

Intellisync Mobile Suite

Client User's Guide

Palm OS Platform



Intellisync Corporation
200 North Point Center East, Suite 600
Alpharetta, GA 30022
(770) 754-5600
www.intellisync.com

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Intellisync Corporation
200 North Point Center East, Suite 600
Alpharetta, GA 30022

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Intellisync Corporation
Documentation Department
200 North Point Center East, Suite 600
Alpharetta, GA 30022
or
documentation@intellisync.com

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CHAPTER

1

Getting Started

This chapter provides an introduction of how Intellisync Mobile Suite can provide easy access to information. Intellisync Mobile Suite runs on client computers and mobile devices and is the only application you need to stay connected while away from the office.

The sections in this chapter are as follows:

- Understanding synchronization
- Synchronizing using Intellisync Mobile Suite

Understanding synchronization

Synchronization is the process of moving information between your company's server and your mobile device. If your company uses Microsoft Exchange, Lotus Domino, or Novell GroupWise, your device can receive e-mail messages and Personal Information Manager (PIM) information such as calendar entries, appointments, and contacts. Likewise, if you make changes to information on your device, the changes are updated to your company's server when you synchronize.

Depending on how your system administrator has configured your company's server, you may be able to access your e-mail messages and PIM information from most Internet-connected computers without the need to install special software.

Synchronizing using Intellisync Mobile Suite

Intellisync Mobile Suite has an easy-to-use user interface (UI) and serves as your launch pad for delivery and synchronization for information on your device.

Using Intellisync Mobile Suite, you can complete tasks such as the following:

- Send and receive e-mail messages
- Receive or update PIM information
- Review a log of activity for each synchronization
- Change settings and user preferences

Intellisync Mobile Suite offers true synchronization with your company's server. For example, if you delete an e-mail message on your device, you also delete it from your company's server the next time you synchronize.



Setting Up Your Device

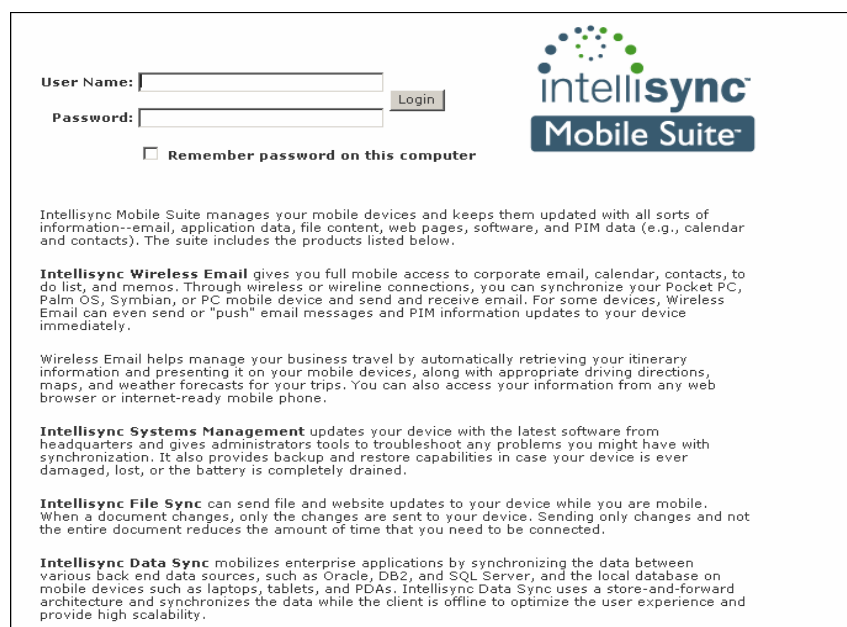
This chapter provides information on how to install Intellisync Mobile Suite on your Symbian UIQ device.

Starting the installation process

Use the following instructions to install Intellisync Mobile Suite on your device. Your system administrator should provide a URL (Internet address) or a location on your company's server to install the software on your device.

