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# CorporateSync 1.1.3 for Pocket PC User's Guide

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CorporateSync 1.1.3 for Pocket PC User's Guide  
January, 2001

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Steltor Int Inc.  
e-mail: [info@steltor.com](mailto:info@steltor.com)  
web site: <http://www.steltor.com>

2000 Peel Street  
4th Floor  
Montreal, Quebec  
H3A 2W5 Canada

tel: (514) 733-8500  
fax: (514) 733-8878

# Contents

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## **Chapter 1 • Introduction to CorporateSync 5**

- A word about terms 5
- System Requirements 5
- Installing CorporateSync 6
- Using the CorporateSync menu 6
- Limitations 7
- Avoiding Problems 7

## **Chapter 2 • Using CorporateSync 9**

- Synchronizing for the first time 9
- Steps for remote synchronization 10
- Setting your identity 11
- The synchronization range 12
- Synchronizing Events 12
- Synchronizing Tasks 12
- Synchronizing Contacts 12
- Conflict Resolution 13

## **Chapter 3 • Troubleshooting 15**

- Connection Problems 15
  - I cannot get my hand-held to connect. 15
  - I cannot start synchronization. 15
  - It is taking too long to synchronize. 16
- Entry Problems 16
  - Some hand-held Entries do not appear in my calendaring application after synchronizing. 16
  - Some Entries do not appear on the hand-held after synchronizing. 16
  - I keep getting multiple copies of my Entries. 16
  - Changes I made to an Entry on my hand-held were not transferred to my calendaring application. 17

When I use my hand-held to modify a repeating Entry created on the calendar server, some of the changes are applied to all instances of the Entry, while others only to the instance I modified. *17*

I am having trouble with repeating Events created on my hand-held. *17*

I want to delete all Entries on my hand-held. *18*

There is an extra 'x' or '#' beside some extension numbers on my hand-held. *18*

Other Problems *18*

My hand-held keeps freezing up. *18*

How do I delete CorporateSync from my hand-held? *18*

Why is "Synchronize Now" disabled? *18*

## **Appendix A • Field Mapping *19***

Entries *19*

Tasks *22*

Address Book Entries *24*

Address Book Numbers *25*

# 1

## Introduction to CorporateSync

CorporateSync allows you to transfer data between your calendar application and your Pocket PC hand-held device.

### A word about terms

*Calendar server* refers to the server where all Entries (Meetings, Day Events, Daily Notes, Tasks and Holidays) are stored. *Calendar application* refers to the application you use to create, edit or delete these Entries (CorporateTime, OpenTime or Lexacom Calendar). In cases where Entries are discussed, *calendar server* and *calendar application* are used interchangeably. Where Address Books are discussed, only *calendar application* is used, as CorporateSync can only synchronize Address Books that exist locally on a user's machine and not on the server.

## System Requirements

Hand-held:

- Supported devices:
  - Pocket PC (Windows CE 3.0) with MIPS, SH3 or ARM processor

Server:

- CorporateTime Server 4.0 or greater, or Netscape Calendar Server 3.5.x or greater

Desktop:

- Microsoft Windows 95, 98, 2000, ME or NT 4.0
- Intel Pentium or compatible
- 7 MB hard disk space (10 MB recommended)
- 16 MB RAM (Windows 95, 98) or 24 MB RAM (2000, ME, NT)
- CorporateTime 4.2 +
- ActiveSync 3.0 +

## Installing CorporateSync

To install this application run the setup program provided with the distribution and follow the on-screen instructions:

- In the single file package, the setup program is the packaged ".exe" file.
- On the cd-rom or floppy disk, the setup program is called "setup.exe"

Installing CorporateSync places files on both the local (desktop) machine and the hand-held. Both the desktop and hand-held components must be installed in their respective locations for this product to function correctly. After installing CorporateSync on your Pocket PC, you must perform a soft-reset to complete the installation procedure.

## Using the CorporateSync menu

The CorporateSync menu appears when you right-click the CorporateSync icon located in the Task Bar's system tray. The following commands appear in this menu:

- About: Lets you view information about this CorporateSync release
- Help: Opens the Help file
- View Log: Opens the CorporateSync for Pocket PC Log.
- Synchronize Now: Synchronizes your calendar application with your hand-held.
- Properties: Opens the CorporateSync Properties for Pocket PC dialog box, allowing you to enter your synchronization settings.
- Communication: Opens the ActiveSync connections settings window.
- Exit: Closes CorporateSync.

## Limitations

- You cannot synchronize your hand-held's Repeating Events. You can, however, synchronize calendar server Repeating Entries.
- You cannot synchronize Address Book Entries if your calendar application is open on your PC.
- The Address Book must be stored on the PC you are connecting to.
- CorporateSync is unable to present a list of possible matches for duplicated names. To avoid this problem, enter as much unique user information as possible (e.g. organization unit, etc.).

