

Palmeta Mail v1.5

User's Guide

Version 1.5 Beta 3
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Introduction

Palmeta Mail is a software product that enables users of the US Robotics Pilot hand held organizer to send and receive electronic mail.

Technically, Palmeta Mail is a "HotSync conduit". It replaces the software component on your Windows 95 workstation that Pilot Desktop 1.0 uses to HotSync your Memo Pad data. In addition to the normal Memo Pad operation, the Palmeta Mail conduit transfers email messages between your Memo Pad and Microsoft Exchange when you HotSync.

This User's Guide will help you install and use Palmeta Mail. Please take a few minutes to look through the Guide. If you're in a hurry, please note that the installation process requires a couple of steps you might not expect, so please at least review the section on Installing.

Thank you for buying Palmeta Mail!

Contacting Palmeta Software

For technical questions, you can reach us at support@palmeta.com on the Internet.

Sales and marketing questions, and questions about the status of an order, should be directed to sales@palmeta.com.

Please visit our home page at www.palmeta.com for more information on Palmeta products.

Orders for Palmeta Mail should be sent to:

Palmeta Software
PO Box 1177
Londonderry, NH 03053-1177 USA

You can fax a credit card order to 603-432-9242.

An order form is included in the kit in the file "order.txt", or you can download one from our web site.

System Requirements

Palmeta Mail requires a Windows 95 PC with Pilot Desktop v1.0 and a Pilot HotSync cradle installed.

You must also have an electronic mail system installed and working on your PC. This version of Palmeta mail supports either:

1. A MAPI compatible mail system. The most popular choice available today is Microsoft Exchange, which is provided as a part of Windows 95. Palmeta Mail also works with Eudora Pro v3.x; see below for details, or...
2. Netscape Navigator 3.x or Navigator Gold 3.x.

Palmeta Mail and Microsoft Exchange

To send and receive mail across the Internet you will need Microsoft's Internet Mail extension for Microsoft Exchange. This is not included with Windows 95, but it is available for no charge at many places on the World Wide Web, including Microsoft's official download site at:
www.microsoft.com/windows/software/inetmail.htm

The Internet Mail extension is also available as part of Microsoft Plus, a companion CD for Windows 95.

Palmeta Mail works with many existing Exchange-compatible email systems, including Microsoft Mail, Microsoft Fax, Microsoft Internet Mail (available on the Microsoft Plus CD), and Lotus Notes v4. (Other MAPI service providers probably work, too, but we haven't tested them yet.)

Please see the section titled "Using Palmeta Mail with Microsoft Exchange" for more details on setting up Exchange to work with Palmeta Mail.

Microsoft has released an update to Microsoft Exchange in which the product is renamed to "Windows Messaging". We'll use "Exchange" in this document to mean either version.

Palmeta Mail and Eudora Pro

Palmeta Mail works with Eudora Pro v3.0, which at the time of this writing is in Beta and will ship in November, 1996.

Users of Eudora Pro v2.2 can send mail from the Pilot using Palmeta Mail, but this version of Eudora does not support transferring mail to the Pilot.

Versions of Eudora Pro before v2.2 do not support MAPI and therefore will not work with Palmeta Mail. Neither does the Eudora Light product line.

Palmeta Mail and Netscape Navigator 3.0

Palmeta Mail also works with Netscape Communications' Netscape Navigator 3.0.

Installation

From a diskette

If you have purchased an installation diskette from Palmeta Software, you can install the product by inserting the diskette in your diskette drive (let's assume it's drive A:) and running the SETUP.EXE program on the diskette. Here's a step-by-step description of the process:

1. Click on the Windows 95 Start Menu
2. Select the Run command
3. Type "a:setup:" (without the quotes!)
4. Press Enter, and the InstallShield Wizard will guide you through the installation process.

Important: Palmeta Mail will not work until you finish the installation by completing the two steps below once the Setup program finishes!

5. Run the Palmeta Mail program to complete the installation process and select options for mail transfer. Also, **Register your serial number** at this time to disengage the restrictions on the Evaluation copy. See the section on Registering for details.
6. Terminate and restart the HotSync program to make it aware of Palmeta Mail. You can either press Alt+Tab until the HotSync program appears, then select Options Exit, then restart HotSync from the Program menu, or simply restart Windows 95.

