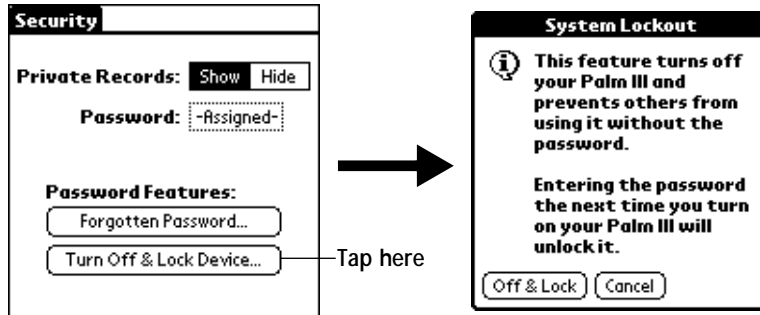
You can also lock pdQ smartphone, so that you need to enter your password to operate it.

 If you lock pdQ smartphone as described in the following procedure, you need to enter the exact password to re-activate pdQ smartphone. If you forget the password, you need to use the reset button to resume using pdQ smartphone. Using the reset button deletes all the entries in pdQ smartphone; however, you can restore all synchronized data at the next HotSync® operation. For information about how to use the reset button, see "Resetting pdQ Smartphone" in the *pdQ Basics Handbook*.

To lock pdQ smartphone with a password:

- 1 Use the HotSync application to synchronize the data between pdQ smartphone and your computer.
- 2 Assign a password as described in "Assigning a Password" earlier in this chapter.
- 3 Tap the Turn Off & Lock Device button in the Security screen to open the System Lockout dialog.

Changing or Deleting a Password



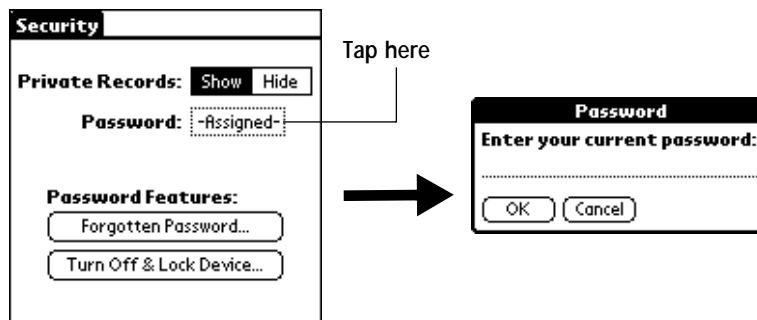
- 4 Tap the Off & Lock button to turn off the power for pdQ smartphone.
- 5 Start pdQ smartphone and enter the password.

Changing or Deleting a Password

Once you define a password for pdQ smartphone, you can change or delete it at any time. You must enter the current password before you can change or delete it.

To change or delete your password:

- 1 Tap the Assigned box in the Security screen to open the Password dialog.



- 2 Enter the current password.
- 3 Tap OK to open a dialog that prompts you for a new password.

Recovering from a Forgotten Password



- 4 To change the password, enter the new password and tap OK. To delete the password, tap Delete.

Recovering from a Forgotten Password

If you forget your password, you can delete the password from pdQ smartphone. Deleting a forgotten password also deletes all entries and files marked as Private.

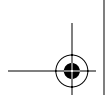


If you synchronize with your computer before deleting a forgotten password, pdQ smartphone restores your private entries the next time you perform a HotSync operation, but it does not restore the password.

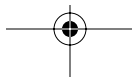
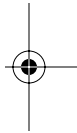
To delete a forgotten password:

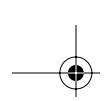
- 1 Tap the Forgotten Password button in the Security screen to open the Delete Password dialog.
- 2 Tap Yes to delete the password, as well as all records and entries marked "Private."

Security



Recovering from a Forgotten Password





Chapter 15

Speed Dialer



The Speed Dialer stores a list of up to 99 phone numbers taken from the Address Book. When you change an entry in the Address Book, pdQ smartphone updates the Speed Dialer list automatically. Before you can use the Speed Dialer list, you need to first enter information in the Address Book and then add it to the Speed Dialer.

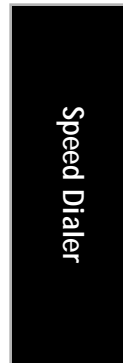
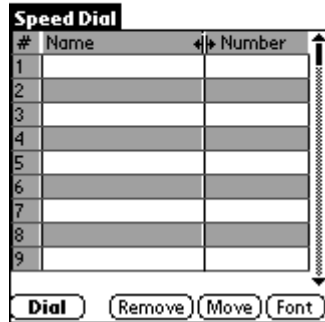
With the Speed Dialer, you can:

- Create a list of frequently called numbers linked directly from the Address Book.
- Access the list using the keypad, Dialer, and Volume Control buttons in addition to the Speed Dialer application.