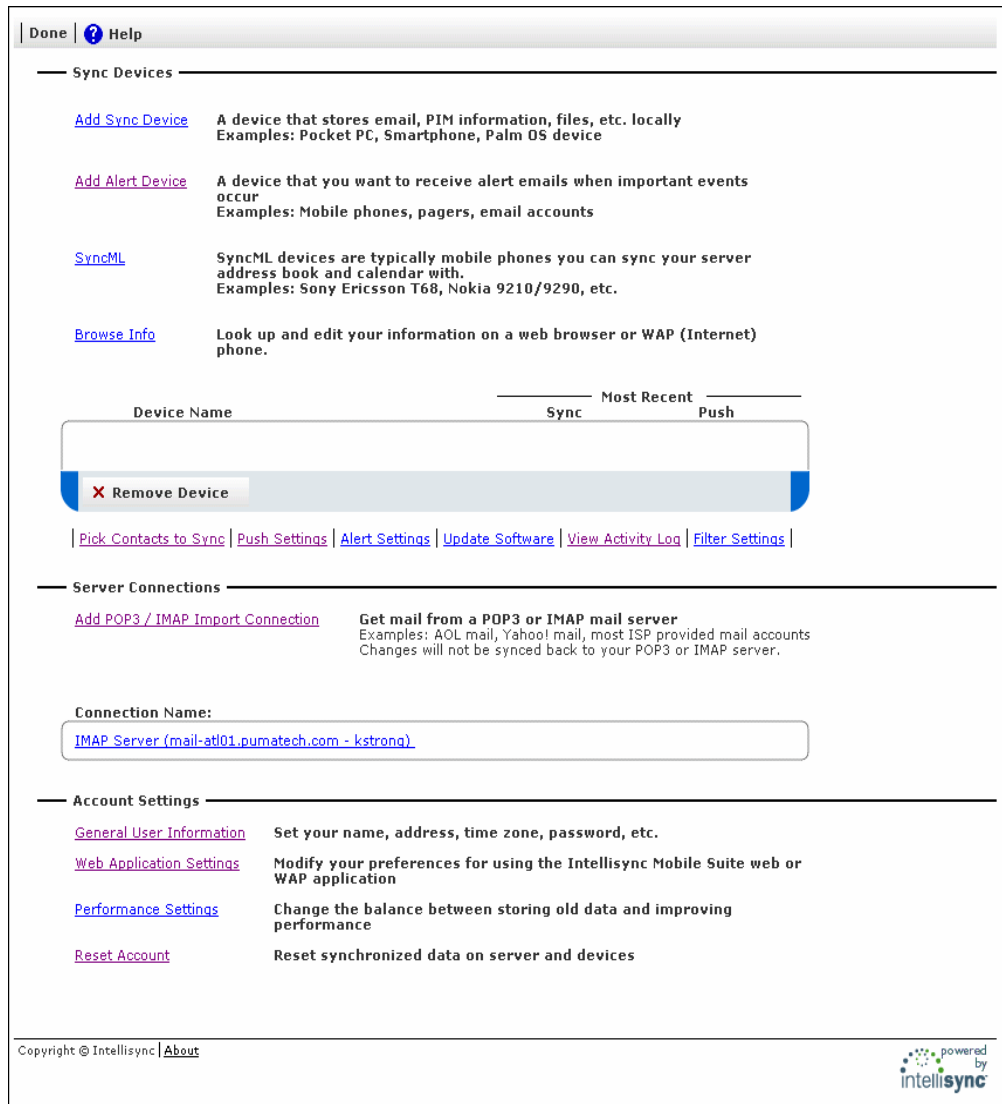
To start the installation process, complete the following steps:

1. Go to the URL provided by your system administrator. The Intellisync Mobile Suite Login page appears.



Login page

2. Enter your user name and password, and then click **Login**.
3. On the left navigation bar, click **Settings**. The Settings page appears.
4. Click **Add Sync Device**.



Settings page

5. Select the Palm OS-Based Mobile Phone option, and then click **Next**.

Next | Cancel | Don't Install Now | Help

When you click "Next" we'll install software on your device.

- Pocket PC**
Pocket PC devices. Examples: HP iPaq, Pocket PC Phones, Samsung i730, Audiovox XV6600
- Palm OS-Based Handheld**
Palm OS-Based Devices running OS 3.5 or higher. Examples: Palm Tungsten, Treo, Samsung
- Symbian OS-Based Mobile Phone**
Palm OS-Based Devices running OS 3.5 or higher. Examples: Palm Tungsten, Treo, Samsung
- Smartphone OS-Based Mobile Phone**
Microsoft Smartphone OS devices. Examples: Motorola MPx220, Samsung i600, Audiovox SMT5600
- BREW-Based Mobile Phone**
Examples: Verizon LG VX7000, LG VX8000, LG VX9800
- Windows PC**
Windows 2000, XP, 2003. Examples: Laptop, Desktop PC, Tablet PC

Trip and Appointment Plus Extensions for Microsoft Outlook
Installs extensions to your Microsoft Outlook application on your PC that help you manage your trips and special appointments. You will see new icons in Outlook and new tabs on these special Outlook appointments.

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Add Sync Device page

6. Select the Carrier and Phone Number option, choose your wireless carrier from the list, enter your phone number, and then click **Send Message**.

Help

Install Software

Would you like to install software on your phone wirelessly?

This is a convenient choice when connecting your phone to your computer is difficult. Note that you may incur charges from your carrier for one SMS notification and the data downloaded. The download could take a few minutes, during which time you will not be able to make or receive phone calls.

Yes, Send instructions to your device.

Enter your phone number and carrier, or email address, and click Submit. You will receive instructions on your phone on how to finish the installation.

- Carrier and Phone Number, or**
- Email Address for your Mobile Phone**

Wireless carrier: [List Carriers](#)

Phone number:

Note: Your phone's email address will usually have your phone number in it. Type this in without parentheses or dashes.

No, Install on PC

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Install Software page

The Install Software page appears with notification that a text message has been sent to your device.

Choosing to install Intellisync Mobile Suite software wirelessly allows you to initiate the installation process over the air (OTA) and eliminate the need for synchronizations with laptops or other computers.

After you initiate the installation process, verify that you received a text message on your device.

Installing Intellisync Mobile Suite on your device

To install Intellisync Mobile Suite software on your device, complete the following steps:

1. Open the text message on your device.
2. Select the link in the text message for the installation file.
3. Select the **Install Software – Palm OS** link. The Download dialog box appears.
4. Select **Yes** for “Do you want to download?” to start the download process.
5. When the download process completes, select **Open** to start the install process. The Transfer dialog box appears.
6. Select **Yes** for “Do you want to accept into Applications folder?” to start the installation. Intellisync Mobile Suite loads the software to your device.

After the installation process completes, you must to initiate your first synchronization session.

