

Intellisync Mobile Suite

Client User's Guide

Windows Mobile OS

Pocket PC Device



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CHAPTER

1

Getting Started

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

The sections in this chapter are as follows:

- Understanding synchronization
- Synchronizing using Intellisync Mobile Suite

Understanding synchronization

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

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

Synchronizing using Intellisync Mobile Suite

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

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

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

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



CHAPTER

2

Setting Up Your Device

This chapter provides information on how to install Intellisync Mobile Suite on your Pocket PC device. After a successful installation, Intellisync Mobile Suite can synchronize your e-mail messages and PIM information with your company's server.

Installing Intellisync Mobile Suite

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

Make sure your Pocket PC device is in the cradle that is connected to your computer. ActiveSync must be installed on your computer to install the Intellisync software on your device.

Setting up ActiveSync

To install and synchronize your device from the cradle, you must set up ActiveSync on your PC in a specific way. If your device dials a data connection when synchronizing in the cradle but your PC can connect to the Internet directly or through a proxy, the ActiveSync options are not set correctly on your PC.

To set up ActiveSync, follow these steps:

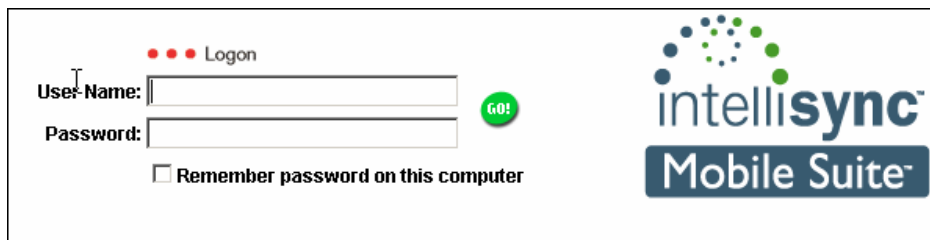
1. Open ActiveSync on your PC.
2. From the **Tools** menu, choose **Options**. The Options dialog box appears.
3. Click the **Rules** tab.

4. From the Connection list, select **The Internet** if your PC can connect directly to the Internet; select **Work** if your PC connects to an internal network that cannot reach the Internet; or select **Work** and set up the proxy in Internet Explorer options if your PC connects to the Internet through a proxy.
5. Click **OK**.

The next time you put your device in the cradle, these settings transfer to the device and the device synchronizes correctly in the cradle.

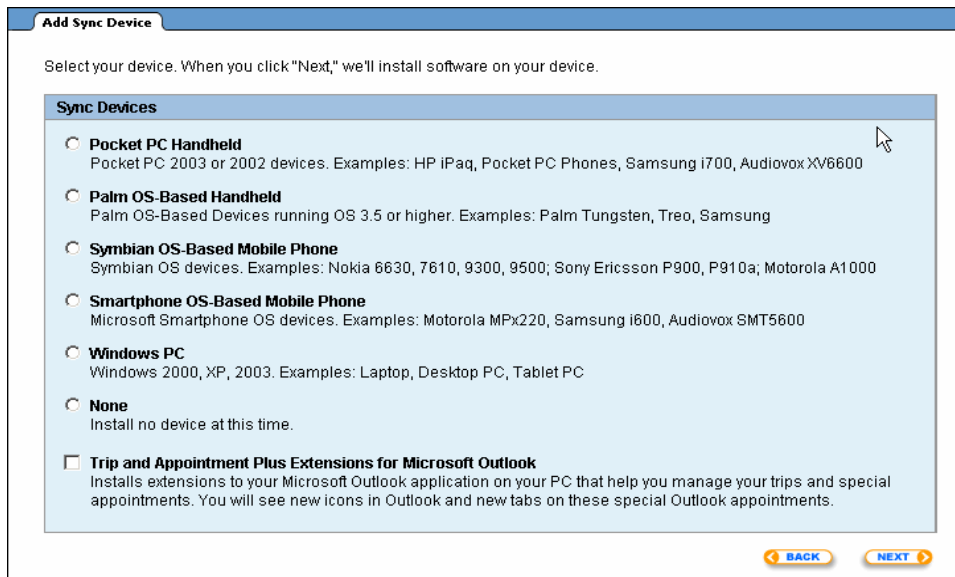
To start the installation process, follow these steps:

