

Quick Start Guide: NotifySync for BlackBerry

Service Requirements

Your device will require one of the following:

- Cellular connection supporting data transmission through your mobile service provider.
- WiFi connection with internet access.

Please refer to your device user guide or contact your mobile service provider for help in configuring your service.

Memory Requirements

This is the amount of free space required to install the **NotifySync** application. You will need additional memory to download and store messages and PIM items (calendar events, contacts and tasks).

Free Space for Installation	Notes
1.2MB	Additional space is needed to store notifications you receive and messages you send.

BlackBerry Handheld Operating System (OS) Requirements

BlackBerry® OS versions 4.2.1 – 5.0 are supported, however, email attachment support is based on the BlackBerry OS version as listed below. It is highly recommended that you upgrade the handheld operating system software to the latest version available for the device/carrier you are using. Check carrier/device links for updates to the [BlackBerry software](#).

- 4.5 - 5.0 – Attachments can be downloaded and saved to the file system or SD Card. Any attachment type can be opened and viewed directly from *NotifySync*, provided there is an application installed that is associated with the specific file type.
- 4.3 through versions less than 4.5 – Attachments can be downloaded and saved to the file system or SD Card. Certain attachment types (mainly media types) can be opened and viewed directly from *NotifySync*.
- 4.2.1 through versions less than 4.3 – Attachments can be downloaded and saved to the file system or SD Card, but cannot be opened directly from *NotifySync*.

The best practice is to upgrade the handheld operating system software to the latest version available for the device/carrier you are using.

Hint: Updating the Device Operating System Any time you update device operating system software, you should also make sure you have installed the latest updates to the *NotifySync* software, since the OS update may unlock *NotifySync* functionality that is compatible with newer OS versions. Use the *Notify BlackBerry Installer* to check for updates. When you open it, a check initiates. The *Installer* will then check mark the applications that have updates available. Choose "Continue" to install them. See also [Knowledge Base article #699](#).

Install NotifySync

Over the Air (OTA) Installation

Follow the instructions below to download the *NotifySync* application to your device. You will download the ***Notify BlackBerry Installer*** to the device and use it to install the ***NotifySync*** application.



Notify icons on the BlackBerry Home page

Installation Checklist

- Fully charge your battery before you begin.
- Do a full backup of the device.
- Make sure you are in a serviceable mobile phone area.
- Feel free to use synchronization applications to download the ***NotifySync*** application onto your device, **BUT...**
- **DO NOT** use other synchronization software to synchronize your Email and PIM once *NotifySync* has been installed. ***NotifySync*** will handle all Email and PIM synchronization.

- **Disable the *Encryption* (≥OS v5.0) or *Content Protection* (<OS v5.0) option** on your BlackBerry as it will prevent *NotifySync* from accessing the Contact, Calendar, and Task information stored on the device. Access these settings from the BlackBerry Home screen.
 - **For OS versions ≥5.0** Select *Options* > *Security Options* > *Encryption* and disable the *Device Memory* option.
 - **For OS versions <5.0** Select *Options* > *Security Options* > *General Settings* and disable *Content Protection*.
- **If you plan to use a BIS Email Account on the same device as your NotifySync account.** Set up your BIS Email account (gmail, aol, yahoo, etc.) first, if you have not done so already. Wait for the service books to be sent down to the device, then delete the CICAL service book from the device before you install *NotifySync*. See [knowledge base article #314](#) for more details.
- Set the device to the language of your choice prior to installing *NotifySync* (*Options* > *Language*). Doing so will ensure a more complete language conversion.

Step 1: Download the Notify BlackBerry Installer

1. Open the **Internet Browser** or **Browser** on the device. Enter the web address, <http://notifysync.notify.net/ota.asp> and select **OK**.
2. Enter your Name, Company, Email Address and Mail Server Type on the form, and select **Next**.
3. **Accept** the End User License Agreement.
4. Select the **Download** button to download the installer. A bar showing the download progression displays.
5. A dialog displays when the application has successfully installed.
 - Select **Run** to launch the *Notify BlackBerry Installer* application.
 - Select **OK** if you wish to postpone the installation process. The *Notify BlackBerry Installer* icon appears on the device's desktop.



