



# **User's Guide**

## **TrueSync® Desktop and TrueSync Plus for REX™**

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# *Introduction*

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## ***Introducing REX and REX PRO***

Congratulations on your purchase of REX™ or REX™ PRO! Your REX card represents the next generation in ultra-portable technology that keeps all the latest information at your fingertips so you will always be on time and on track.

A REX device is the size of a credit card, and yet lets you view thousands of appointments, addresses, To Do items, and memos. A REX PRO device is just as small and light, and will enable you to view and edit these items as well.

## ***About TrueSync Desktop 2.0***

TrueSync® Desktop 2.0 is a full-featured PC organizer for managing and mobilizing Calendar events, Contacts, To Do items, and Memos. It is now sleeker and faster to help you stay productive at the office, at home, and on-the-go.

Using TrueSync Desktop, you can:

- ◆ Manage your calls, meetings, and To Do items in the Calendar view, and see your schedule by day, week, or month.
- ◆ Store thousands of names, addresses, phone numbers, memos, and other contact information in the Contacts view.
- ◆ Track the time in multiple time zones and in more than 500 cities around the world in the EarthTime view.
- ◆ Create letters, presentation notes, driving directions, and other information in the Memos view.
- ◆ Print cards, calendars, and other information in a variety of formats.
- ◆ Synchronize your information among TrueSync Desktop and your device(s) and/or service(s).

## ***About TrueSync technology***

TrueSync Desktop comes with Starfish's TrueSync synchronization technology built in. This unique, patented technology allows you to use TrueSync Desktop at home or the office, while assuring that your information is current and accessible to you while you're on-the-go.

TrueSync technology can be implemented in two ways with REX and REX PRO:

- 1 TrueSync Desktop, which is the Personal Information Manager, and, optionally:
- 2 TrueSync Plus for REX, which provides direct synchronization among REX, REX PRO, the TrueSync Desktop, and other supported Personal Information Managers, services, and devices.

**TrueSync Desktop's built-in TrueSync technology lets you:**

- ◆ Synchronize your TrueSync Desktop data with your REX and REX PRO devices, so you'll always have the most current names, addresses, phone numbers, appointments and notes—whether you have entered them on the PC or your hand-held devices.
- ◆ Easily add synchronization capability in the future for supported devices and services (see [www.starfish.com](http://www.starfish.com) for free TrueSync Accessor downloads, including Windows CE 2.0 devices) so your investment in the latest technology pays productivity dividends in the future.
- ◆ Choose how you want your data synchronized. TrueSync's unique multi-point synchronization allows you to synchronize your TrueSync Desktop data simultaneously among all your installed devices and services at once. This means all the places you keep your data can be updated quickly and directly!
- ◆ Upgrade any previous installation of TrueSync software. TrueSync Desktop 2.0 will automatically preserve your existing TrueSync setup and allow you to continue to use your installed device(s) so you will be up and running fast!

**NOTE** If you have more than one device, TrueSync Desktop can synchronize each of them. See “Setting up multiple users” on page 106 to learn more.

*Using your device  
with other  
desktop  
applications*

TrueSync Desktop features extensive import capabilities, so you can start using your device quickly even if your information is in another PC organizer format. For example, you can import, or copy, files from popular organizer programs such as Microsoft Outlook, Schedule+, Lotus Organizer, and ACT! into TrueSync Desktop. Then you can synchronize those files to your device and/or service. For further information on import capabilities from particular programs, refer to Starfish's Import Matrix at [www.starfish.com](http://www.starfish.com).



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## ***Supported desktop applications***

TrueSync Desktop supports importing data from the following versions of these popular applications:

- ◆ Microsoft Outlook 97 and Outlook 98
- ◆ Microsoft Schedule+ 7.0, 7.0a, and 7.5
- ◆ Symantec ACT! 3.0.6, 3.0.7, 3.0.8, and 4.0
- ◆ Lotus Organizer 97/97GS (.or3 and .or4 files only)
- ◆ ASCII tab-delimited and comma-delimited, dBASE III and IV, and Spreadsheet DIF (Contacts only)

If the version you are using is not listed here, check the Franklin Web site for updates at: <http://www.franklin.com/support/default.htm>.

**NOTE** If there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see “The Readme file” on page 10.

---

## ***About TrueSync Plus for REX***

TrueSync Plus is bundled with certain REX PRO devices, and is also sold by Starfish for other devices. If you install TrueSync Plus for REX, you can use it to synchronize your REX or REX PRO card directly with any supported desktop applications or services, without having to import data. This allows you to continue to use your preferred organizer, rather than switch to TrueSync Desktop.

You can use TrueSync Plus for REX with multiple clients. For example, you can synchronize your Outlook 98 files with your REX PRO card. Or, if you want, you can synchronize TrueSync Desktop, Outlook 98, and your REX card.

You can specify which information you want to synchronize. In addition, the two-way synchronization feature lets you check off a To Do item on your device and, when you synchronize, automatically check off that item in your desktop application’s task list.

To learn more, and for a list of which clients are supported, see “Using TrueSync Plus for REX” on page 106.

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## ***About the documentation***

This *User’s Guide* explains everything you need to know about using TrueSync Desktop and TrueSync Plus for REX.

The *Troubleshooter Guide* helps you get started and provides access to online resources. To view the TrueSync Desktop *Troubleshooter*

*Guide*, choose Help | Troubleshooter in TrueSync Desktop or click Start in the Windows Taskbar and choose Programs | TrueSync Desktop | TrueSync Desktop Troubleshooter. The Troubleshooter is an HTML document and starts in your browser.

The *REX User's Guide* and *REX PRO User's Guide* provide detailed information about using your device, and explain how to connect and use the docking station.

This *User's Guide* and the online Help system are designed to make information about TrueSync Desktop easy to find.

To help you understand what you see, here are some conventions used in this user's guide:

- ◆ Multilevel menu selections are separated with a vertical bar (|). So, where you see **File | Save**, it is a shorthand way of saying "Open the File menu, and then select the Save command in that menu." The menu choices always appear in the order you see them: Menu name first, then menu choice, then next menu choice, if there is one, such as **Calendar | Events | Single Day**.
- ◆ When you need to type some information, it is indicated in a different typeface: like *this*.
- ◆ Keys to press are indicated with a different typeface, like this: *F10*.
- ◆ Pressing two keys in combination is indicated with a plus sign (+), for example, *Ctrl+D*. Press and hold down the first key (*Ctrl*), and then press the second key (*D*).

## *Windows basics*

This User's Guide assumes that you have a basic understanding of Windows fundamentals—using the mouse or keyboard, working with windows, and so on. If you are new to the Windows environment, see your Windows manual or click the Start button and choose Help.

**NOTE** The illustrations in this User's Guide were created using sample data. Your screens may differ depending on the files you have open or information you have entered.

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## *Using online help*

Both TrueSync Desktop and TrueSync Plus for REX have detailed online help systems. Help appears in a separate window with its own controls.

Major features of TrueSync Desktop, such as the views, are discussed in a series of overview topics. Help topics that explain how to accomplish a task are in windows that you can leave displayed while you follow the procedure.

**To open Help, do one of the following:**

- ◆ Press *F1*. For help on a particular menu command, select the command and press *F1*.
- ◆ Click the Help button in a dialog box, or press *F1*, for help about dialog box controls.
- ◆ Choose a command from the Help menu on the TrueSync Desktop or TrueSync Plus for REX menu bar.
- ◆ Select a log message in the TrueSync view synchronization log and press *F1*.

***ToolTips***

If you pause while passing the mouse pointer over an object like an icon or Toolbar button, the name of the object is displayed. This feature, called ToolTips, makes it easy for you to identify what you see and find what you need.

***Helpful tips***

In addition to online help, you will find a file of helpful hints and tips for using TrueSync Desktop in the Memos view.

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***For more information***

There are several sources for more information about REX and REX PRO, including other printed documentation, the Internet, and telephone technical support.

***Printed documentation***

Your first source is the user's guide that you are currently reading, as well as the *REX User's Guide* and *REX PRO User's Guide*, which explain in detail how to use your device and the docking station. These manuals will answer most of your questions.

The *REX Quick Start Guide* and the *REX Key Guide* may also have been provided with your device for quick reference.

***The Internet***

A second useful source of up-to-date information is the Internet. For fast and free, 24-hour online technical support, go to the Franklin Web site at <http://www.franklin.com/support/default.htm>. You can also order a docking station or more REX cards at the Web site.

To learn the latest about TrueSync Desktop, TrueSync Plus for REX, Sidekick, and other Starfish products, visit the Starfish Web site at <http://www.starfish.com>.

***Telephone  
technical support***

If you need technical support, or want to order TrueSync Desktop or other components, please call 609-386-8997 from inside or outside the United States, between 8 a.m. and 8 p.m., Eastern time, Monday through Friday.

# *Installation*

Before you install the TrueSync Desktop software on your computer, read the requirements section below to make sure that you have the necessary hardware and software. Some features may require special configurations.

This chapter discusses:

- ◆ What you need to take full advantage of the features in TrueSync Desktop and TrueSync Plus for REX
- ◆ How to install TrueSync Desktop and TrueSync Plus for REX
- ◆ How to uninstall TrueSync Desktop and TrueSync Plus for REX

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## *Requirements*

To use TrueSync Desktop and TrueSync Plus for REX, you need:

- ◆ A computer running Windows 95, Windows 98, or Windows NT 4.0 (U.S. English version)
- ◆ A minimum of 15 MB hard disk space for installation of TrueSync Desktop (including 1 MB of temporary space on the same drive as your Windows directory for installation)
- ◆ A minimum of 15 MB hard disk space for installation of TrueSync Plus for REX (including 1 MB of temporary space on the same drive as your Windows directory for installation)
- ◆ 256-color VGA video and monitor
- ◆ An MPC 2 Compatible CD-ROM drive
- ◆ A pointing device compatible with Windows 95, Windows 98, or Windows NT 4.0
- ◆ A sound card and speakers, required to play sounds (.WAV files) for appointment alarms

A printer supported by Windows 95, Windows 98, or Windows NT 4.0, required to print from TrueSync Desktop

To synchronize information to your REX or REX PRO card, you must have either an available serial communications (COM) port and the docking station or a Type II PC Card (PCMCIA) slot. The REX and REX PRO devices were designed to use the standard Windows 95/98 PCMCIA drivers, which recognize the devices as Plug and Play. If your computer is using another, third-party driver and is not recognizing your REX or REX PRO card, consult the Franklin Web site for technical support:

<http://www.franklin.com/support/default.htm>

### ***Windows NT***

If you are using Windows NT 4.0, you need one of the following to synchronize with a REX or REX PRO device:

- ◆ A REX docking station. The docking station connects the device to one of the serial communication (COM) ports on your computer. The REX docking station is available from Franklin Electronic Publishers. You can order it directly online at the Franklin REX Web site:  
<http://www.franklin.com/rex>
- ◆ Award Software's CardWare NT. If you have Award's PC Card software package for Windows NT installed on your system, you can use a PC Card slot to synchronize with REX or REX PRO. Note that unless you are using CardWare, you will need to use the docking station to synchronize.

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## ***Registering your products***

Before you install, take a moment to read the Starfish Software License, Disclaimer of Warranties, and Limitation of Liability printed on the reverse side of the title page, and the Franklin Limited Warranty set forth just before the index of this manual.

Be sure to register both TrueSync Desktop and TrueSync Plus for REX so that you can receive product information and support.

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## *Installing your products*

For best results, before installing any products, you will need to decide whether to use TrueSync Desktop as your personal information manager or whether to continue to use another supported information manager program. If you decide to use TrueSync Desktop, you will not need to install TrueSync Plus. If you decide to use another supported information manager, you will not need to install TrueSync Desktop.

As with any product, Starfish recommends backing up your data files before installation and periodically as you continue to use the product. For help backing up your data, please visit the Starfish Web site at <http://www.starfish.com/service/backup/>.

**TrueSync Information Manager users:** The TrueSync Desktop installation program upgrades TrueSync Information Manager to TrueSync Desktop.

**Starfish Sidekick 99 users:** The TrueSync Desktop installation program upgrades your Sidekick 99 synchronization files so you can continue using Sidekick 99.

**NOTE** You cannot run both Sidekick and TrueSync Desktop at the same time.

**TrueSync Plus for REX users:** If an earlier version of TrueSync Plus for REX is already installed, the installation program updates your synchronization files so TrueSync will synchronize the REX PRO. To add the REX PRO card to your configuration, click Client | Add | Device from the TrueSync view menu bar.

### **To install TrueSync Desktop or TrueSync Plus for REX**

**1** Insert the TrueSync Desktop CD-ROM in your CD-ROM drive.

**NOTE** When you insert the TrueSync Desktop CD-ROM into your CD-ROM drive, the installation program should launch automatically. When this occurs, specify that you want to install either TrueSync Desktop or TrueSync Plus for REX, then follow the on-screen instructions. You can ignore the following steps.

**2** Click Start on the Windows taskbar and then choose Settings | Control Panel.

**3** Double-click Add/Remove Programs.

- 4 Click the Install button.
- 5 At the “Install Program From Floppy Disk or CD ROM” screen, click the Next button.
- 6 If necessary, use the Browse button to locate the program SETUP.EXE on the CD-ROM.
- 7 To begin the installation, click the Finish button, or click SETUP.EXE and then click the Open button.

**NOTE** You can open Sidekick version 2.0 and higher, TrueSync Information Manager, and earlier TrueSync Desktop files from within TrueSync Desktop 2.0. However, when you open these files, they are permanently converted to TrueSync Desktop 2.0 format. Therefore it is recommended that you back up your earlier files before opening them in TrueSync Desktop 2.0. Sidekick 99 files are interchangeable with TrueSync Desktop 2.0 files.

### *The Readme file*

If there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. You have the option of viewing the Readme file at the end of the installation process. To view the TrueSync Desktop Readme file at any time, click the Windows Start button, then choose Programs | TrueSync Desktop | Readme. View last-minute changes or additions to TrueSync Plus for REX by clicking the Start button, then choosing Programs | TrueSync Plus | Readme.

---

## *Uninstalling your products*

If you decide to remove TrueSync Desktop or TrueSync Plus for REX from your computer, use the uninstall program.

The uninstall program permanently removes all of the product’s program files and entries in the Windows Registry. If you have information files in the TrueSync Desktop folder, it does not remove them. You can preserve them or remove them manually from your data folder (usually Program Files\Starfish\TrueSync Desktop\Userdata), and then delete the folders if desired.

### **To permanently remove TrueSync Desktop from your computer**

- 1 Click Start on the Windows taskbar. Choose Settings | Control Panel.
- 2 Double-click Add/Remove Programs.



- 3** Choose TrueSync Desktop from the listed applications.
- 4** Click the Add/Remove button.
- 5** Click the Yes button.
- 6** After removing TrueSync Desktop, restart Windows.

### ***Uninstalling TrueSync Desktop for REX***

**To permanently remove TrueSync Plus for REX from your computer**

Follow the instructions above for removing TrueSync Desktop, except choose TrueSync Plus for REX in step 3. Delete the TrueSync folder (usually Program Files\Starfish\TrueSync), after backing up any data you may have created there that you want to keep.



# Overview

This chapter provides an overview of the many features of TrueSync Desktop that can help you organize and simplify your busy schedule.

The topics discussed in this chapter include

- ◆ Starting TrueSync Desktop
- ◆ The Desypad, icons, and Toolbars
- ◆ The major “views” of TrueSync Desktop
- ◆ TrueSync Desktop shortcuts and preferences
- ◆ Starting TrueSync and TrueSync Plus for REX

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## *Starting TrueSync Desktop*

Before using TrueSync Desktop, you must complete the installation process described in Chapter 1.

### **To start TrueSync Desktop**

In the Windows Taskbar, click the Start button and choose Programs | TrueSync Desktop | TrueSync Desktop.

## *First-time startup*

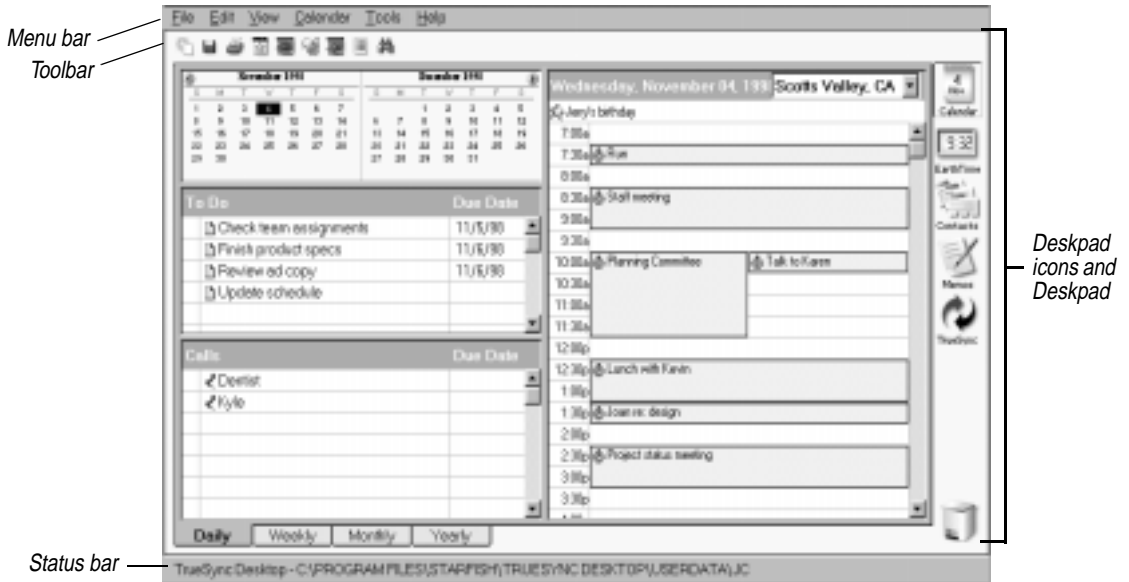
The first time you start TrueSync Desktop, the Setup Wizard helps you provide information about your name, company, and time zone.

The Setup Wizard panels are self-explanatory. If you need assistance, click the Help button in any Wizard panel.

Fill in the information in each panel of the Setup Wizard and click the Next button to continue. You can click the Back button if you need to change the information in an earlier panel.

## The TrueSync Desktop screen

The major components of TrueSync Desktop are displayed in the following illustration, which shows the Calendar view and identifies the features common to most views.



The **Toolbar** buttons let you do certain tasks quickly, without using the menus. The Toolbar and Menu bar change with each view. See “The Toolbar” on page 15 for more information.

The working area of the TrueSync Desktop screen is called the **Deskpad**. To change how the Deskpad appears and set other display options, choose Tools | Preferences | General. See “Setting preferences” on page 17 for more information.

The **Status bar** displays information about the current view. For example, if you are in the Calendar view, the status bar displays the name of the current Calendar file. To display the status bar, choose View | Status Bar in any view except EarthTime.

## Icons and views

Click a Deskpad icon to change to a different view in TrueSync Desktop. The views—and how to use them—are described in detail in later chapters of this User’s Guide. Since you will probably be moving back and forth among different views, here is a helpful command you should know: save your work in all views at once by choosing File | Save All.



In the **Calendar**, you can create appointments (events) and keep track of all your To Do items and calls. If you travel with your computer, your appointments adjust to the local time zone when you change to a new local time. You can print your calendar in a variety of formats, including page sizes suited to the most popular day planners, such as At-A-Glance, Day Runner, Day-Timer, and Franklin-Covey Planner. Using the TrueSync view, you can transfer your calendar events to your device and view them wherever you go.



**EarthTime** shows you the current time in eight cities that you select from more than 500 cities around the world. The eight cities and their times can be synchronized to your device.



**Contacts** lets you store names, addresses, e-mail addresses, phone numbers, and other information in your own personal cardfiles. Using the TrueSync view, you can transfer and view cardfiles on your device.



The **Memos** view provides you with a place to create memos and organize them in folders and files. You can also change fonts and format your documents. Using the TrueSync view, you can then transfer Memos to your device.



The **TrueSync** view lets you synchronize information with your device. Simply click the icon to change to the TrueSync view. Then click the TrueSync icon in the middle of the view window to start the synchronization.



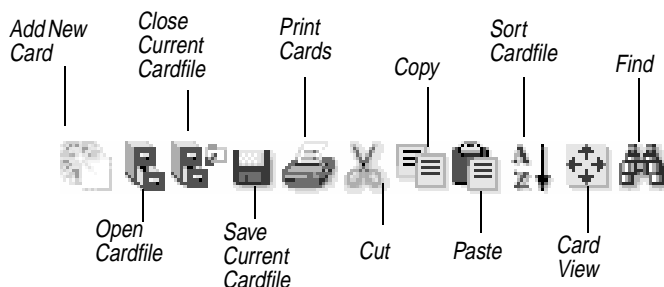
The **Delete** icon lets you remove items from TrueSync Desktop. To delete a card, memo, or calendar activity, drag it to the Delete icon on the Desktop.

## ***The Toolbar***

Most views in TrueSync Desktop have a Toolbar, which makes it quick and easy to perform standard actions in that view.

Point to a button with the mouse and pause to see a ToolTip identifying the button.

The Contacts Toolbar is shown here.



## Customizing the Toolbar

You can customize the Toolbar for each view, except EarthTime and TrueSync, to display the buttons that you want. You can add, move, or remove any of the available buttons from the Toolbar.

To customize the buttons on the Toolbar, from within the Calendar or Memos view, choose Tools | Preferences | Toolbar; from within the Contacts view, choose Tools | Toolbar; or double-click any open space on the Toolbar. The following dialog box appears:

To add a button

- 1 Click the button you want to add in the Available Buttons list.
- 2 Click the Toolbar Button you want to add it before.
- 3 Click Add.



To remove a button

- 1 Click the button you want to remove in the Toolbar Buttons list.
- 2 Click the Remove button.

From within the Customize Toolbar window, highlight the button you want to move, and click the Move Up or Move Down buttons to move the button to the desired location. The Move Up button moves the button to the left and the Move Down button moves the button to the right.

- ◆ To return the Toolbar to its original view, click the Reset button.
- ◆ Any changes affect only the Toolbar for the view that you are currently viewing. To make changes to a different Toolbar, select the desired view and make your desired changes.

---

## Shortcuts

TrueSync Desktop has other features, discussed in this section, that simplify the work you can do with your computer:

- ◆ **Shortcut menus.** Perform actions quickly in TrueSync Desktop by right-clicking and selecting a menu item from the shortcut menu.
- ◆ **Drag and drop.** Copy or move items using your mouse.

**NOTE** When you are moving Calendar events to a different type of list, only the text description is retained. For example, the time and duration of an event are lost if the event is moved to the To Do list; similarly, To Do attributes cannot be moved with an item to the Events pane.

### *Shortcut menus*

If you right-click certain TrueSync Desktop objects, such as a card or activity entry, a context-sensitive shortcut menu appears. These menus provide basic commands such as Cut, Copy, Paste, or other commands specific to that object or view.

### *Drag and drop*

Drag and drop is one of the easiest ways to move and copy entries from one TrueSync Desktop location to another. Several of the objects on the Desktop are drag and drop “targets.” For example, you can drag an item you want to delete to the Delete icon.