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



Login page

2. Enter your user name and password, and then click **Go**. The e-mail page appears.
3. From the **Setup** menu (at the right top corner of the page), choose **New Sync Device**, and then click **Next**. The Add Sync Device page appears.



Add Sync Device page

4. Select the Pocket PC Handheld option. The Install Software page appears.

Install Software

Would you like to install software on your phone wirelessly?

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

Yes!

Enter your phone number and click Submit. You will receive instructions on your phone on how to finish the installation.

Carrier and Phone Number, or

Wireless carrier:

Phone number:

Email Address for your Mobile Phone

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

SUBMIT

No, thanks. Please install through my PC.

NEXT

Install Software page

5. Select the Carrier and Phone Number option and your wireless carrier from the list, and then enter your phone number (without dashes).

▶ You may also select the “Email Address for your Mobile Phone” option if you know your phone’s e-mail address.

6. Click **Submit**. The Install Software page appears with notification that a Short Message Service (SMS) text message has been sent to your device.

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

▶ You still have the option of using a PC-based installation by clicking **Next** under the “No, thanks. Please install through my PC” option.

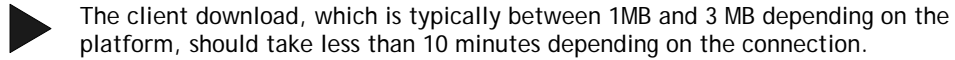
After you initiate the installation process, verify that you received an SMS text message on your device.

To install Intellisync Mobile Suite software on your device, follow these steps:

7. Open the SMS text message on your device.
8. Tap the link in the SMS text message for Intellisync Mobile Suite’s installation file.
9. Tap the **Install Software: Pocket PC** link. The Download dialog box appears.

10. Select the “Open file after download” check box, and then tap **Yes**. The client download status bar appears at the top of the screen.

When the download completes, Intellisync Mobile Suite software loads to your device. After the software installation completes, your device prompts you to enter your user name and password to start your first synchronization.



11. A dialog box appears with the initial synchronization session options:

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

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

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

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

Your Pocket PC device appears in the device name list. Intellisync Mobile Suite is successfully installed on your device.



Using Intellisync Mobile Suite

This chapter provides information on how to use Intellisync Mobile Suite on your Pocket PC device and on the Web. The sections in this chapter are as follows:

- Synchronizing your device
- Modifying synchronization settings
- Viewing weather, appointments, and trips
- Using Contact Lookup
- Using Intellisync Mobile Suite on the Web

Synchronizing your device

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

To synchronize your device, follow these steps:

1. Tap the **Intellisync** icon. The Intellisync Mobile Suite main screen appears.
2. Tap the **Sync** icon. The Sync Process dialog box appears.

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

- ▶ Any changes to PIM information on your device is only updated to your company's server with a successful synchronization session.

Modifying your synchronization settings

If your administrator allows you to change your default synchronization settings, you can configure Intellisync Mobile Suite to suit your individual requirements. Types of synchronization settings include the following:

- **Sync and SyncExpress.** These settings affect your e-mail messages and PIM information. Sync allows for a more comprehensive sync session and may require more transfer time. SyncXpress allows for a scaled-down synchronization session.
- **Push/ReadySync.** These settings affect the way your device automatically synchronizes with your company's server.

Using Sync settings

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

To modify the Sync settings, follow these steps:

1. Using your device, tap the **Intellisync** icon. The Intellisync Mobile Suite main screen appears.
2. Tap **Menu**, and then tap **Sync Settings**. The Sync Settings – Activities screen appears.
3. Select or clear the appropriate check boxes, and then tap **OK** to return to Intellisync Mobile Suite main screen.