Once you've installed Palmeta Mail, it will transfer your mail for you every time you HotSync.

From the Internet

If you have downloaded a 30-day evaluation copy of the product from our home page at www.palmeta.com, you can unzip the files to a temporary directory and run the SETUP program from the temporary directory. Follow the instructions given above to install the product.

You can use the product on an evaluation basis for no charge for 30 days, subject to the license agreement. Usage after thirty days requires that you purchase a registered copy.

Uninstalling Palmeta Mail

Important Uninstall Instructions: Should you ever choose to uninstall Palmeta Mail, you must perform one action before running the Windows Uninstall from the Add/Remove Programs Control Panel:

Before you uninstall Palmeta Mail, you must run the Palmeta Mail program and deselect both the “Send outgoing mail” and “Receive incoming mail” options.

This will give Palmeta Mail the opportunity to correctly remove itself from your PC’s System Registry and keep all your other Pilot conduits working correctly.

If you do not follow these instructions, your Memo Pad will not Hot Sync to the PC after the uninstall. To fix this, simply reinstall Palmeta Mail, run the Palmeta Mail program, deselect the two options as detailed above, then uninstall from the Add/Remove Programs Control Panel. Your Memo Pad will HotSync correctly after you follow these steps.

Configuring Palmeta Mail

When you run the Palmeta Mail configuration program, you will see the Palmeta Mail Configuration dialog, which allows you to select configuration options. Select the options you want, then click OK. To exit the program without changing any options, press Cancel.

Details on each of the option settings are provided below.

Mail System Selection

This section allows you to select which mail system Palmeta Mail will use to deliver your mail. You can choose “Use Microsoft Exchange or Eudora Pro (MAPI) mail” to use any MAPI email service, or “Use Netscape 3.x Mail” to use Netscape Navigator mail.

Certain receive options are not available in both mail systems. The options which are not available for use with your current Mail System Selection are dimmed and cannot be selected with the mouse.

Options for sending mail from the Pilot

Send outgoing mail

This option allows you to turn the transfer of outgoing mail from the Pilot to your PC on or off.

Move sent messages to Sent category

If this option is checked, any messages successfully transferred from the Outgoing Mail category to your PC will be moved to the Sent Mail category on the Pilot.

Options for receiving mail on the Pilot

Receive incoming mail

This option allows you to turn the transfer of incoming mail to the Pilot on or off.

Show sender's name in headline

This option gives you control over the format of the headline of the message in the Pilot Incoming Mail category. With this option checked, a message from "Joe Smith" with a subject of "Lunch plans" would have the headline:

Joe Smith: Lunch plans

With this option turned off, the headline would look like this:

Lunch plans

Only transfer unread messages

Checking this option causes Palmeta Mail only to transfer messages that are marked as Unread on your PC.

Note for Lotus Notes users: This option works with Notes, but there is a caveat. We have seen situations where Notes and Exchange don't agree on the Unread status of a message. Palmeta Mail can only see Exchange's opinion of the unread status of a message. If you are using this option to control which messages are downloaded to your Pilot, and you get unexpected results, check the Unread status in Exchange.

Only transfer messages received since last Sync

Checking this option causes Palmeta Mail to scan the Inbox on your PC for messages received after the last HotSync. Use this option to avoid downloading the same message twice.

Maximum number of messages to transfer per HotSync

This option allows you to limit the number of messages that will be transferred in any one HotSync.

Note to Evaluation users: the Evaluation version of Palmeta Mail transfers only a limited number of message to and from the Pilot per HotSync. When you purchase a registered copy, this restriction is removed.

Options for MAPI mail systems (MS Exchange, Eudora Pro 3.0, ...)

Use current Exchange session

If you are using Microsoft Exchange, you can bypass the "Choose Profile" dialog by checking this option. Palmeta Mail will use the currently-opened Exchange session instead of asking Exchange to prompt for a profile selection. **Note: You must have Exchange running on your PC when you HotSync for this option to work. If you do not, you will get this error in your HotSync log:**

Palmeta Mail: MAPI Logon canceled, or Exchange not running

With this option turned off, Exchange will pop up the Choose Profile dialog to ask for a profile selection in the usual way.