#### **To drag and drop an item**

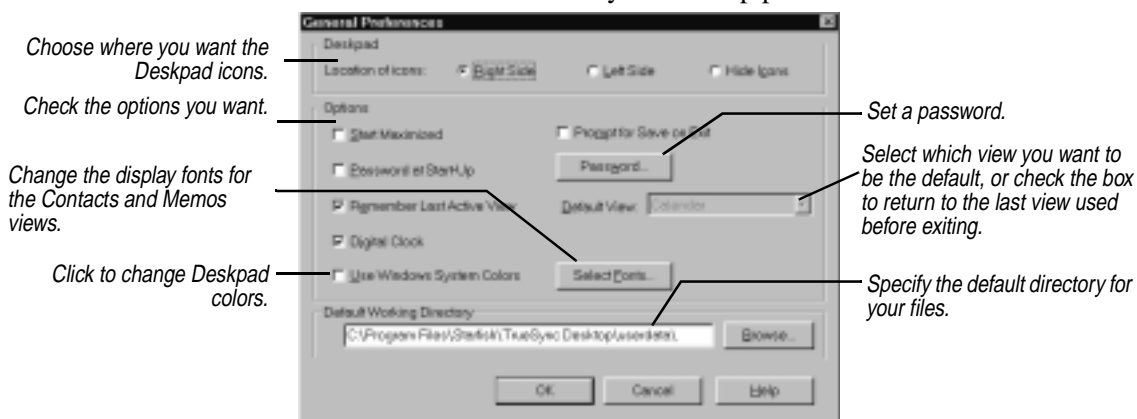
Point to the item, hold down the left mouse button (the cursor changes, indicating the item can be dragged), and drag the pointer to the place you want to drop the object. Release the mouse button. In the Contacts view, point to the index line in the Card list; in the Memos view, point to the subject line in the Memos list; in the Calendar view, point to the activity’s icon. Many of these items can be selected as a group, as described in later chapters. Items can only be dragged within a view or to the Delete icon.

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## *Setting preferences*

You can customize TrueSync Desktop by setting its preferences. Choose Tools | General Preferences in the EarthTime and Contacts

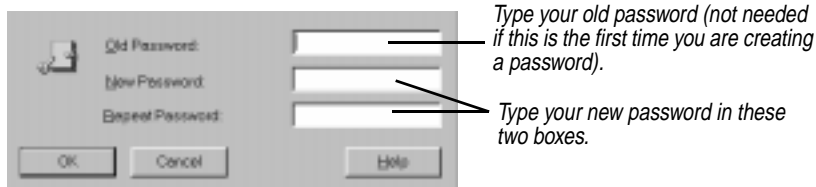
view and Tools | Preferences | General in the Memos and Calendar views for overall TrueSync Desktop preferences.



Most individual views have their own Preferences menus, discussed in later chapters.

### ***Using password protection***

You can set a password so that only someone with the password can open TrueSync Desktop. Check Password at Start-Up in the General Preferences dialog box (described in the preceding section). The Password Setup dialog box appears.



Always record your password and keep it in a separate location. Once you create a password, it is required to run TrueSync Desktop.

**NOTE** Your device may have a password of its own. The password for your device is not affected by the password for TrueSync Desktop.

### ***Transferring information from other organizers***

TrueSync Desktop can import cardfile and calendar information from other products such as Microsoft Outlook, Schedule+, ACT!, and Organizer, as well as use Sidekick files. To find out which versions of these products are supported, see “Supported desktop applications” on page 3.



If there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see “The Readme file” on page 10.

Note that you can open files from earlier versions of TrueSync Desktop and Sidekick. However, when you open these files with TrueSync Desktop 2.0, they are permanently converted to TrueSync Desktop 2.0 format. Therefore, it is recommended that you back up files from earlier versions before opening them. In the Calendar, Contacts, and Memos views, use File | Open *Filetype* to locate and open the files you want.

**NOTE** If you install TrueSync Plus for REX, you can synchronize information directly among supported desktop applications and services, TrueSync Desktop, and your device, without having to import data.

---

## *Starting TrueSync*

Use TrueSync to synchronize the latest information between TrueSync Desktop and your device. If you install TrueSync Plus for REX, you can synchronize directly with any of the supported desktop applications, services, and devices listed in “Supported desktop applications” on page 3.

**NOTE** Before you can use TrueSync Plus for REX, you must complete its installation process described in Chapter 1. To learn more, see “Using TrueSync Plus for REX” on page 106.



To start TrueSync, click the TrueSync icon on the Desktop or choose View | TrueSync. If you have installed TrueSync Plus for REX, the TrueSync view provides all of its features.

### *First-time startup*

The first time you start TrueSync, the Setup Wizard lets you select which information to synchronize. The Setup Wizard panels are self-explanatory. If you need assistance, click the Help button in any Wizard panel.

Fill in the information in each panel of the Setup Wizard and click the Next button to continue. You can click the Back button if you need to change the information in an earlier panel.



# The Calendar view



## TIP

Be sure that you set the Local Time so that the Calendar view displays your events based on the correct time zone. You can set the Local Time from either the time zone dropdown list in the Daily view of the Calendar or from the EarthTime view.

The TrueSync Desktop Calendar view is a powerful tool for helping you organize your appointments and other events. You can use the Calendar to schedule events, set reminders, and maintain a list of To Do items and phone calls.

Once you have updated your Calendar files, you can use the TrueSync view to transfer the latest information between TrueSync Desktop and your device. On your REX or REX PRO card, events appear in the Calendar, and To Do items and Calls appear on the To Do lists.

To change to the Calendar view, click the Calendar icon on the Desktop, press *F6*, or choose View | Calendar.

This chapter explains how to

- ◆ Enter events, To Do items, and Calls
- ◆ Schedule special days, recurring events, and multi-day events
- ◆ Search for specific entries
- ◆ Enter time zone information for events
- ◆ Set Calendar preferences and customize Calendar views

The following figure illustrates the Calendar view.

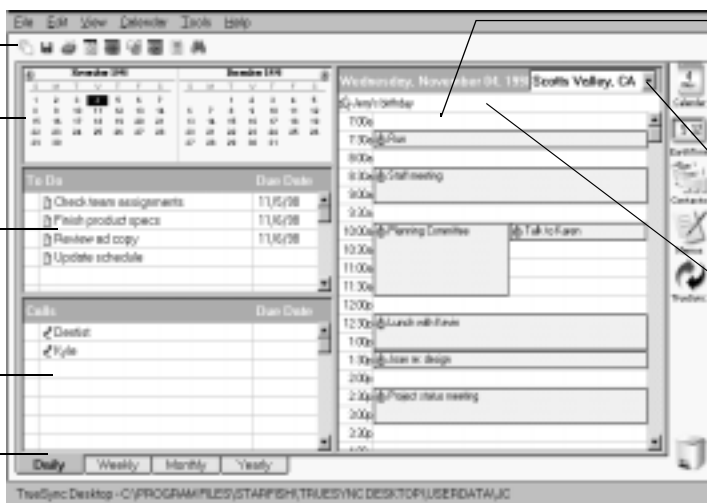
Toolbar (shown below)

The mini-calendar

The To Do pane shows the tasks you need to accomplish—including any you did not complete yesterday.

The Calls pane shows the calls you need to make.

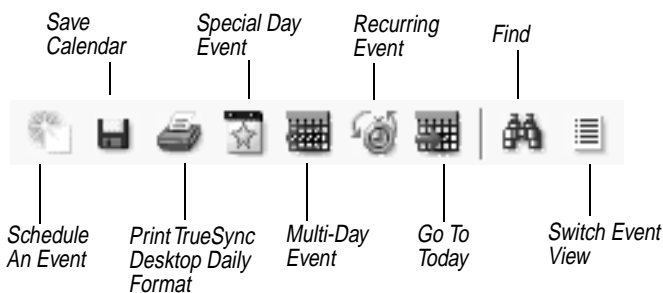
Click a tab to select the view of the Calendar you want.



The Events pane shows all the scheduled events for today.

The time zone drop-down list lets you change the Local Time.

Special days and Multi-day events appear at the top.



## Viewing your Calendar

You can view your personal calendar in four formats, including Daily, Weekly, Monthly, and Yearly views (discussed here and on page 35).

### To jump directly to today's calendar

Click the Calendar icon on the Desktop. If you have changed to another day or changed to another Calendar view, clicking the Calendar icon once returns you to the previous view, and clicking it a second time goes to today.

#### TIP

You can quickly jump to today's calendar from another date, or from Weekly, Monthly or Yearly views, by pressing **Ctrl+G**, selecting **Edit | Go To | Today**, or double-clicking the date on the mini-calendar.

## Selecting dates in the Daily view

In the Daily view, the selected date is highlighted in the mini-calendar.

Change to the previous or next month by clicking the left and right arrows.



Click a date in the mini-calendar to go directly to that day.

## List view and Time view

You can change between two views of your calendar's events:

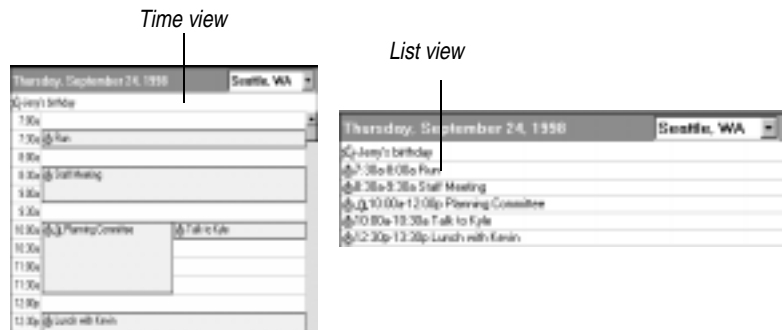
**Time view** shows the full view of your day, with booked and empty time slots displayed.

**List view** shows booked time only.



### To change between Time view and List view

Click the icon to toggle between Time view and List view.



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## Scheduling events

Enter your appointments and scheduled events on the Events list. You can have a maximum of 288 events scheduled throughout the day, and

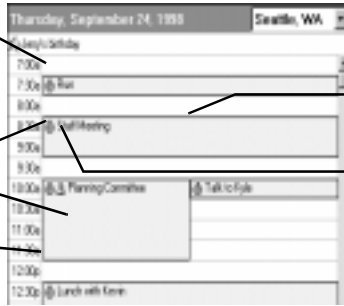
a maximum of three overlapping events starting at the same fifteen minute time slot.

Create an event by typing in an empty time slot, or click the starting time to open the Schedule an Event dialog box.

To change an event's starting time, drag its clock icon up or down.

Click an event and drag its bottom edge to change its ending time.

Double-click the event, or right-click the event and choose *Edit*, to edit its details.



Overlapping events appear side-by-side.

The bell icon indicates an alarm.

## ***Creating an event in the Events pane***

You can quickly create an event, without opening any dialog box, by typing in the time slot on the event day.

### **To create an event by typing in the time slot**

Click in the Events pane on the time you want to start your event, and type a description. You can adjust the event's duration by dragging the lower edge of the event down or up to lengthen or shorten the time. When you are done typing, press *Enter*.

### **To create an event from a Call or To Do item**

Drag a Call or To Do item (discussed later in this chapter) to the appropriate time slot in the Events pane. The Call or To Do item information is entered in the event information.

TrueSync Desktop automatically places a clock icon to the left of the event text. 🕒

**NOTE** When you are moving Calendar events to a different type of list, only the text description is retained. For example, the time and duration of an event are lost if the event is moved to the To Do list; similarly, To Do attributes are not moved with an item to the Events pane.

## ***Revising in the Events pane***

### **To edit an existing event's description or time**

Click anywhere in the event text to revise the description. You can change the starting time by dragging the event icon up or down in the Events pane. Change the ending time by dragging the bottom edge.


Use the Schedule An Event dialog box, described in the next section, to specify time more precisely, specify a different time zone, add a detailed note, read or revise existing notes, or set an alarm.

You can use drag and drop to move the event; simply drag the icon to the new time.

## ***Using the Schedule an Event dialog box***

There are numerous details of an event that you can set or modify using the Schedule An Event dialog box.

**To create or revise an event using the Schedule An Event dialog box, do any of the following:**

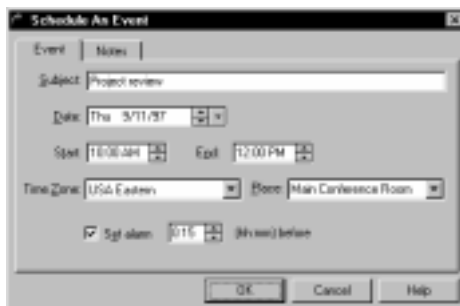
- ◆ Right-click in any time slot and select Edit.
- ◆ Click a starting time.
- ◆ Choose Calendar | Events | Single Day.
- ◆ Click the Schedule An Event button in the toolbar.
- ◆ Double-click the clock icon  for an existing personal event.



The Schedule An Event dialog box contains two tabs (pages) that provide all the details of your event. Fill in the information you need, as shown in the following illustrations, and click OK when you are finished.

### ***The Event Page***

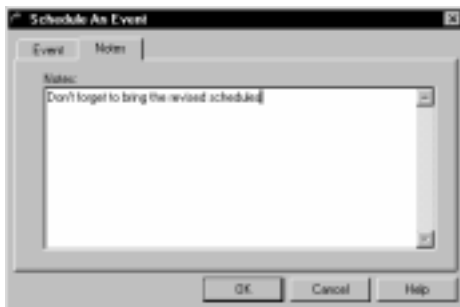
*When you finish with the Event page, click the Notes tab if you want to add a detailed note.*



- 1 *Type the subject.*
- 2 *Select the date by typing or using the arrows. The large arrow drops down a calendar.*
- 3 *Type or use the arrows to select the start and end times.*
- 4 *Select the time zone.*
- 5 *Type a Place or, if you have entered event locations previously, select from the list.*
- 6 *Click "Set alarm" to let you know ahead of time when the event will take place.*

Note that you can unintentionally create empty events by typing a space character in the Subject line of the Event Page or in a time slot in the Daily view.

## **The Notes Page**



Type a message or notes for the event.

To read or revise existing notes, open the Schedule an Event dialog box, click the Notes tab, and edit the text as desired.

## **Reminder Alarms**

If you want an alarm to sound in advance of the event on your computer or device (if your device supports alarms), check the Set alarm box on the Event Page and then specify the amount of time before the event. TrueSync Desktop checks for alarms every hour, quarter hour, half hour, and 3/4 hour. The time you set is in addition to that alert time. If you set a lead time, the alarm will display that much sooner than the alarm check.

For example, if you set an alarm for 1:10, and have set a five-minute lead time, the alarm will display at 12:55. Set the lead time to increase the warning time for an alarm.

**NOTE** You can set an alarm lead time up to 23 hours and 59 minutes. Set an alarm to sound on your device the day before an event by specifying a large lead time (if your device supports alarms). An alarm will sound on your computer only if it is set for the same calendar day as the scheduled event.

### **To set an alarm**

- 1 Choose Calendar | Events | Single Day, or click the time column of the Calendar. The Schedule An Event dialog box is displayed.
- 2 Type a subject in the Events page.
- 3 Adjust the Start and End time, if needed.
- 4 Check Set alarm.



- 5 Type or set a lead time for the alarm alert. The time is set in hours and minutes.

### To use an alarm when you do not have a sound card

Set the alarm following the instructions above. The Alarm dialog box displays on top of the software application you are running, provided TrueSync Desktop is open.

### To change the alarm sound

- 1 Click the Windows Start button, and click Settings.
- 2 Click Control Panel | Sounds.
- 3 In the Sound Properties dialog box, scroll down to TrueSync Desktop and click the Alarm option.
- 4 Select a sound from the Name drop-down list.
- 5 If desired, you can preview this sound by clicking the button next to the Preview option. When you are finished, click OK.

## Creating Recurring events

You do not have to type regularly repeated events one-by-one. You can specify the intervals in the Recurring Event dialog box, and let TrueSync Desktop add these events automatically.

The image shows a screenshot of the 'Recurring Event' dialog box. The dialog has a title bar 'Recurring Event' and a list of 'All Existing Events List' at the top. Below this are fields for 'Subject', 'Start' (with a calendar icon), and 'End' (with a calendar icon). A 'Notes' field is below that. The 'Timing' section includes radio buttons for 'Only', 'Weekly', 'Monthly/Date', and 'Monthly/Day'. Below these are 'From' and 'To' date pickers, and a 'Every' field with a dropdown menu. At the bottom, there are checkboxes for days of the week: 'Su', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sa', and 'Sun'. Buttons for 'OK', 'Cancel', and 'Help' are at the bottom right.

Annotations with arrows pointing to specific parts of the dialog:

- Enter the subject for your recurring event.* (points to the Subject field)
- Type notes or comments.* (points to the Notes field)
- Check if you want an alarm to remind you about the event, then specify how far in advance.* (points to the 'Get alarm' and 'In how many days before' fields)
- Specify the period over which the event recurs.* (points to the 'From' and 'To' date pickers)
- If you are modifying an existing recurring event, select it from this list before making changes.* (points to the 'All Existing Events List' dropdown)
- Enter start and end times.* (points to the 'Start' and 'End' date pickers)
- Click your choice here... and then choose the interval in this panel (see "Picking the interval for recurring events" on page 28).* (points to the 'Timing' radio buttons and the 'Every' dropdown)

 **TIP**

Another way to create a recurring event is to right-click an existing event or a blank event time, and choose **Recurring** from the shortcut menu.

## *Picking the interval for recurring events*

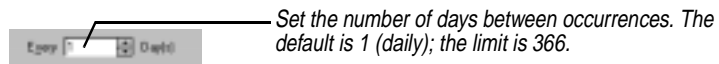
### To add recurring events to the Calendar

- 1 Choose **Calendar | Events | Recurring**.
- 2 Enter the subject text, notes, and other options.
- 3 Set the range of days, weeks, or months during which the event will recur using the **From** and **To** dates.
- 4 Choose the interval you want (see the following section). When you are finished, click **Add**.

You can pick one of four types of intervals for recurring events: daily, weekly, monthly by date, and monthly by day, as described in the following sections.

#### *Daily*

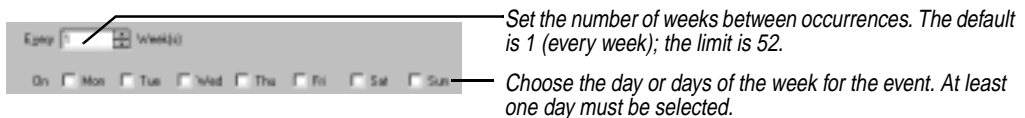
This option lets you set an event to repeat after a day or a number of days (for example, set 1 for every day or 10 for every 10 days).



**NOTE** You can change or delete recurring events at any time, either individually from the **Daily** view or globally through the appropriate recurring events dialog box.

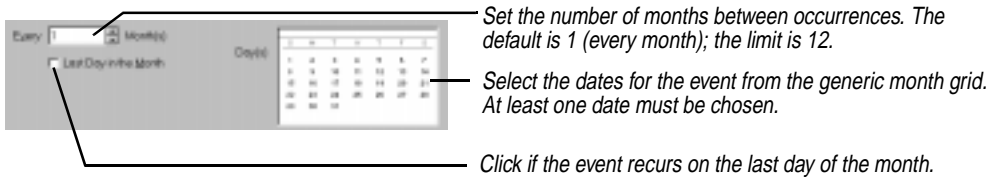
#### *Weekly*

This option lets you set an event to repeat on the same day every week, every other week, or any other weekly interval (for example, every Tuesday or Friday every third week).



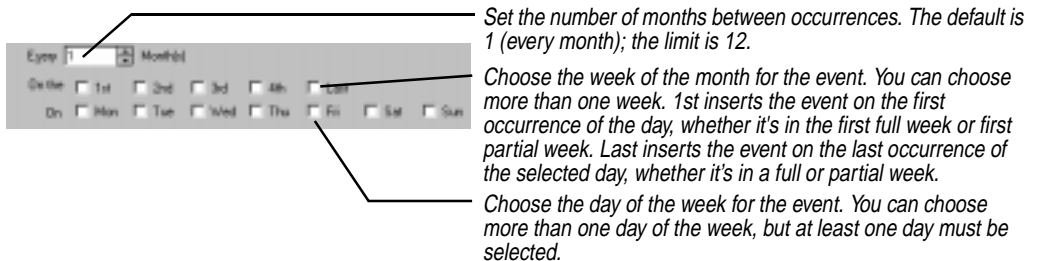
## Monthly by Date

This option lets you set an event to repeat on the same date every month or every number of months (for example, the 1st and 15th of every month, or the 25th of every other month).



## Monthly by Day

This option lets you set an event to repeat on the same day of the week every month or every number of months (for example, the first Tuesday of every month or the third Friday of every other month).



## Modifying and deleting recurring events

Modifying or deleting one instance of a recurring event does not affect others. You can, however, modify or delete all instances of the recurring event.

### To modify or delete an existing recurring event

- 1 Choose Calendar | Events | Recurring or right-click in the Events pane and choose Recurring from the shortcut menu.

- 2 In the Recurring list, click the pull-down list and select the item you want to change. (This list will be empty until you add a recurring event.)

Select the recurring activity you want to modify from the drop-down list.



- 3 Make changes in the schedule or text information if you are modifying it.
- 4 Click Change to modify all instances of the recurring event. Or click Delete to delete it; you will see a dialog box asking you if you want to delete all occurrences, today's and future occurrences, or today's and past occurrences. To learn how to change a single occurrence of a recurring event, see "Using the Schedule an Event dialog box" on page 25.

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## *Help for travelers: changing time zones*

Each event you schedule on your calendar includes time zone information, which you specify in the Time Zone drop-down list in the Schedule an Event dialog box (see "The Event Page" on page 25). Most of the time, this will probably be the same time as your home clock and this is the time TrueSync Desktop uses by default. But if you are planning a long-distance trip and will be taking your computer or your device, select the time zone of your destination when you enter events. TrueSync Desktop can then adjust your events when you change time zones. Thus, as you travel, you can always check with TrueSync Desktop to find out what is happening in that time zone.

## *When you travel*

When you travel, be sure to change the Local Time to your destination. Then all events you have scheduled there will appear in the correct Local Time. In addition, you will be able to see any events back home in “real time,” adjusted for your current location.

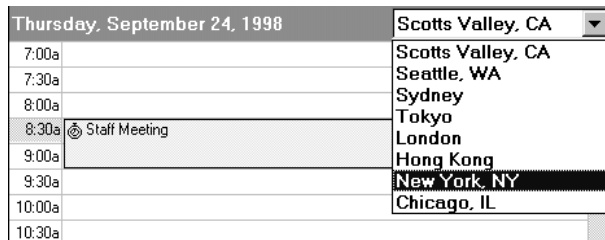
**NOTE** Because some cities and countries have varying practices regarding Daylight Savings Time, be sure to confirm local time on your arrival.

For example, when you enter the appointments for your trip to New York, you include the city (or time zone) for each one. Then, when you are in New York, change the Local Time in the EarthTime or Calendar view to New York time. Your events adjust to display in New York time, whether those events are in New York or elsewhere. Thus an event you need to attend in New York at 10 a.m. will appear at 10 a.m. on your calendar. If you need to phone in during a meeting in San Francisco that occurs at 2 p.m. (San Francisco time), it will appear on your calendar at 5 p.m. (New York time), so you know when to make the call.

After a synchronization, your device also displays the appointment times using the Local Time you chose on the desktop.

### **To change the Local Time from the Calendar view**

**1** Click the Local Time drop-down list.



**2** Select one of the eight cities.

If the desired city or time zone is not listed, then you need to change the displayed cities in the EarthTime view (see “Selecting cities” on page 84).

---

## *Entering To Do items*

You can enter tasks into your To Do list, and check them off when completed. TrueSync Desktop can forward any unfinished tasks to the next day if you choose this option in Preferences. You can also give a

To Do item a due date. TrueSync Desktop automatically assigns an order to To Do items within a particular due date according to the task name. If you wish to create a specific order for tasks, prefix your task names “A”, “B”, “C”, and so on. See the next section for details.