Using SyncXpress settings

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

To modify the SyncXpress settings, follow these steps:

1. Using your device, tap the **Intellisync** icon. The Intellisync Mobile Suite main screen appears.
2. Tap **Menu**, and then tap **SyncXpress Settings**. The Sync Settings – Activities screen appears.
3. Select or clear the appropriate check boxes, and then tap **OK** to return to Intellisync Mobile Suite main screen.

Using Push/ReadySync settings

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

1. Using your device, tap the **Intellisync** icon. The Intellisync Mobile Suite main screen appears.
2. Tap **Menu**, and then tap **Push/ReadySync Setup**. The Push/ReadySync screen appears.

3. Modify the following fields as necessary:

Enable Push. Select this check box to automatically synchronize e-mail messages and PIM information.

Enable ReadySync. Select this check box to enable ReadySync.

Limit Push/Ready Sync time window. Select the day setting from the list. Tap the start and end times within which Push and ReadySync should operate.

ReadySync Interval. Select an interval from the list. This indicates the frequency with which you want ReadySync to connect.

Start ReadySync when device connects. Select this check box to start a ReadySync session as soon as you make a connection.

Notification of data received. Select this check box if you want a sound, a message, or a screen flash when ReadySync receives data. Tap **Settings** to assign sounds to notification events.

Disable when battery is less than. Select this check box and enter a percentage of battery life at which you want to disable Push and ReadySync.

4. Tap **Advanced**. The Advanced screen appears.

5. Modify the fields as necessary:

Initiate network connection. Select this check box to automatically initiate a network connection.

Initiate even if device is powered off. Select this check box to automatically initiate a network connection when the device is powered off.

High-speed connect default. Select from the list the type of connection for a synchronization session.

Low-speed connection default. Select from the list the type of connection for a synchronization session.

Use network push. Select this check box to use network Push.

Use SMS push. Select this check box to use SMS Push.



Advanced options are only available if you select Enable Push or Enable ReadySync on the Push/ReadySync screen.

6. Tap **OK** to return to Push/ReadySync screen, and then tap **OK** to return to the Intellisync Mobile Suite main screen.

Guidelines for setting up Push options using your device

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

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

Viewing weather, appointments, and trips

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

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



For more information and instructions on how to create trips and appointments, refer to the “Using Intellisync Mobile Suite on the Web” section.

Using Contact Lookup

If your company offers the Contact Lookup feature, you can search for contacts in your address book. To view this information on the device, follow these steps:

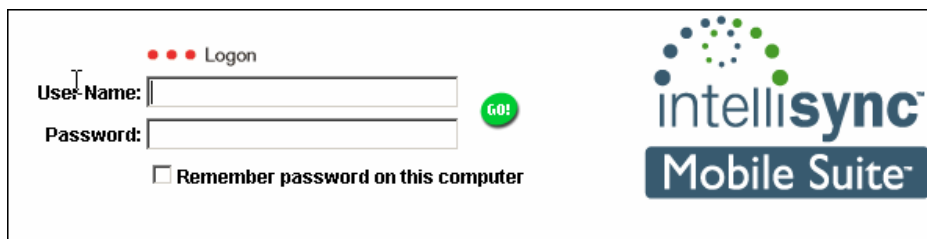
1. Using your device, tap the **Intellisync** icon. The Intellisync Mobile Suite main screen appears.
2. Tap the **Lookup** link. The Contact Lookup screen appears.
3. Enter information for a contact search in the available fields, and then tap **Lookup**. The Search results screen appears.
4. Select a contact name, and then tap **OK** to view full contact information.

Using Intellisync Mobile Suite on the Web

In addition to your device, Intellisync Mobile Suite on the Web allows you to check and send e-mail messages, enter calendar entries, and add contacts and memos. Intellisync Mobile Suite on the Web also allows you to view your activity log, create trip itineraries and appointments, and add and manage alert devices.