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

7. Select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
8. Select the **Sync** icon. A dialog box appears with the initial synchronization session options:

Refresh. This option replaces the data on your device with data from your company’s server.

Merge. This option combines data from your company’s server with the data on your device. Selecting the Merge option may cause duplicate entries.



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

9. Enter your password and Intellisync Mobile Suite will start the synchronization process.

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

10. On the Install Software Web page, click **Next**. The Configure Account screen appears.

Your Palm OS device appears in the Device Name list. Intellisync Mobile Suite is successfully installed on your device.



CHAPTER

3

Synchronizing Your Device

This chapter provides information on how to synchronize and configure your Palm device. The sections in this chapter are as follows:

- Synchronizing your device
- Modifying your synchronization settings

Synchronizing your device

Intellisync Mobile Suite synchronizes your e-mail messages and PIM information on your device with your company's server.

To synchronize your device, complete the following steps:

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



To view the progress of a synchronization session, select the Intellisync icon at the right bottom corner of the screen.

Modifying your synchronization settings

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

Using What to Sync settings

You can modify settings to manage your synchronization sessions. Complete the following steps to navigate to the What to Sync screen:

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

Modifying Mail – Inbox, Sent, and Drafts settings

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

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

Using When to Sync settings

When to Sync settings allows you to select settings for SMS-based Push and ReadySync. To set up these options, follow these steps:

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **When to Sync**. The When to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:

Push. Automatically synchronizes e-mail messages and PIM information.

Timed Interval. Select an interval from the list. This indicates the frequency with which you want synchronization to occur.

Limit sync. Select the daily or weekday setting for synchronization.

Not Before. Enter the time when synchronization will not occur before this time.

Not After. Enter the time when synchronization will not occur after this time.

Minimal battery level. Enter a percentage of battery life at which you want to disable synchronization.

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

Use Network push. Select this check box to automatically initiate a network connection.

Use SMS push. Select this check box to automatically initiate a network connection when the device is powered off.

Allow screen-off during sync. Select this check box to power off during a synchronization session.

▶ If your device loses its network connection when powered off, clear this check box.

5. Select **OK** to return to the When to Sync screen, and then select **OK** to return to the Settings screen.

Guidelines for setting up Push options using your device

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

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

Using notification settings

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

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **When to Sync**. The When to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:
 - Notify when data received.** Select this check box for notification when your device receives new data.
 - Sound.** Select this check box to use sound when your device receives new data.
 - Show Alert.** Select this check box to show an alert when your device receives new data.

Using connection settings

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

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select the **Settings** icon, and then select **When to Sync**. The When to Sync screen appears.

3. Modify the following settings as necessary:
 - User name.** Enter a valid user name to access the server.
 - Server name.** Enter the server address.
 - Connection.** Select to keep connection active or disconnect if not needed.
 - Connection management.** Select the connection type for the server.
 - Detailed Progress Screen.** Select this check box for display detailed information during synchronization.



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

4. Select **Advanced**. The Advanced screen appears. Modify the fields as necessary:
 - Use proxy server.** Select this check box to use a proxy server.
 - Address.** Enter the address of the proxy server.
 - Port.** Enter the port of the proxy server.
 - Bypass for local addresses.** Select this check box to bypass proxy server with a local address.
 - Username.** Enter the username of the local address.
 - Password.** Enter the password of the local address.
 - Enable other sync apps.** Select this check box to use other sync conduits such as Outlook or Palm Desktop.
5. Select **OK** to return to the sync main menu.

Using security settings

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

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



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



CHAPTER

4

Using Sync Mail

This chapter provides information on how to view and manage your e-mail messages using SyncMail.

Using SyncMail



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






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

Displaying your e-mail messages

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

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

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

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

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






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

E-mail Message Option	Function
Get Attachment(s)	Marks the e-mail message to download the full attachment(s) during the next synchronization session. This option displays the Attachment(s) Selected for Download icon next to the e-mail message.

Reading your e-mail messages




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

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

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

Responding to meeting requests

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

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

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

Viewing attachments

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



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

Creating e-mail messages

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


1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. Select the **New E-mail** icon at the bottom of the screen. The New Message screen appears.
3. Enter an e-mail address in the To: field.
 - ▶ You may enter several e-mail addresses by separating them with a semi-colon.
4. Enter text in the optional Subj: field.
5. Enter your message in the e-mail body.
6. Select the **Save** icon. Your e-mail message is sent to the Outbox folder and transmitted during the next synchronization session.

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

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

Creating meeting requests

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

1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. Select the **New Meeting Request** icon. The Create Meeting screen appears.
3. Enter an e-mail address in the To: field.
 You may enter several e-mail addresses by separating them with a semi-colon.
4. Enter the necessary information for the meeting request.
5. Select **OK**. Your meeting request is sent to the Outbox folder and transmitted during the next synchronization session.

Managing e-mail preferences

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

- **General.** These settings affect the general functionality of your e-mail messages.
- **Inbox.** These settings affect the way you manage e-mail messages in the Inbox folder.
- **Outbox.** These settings affect the way you manage e-mail messages in the Outbox folder.
- **Drafts.** These settings affect the way you manage your e-mail messages in the Drafts folder.
- **Sent.** These settings affect the way you manage e-mail messages in the Sent folder.
- **Deleted.** These settings affect the way you manage e-mail messages in the Deleted folder.

Setting general preferences

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

1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. From the **Options** menu, select **Preferences**. The Preferences screen appears.
3. Select the **General** tab.

