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1

Introduction

Congratulations on acquiring the latest version of **Pocket On-Schedule and On-Schedule Sync** — the finest Contact Manager available for the Microsoft Windows CE platform. Pocket On-Schedule enables mobile professionals to have full control of their contact information anytime, anywhere! Pocket On-Schedule is a versatile standalone contact manager that combines state-of-the-art features for professionals on the go. Pocket On-Schedule directly synchronizes with Microsoft Outlook and Desktop On-Schedule. Pocket On-Schedule does it all – Quickly, Simply, and Efficiently.

Odyssey Computing provides complete solutions for mobile device users. Refer to *Other Odyssey Software Products on page 3* for more information. This document only describes the synchronization process between Pocket On-Schedule and Microsoft Outlook 2000 or higher on the desktop PC.

Important: *If you are using desktop On-Schedule, please download the desktop On-Schedule Sync User's Guide from our website at www.odysseyinc.com.*

On-Schedule Sync

On-Schedule Sync lets you transfer and share data in order to keep your contact information organized and current on your desktop and your mobile device. Pocket On-Schedule allows full bi-directional synchronization (with conflict resolution) of contacts, calendars, tasks, journal, and notes with Microsoft Outlook.

NOTE: *Info Center and Phone log synchronization is only supported with Desktop On-Schedule*

This document covers the synchronization process that updates data files on both the desktop and mobile devices.

Synchronize Microsoft Outlook 2000 or higher with Pocket On-Schedule using On-Schedule's custom synchronization manager, *On-Schedule Sync*, with enhanced features such as multiple contact lists, calendars, task lists, journal lists, notes, and filters. See the following sections.

Important: *You will need to establish a connection to the mobile device using Microsoft ActiveSync before running the On-Schedule Sync setup.*

You can also download the latest versions of the On-Schedule Sync from the Odyssey Computing website at www.odysseyinc.com.

With the On-Schedule Sync applications, you will be able to synchronize one desktop PC with multiple mobile devices. Presently, you are not able to synchronize one mobile device with multiple desktop PCs.

Features Overview

This section summarizes the powerful features available in Pocket On-Schedule.

- | | |
|--------------------------------|---|
| Compatibility | <ul style="list-style-type: none">• Compatible with Desktop On-Schedule• Compatible with Microsoft Outlook 2000 or Outlook 2002 |
| Desktop Synchronization | <ul style="list-style-type: none">• Automatic and bi-directional synchronization (with conflict resolution) of multiple contact lists, calendars, task lists, journal, and notes.• Supports conflict resolution at the field level• Advanced record selection using filters |

Registration

As a registered user, you will be informed of new products and updates as they become available. You will also be eligible for special discounts on software upgrades. Technical support is only available to registered users. To register, please fax us a copy of your receipt together with your name, address, phone number and e-mail address. Also, feel free to contact us if you have any comments or suggestions.

Reaching Us

Mailing address:

Odyssey Computing, Inc.
17075 Via Del Campo, Suite 200
San Diego, CA 92127

Phone Numbers:

Sales	(858) 675-3660
Technical Support	(858) 675-3775
Fax Number	(858) 675-1130

Internet:

Product Info	info@odysseyinc.com
Sales e-mail	sales@odysseyinc.com
Support e-mail	support@odysseyinc.com
World Wide Web	http://www.odysseyinc.com

You can also post messages on the Odyssey Computing Forum at www.odysseyinc.com/forums. This allows you to exchange information and ideas with Odyssey Computing and other On-Schedule users. You can access the forums through our website at www.odysseyinc.com.

Other Odyssey Software Products

Contact Management Software

◆ Desktop On-Schedule

On-Schedule for Windows 98/SE/ME/NT/2000/XP is a versatile, 32-bit network-ready contact manager that lets you organize information efficiently. On-Schedule is the ideal desktop companion to Pocket On-Schedule as it allows you to automatically and bi-directionally synchronize contact history, multiple contact lists, calendars, task lists, notes, journal, calls and documents. On-Schedule provides extensive tracking of phone calls, enhanced mail/fax merge functions, direct e-mail and Internet support, integration with other popular applications, and comprehensive document management. The latest features include Custom Filters, Microsoft Fax and TAPI Support, Internet and Microsoft Exchange Integration, E-mail Merge, Contact Information Templates, Record/History Summary, Ad-hoc Links, Mobile Device Synchronization, powerful Windows style Wizards, and more.

Calculator Software

◆ Pocket and Desktop BizCalc

BizCalc is an intuitive, full-featured programmable business and financial software that emulates the popular Hewlett-Packard **HP-12C** calculator. Using **RPN** logic, it performs the following calculations as well as others: Loan/Mortgage, Discounted Cash Flow (NPV, IRR), Bond, Compound Interest, Leasing, Actuarial and Markup Functions, Depreciation, Amortization Schedule, making it the premier financial calculator software. It also incorporates a powerful tape display that can be annotated, date/time stamped, and saved for later use. BizCalc is an indispensable tool for business, retail, finance, banking, real estate, and leasing industry professionals.

Available: Pocket BizCalc for Windows CE (Mobile Device, Handheld PC, Pocket PC, and Desktop BizCalc for Windows 98/SE/ME/2000/NT/XP

◆ Pocket and Desktop MBA-Calc

MBA-Calc is an advanced, full-featured **Algebraic** business and financial calculator. MBA-Calc operates like the **Texas Instruments BA-II Plus** handheld calculator and incorporates many of its features and a number of additional ones. MBA-Calc features algebraic equation entry and prompted dialog box and entry fields for all financial and statistical calculations, making it unnecessary to memorize function key sequences. Results of calculations can be pasted into other applications. MBA-Calc is also an indispensable tool for business, retail, finance, banking, real estate, and leasing industry professionals.

Available: Pocket MBA-Calc for Windows CE (Mobile Device, Handheld PC, Pocket PC) and Desktop MBA-Calc for Windows 98/SE/ME/2000/NT/XP.

Code: 2L18

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System Requirements

This chapter covers the system requirements for On-Schedule Sync and Pocket On-Schedule v5.

System Requirements

- **For the mobile device:**
 - Any Handheld PC running Windows CE 2.11.
 - Most mobile devices running Windows CE 3.0 or Windows CE.NET
 - Processor support for Xscale, StrongARM, MIPS, X86, SH3/4
 - Complete installation requires up to 4MB of storage memory and 6MB of application memory depending on configuration
 - The number of records that can be stored depends on the available RAM storage size
 - Serial port, USB, IRDA connection to desktop PC required for synchronization.
- **For the desktop PC:**
 - Any PC with Pentium or higher microprocessor
 - 3.5" floppy disk drive or CD-ROM
 - 32 MB of RAM
 - VGA monitor or higher
 - 2 MB of available hard disk space for installation
 - Microsoft Windows 98/SE/ME/NT 4.0/2000/XP with Microsoft ActiveSync 3.1 or higher installed

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Getting Started

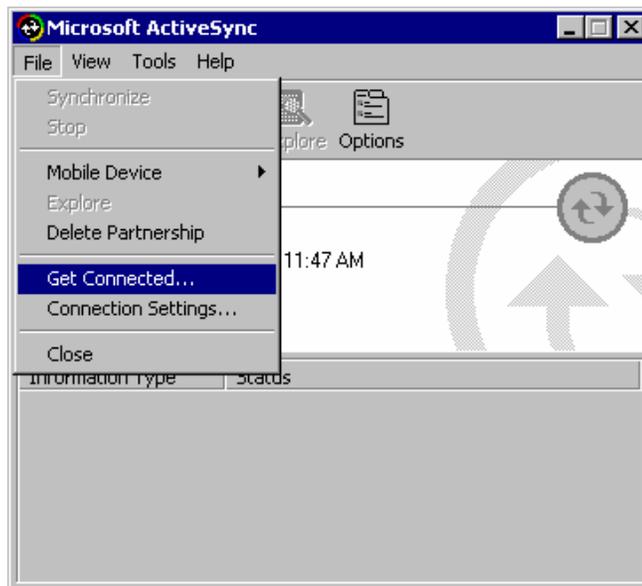
Important: You will need to install Microsoft ActiveSync 3.1 or higher before you run the On-Schedule Sync setup. The Microsoft ActiveSync setup may be available from the CD-ROM that was shipped with your mobile device or you can download it from the Microsoft website. Please refer to the ActiveSync Help files for detailed instructions on how to install and run ActiveSync.