Using the Speed Dialer

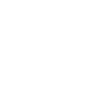
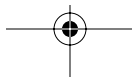
To open the Speed Dialer:

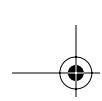
- ▶ Open the keypad, then tap  to open the Speed Dialer.



To add a phone number to the Speed Dialer list:





The Speed Dialer list consists of information linked from the Address Book. Before defining the Speed Dialer list, you need to enter information in the Address Book.








Using the Speed Dialer






- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Address List screen.
- 3 Tap the line that contains the contact information you want to add to the Speed Dialer list, then tap Edit.
- 4 Tap the plus sign (+) that appears to the right of the phone number you want to add to the Speed Dialer list, then tap Done.
- 5 Tap  to open the Applications Launcher.
- 6 Tap  to display the Speed Dialer list and confirm the new Speed Dialer list entry.


To make a call from the Speed Dialer:

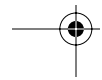
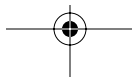
- 1 Open the keypad, then tap  to turn on the phone.
- 2 Tap  to open the Applications Launcher.
- 3 Tap  to display the Speed Dial list.
- 4 Tap the line for the phone number you want to call, then tap Dial.
- 5 Tap End when finished.

To delete a phone number from the Speed Dialer list:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the Address List screen.
- 3 Tap the line that contains the contact information you want to remove from the Speed Dialer list, then tap Edit.
- 4 Tap the minus sign (-) that appears to the right of the phone number you want to remove from the Speed Dialer list, then tap Done.
- 5 Tap  to open the Applications Launcher.


To adjust the width of columns in the Speed Dialer list:

- ▶ Tap and drag  at the top of the columns to adjust column width.



Chapter 16



To Do List

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

With the To Do List, you can:

- Make a quick and convenient list of things to do.
- Assign a priority level to each task.
- Assign a due date for any or all of your To Do items.
- Assign a category for any, or all of your To Do items. You can then view your To Do List based on category (such as Business or Personal).
- Sort To Do items either by due date, priority level or category.
- Attach notes to individual To Do items for a description or clarification of the task.

To open the To Do List:

- 1 Open the keypad, then tap  to open the Applications Launcher.
- 2 Tap  to display the To Do List screen.



To Do List

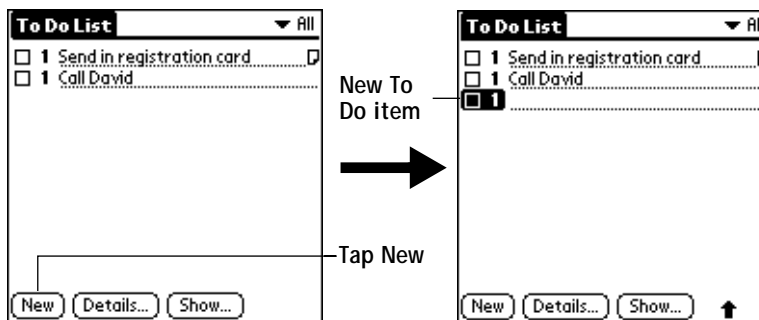
Working With To Do Items

Working With To Do Items


A To Do item is a reminder of some task that you have to complete. pdQ smartphone gives you control over the appearance, level of detail and the sort order of To Do items.

To create a To Do item:

- 1 Tap New in the To Do List screen to add an item to the list.




- 2 Enter the text you want to appear in the To Do item. The text can be longer than one line.
- 3 Tap anywhere on the screen to de-select the To Do item.

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

Setting Priority

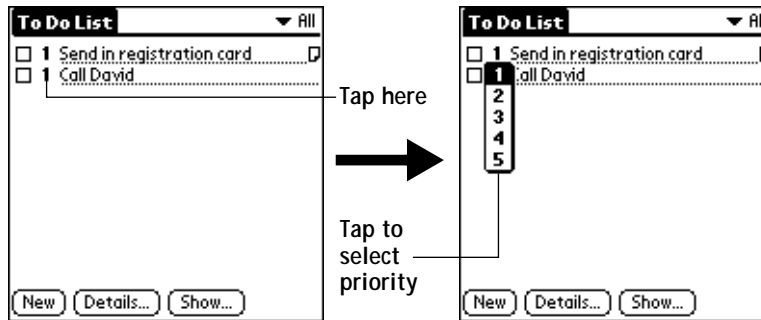
Priority settings for To Do items enable you to arrange the tasks in your To Do List according to relative levels of importance. The default setting for the To Do List is to arrange To Do items by priority and due date, with priority 1 items at the top. If you have a number of To Do items in your list, changing an item's priority setting may move its position in the list.

 When you create a new To Do item, its Priority is automatically set to level "1," the highest (most important) level. However, if you select a To Do item first, the new item appears beneath the selected item with the same priority as the selected item.


Using the Priority feature is optional.

To set a Priority level for a To Do item:

- 1 Tap the Priority number on the left side of the To Do item to open the Priority pick list.



- 2 Tap the Priority number that you want to set for the To Do item (1 is most important and 5 is least important).