Step 2: Using the Notify BlackBerry Installer, download and install the NotifySync application

1. If you have not done so already, launch the **Notify BlackBerry Installer**
2. Select **Check for Updates** to begin the process of downloading *NotifySync*. The installer locates the most current *NotifySync* version available, along with the *Notify Core Library* and the PDF attachment viewing application, *BeamReader*.
3. Select both *Notify* options, and *BeamReader* (an additional license is required) if you wish, then click **Continue** or select **Perform Updates** from the menu.



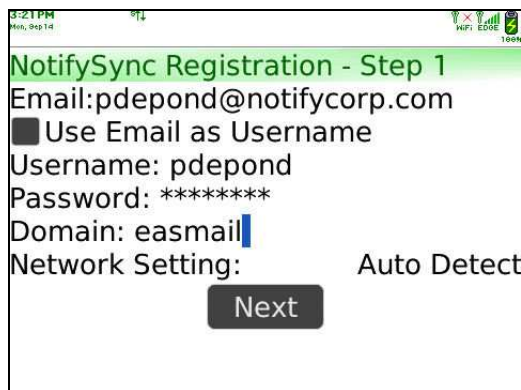
4. At the installation confirmation screen select **Yes** to confirm and continue. A progression bar displays as the applications download.
5. When the download is complete, reset the device in one of the following ways:
 - Press the key combination ALT+SHIFT+DEL
 - Remove the battery and wait 10 seconds before inserting it back into the device
6. You are now ready to register the device. See [Register Your Device](#).

Register Your Device

Once the *NotifySync* application is installed on your device, you must register your account. Email and PIM synchronization will not begin until you are registered.

To Register

1. Select the **NotifySync icon** from the BlackBerry desktop. *Hint:* The icon may be located on the Home screen or in the *Applications* or *Downloads* folder.
2. Enter the full **Email** address associated with your ActiveSync server account.
3. Place a check in the box beside, **Use Email as Username** if you are required to use your email address as the username for authentication with the ActiveSync server. *Hint:* Check with your IT administrator or Email Provider to verify if you are to use your full Email Address for the Username field or just the first section of your Email Address (everything before the @).
4. Enter your user credentials.
 - In the **Username** field, enter the full email address or the username associated with your ActiveSync server account (usually everything before the @). See *Hint* in Step 3.
 - Enter the **Password** associated with your ActiveSync server account.



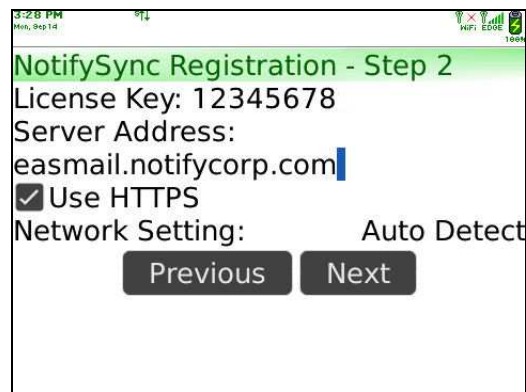
5. Enter the **Domain** name associated with your ActiveSync server account.

Hint: If registration fails and displays errors, the device will return to the registration screen. Try editing your Domain entry in one of the following ways:

- The login you use to access Web mail may contain the Domain. It is often in the format: Domain/username. Try this Domain.
- Sometimes the text that comes after the @ sign in your Email address is considered the Domain. EX: If your Email address is: *name@company.com*, your Domain may be *company.com*.

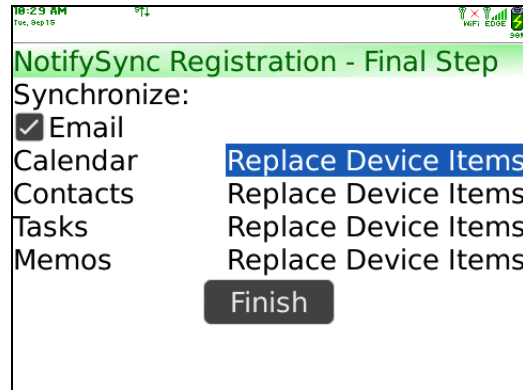
- Sometimes the domain may use part of the text that comes after the @ sign in your Email address, with “.local” appended to it instead of “.com”. EX: If your Email address is: *name@company.com*, your Domain may be *company.local*.
 - Sometimes the *NotifySync* registration can be completed by leaving the Domain field blank.
6. The **Network Setting** field allows you to choose the network type *NotifySync* uses when opening network connections. The default is **Auto Detect** which automatically chooses an appropriate network setting based on available services. Accept **Auto Detect** and prioritize the connection types from the **Advanced...** screen, or select a specific **Preferred Network** type.