4. Modify the following fields as necessary:
 - When replying, include body leading text.** Select this check box to enter leading text before the body of each reply e-mail message.
 - Include signature.** Select this check box to enter a custom signature for each e-mail message.
5. Select **OK** to return to the Email screen.

Setting standard e-mail folder preferences

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

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

Using Intellisync Mobile Suite

This chapter provides information on how to use Intellisync Mobile Suite on the Web.

Using Intellisync Mobile Suite on the Web

Intellisync Mobile Suite on the Web allows you to check and send e-mail messages, enter calendar entries, add contacts, and create notes. Intellisync Mobile Suite on the Web also allows you to add and manage your sync devices.


To access Intellisync Mobile Suite on the Web, complete the following steps:

1. Go to the URL provided by your system administrator. The Intellisync Mobile Suite Login page appears.

User Name:

Password:

Remember password on this computer



Login

Intellisync Mobile Suite manages your mobile devices and keeps them updated with all sorts of information—email, application data, file content, web pages, software, and PIM data (e.g., calendar and contacts). The suite includes the products listed below.

Intellisync Wireless Email gives you full mobile access to corporate email, calendar, contacts, to do list, and memos. Through wireless or wireline connections, you can synchronize your Pocket PC, Palm OS, Symbian, or PC mobile device and send and receive email. For some devices, Wireless Email can even send or "push" email messages and PIM information updates to your device immediately.

Wireless Email helps manage your business travel by automatically retrieving your itinerary information and presenting it on your mobile devices, along with appropriate driving directions, maps, and weather forecasts for your trips. You can also access your information from any web browser or internet-ready mobile phone.

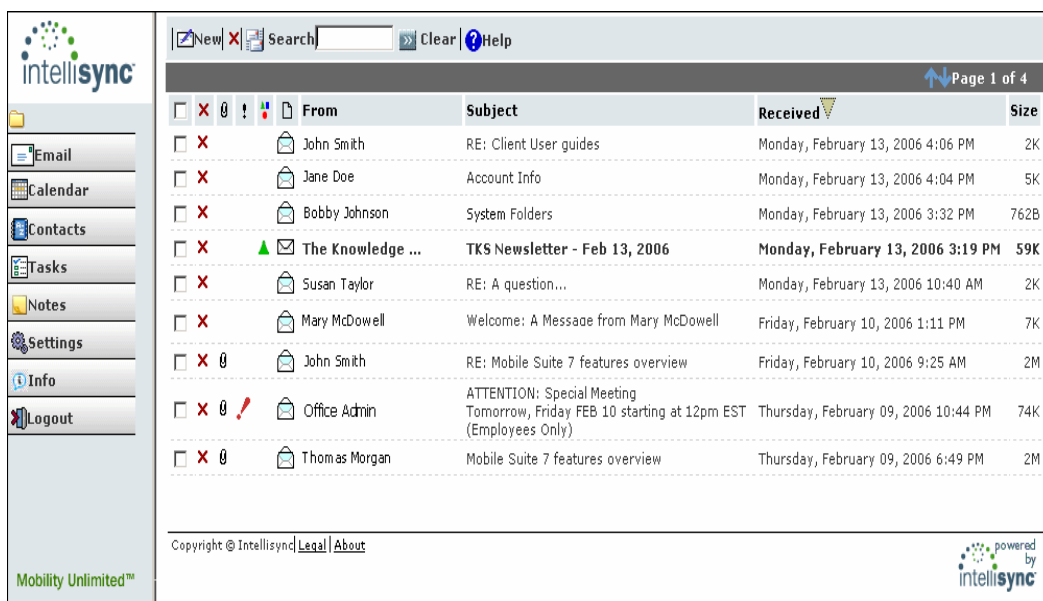
Intellisync Systems Management updates your device with the latest software from headquarters and gives administrators tools to troubleshoot any problems you might have with synchronization. It also provides backup and restore capabilities in case your device is ever damaged, lost, or the battery is completely drained.

Intellisync File Sync can send file and website updates to your device while you are mobile. When a document changes, only the changes are sent to your device. Sending only changes and not the entire document reduces the amount of time that you need to be connected.

Intellisync Data Sync mobilizes enterprise applications by synchronizing the data between various back end data sources, such as Oracle, DB2, and SQL Server, and the local database on mobile devices such as laptops, tablets, and PDAs. Intellisync Data Sync uses a store-and-forward architecture and synchronizes the data while the client is offline to optimize the user experience and provide high scalability.

Login page

2. Enter your user name and password, and then click **Login**. The Intellisync Mobile Suite Web e-mail page appears.



E-mail page

Using Web navigation

Intellisync Mobile Suite on the Web has a left navigation bar with the following icons:

Email. Displays your e-mail. You can view, delete, search, or create e-mail messages.

Calendar. Displays your calendar. You can select different calendar views.

Contacts. Displays your contacts list. You can create or search for a specific contact.

Tasks. Displays your task list. You can add, delete, or mark tasks as completed.

Notes. Displays your notes. You can create notes and assign to a customized category.

Settings. Displays the Settings page. You can add sync devices, manage your server connections, and configure your account settings.

Info. Displays weather based on your zip code. You may also view any trip itineraries or Appointment Plus information.