## Avoiding Problems

- When possible, create and modify your Entries on the calendar server. This is especially recommended when dealing with Repeating Entries.
- Choose Refresh All on the calendar server after synchronizing.
- Do not set your calendaring application Entry Defaults to "Personal".
- Do not modify, delete or create Entries in your calendaring application or Pocket PC during synchronization. This may result in the loss of data.
- Do not disconnect the device while synchronizing. This may result in the loss of data. Instead, stop the synchronization which allows the synchronization to shut down. Then, disconnect the device.
- It is recommended that users have at least 5MB of hard disk space available.



# 2

## Using CorporateSync

### Synchronizing for the first time

1. After installing CorporateSync on your Pocket PC, you must perform a soft-reset to complete the installation procedure.
2. Select Start/Settings, click on the System tab and then click on CorporateSync Settings to open the user settings dialog box on your Pocket PC.
3. Enter your calendar server user name in the User Name field.  
Note: You do not have to enter your full name. Enter enough characters to distinguish yourself from all other users on your server.
4. Enter the calendar server name in the Server field.
5. Enter the calendar server node number or node alias in the Node field.
6. Click Set Password to open the Set Password dialog box.  
Enter your calendar server password and click OK.
7. Select the Sync Range tab of the dialog box to define the synchronization period. Enter From and To values to define the range.
8. Select the Events tab and set your Event options.
  - Select "Synchronize Refused Events" to transfer Meetings, Daily Notes and Day Events that you refused.
  - Select "Show Attendees" to transfer the names of users and resources invited to your Meeting (maximum of 12 attendees).
  - Select "Limit Event Details" to limit the size of Meeting Descriptions that are transferred. When selected, you can enter the maximum number of Kilobytes that will be transferred (maximum of 32k).
9. Select the Tasks tab and set your Task options.
  - Select "Synchronize Completed Tasks" to transfer all Tasks.
  - Select "Limit Task Details" to limit the size of Task Comments that are transferred. When selected, enter the maximum size (maximum of 32k).

10. Select the Contacts tab and set your Contact options.
  - Select "Synchronize Contacts with" to transfer Contact information and enter your Address Book name (not case sensitive). You may only synchronize with one Address Book.
  - Select "Limit Contact Details" to limit the size of Address Book Contact information that is transferred. When selected, enter the maximum size that can be transferred (maximum of 32k).  
Note: In order to synchronize Address Book Entries, your calendaring application must not be open on your PC and you must have an Address Book on it.
11. Choose "Communications" from the pop-up menu that opens when you right-click the CorporateSync icon on your Taskbar's system tray.
  - Select "Device Connection via Serial Port" to synchronize by serial cable or USB connection.
  - Select "Device Connection via Network" if you plan to synchronize remotely through a network or modem connection.
12. If you do not plan to synchronize with other applications:
  - Open ActiveSync and select Options. Deselect all Synchronization Services that will not be used.
  - If synchronizing remotely, select "Enable Synchronization".

## Steps for remote synchronization

For Remote Synchronization to work, both ActiveSync and CorporateSync for Pocket PC must be installed and running on a workstation on the same network as the calendar server. The network card for Pocket PC also needs to be installed on your handheld device.

ActiveSync does not support multiple simultaneous device connections. It is recommended that ActiveSync and CorporateSync for Pocket PC be installed on as many workstations as Pocket PC devices.

1. Establish a network connection using a network cable or modem.
2. Choose Start > Programs > Communications > ActiveSync on your device.
3. Select the default type of connection:
  - Choose "Network Connection" if connecting via cable.
  - Enter the network domain name if connecting via modem.

4. Select the computer to connect to. That computer must have ActiveSync and CorporateSync for Pocket PC installed and running. That computer must have previously established a partnership with the device through a connection using a serial cable or USB connection.
5. Once an ActiveSync connection is established, Remote CorporateSync automatically begins. Remote CorporateSync can be executed by going to Start > Programs > Communications > CorporateSync on your device (the user is told if Remote CorporateSync has started and no connection exists).
6. To begin synchronizing, click the "Synchronize Now" button in the Remote CorporateSync dialog box. Once Remote Synchronization displays a "Connected" status message, synchronization has been completed.
7. To cancel synchronization at any time, click the "Cancel" button in the Remote CorporateSync dialog box.
8. Close Remote CorporateSync and ActiveSync.
9. Disconnect from the network if desired.

## Setting your identity

The Sign In tab on your hand-held lets you enter your User Name, Server, Node (optional) and Password (optional). Passwords are case sensitive.

The Set Password dialog box lets you modify your password:

1. Enter your current password in the Old Password edit box.
2. Enter the new password in the Password edit box.
3. Enter the new password in the Confirm edit box to confirm the change.
4. Select the Save Password checkbox to save your new password.
5. Click OK when finished.

## The synchronization range

The Sync Range tab on your hand-held lets you enter the time range of Entries that will be synchronized. Enter From and To values to define the range. Narrow the time range if you find it is taking too long to synchronize.