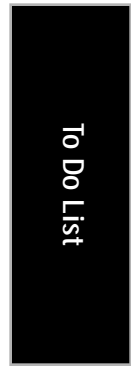
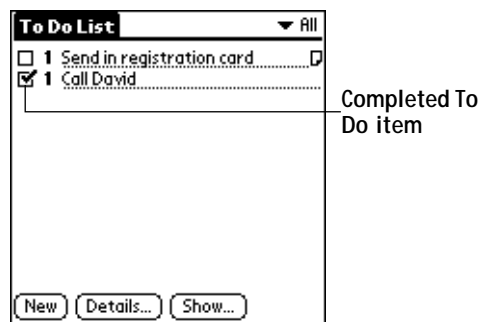
 You can also change the Priority setting for a To Do item with the To Do Details dialog described later in this chapter.

Checking Off a To Do Item

The To Do List makes it easy to mark tasks as you complete them. You can set the To Do List to record the date that you complete the To Do item and you can choose to show or hide complete To Do items. See “To Do Show Options” later in this chapter.

To check off a To Do item:

- ▶ Tap the check box on the left side of the To Do item.



To Do Item Details

To Do Item Details

The To Do Item Details dialog enables you to change individual To Do item settings.

To activate the To Do Item Details dialog:

- 1 Tap anywhere on the text of a To Do item in the To Do List screen.
- 2 Tap Details to open the To Do Item Details dialog.



The following sections describe the features and settings that are available in the To Do Item Details dialog.

Choosing a To Do Category

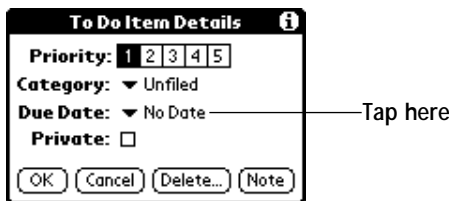
Categories can help you file individual To Do items into groups for easy review. You can assign and edit categories by using the Categories pick list in the Details dialog (see "Using Categories" in the *pdQ Basics Handbook*).

Setting a Due Date

You can associate a due date with any To Do List item. You can also sort the items that appear in the list based on their due date.

To set a Due Date for a To Do List Item:


- 1 Tap "No Date" in the Details dialog to open the Due Date pick list.



- 2 Tap the Due Date that you want to assign the To Do item. The following choices are available:

- | | |
|-----------------|---------------------------|
| Today | Assigns the current date. |
| Tomorrow | Assigns tomorrow's date. |

- One week later** Assigns the date exactly one week from the current date.
 - No Date** Removes the due date from the To Do item.
 - Choose date** Opens the Due Date dialog where you can chose any due date that you want for the To Do item.
- 3 Tap OK to confirm your selection and close the To Do Details dialog.

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

Deleting a To Do Item

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

To delete a To Do item with the To Do Details dialog:

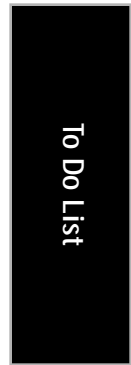
- 1 Tap anywhere in the text area of the To Do item that you want to delete.
- 2 Tap Details to open the To Do Item Details dialog.
- 3 Tap Delete to open the Delete To Do alert dialog.
- 4 Tap OK to confirm that you want to delete the To Do item.

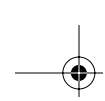
To Do Show Options

The Show Options dialog enables you to control the appearance of the To Do List application.

To change the Show Options settings:

- 1 Tap Show in the To Do List screen to open the To Do Preferences dialog.





To Do List Menu Commands

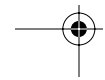
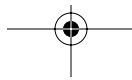
2 Select any of the following settings:

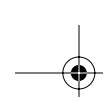
- | | |
|-------------------------------|---|
| Sort by | Enables you to sort the To Do items in one of the following ways: <ul style="list-style-type: none">■ Priority, Due Date■ Due Date, Priority■ Category, Priority■ Category, Due Date |
| Show Completed Items | Displays your complete To Do items in the To Do List. If you turn off this setting, your To Do items disappear from the list when you complete (check) them. |
| Show Only Due Items | Shows only the To Do items that are currently due, past due or have no due date specified in the To Do List. When this setting is active, To Do items that are not yet due do not appear in the list until their due date. |
| Record Completion Date | Replaces the due date with the completion date when you complete (check) the item. If you do not assign a due date to an item, the completion date still records when you complete the item. |
| Show Due Dates | Displays the due dates associated with To Do items in the To Do List screen, and displays an exclamation mark next to incomplete To Do items after the due date passes. |
| Show Priorities | Shows the priority numbers for the To Do items in the To Do List screen. |
| Show Categories | Shows the category for each To Do item on the far right of the To Do List screen. |

3 Tap OK to confirm your selections and close the dialog.

To Do List Menu Commands

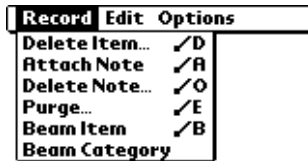
The To Do List includes menu commands to perform common file and editing tasks. See "Using Menus" in the *pdQ Basics Handbook* for information about menu commands common to all pdQ smartphone applications.