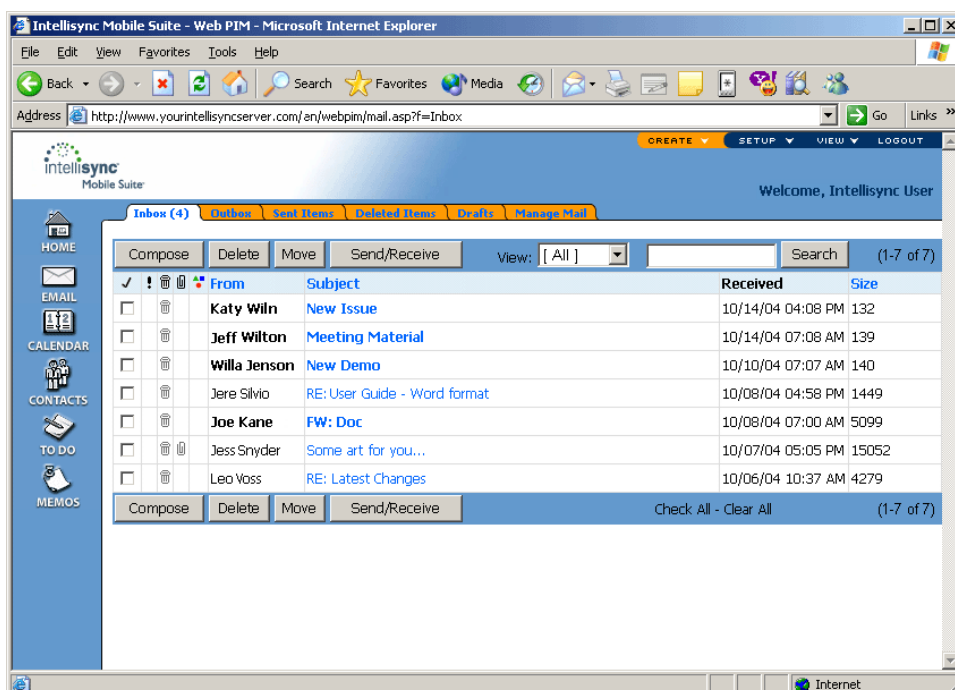
To access Intellisync Mobile Suite on the Web, follow these steps:

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



Login page

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



E-mail page

Using Web navigation

Intellisync Mobile Suite on the Web has easy-to-use navigation. Use the following icons on the left of the page to navigate through the site:

Home. Displays the main page. You can view the weather for your zip code and click the tabs at the top to view any appointments and trips.

Email. Displays your e-mail. Using the tabs at the top, you can view your Inbox, Outbox, Sent Items, Deleted Items, and Drafts e-mail folders. Use the **Manage Mail** tab to compose messages, send and receive messages, and empty deleted items.

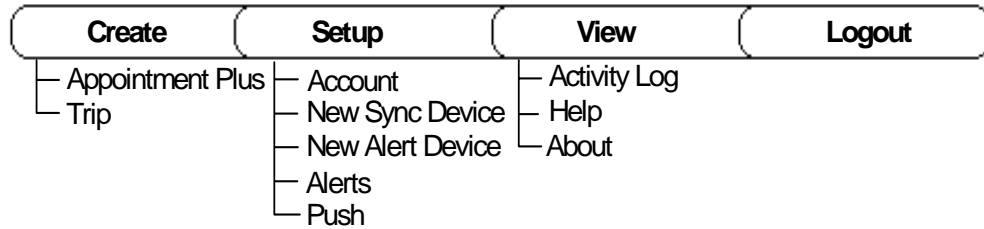
Calendar. Displays your calendar. Using the tabs, you can select Day, Week, Month, and Year calendar views. Use the Quick Add feature to add a new appointment.