Note: If you intend to use Direct Push synchronization, you must use TCP network provisioning.
 7. Select **Next** to proceed. The device will make a connection and attempt to **Autodiscover** the ActiveSync server address based on the user credentials you have entered.
 8. Enter your 8 character **License Key**.



9. Enter the **Server Address**. This is the external address or domain name of your ActiveSync Server. This field may already be populated if the Autodiscovery process was successful. **Hint:** This is usually the same address you use to log into Web mail.
10. Check the **Use HTTPS** box to enable SSL encryption.

Note: If enabled, all data transferred between the server and your device is sent securely over HTTPS. Ask your IT administrator if SSL is available to you.
11. Select **Next** to proceed.
12. Check the **Email** box to synchronize mail.
13. Select the types of **PIM** items (calendar, contacts, tasks, memos) to synchronize. Choose whether you wish to:
 - **Replace Device Items** – Deletes and replaces items currently on the device with items synchronized from the server.
 - **Merge Items** – Merges the items that currently exist on the device and server together in both locations.
 - **Do Not Sync** – Prevents this item type from synchronizing.



14. Select **Finish** to initiate the registration.

Set Your NotifySync Preferences

Set options for customizing the functionality of *NotifySync* through the *NotifySync Preferences* menu on the device.

Select the *NotifySync* icon and then select **Preferences** from the message list menu.

Push Settings

Push Settings give you the ability to define the mode of synchronization the device uses (*Scheduled Push* or *Direct Push*) and the interval at which connection to the *NotifyLink* server is made.

You may define different settings for weekdays and weekends and set synchronization to operate all day, for a defined period of the day, or to be turned off altogether.

Push Type Network Requirements

- Direct Push is supported on devices provisioned for TCP by the carrier network.
- Scheduled Push is supported on devices provisioned for BIS or TCP
- WiFi connections require the use of either BIS or TCP WiFi.



1. Select the **NotifySync icon** from the Home screen.
2. From the message list menu, select **Preferences > Push Settings**.
3. Select the **Push Type**. Choose **Scheduled Push** or **Direct Push**.
 - a. For **Schedule Push**, define the following:

Weekday Settings	Set to: Off, Interval, or All Day to determine when the device will synchronize Mondays through Fridays.
Weekend Settings	Set to: Off, Interval, or All Day to determine when the device will synchronize on Saturdays and Sundays.
Push Frequency	If you have set weekdays/weekends to <i>All Day</i> or <i>Interval</i> , type in the number of minutes between synchronizations (valid entry=1 to 90 minutes). Default is 5 minutes, resulting in the device synchronizing every 5 minutes.
Range	If you have set weekdays/weekends to <i>Interval</i> , choose the times you wish the synchronization to start and end. Times must be within one 24-hour period. Defaults are 7:00 to 19:00, resulting in the device synchronizing from 7am to 7 pm.

- b. For **Direct Push**, define the following:

Direct Push Timeout	Duration of a direct push session. Default is 15 minutes. Checking the Dynamic Interval box enables the device to automatically adjust the duration of the direct push session. This is recommended as it enables the device to monitor the performance of the direct push session and adjust the setting to the optimal value.
Weekday Settings	Set to: Off , Interval , or All Day to determine when the device will synchronize Mondays through Fridays. Default is <i>Interval</i> .
Weekend Settings	Set to: Off , Interval , or All Day to determine when the device will synchronize on Saturdays and Sundays. Default is <i>Interval</i> .
Range	If you have set Weekdays/Weekends to <i>Interval</i> , choose the times you wish the synchronization to start and end. Times must be within one 24-hour period. Defaults are 7:00 AM to 7:00 PM.