How to make a Microsoft ActiveSync connection.

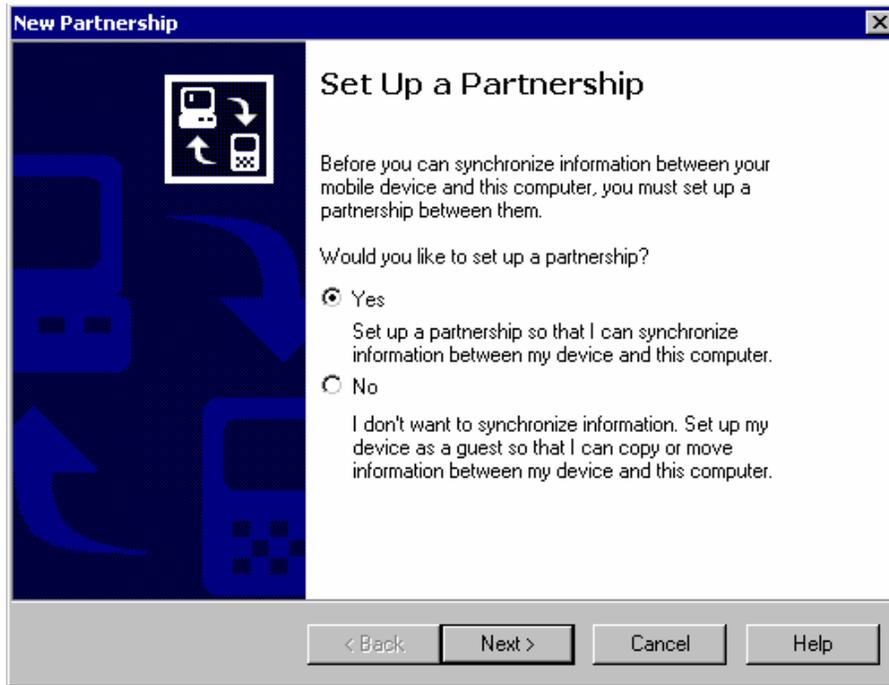
To establish a connection between the desktop PC and the mobile device

When you connect your mobile device to the desktop using a sync cable for the first time, ActiveSync will automatically attempt to connect the desktop PC and mobile device. A window will be display give you a window asking to set up a partnership or set up the device as a guest. If a connection is not automatically made, you can connect the desktop PC and mobile device manually by:

1. Starting ActiveSync on the desktop PC.
2. Clicking on **File > Get Connected**.



If you are connecting for the first time, the following New Partnership Window will be displayed asking to set up a New Partnership for the device or as a Guest.



1. You can either click on Yes to set up a partnership or No to set up the device as a Guest. If you want to set up a partnership, click on Yes and then type in a name for the device in the next window. Then click on Next when you are asked to Select Synchronization Settings. Synchronization settings will be set in the On-Schedule Sync application. Then click on Finish to complete the ActiveSync partnership setup. You should see the following window. The green circle on the right indicates that the device has been connected successfully to the desktop.



If you have created a partnership, you will not have to go through the ActiveSync initialization screens each time you connect the device to the desktop.

2. The Guest connection is only a temporary connection. Once the device is disconnected and reconnected, the New Partnership Window will be displayed and you will have to repeat the above steps again.

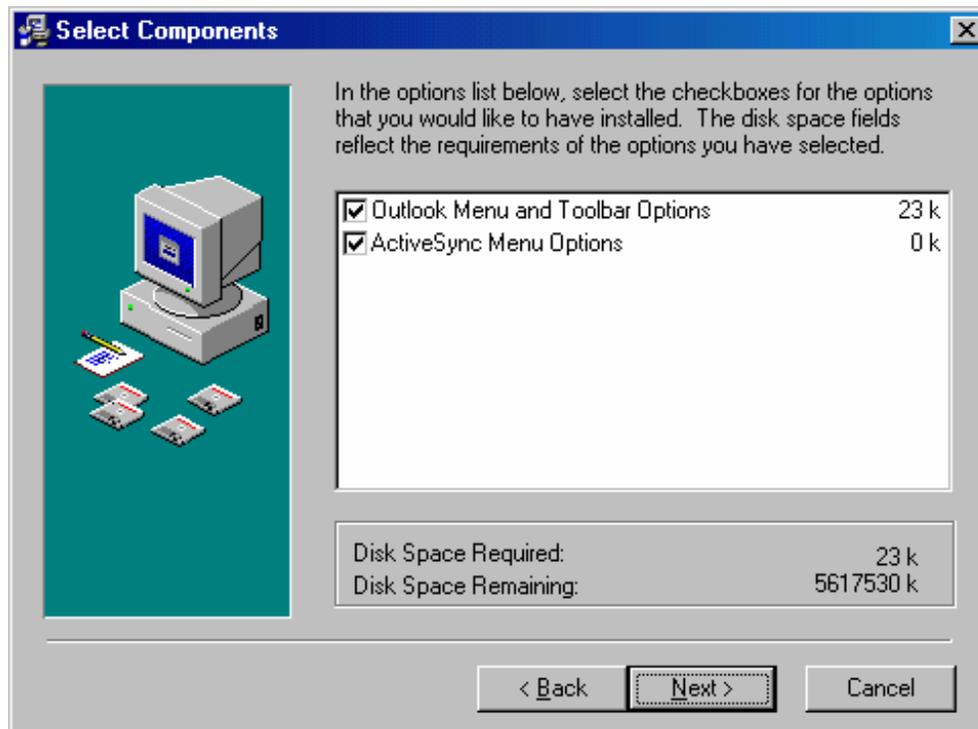
Installing On-Schedule Sync

Make sure that your device is connected successfully to the desktop PC before running the setup file for On-Schedule Sync. The Sync setup will install files on your desktop PC and copy some files to the mobile device. If your device is not connected when you run the setup, those files will be copied over the next a connection is established between the mobile device and the desktop.

To install On-Schedule Sync on your desktop PC, double click on the **h2ksyncoemsetup.exe** file. The name of the Sync setup file that you are provided may be different. If you are unsure of the correct setup file to run, please visit our website at www.odysseyinc.com to download the latest setup file.

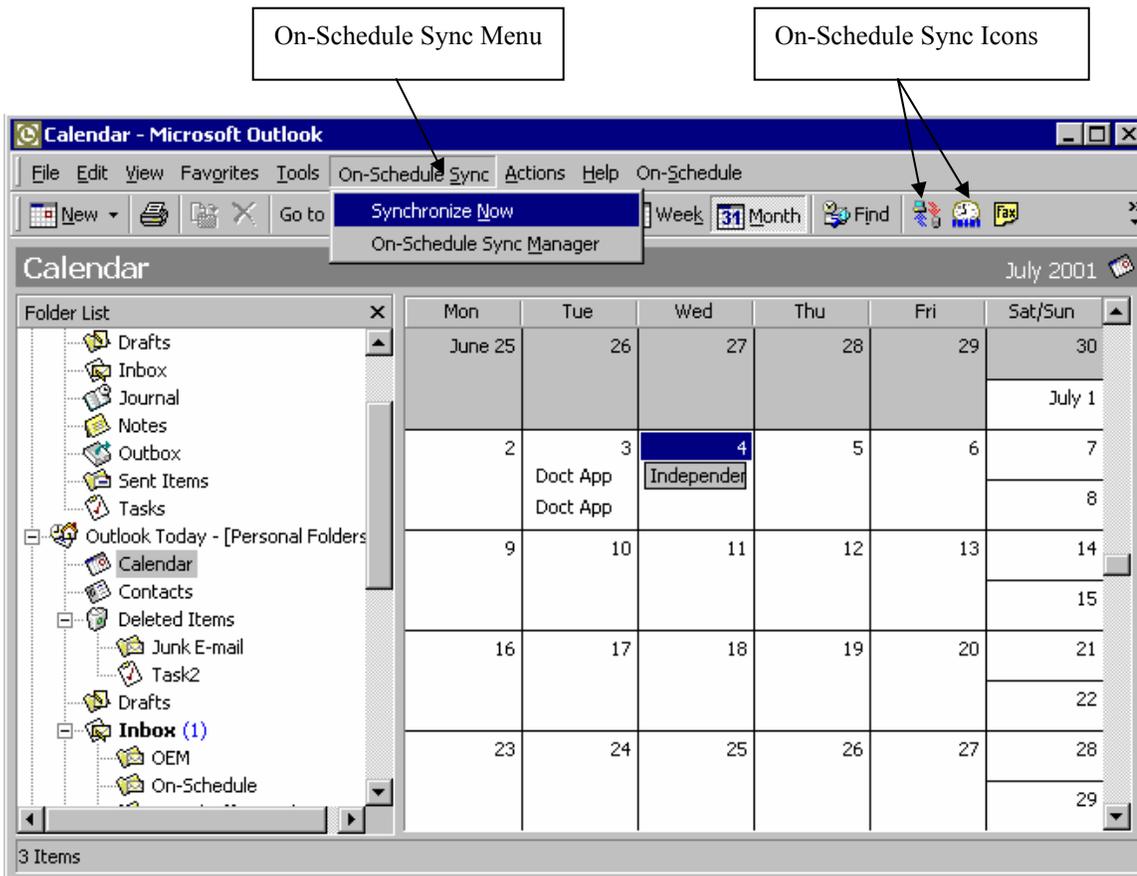
Follow the instructions on the windows that appear on your desktop PC after you have launched the setup program. It is recommended that you choose the default settings during the installation.