**To create a new To Do item, do any of the following:**

- ◆ You can click any blank line in the To Do pane and begin typing. When you begin typing, TrueSync Desktop places a To Do icon in front of the text. Note that you can unintentionally create empty To Do items by typing a space character in a blank line in the To Do pane.
- ◆ Choose Calendar | To Do Items or click the right column of a blank line in the To Do pane, which opens the To Do dialog box. Note that if you select Calendar | To Do Items without first selecting a blank To Do line, the text of an existing To Do item displays; you can then edit this text.

**NOTE** If there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see “The Readme file” on page 10.

***Revising To Do items***

**To edit the text of an existing To Do item**

Click in the item and edit as needed. You can open the To Do dialog box by clicking in the item’s right column or by right-clicking an item and choosing Edit from the shortcut menu.

***Setting the Due Date for To Do items***

You can set the due date from the To Do dialog box. When you assign a due date to a task, the To Do item turns red if not completed by that date.

Select the date by typing or using the arrows. The large arrow drops down a calendar.

---

## Using the Calls list

If you prefer to keep your phone calls separate from your To Do list, you can enter them in the Calls list. To enter a call item, do any of the following:

- ◆ Click any blank line in the Calls pane and begin typing. When you begin to type, TrueSync Desktop places a call icon in front of the text. Note that you can unintentionally create empty calls by typing a space character in a blank line in the Calls pane.
- ◆ Choose Calendar | Calls or click the right column of a blank line in the Calls Pane, which opens the Call dialog box, described in the next section. Note that if you select Calendar | Calls without first selecting a blank Calls line, the text of an existing Call displays; you can then edit this text.

TrueSync Desktop automatically assigns an order to calls within a particular due date. If you wish to create a specific order for calls, prefix your calls “A”, “B”, “C”, and so on.

## Revising Call items

You can edit the text of existing entries in the Calls list by just clicking on the text and typing. Or right-click an item and choose Edit from the shortcut menu.

## Setting the Due Date for Call items

You can set due dates for your calls from the Call dialog box. When you assign a due date to a call, the Call item turns red if not completed by that date.

Select the date by typing or using the arrows. The large arrow drops down a calendar.

## Setting call attributes

### To set call attributes

Click in the right column of a blank or existing call to enter or change details. The Call dialog box appears.

Enter the call recipient or subject.

Check box and type a due date or use the arrows. The Call item turns red if not completed by the due date.

The screenshot shows a 'Call' dialog box with the following fields and controls:

- Call:** A text input field containing the name 'Bruce'.
- Notes:** A text area containing 'final proposal' and a paperclip icon on the right side.
- Due Date:** A section with a checked checkbox and a date field showing 'Fri 9/25/99'.
- Completed:** An unchecked checkbox.
- Buttons:** 'OK', 'Cancel', and 'Help' buttons at the bottom.

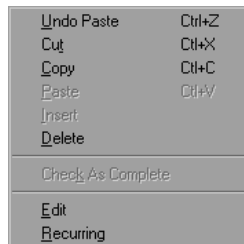
Enter any descriptive note text. A paperclip icon in the right column of a call indicates the call has an associated note. Click in the right column to read or modify the note or other call attributes.

## ***Modifying and deleting activities***

Using the shortcut menu, you can modify or delete an event, call, or To Do item.

### **To modify or delete an activity using the shortcut menu**

Right-click the item, and choose a command from the shortcut menu.



Choose Edit to revise or reschedule the activity, or Delete to remove it. The Recurring option opens the Recurring dialog box. Check As Complete places a checkmark next to an event to indicate that you have completed it. (Calls and To Do items are not recurring activities.)

---

## ***Customizing the Calendar***

You can change your Calendar configuration to suit your personal working methods.

### ***Setting Calendar Preferences***

To enter or modify the Calendar preferences, choose Tools | Preferences | Calendar while in the Calendar view. The Calendar Preferences dialog box appears.

Annotations for the Calendar Preferences dialog box:

- Set the beginning and ending times, and the time increment to display. The range is 12 a.m. to 11:45 p.m.
- Check if you want Start and End times displayed in the event slots.
- Set the number of days ago TrueSync Desktop looks to check for incomplete To Do items and Calls.
- Set the time TrueSync Desktop waits before repeating an alarm.
- Set the increments that will appear in the Daily view of the Calendar.

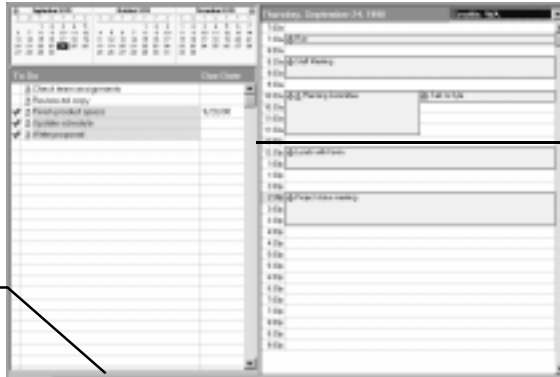


The Forward Incomplete Items setting determines whether to forward incomplete tasks daily and how far back TrueSync Desktop looks to find To Do items you have not checked off as completed. For best results, leave this value set to its maximum of 30.

### ***Customizing the Daily view***

You can customize the Daily view of the Calendar in many ways. You can resize the Events, Calls, and To Do lists by dragging their edges. You can make the Calls list disappear by dragging down its edge to the bottom of the To Do pane. The size and position of each pane is retained the next time you start TrueSync Desktop.

*The Calls pane has been closed (some people prefer to enter calls in the same list as To Do items). Drag upward here to reopen it.*



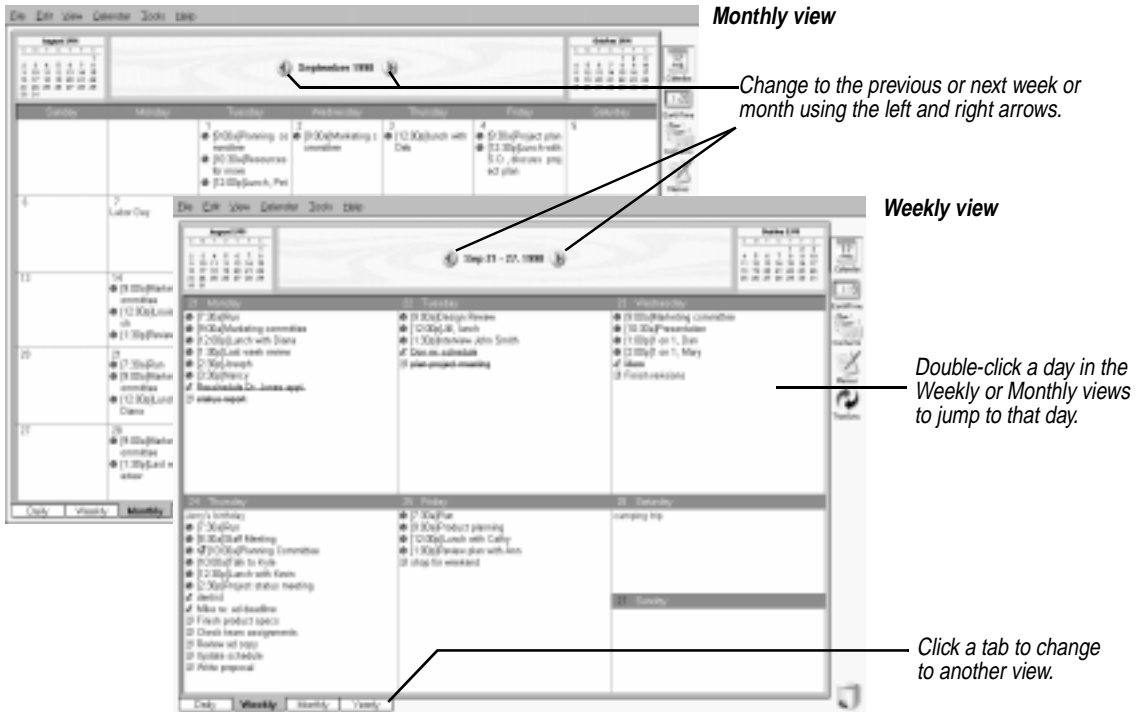
*Drag the border to change the width of the panes.*

---

### ***The Weekly and Monthly views***

The Weekly and Monthly views display events, calls, To Do items, special days, and multi-day events in standard calendar formats.

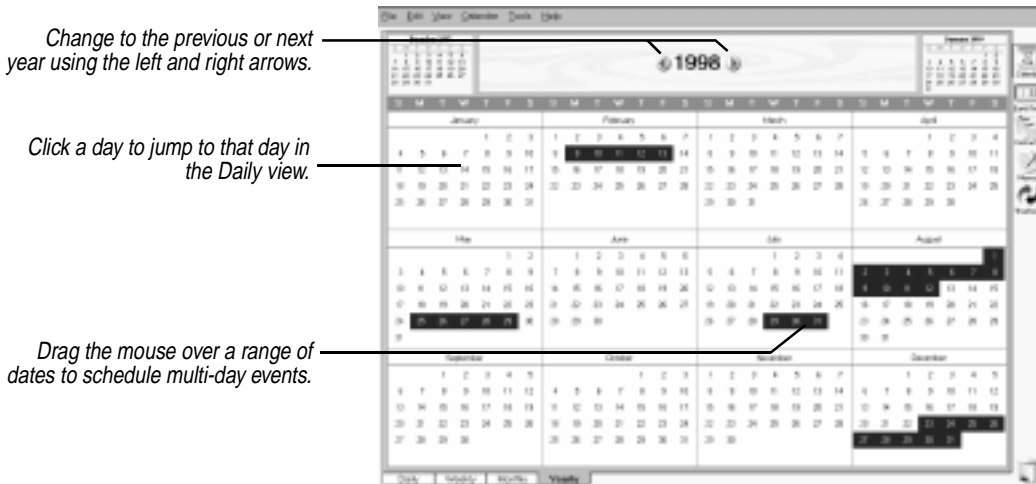
Change to the Weekly or Monthly view in the Calendar by clicking their view tabs or by choosing View | Weekly View or View | Monthly View.



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## The Yearly View

The Yearly view displays only multi-day events, such as vacations and conferences. Change to the Yearly view by clicking its view tab.



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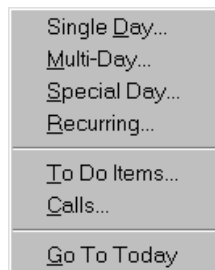
## Entering activities from different views

To schedule daily events from the Weekly, Monthly and Yearly views

- ◆ Choose Calendar | Events | Single Day. The Schedule An Event dialog box appears.
- ◆ Or choose Calendar | To Do items or Calendar | Calls and the appropriate dialog box appears.

To schedule an activity from the Weekly and Monthly views

Right-click the day on which the event will occur or start, and choose an option from the shortcut menu.



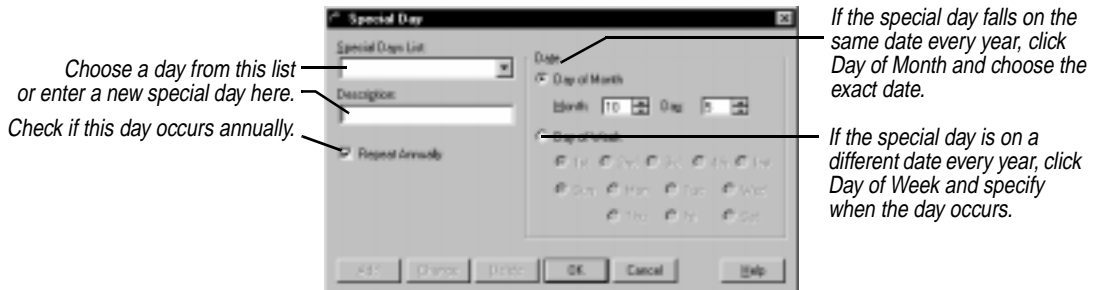
Each option opens its corresponding dialog box except the Go To Today option, which displays today's calendar in the Daily view. Special days and multi-day events are discussed in the following sections.

## Adding special days

Special occasions, like birthdays, anniversaries, or other events that you want to be reminded of, can be added to the Calendar as special days. Special days appear at the top of the Events pane in the Daily view.

### To add a special day

**1** In the Daily view, click the Special Day icon in the Toolbar, or choose Calendar | Events | Special Day. The Special Day dialog box appears.



**2** Enter a name of the special day into the Description text box, or choose a predefined special day from the Special Days list.

**3** Select the type of special day.

**Day of Month** is the month and day on which the special day occurs, such as February 20.

**Day of Week** is the week of the month and the day of the week that the special day occurs.

**4** Click Add to place the event in the Special Days list.

Continue to add other special days following the same steps. All the special days are listed in the Special Days list.

### To change the settings for a special day

Select the day in the Special Day list, make the changes, then click Change to save the changes.

### To delete a special day

Select it from the Special Day list and click Delete.

---

## *Scheduling multi-day events*

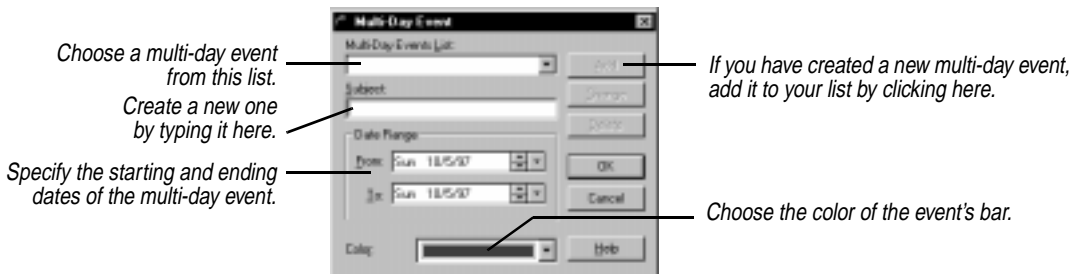
You can schedule multi-day events such as conferences, all-day meetings, or vacations. Multi-day events can be of any duration (even one day).

A multi-day event appears at the top of the daily Events pane. In the Weekly, Monthly, and Yearly views, the multi-day event appears as a bar extending from the starting date to the ending date. In the Weekly and Monthly views, the description also appears on the bar.

Up to four overlapping multi-day events can be displayed at one time in the monthly view.

### **To create a multi-day event**

**1** Choose Calendar | Events | Multi-Day or, in the Weekly or Monthly views, right-click in the day the event begins and select Multi-Day. The Multi-Day Event dialog box appears.



**2** Type the name of the multi-day event in the Subject text box.

**3** Select the month, day, and year for the starting and ending dates of the event.

**4** Select a color for the event's bar.

**5** Click Add to add the event to your calendar and place the event in the Multi-day Events list.

### **To reschedule a multi-day event**

Select the event from the Multi-day Events list and change the settings for the starting and ending dates. Click Change to save the changes.

### **To delete a multi-day event**

Select it from the list and click Delete.

## To schedule multi-day events quickly from the Yearly view

- 1 Place the pointer on the date your event begins. Hold down the mouse button and drag to the ending date.
- 2 Release the mouse button. The Multi-Day Event dialog box appears.
- 3 Enter a description, choose a bar color for the multi-day event, and click Add.

---

## Searching the Calendar

It is easy to find specific activities in your Calendar by searching for text in the Subjects or Notes.

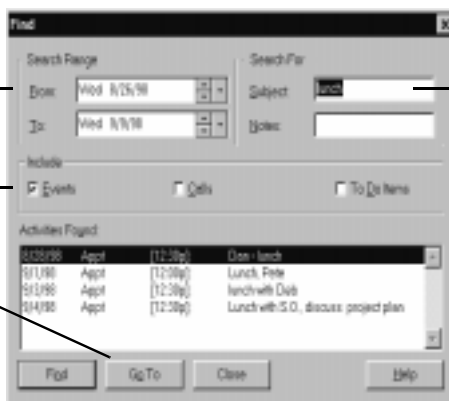
### To search for calendar items

From the Daily view, Choose Edit | Find, click the Find (binoculars) icon on the Toolbar, or type *Ctrl+F*. The Find dialog box appears.

Select the range of dates to search in the Calendar. The minimum time period is one day.

Select the activity lists to include in the search.

Select one of the found activities and click Go To to jump directly to that event. Choose Find, or click the Find button, to return to this list.



Enter the text for the subject or notes to find. If you enter text in both fields, only those entries that meet both criteria are found.

Special day and Multi-day events are not included in the search.

When ready, click Find to search the Calendar. All activities that match the search criteria are listed in the Activities Found box. Note that Special day and Multi-day events are not included in the search. Double-click an activity in the list, or select an item and click the Go To button to display it in the Daily view.

---

## Working with Calendar files

A single TrueSync Desktop Calendar is composed of as many as nine separate files. TrueSync Desktop uses part of the calendar name to differentiate the different files. When working with TrueSync Desktop calendar files, it is best to use the menu commands rather than the Windows Explorer, or other editor programs. For example, to copy a calendar, open it, choose File | Save Calendar As, and rename

the calendar, instead of using Windows to copy and rename each of the separate calendar files.

## *Using multiple calendars*

You can create multiple calendars to keep different kinds of calendar information, although only one calendar can be open at a time. You might keep one calendar for yourself and one for your manager, for example, or you might want separate calendars for your business and personal use.

If you need multiple calendars, you can open and save them just like any other files.

**CAUTION** TrueSync Desktop calendar files should not be shared in a network environment. Attempting to share them by storing them on a network drive and letting more than one user simultaneously access them could result in loss of information.

Use the commands listed in the following table to work with multiple calendars.

| Task                    | Command   |
|-------------------------|---|
| Opening a Calendar      | Choose File   Open Calendar and select the appropriate calendar name.   |
| Creating a new Calendar | Choose File   New Calendar. Begin entering data.  |
| Saving a Calendar       | Choose File   Save Calendar. Or, save changes to a new Calendar file by choosing File   Save As, and entering a new Calendar file name. |
| Importing a calendar    | Choose File   Import Calendar. Select the format you want from the list.  |

## *Deleting activities*

You can free up space in your Calendar files for new entries or delete information that is no longer needed. The activities that fall within a range of dates you set are deleted.

### **To delete activities**

- 1** From the Daily view, choose Calendar | Delete. The Delete Activities dialog box appears.
- 2** Select the types of activities you want to delete. You can delete Events, Calls, or To Do items.

- 3 Select the range of dates in the calendar from which you want to delete all activities from the lists selected. One day is the minimum time period allowed.

**CAUTION** Before you proceed, check that all settings are correct and save your calendar. There is no undo option.

- 4 Click OK to delete the activities you specified.

---

## *Importing Calendar information*

TrueSync Desktop can import calendar files from Microsoft Outlook, Microsoft Schedule+, ACT!, and Lotus Organizer. To find out which versions of these products are supported, see “Supported desktop applications” on page 3. After you import a calendar file, you can synchronize it between TrueSync Desktop and your device.

**NOTE** If you install TrueSync Plus for REX, you can synchronize information directly among supported desktop applications and services, TrueSync Desktop, and your device, without having to import (copy) data.

When you import a calendar file, TrueSync Desktop normally merges that file with any currently open calendar files, which can create duplicate calendar entries. To prevent creating duplicate calendar entries, create a new calendar and save it before you import to it, following the steps below.

Remember to synchronize the new calendar with your device to update it with the most recent data.

### **To import files into the Calendar view**

- 1 From the Calendar view, choose File | New Calendar.
- 2 Choose File | Save Calendar As.
- 3 Type a calendar file name (for example, your name or initials) and then click OK.
- 4 If you typed a previously used calendar file name, “User name already exists. Replace the existing name?” appears. Click Yes to overwrite the previous calendar file.
- 5 Choose File | Import Calendar, then choose a calendar format.
- 6 If you chose Schedule+, Lotus Organizer, or ACT!, choose a file to import, and then click Open.



Note that some types of calendar events from other organizers cannot be imported. Some examples include events that recur monthly more than one day a week or more than one week a month, recurring calls or To Do items, and recurring all-day events.

**NOTE** If there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see “The Readme file” on page 10.

## *Viewing Sidekick calendars*

You can directly open calendars from previous versions of TrueSync Desktop and Sidekick using TrueSync Desktop 2.0.

### **To view Sidekick calendars**

Choose File | Open Calendar and navigate to the Sidekick Userdata directory. Then choose the calendar file and click OK.

**NOTE** You can open files from Sidekick version 2.0 and higher, TrueSync Information Manager, and earlier versions of TrueSync Desktop from within TrueSync Desktop 2.0. However, when you open these files, they are permanently converted to TrueSync Desktop format. Therefore it is recommended that you back up your earlier version calendar files before opening them in TrueSync Desktop 2.0. Sidekick 99 files are interchangeable with TrueSync Desktop 2.0 files.



# *The Contacts view*

The Contacts view lets you store, manage, and retrieve personal information stored in cardfiles. Each cardfile can contain full address information and numerous other details about your contacts.

Once you have updated your cardfiles, you can use the TrueSync view to transfer them to your device.



To open the Contacts view, click its Deskpads icon, choose View | Contacts, or press *F5*.

This chapter explains how to

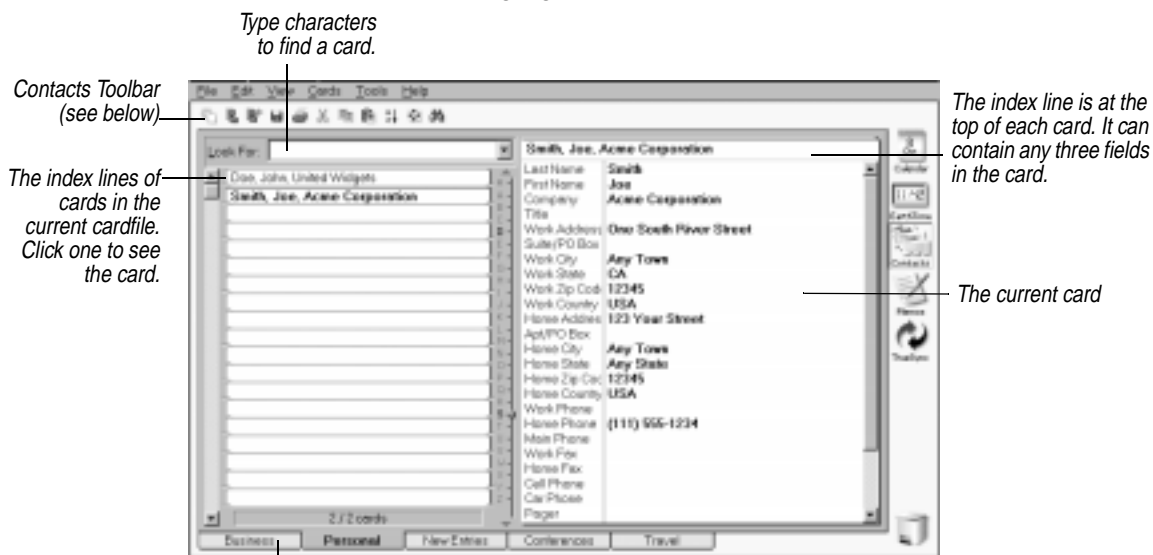
- ◆ Create a cardfile
- ◆ Work with multiple cards and cardfiles
- ◆ Search for and extract information from a cardfile

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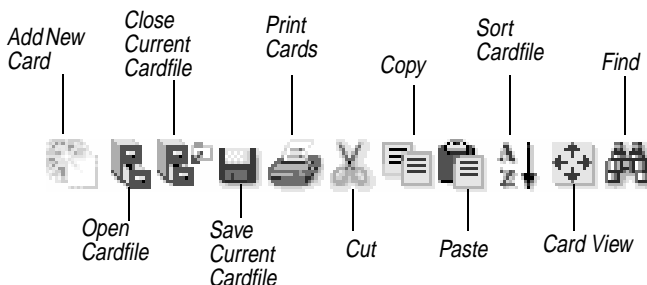
## *Cardfile basics*

In the left pane of the Contacts view is the card list, your visual index to the cards in the *active cardfile*—the cardfile whose tab is selected. In the right pane is the *current card* in the cardfile. You can review and edit the information in the current card directly.