4. Select **Save** from the menu.

Email Settings

Email Settings give you the ability to configure options for sending and receiving email and meetings. The settings affect email in your device *Inbox* and any custom mail folder you have tagged for synchronization.

1. Select the **NotifySync icon** from the Home screen.
2. From the message list menu, select **Preferences > Email Settings**.
3. Select your preferences for Email settings:

Include Self in Reply All	Enable this option to include yourself in the recipient list when sending a Reply to All. Default setting: disabled
Close Original Message on Reply or Forward	Enable this option to automatically close the original message after you reply to or forward it and return to the message list. Default setting: disabled
Enable Spell Check When Sending Messages	Enable this option to automatically check spelling in all messages sent from <i>NotifySync</i> . Default setting: disabled Note: Spell check is only available on devices running BlackBerry OS 4.5 - 5.0.
Email Body Type	Determine the format in which <i>NotifySync</i> displays the messages it retrieves from the ActiveSync server. Default setting: <i>Plain Text</i> Plain Text: Displays all emails in plain text (contains no formatting), converting HTML emails to plain text as well. HTML: Displays emails in HTML (text formatted for the Web) whenever possible
Auto Complete	If enabled, Email addresses, currently stored on the device, are automatically completed as you type them into recipient fields. Default setting: Enabled for both Frequent and Address Book Frequent Emails – If checked, pulls completed addresses from your frequent contact list (addresses to which you have recently sent Emails). Address Book Emails – If checked, pulls completed addresses from your device's address book.
Add Signature to Outgoing Messages	Enable this option to add a signature to all outgoing messages sent from <i>NotifySync</i> . Compose the signature here as well. Default setting: enabled with generic signature

4. Select **Save** from the menu.

Sync Settings

Sync Settings allow you to select the accounts to process for email, calendar, contacts, tasks and memos and the folders to which items will synchronize.

You can also specify synchronization ranges for mail and calendar information. The mail and calendar synchronization ranges serve as cleanup filters which allow users to control the amount of data stored on a device.

1. Select the **NotifySync icon** from the Home screen.

2. From the message list menu, select **Preferences > Sync Settings**.
3. Specify your preferences for the information is synchronized from the server:

Account Name	The <i>NotifySync</i> account with which you are synchronizing email.
Sync Emails	<p>Check this box to allow synchronization of email from the server to the device.</p> <p>Download the past: <i>1 or 3 days, 1 or 2 weeks, 1 month or All of your email.</i> This allows you to define a synchronization range for your mail. Example: Choosing <i>3 days</i> (the default) will keep email from the past 3 days to the present on your device. Once emails move out of the 3 day range, they are removed from the device.</p>
Calendar Account:	<p>The <i>NotifySync</i> account with which you are synchronizing calendar items. You can turn calendar synchronization off by selecting <i>None</i>.</p> <p>Sync the past: <i>2 weeks; 1, 3, or 6 months; or All of your calendar.</i> This allows you to define a synchronization range for your mail. Example: Choosing <i>1 month</i> (the default) will keep calendar events from the past month to infinity on your device.</p> <p>Map (server calendar folder name) To: Select the calendar list on the device that synchronizes with this calendar folder on the server.</p> <p>Default Folder: Specify the calendar folder on the server to which new calendar items originating on the device will synchronize.</p>
Contacts Account:	<p>The <i>NotifySync</i> account with which you are synchronizing contact items. You can turn contact synchronization off by selecting <i>None</i>.</p> <p>Map (server contacts folder name) To: Select the contacts list on the device that synchronizes with this contacts folder on the server.</p> <p>Default Folder: Specify the contacts folder on the server to which new contact items originating on the device will synchronize.</p>
Tasks Account:	<p>The <i>NotifySync</i> account with which you are synchronizing task items. You can turn task synchronization off by selecting <i>None</i>.</p> <p>Map (server tasks folder name) To: Select the tasks list on the device that synchronizes with this task folder on the server.</p> <p>Default Folder: Specify the tasks folder on the server to which new task items originating on the device will synchronize.</p>
Memos Account:	<p>The <i>NotifySync</i> account with which you are synchronizing memo items. You can turn task synchronization off by selecting <i>None</i>.</p> <p>Map (server notes folder name) To: Select the memo list on the device that synchronizes with this notes folder on the server.</p> <p>Default Folder: Specify the notes folder on the server to which new memo items originating on the device will synchronize.</p>

4. Select **Save** from the menu.

Start Using Your Device

View the Message List

View your Email *Inbox* by selecting the **NotifySync icon** from the device's Home screen.