During the setup, you will see the following screen.



- Check the **Outlook Menu and Toolbar Options** box if you would like to install On-Schedule Sync menu and Toolbar icons into Microsoft Outlook.
- Check the **ActiveSync Menu Options** box if you would like to install On-Schedule Sync menu options into Microsoft ActiveSync.

If you have checked the **Outlook Menu and Toolbar Options** box, On-Schedule Sync setup will install an On-Schedule Sync menu together with an On-Schedule Sync icon  and a Synchronize Now icon  in Microsoft Outlook.



Running On-Schedule Outlook Sync

To launch On-Schedule Outlook Sync:

1. Click on **Start > Programs > On-Schedule > On-Schedule Outlook Sync**
- OR**
2. Click on the On-Schedule Sync icon  in Microsoft Outlook.
- OR**
3. Click on **On-Schedule Sync > On-Schedule Sync Manager** in Microsoft Outlook.

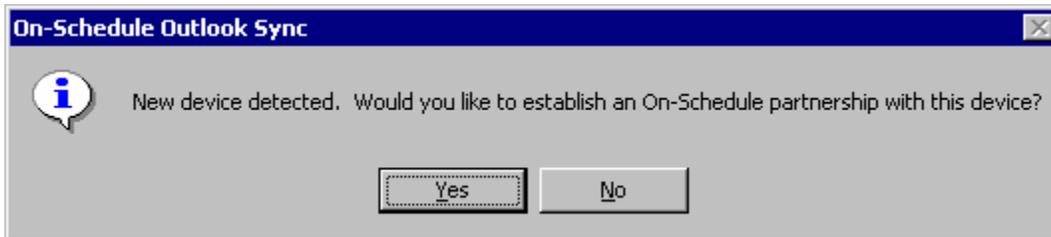
To launch On-Schedule Outlook Sync and synchronize automatically using your predefined settings:

1. Click on the Synchronize Now icon  in Microsoft Outlook.

OR

2. Click on **On-Schedule Sync > Synchronize Now** in Microsoft Outlook.

The first time you run On-Schedule Sync, you will see the following window:



Click on Yes to proceed. The On-Schedule partnership keeps track of the items to be synchronized between the desktop PC and the device. You can create multiple On-Schedule partnerships between one desktop PC and multiple mobile devices. However, you will not be able to create multiple partnerships between one mobile device and several desktop PCs.

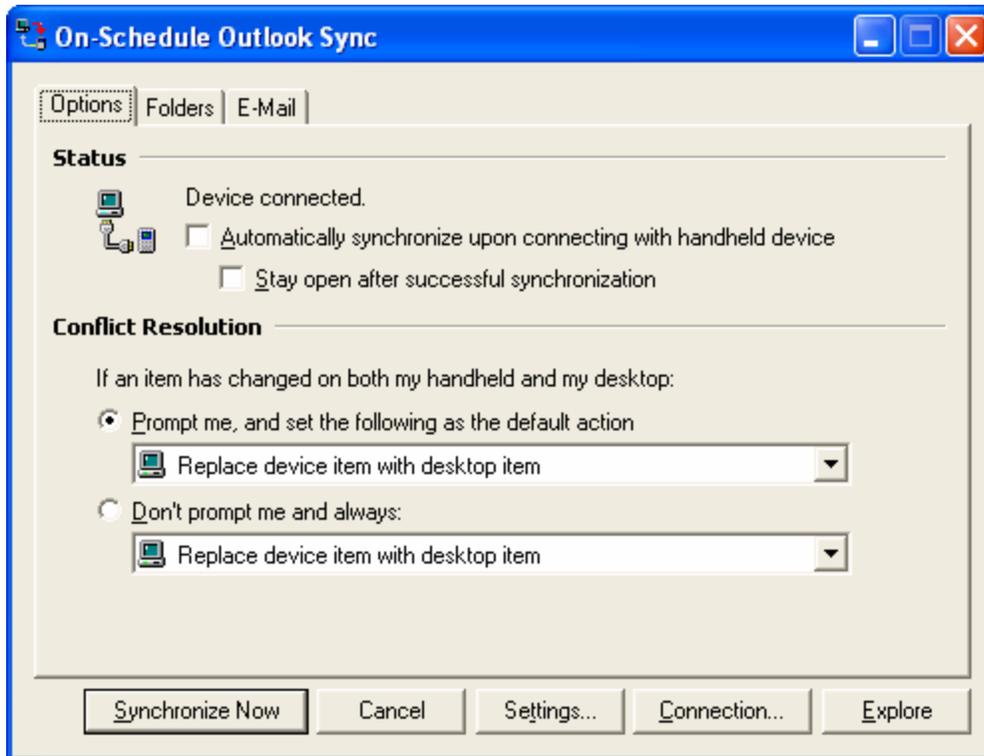
The On-Schedule Outlook Sync for Windows CE main dialog box will have the following three tabs:

- An **Options** tab for specifying preferences for conflict resolution.
- A **Folders** tab which lets you select and map the folders to synchronize. This tab displays all the available databases and folders and lets you specify your preferences and database selection before you start the synchronization process.
- An **Email** tab, which allows configuration of items to be transferred between Pocket On-Schedule and Microsoft Outlook.

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Options Tab

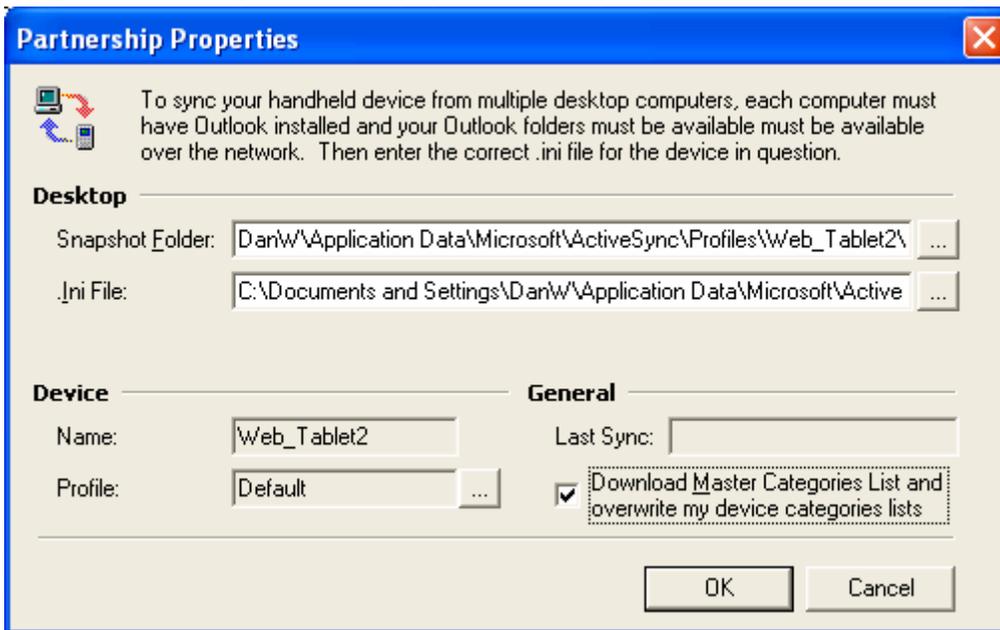
This tab has options on when and how to perform synchronization. It allows you to set up preferences and customize On-Schedule Sync to handle data conflicts. When all your settings have been finalized in other tabs, click on the Synchronize Now button to start synchronizing data back and forth.