The following figure shows the Contacts view.



Click a cardfile's tab to change to another cardfile.



Here are some of the key concepts of cardfiles:

- ◆ The cardfile contains customizable fields that you can use to organize the information on the cards. Each cardfile can have up to 30,000 cards.
- ◆ A cardfile consists of fields. Each card can have up to 100 fields.
- ◆ At the top of each card is the index line, which can contain any three fields in the card. Cards are sorted alphabetically, in ascending (A–Z) or descending (Z–A) order by their indexes. You can specify which fields appear in the index.
- ◆ The field names describe the contents of each field. A field name can be up to 39 characters in length.

- ◆ Each card can contain a maximum of 4800 characters.
- ◆ Carriage returns are only allowed in the last field of the cardfile.

On the bottom of the screen are tabs indicating which cardfiles are currently open. The tab that appears to be on top of the others is the active cardfile.

---

## *Opening, closing, and saving cardfiles*

You can choose File | Open Cardfile to open as many cardfiles as you like. Each open cardfile appears as a tab at the bottom of the screen. If there is not enough space for all the cardfile tabs, TrueSync Desktop displays scroll buttons you can click to bring additional tabs into view.

### **To go directly to any cardfile**

Click its tab.

### **To reorder the cardfile tabs**

Press *F11*. In the Reorder Cardfile Tabs dialog box, move cardfiles up or down in the list to create the order you want.

### **To save a cardfile**

Choose File | Save Cardfile. Choose File | Save Cardfile As to save the file under a different name or to save in a different format.

### **To close cardfiles**

Choose File | Close Cardfile to close the current cardfile. To close several cardfiles at once, choose File | Close Cardfiles and select the files you want to close in the dialog box; use *Shift+click* or *Ctrl+click* to select multiple files.

**NOTE** If you close all of the cardfiles, an empty, untitled cardfile will be the current cardfile.

---

## *Creating a cardfile*

When you create a cardfile, first decide what fields you want on each card. You can create all these fields yourself, or you can use a *template*—an empty cardfile that already has fields in place. If you select a template, you can customize it, keeping some or all of its fields and adding your own. If you are creating a cardfile based on an imported file with its own fields, see “Importing and exporting cardfile information” on page 61.

## To create a new cardfile

Choose File | New Cardfile. Choose the template you want from the list that appears, as shown below, if needed.

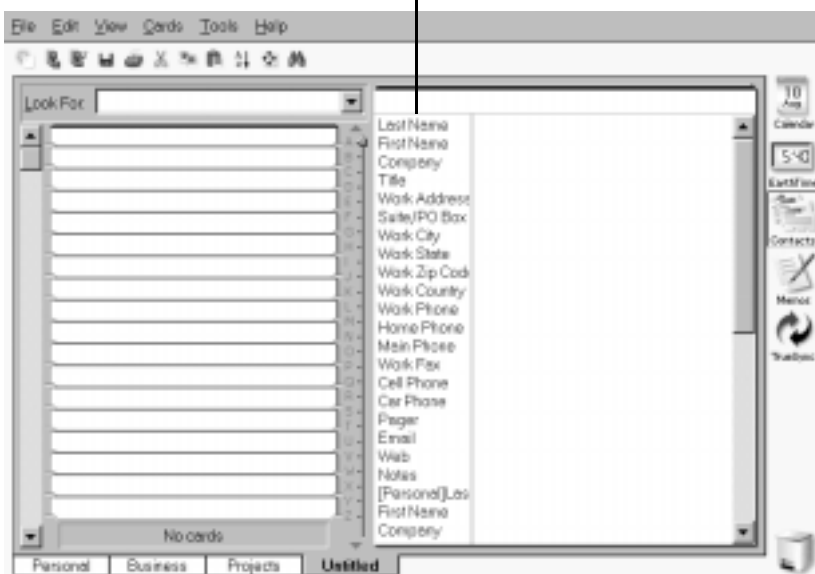
**NOTE:** If no cardfiles are open, use Cards | Define Fields to open this dialog box.



Click the arrow and choose possible templates one-by-one from the list.

You can see the predefined fields for each template. When you find the best template for your needs, click OK. If you want to define all your own fields, choose None from the list.

The new cardfile contains the field names from the template, but no information until you add cards.



You can use any of the cardfile templates provided with TrueSync Desktop. If you want to customize a cardfile, you may find it easier to edit the provided field names of a cardfile template rather than to create all of the field names yourself.

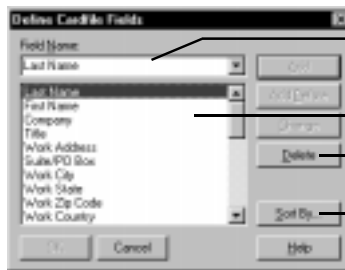
If you want to define fields or change any fields after creating the cardfile, see the next section, “Adding and changing cardfile fields.” If you are ready to begin entering information into your new cardfile, see “Adding cards” on page 51. For another way to create new cardfiles from existing cardfiles, see “Extracting cards” on page 58.

## Adding and changing cardfile fields

The Define Cardfile Fields dialog box is where you create new fields for a new cardfile, edit existing fields that were provided by a template, or change field names. If you do not select a template, when creating a new cardfile, the Define Cardfile Fields dialog box will automatically appear.

### To add or modify cardfile fields

Choose Cards | Define Fields. The Define Cardfile Fields dialog box opens.



To add a field, type a name in the Field Name box. Then click Add, or click an existing field and click Add Before.

To change a field name, first select it from the list. Then type the new name and click Change.

To delete a field, select it from the list and click Delete.

Click Sort By to set which fields to sort the cardfile by.

When you have defined the fields, click OK to save the changes you made and update the cards in the cardfile.

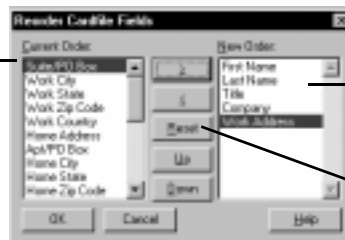
**CAUTION** Be careful when deleting a field; deleting removes the field itself and any data contained in that field on every card. Be sure to save your data. There is no Undo when you delete a field.

## Reordering fields

### To change the order of the fields in a cardfile

Choose Cards | Reorder Fields to open the Reorder Cardfile Fields dialog box.

Double click fields in the order you want them, or click each and then click the  $\geq$  button.



To rearrange fields, click a field and then click Up or Down to move it within the list.

Click Reset to return to the original order of the fields.

**NOTE** Carriage returns are allowed only in the last field of a cardfile. If your data contains carriage returns and you change the order of the fields so the cardfile has a new last field, any characters after a carriage return remain at the end of the card.

## *Default field data*

When you add a new card, you can have a default value in any field that appears automatically when you create a new card. For example, you can have TrueSync Desktop automatically enter USA in the Country field for every new card added to a file. You can change the information once it appears on a card, just like any other information you have entered.

**NOTE** If you already have cards in the cardfile, specifying this default text will not add it to them. It only adds the text to new cards you create after specifying the text.

### **To specify default data for a field**

Choose Cards | Define Fields. The Define Cardfile Fields dialog box appears.



Select the field and type a colon (:) followed by the default information you want. In this example, "USA" will appear in the Country field of new records. (You can change it for non-US addresses by typing over it.)

## *Using numbers in fields*

Cardfile fields are text fields, not numeric fields. This means that when you enter numbers, you should use leading zeroes if you want the number to be sorted correctly. For instance, if you enter the numbers from one to twenty into fields, TrueSync Desktop sorts them as 1, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 2, 20, 3, 4, 5, 6, 7, 8, 9

If you use leading zeroes, they would sort properly:  
01, 02, 03, 04, and so on.

If you want to use numeric dates in an index line for sorting, you should enter them in year/month/date format, such as 96/10/14 or 96-10-14.



---

## *Adding cards*



### **To add a card to the cardfile**

Choose Cards | Add, or click the Add New Card button on the Toolbar. The Add Card dialog box appears with a list of the fields that are set up in the cardfile.

Type the information for each field in the list. To move from one field to the next, use the up and down arrow keys or the Tab key.

Click Add to insert the card in the cardfile. You can then begin entering information for another new card, or click Close.

## *Duplicating cards*

Sometimes it is useful to make several copies of one card, and then customize the information as needed. For example, if you are entering information for several people who work at the same company, you can duplicate the shared company information, and then add the individual name and phone information for each person.

### **To duplicate the current card**

Choose Cards | Duplicate. Type the number of copies to make and choose OK.

---

## *Editing and viewing cards*

Once a card has been added to the cardfile, view its contents by clicking its index line, as shown in the figure on page 52. You can change or add information by typing directly on the card.

### **To edit a card**

- 1 Select the card by clicking its index line.
- 2 Click in the field you want to edit. Type new information or make whatever changes you want.

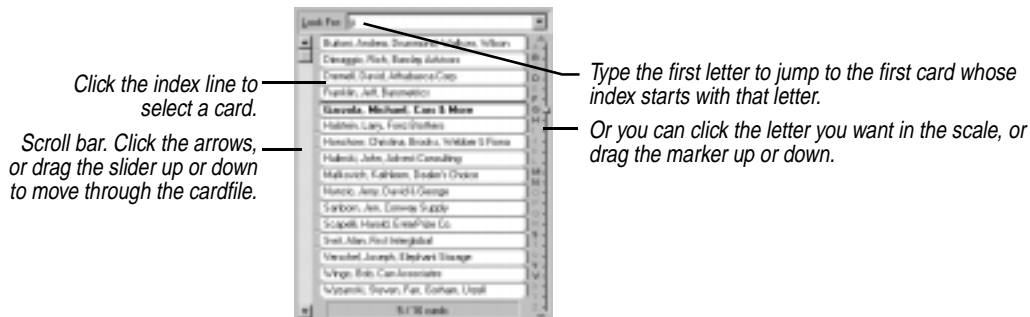
## *Navigating through the cardfile*

If you have a large cardfile, there are several ways to navigate through it quickly to find the card you want.

## To navigate quickly through large cardfiles

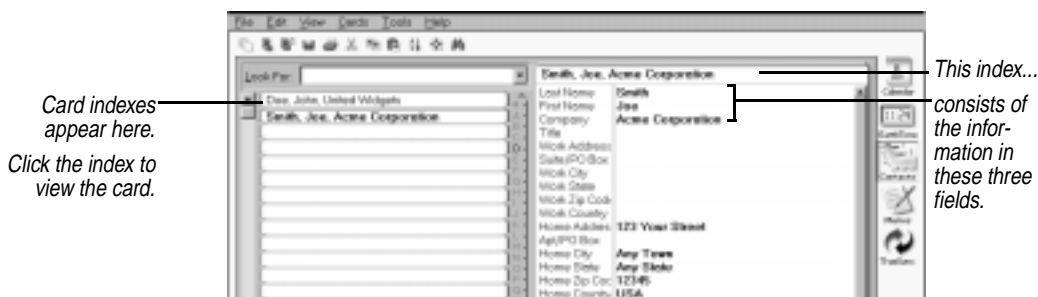
Type the first letters in the Look For box. The cursor jumps to the first card whose index starts with that letter or group of letters. See “Quick searches” on page 55.

The navigation aids are shown in the following figure:



## Sorting the cardfile by index

Every card has an index, or title line, with up to three fields. For example, you could use Last Name, First Name and Company fields for an index, as shown in the following figure.



TrueSync Desktop sorts the cards alphabetically (or reverse alphabetically, if you choose) according to its index. If you choose Last Name, First Name, and Company for the index line, the cards are arranged alphabetically by last name, then first name, and then company name.

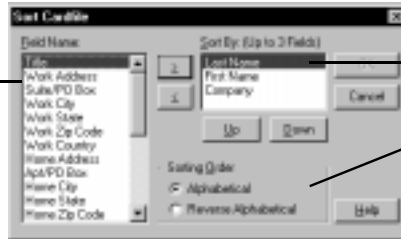
In addition to determining the sort order, the index determines what appears at the left side of the screen. If you want to be able to see a telephone number for each card at the left side of the window, be sure to include the telephone field in the index.

## To define the index



Choose Cards | Sort or click the Sort Cardfile button on the Contacts Toolbar. The Sort Cardfile dialog box appears.

1 Select up to three fields one-by-one and click  $\geq$  to move them to the Sort By list.



2 You can change field order by clicking one and using the Up and Down buttons to move it.

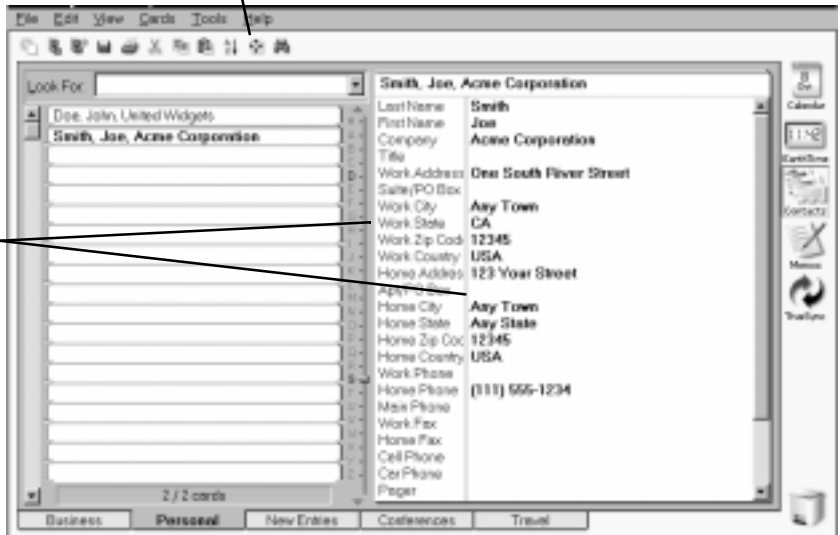
3 Choose the sorting order (Alphabetical or Reverse Alphabetical) for the card list.

## Changing the view

There are several options for changing the way your information appears in the Contacts view, as shown in the following figure.

Click to change between Index view (shown) and Card view (full screen, one card at a time).

Drag these borders to adjust viewing areas.



## Resetting fonts

You can also change the fonts for various parts of the Contacts view. Right-click a text area, and choose Font.

## Selecting and working with multiple cards

In addition to editing the information in the fields on a card, you can perform various actions—like deleting—on the card itself. You can even perform these actions on several cards at once, after you select them.

**To select multiple cards, do either of the following:**

- ◆ Click a card's index line in the card list, and then press *Shift* and click another card's index. The two cards and all cards between them are selected.
- ◆ Alternatively, press *Ctrl* and click several cards' indexes in the card list. Only those cards you *Ctrl*-click are selected.

You can perform many functions on multiple cards:

- ◆ Deleting
- ◆ Printing (see Chapter 8)
- ◆ Copying or moving cards from one cardfile to another (see "Moving cards between cardfiles" on page 59)
- ◆ Merging cards with memos (see "Personalizing memos" on page 78)
- ◆ Extracting (see "Extracting cards" on page 58)

## ***Marking cards***

Marking cards gives you another way to specify a group of cards for certain functions. Marked cards are distinguished by a red triangle on the left side of their indexes.

**To mark the current card**

Choose Cards | Mark Current Card, or press *Ctrl+K*, or right-click the card's index line in the card list.

**To unmark a card**

Choose Cards | Unmark Current Card, or press *Ctrl+K* again, or right-click the index.

**To unmark all marked cards in a cardfile**

Choose Cards | Unmark All.

## ***Deleting cards***

**To delete cards**

Select each card in the card list and drag it to the Delete icon. Or choose Cards | Delete to open a dialog box where you can choose to delete the current card, selected cards, marked cards, cards with blank indexes, or an index range.

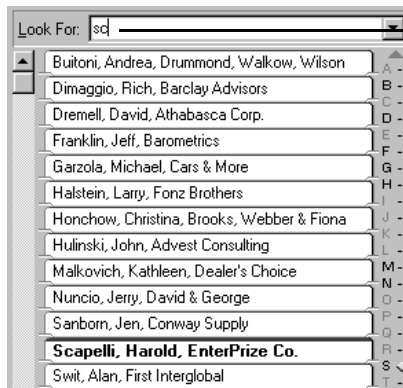
## Searching for cardfile information

TrueSync Desktop has several powerful tools for finding information in a cardfile. You can search for simple text strings, such as names, cities, numbers, and so on, or specify conditions to search for in particular fields of a cardfile. TrueSync Desktop displays the first card matching the search criteria as the current card.

### Quick searches

You can search the Card list for text contained in the index lines of each card. As you type text into the Look For box, TrueSync Desktop displays the first card whose index begins with the characters you are typing.

In the following example, typing “S” takes you to the first record whose index begins with the letter “S”. Adding a second letter to make “SC” takes you to the first record whose index begins with “SC”.



When you type “sc” in the Look For box, TrueSync Desktop moves immediately to the first record whose index begins with “SC”.

If you press Enter after typing “sc”, TrueSync Desktop displays the first 20 records that contain “sc” anywhere in their index (to see this drop-down list, click the down arrow button to the right of the Look For box).



### Searching for text within a card

You are not limited to searching card indexes. You can search all information in the active cardfile for any text string. It can be any letter, number, word, or combination of letters, numbers, or multiple words. For example, you can find the card for the person whose company name you remember but whose name you have forgotten, or you can find all cards with the same city entry.

## To search for a text string in a cardfile

Choose Edit | Find | Text, click the Find button on the Contacts Toolbar, or press *Ctrl+F*. The Find Text dialog box appears.

Type the text you want to find. You can search for complete and partial text matches, dates, or combinations of numbers.



Select the part of the cardfile to search for the text.

Click Find to begin the search. TrueSync Desktop locates the first matching card.

Choose Edit | Find Next or press *F3* to continue the search and go to the next match. Choose Edit | Find Previous or press *Shift+F3* to move to the previous match.

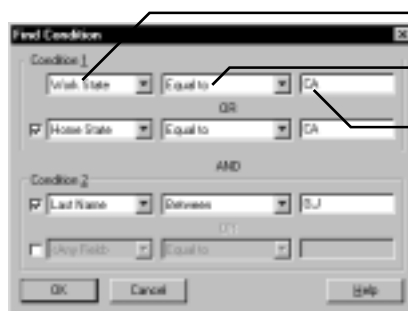
## Finding specific conditions

You can search the active cardfile for specific conditions. For example:

- ◆ You might want to find cards that show rates of more than \$50 but less than \$100.
- ◆ You might want to review records of customers living in either Texas or California.
- ◆ You might want to find people you have identified as attorneys or accountants in your address list.

## To perform a conditional search

Choose Edit | Find | Condition. The Find Condition dialog box appears.



1 Select the first field to search in Condition 1.

2 Select the operator you want from the operator list.

3 Type the value you want to find in the selected field.

For additional conditions, check the appropriate condition's check box and repeat Steps 1 through 3. See "Specifying operators" for an explanation of operators.

When you have specified all the conditions you want, choose OK. The first card in the active cardfile meeting the specified conditions appears.

Choose Edit | Find Next or press *F3* to continue the search and go to the next match. Choose Edit | Find Previous or press *Shift+F3* to move to the previous match.

### *Specifying operators*

When searching for conditions on cards, the contents of the fields are compared to values you specify. The comparison is done with a condition. A condition is an equation consisting of a field name, an operator, and a value.

For example, a simple equation might be State equal to TX. As TrueSync Desktop searches the active cardfile, it compares information on each card with the equation. If the equation is true—when the State field on a card equals TX—the card meets the condition.

Conditional operators can be used with letters or numbers. For example, finding a card with a name greater than Baker would find the first name alphabetized after Baker, such as Bridges.

| Field name  | Operator                 | Sample value  | Search result   |
|-------------|--------------------------|---------------|---|
| City        | Equal to                 | San Jose      | Any card with San Jose in the City field.                                     |
| Country     | Not Equal to             | United States | Any card that does not have United States in the Country field.               |
| Income      | Greater than             | 10000         | Any card with a number greater than 10000 in the Income field.                |
| Age         | Greater than or Equal to | 18            | All cards with the number 18 or higher in the Age field.                      |
| Investments | Less than                | 500           | Any card with a number smaller than 500 in the Investments field.             |
| Price       | Less than or Equal to    | 49.95         | Any card with the number 49.95 or lower in the Price field.                   |
| Last_Name   | Between (range)          | Bas,Smi       | Any card with a last name entry that begins with the letters Bas through Smi. |
| Zip         | Outside of (range)       | 91000,95000   | Any card with a Zip code that is less than 91000 or greater than 95000.       |

### *Specifying conditions*

Keep these tips in mind when specifying conditions:

- ◆ Do not use commas in numbers. They are reserved for ranges. To enter a number like ten thousand, type 10000, not 10,000.
- ◆ When entering a range with the Between operator, separate the high and low ends of the range with a comma. For example, to indicate the range of years from 1990 to 1997, type 1990,1997. To indicate the range of words from smi to tru, type smi,tru. Searches are not case sensitive.
- ◆ Do not use quotation marks around words unless the information in your fields have quotation marks as well.
- ◆ Use <Any Field> to search all fields for text. For example, <Any Field> Equal to SMITH searches for the cards in the cardfile that contain Smith regardless of the field it's in. <Any Field> works only with the Equal To or Not Equal operators.

---

## ***Extracting cards***

Extracting cards is a way of searching for cards and automatically copying them into a new, untitled cardfile. All the types of searches described previously can be the basis for extracting cards into a new file.

### ***Extracting on index range***

#### **To copy a range of cards to a new cardfile**

- 1** Be sure the field you want to use for the range is the first field in the index. If necessary, click the Sort Cardfile button and change the index.
- 2** Choose Tools | Extract Cards | On Index Range.
- 3** Type the letters you want to begin the range in the From text box, and the letters to end the range in the To text box.
- 4** Choose OK.

A new cardfile appears containing copies of only those cards from the original cardfile that were found within the alphabetical range specified.

### ***Extracting on text***

#### **To copy all the cards in a cardfile that contain a specified text string to a new cardfile**

Choose Tools | Extract Cards | On Text. The Extract On Text dialog box appears. Type the text you want to find and choose the part of the cardfile you want to search.



When the search is complete, a new, untitled cardfile appears containing copies of only those cards from the original cardfile that were found with the specified text string.

## ***Extracting on condition***

Extracting cards on condition is just like searching a cardfile for specific conditions. The only difference is that instead of merely jumping to the first card matching your condition, the Extract Cards On Condition function creates a new cardfile containing *all* the cards matching your conditions.

### **To copy any cards in a cardfile that meet certain conditions to a new cardfile**

Choose Tools | Extract Cards | On Condition. The Extract Cards On Condition dialog box is similar to the Find Condition dialog box discussed on page 56. When the search is complete, a new cardfile appears containing copies of only those cards from the original cardfile that meet the specified conditions.

---

## ***Moving cards between cardfiles***

You can move a group of selected cards between cardfiles by dragging them. (See “Drag and drop” on page 17.) Dragging a group of cards onto another cardfile’s tab moves those cards into the other cardfile. If you want to copy cards instead of moving them, press and hold *Ctrl* while dragging and dropping them.

When you move cards between two cardfiles that use different field names, the Match Cardfile Fields dialog box appears. This dialog box lets you choose how to map the different fields from one cardfile to another.