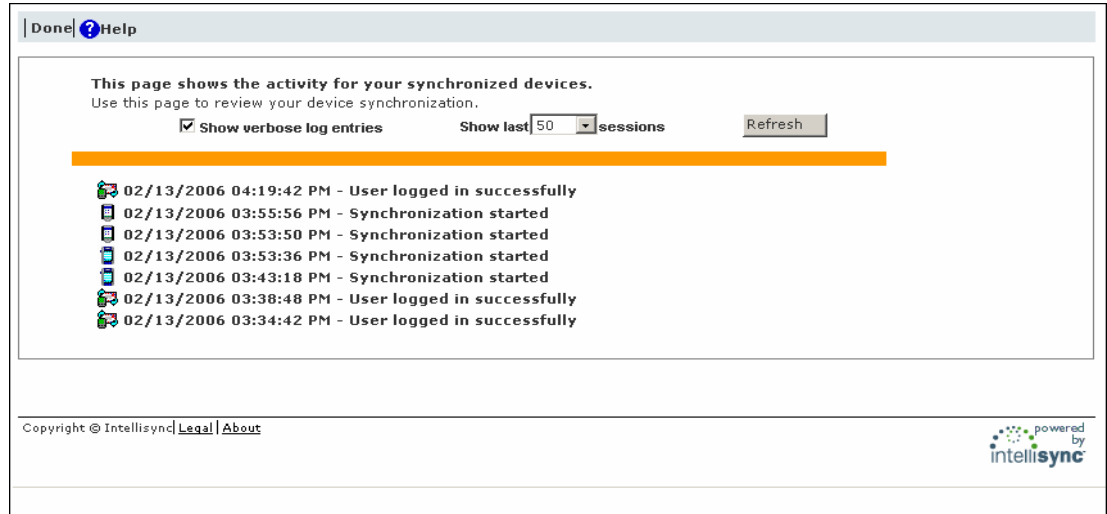
Log Out. Logs you out of the Web application.



The Web application also has an online help system with detail instructions and information.

Viewing your activity log

When you use Intellisync Mobile Suite on the Web, you can review the status of a synchronization session with your device. To view an activity log for a synchronization session, click **Settings** on the left navigation bar, and then click **View Activity Log**. The Activity Log page appears.

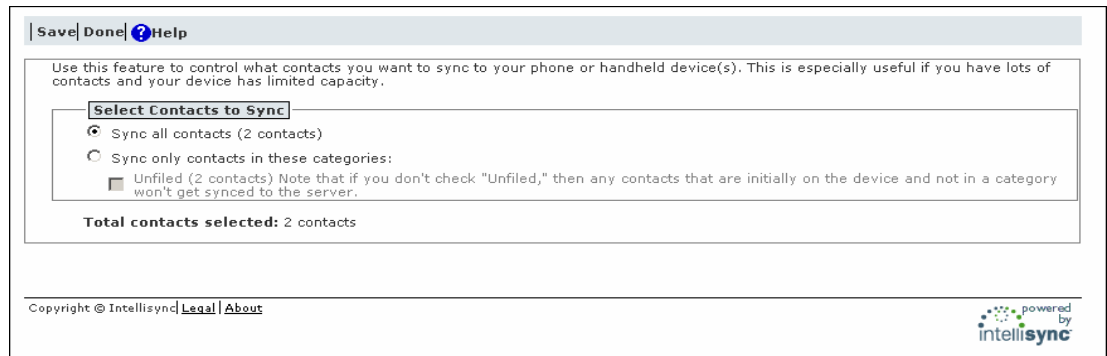


Activity Log page

Selecting contacts to synchronize

You can select which contacts you want to synchronize to potentially reduce the amount of data transferred between your company's server and your device. To take advantage of this feature, you must first assign a category to each contact using your company's e-mail software (such as Microsoft Exchange, Lotus Domino, or Novell GroupWise). Afterward, you can use Intellisync Mobile Suite on the Web to select the categories you want to synchronize.

To select the contact categories to synchronize, click **Settings** on the left navigation bar, and then click **Pick Contacts to Sync**. The Pick Contacts to Sync page appears.



Select Contacts to Sync page

On this page, you can select the categories of contacts you want to synchronize to your device. Intellisync Mobile Suite scans your contacts to find which categories are present and how many contacts are in each category.

Contacts who are not assigned to a category appear as “Unfiled.” If you do not select **Unfiled**, any contacts initially on your device and not assigned to a category will not be synchronized to your company’s server.

Setting up Push options

You can set up Push options using Intellisync Mobile Suite on the Web. Using Push options allows you to stay up-to-date without having to initiate a synchronization session.

To set up your Push options, click **Settings** on the left navigation bar, and then click **Push Settings**. The Configure Push page appears.

Save Done Help

Your device can be configured to receive updates automatically. For example, when an email is sent to you, your device can automatically receive this message. You can set up your device so you never have to press the "Sync" button to stay up to date. Modify your push preferences below.

Push Monitor Settings

Information to monitor:

Email Calendar Contacts Tasks Notes

When do you want the information pushed to you:

Every day Limit push to within these hours: From: 6:00 AM to: 10:00 PM

Push Settings - Email Messages

Push all email

Push email based on the following limits:

Only if email is marked unread And, only if your name is in the 'To' list

And only if:

Sender name contains:

(Examples: John Doe , acme , @acme.com , john.doe@acme.com)
Note: You cannot use Lastname, Firstname syntax in this list. Use the user's full email address instead.