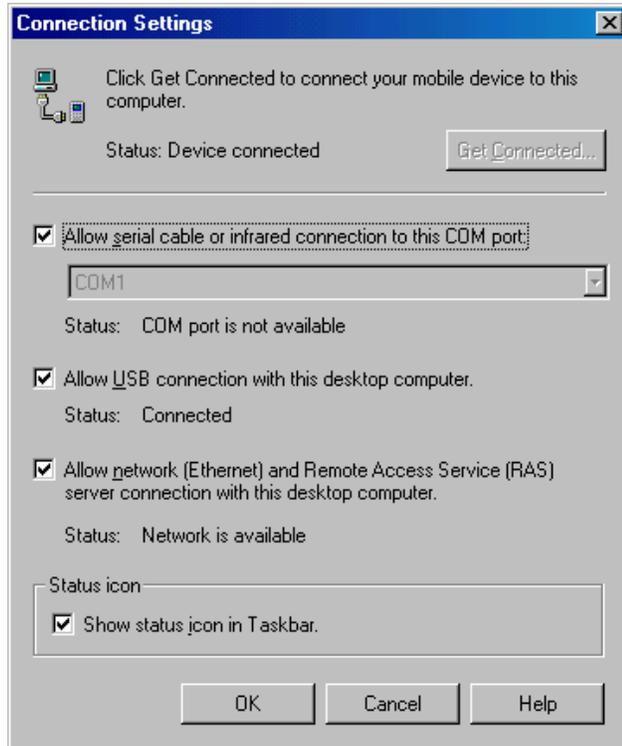
Status

- If your mobile device is properly connected, the Status box will display this message: “Connected to Mobile Device”.
- If your mobile device is not connected, the Status box will display this message: “Waiting for device to connect.”

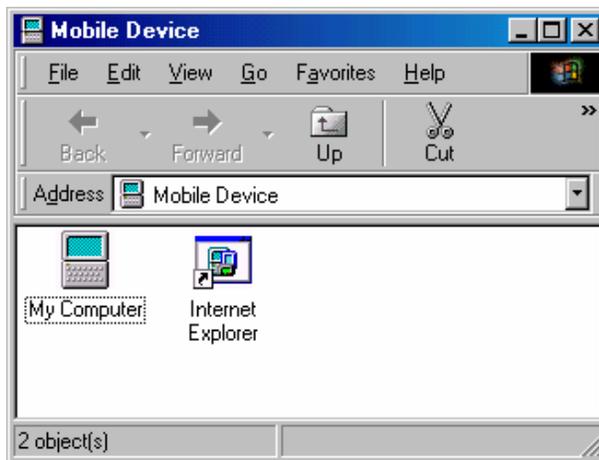
- Data can be synchronized automatically or manually. If the **Automatically synchronize upon connecting** box is checked and a connection is established between the mobile device and the desktop PC, On-Schedule will automatically synchronize any pre-selected folders. In addition to an ActiveSync Partnership, On-Schedule Sync will work even if the device is connected as a Guest.
- If the **Stay open after successful synchronization** is checked box is checked, this dialog box will remain open after synchronization is completed.
- The **Conflict Resolution** settings let you set the default actions in the event of a data change conflict. This conflict occurs if the same field for the same item has changed on both the mobile device and on the desktop. *For more information on Conflict Resolution, see page 14.*
- You can click on **Synchronize Now** to start the synchronization of the folders that have been selected and mapped to the mobile device.
- Click on the **Settings** button to display the Partnership Properties.



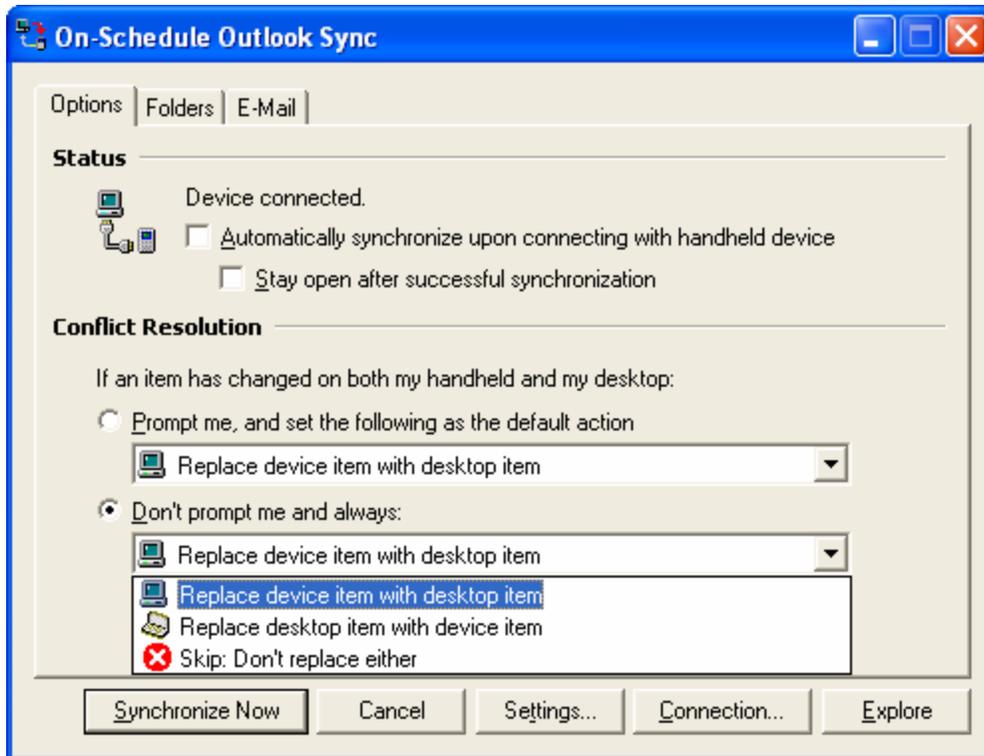
- Click on the **Connection** button to view the connection settings for the device.



- Click on **Explore** to view the files on the mobile device and to copy files between the device and the desktop.



Conflict Resolution



On-Schedule Outlook Sync for Windows CE provides several options for resolving conflicts. A conflict happens when the same data field has been modified on both the desktop and the mobile devices. Conflict resolution ensures that your information is always accurate and up-to-date, no matter how many times you transfer items. There are two ways to handle data conflicts. You can handle data conflicts interactively by being prompted for an action or have On-Schedule Outlook Sync automatically handle the conflict without prompting you.

***NOTE:** Since synchronization is at the field level, there is no data conflict if the same record is changed on both the desktop and device but on different fields. For example, assuming Joe Smith's phone number was modified on the desktop while his e-mail address was modified on the device. During synchronization, you will not be notified of a conflict resolution for his record. His new phone number will be automatically transferred to the device and his new e-mail address will be transferred to the desktop.*

Manual Conflict Resolution

To resolve conflicting items interactively:

1. From the **Options** tab, check the option Prompt me, and set the following as the default action.

2. From the default actions list, change the settings to reflect your preference:



Desktop item to replace the Mobile device item.



Mobile device item to replace the Desktop item.



Skip and don't replace either item.