*The cards are being moved from the file BUSINESS.SKCARD, which contains these fields.*

*Select a field from each file to match, and click the Match button.*

*Click to have TrueSync Desktop use these matches the next time it finds the same fields.*



*The cards are being moved to the file RHB3.SKCARD, which contains these fields.*

*Matched fields appear here.*

The Match Cardfile Fields dialog box automatically matches fields that share the same name in both cardfiles. You can match other fields manually, by selecting a field from each cardfile and clicking the Match button. You can remove an incorrect match by selecting it and

clicking the Remove button. To change the list of remembered matches, click Delete Match Fields.

The cards you dropped into the target cardfile now have that cardfile's fields. If you matched fields between the two cardfiles, information is moved accordingly. Information from unmatched fields will be placed in the last field of the new card.

---

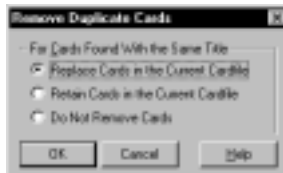
## *Merging two cardfiles*

You can merge information from one cardfile into another. For example, you might want to combine the addresses from your personal address cardfile with your business address cardfile to create a single address cardfile. When you merge cardfiles, TrueSync Desktop adds the fields and the information from one cardfile into another.

**CAUTION** There is no undo option for merges. When you merge cardfiles, the cardfile you add information to changes to accommodate the information and fields being merged. If you want to keep a copy of the original cardfile, save the merged cardfile to a different name. Of course, you can always discard the merge result by closing the cardfile without saving.

### **To merge two cardfiles**

- 1** Open the cardfile you want to add cards to. If the cardfile is already open, click its tab to select it.
- 2** Choose Tools | Merge Cardfile. The Merge Cardfile dialog box appears.
- 3** Select the cardfile you want to merge into the open cardfile, and click Open.
- 4** The Remove Duplicate Cards dialog box appears.



Choose how to handle cards that have the same index line.

- ◆ **Replace Cards** replaces the cards in the currently open cardfile with the cards from the second cardfile.

- ◆ **Retain Cards** retains the cards in the currently open cardfile and ignores the cards in the second cardfile.
- ◆ **Do Not Remove Cards** keeps all cards, including any duplicates.

**5** If the fields in the currently open cardfile are different from the fields in the second cardfile, the Match Cardfile Fields dialog box appears (see page 59). Specify any matches you want between fields by selecting a field from each cardfile and clicking the Match button. Click OK when done.

The merge combines all of the information from the two cardfiles into the open cardfile.

**NOTE** A cardfile is limited to 100 field names and 30,000 total cards. If the number of cards resulting from a merge would be greater than 30,000, you will see a message, and the merge will not occur.

---

## *Importing and exporting cardfile information*

You can import and export cardfile information to and from other organizer and database applications. TrueSync Desktop 2.0 uses the same Contact file format as TrueSync Information Manager, Sidekick 99, Sidekick 98, Sidekick 97, and Internet Sidekick. You can open these files in TrueSync Desktop 2.0 without importing them. Note that Contact Log information is not available for viewing in TrueSync Desktop.

**NOTE** You can open Sidekick version 2.0 and higher, TrueSync Information Manager, and earlier TrueSync Desktop files from within TrueSync Desktop 2.0. However, when you open these files, they are permanently converted to TrueSync Desktop 2.0 format. Therefore it is recommended that you back up your earlier files before opening them in TrueSync Desktop 2.0. Sidekick 99 files are interchangeable with TrueSync Desktop 2.0 files.

**NOTE** If there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see “The Readme file” on page 10.

## ***Importing cardfiles***

When you import information from other applications, TrueSync Desktop converts the information to the TrueSync Desktop 2.0 cardfile format.

You can use the Import Wizard to import files in various formats, including Outlook, Schedule+, ACT!, Organizer, ASCII tab-delimited, comma-delimited, dBASE III and IV, and Spreadsheet DIF files. For specific application versions supported, see “Supported desktop applications” on page 3.

**NOTE** If you install TrueSync Plus for REX, you can synchronize information directly among supported desktop applications and services, TrueSync Desktop, and your device, without having to import data.

Since the TrueSync Desktop cardfile is a text-only database, special fields found in other file formats for dates, numbers, labels, etc., are converted to standard text fields when imported. Some formatting for these special fields may not be retained in the resulting cardfile.

**NOTE** If you use Ecco Pro, Goldmine, Day-Timer, or any other organizer not mentioned above, you can still import information by saving your files as any of the supported formats. For example, Ecco Pro can export files as comma-separated values.

### **To import text information into a cardfile**

**1** Choose File | Import Cardfile.

The Contacts Import Wizard dialog box appears.

**2** Click the Next button to go to the Select File to Import Screen.

**3** If you have Outlook and want to import information from it, click Import from Outlook 97/98. Otherwise, click Import from Other File and enter the name of the file you want to import.

Or, click the Browse button and select a file. Choose the file type you want to import from the Files of Type drop-down list and then click the Open button.

**4** Click the Next button.

**5** From the Select Target File dialog box, type the desired name of the target file and click the Next button.

**6** Select the fields for the new TrueSync Desktop file.

Select a field and click Add, or choose Add All to select every field. You can click Remove to remove a field from the Fields to Import list. You can also click Remove All to start the selection process over again.

Note that if no fields are available, you might need to open the file in another application, such as a text editor, and add the field names you want to use in the cardfile before continuing with the import.

**7** Click the Finish button when done.

Once you have imported a cardfile, it opens automatically. You may want to sort the cards to rearrange the way information appears on the screen by choosing Cards | Sort.

**NOTE** If you do not see the expected result, check that you imported the cardfile from the correct location and that the file from which you imported data contains valid information.

## *Exporting cardfiles*

When you export information from a cardfile to another application, TrueSync Desktop converts it to the appropriate file format.

### **To export a cardfile**

**1** Choose File | Export Cardfile.

The Contacts Export Wizard opens.

**2** Click the Next button.

**3** Type the complete name (including the file extension) of the cardfile that you want to export. Or, click the Browse button to search for the desired file name.

**4** Click the Next button.

**5** At the Select Target File dialog box, select the name for the Target File and click the pull-down menu to select the Target File Type.

If you select a different file type, the extension of the target file will change automatically.

**6** Click the Next button.

**7** In the Select Fields to Export dialog box, select the fields in the cardfile that you wish to export by selecting them from the left

column and then clicking Add. To export the entire cardfile, click Add All.

**8** Click the Finish button.

**NOTE** For more information on the maximum values supported when importing and exporting cardfiles (for example, the maximum number of characters per field), double-click the “Importing and Exporting Files” chapter in the online help Table of Contents, and see “Importing and Exporting: Maximum Values.”

# *The Memos view*

The Memos view lets you create memos, organize them in folders, and save them as memo files. You can apply formatting to your memos, and you can even create memos to merge with names from a cardfile.

In addition, using the TrueSync view, you can transfer your memos to your device for reading and reference anywhere. You can even import memo and text files from other PC organizer programs into TrueSync Desktop and then synchronize them to your device. For further information on import capabilities, refer to Starfish's Import Matrix at [www.starfish.com](http://www.starfish.com).



Memos

To open the Memos view, click the Memos Desktop icon, press *F7*, or choose View | Memos.

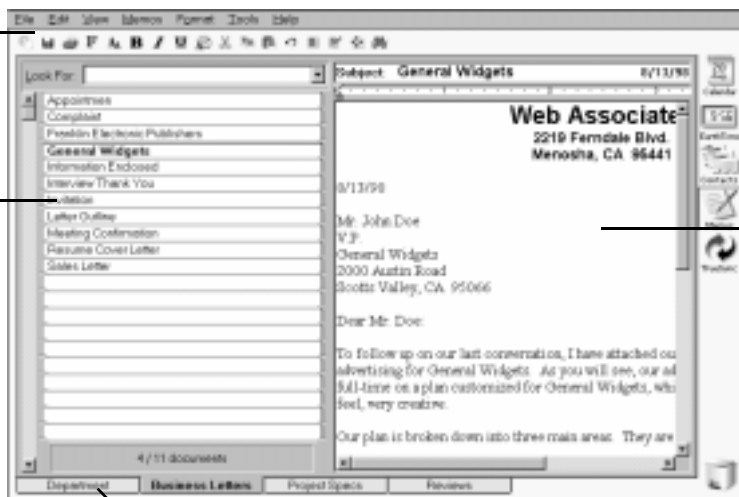
This chapter explains how to

- ◆ Create and edit memos, and organize them in memo files and folders
- ◆ Use Memo templates provided with TrueSync Desktop
- ◆ Use Quick Letter and mail merge
- ◆ Import and export text and rich text format (RTF) files to and from the Memos view

The following figure shows the Memos view.

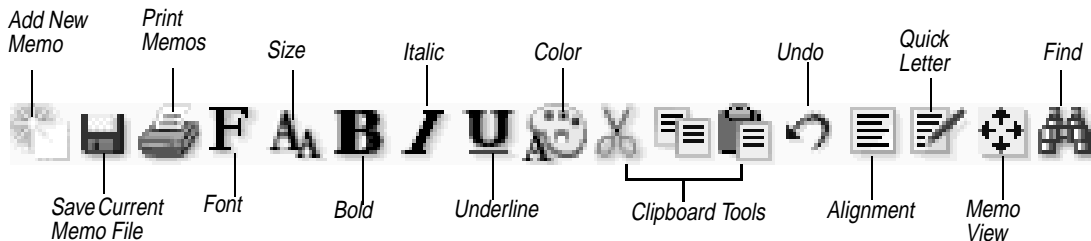
Memos Toolbar (see below)

The memos list displays the subject lines of all memos in the current folder.



The currently selected memo appears here.

Click the tab of the folder you want.



---

## ***Memo files, folders, and memos***

Memo files help you organize your memos by topic. A Memo file can contain many folders. Each folder contains one or more memos.

Each folder in a Memo file is identified by a tab at the bottom of the Memos screen. Using folders, you can organize memos according to projects, tasks, people, subject, or any other grouping.

---

## ***Creating memos***

**To create a memo**

**1** Click the tab of the folder where you want the memo.





- 2 Click the Add New Memo button or choose Memos | Memo | Add. A new, blank memo appears, with the insertion point in the subject line.
- 3 Type a subject, and then press *Enter* to move into the body of the memo. Type your text.

When you create a new memo, you type its subject line first.



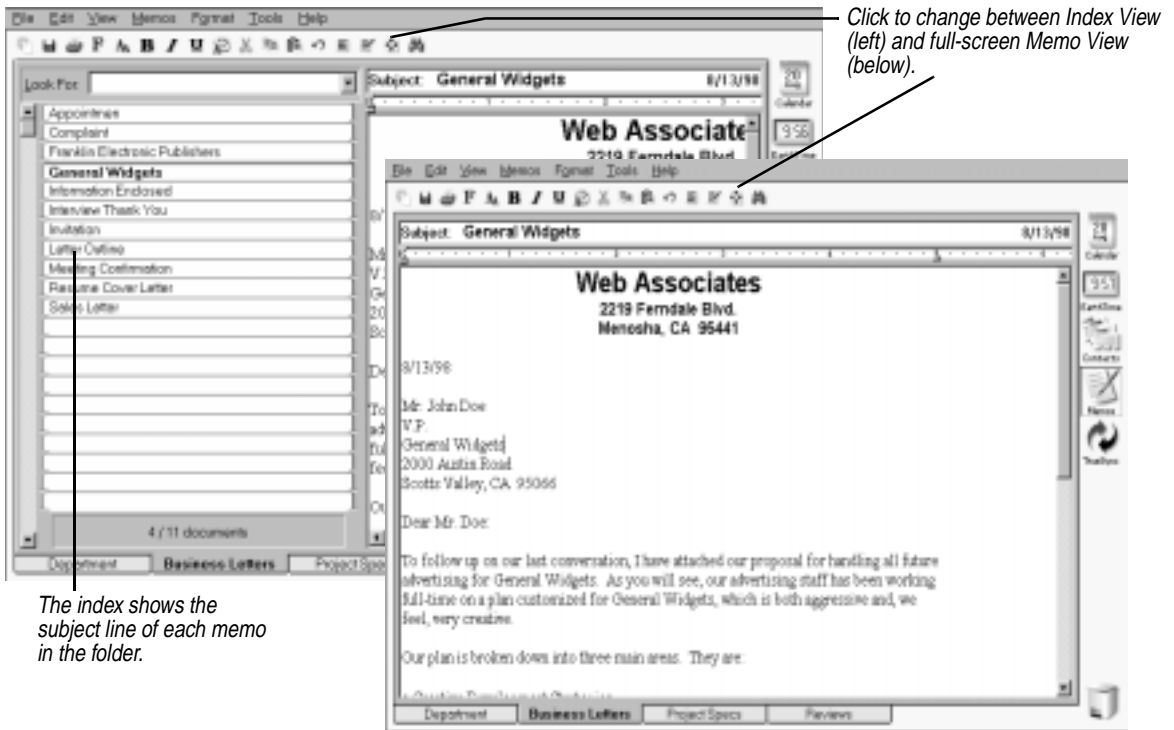
The date the memo was created appears here.

Type directly in the memo.

---

## Using full-screen editing

You can edit memos in a full-screen Memo View or in Index View. The Index View makes it easy to find a memo title. The full-screen view is easier when you have a lot of writing or formatting to do.



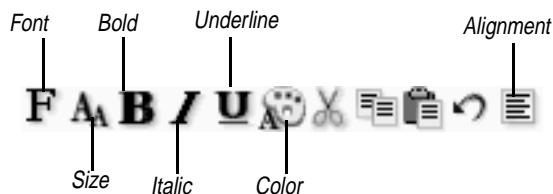
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## Fonts and formatting

The Memos Toolbar provides options for changing type size and style. You can also change paragraph alignment—left-aligned, centered, right-aligned. (To change the default font for new memos, use Tools | Preferences | Memos.)

### To change the type size or appearance

Highlight the text you want to change, and then click the formatting button you want.



### To change paragraph alignment

Click in the paragraph, or highlight the paragraph(s) you want to change. Then click the Alignment button, and select the desired paragraph alignment.

### To add a bullet to a paragraph

Click in the paragraph, or drag the mouse through several paragraphs. Then choose Format | Bullet.

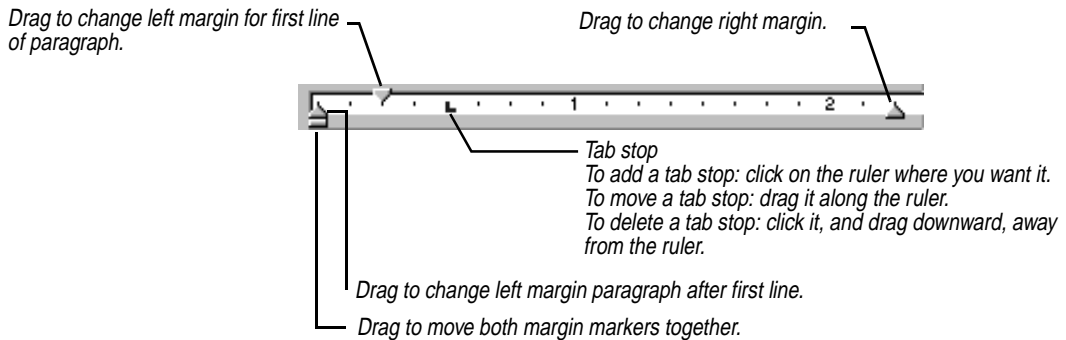
---

## *Changing margins and tabs*

Use the ruler when you want to change margins or set a tab stop. To change more than one paragraph, select the paragraphs before you adjust the ruler.

### To see the ruler

Choose View | Ruler.



If you create a new paragraph by pressing *Enter* at the end of an existing paragraph, the new paragraph retains the margins and tabs of the existing paragraph.

---

## *Finding text*

You can search through the memo indexes or the memos at the click of a button. You can search for text either using the Look For box or using the Find dialog box.

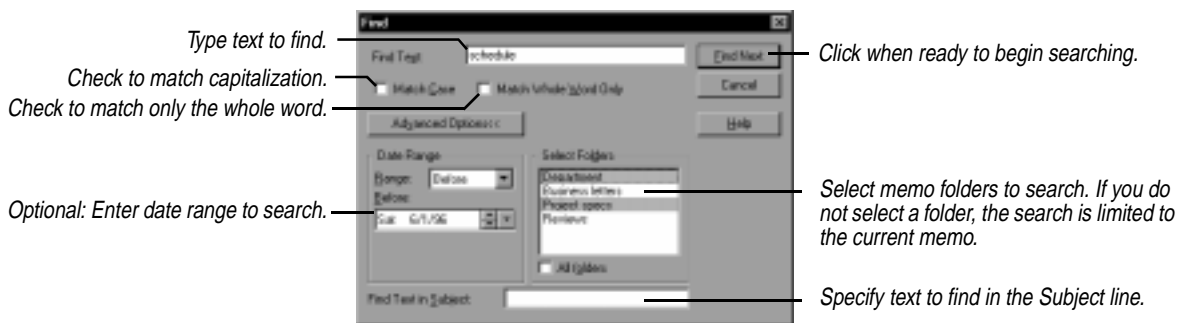
The Find dialog box gives you more flexibility in searching for text. It searches through the current memo, all memos in the current folder, or in all folders you specify in the current memo file.

**To find text in the memo indexes using the Look For box**  
 Type the characters in the Look For text box, and press *Enter*.



### To find text using the Find dialog box

Click the Find icon, or click Edit | Find. You can then search the current memo. To set search criteria, click the Advanced Options button.



### *Setting search options*

Clicking Advanced Options lets you choose other search criteria, including which folder(s) to search.

The options available in the Find dialog box are

- ◆ **Match Whole Words Only.** Find only if the characters you enter appear as a separate word in the text.
- ◆ **Match Case.** Find only if the capitalization matches the characters you entered.
- ◆ **Date range.** Limit search to dates before a date, between two dates, or after a date.
- ◆ **Select Folders.** Specify all folders or only certain folders.

## Found text

Once you have completed a search using the Find dialog box, you can see all instances of the text you entered that TrueSync Desktop has found.

### TIP

If you use any Advanced Options in the Find dialog box, TrueSync Desktop automatically opens the Found list to show you all memos where the text was found.

### To see all instances of your Find text

Choose Edit | Found Text. You will see the dialog box shown below, listing all memos containing instances of the text you entered.



Click to go to the next instance of the found text in any of the memos.

## Replacing text

### To find and replace text

Choose Edit | Replace. The Find and Replace dialog box appears.

Type the text you want to replace and the replacement text.

Check box to match capitalization.

Check box to find whole words only.

Click to see lower panel of Advanced Options (shown).

Click Find Next to go to the next instance...

then click Replace to replace it, or Find Next to skip it and continue search.

Click Replace All to automatically replace all instances.

Check box to include subject in search.

Select folders to search or check All Folders.

## Working with folders

### To create one or more new folders

1 Choose Memos | Folder | Add. The Add Folder dialog box appears.

- 2 Enter a name for the folder (up to 24 characters). Choose Add and click OK.



### To delete one or more folders

- 1 Choose Memos | Folder | Delete. The Delete Folder dialog box appears.
- 2 Select the folder from the list and choose Delete.

**WARNING** All memos contained in the folder will be deleted. Be sure to save any memos you want to keep.

- 3 Click Yes and then click OK.

### To change a folder's name

- 1 Choose Memos | Folder | Modify or right-click the folder tab. The Modify Folder dialog box appears.
- 2 Select the folder from the list, make any change to its name, choose Modify, and then click OK.

### To go to a folder without clicking its tab

- 1 Choose Edit | Go To Folder. The Go to Folder dialog box appears.
- 2 Choose the folder from the list and click Go To.

This can be useful when you have a large number of folders.

### To reorder the folder tabs

- 1 Choose Memos | File | Reorder Folders. The Reorder Folder Tabs dialog box appears.
- 2 Select each folder name and choose Up or Down to move the folder in the list.

---

## ***Working with Memo files***

A new memo file initially contains one unnamed folder and no memos.

### **To create a new Memo file**

Choose File | New Memo File.

See also “Extracting memos” on page 81 to create a memo file containing a specific group of records.

### **To save a Memo file**

Choose File | Save Memo File, or click the Save Current Memo File button in the Toolbar.

If you want to save a memo file under a new name, choose File | Save Memo File As and specify the name.

### **To open an existing memo file**

Choose File | Open Memo File and select the memo file.

---

## ***Working with multiple memos***

In addition to editing the information in a memo, you can perform various actions—like deleting—to the memo itself. You can also perform these actions on several memos at once by selecting them.

### ***Selecting memos***

**To select multiple memos, do either of the following:**

- ◆ Click a memo’s subject line in the memo list, and then press *Shift* and click another memo’s subject. The two memos and all memos between them are selected.
- ◆ Press *Ctrl* and click several memos’ subjects in the memo list. Only those memos you *Ctrl*+click are selected. Once you have selected multiple memos, you can also use *Ctrl*+click to deselect individual memos.

You can perform several functions after selecting multiple memos:

- ◆ Deleting (see “Deleting memos” on page 74)
- ◆ Exporting (see “Exporting memos” on page 80)
- ◆ Printing (see Chapter 8)
- ◆ Moving memos from one folder to another (see “Moving memos between folders” on page 74)

## Marking memos

Marking memos gives you another way to specify a group of memos for certain actions, like deleting or printing. Marked memos are distinguished by a red triangle on the left side of their subject lines.

### To mark a memo

Choose Memos | Memo | Mark Current Memo, press *Ctrl+K*, or right-click a memo in the Memos list.

### To unmark a memo

Choose Memos | Memo | Unmark Current Memo, press *Ctrl+K*, or right-click it in the Memos list.

### To unmark all marked memos

Choose Memos | Memo | Unmark All.

## Deleting memos

You can delete a single memo, selected memos, or marked memos.

### To delete multiple memos

Select them from the Memos list and drag them to the Delete icon on the Desktop. Or choose Memos | Memo | Delete, where you can choose to delete the current memo, selected memos, or marked memos.

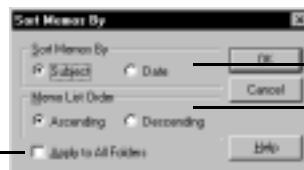
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## Sorting memos

The Memo view contains a listing of memo subjects in the current folder. You can sort memos by subject or date created, in ascending or descending order, for the current folder or all folders.

### To sort the memos in the current folder (or all folders at once)

Choose Memos | Memo | Sort. The Sort Memos By dialog box appears.



Check *Apply To All Folders* to sort all memos. Leave unchecked if you want to sort only the memos in the current folder.

Select either *Subject* or *Date* for the sorting.  
Select either *Ascending* or *Descending* to order the memos.

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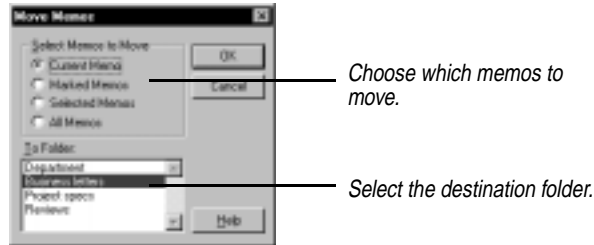
## Moving memos between folders

### To move memos from their current folder to another

You must have more than one memo folder open to activate the Move menu. Drag the memos from the Memos list to the tab of the target



folder. Or you can choose Memos | Memo | Move, which displays the Move Memos dialog box.

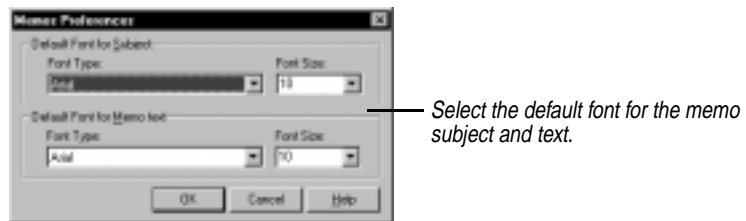


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## *Setting preferences*

**To set preferences for the Memos view**

Choose Tools | Preferences | Memos.