Or, Subject contains:

(Examples: Attention Required , Sales)

Or, if email is marked High Priority or Urgent Or, if email is a Meeting Request

And only if:

Subject does not contain:

(Examples: Attention Required , Sales)

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Configure Push page

Regardless of how you set up your options using Intellisync Mobile Suite on the Web, you synchronize the Inbox when you send an e-mail message. For example, if you set up your Push filter to receive e-mail messages from only one person, no e-mail messages are pushed until the specified person sends you an e-mail message. Then, the entire contents (any new items) of your Inbox are synchronized to your device.

Guidelines for setting up Push options using the Web

When you begin using Push settings, consider using filters to impose a limit on number of the e-mail messages you receive. For example, in Push Monitor Settings, choose to monitor e-mail only. For Push Settings, choose to receive messages that are only marked as unread.

Remember, the complete contents of your Inbox are synchronized for every Push session, but a Push session is not triggered until your filter criteria are met. As you become familiar with how Push settings work in your environment, adjust your filters for better performance.

Adding an alert device

In addition to setting up Push options for your device, you may also add an alert device using Intellisync Mobile Suite on the Web. An alert device can receive notification of e-mail messages, calendar changes, appointment reminders, or trip itineraries. These alerts appear on your alert device as an SMS text message.

To add a new alert device, complete the following steps:

1. Click **Settings** on the left navigation bar, and then click **Add Alert Device**. The Choose Device page appears.

Back | Next | Help

Choose device
Select the kind of device on which you want to receive alerts. You can filter these alerts after you have defined the settings for sending an alert to this device.

Alert Devices

- Mobile phone capable of receiving short email (SMS) messages
- Alphanumeric pager capable of receiving short email messages messages
- Email Address for your Mobile Phone

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Choose Device page

2. Select the type of alert device you want to add, and then click **Next**.
3. Follow the instructions on your screen and provide the required information about your alert device. Depending on the type of alert device you have, you may be asked for your service provider (or carrier) or e-mail address.

Guidelines for setting alerts

Use the following guidelines for effective setup and management of alerts.

- Many service providers and carriers use a different billing structure for SMS messages. If you go over your allotted number of SMS messages within a billing period, you (or your company) may be charged additional fees. Check with your system administrator, department manager, or service provider to find out about SMS messaging restrictions.
- Too many SMS messages may become an annoyance. You can only change your alert criteria using Intellisync Mobile Suite on the Web. Test your alert criteria in an environment where you have access to the Web so you can make adjustments as necessary.
- Be selective about the alert criteria to give yourself a chance to gauge the volume of alerts you receive. Use this step-by-step approach until you reach the level of alerts that is most appropriate for you. Again, balance this approach with the limits set up by your company.

Using Appointment Plus

You can use Appointment Plus to enter additional information for calendar events. Click **Calendar** on the left navigation bar, and then click **New**. The New Calendar Event page appears. Enter the information for the event, and then click **Appointment Plus**.

The screenshot shows the 'Appointment Plus' form in the Intellisync Mobile Suite web interface. The top navigation bar includes buttons for 'Save', 'Invite attendees', 'Appointment plus' (highlighted with a red box), 'Trip', 'Close', and 'Help'. The form fields are as follows:

- Subject: [Text input field]
- Location: [Text input field]
- Start Date: 2/15/2006 [Calendar icon]
- Start Time: 1:00 PM [Dropdowns for hour, minute, and period] [All Day Event checkbox]
- End Date: 2/15/2006 [Calendar icon]
- End Time: 1:30 PM [Dropdowns for hour, minute, and period]
- Duration: 0 Days 0 Hours 30 Minutes [Dropdowns for days, hours, and minutes]
- Importance: Normal [Dropdown menu]
- Reminder: [Checkbox] 15 Minutes [Dropdown menu]
- Show Time As: Free [Dropdown menu]
- Categories: [Text input field]
- Body: [Large text area]

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New Calendar Event page

Enter information for any of the applicable sections, and then click **Done** to return to the calendar event.

Done | Cancel | ? Help

Appointment Summary

Subject:

Meet with: Job title:

Company: Phone:

Email: Mobile:

Meeting Location

I'll call them at this number:

They'll call me

Meet in person at:

Street:

City: State/Province:

Zip/Postal code: Country/Region:

Meeting Location | **Mobile Reminder Options**

Gather Directions

Send reminder 15 before
Eastern Time (US & Canada) (GMT-5:00)

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Appointment Plus

Viewing Appointment Plus entries

You can view Appointment Plus entries. Click **Info** on the left navigation bar, and then select the **Appointment Plus** tab. To view or edit Appointment Plus information, click the calendar event link.

Home | Appointments Plus | Sales Meetings

Friday, 2/17/2006

1:30 PM - 2:00 PM [Marketing Strategy Meetings](#)

Meet in person at:
220 North Point Center East
Alpharetta, Georgia 30022
[directions](#)

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Appointment Plus tab

Creating trip itineraries

You can create trip itineraries for calendar events. Click **Calendar** on the left navigation bar, and then select **New**. The New Calendar Event page appears. Enter information for the event, and then click **Trip**.