3. Once you are satisfied with your settings, click Synchronize Now to carry out the actions you specified.

***NOTE:** In this configuration, you will be given the option of changing which item is replaced when a conflict occurs. When the Conflict Resolution dialog box appears, the above action will be set by default for all conflicting items.*

Automatic Conflict Resolution

To automatically handle data conflicts:

1. From the **Options** tab, check the option *Don't Prompt me, and always*.
2. From the default actions list, change the settings to reflect your preference:



Desktop item to replace the Mobile device item.



Mobile device item to replace the Desktop item.



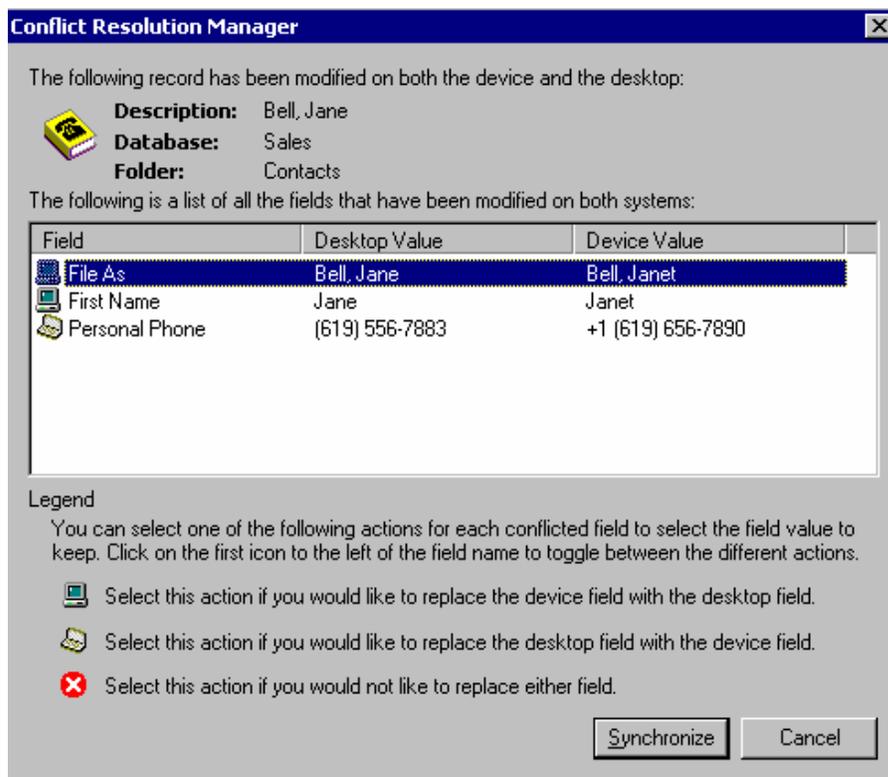
Skip and don't replace either item.

3. Once you are satisfied with your settings, click Synchronize Now to carry out the actions you specified.

***NOTE:** In this configuration, you will not be given the option of changing which item is replaced when a conflict occurs. The conflict will be resolved automatically without ever displaying the Conflict Resolution dialog box.*

Resolving Conflicts

If On-Schedule Sync is configured to prompt you in case of data conflicts, the Conflict Resolution dialog box will appear when data conflict occurs during synchronization:



The following is shown in the Conflict Resolution dialog box:

- The description of the record being processed.
- The name of the database that contains the mobile device record being processed.
- The name of the folder that contains the record being processed.
- A list of all conflicting fields for the record currently being processed. For each conflicting field, the field name, the mobile device value, and the desktop value are displayed.

To resolve conflicting items:

1. For each field in the list, click the icon to the left of the field name to choose the appropriate action. When the dialog box first appears, the default action is displayed. See *the Options Tab section on page 14* on how to change the default action.

The following actions are available:

- Select this action to replace the Mobile Device item with the Desktop item.
- Select this action to replace the Desktop PC item with the Mobile Device item.
- Select this action to skip and not replace either item.

2. When you have selected the appropriate action for each item in the list, click Synchronize Now to carry out the actions you specified.

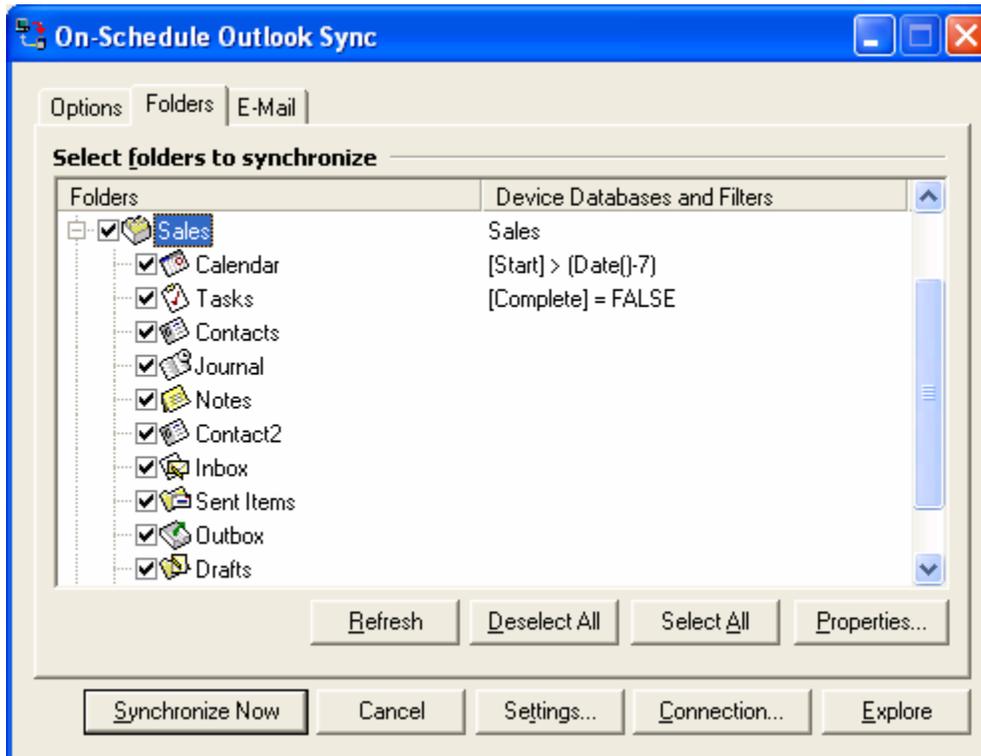
***NOTE:** Since synchronization is at the field level, there won't be any data conflict if different fields in the same record are modified on both the handheld and desktop PCs. The modified fields will be automatically updated.*

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Folders Tab

The Folders tab allows you to select the folders to synchronize between Microsoft Outlook and Pocket On-Schedule. You can also set filters to synchronize only a subset of items.

The left hand side of the dialog box shows the tree structure of the Microsoft Outlook folders on the desktop PC. Check the box next to the name of the folder in Microsoft Outlook that you would like to synchronize.