Changes you make to the subject and memo fonts take effect for memos you create after the font changes.

---

## *Quick Letter*

TrueSync Desktop's Quick Letter feature instantly creates a letter from information in the current card, formatted and ready for you just to type in the text. Although Quick Letter operates in Memos view, you can activate it from Contacts and Calendar views as well.

Quick Letter makes use of merge templates that specify where different pieces of information from the card should be placed in the memo. TrueSync Desktop comes with predefined templates.

You can create or modify merge templates, and you will need to do so if you want to merge using cards that are not in the standard Business or Personal cardfile formats (see "Creating merge templates" on page 76).

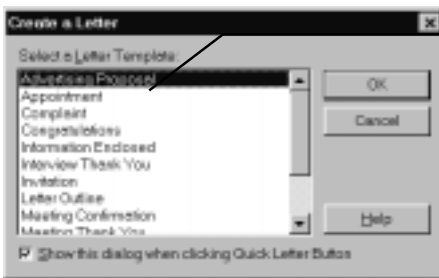
## *Using Quick Letter*

**To create a Quick Letter from a template**

- 1 In the Contacts view, click on the index of the card you want to merge with the template.

2 Choose Tools | Quick Letter.

3 From the Create a Letter dialog box, choose the template you want.



Choose the template you want from the Create a Letter dialog box.

The information from the current card is inserted in the template to create an instant letter.



## Creating merge templates

A merge template is composed of *constant text* and *fields*. Constant text, like “Dear,” or the text of a letter, remains the same on all the merged memos. Fields, like {First Name}, insert different text into the merged memos depending on the information in the cardfile. By combining both of these kinds of text, you end up with, for example, Dear Jennifer on one memo and Dear Patrick on another.

TrueSync Desktop recognizes the following field codes:

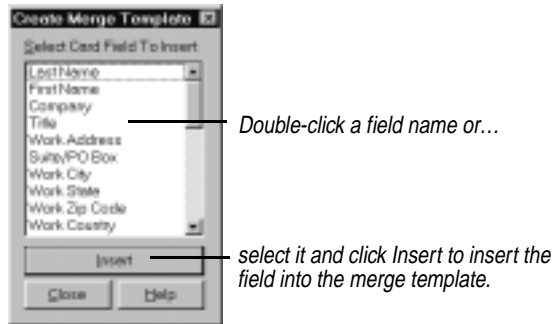
- ◆ Field names enclosed in { }, such as {Last Name}. The information is drawn from the current card in the active cardfile.
- ◆ Field names with a leading # are replaced with system information. These include {#Username}, {#Company}, {#Date}. (The date format used is set in the Windows Control Panel, Regional Settings. TrueSync Desktop uses whatever you have selected as the Short Date format.)
- ◆ Field names surrounded by # #, such as {#Product#}. You will be prompted to fill these in at merge time. (This option is not available with QuickLetter.)

## To create a merge template

**1** In the Memos View, create a new memo and write the constant text for the merge template, such as the content of a letter.

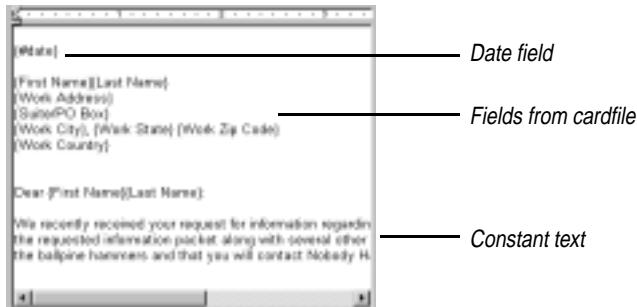
Be sure to include such unchanging information as your return address at the top. You can apply whatever fonts and formatting you need for an attractive letter.

**2** Insert field names from the active Cardfile where appropriate. To insert a field name, click your mouse in the memo file where you wish to insert the field. Then choose Memos | Mail Merge | Create Template. The Create Merge Template dialog box appears.



Inserted fields appear in the merge template between braces, such as {Last Name}.

You also can type field names, including the special types for system information and fill-in information.



**3** Save the memo file.

**4** If you want to use the new template for Quick Letter as well as Mail Merge, use Memos | Memo | Export to save the template in rich text format (.RTF), in the TrueSync Desktop\Template folder. See “Exporting memos” on page 80 for more information. Note,

however, that Quick Letter does not recognize the manual fill-in field types such as {#Product#}.

## ***Personalizing memos***

TrueSync Desktop makes it easy to create custom memos by merging any number of cards from your Cardfile to create personalized letters.

TrueSync Desktop's mail merge uses templates similar to those used by Quick Letter. Using a template, you can select one or more cards from the Contacts View and merge them with the template to create personalized letters.

## ***Merging cards***

When you perform a merge, the field names in the template are replaced with the field information for one or more people in the Cardfile.

**NOTE** If there are no merge fields in the selected memo, the contents of the first ten fields on a card are copied into the memo. If a field in the template is not found on the card, the Fill In Information dialog box appears prompting you for text with which to replace the empty field.

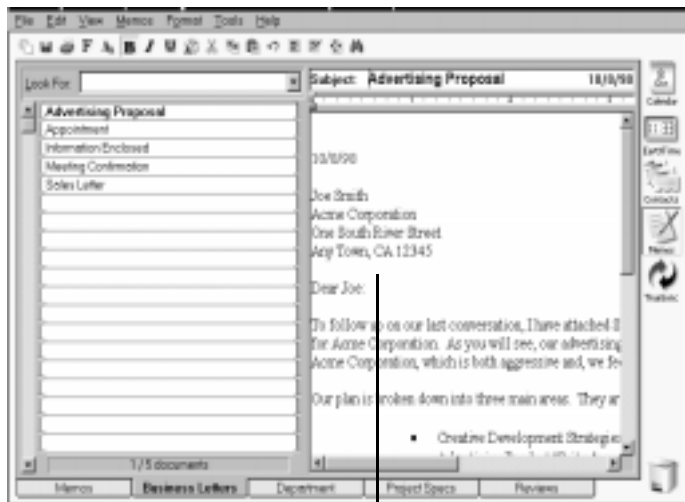
### **To merge cards with a merge template**

Choose Memos | Mail Merge | Cardfile.

- 1 Choose Memos | Mail Merge | Cardfile.
- 2 The Merge Card dialog appears. Check Current Card if you want to merge a single card. Check other options you want.



- 3 The merged letter appears as a new memo, or is automatically printed for you, or both, depending on the options you selected in Step 2 above.



To merge multiple cards, select or mark them before you use the command Memos | Mail Merge | Cardfile to open the Merge Card dialog box and perform the merge.

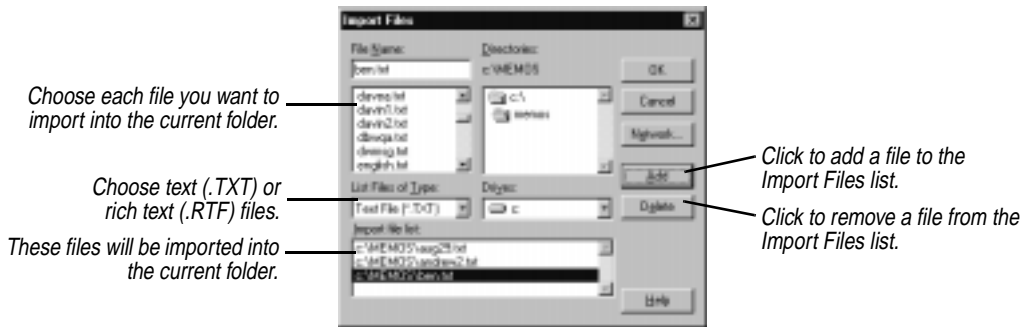
---

## ***Importing text and .RTF files***

You can import text or rich text format (.RTF) files into a memo, and you can import several files at once. Imported text files are added to the current folder.

### **To import a text file**

From the Memos view, choose Memos | Memo | Import. Then choose the file you want to import in the Import Files dialog box.



You can also cut and paste documents from other applications such as Microsoft Word. TrueSync Desktop does not support graphics or bitmaps.

---

## ***Opening other file types***

TrueSync Desktop can open files created in other applications.

Note that if there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see “The Readme file” on page 10.

**NOTE** TrueSync Desktop uses the same file format for Memo files that Sidekick 99 uses, and the same file format that Sidekick 98, Sidekick 97, and Internet Sidekick use for Write Binders.

### **To open a file created by another application**

**1** Choose File | Open Memo File.

- 2 Click the arrow at the Files of Type box and choose the file type from the list.
- 3 Specify the file location and name.

**NOTE** If you install TrueSync Plus for REX, you can synchronize information directly among supported desktop applications and services, TrueSync Desktop, and your device, without having to import data. To find out which products are supported, see “Supported desktop applications” on page 3.

## *Exporting memos*

The Memos view includes two commands for exporting memos.

### **To export the current memo to RTF**

Choose Memos | Memo | Export. Specify the name you want for the .RTF file and click Save.

You can also export multiple memos and folders to the Clipboard, to a text file, or to a rich text format (.RTF) file.

### **To export memos or folders**

Choose Memos | File | Export. The Export Memos dialog box appears.



When you have chosen the memos to export, click OK. If you are exporting to a file, the Save As dialog box appears. Type a name for your new file and click Save.

**NOTE** If there are last-minute changes or additions to the import/export capabilities of TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see “The Readme file” on page 10.

---

## *Extracting memos*

You can use the Extract command to create a new memo file containing a specific group of the records in an existing file. You can select the records yourself, by marking or selecting, or use conditions to specify the records to extract.

### **To extract memos into a new, unnamed memo file**

- 1** Select, mark, or use Find to locate the memos you want to extract, if appropriate. The options to extract marked memos, selected memos, or found memos are dimmed unless you use one of these methods to select memos before using the Extract command.
- 2** Choose Memos | Memo | Extract.
- 3** Specify what to extract, and the folders to extract from. If you extract by condition, another dialog box opens when you click OK where you specify the conditions.



- 4** Click OK.

TrueSync Desktop creates a new memo file containing only the memos you have specified.

---

## *Combining memos*

**To add all the memos and folders from another memo file to the open file**

- 1** Choose Memos | Folder | Combine. The Combine Memos dialog box appears.
- 2** Select the memo file you want to merge with the open file and click Open.

TrueSync Desktop merges the selected file's folders and memos with the open file's folders and memos. If any folder names are the same, the memos in those folders in the selected file are merged into the correspondingly named files in the open file.





# *The EarthTime view*

EarthTime displays a map showing daylight and night time around the world, and shows the current time at eight different cities you select. You can use EarthTime to calculate the difference in time between two locations, and you can configure it to show both your home location and the local time as you travel.



To open EarthTime, click the EarthTime icon in the Deskpad or choose View | EarthTime. The Deskpad icon shows the current time.

Every time you use the TrueSync view to synchronize your data, your EarthTime settings, such as the Home clock, Local time, and the other world clock settings, will automatically be transferred to your device.

**NOTE** If you install TrueSync Plus for REX, you can synchronize time zone and clock information directly among supported desktop applications and services, TrueSync Desktop, and your device. To find out which products are supported, see “Supported desktop applications” on page 3.

This chapter explains how to:

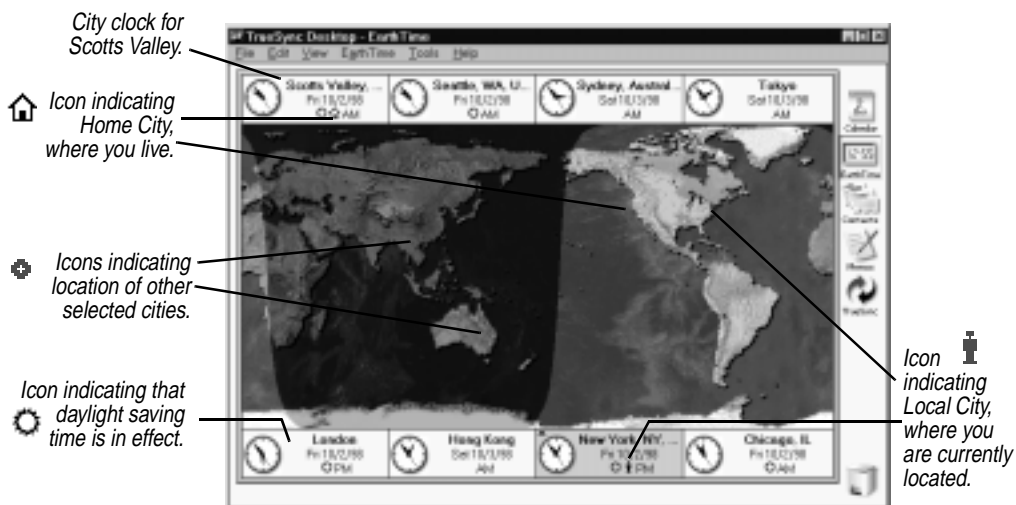
- ◆ Select cities
- ◆ Set and change the Home Clock and Local Time
- ◆ Determine time differences
- ◆ Use the Internet Time Synchronizer

## *The EarthTime globe*

When you click the EarthTime icon, you see a map of the globe. Light areas are in daylight, and the shading represents night time.

The leading edge of the sunlight area, as it moves from east to west, is where sunrise is occurring, and the trailing edge of sunlight is where the sun is setting. The position of the shading is updated

automatically every minute. In addition, you can see the light and shadow area move as the seasons change.



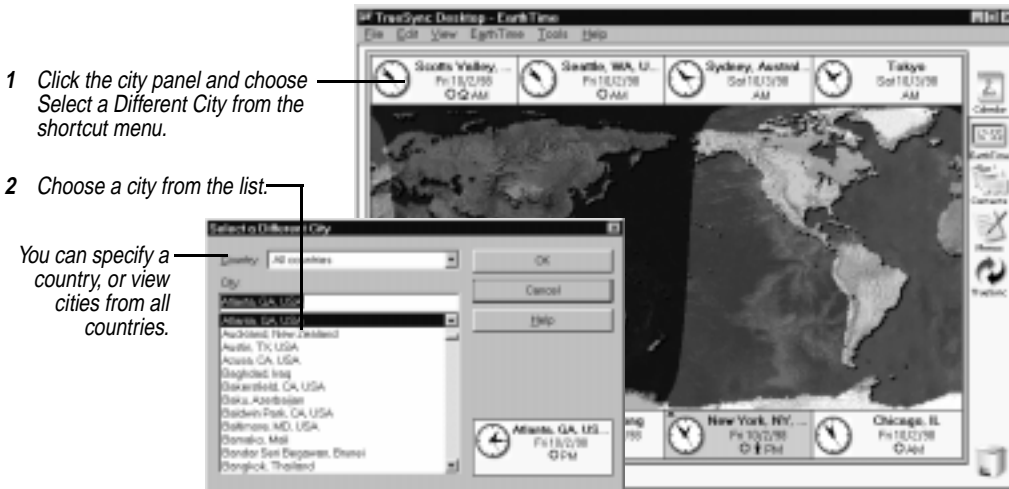
Above and below the map of the globe are the names and local date and time information for eight cities. EarthTime has a database of over 540 cities you can select from in choosing world city clocks to display.

## Selecting cities

### To change one of the displayed cities

Click the panel containing the city you want to change. Or you can click the city panel, and then choose Edit | Select a Different City.

If you want to display GMT (Greenwich Mean Time) without daylight saving time, select GMT/UTC/Zulu in the city list.



## ***Home Clock and Local Time***

EarthTime lets you designate the time where you live as your Home Clock. Most of the time, the Home Clock will match the local time where you are. If you travel with your computer to another time zone, you can set another city as the Local Time.

When you change the Local Time, TrueSync Desktop adjusts all your events to display in the current local time. For more details, see “Help for travelers: changing time zones” on page 30.

### ***Changing the Local Time***

Change the Local Time when you travel with your computer to another location in a different time zone than your Home Clock.

#### **To change the Local Time**

- 1 Set one of the eight city panels to display the local city.
- 2 Click the panel containing the local city and click *Set as Local Time* from the shortcut menu.

An icon appears to indicate the Local Time city. 🗺️

### ***Changing the Home Clock***

Your Home Clock should be set automatically when you first start TrueSync Desktop. Use the following procedure if you need to change it.

#### **To change your Home Clock**

- 1 Set one of the eight city panels to display your home city.

- 2 Click the panel containing your home city and click Choose As Home Clock from the shortcut menu.

An icon appears in the Home Clock panel. 

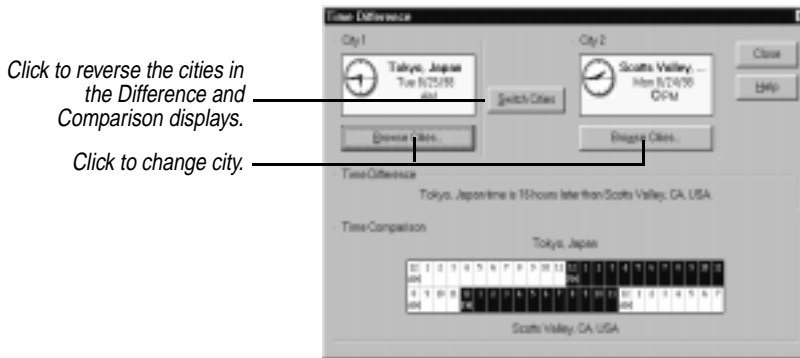
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## *Time differences*

Time differences between any two locations can be displayed graphically in EarthTime.

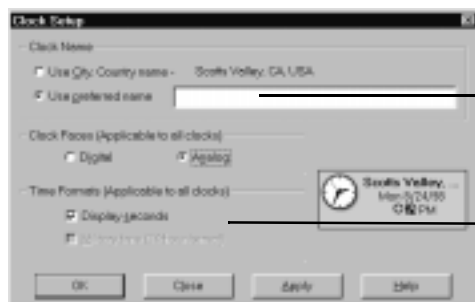
### **To view time differences**

Click one of the city panels and choose Time Difference from the shortcut menu.



### To change a clock's options

Click the city panel and choose Clock Setup from the shortcut menu. Choose the options you want to change from the dialog box.



To change the displayed city name, type it here.

Click the appropriate boxes to show or hide seconds, and to display time in 12-hour or 24-hour format (Military time for digital clocks only).

---

## Centering a map location

The EarthTime map can be shifted left or right to put your city, or any map location, at the center.

### To center one of the eight displayed cities

Click the city panel and choose Make (city) the Map Center.

### To center another map location

Point to the map location you want at the map center and right-click. Choose Center Map Here.

---

## Using the Internet Time Synchronizer

The Internet Time Synchronizer is a separate utility that lets you set your computer's system time using an Internet time server. You must have Internet access to use this feature.

**NOTE** If there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see "The Readme file" on page 10.

### To set up your system for time synchronization

Choose Tools | Time Synchronize | Time Synchronizer Setup in any view except the TrueSync view.

The Time Synchronization dialog box appears. Use it to select a time server and specify a schedule for synchronizing, if desired. For more information, click the Help button in the dialog box.

To disable the Time Synchronizer, select zero under Schedule in the Time Synchronization dialog box (Synchronize every 0 minutes).

**To synchronize your system with an Internet time server**

Choose Tools | Time Synchronize | Synchronize Time Now, or open the Time Synchronization dialog box and click the Synchronize Now button. The dialog box shows the results of the latest time synchronization in the bottom panel.

# *The TrueSync view*

When you enter and change your Calendar, Contacts, and Memos files and/or update the data in your device(s), you can synchronize the latest information between TrueSync Desktop and your device(s) and/or service(s).

If you install TrueSync Plus for REX, you can synchronize information directly among any supported desktop applications, services, and devices without having to import data. To find out which products are supported, see “Using TrueSync Plus for REX” on page 106.



To synchronize your data, click the TrueSync icon on the Desypad, press *F8*, or choose View | TrueSync. You can also start TrueSync Plus for REX directly by clicking the Start button in the Windows Taskbar and choosing Programs | TrueSync Plus | TrueSync Plus.

This chapter explains how to

- ◆ Set up the initial synchronization configuration
- ◆ Synchronize your device
- ◆ Change your data selections
- ◆ Customize your device options and back up data from the card
- ◆ Select whether to synchronize or overwrite your data
- ◆ Set up multiple users, and customize their preferences
- ◆ Use TrueSync Plus for REX

The following figure illustrates the TrueSync view.

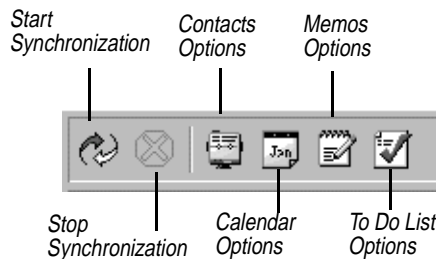
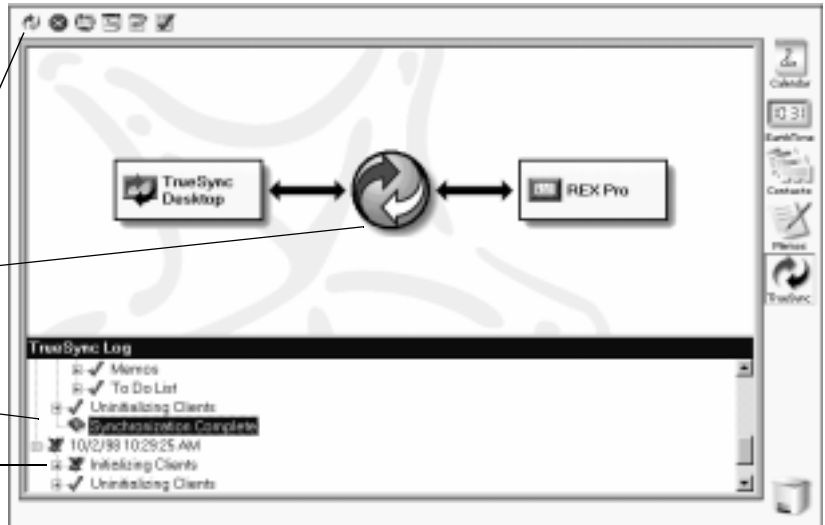
The TrueSync view. This example shows you TrueSync Desktop and a REX PRO card set up for synchronization.

Toolbar (shown below)

Click the TrueSync icon to start the synchronization process.

The Log pane shows you the results of your synchronizations.

Click plus signs to expand the log entries. Select an error message and press F1 to get Help on that error.



Note that the TrueSync toolbar cannot be customized.

## Setting up the TrueSync view

The initial synchronization process is divided into three basic procedures.

**NOTE** If there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see “The Readme file” on page 10.

### ◆ Selecting the synchronization configurations.

Before you can synchronize information for the first time, you must complete the Setup Wizard in the TrueSync view. The Setup



Wizard lets you select which files to synchronize and other preferences. Once you have completed the Setup Wizard, you can change your synchronization configurations using the menus and toolbar buttons.

◆ **Connecting the device to a computer.**

In order to synchronize information, your device must be properly connected to a personal computer. You will need either a Type II PC card (PCMCIA) slot or the docking station and an available serial communications (COM) port. To learn how to connect your device to a computer, refer to its *User's Guide*.

◆ **Synchronizing information with the device.**

Once the synchronization configurations are selected and your device is connected to your computer, you are ready to synchronize. See “Synchronizing information” on page 94 to learn how.

Depending on the amount of data you have, you may synchronize all of these types of information, or you may choose to synchronize only specific information. For example, if you are going on a business trip, you could synchronize the calendar date range of the duration of your trip. Then you could select travel and business cardfiles, along with a Memo file containing information related to the trip.