Record Menu

When you select the Record menu, its commands appear on screen.



Options Menu

Delete Item

Opens an alert dialog, prompting you to confirm that you want to delete the current To Do item. You must select a To Do item before you can delete it. Tap OK to delete the To Do item from pdQ smartphone, or tap Cancel to close the alert dialog and keep the To Do item.

By default pdQ smartphone removes the item from the To Do list, but retains a copy of the item and transfers it to an archive file on your computer the next time you perform a HotSync® operation. To remove the event completely, clear the Save archive copy on PC check box.

Attach Note

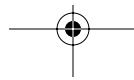
Opens the To Do Note dialog where you can create a note for the current To Do item.

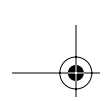
Delete Note

Opens an alert dialog, prompting you to confirm that you really want to delete the note attached to the To Do item. You must select a To Do item before you can delete its note. Tap Yes to delete the Note from the memory of pdQ smartphone, or tap No to close the alert dialog and return to the To Do List.

Purge

Deletes To Do items that you mark (check) as complete. All complete To Do List items remain in the To Do List until you use this command. The default setting is "Save archive copy on PC." This removes complete To Do items from the To Do List, but retains copies and transfers them to an archive file on your computer the next time you perform a HotSync operation.





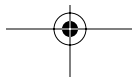
To Do List Menu Commands

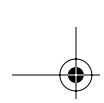
- Beam Item** Beams the current To Do item to another pdQ smartphone through the IR port.
- Beam Category** Beams all To Do Items in the current category to another pdQ smartphone through the IR port.

When you select the Options menu, its commands appears on screen.



- Font** Displays the Select Font dialog where you can choose a different font (text) style for your Address Book entries. See "Choosing Fonts" in the *pdQ Basics Handbook* for details.
- Phone Lookup** Activates the Phone Lookup feature, which is described in "Using Phone Lookup" in the *pdQ Basics Handbook*.
- About To Do List** Shows version (revision) information for the To Do List application.





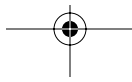
Expense Templates

Appendix A Expense Templates

This appendix provides illustrations of the four expense templates that come with the Palm™ Desktop software. You may use or modify any of these templates when creating expense reports with data from the Expense application.

Sample 1

Travel Expense Reimbursement Claim Form						
4	Employer Name:				Class:	
5					Office Use Only:	
6	Date Submitted:	9/25/98	Project:			
7					Audited:	
8					Approved:	
9					Processed:	
10	Mile/Km Rate:	0.28				
11		Currency	Exchange	US Dollar	Expense	
12		Date	Amount	Rate	Amount	Type
13						Note: Description of Expense Claim
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
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54						



Sample 2

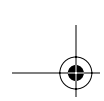
The screenshot displays a spreadsheet application window titled "Sample2.xls". The spreadsheet contains a "Travel Expense Report" form. The form is structured as follows:

- Header (Rows 1-3):** "Travel Expense Report" with fields for "Report name", "Report number", "Report date", and "IC".
- Form Fields (Rows 4-10):** "Travel" (IC), "Date", "Bill to", and "TOTAL" (TOTAL).
- LODGING (Rows 11-15):** "Lodging & Hotel", "Laundry", "Tip", "Lodging total".
- MEALS (Rows 16-21):** "Breakfast", "Lunch & Snacks", "Dinner", "Meals total".
- BUSINESS (Rows 22-27):** "Business meals", "Conference", "Entertainment", "Business total".
- TRANSPORTATION (Rows 28-37):** "Airfare", "Auto Rental", "Auto Miles/Gas", "Local Transportation", "Tolls/Parking", "Mileage (###) /miles", "Travel total".
- MISCELLANEOUS (Rows 38-47):** "Gifts", "Telephone & Fax", "Supplies", "Postage", "Others", "Misc. total".
- TOTAL (Row 48):** "TOTAL" with a corresponding "TOTAL" column.
- Summary (Rows 49-55):** "Less cash advance", "Due employee", "Due company".
- Footer (Rows 56-63):** Fields for "Name", "Exp", "IC", "Report number", "IC".