This option replaces the "Use default Exchange profile" option provided in earlier versions of Palmeta Mail. Many users reported problems with certain versions of Exchange and Windows Messaging. Due to

the proliferation of versions of Exchange, we have modified this option to attempt to provide the most utility to the largest number of users. We apologize if this change causes inconvenience.

Force download of new mail

Checking this option causes Palmeta Mail to request the PC mail system to check for new mail before transferring incoming messages.

Note: If you are connected to your mail server using dialup telephone access, we don't recommend that you use this option, since your HotSync is likely to time out while the telephone connection is being established.

Mark transferred messages as having been read

Checking this option causes Palmeta Mail to mark any message it transfers to the Pilot as "having been read" on the PC.

Note for Lotus Notes users: Due to technical limitations, this option does not work with Notes. Palmeta Mail ignores this option setting when syncing with Notes.

Options for Netscape Mail

Only transfer flagged messages

Netscape Navigator's Mail window has two columns of buttons that allow you to control attribute settings for each message. They are the columns in the top right hand pane under the headings with the small red flag and the green diamond. Clicking in the red flag column next to a message allows you to mark or "flag" the message for your future attention. The "Only transfer flagged messages" option tells Palmeta Mail to transfer to the Pilot only those messages which have a red flag showing. (The green diamond works in a similar way for read/unread messages.)

Transfer contents of folder...

Palmeta Mail will transfer messages from the folder whose name appears in this text box. By default, this is the "Inbox" folder, but you can set up a separate folder for your Pilot mail and direct Palmeta Mail to transfer only messages from that folder by changing the name here. The "Only unread", "Only since last sync", and "Only flagged" options are used to filter which messages from the indicated folder are transferred to the Pilot.

Pilot category names

Incoming mail

Enter the name of the Memo Pad category that you want your incoming mail from the PC delivered to. The default is "Inbox".

Outgoing mail

Enter the name of the Memo Pad category that you want your outgoing mail sent from. The default is "Outbox".

Sent mail

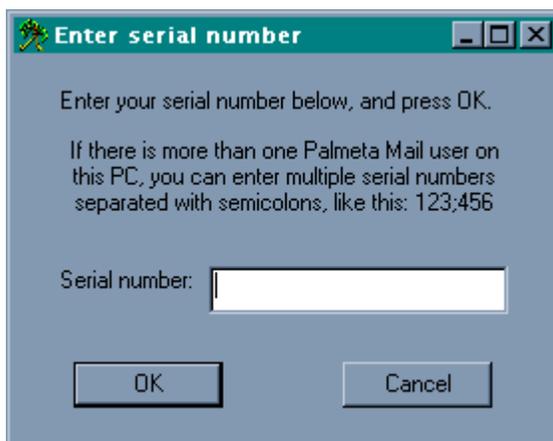
Enter the name of the Memo pad category that you want outgoing messages moved to once they have been successfully sent. The default is "Sent".

Registering your copy of Palmeta Mail

When Palmeta Mail is first installed, it starts in Evaluation mode, in which certain limitations are in effect. When you purchase a copy, you can enter the serial number provided with your product diskette and continue using Palmeta Mail without reinstalling.

Palmeta Mail allows any number of users to use the product on an Evaluation basis for thirty days. After thirty days, only registered users who have entered their serial number will be able to use Palmeta Mail.

To register your copy, press the Register button in the Palmeta Mail program. You will see this dialog:



Enter the serial number provided with your product diskette, and click OK. The Evaluation copy restrictions will no longer be in effect.

Multiple Mail Users on a Single PC

You can register multiple users by typing multiple serial numbers into the “Enter serial number” dialog. Just separate the numbers with semicolons, like this:

123456;234567

No additional punctuation or spacing, please.

The number of users is limited only by the length of the serial number string, which must be less than 255 characters. At about eleven characters per serial number, you should expect to have no problems registering up to twenty users on a single PC.

Use of Palmeta Mail is governed by a license agreement. See the file “license.doc” for details.

Sending and Receiving Messages

For Palmeta Mail to work correctly, you must set up categories named "Inbox", "Outbox", and "Sent" on your Pilot's Memo Pad (or the substitute names you specified in the configuration program). Use the "Edit Categories..." command on the Pilot to add these new category names. You can specify different names for these categories using the Palmeta Mail Settings program, which is installed in the Palmeta Mail folder.