Contacts. Displays your contacts list. For any contacts entered, you can use the tabs at the top labeled A to Z to search for a specific contact.

To Do. Displays your task list. You can add, delete, and move tasks or mark tasks as completed.

Memos. Displays your memos. You can create memos and apply a specific category for each item.

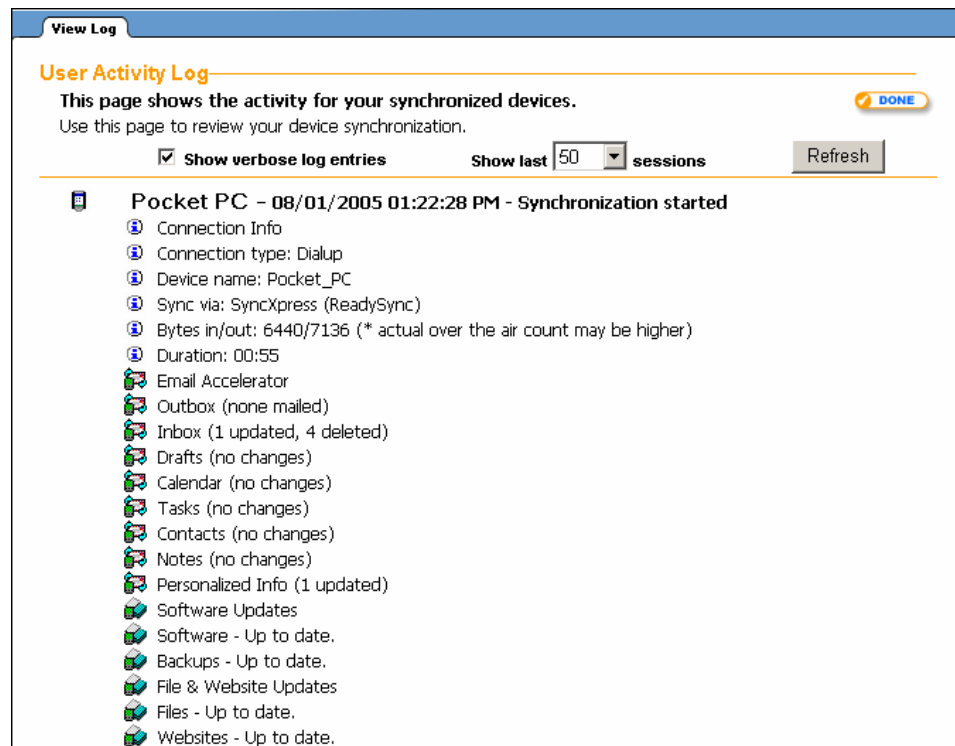
Intellisync Mobile Suite on the Web has a menu at the top right corner of each page for you to complete certain tasks. The following diagram shows the options available.



Intellisync Mobile Suite Web menu

Viewing your activity log

When you use Intellisync Mobile Suite on the Web, you can review the status of a synchronization session with your device. To open a log containing activity for each synchronization session, choose **Activity Log** from the **View** menu.



Activity Log page

Selecting contacts to synchronize

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

To select the contact categories to synchronize, choose **Account** from the **Setup** menu. The Configure Account page appears. Click the **Pick Contacts to Sync** link. The Pick Contacts to Sync page appears.

Pick Contacts to Sync

Use this feature to control what contacts you want to sync to your phone or handheld device(s). This is especially useful if you have lots of contacts and your device has limited capacity.

Select Contacts to Sync

Sync all contacts (54 contacts)

Sync only contacts in these categories:

Unfiled (36 contacts) - Note that if you don't check "Unfiled," then any contacts that are initially on the device and not in a category won't get synced to the server.