Sample 3

Expense Templates

Expense Report															
												Date		Year	
1	2	3	4	5	6	7	8	9	10	11	12	13	14		
15	16	17	18	19	20	21	22	23	24	25	26	27	28		
29	30	31	32	33	34	35	36	37	38	39	40	41	42		
43	44	45	46	47	48	49	50	51	52	53	54	55	56		
57	58	59	60	61	62	63	64	65	66	67	68	69	70		
71	72	73	74	75	76	77	78	79	80	81	82	83	84		
85	86	87	88	89	90	91	92	93	94	95	96	97	98		
99	100	101	102	103	104	105	106	107	108	109	110	111	112		
113	114	115	116	117	118	119	120	121	122	123	124	125	126		
127	128	129	130	131	132	133	134	135	136	137	138	139	140		
141	142	143	144	145	146	147	148	149	150	151	152	153	154		
155	156	157	158	159	160	161	162	163	164	165	166	167	168		
169	170	171	172	173	174	175	176	177	178	179	180	181	182		
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449	450	451	452	453	454	455	456	457	458	459	460	461	462		
463	464	465	466	467	468	469	470	471	472	473	474	475	476		
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771	772	773	774	775	776	777	778	779	780	781	782	783	784		
785	786	787	788	789	790	791	792	793	794	795	796	797	798		
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911	912	913	914	915	916	917	918	919	920	921	922	923	924		
925	926	927	928	929	930	931	932	933	934	935	936	937	938		
939	940	941	942	943	944	945	946	947	948	949	950	951	952		
953	954	955	956	957	958	959	960	961	962	963	964	965	966		
967	968	969	970	971	972	973	974	975	976	977	978	979	980		
981	982	983	984	985	986	987	988	989	990	991	992	993	994		
995	996	997	998	999	1000	1001	1002	1003	1004	1005	1006	1007	1008		
1009	1010	1011	1012	1013	1014	1015	1016	1017	1018	1019	1020	1021	1022		
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1037	1038	1039	1040	1041	1042	1043	1044	1045	1046	1047	1048	1049	1050		
1051	1052	1053	1054	1055	1056	1057	1058	1059	1060	1061	1062	1063	1064		
1065	1066	1067	1068	1069	1070	1071	1072	1073	1074	1075	1076	1077	1078		
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1177	1178	1179	1180	1181	1182	1183	1184	1185	1186	1187	1188	1189	1190		
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1261	1262	1263	1264	1265	1266	1267	1268	1269	1270	1271	1272	1273	1274		
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1303	1304	1305	1306	1307	1308	1309	1310	1311	1312	1313	1314	1315	1316		
1317	1318	1319	1320	1321	1322	1323	1324	1325	1326	1327	1328	1329	1330		
1331	1332	1333	1334	1335	1336	1337	1338	1339	1340	1341	1342	1343	1344		
1345	1346	1347	1348	1349	1350	1351	1352	1353	1354	1355	1356	1357	1358		
1359	1360	1361	1362	1363	1364	1365	1366	1367	1368	1369	1370	1371	1372		
1373	1374	1375	1376	1377	1378	1379	1380	1381	1382	1383	1384	1385	1386		
1387	1388	1389	1390	1391	1392	1393	1394	1395	1396	1397	1398	1399	1400		
1401	1402	1403	1404	1405	1406	1407	1408	1409	1410	1411	1412	1413	1414		
1415															



Appendix B

Creating a Custom Expense Report

This section explains how to modify existing Expense application templates, and how to create your own custom expense report templates for use with the Expense application.

This section assumes that you are familiar with Microsoft Excel or a similar spreadsheet application. If you are not familiar with Microsoft Excel, consult your company's Information Services department or another experienced user.

About Mapping Tables

Before creating or modifying an Expense template, it's important to understand the function of Palm™ Desktop's Expense application. In simple terms, the Expense application is designed to move Expense data from your pdQ smartphone into a Microsoft Excel spreadsheet.

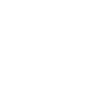
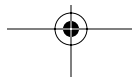
Each Expense item stored in pdQ smartphone represents a group of related data. The following data can be associated with an expense item:

- Category
- Date
- Expense Type
- Amount
- Payment Method
- Payment Currency
- Vendor
- City
- Attendees
- Note

When you perform a HotSync® operation between pdQ smartphone and the Palm Desktop on your computer, the Expense data is stored on your computer (in a file named Expense.txt). When you open the Expense application in Palm Desktop, an Excel macro starts, and populates an expense template with your data based on the rules specified in a spreadsheet file named Maptable.xls.

The Maptable.xls file is an editable spreadsheet that functions as a "mapping table." The function of the mapping table is to guide the Excel macro in extracting the Expense data. The mapping table tells the Excel macro how large the spreadsheet is and provides the data-cell layout of the Excel template used for the Expense Report.

Creating a Custom Expense Report



Customizing Existing Sample Templates

Customizing Existing Sample Templates

Four sample Expense Report templates come with Palm Desktop. These templates are stored in the Templates folder (which is in the same folder as the Palm Desktop application).

If the layout of one (or more) of these templates is appropriate for your reporting needs, you can easily customize the templates with your company name and other information.

To customize a sample Expense Report template:

- 1 Make a backup copy of the contents of the Templates folder.



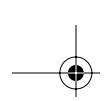
- 2 Double-click the name of the sample template you want to modify to open it in Microsoft Excel.
- 3 Make any changes that you want to the names (or other information) in the sample template.