Email Folders

The folder list contains the entire mail folder structure from your mail account on the ActiveSync server. This enables you to move messages around within the folder structure. However, in order for the actual contents of your ActiveSync account folders to synchronize to the device folders, you must select the folders for synchronization on the device via *Folder Settings*. The *Inbox* is the only email folder tagged for synchronization by default. All other folders must be tagged for synchronization in order for the actual **folder contents** (*the mail inside the folder*) to synchronize.

To view the Email folders available in addition to the *Inbox*, select **View Folder** from the message list menu.

View a Message / Retrieve an Attachment

To view a message: Scroll through your message list to highlight the message you wish to see. Press the **Enter** key or select **View** from the menu.

To retrieve an attachment: Open the message containing the attachment. Highlight the attachment you wish to open and select **Download Attachment** from the menu. A progress bar displays as the attachment downloads and opens.

NOTE: The attachment will only open if an attachment viewing application which supports the file type exists on the device. An error message displays when the file type is not supported.

Send an Email Message

1. Press the **C** key or select **Compose** from the message list menu to write an Email.
2. Enter the **recipient's Email address**. To look up an address, select **Add Recipient** or **Company Directory** from the menu.
3. Enter the Email **subject**.
4. Type the **body** of the Email message.
5. To include an attachment, select **Add Attachment** and choose the location from which you will select the attachment.
6. Select **Send** from the menu.

Add a Contact

From **Contacts** you may create a new contact or view and edit existing entries.

1. Select the **BlackBerry Address Book icon** from the Home screen.
2. Select **New Address** from the address book menu.
3. Enter the contact's name and personal information for any of the optional fields available.
4. Select **Save** to save the new contact and return to the contact list.

Use the Find Tool

To quickly locate the contact you want, use the *Find Bar* at the top of the contact list screen. Enter as much of a first or last name as you know. With the entry of one letter, the list narrows to include only contacts whose first or last name begins with that letter. The more characters entered, the less inclusive the list becomes.

Address Book Menu Options

Delete	Deletes the selected contact.
Options	Set various viewing options.
Filter	Specify which contacts to display by category and create new categories.
Company Directory	Search for a contact in a public address book located on the server.

Travel Tips

- If you plan on traveling in another time zone, change the time zone on your device as well as the time zone of your mail/PIM account on the ActiveSync server.
- As with any internet based application, *NotifySync* uses the data connection on your phone. When roaming, data charges from your mobile network provider can be much higher. Thus, while travelling,

you may wish to adjust [Push Settings](#) by increasing the time between synchronizations or temporarily disabling synchronization to avoid additional data charges.

- If you travel internationally, contact your carrier to inquire about the availability of international travel data plans. Such plans may reduce the cost of your usage while travelling outside the country.
- Apply more stringent security settings to your device when you travel. See [Security Tips](#).

Security Tips

Make use of the security features described below. These features can be set from your device in the ***NotifySync Preferences***.

NotifySync Lock Settings	
Inactivity Timeout	Enter number of minutes before the device locks due to inactivity.
Challenge Timeout	Enter number of minutes before the device locks. This lock is initiated regardless of inactivity and is intended to challenge unauthorized use of the device if it is lost or stolen.
Wipe on Failed Unlock	Enter the number of failed unlock attempts before the device erases all data/applications from the device. This limits the chances an unauthorized user has to guess a password.
NotifySync Password Settings	
Password Expiration	Enter the number of days (30-365) until a password expires.
Password History	Enter the number of passwords (10-100) to store. If the number of stored passwords is 10, you will not be able to use the past ten passwords.
NotifySync General Security Settings	
Email Encryption at Rest	Enable data-at-rest encryption for the email database on the device storage disk, which contains all <i>NotifySync</i> email data. Choose the level of encryption: Secure (128-bit) / More Secure (192-bit) / Most Secure (256-bit)

NotifySync Technical Support

Contact the **Notify Technology Corporation** technical support team at support@notifycorp.com

Or by phone at 330.702.3070