The screenshot shows the 'New Calendar Event' page. At the top, there is a navigation bar with buttons: Save, Invite attendees, Appointment plus, Trip (highlighted with a red box), Close, and Help. Below the navigation bar, the form has the following fields:

- Subject: [Text input]
- Location: [Text input]
- Start Date: 2/15/2006 [Calendar icon]
- Start Time: 1:00 PM [Dropdowns] All Day Event
- End Date: 2/15/2006 [Calendar icon]
- End Time: 1:30 PM [Dropdowns]
- Duration: 0 Days 0 Hours 30 Minutes [Dropdowns]
- Importance: Normal [Dropdown]
- Reminder: 15 Minutes [Dropdown]
- Show Time As: Free [Dropdown]
- Categories: [Text input]
- Body: [Large text area]

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New Calendar Event page

On the Trip page, enter the name of the trip. You may also add flight, car rental, and hotel information. After entering information for the trip itinerary, click **Done** to return to the calendar event.

The screenshot shows the 'Trip' page. At the top, there is a navigation bar with buttons: Done (highlighted), Add Flight, Add Car Rental, Add Hotel, Cancel, and Help. Below the navigation bar, the form has the following fields:

- Name of Trip: Shareholder Meeting [Text input]
- Itinerary: [Section header]
- [No items.] [Text area]

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Trip page

Adding flight information

Click **Add Flight**. The Flight Information page appears. Enter any applicable information, and then click **Done** to return to the Trip page.

The screenshot shows the 'Flight Information' page. At the top, there is a navigation bar with 'Done', 'Cancel', and 'Help' buttons. Below this, the text 'Type in your flight information below:' is followed by several input fields: 'Airline', 'Flight #', 'Departing from', 'Confirmation #', 'Date' (with a calendar icon), 'Time' (with dropdowns for hour, minute, and AM/PM), and 'Seat'. There are also 'Arriving at' and 'Date' (with a calendar icon) and 'Time' (with dropdowns for hour, minute, and AM/PM) fields. A 'Mobile Reminders' section contains a checkbox for 'Send reminder', a dropdown for '0 Minutes', the text 'before flight', and a dropdown for 'International Date Line West (GMT-12:00)'. At the bottom, there is a copyright notice 'Copyright © Intellisync | About' and the Intellisync logo.

Flight information

Adding car rental information

Click **Add Car Rental**. The Car Rental Information page appears. Enter any applicable information, and then click **Done** to return to the Trip page.

The screenshot shows the 'Car Rental Information' page. At the top, there is a navigation bar with 'Done', 'Cancel', and 'Help' buttons. Below this, the text 'Type in your car rental information below:' is followed by several input fields: 'Rental company', 'Confirmation #', 'Phone #', 'Pick up' (with a calendar icon), 'Time' (with dropdowns for hour, minute, and PM), 'Drop off' (with a calendar icon), and 'Time' (with dropdowns for hour, minute, and PM). At the bottom, there is a copyright notice 'Copyright © Intellisync | About' and the Intellisync logo.

Car rental information

Adding hotel information

Click **Add Hotel**. The Hotel Information page appears. Enter any applicable information, and then click **Done** to return to the Trip page.

Done | X Cancel | ? Help

Type in your hotel information below:

Check in: 2/14/2006 Confirmation #:

Check out: 2/14/2006 Phone:

Hotel name:

Address:

City: State/Province:

Zip/Postal code: Country/Region:

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Hotel information

Viewing trip itineraries

You can view calendar events with trip itineraries. Click **Info** on the left navigation bar, and then select the applicable calendar event tab. To view or edit a trip itinerary, click the calendar event link.

Home | Appointments Plus | Sales Meetings

TRAVEL ITINERARY

Sales Meetings

Mon, 2/13 Delta 45
Departs Chicago 7:03 PM
Arrives Atlanta 9:06 AM

Mon, 2/13 Hertz
Pick Up Mon, 2/13 8:30 PM
Return Tue, 2/14 5:02 PM

Tue, 2/14 Delta
Departs Atlanta 9:13 PM
Arrives Chicago 8:38 PM

Tue, 2/14 Hilton
Check In Tue, 2/14
Check Out Tue, 2/14

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Trip itinerary tab

Using the Personalized Info option for trips

Intellisync Mobile Suite offers a separately purchased option that can review itineraries of specific formats. If you purchase this feature, Intellisync Mobile Suite can send trip itineraries to your device. These trip itineraries show up automatically on your device based on your last successful synchronization session.

Since itinerary formats vary, you should save any e-mail messages containing your itineraries until you complete your trip so you can retrieve information that is not imported into your calendar.



Verify that you have the trip confirmation e-mail messages on your device to use as an additional reference. Due to various itinerary formats, flight information such as e-ticket numbers may not import to your device.

Using the Personalized Info option, Intellisync Mobile Suite checks incoming e-mail messages for travel itineraries. If Intellisync Mobile Suite locates an itinerary, the software automatically creates a trip itinerary.

The travel itinerary parser has new support for the latest Apollo, Amadeus, and Expedia formats. The supported travel formats including the following:

Air New Zealand	Cendant	Holiday Inn	ResFAX
AirTran Airways	CMC	Hooters Air	Ryanair
Alaska	Continental	Hotels.com	Southwest Airlines
Alitalia	Delta Airlines	Hyatt Hotels	STA Travel
Amadeus	Doubletree	iAnywhere	Travelocity
American Airlines	easyJet	JetBlue Airways	Travelodge
American Express	Expedia	Marriott Hotels	United Airlines
Apollo	Four Points	Microsoft Internal	VIA Travel Group
ATA	Frontier Airlines	MS Group	Virgin Express
Avis	Galileo ViewTrip	Munich	World Travel
British Midland	Hampton Inns	Northwest Airlines	WorldSpan
Cain Travel	Hertz Rental	Orbitz	
Casto – EnCoRRe	Hilton Hotels	Protravel	