When you HotSync, Palmeta Mail sends any Memo Pad items in the Outbox category to your PC's mail program. If you're using Microsoft Exchange, you can control which mail delivery services are used to send your outgoing mail by selecting an Exchange Profile when you are prompted during the HotSync. More on this below.

Your incoming mail is automatically split into parts based on the maximum size of a Memo Pad item. While you are reading a memo and reach the end of a part, you can just press the scroll-down button to continue to the next part (Pilot's cool feature, not ours).

Palmeta Mail also copies messages from your mail system's Inbox to the Inbox category in your Pilot's Memo Pad during the HotSync. You can control which messages will be copied using the Palmeta Mail Configuration program.

Formatting messages

Outgoing messages need to be in a special format to be sent correctly. You supply the addresses of the message's recipients on lines beginning with "To:", "cc:", or "bcc:". If you want the message to have a subject tag, you must also enter a line beginning with "Subject:". Follow this message header with the body of the message.

Here's an example:

```
To: Palmeta  
cc: Joe; Fred  
Subject: Love this new Palmeta Mail
```

```
Just a quick note to tell you guys at Palmeta how easy it was to get  
set up with the evaluation version of your new product. Love it! Keep  
up the good work.  
-brad
```

If you're using Microsoft Exchange to deliver your mail, the addressees "Palmeta" and "Joe" in the example above must be set up in the Exchange Address Book for the mail to be delivered successfully. See the section titled "Using Palmeta Mail with Microsoft Exchange" for some addressing shortcuts.

You can specify multiple addresses on a single line by separating them with semicolons, as in the example above.

Using Palmeta Mail with Microsoft Exchange

Setting up Exchange Profiles

Once you have installed Palmeta Mail, the behavior of HotSync changes a little. When your HotSync session gets to the "Synchronizing the Memo Pad" stage, the Microsoft Exchange "Choose Profile" dialog will appear. At this point you can select the profile you have configured to connect to your normal email provider, or configure a new profile to connect to a provider you haven't used before.

Profiles contain the basic information about the configuration you need to send data to a particular set of service providers. One provider that may be of particular interest to Palmeta Mail users is the Internet Mail service, which allows you to use the Pilot to send mail via Palmeta Mail and Exchange across the global Internet. To set up the Internet Mail service, see the Windows 95 Help topic "About the Internet Features in Microsoft Plus".

How can I avoid pressing OK at the Exchange Choose Profile dialog every time I HotSync?

You can avoid the Choose Profile dialog by using "Use current Exchange profile" option. With this option turned on, Palmeta Mail will use the currently running Exchange session on your PC to transfer mail. **Note: for this option to work, you must have Exchange running when you HotSync. If Exchange is not running at the time you HotSync, you will get this error in the HotSync log:**

Palmeta Mail: MAPI Logon canceled, or Exchange not running

As an alternative, you can install a shareware button-pusher to press the OK button for you. We have used RTVReco with success. You can get RTVReco from the Automation Tools section of the shareware archives at www.windows95.com.

The "Use current Exchange profile" option supersedes the "Use default Exchange profile" option that was available in earlier versions of Palmeta Mail.

I get the error "MAPI Logon canceled, or Exchange not running". What's happening?

See the item above.

Addressing Internet mail

For Internet mail, you can sidestep the Exchange address setup using the special [SMTP:] form of addressing, like this:

To: [SMTP:support@palmeta.com]
Subject: Love this new.....

Addressing a Fax

If your modem can send and receive faxes, you can send faxes, too. Include the Microsoft Fax service in the Microsoft Exchange profile you intend to use, and address your outgoing fax like this:

To: [FAX:800-555-1212]

Subject: Love this new...

Using Palmeta Mail with Eudora Pro v2.2 or later

Palmeta Mail also works with Eudora Pro v3.0, which at the time of this writing is in Beta and will ship in November, 1996.

Users of Eudora Pro v2.2 can send mail from the Pilot using Palmeta Mail, but this version of Eudora does not support transferring mail to the Pilot.

Versions of Eudora Pro before v2.2 do not support MAPI and therefore will not work with Palmeta Mail. Neither does the Eudora Light product line.