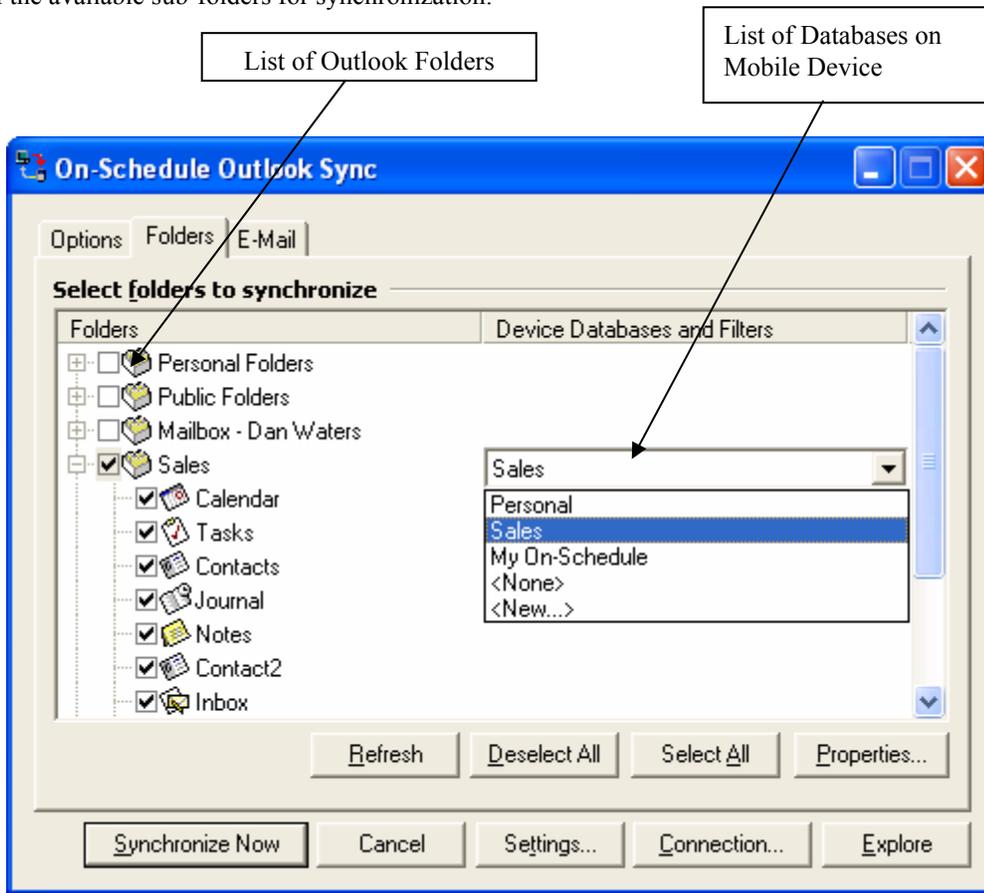
Folder Tab Buttons

- **Refresh:** Reloads the folder tree from Microsoft Outlook.
- **Deselect All:** Removes check mark selections on all folders.

- **Select All:** Checks all folders for synchronization.
- **Properties:** Displays the Name, Path and Database Type of the selected database when database name is highlighted. Highlight individual folders to view folder properties.

Folder Selection

The Folders Tab displays the available Outlook databases on the tree displayed in the Folders List. The sub-folders of a main personal folder will be displayed by pressing the + sign on the hierarchy to expand and display the sub-folders. The folders that may be synchronized to Pocket On-Schedule will have selection boxes next to the folder name. Click on the box to select it for Synchronization. Click on the marked box to deselect it for synchronization. You may also use the **Select All** button to mark all the available sub-folders for synchronization.



Folder Properties

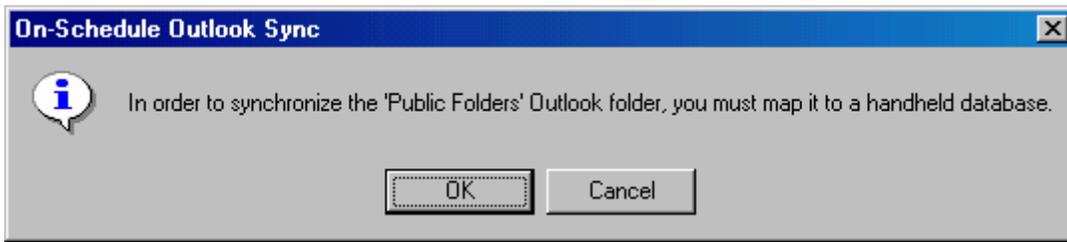
Click on the Properties button to display the Properties for the selected folder. From the Properties dialog you can:

- Mark the folder for Synchronization
- View the date and time of the last completed synchronization of the folder. It is not advisable for you to change this date and time, even though you can change this date and time. This may result in duplicate items or skipped items.
- Reset the folders snapshot and synchronization history. Click on the Reset button to delete any record of previous synchronization actions. The next synchronization will be as if the folder is being synchronized for the first time. This may result in duplicate items. *For more information on resetting database snapshots, see page 24.*
- Add and Remove filters for the folders. Click on the Filter button to select or create filters to use during synchronization. Synchronization filters are only applied to the mobile device. For example, if you synchronize using a filter for Contacts in California, only Contacts where State = California will be sent to the device. However, all newly added contacts will be transferred from the device to the desktop PC before being removed from the device. *For more information on Synchronization Filters, see page 25.*

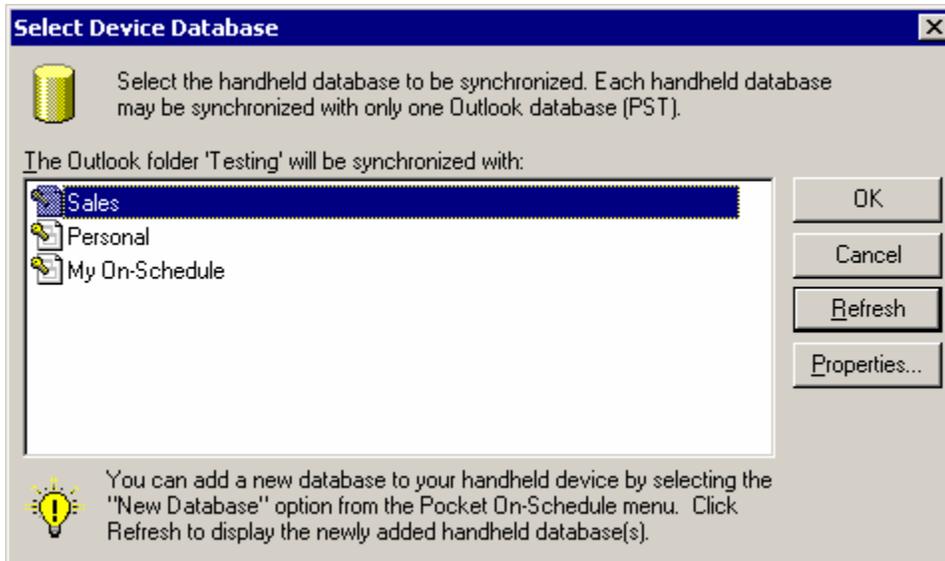


Database Mapping

When performing synchronization of a folder for the first time, the following message will appear to notify you that a corresponding database on the mobile device has to be mapped to the database containing the folder that you would like to synchronize with on the desktop PC.

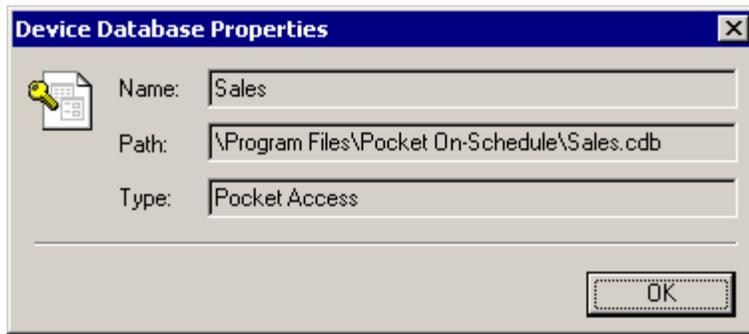


Click on OK to display the following screen that lists the available databases for synchronization. Highlight the appropriate handheld database from the list and then click on the OK button to the right.