Phone Calls (1 contact)

Family (1 contact)

Personal (9 contacts)

Business (3 contacts)

STC List (6 contacts)

Total contacts selected: 0 contacts Update Total Selected

Select Contacts to Sync page

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

Contacts who are not assigned to a category appear as "Unfiled." If you do not select **Unfiled**, any contacts initially on your device and not assigned to a category will not be synchronized to your company's server. Click **Submit** when you complete your selections.

Setting up Push options

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

To set up your Push options, choose **Alerts** from the **Setup** menu. The Configure Push page appears.

Configure Push page

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

Guidelines for setting up Push options using the Web

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

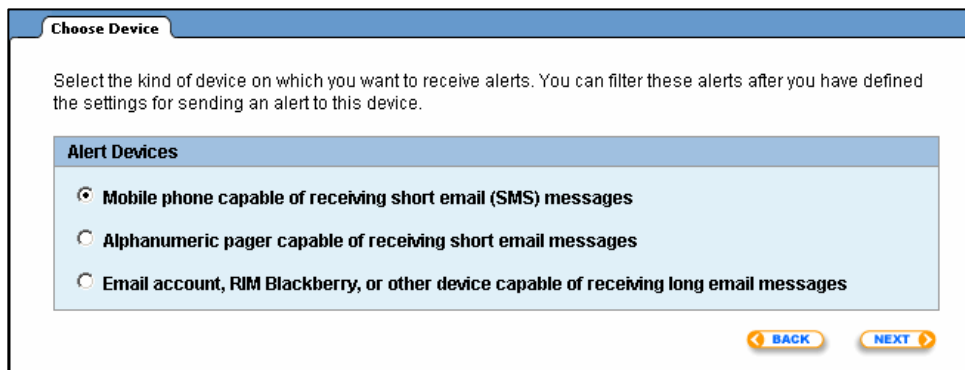
Remember, the complete contents of your Inbox are synchronized for every Push session, but a Push session is not triggered until your filter criteria are met. As you become familiar with how Push settings work in your environment, adjust your filters for better performance.

Adding an alert device

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

To add a new alert device, follow these steps:

1. From the **Setup** menu, choose **New Alert Device**. The Choose Device page appears.



Choose Device page

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

Guidelines for setting alerts

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

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

Creating appointments

You can create events and appointments using Intellisync Mobile Suite on the Web. From the **Create** menu, choose **Appointment Plus** to create a new appointment. Using the **Event** tab, you can enter general information about the appointment, and then click **Save**.

The screenshot shows a web interface for creating a new event. At the top, there are tabs for 'Event' and 'Appointment Plus', with 'Appointment Plus' selected. Below the tabs is the title 'New Event' and two buttons: 'CANCEL' and 'SAVE'. A 'Make Recurring' button is located on the right side of the form. The form contains several input fields: 'Subject' and 'Location' are text boxes; 'Starts' and 'Ends' are date and time pickers (e.g., Aug 1, 2005, 09:00 AM); 'Show Time As' is a dropdown menu set to 'Busy'; 'Duration' is a time picker set to 0 Days, 0 Hours, and 30 Minutes; and 'Description' is a large text area. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

Event tab

Click the **Appointment Plus** tab to enter detailed appointment and meeting information. Use the Mobile Reminder Options section to specify reminders for appointments and meetings. The list includes time intervals up to two days. To create reminders in a greater interval, click the ellipsis icon and make your selection. Click **Save** to update all information.

The screenshot shows the 'Appointment Plus' tab in the Intellisync Mobile Suite web interface. The page is titled 'Appointment Plus' and has a 'CANCEL' button and a 'SAVE' button in the top right corner. Below the title is an 'Appointment Summary' section with fields for 'Subject', 'Meet with', 'Job Title', 'Company', 'Phone', 'Email', and 'Mobile'. There is a 'LOOK UP' button next to the 'Job Title' field. Below this is a 'Meeting Location' section with radio buttons for 'I'll call them at this number', 'They'll call me', and 'Meet in person at'. The 'Meet in person at' option is selected. Below this are fields for 'Street', 'City', 'State/Province', 'ZIP/Postal code', and 'Country/Region'. At the bottom, there are two sections: 'Appointment Info Options' with a checked 'Gather Directions' checkbox, and 'Mobile Reminder Options' with a 'Send reminder' checkbox, a time interval dropdown set to '15 minutes', and a 'before' label. A time zone dropdown is set to 'Eastern Time (US & Canada) (GMT-5:00)'.