One issue we have heard about is that some users have reported problems turning on the MAPI server feature in Eudora. The error says that MAPI.DLL and MAPI32.DLL are in use by another program. If this happens, restart Windows 95 and run Eudora Pro before starting any other applications; then in Tools / Options/ MAPI turn on the MAPI server. There is a detailed explanation in the Eudora Pro User's Guide.

Using Palmeta Mail with Lotus Notes v4

We have tested Palmeta Mail with Notes v4.0 and v4.1 in conjunction with Microsoft Exchange. Earlier versions of Notes do not support MAPI, so they don't work with MS Exchange.

Is there any way to avoid the Notes password dialog?

Sorry, we don't know of any way to avoid entering your password. You can, however, have a shareware program do it for you. See the Windows 95 Shareware Archive at www.windows95.com for a comprehensive list of automation tools. We've tried "Webpass" with success. Do consider, however, that automatically entering your password creates a security risk if your machine should fall into the wrong hands.

I get the error "Unable to open Mail File Database" when I sync with Notes. What is going on?

When Exchange logs into Notes to transfer mail, it uses the last File Mobile Location setting you used in Notes. If you have a portable computer that you use in different locations with different server connections (e.g., network in one place, modem in another) you must start up Notes when you switch locations and select the File Mobile Location setup for your current location.

I'm getting strange results using the "Only transfer unread messages" option. What's going on?

This option works with Notes, but there is a caveat. We have seen situations where Notes and Exchange don't agree on the Unread status of a message. Palmeta Mail can only see Exchange's opinion of the unread status of a message. If you are using this option to control which messages are downloaded to your Pilot, and you get unexpected results, check the Unread status in Exchange.

The "Mark transferred messages as having been read" option doesn't seem to work with Notes. What's going on?

Due to technical limitations, this option does not work with Notes. Palmeta Mail ignores this option setting when syncing with Notes.

I'm still having problems with Lotus Notes...

Other setup problems we have seen:

1. Open the Windows 95 Control Panel and select "Mail and Fax" (it may be simply "Mail" on your system). Point to Lotus Notes Mail (you may have to click Show Profiles) and click Properties. Click the Delivery tab. Make sure that the "Deliver new mail to the following location" is set to "Lotus Notes Message Store".
2. Also in the Delivery tab, verify that the "Recipient addresses..." list has "Lotus Notes Transport" as its first item. If not, make it so.
3. Also, in the Mail and Fax control panel, click on the name of a profile that has Lotus Notes included, and choose Properties. Select "Lotus Notes Mail", and choose Properties again. Check the Mail File Path

to make sure it corresponds to your current Notes setup. If the Mail File Path says something like “MyServer!!mail\JSmith.NSF”, you must have a network connection to MyServer for Exchange to be able to transfer your mail. If you are not on a LAN, check your File Mobile Location setting as described above. Also, ensure that the Address Book points to an address book that you can use, usually “names.nsf”.

Using Palmeta Mail with Netscape Navigator 3.x

Palmeta Mail transfers mail to the Pilot from the selected Netscape Mail folder. When you send messages from your Pilot, Palmeta Mail transfers the messages to your Netscape Outbox folder.

To deliver the messages, start up Netscape Navigator and connect to your mail system in the usual way, then select the Netscape File / Send messages in Outbox command and your mail will be delivered.

Frequently Asked Questions

Where can I get the latest information on Palmeta Mail?

See the Frequently Asked Questions page on our web site at www.palmeta.com for the most complete and up-to-date information on Palmeta Mail.

It's not working. What should I do?

If you're using Exchange, the first thing to do is to **make sure that Microsoft Exchange is set up** to send and receive mail correctly. There's lots of helpful information on configuring Exchange at Slipstick's Exchange Center at www.slipstick.com.

1. **Check the HotSync log** to see if there are any diagnostic messages in there. The HotSync log is located in the subdirectory under the \pilot directory corresponding to your user name. For example, Joe Smith's HotSync log would be in \pilot\JSmith.
2. Also, please check for **diagnostic messages in your Pilot's Inbox** with a heading of "Palmeta Mail".
3. **Make sure your Pilot's memory isn't full.**
4. **Verify the address** you entered on an outgoing message is correctly entered in the Exchange address book.
5. If you're still having problems, **send us mail** at support@palmeta.com and we'll try to help.

What if I don't want to transfer mail, just HotSync my other Pilot databases?