Do not insert rows or columns in the sample template. Doing so changes the way your Expense data maps to the template and causes errors. If you want to move the cells to a different location or add or delete rows or columns, you will have to make changes to the Mappable.xls file.

You can insert your own company logo without changing the Mappable.xls file. However, if you change the file name, you need to make a corresponding change in the Mappable.xls file.

You can also rename cells without changing the Mappable.xls file — provided that the expense type corresponds to pdQ smartphone data. For example, you can change “Snack” to “Munchies” — and then all items entered on pdQ smartphone as “Snack” will map to the cell(s) labeled “Munchies.”

- 4 Choose Save As from the File menu to open the Save As dialog.
- 5 Click Save as type drop-down list and choose Template (*.xlt).



Determining the Layout of the Expense Report

6 Navigate to the Templates folder (in the Palm Desktop directory).

If you *do not* need to change the Matable.xls file, save the template file with its *original file name* (e.g., Sample2.xlt).

If you *do* need to change the Matable.xls file, give your modified template a unique name. Be sure to use the .xlt file suffix, which defines the file as a Microsoft Excel template.

7 Click Save to save your modified template and make it available for future use.

If you need to modify the Matable.xls file, you must do this before you can use the modified template with your Expense data. To modify the Matable.xls file for your new template, see "Programming the Mapping Table" later in this appendix. *Read all of the sections of this appendix before making changes to the Matable.xls file.*

Determining the Layout of the Expense Report

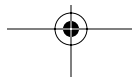
This section describes the layout considerations for the Expense Report and explains the terms used for creating the report.

Labels

There are two kinds of labels that you need to define for your report: day/date and expense type. Each kind of label can be either Fixed or Variable. A Fixed label means that the label *always* appears as a header at the beginning of a row or column. If a label is not Fixed, it is variable.

For example, a list table of expenses could have variable labels in the rows for day/date, and variable labels in the columns for expense type. In this case, neither day/date—or expense type information would be "fixed" (as a header). Instead, the date and expense type information would be filled into the cells of the spreadsheet as appropriate.

Examples of both Fixed and Variable labels appear in the sample expense templates.



Analyzing Your Custom Expense Report

Sections

A Section is an area of the report that has common formatting. It is common for an Expense report to have more than one Section. For example, the following sample Expense Report named Sample3.xls contains several Sections.

1	2	3	4	5	6	7	8	9	10
					Region	Site #	Dept.	Project	
Expense Report									
5	ITINERARY		DATE						
6			QTY						
7									
9			Employee paid						
10	M	Breakfast	Company paid						
11	E		Employee paid						
12	A	Lunch & Snack	Company paid						
13	L		Employee paid						
14	D	Dinner	Company paid						
15			Employee paid						
16		Business meals & entertainment	Company paid						
17			Employee paid						
18		Conference	Company paid						
19	M		Employee paid						
20	I	Postage	Company paid						
21	D		Employee paid						
22	C	Parking & Tolls	Company paid						
23			Employee paid						
24		Gifts, Tips, Suppl	Company paid						
25		Incidentals, Other	Employee paid						
27	BUSINESS MEALS AND ENTERTAINMENT EXPENDITURES								
28									
29	Date	Expense Type	Amount	Vendor	Car				
30									
31									
32									

Because your Expense data maps to row and column areas of your final report, different Sections require different definitions for the data mapping. To create additional Sections with different mapping, you create corresponding additional lines to the mapping table file named Maptable.xls. This procedure is explained later in this appendix.

If a section contains cells for prepaid (company paid) expenses, you need to create an additional line in the mapping table for "prepaid." This will count as an additional section in the mapping table. The only data that differs in the prepaid section (from the non-prepaid section) is the row/column numbers for the expense type.

Analyzing Your Custom Expense Report

If you already have a custom Excel expense report, you can use it with a modified mapping table. However, before you can create a Maptable.xls file that corresponds to your custom Expense Report, you must first analyze the characteristics of your report.

Perform the following before you begin a custom mapping table:

- Print a copy of your custom expense report. Activate the Row and Column Headings option in the Sheet settings of the Page Setup command. This enables you to quickly determine the size of the Section(s), as well as the numbers for the start rows and columns.
- On the printed copy, identify the data Sections. A Section is an area of data with common row and column formatting. A yellow highlighter marking pen can make it easy to see the Sections as you work with programming the mapping table. Your custom Expense Report can contain any number of Sections, and the same data can be repeated in any Section.
- On the printed copy, identify the type of Labels that apply to each Section. Each Section can have only one kind of Fixed or Variable Label for rows. Likewise, each Section can have only one kind of Fixed or Variable Label for columns.
- Place a copy of your custom Expense Report in the Templates folder (in the Palm Desktop directory). Change the file name so it has the file extension .xlt (which defines it as a Microsoft Excel Template). Make a note of the exact file name so it can be defined in the mapping table file.

Programming the Mapping Table

Once you have analyzed the components of your custom Expense Report, you can program the mapping table to fill the report with data from pdQ smartphone.