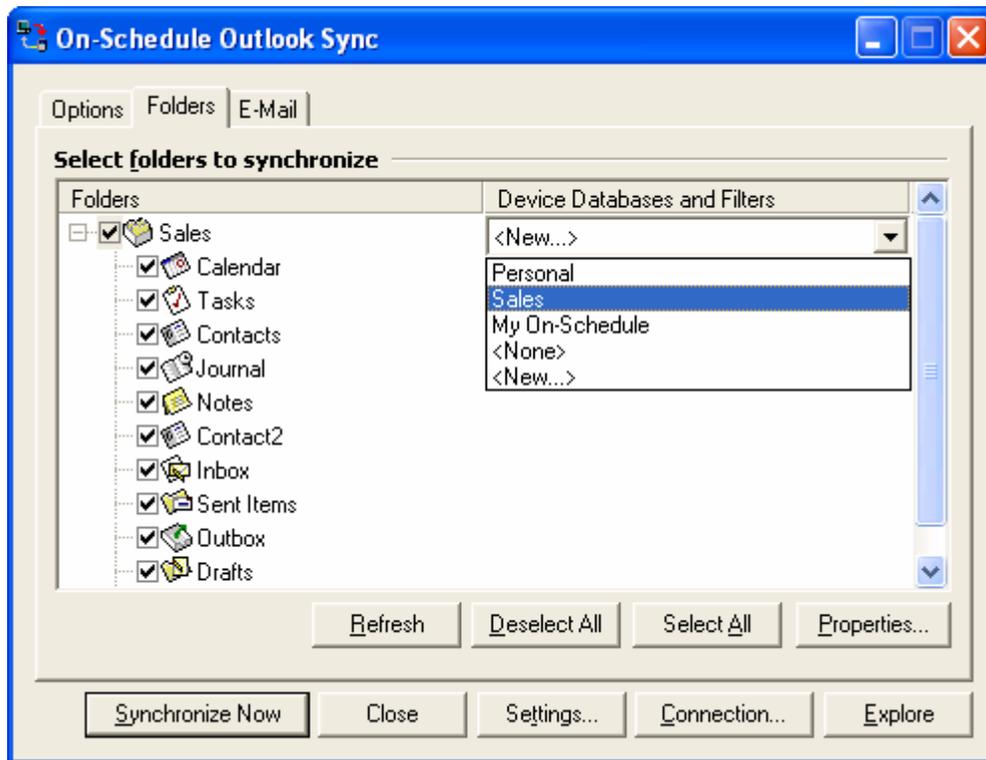
- **OK** button will map the highlighted database.
- **Cancel** button will close Select Database dialog.
- **Refresh** button will reload the database list from the device.
- **Properties** button will display the Name, Path and database Type of the selected database.

If you don't see the desired database on the device you can add a new database to your handheld device by selecting the "New Database" option from the Pocket On-Schedule menu. Click Refresh to display the newly added handheld database.



Mapping can also be done by clicking on the previously selected database in the Device Database and Filters column.

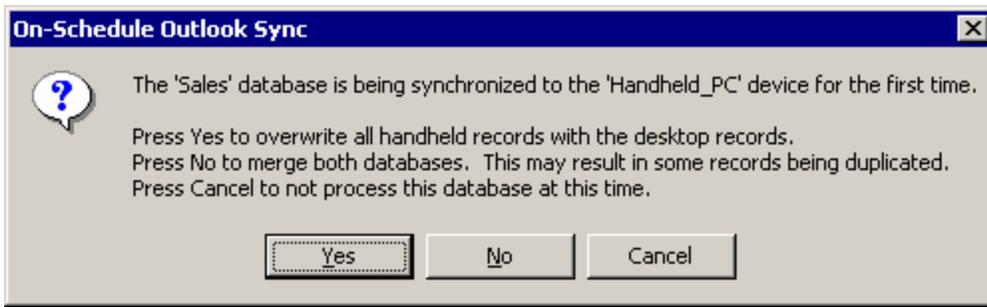
- Select the database name from the list to change the mapped database (Note: each database may only be mapped to one Outlook database (.pst file).
- Select <None> to cancel the mapping for the selected Outlook database (.pst file).
- Select <New> will bring up the Select Device Database dialog with the listing of available databases. This will also delete the snapshot if this database was previously mapped and may result in duplicate items being synchronized.



Merging

When synchronizing a device database or folder to the desktop for the first time you will receive the following message that verifies how you wish to handle the initial merging of information

- Selecting **Y**es will overwrite the device database information with the desktop records. This should be used if you want all device records to be replaced with the desktop's, and delete any records on the device database or folder that is not contained in the desktop database or folder.
- Selecting **N**o will merge both the device and desktop database or folder information. This should be used if you have some records on the device that you wish to merge with the desktop database. This will also create duplicate records of those that were contained on both the device and the desktop.
- Select **C**ancel if you don't want to process this database at this time, or if you want to verify which merging option you want.



Resetting Database Snapshot

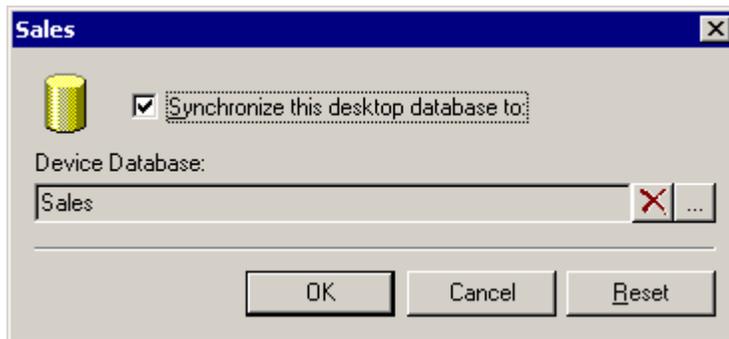
On-Schedule Outlook Sync uses the snapshot of the database to verify that records have been changed since the last synchronization. Only the changed record will then be processed instead of completely processing the database on subsequent synchronizations.

You may need to reset the snapshot of the database:

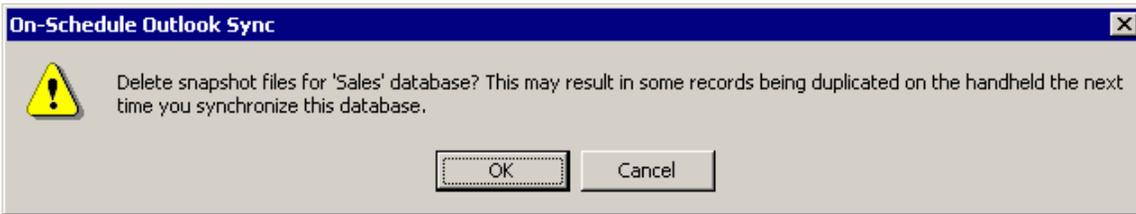
- If you want to overwrite all information on the device database with the desktop records.

To reset the snapshot for the device database:

- Select the database name (i.e. the root item) in the **Folders** tab of the On-Schedule Sync application
- Click the **Properties** button to bring up the following dialog



- Click **Reset** and you will receive a message asking to confirm deletion of the snapshot.



- Selecting **OK** will delete the previous snapshot and upon synchronization the database will be treated as if it is being synchronized for the first time and you will be asked which merging option you want to process with.

Resetting Folder Snapshot

To reset a folder snapshot and synchronization history:

1. Select the folder to reset
2. Click on the **Properties** button to display the Properties for the selected folder.
3. Click on the **Reset** button to delete any record of previous synchronization actions. The next synchronization will be as if the folder is being synchronized for the first time. This may result in duplicate items. *For more information on resetting database snapshots, see page 24.*



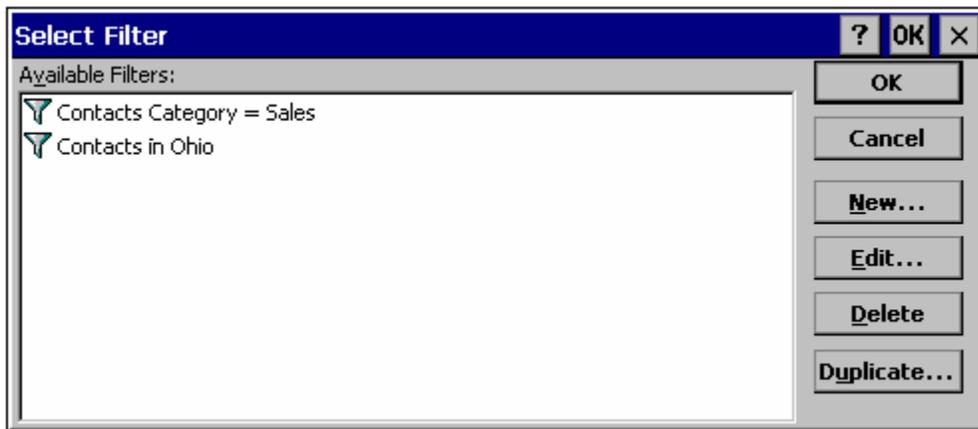
Synchronization Filters

Filters are a set of criteria used to screen data prior to synchronization. For example, you can simply create a filter that will select only the contacts in California. Then, from the folder properties button of the

On-Schedule Outlook Sync Folders dialog box, you can select that filter for the desired contact list. Only the contacts that match the filter criteria will be synchronized with the mobile device. Filters can therefore be created to restrict or control which records are synchronized with your databases and can be as simple as transferring only those people who live in a certain state, or as complex as transferring appointments that are scheduled for the past and next 14 days.