Use the following explanations for troubleshooting when a trip itinerary does not import to your device:

- The e-mail format is not supported.
- ▶ To suggest formats for inclusion in upcoming releases, forward your itinerary e-mail messages to travelinfo@intellisync.com. If possible, send several itineraries from the same provider.
- The travel provider has changed the format of their e-mail messages.
- The last name listed on the trip does not match the last name stored in Wireless Email. Some itineraries require that the e-mail address match. This requirement verifies that users will not have other trip itineraries sent to their device.
- The trip occurs outside the date range for maintaining calendar entries.
- The e-mail message has been forwarded with prefix characters other than the usual “>” character.
- The user’s e-mail software considered lines from the original e-mail message too long, and inserted carriage returns. This situation often occurs when an e-mail message has been forwarded many times.
- The e-mail message has been forwarded many times and has a number of headers included in the body of the e-mail message.

Viewing appointments and trips on your device

You can view any scheduled appointments or trips on your device. To view this information, follow these steps:

1. Using your device, select the **Intellisync** icon. The Intellisync Mobile Suite main menu appears.
2. Select **Info**. The default Home tab displays the current weather conditions based on your zip code as well as a 5-day forecast.
3. To view any scheduled trips, select the **Trip** tab.
4. To view any scheduled appointments, select the **Appt** tab.
5. Select the **Home** icon to return to the Intellisync Mobile Suite main menu.

Configuring Optional Settings

This chapter provides information on configuring optional account settings for Intellisync Mobile Suite on the Web.

The sections in this chapter are as follows:

- Changing performance settings
- Changing user information
- Changing Web application settings

Changing performance settings

You can determine how much data you want to store in your Inbox, Sent Items, and Calendar folders. Click **Settings** on the left navigation bar, and then click **Performance Settings**. The Performance Settings page appears.

Save | Done | ? Help

Performance Settings


Inbox: Maintain days in the past
 Sent Items: Maintain days in the past
 Calendar: Maintain days in the past

Maintaining old email messages and calendar appointments allows them to remain accessible from the web site and keeps them synchronized on your devices. In order to improve web site and sync performance, decrease the number of days in which old email messages and calendar appointments are maintained.

Maximum size of single email (attachments or body):19.0MB

Folder	Records	Size	Allowed Size
Contacts	0	0	Unlimited
Calendar	4	-153	Unlimited
Notes	0	0	Unlimited
Tasks	0	0	Unlimited
Favorites	0	0	Unlimited
Inbox	4	44.5k	Unlimited
Outbox	0	0	Unlimited
Sent Items	0	0	Unlimited
Deleted Items	0	0	Unlimited
Drafts	0	0	Unlimited
Total	8	44.3k	Unlimited

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Performance Settings page

Changing user information

You may modify any user preferences such as name, address, e-mail address, and other basic information. Click **Settings** on the left navigation bar, and then click **General User Information**. The Configure User Settings page appears.

Save Done Help

Enter your user information and preferences below.

Configure User Settings

First Name: Last Name:

Company:

Street:

City: State/Province:

ZIP/Postal Code: Country:

Email Address: Time Zone:

Phone:

Language:

Distance Units: Temperature:

To change your password, enter your old password and then enter your choice for a new password.


Old Password

New Password

Retype Password

Note: If you change your password here, you will have to manually update your password on all of your devices the next time you sync.

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Configure User Settings page

Changing Web application settings

You can change your settings for sending e-mail messages. Select **Settings** from the left navigation bar, and then select **Web Application Settings**. The Web Application Settings page appears.

Save | Done | ? Help

Web Application Settings

General

Items per Page:

Short Date Style:

Long Date Style:

Time Style:

Start Section:

Email

Preferred Edit Mode

Plain

HTML

Include Signature

Type signature here

Out of Office Reply

I am currently In the Office

I am currently Out of the Office

AutoReply only once to each sender with the following text:

Type your Out of Office reply here

Contacts

Check names first in:

Global Address List

Contacts

Calendar

Default View:

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Web applications settings page



APPENDIX

A

Quick Reference

Use the following as a quick reference for using Intellisync Mobile Suite with your Palm OS device.

Function	Instructions
View Intellisync Mobile Suite screen	Select the Intellisync icon.
Synchronization	Select the Intellisync icon. From the Intellisync Mobile Suite screen, select the Sync icon.
View e-mail and PIM information data on your device	Select the Intellisync icon, and then use the following: For Contacts, select the Contacts icon. For Calendar entries, select the Date Book icon. For Tasks, select the To Do icon. For E-mail, select the SyncMail icon.
View Travel Info	Select the Intellisync icon. From the Intellisync Mobile Suite screen, select Travel Info . For weather information, select the Home tab. For trip information, select the Trip tab. For appointment information, select the Appt tab.
View or change categories selected for synchronization	Select the Intellisync icon. From the Setup menu, choose Sync Settings .
Change Push/ReadySync settings	Select the Intellisync icon. From the Setup menu, choose Push/ReadySync .

Function	Instructions
Change connection settings	Select the Intellisync icon. From the Setup menu, choose Connection Settings . Contact your system administrator for the appropriate values.
Enable security settings	Select the Intellisync icon, and then select the Security icon.
View logs	Select the Intellisync icon. From the View menu, choose Log .