To program a new custom mapping table:

- 1 Open a copy of the Maptable.xls file in Microsoft Excel.

This file is located in the same folder as the Palm Desktop application. *Make a backup copy of this file before you make your modifications.*
- 2 **Mapping a new template.** Scroll to where you find the name of the original template that you chose for your modifications. The name of the template will appear in column B of the Maptable.xls file, next to the cell highlighted in green that reads "Template Name:". If you did not modify an existing template, move to any table in the Maptable.xls file.
- 3 Select all the *rows* associated with the template name. To select the rows, click and drag on the row numbers (left side), so they appear highlighted.

Programming the Mapping Table

	1	2	3	4	5
5	Template Name:	SAMPLE1.XLT			
6		ROW			
7		Fixed Label		Variable Label by	
8		Day/Date	Expense Type	Day/Date	Expense Type
9	Section1			X	
10					
11					
12					
13	Template Name:	SAMPLE2.XLT			
14		ROW			
15		Fixed Label		Variable Label by	
16		Day/Date	Expense Type	Day/Date	Expense Type
17	Main		X		
18	Business&Entertainment			X	
19					
20					
21					
22	Template Name:	SAMPLE3.XLT			
23		ROW			
24		Fixed Label		Variable Label by	
25		Day/Date	Expense Type	Day/Date	Expense Type
26	Main (PREPAID)		X		
27	Main		X		

All rows associated with template are selected

- 4 Choose Copy from the Edit menu.
- 5 Scroll down to a blank area of the Maptable.xls file (below the rows used for Sample4.xlt), and click on a row number to select a blank row.
- 6 Choose Paste from the Edit menu. A copy of the rows you selected in step 3 is pasted into the Maptable.xls file.
- 7 **Name the table.** In the cell immediately to the right of the cell entitled Template Name, enter the *exact* file name of your custom Expense Report template.
- 8 **Define the number of Sections.** Each row in a table defines how pdQ smartphone data will be placed in a Section of your custom Expense Report. Note that the prepaid portion of a section has its own row and counts as a separate section for map table purposes, *even though it is not a separate section in your template.*

22	Template Name:	SAMPLE3.XLT	
23		ROW	
24		Fixed Label	
25		Day/Date	Expense Type
26	Main (PREPAID)		X
27	Main		X
28	Business Meals & Entertainment		
29	Mileage Log		

Table with four sections

Programming the Mapping Table

You may add or delete rows as necessary so that the total number of rows corresponds to the number of Sections in your custom Expense Report. To clear all of the existing settings in a row, click to select the row and press Ctrl+Delete. Name each row to correspond to a Section of your custom Expense Report.

- 9 **Determine the Label settings.** The orientation of the data fields (Row, Column) appears in the yellow section of the table.

MAPPING TABLE							
ROW				COLUMN			
Fixed Label	Variable Label by	Fixed Label	Variable Label by	Fixed Label	Variable Label by	Fixed Label	Variable Label by
DayDate	Expense Type	DayDate	Expense Type	DayDate	Expense Type	DayDate	Expense Type
		x					x

Determine whether the **Rows** will contain expense or date information, and place an "x" in the appropriate cell. When you do this, you also define whether the label is Fixed or Variable. You can place only one "x" in the Row section (columns 2–5).

Determine whether the **Columns** will contain expense or date information, and place an "x" in the appropriate cell. When you do this, you also define whether the label is Fixed or Variable. You can place only one "x" in the Column section (columns 6–9).

- 10 **Define the dimensions of the Section.** The dimensions of the Section appear in the green columns (10–13).

# of Rows	# of Columns	Start Row	Start Column
30		12	1

of Rows Represents the total number of rows in the Section, excluding any header or total rows. In other words, this includes only the number of rows in the Section where pdQ smartphone data will be placed.

of Columns Represents the total number of columns in the Section, excluding any header or total columns. In other words, this includes only the number of columns in the Section where pdQ smartphone data will be placed.

Start Row Is the number of the first row of the Section that will be filled with pdQ smartphone data.

Start Column Is the number of the first column of the Section that will be filled with pdQ smartphone data.

Creating a Custom Expense Report

Programming the Mapping Table

11 Define the Dates and Intervals. The dates and intervals between dates appears in the light blue columns (14–17).

Date	Intervals		
	Between		
Date	Dates	Start day	Day
1	0		

In the **Date** cell, enter the row or column number where all the date information will be placed.

In the **Dates** cell, enter the number of blank columns (or rows) separating the date fields. If there are no blank columns (or rows) between date entries, leave this number set to zero.

In the **Start Day** cell, enter the day of the week that starts the expense reporting period. Enter a three-character abbreviation for the day (e.g., Sun, Mon, Tue).

In the **Day** cell, enter the row or column number where all the day information will be placed. If the dates are in a row, enter the row number. If the dates are in a column, enter the column number.