Clicking on the Filter button will display the Select Filter dialog box.



1. Select the filter you wish to use and tap OK. The chosen filter will be applied to the current view. Filters are view specific, therefore, if you create a filter in the contact list, it will not be available in the task list. You can also manage your filters from this dialog box. Editing, Duplicating, or Deleting a filter is as simple as highlighting a filter and pressing the appropriate button.

When in the Filter Editor dialog box, you can:

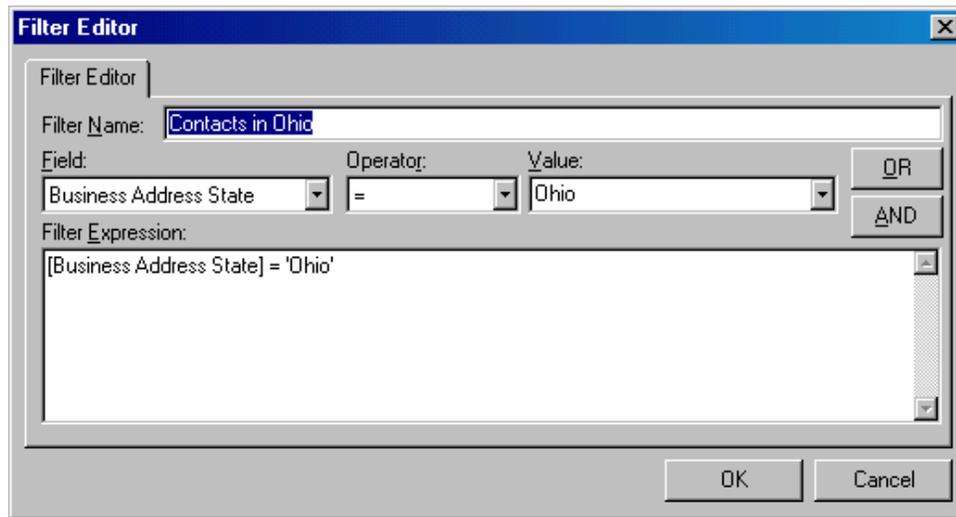
- Enter a name for your filter Under Filter Name.
- Select a field from the list you wish to filter on.

NOTE: Only fields from the current view will be available for use.

- Choose an Operator to use.

The different options are:

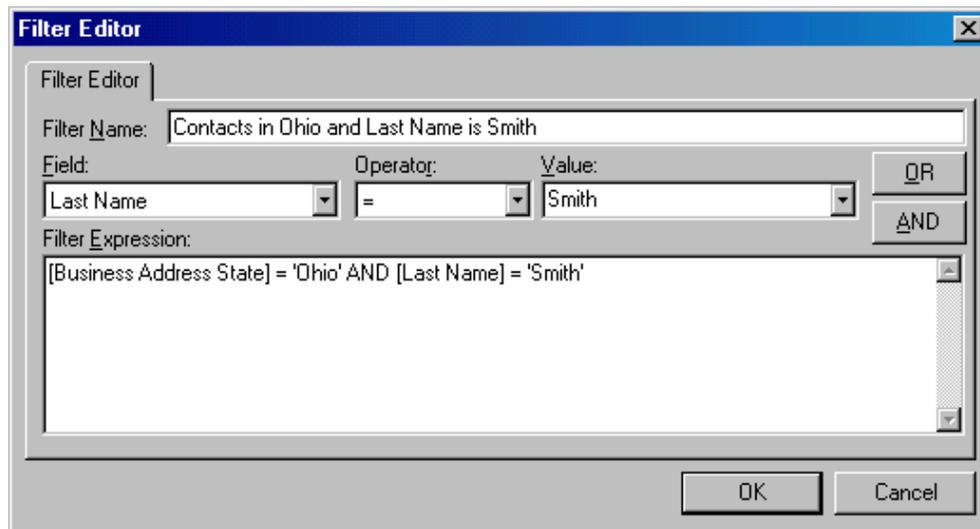
- = - Equal to
- <> - Not equal to
- > - Greater than
- >= - Greater or equal to
- < - Less than
- <= - Less than or equal to



NOTE:

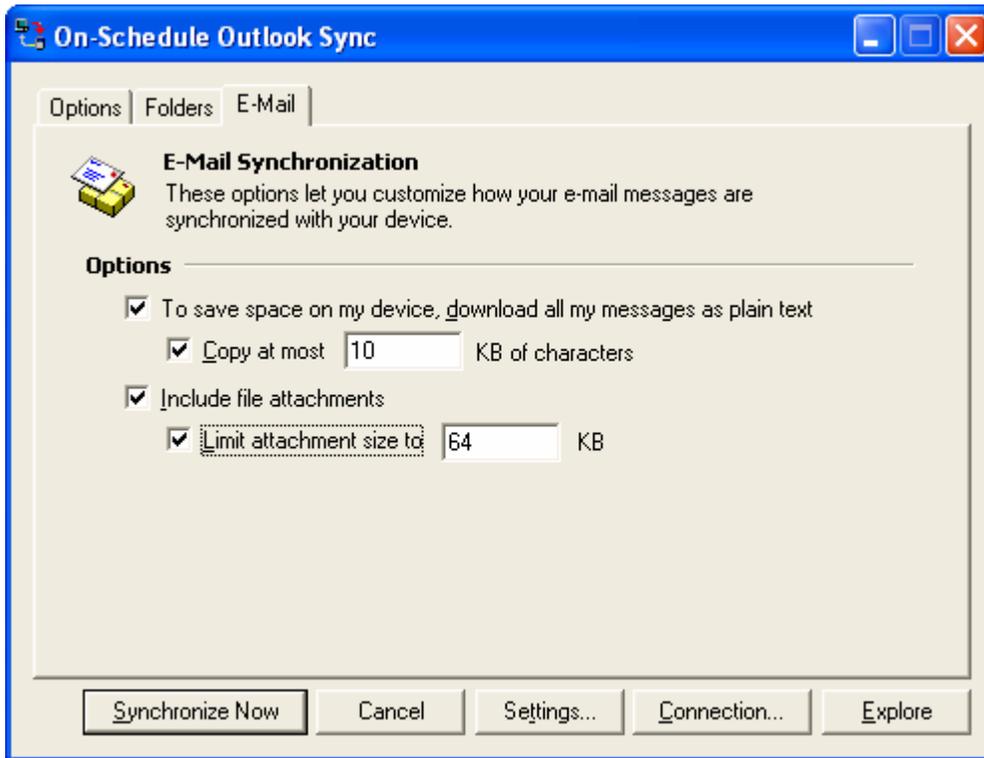
- Tap **OK** to save your filter, or click on Cancel to cancel the operation.

You can also create filters with multiple filter expressions using the “AND” or “OR” buttons. These buttons will only appear after the first filter expression has been added. The “AND” function will check that all expressions are satisfied while the “OR” function will display records that meet at least one of the filter criteria.



6

Email Tab



With the Email Options, you will be able to setup the synchronization of your Pocket On-Schedule Email folders to Microsoft Outlook on the desktop PC companion

Options

- If the **To save space on my device, download all my messages as plain text** is checked, the fonts and formats of your messages will be downloaded as plain text. This can conserve memory space on your device.

- If the **To save space, copy at most __ KB characters** box is checked, you can specify the maximum number of characters of an e-mail message that is to be downloaded to the mobile device. This will prevent unknowingly downloading extremely long messages, which may use up all the memory space on the mobile device. If this box is unchecked, then the entire e-mail message is transferred to the device.
- If the **Include file attachments** box is checked, the synchronization engine will transfer any file attachments with the e-mail message. If this box is unchecked, no file attachments will be transferred.
 - You can limit the attachments to transfer by checking and specifying **Limit Attachment Size to __KB** option. If there is not enough memory space to download the attachment, it will not be included when the e-mail is transferred to the mobile device. (*Note: Only attachments that are less than or equal to 64kb in size may be downloaded*)

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