Appointment Plus tab

Creating trips

You can create trip itineraries using Intellisync Mobile Suite on the Web. From the **Create** menu, choose **Trip** to create a new trip itinerary. Using the **Trip** tab, you can add flight, car rental, hotel, and city information.

The screenshot shows the 'Trip' tab in the Intellisync Mobile Suite web interface. The page is titled 'Trip' and has a 'CANCEL' button and a 'SAVE' button in the top right corner. Below the title is a 'Name of Trip' field and a 'TRIP CITIES' button. Below this is an 'Itinerary' table with columns for 'Date', 'Time', 'Type', and 'Description'. At the bottom, there are buttons for 'EDIT', 'REMOVE', 'ADD FLIGHT', 'ADD CAR RENTAL', and 'ADD HOTEL'.

Trip tab

Click the **Event** tab to enter general information about the Trip, and then click **Save**.

The screenshot shows a web-based form for creating a new event. The form is titled "New Event" and has two tabs: "Event" (selected) and "Trip". The form contains the following fields and options:

- Subject:** A text input field.
- Location:** A text input field.
- Starts:** A date and time selector. The date is set to "Aug 1 2005" and the time is set to "09:00 AM". There is an "All Day" radio button.
- Ends:** A date and time selector. The date is set to "Aug 1 2005" and the time is set to "09:30 AM".
- Show Time As:** A dropdown menu set to "Free".
- Duration:** A selector for "0 Days", "0 Hours", and "30 Minutes".
- Description:** A large text area for entering details.

At the top right and bottom right of the form, there are "CANCEL" and "SAVE" buttons.

Event tab

Using the Personalized Info option for trips

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

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



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

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

Intellisync Mobile Suite can import travel itineraries from following travel agent systems, online travel providers, airlines, car rental agencies, and hotels:

- Amadeus (plain text)
- Worldspan (plain text)
- Apollo/Galileo (plain text)
- Sabre (plain text)
- Orbitz (plain text and HTML)
- Travelocity (plain text)
- Expedia (some itineraries)
- AirTran (plain text attachment)
- American Airlines (HTML-formatted e-mail)
- Continental Airlines (plain text)
- Delta Airlines (plain text and HTML attachment)
- EasyJet (HTML-formatted e-mail)
- Southwest Airlines (plain text)
- Hilton (plain text)
- Marriott (plain text)
- Hertz (plain text)

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

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



Configuring Optional Settings

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

The sections in this chapter are as follows:

- Changing Web e-mail settings
- Changing user preferences
- Changing performance settings

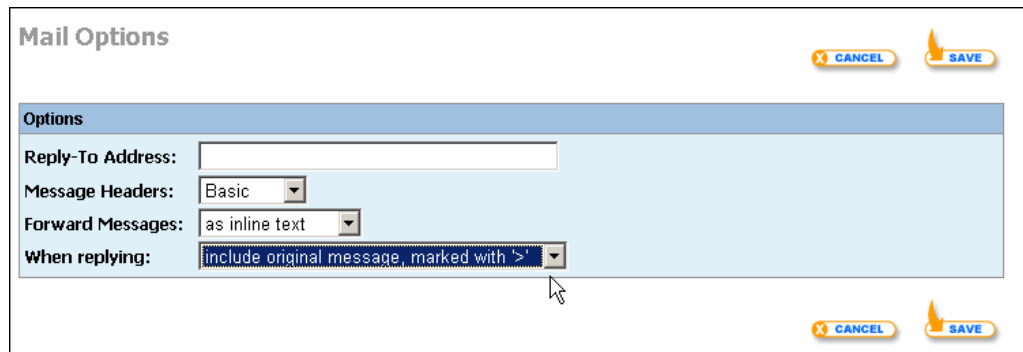
Changing Web e-mail settings

You can change your settings for sending e-mail messages using Intellisync Mobile Suite on the Web. These settings only affect e-mail messages using the **Manage Mail** tab on the e-mail page.