12 Define whether the Section is in list format. This setting appears in the light purple columns (18–19).

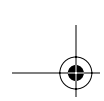
Listing Format	Expense Type
YES	8

If the Section will present the data in a list format, enter the word “yes”. Otherwise, enter the word “no”. The following diagram shows data presented in a list format:

6	Date	Category	Type	Amount	Country	Payment Type
7						
8						
9						
10						
11						

Only if your section is in list format: In the Expense Type cell, enter the number of the row or column where the expense description will be placed. Expense amounts can be entered in several different columns or rows if required by your template. *Expense type labels* must all appear in the same column.

13 Enter the row or column numbers for the expense types that appear in the Section. These settings appear in the aqua columns (20–48).



Programming the Mapping Table



Expense Types						
Snacks	Breakfast	Lunch	Insurance	Meals	Car Rental	Others
4	4	4	4	4	4	4

For these settings, simply enter the row or column number for the expense types that you want to appear in the Section. Note that the same row or column number can be used more than once. An example of this would be meals that encompass breakfast, lunch, dinner and snacks. In the previous example, all expense items would be populated into row/column 4 of the custom Expense Report.

- 14 **Complete the table.** All of the remaining columns (49–57) in the table are used to define the column or row number that corresponds to the description.
- 15 **Mark a Section for prepaid expenses (yellow column).** If a row in the map table is for prepaid (company paid) expenses, type a “yes” in the cell on that Section’s row. Type “no” in all the cells of this column that do not pertain to prepaid expenses.

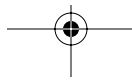
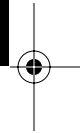
NO
PrePaid
NO
YES
NO

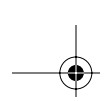
- 16 Repeat steps 9 through 15 for each Section that you have defined for your custom Expense Report.
- 17 **Map Expense Report Options dialog (magenta section).** The Expense Report Options dialog has five fields where you can fill in data for the header on your expense report. Use this section to specify the row and column on your template where this information will be mapped.

Employee Name		Department	
Header 1 Row	Header 1 Col	Header 2 Row	Header 2 Col
2	5	2	5

Because header data is not related to any particular Section, you have to fill in only one row. If the item does not appear on your template, leave these cells blank.

Creating a Custom Expense Report





Using Applications Other Than Microsoft Excel

Using Applications Other Than Microsoft Excel

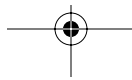
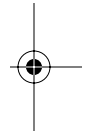
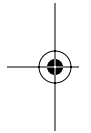
You can use applications other than Microsoft Excel (such as Lotus 1-2-3 or Quattro Pro) to open and manipulate the Expense data on your computer. The data file is named "Expense.txt," and is stored in the Expense folder, within the folder containing pdQ smartphone user data.

Expense data in the Expense.txt file is in tab-delimited format.

Expense File Details

The Expense.txt file contains four groups of data. It will be easier to see these four distinct groups of data if you open the file with a spreadsheet application.

Trips	Shows the number of Expense application categories, and lists each one followed by an "end" statement.
Currency	Shows how many currencies were used for the Expense data, and lists the countries that correspond to that currency.
Trip	Shows the number of expenses by category, and lists the expenses for each category.
Expenses	Shows the total number of expenses, and lists them chronologically.





Appendix C

Non-ASCII Characters for Login Scripts

The following information enables you to create custom login scripts that require non-ASCII characters. It is provided for advanced users who understand the use and requirements of such characters in a custom login script.

Use of ^char

You may use the caret (^) to transmit ASCII command characters. If you send ^*char*, and the ASCII value of *char* is between @ and _, then the character is automatically translated to a single-byte value between 0 and 31. For example, ^M is converted to a carriage return. If *char* is a value between a and z, then the character sequence is translated to a single-byte value between 1 and 26. If *char* is any other value, then the character sequence is not subject to any special processing.

For example, the string "Joe^M" transmits Joe, followed by a carriage return.

Carriage Return and Line Feed

You may include carriage return and line feed commands as part of the login script, when entered in the following format:

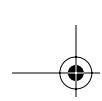
<cr>Sends or receives a carriage return

<lf>Sends or receives a line feed

For example, the string "waitfor Joe<cr><lf>" waits to receive Joe followed by a carriage return and line feed from the remote computer before executing the next command in the script.

Non-ASCII Characters
for Login Scripts





Literal Characters

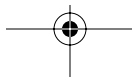


Literal Characters

The backslash (\) character defines that the *next character* is transmitted as a literal character, and is not subject to any special processing ordinarily associated with that character.

Examples:

- \^ Includes a caret as part of the string
- \< Includes a < as part of the string
- \\ Includes a backslash as part of the string

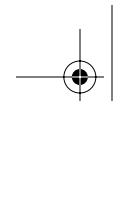


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A

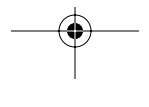
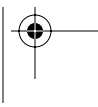
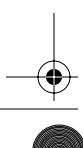
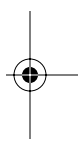
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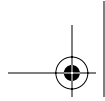


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