## *Selecting the synchronization configuration*

The Setup Wizard lets you select which files to synchronize, specify how the device is connected to your computer, and select other preferences. Once you have completed the setup wizard, you can change your selections as described later in this chapter.

**NOTE** You can add synchronization capability for additional supported devices and services. See [www.starfish.com](http://www.starfish.com) for free TrueSync Accessor downloads, including selected Windows CE 2.0 devices.

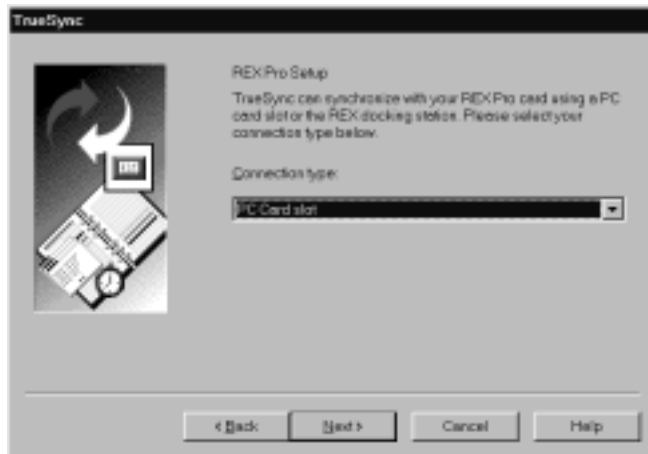
### **To start the Setup Wizard**

- 1** Click the TrueSync icon on the Desktop, or right-click the TrueSync icon in the Windows taskbar and select Configure.
- 2** The Welcome panel displays. Click Next to continue.
- 3** Select TrueSync Desktop as your Desktop Application.

- 4 Specify the location of the data you want to synchronize. The setup wizard displays the default user data directory and you should choose that unless you have stored your data in another location.
- 5 Choose which device you want to set up for synchronization.
- 6 Use the drop-down list in the next panel to choose the type of connection you want. If you are not sure, refer to your REX documentation. If you will be using serial connections to synchronize more than one device at the same time, make sure you select a different COM port for each device.

### ***Device Setup***

*When you finish with each panel, click Next.*



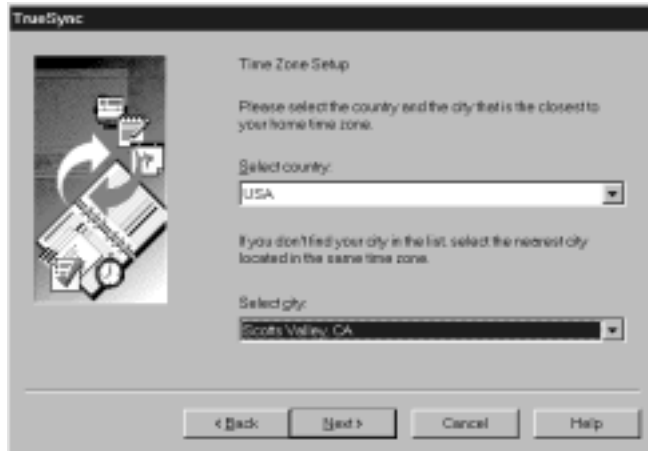
- 7 The next panel tells you the synchronization software is ready to begin reading data from TrueSync Desktop and your device. Make sure the device is properly connected to your computer before clicking Next. Data is not being transferred or changed during this step.

- After the data has been read, use the next panel to select the country and city nearest to your time zone.

## Time Zone Setup

Click **Help** to learn more about each panel.

To return to any panel, click **Back**.

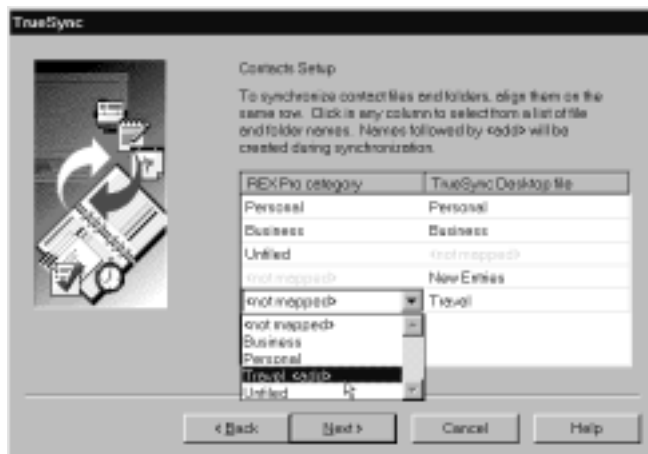


- In the next panel, select up to four Contacts cardfiles to synchronize. To synchronize two items, align them on the same row. Click in any column to select from a list of file names. If <not mapped> in one column is aligned with a file name in another column, it means that file will not be synchronized.

See “Selecting data to synchronize” on page 98 for detailed instructions.

## Contacts Setup

The <add> means a new file will be created during synchronization.



- 10 Select the level of field mapping you want to use. See “SmartMap™” on page 101 for a list of the fields included in each level.

## Contacts Setup

*Use this panel to control how Smartmap automatically maps your Contacts fields during synchronization.*



- 11 Select the Calendar file you want synchronized with your device. (By default, the name of the file is your initials.)
- 12 Select the Memos file(s) to synchronize. You can select one Memos file to synchronize with a REX card and up to four files to synchronize with a REX PRO card.
- 13 Select the To Do list you want to use.
- 14 Once you have finished your selections, you can click Finish, or click the Back button to make any desired changes.

See “Changing your data selections” on page 97 to learn how to change your configuration.

## Synchronizing information

After you complete the Setup Wizard, and your device is connected to your computer, you are ready to synchronize.

To synchronize files from another personal organizer, you must first import those files. To learn how to import files, refer to the relevant chapter, such as “The Calendar View” in this manual. Note that if you install TrueSync Plus for REX, you can synchronize files from supported personal organizers directly, without having to import data.

See “Using TrueSync Plus for REX” on page 106 to learn more about synchronizing with TrueSync Plus for REX.

**NOTE** If multiple user names have been set up, the user name that was used most recently is selected for synchronization. To select another user name, choose Synchronize | Set User. To learn more about users, see “Setting up multiple users” on page 106.

### To synchronize your device

- 1** If the TrueSync view is not displayed on your computer screen, do one of the following:
  - ◆ Choose View | TrueSync from the TrueSync Desktop menus.
  - ◆ Click the TrueSync icon on the Desktop.
  - ◆ Press *F8*.
- 2** Once the TrueSync view displays, do one of the following:
  - ◆ Click the TrueSync icon in the center of the screen.
  - ◆ Choose Synchronize | Start.
  - ◆ Click the Start Synchronization toolbar button.

The log file displays the synchronization status. If your synchronization was not successful, view the log file to see details about the process. (See “Viewing the log file” on page 96.)

The synchronization time depends on the size and number of files.

**CAUTION** Do not disconnect the device from your computer while files are being synchronized or data will be lost.

If your device is protected with a password, click the key buttons in the Enter Password window to enter your five-button password, then click OK.



*Click the key buttons to enter the five-button password and then click OK.*

If synchronization does not begin and a warning appears, check the following:

- ◆ Make sure that the device is fully and properly inserted into a PC Card slot or a docking station.
- ◆ Make sure that the device's connection type (PC card slot or docking station) matches the selection in the device's Options window. To check the setting, choose Client | *Clientname* options, or click the device's icon in the TrueSync view.
- ◆ If you are using a docking station, make sure that the serial cable is properly connected to an available serial communications (COM) port on your computer.
- ◆ Check the status of the batteries in the device and/or the docking station or cradle. See the device's *User's Guide* to learn how.

**NOTE** If you decide to cancel a synchronization by clicking the Stop Synchronization toolbar button, be sure to let the synchronization stop completely before closing TrueSync Desktop. The cancellation process may take some time to complete.

Once synchronization is complete, click OK.

Press the eject button on either the docking station or the PC card slot on your computer to remove the device.

## Viewing the log file

The log file records messages regarding your last synchronization session. The messages provide details on the progress of your synchronization and the results.

Select Synchronize | Options and click the Log tab to specify how often the log file entries are cleared. Click Clear Log Now to remove all entries currently in the log file. If you want the log to be automatically expanded and show your error messages and warnings, check the box. If you do not check this box, you will need to click the plus signs (+) to expand.

To get help on an error message, highlight the error message and press F1.



To resize the Log pane, drag the divider to expand or collapse it.

### To view the log file

- 1 If the log is not already in view, choose View | Log.
- 2 If needed, click the plus signs (+) to expand any section and view its details.

## *Launching synchronization from the taskbar*

You can synchronize without starting TrueSync Desktop by using the TrueSync icon on the Windows taskbar. If TrueSync Desktop has been configured, you can then synchronize your device with a single step.

### To launch synchronization from the taskbar

- ◆ On the Windows taskbar, double-click the TrueSync icon. Or, right-click the TrueSync icon and then select Synchronize.



If TrueSync Desktop has not been configured, you can right-click the TrueSync icon on the taskbar and select Configure. You can then complete the Setup Wizard. Once the initial configuration has been set up, this option is no longer available.

---

## *Changing your data selections*

You can easily change which files or folders are synchronized to the device using the Data menu or the toolbar buttons. The following example explains how to change Calendar options but the same instructions apply to Contacts, To Do Lists, and Memos. In addition, you can specify a date range for Calendar synchronization (see “Calendar options” on page 99), or you can customize your Contacts mappings (see “Contact options” on page 100).

### To change Calendar options

- 1 Change to the TrueSync view by clicking the TrueSync icon on the Desktop, choosing View | TrueSync, or pressing *F8*.
- 2 Choose Data | Calendar or click the Calendar toolbar button.
- 3 Click the Refresh List button to update the list of files and folders that are displayed. (Whenever you add or delete files or folders, you will need to update the list.) Depending on your synchronization settings, you may need to connect your device to your computer.

- 4 Select the file or folder you want to synchronize. See “Selecting data to synchronize” on page 98.
- 5 If desired, click the Do not synchronize Calendars checkbox to exclude Calendar data from the synchronization process.
- 6 Click OK when you are finished.

**NOTE** If you delete a file or folder and do not change your synchronization options, that file or folder will be recreated when you synchronize.

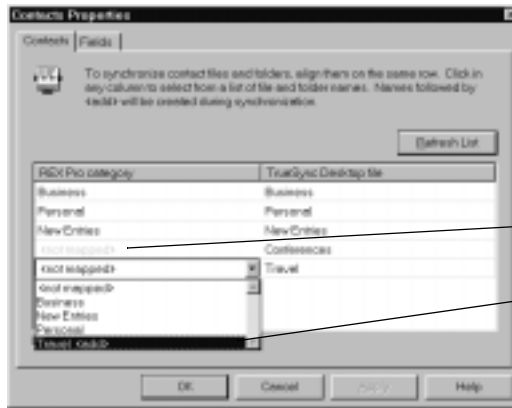
### *Selecting data to synchronize*

When you are ready to select the files or folders that you want to be synchronized, you will see that the column for TrueSync Desktop lists that application’s existing files or folders. The column for the device lists the file or category names that will be present on the device after you synchronize.

The number of items you can synchronize is limited by the device. You can synchronize four Contacts folders, one Memos (Notes) folder, one Calendar folder, and one To Do List (Tasks) folder to the REX card. You can synchronize four Contacts files, four Memos files, one Calendar file, and one To Do List to the REX PRO card.



To synchronize two items, align them on the same row. Click in any column to select from a list of file and folder names. Names followed by <add> will be created during the synchronization process.



*If <not mapped> in one column is aligned with a folder name in another column, it means that folder will not be synchronized.*

*If this item is selected, it will be created during synchronization.*

**NOTE** After you have set up your initial data to synchronize, you can delete folders or categories on your device by setting them to <not mapped> and then choosing yes when asked if the category should be deleted. During the next synchronization, the data in that category will be removed. Look up “deleting data” in the online Help index to learn more.

## *Calendar options*

In addition to specifying the name of the calendar file to synchronize, you can limit or expand the range of calendar data synchronized to the device. You can speed up the synchronization process by restricting the date range. Doing so also reduces the amount of memory utilized by your device. To set the Calendar date range, select Data | Calendar, or click the Calendar toolbar button, then click the Options tab and select a date range using the From and To list boxes.

If a specific date range is selected, calendar information outside that range will not be transferred to your device.

The “From” date sets the first day that calendar entries will appear on your device.

- ◆ **Last Year** selects January 1st of the previous year as your start date.
- ◆ **This Year** selects January 1st of the current year.
- ◆ **Last 6 Months** selects six months ago today. (For example, if today is August 10, this option would make February 10 the start date.)

- ◆ **Last Quarter** selects the first day in the last quarter. (The quarters are January-March, April-June, July-September, and October-December.)
- ◆ **Last Month** selects the first day of last month.
- ◆ **Last Week** selects seven days prior to today.
- ◆ **This Quarter** selects the first day in the current quarter.
- ◆ **This Month** selects the first day of the current month.
- ◆ **This Week** selects today.
- ◆ **Today** selects today.
- ◆ **First Event** selects the day where you have your first entry.

The “Through” date sets the last day that calendar entries will appear on your device.

- ◆ **Tomorrow** selects tomorrow as your end date.
- ◆ **This Week** selects seven days forward from today.
- ◆ **Next Week** selects 14 days forward from today.
- ◆ **This Month** selects the last day of this month.
- ◆ **Next Month** selects the last day of next month.
- ◆ **This Quarter** selects the last day of the current quarter.
- ◆ **Next Quarter** selects the last day of next quarter.
- ◆ **This Year** selects December 31st of the current year.
- ◆ **Next Year** selects December 31st of the following year.
- ◆ **Last Event** selects the day where you have your last entry.

**NOTE** To synchronize the entire Calendar, select “First Event” as the From date and “Last Event” as the Through date.

## *Contact options*

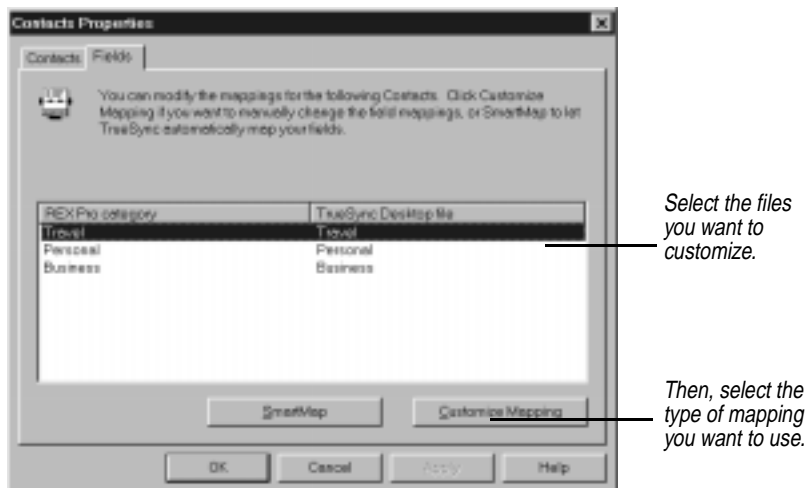
You can easily customize how your Contacts files are mapped to the fields on your device. TrueSync Desktop allows you to map fields automatically, or to select how each field is mapped. Both methods are described in the sections that follow.

### **To customize your Contacts mappings**

- 1 Change to the TrueSync view by clicking the TrueSync icon on the Desktop, or choosing View | TrueSync.

- 2 Click the Contacts menu item on the Data menu, or click the Contacts toolbar button.
- 3 Click the Fields tab.

The Fields tab displays a list of currently mapped files along with two buttons used to customize how they are mapped. The function of each button is described in the sections that follow.



## **SmartMap™**

TrueSync Desktop uses SmartMap technology, which automatically maps your Contact fields to the device during the synchronization process. You can specify the level at which SmartMap maps your fields.

To select the level of field mapping that you want TrueSync Desktop to use, click SmartMap. Choose the minimum, typical, or maximum level of field mapping. Minimum maps the fewest fields to your device, and is useful when you want to synchronize a large number of Contacts. Typical maps the commonly used fields. Maximum maps the most fields.

If you select Minimum, the following fields are synchronized to your device: Last Name, First Name, Company, Title, Work Phone, Work

Phone2, Email, Work Fax, Home Fax, Cell Phone, Car Phone, Pager, Other, Main Phone, Web, Notes.

**NOTE** If you create fields called “Sort 1”, “Sort 2”, and “Sort 3” in a cardfile, they will automatically be mapped in place of the First Name, Last Name, and Company fields and will display as sort fields on your device.

If you select Typical, the following additional fields are synchronized to your device: Work Address, Suite/PO Box, Work City, Work State, Work Zip, Work Country, Home Address, Apt/PO Box, Home City, Home State, Home Zip, Home Country.

If you select Maximum, all the fields above are synchronized, as well as: Work Phone3, Email2, Email3, Other2, Main Phone2, and others.

**NOTE** If you have a large number of Contacts and want to save space on your device, the minimum level is recommended. Note that if you select the maximum level, the synchronization process may take longer, and the data will take up a larger portion of the device’s available memory.

If you desire, you can manually customize your field mappings, as described below.

### ***Customize mapping***

To manually customize your field mappings, click Customize Mapping.

To change a field mapping, click the field that you want to change and select the new name from the list. You can reduce the amount of memory used on your device by removing any mapped fields that you do not normally need.

Click Unmap All if you want to remove all field mapping.

### **To synchronize additional Contacts or Memos**

If you already have reached the limit for numbers of Contacts or Memos files or folders set up for synchronization on your device and want to synchronize another one, you will need to deselect one of your mapped files. To do so, click the file or folder name that you want to deselect. Then use the drop-down list to choose the name of the replacement file or folder.

Or, you can merge several Contacts or Memos files into a new file and synchronize that file instead.

---

## ***Changing your device options***

### **To change your device options**

- 1** Click the device's icon in the TrueSync view, or right-click the device's icon and select Options from the shortcut menu. Or, choose Client | *Clientname* options from the main menu.
- 2** Change the options as desired. For example, if you have moved, you can click the Preferences tab and enter your new address. That way, if you lose your device, it can be returned to you.



*Preferences page for the REX PRO card.*

*Display this page by clicking your device's icon in the TrueSync view and clicking the Preferences tab.*

For details on each of the options listed on the Preferences page, see your device's *User's Guide*.

## ***Editing QuickLists***

If you have a REX PRO card, QuickLists allow you to enter events or task items on the REX PRO without typing them. These “pick lists” are based on your user profile. You can customize the QuickLists that display on the device by adding repeated events and tasks, so you can select them instead of typing them. Up to ten items can be displayed in a QuickList on the REX PRO card.

You can also remove any items that you do not use, or change your User Profile.



Select the list you want to customize from the drop-down list box. A list of pre-defined items displays below.

Click Add and type the name of the item you want to add.

Select an item and click Remove to delete it from the list.

Click Reset to clear all of the lists in the current User Profile or to select a new profile. Selecting another Profile will reset all of the lists with the original pre-defined items.

Next time you synchronize, this information will be synchronized to your REX PRO card, and will be available when you enter or edit data.

## ***Backing up and restoring data***

The Backup command copies a complete data image from your device. The Restore command restores that image to the device.

**NOTE** Be cautious when you perform a Restore operation, because the data on your device will be overwritten. For example, suppose you backed up your data on your device last week, and that you have synchronized data several times to your device since that date. If you then restore the backed-up data image that was created last week, you will lose any changes and additions that were made in the interim. For that reason, you may want to perform a backup of your device's data before you perform a restore.

### **To back up a data image**

- 1** Choose Client | Backup/Restore. The Backup/Restore dialog box appears.
- 2** Click the Backup button.
- 3** Select your device as the client. Enter a descriptive comment, such as Project Alpha, about the data. Then click the Backup button to start the process.

### **To restore that image**

- 1** Choose Client | Backup/Restore. The Backup/Restore dialog box appears.
- 2** Select the image that you want to restore.
- 3** Click Restore.

### **To delete backed-up data images**

- 1** Choose Client | Backup/Restore. The Backup/Restore dialog box appears.
- 2** Choose the backup that you want to delete, and click the Delete button.

---

## ***Selecting synchronization or overwrite options***

To change your synchronization options, click a client's icon in the TrueSync window or select Client | *Clientname* Options. The options are:

- ◆ Do not synchronize
- ◆ Synchronize
- ◆ Will be overwritten during next synchronization
- ◆ Will always be overwritten

### **Do not synchronize**

This option excludes the client from the synchronization process without uninstalling that client. You can use this option to synchronize two clients, while excluding a third. For example, you could synchronize TrueSync Desktop and one device, and exclude another device.

### **Synchronize**

Selecting this option includes the client's data in the synchronization. Records may be added, deleted, or modified on this client, depending on how you set the options for your other clients.

For example, if you are using TrueSync Desktop and a REX card, you may want to set TrueSync Desktop to synchronize, so that TrueSync Desktop data will be written to your REX card.

### **Will be overwritten during next synchronization**

This option overwrites the client's data on a one-time basis with data from the other clients. This is useful if you want to overwrite the client the first time, and then synchronize from then on. Be very cautious about selecting this option for a desktop application such as TrueSync Desktop.

### **Will always be overwritten**

Selecting this option overwrites the client's data during each synchronization. The client's data is replaced with data from other clients.

**CAUTION** If you select one of the overwrite options, any data created or updated on the client will be lost.

---

## ***Setting up multiple users***

You can set up multiple users. Each user configuration has an associated set of synchronization settings. You can use multiple users to change between different configurations easily, or the user settings can be associated with different people. If you want to use more than one device, you should set up a separate user configuration for each device. Then select the appropriate user prior to synchronization.

### **To set up multiple users**

- 1** Select Synchronize | Options, then click the Users tab. Or you can choose Synchronize | Set User, and click New.
- 2** Use the setup wizard to select the synchronization preferences for that user.

To set up individual preferences for a user, select the user by choosing Synchronize | Set User, then choose Client | *Devicename* options and click the Preferences tab. Enter the desired information. For example, you can enter different Owner Information.

When you synchronize, the TrueSync view uses the settings for the current user.

### **To set the current user**

- 1** Choose Synchronize | Set User.
- 2** Select a user name from the list.

---

## ***Using TrueSync Plus for REX***

If you install TrueSync Plus for REX, you can use the TrueSync view to synchronize information directly from any of the following popular organizers:

- ◆ Microsoft Outlook 97 and Outlook 98
- ◆ Microsoft Schedule+ 7.0, 7.0a, 7.5
- ◆ Symantec's ACT! 3.0.6, 3.0.7, 3.0.8, and 4.0



- ◆ Lotus Organizer 97/GS (.or3 and .or4 file formats only)
- ◆ Starfish Sidekick
- ◆ Starfish TrueSync Information Manager
- ◆ Starfish TrueSync Desktop

If the version you are using is not listed here, check the Franklin Web site for updates at: <http://www.franklin.com/support/default.htm>.

TrueSync Plus for REX also supports the following devices:

- ◆ REX card
- ◆ REX PRO card
- ◆ Palm III and PalmPilot

**NOTE** The services that TrueSync Plus for REX supports will vary, depending on your setup. For further details, refer to the Readme file. To learn how to view the Readme, see page 10.

## *Getting started with TrueSync Plus*

The steps required for tasks such as initial TrueSync setup and selecting which data will be synchronized are the same as described previously in this chapter. To synchronize with one of the desktop applications above, you need only add it as a client.

## *Adding a client*

### **To add a client**

Choose Client | Add in the TrueSync view and select which type of client you want to add. The setup process walks you through the process of selecting the files or folders to synchronize.

**NOTE** Organizer and ACT! must be closed before you add them as clients. Outlook and Schedule+ must be open before you add them as clients.

You can add more clients at any time, and synchronize with multiple clients.