You can press Cancel at the Exchange login box and the rest of your HotSync will proceed normally. If you are using Netscape Mail, you'll need to turn off both "Send mail" and "Receive mail" to get the same result.

Egad! I have 473 memos in my Inbox. How am I ever going to get rid of them all?

Use the Pilot Desktop Memo Pad application: **Make sure the Inbox category is selected!!!** Edit Select All, then Edit Delete. Then HotSync, and Cancel at the Exchange login prompt (to avoid transferring mail). Your Inbox will be emptied. **Caution! If you have "All" categories selected this will delete all your Memo Pad items, not just the Inbox items!**

I HotSync with two computers. How come Palmeta Mail doesn't transfer my mail until the second time I HotSync when I switch from one computer to another?

Palmeta Mail only transfers mail during what is called a "FastSync". When you switch HotSync hosts, the HotSync software does a record by record "SlowSync" to ensure data consistency between the Pilot and the two desktop hosts. We don't participate in SlowSync, to allow the Pilot software to back up your Memo Pad database before we start pumping email into your Inbox. Just HotSync a second time and we'll transfer your mail.

Does Palmeta Mail work with Microsoft's Internet Mail service for Internet Explorer 3.0?

We're sorry, but the version of Microsoft Internet Mail that works with IE 3.0 does not support MAPI, so Palmeta Mail can't talk to it.

How can I use Palmeta Mail with my Win 3.1 / Windows for Workgroups machine?

Palmeta Mail requires Microsoft Exchange, which comes with Windows 95. You'll have to upgrade to Windows 95 to use our product.

Configuring and Translating Palmeta Mail

Palmeta Mail has been designed to make customization and translation into other languages as easy as possible. This section provides details on the “palmstr.ini” file, which contains all the text strings used by Palmeta Mail.

The palmstr.ini file can be found in the directory in which you installed Palmeta Mail. It is in standard Windows .INI file format. It contains the text strings that are used by Palmeta Mail to parse incoming messages, create outgoing messages, signal errors to the user, and so forth. Here is an excerpt of the US English version:

```
; PALMSTR.INI
;
; Text strings for Palmeta Mail
;
;
; Entries in the Strings section must be no more than
; 50 characters long.
;
[Strings]
1=Outbox
2=Inbox
3=Sent
4=To:
5=Subject:
6=Re:
7=cc:
8=bcc:
9=Date:
10=From:
11=Part:
12= [%d of %d]
13=<< No message text. >>
14=<<Remaining recipients deleted. >>
15=<< No subject. >>
16=<< No From: data. >>
```

This section shows the [Strings] section of the file. As you can see, each entry in the file has a number, an equals sign, and a text string. The text string contains the text that Palmeta Mail will use.

There are five sections to the palmstr.ini file.

The [Strings] Section

The section marked [Strings] contains text that is used for parsing and creating messages. You can customize this section to suit your preferences for how your received mail should look, and how you will compose messages on the Pilot. For example, if you would prefer to start the subject line of a message with “Sub:” or “S:” for brevity’s sake, you can change string #5 in this section and Palmeta Mail will recognize the new entry instead of “Subject:” as the subject line tag.

String #12 in this section is special. It specifies how the header for multi-part messages will be formatted. These are the [1 of 3], [2 of 3], [3 of 3] strings that are appended to the message headline. You must put two ‘%d’ entries in this string; they are replaced by the part number and total number of parts.

The strings that end with the colon character ‘:’ are special. If you change them, be sure that the new strings end with the same punctuation, or Palmeta Mail may behave unpredictably.

Also, please note that entries in the Strings section are limited to 50 characters (bytes) in length.

[Mail]

The [Mail] section contains the text of error messages that are generated by Palmeta Mail in the course of its operation.

[Setup]

The [Setup] section contains the strings used in the user setup dialogs of the Palmeta Mail program.

[MAPI]

The [MAPI] section contains the text of the error messages corresponding to error codes returned by your MAPI mail service.

[HotSync]

The [HotSync] section contains the text of the error messages corresponding to error codes returned by the US Robotics Pilot HotSync program.

[Months]

The [Months] section contains the abbreviations for the months of the year. It is used by Palmeta Mail to parse date codes in message headers.

[Messages]

The [Messages] section contains the text of messages which are posted in the Pilot Inbox and the HotSync log on your PC by Palmeta Mail.