To change your Web e-mail settings, use the following steps:

1. From the **Setup** menu, choose **Account**. The Configure Account page appears.

2. In the Account Settings section, click the **Web Email Settings** link. The Mail Options page appears.



Mail Options page

3. Complete or change these fields as necessary:
 - Reply-To Address.** If you want to have recipients reply to a different e-mail address, type that address in this field. Otherwise, leave this field blank.
 - Message Headers.** Choose between basic and extended message headers. For most users, basic headers are sufficient.
 - Forward Messages.** You have two options for forwarding messages. Forward messages as inline text appear in the body of the message. Forward messages as attached files appear as attachments.
 - When replying.** When you reply to a message, you can choose to include or exclude the text of the original message. If you choose to include the original message, you can have the original message text marked with “>” or “--” special characters.
4. Click **Save**.

Changing user preferences

You may modify any user preferences such as name, address, e-mail address, and other basic information using Intellisync Mobile Suite on the Web.

To change your user preferences, use the following steps:

1. From the **Setup** menu, choose **Account**. The Configure Account page appears.

- In the Account Settings section, click the **General User Information** link. The Configure User Settings page appears.

Configure User Settings page

- Enter or modify your information, and then click **Submit**.

Changing performance settings

Using the performance settings option, you can determine how much data you want to store in your Inbox, Sent Items folder, and Calendar.

To change your performance settings, use the following steps:

- From the **Setup** menu, choose **Account**. The Configure Account page appears.
- In the Account Settings section, click the **Performance Settings** link. The Performance Settings page appears.

Folder	Records	Size	Allowed Size
Contacts	0	0	Unlimited
Calendar	0	0	Unlimited
Notes	0	0	Unlimited
Tasks	0	0	Unlimited
Inbox	2	826	Unlimited
Outbox	0	0	Unlimited
Sent Items	3	296	Unlimited
Deleted Items	0	0	Unlimited
Drafts	0	0	Unlimited
Total	5	1.1k	Unlimited

Performance Settings page

- Modify the settings as necessary, and then click **Submit**.



APPENDIX

A

Quick Reference

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

Function	Instructions
View Intellisync Mobile Suite screen	Tap the Intellisync icon.
Synchronization	Tap the Intellisync icon. From the Intellisync Mobile Suite screen, tap the Sync icon.
View e-mail and PIM information data on your device	Tap the Intellisync icon, and then use the following: For Contacts, tap the Contacts link. For Calendar entries, tap the Calendar link. For Tasks, tap the Tasks link. For E-mail, tap the Inbox link.
View weather, trip or appointment information	Tap the Intellisync icon. From the Intellisync Mobile Suite screen, tap the Personalized Info link. For weather information, tap the Home tab For trip information, tap the Trip tab. For appointment information, tap the Appt tab.

Function	Instructions
View or change categories selected for synchronization	Tap the Intellisync icon. From the Intellisync Mobile Suite screen, tap Menu , and then tap Sync Settings .
Change Push/ReadySync settings	Tap the Intellisync icon. From the Intellisync Mobile Suite screen, tap Menu , and then tap Push/ReadySync Setup .
Change connection settings	Tap the Intellisync icon. From the Intellisync Mobile Suite screen, tap Menu , and then tap Connection Setup . Contact your system administrator for the appropriate values.
View connection summary	Tap the Intellisync icon. From the Intellisync Mobile Suite screen, tap Menu , tap View , and then tap Connection summary .