**NOTE** The field mapping described in “SmartMap™” on page 101 only applies when you are synchronizing Contacts categories on devices such as a REX card. If you are synchronizing two or more desktop applications or services, all available fields are synchronized, regardless of the field mapping level.

## *Changing a client*

### **To change a client's options**

Change the options for an application, service, or device by clicking the client's icon in the TrueSync window; by choosing Client | *ClientName* Options; or by right-clicking the client's icon and selecting Options from the shortcut menu. Then change the client's options as desired.

**NOTE** Be very cautious if you select one of the overwrite options for a desktop application such as Outlook.

## *Synchronizing multiple categories*

TrueSync Plus for REX supports multiple categories with the same name. For example, suppose that you have a file called Calendar in a folder named Personal, and another file called Calendar in a folder named Work. When you synchronize, one of those files will be renamed Calendar - Personal, and the other will be renamed Calendar - Work.

# Printing

TrueSync Desktop lets you print from the Contacts, Calendar, or Memos views to a variety of formats, using preprinted forms or your own custom ones. You can preview your output before you print it.

You can print the information in the Contacts view as cards, described in the following section, or as labels, address books, or envelopes using special formats.

You can easily print index cards to preprinted index card forms using the Print Labels command. See “Printing labels, address books, and envelopes” on page 110.

This chapter discusses

- ◆ Printing cards
- ◆ Printing labels, address books, and envelopes
- ◆ Printing calendars
- ◆ Printing memos

**NOTE** If you have multiple printers, you can select the printer you want using the File | Print Setup or File | Page Setup command.

---

## *Printing cards*

### To print the cards

In the Contacts view, choose File | Print | Cards. The Print Cards dialog box appears.



### *The Cards Per Page setting*

As you specify more cards per page, the cards themselves become smaller. If a card becomes too small to contain all its fields, TrueSync Desktop drops the extra fields from the bottom of the card. If you specify one card per page, TrueSync Desktop will drop fields as needed to make the card fit. If you choose Separate, each card will begin on a new page, but will not be restricted to fit on one page.

Select Continuous to print the cards one after another, without page breaks between cards.

---

## *Printing labels, address books, and envelopes*

TrueSync Desktop can print to almost any label, address book page, or envelope size. The dialog boxes for printing these forms include numbered steps to help you organize and print the information the way you need it. In addition, you can view special Hints screens that provide details on arranging the contents.

Templates let you print in a variety of popular label, index card, and address book formats. You can modify these or create your own templates.

## To print cardfile information to labels, address books, or envelopes

Choose File | Print, and select Labels, Address Book, or Envelopes. The corresponding dialog box appears; the Print Labels dialog box is shown in the example below.

Follow the numbered steps in the dialog box. Step 1 prompts you to specify the cards to print.

In Step 2, you determine placement of labels on the page. Click Set up to create or modify a template.

In Step 3, you specify what text, fields, or pictures to print. Choose previously created contents, or click Set up to define/modify contents.

In Step 4, you specify the number of copies and other options. See text for details.



Click to preview the results of your choices.

You can see the overall layout here as you work.

The numbered steps are designed to help you specify what to print and arrange it within the print area available. The procedures for using all three dialog boxes are the same, but involve different templates and content arrangements. These numbered steps are discussed in more detail below.

Once you have specified the information in the four steps, click Preview to see the result. Click Print when you are ready to print.

### ***Step One: Select cards to print***

This panel is where you specify the range of cards to print. If you mark or select cards before you begin printing, you can check Selected Cards or Marked cards for printing. Check Current Card to print only the currently displayed card.

### ***Step Two: Choose a printing style template***

The template is the format of your printed output, whether that is a label of a specific size and arrangement on a sheet, an address book page format, or a specific envelope.

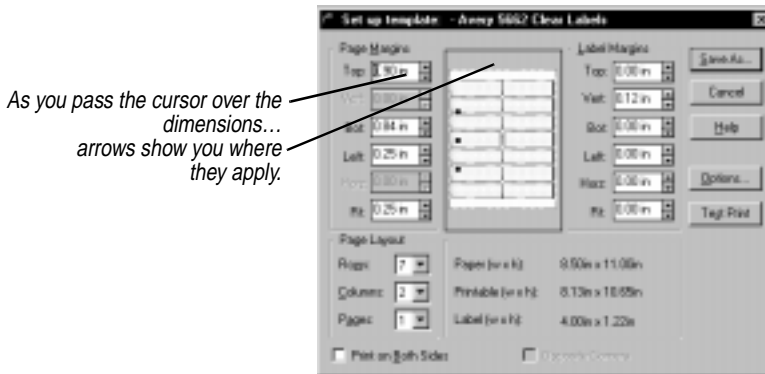
**NOTE** If you choose a template from the template list, you may need to adjust the margin settings to fit your printer's printing area. See your printer's manual for specific dimensions.

In most cases, you can simply click the down-arrow in the text window and choose a template from the list.

In addition, you can easily create a new template or modify an existing one.

### To create or modify a template

**1** In Step 2 of the Print dialog box (see page 111), open the dialog box shown below by clicking the Set up template button.



**2** Set the number of rows, columns, and pages to print per sheet of paper in the Page Layout group.

- ◆ **Rows.** The number of rows of labels on the sheet to which you are printing. Up to 60 rows are possible, depending on the size and margins specified.
- ◆ **Columns.** The number of columns of labels on the sheet to which you are printing. Up to four columns are possible, depending on the size and margins specified.
- ◆ **Pages.** The number of address book pages on each sheet of paper. Up to four pages are possible, depending on the size of the address book used. Each page has its own Index Tab, Page Number, and several address book entries. This setting does not apply to labels.

**3** Change the page margins if necessary.

**NOTE** Page margins are needed only for address books, which can print to multiple pages on the same sheet.

**4** Change the label margins settings if necessary.

Some margins might need to be set to the second decimal value for accuracy in printing to a specific label. The dimensions for the label size immediately reflect the change as you adjust the label margin settings.

- 5** If you select Print On Both Sides, click the Options button to display the Template Setup Options dialog box, where you can set several reverse-side printing options and specify the position of binder holes.
- 6** The Opposite Corners setting allows alignment of the binder holes to be adjusted by changing top and bottom margins. This setting is available when you select one of the vertical Pages options under Page Layout.
- 7** When you are finished, click Save As. To modify the existing template, save your changes under the original name. To create a new template, type a new name and click OK.
- 8** Click Test Print to see a printed example of the effect of your changes.

Because template definitions are saved with each cardfile, the changes you make only apply to the current cardfile's templates.

Template settings may be different for different printers. Experiment with your printer to find the best results.

 **TIP**

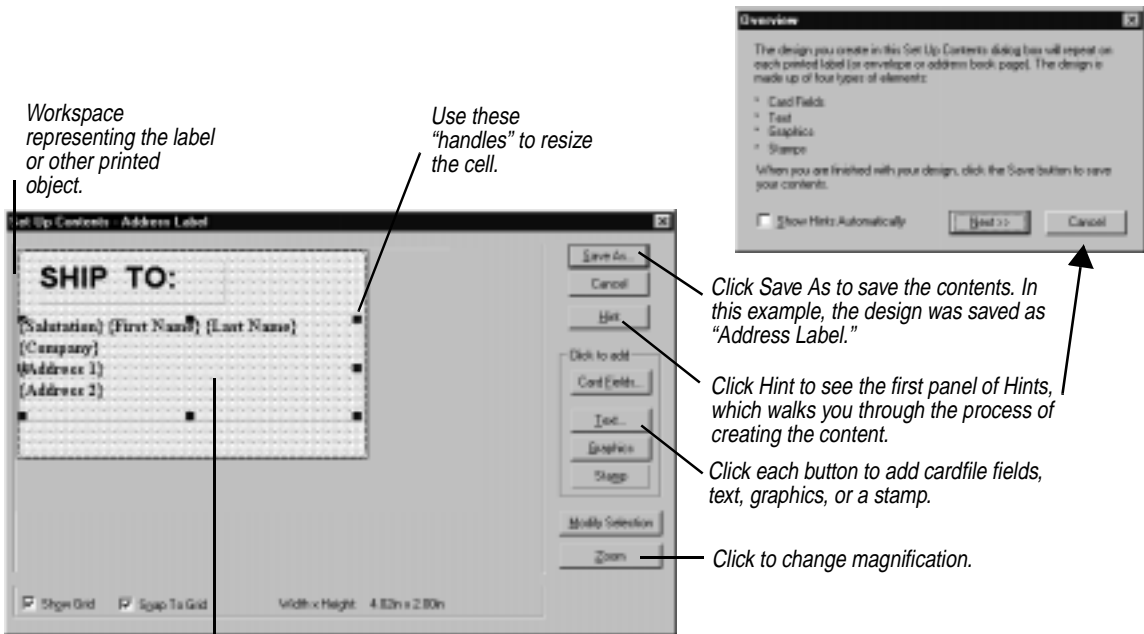
If you extract a card from a cardfile, you create a new cardfile that includes the templates of the first cardfile.

***Step Three:  
Choose contents to  
print***

Here you specify just what appears in the printed result, including text, Cardfile fields, and graphics. If you have predefined contents, you can click the down-arrow and choose from the list.

**To set up the contents**

- 1** Click the Set Up Contents button in the Print dialog box.
- 2** The panel that appears contains a green shaded workspace representing one label (or envelope, or address book page) for creating the contents. For an element to print in a label, you must position it within this shaded area (not within the background rectangle). Any elements you add to this contents design repeat on each label you print.



Workspace representing the label or other printed object.

Use these "handles" to resize the cell.

Click Save As to save the contents. In this example, the design was saved as "Address Label."

Click Hint to see the first panel of Hints, which walks you through the process of creating the content.

Click each button to add cardfile fields, text, graphics, or a stamp.

Click to change magnification.

Right-click a cell to edit it or change its properties. Or click it and then click the Modify Selection button.

Different fonts are used in the two cells in this example. One cell contains "Ship To" in a large font, and the other contains the name and address fields in a smaller font.

**3** Each element, such as a group of fields or a graphic image, is contained in a "cell" that can be sized and moved within the workspace. In the figure above, the cell containing address information occupies the entire label area.

When you click a cell, black squares, called "handles," appear in each corner that you can drag to resize the cell. To move the cell, drag it to the location you want.

To change font, alignment, and colors, or to edit the contents of the cell, right-click it. Font, alignment and color attributes are unique to each cell, allowing you to have several different styles in different cells on the same label.

**4** When you are finished, click Save As to save your changes. Type a new name if you want to create a new contents design.

Since contents design definitions are saved with each cardfile, the changes you make only apply to this cardfile's contents designs.

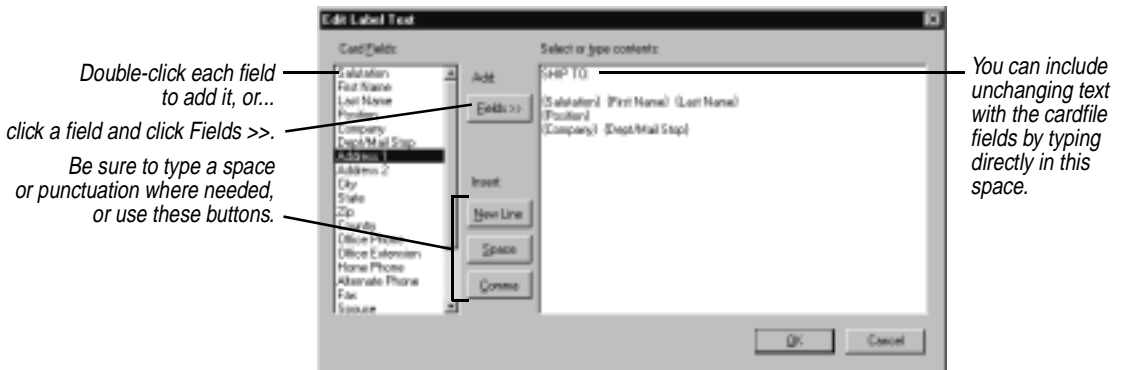


The content can consist of the following types of text:

- ◆ Card field text (like a person's name or address, that prints a different card's information on each new label)
- ◆ Unchanging text (such as "Greetings!" or "Ship To:" that prints on each label, or your return address for an envelope)

### ***Card fields***

The Card Fields button lets you insert fields from the cardfile into the cell. The fields will be filled in with data from the card or cards you select.



This dialog box makes it convenient to insert fields in the label, although you can enter the field names manually, either here or in the Text dialog box.

### ***Text elements***

Use the Text button when you have a lot of unchanging text that prints on every item, such as your return address on an envelope.





## TIP

You can add multiple text elements with unique fonts, colors, and alignment.

Type whatever text you want the text cell to contain. Any text you type is repeated on each label.

When you are finished, click OK. A new cell appears. By right-clicking the cell you can change the font, color, and alignment, change the text and delete the element.

### *Stamp elements*

A number of ready-made phrases such as “1st Class,” “Urgent,” and “Confidential” are available as *stamps*. Click the Stamp button, select the phrase you want, and a new text cell containing that text appears. By right-clicking a Stamp cell you can change its message and font, rotate it, or delete it.

### *Graphic elements*

Clicking the Graphic button displays four choices:

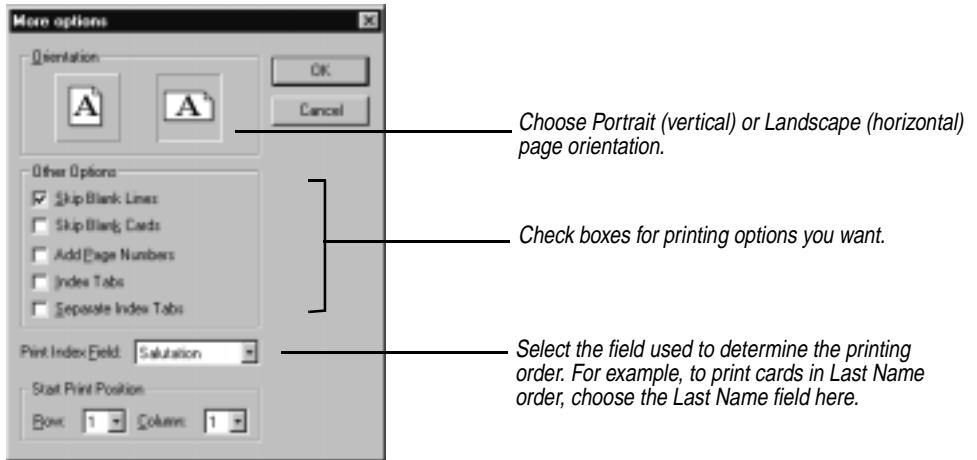
- ◆ **Bitmap** lets you choose a .BMP file to import.
- ◆ **Frame** creates a rectangle.
- ◆ **Round Frame** creates a rectangle with rounded corners.
- ◆ **Line** gives you the choice of creating a horizontal or vertical line.

Right-click the graphic cell to see a menu of its properties you can change.

## *Step Four: Select printing options*

The options let you specify quantity to print and other settings. Two repeat options are available: Repeat Entire Set prints the entire set once and then starts over, for the number of times you specify. Repeat Each Card prints each card for the number of times specified before going on to print the next card.

The additional choices available with the More Options button are shown in the following figure.



For envelope printing, the More Options button lets you select the feed and orientation of envelopes in your printer, plus options for skipping blanks and setting margins.

---

## *Calendar printing*

You can print events, calls, and tasks from your calendar in a variety of formats. TrueSync Desktop can print the daily, weekly, monthly, and yearly calendars in its own format using preprinted or standard paper

**NOTE** If there are last-minute changes or additions to TrueSync Desktop or TrueSync Plus for REX, they are documented in a Readme file. To learn how to view this file, see "The Readme file" on page 10.

In addition, TrueSync Desktop can print to the paper forms of several popular organizers:

- ◆ At-A-Glance dated or undated daily, weekly, and monthly forms
- ◆ Day-Timer daily organizer forms
- ◆ Franklin-Covey Planner daily organizer forms
- ◆ Day Runner dated or undated daily, weekly, and monthly forms
- ◆ Filofax weekly and monthly formats

## *Printing in the daily format*

Using the TrueSync Desktop format, you can print on any size paper or personal organizer. You can use special preprinted paper or you can create your own organizer using standard blank paper.

- 1 Choose File | Print | TrueSync Desktop Daily Format from the Daily view of the Calendar. The Print TrueSync Desktop Daily Format dialog box appears.



- 2 Change the dates in the From and To boxes if you want to print a series of days. The default date is whatever day you had selected in the Calendar.
- 3 In the Style group, choose the number of columns per page that you want to print.
- 4 Choose the type of activity you want to appear in each column from the drop-down lists in the Contents In Columns group. If you pick the same activity for more than one column, text flows continuously from the bottom of one column to the top of the next.
- 5 Select the paper type that corresponds to the paper you are printing to. TrueSync Desktop can print to a number of popular laser forms by Day Runner, Day-Timer, and Franklin-Covey. If you need to change any of the settings, click the Edit button. The Paper Setup dialog box appears.

Edit, add, or delete paper types in this dialog box. You can print the TrueSync Desktop format to almost any size of blank organizer paper by adjusting the margins accordingly. When you are finished, click Change, and then click Close to return to the Print TrueSync Desktop Daily Format dialog box.

- 6 Click the Options button to expand the dialog box and choose from the following options for your printout.
  - ◆ **Include Mini-Calendar.** Prints current month calendar at the top of the page. The previous and next month calendar grids are also printed, when space allows.
  - ◆ **Include Regarding.** Prints any Regarding notes attached to activities.
  - ◆ **Include Completed Items.** Prints all entries from the selected lists, including those checked-off as completed.
  - ◆ **Skip Empty.** Prints only those lines from the Appointments, Calls, or To Do list containing data; all blank lines between entries are omitted.
  - ◆ **Text Wrap.** Prints the entire description of an activity (up to 500 characters). If necessary, the text wraps to additional lines.
  - ◆ **One Page.** Truncates the schedule and prints only what can fit on a single page. Changing the start and end times or time increments for the Appointments list on the daily schedule or choosing Skip Empty can help shorten the printed material.

**NOTE** Be prepared to experiment with the settings to achieve the results you need for your paper type and printer.

- 7 If you want, you can change the print fonts for the calendar by clicking the Font button, available when the Options button is clicked. You can choose a different font for each part of the calendar.
- 8 Choose OK to print the calendar.

The activities print just as they appear in the Daily view of the calendar. Their descriptions, time increments, durations of appointments, alarms, and other displayed information are all printed.

### *Printing in the different formats*

In addition to the Daily view formats, TrueSync Desktop can print in several different calendar formats, including one-, two-, and six-week, monthly and yearly calendars.

- 1 Change to the view (Weekly, Monthly, or Yearly) that you want to print.
- 2 Choose File | Print and select the format and date range you want.

- 3** Set any other options you want to print, including a title, footer, mini-calendar, today's date, or graphic images. (If you want to add graphic images, they must be black-and-white .PCX files; store them in the TrueSync Desktop data folder.) Adjust the margin settings as necessary.
- 4** Change the fonts for the calendar by clicking the Fonts button. You can choose a different font for each part of the calendar.
- 5** Choose Setup to change the orientation or the page size for the printer.
- 6** Choose OK to print the calendar.

### ***At-A-Glance forms***

TrueSync Desktop can print directly to pages in At-A-Glance organizer format (in Portrait orientation only). The pages from the notebook must be fed through the printer.

- 1** Choose the Calendar view: Daily, Weekly, or Monthly.
- 2** Choose File | Print and then At-A-Glance format from the menu.
- 3** Select one of the At-A-Glance formats from the Format list in the Print dialog box.
- 4** Experiment with the Origin settings if the printed text does not match the lines on the page. (You can print a test draft on a blank sheet of paper and compare the output to the At-A-Glance sheet to make sure that the text and lines match.)
- 5** For Daily view, specify whether you want printing to start on the Left page or Right page. For Weekly or Monthly views, specify the paper you are printing on—dated or non-dated.
- 6** If you want, you can change the font by clicking the Font button. A point size of 8 or 9 works best with the available space.
- 7** Choose the range of dates to print, and choose OK.

### ***Day-Timer and Franklin-Covey forms***

TrueSync Desktop can print directly to pages from the Day-Timer and Franklin-Covey Planner personal organizer notebooks. The pages from the notebook must be fed through the printer.

- 1** From the Daily view of the Calendar, choose File | Print and then Day-Timer Daily Format or Franklin-Covey Daily Format from the cascading menu.
- 2** Select a Day-Timer or Franklin-Covey format from those listed in the Print dialog box.

- 3 Experiment with the margin settings if the printed text does not match the lines on the page. (You can print a test draft on a blank sheet of paper and compare the output to the Day-Timer or Franklin-Covey sheet to make sure that the text and lines match.)
- 4 If you want, you can change the font by clicking the Font button. A point size of 8 or 9 works best with the available space.
- 5 Choose the range of days to print, and choose OK.

TrueSync Desktop prints on the forms as though they are being center-fed into the printer. If your printer does not feed smaller (less than 8.5 x 11) sizes of paper centered, adjust the margin settings to accommodate your printer. You can use negative numbers in the margin settings, if necessary.

## ***Day Runner and Filofax forms***

TrueSync Desktop can print directly to pages from the Day Runner and Filofax personal organizer notebooks. Both dated and undated versions of a variety of Day Runner forms can be used. The pages from the notebook must be fed through the printer.

- 1 Change to the view that you want to print (Daily, Weekly, or Monthly for Day Runner, and Weekly or Monthly for Filofax) and choose File | Print. Choose Day Runner Format or Filofax Format. The Print Day Runner or Print Filofax dialog box appears.
- 2 For Day Runner only, select a format from the Format list, and choose Dated or Non-dated, depending on the paper you are printing to.
- 3 Adjust the page origin settings if the printed text does not match the lines on the page. (You can print a test draft to a blank sheet of paper and compare the output to the Day Runner or Filofax sheet to make sure that the text and lines match.)
- 4 Change the fonts for the calendar by clicking the Fonts button. You can choose a different font for each part of the form.
- 5 Choose the date range you want to print. The default is the range currently displayed in that view.
- 6 When ready, choose OK to print the calendar.

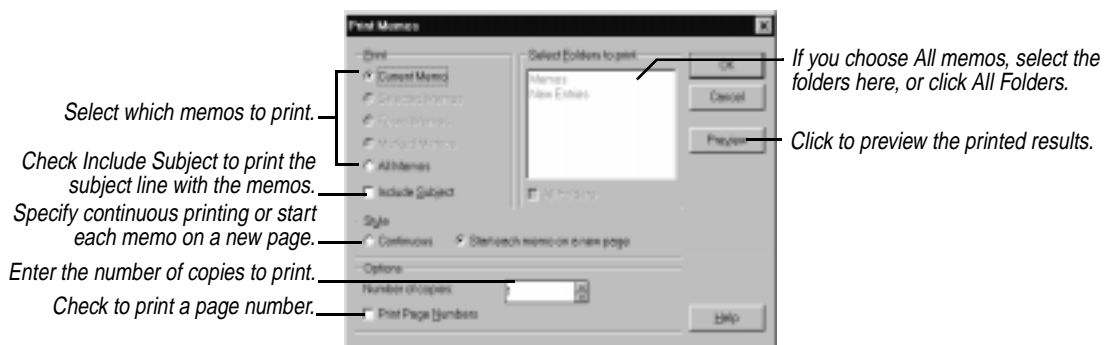
---

## ***Printing in the Memos view***

You can print a single memo, all of the memos filed in specific folders, selected memos, marked memos, or found memos listed in the Found window.

## To print your memos

Choose File | Print from the Memos view, or click the Print button on the Memos Toolbar. The Print Memos dialog box appears.





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