## Synchronizing Events

The Events tab on your hand-held lets you select your Event options. To synchronize Events, select the Synchronize Events checkbox.

- Select "Synchronize Refused Events" to transfer Entries you have refused.
- Select "Show Attendees" to list people and resources invited to Events.
- Select "Limit Event Details" to enter the maximum size of Details to be transferred.

## Synchronizing Tasks

The Tasks tab on the hand-held lets you select your Task options. To synchronize Tasks, select the Synchronize Tasks checkbox.

- Select "Keep Completed Tasks" to transfer Tasks marked as completed.
- Select "Limit Task Details" to enter a maximum size of Details to be transferred.

## Synchronizing Contacts

The Contacts tab on the hand-held lets you select which Address Book to synchronize.

- Select "Synchronize contacts with" and enter the Address Book name.
- Select "Limit Contact Details" to enter the maximum size of Details to be transferred.

## Conflict Resolution

The Conflict Resolution tab of the CorporateSync Properties for Pocket PC dialog box lets you enter your default conflict resolution settings. This decides how CorporateSync deals with Entries modified in your calendaring application and on the hand-held.

- Select the "Prompt me, and set the default action to:" option button to be notified of these Entries. Select the default action from the drop-down list box. Prompting only occurs when you are connected locally via a serial cable or USB connection. When connecting remotely, the default action is performed without prompting.
- Select the "Don't prompt me, and always:" option button to always use the conflict resolution option selected in the drop-down list box below.

Click OK when finished with both tabs in the dialog box.



# 3

## Troubleshooting

In this chapter, we explain how to work around problems users sometimes encounter while working with the hand-held. When bulleted lists appear, your problem can be fixed using one, some or all of the possible solutions.

### Connection Problems

#### **I cannot get my hand-held to connect.**

- Verify that your hand-held is properly connected to your PC.
- Make sure ActiveSync is running and the status of the device indicates the Pocket PC is “connected”. Check ActiveSync Help for additional information. Also, refer to step #11 of the Installation section of this User Guide.
- Make sure no other programs are using the same COM port as your hand-held when connecting using a serial port or USB connection.

#### **I cannot start synchronization.**

- Verify the user name, password, server and node settings in the CorporateSync for Pocket PC Settings dialog box on your hand-held.
- Make sure the calendar server you are connecting to is running properly.
- Make sure the user name or initials you entered distinguish you from everyone else on the system.
- Make sure the synchronizing settings are selected in the CorporateSync for Pocket PC Settings dialog box on your Pocket PC.
- If you are synchronizing Addresses, your off-line and on-line passwords must be the same.
- Your calendaring application must be completely closed if you want to synchronize contacts. Also, make sure the name of the Address Book is entered correctly in the CorporateSync for Pocket PC Settings dialog box on your hand-held.

### **It is taking too long to synchronize.**

Reduce the time it takes to synchronize by doing the following:

- Synchronize once using the largest possible time period and then synchronize using the smallest time period you wish to keep on your hand-held.
- Narrow the time period you want to synchronize using the Sync Range tab of the CorporateSync for Pocket PC Settings dialog box.
- Do not synchronize completed Tasks or refused Entries.

Note: CorporateSync removes previously synchronized Entries from your handheld device that fall outside the current synchronization range.

## **Entry Problems**

### **Some hand-held Entries do not appear in my calendaring application after synchronizing.**

- Choose View menu > Refresh All in your calendaring application.
- Only the first Entry of a repeating Entry created on the hand-held appears on the calendar server.
- These Entries are outside the range defined on the Sync Range tab of the CorporateSync for Pocket PC Settings dialog box on your hand-held.

### **Some Entries do not appear on the hand-held after synchronizing.**

- These Entries are outside the range defined on the Sync Range tab of the CorporateSync for Pocket PC Settings dialog box on your hand-held.
- Check the synchronization settings on the Events, Tasks and Contacts tabs of the CorporateSync for Pocket PC Settings dialog box. Select the desired options and synchronize again.

### **I keep getting multiple copies of my Entries.**

- If you modified an Entry in both the hand-held and your calendaring application, Entries are duplicated when you synchronize and the calendaring application Events setting is "Keep both". Simply delete the unwanted Entry (either on your hand-held or in your calendaring application) and synchronize again.

- If the synchronization stops with an unexpected error, power loss, etc., it is possible that the next time you synchronize some Entries will be duplicated.

### **Changes I made to an Entry on my hand-held were not transferred to my calendaring application.**

- If it was a repeating Entry from a series of repeating Entries, your calendaring application will never acknowledge it. The calendaring application only modifies the original Entry.
- The CorporateSync setting is “Your calendar server overwrites Pocket PC Entries” or “Do Nothing”.
- Make sure the Entry occurs within the Sync Range.

### **When I use my hand-held to modify a repeating Entry created on the calendar server, some of the changes are applied to all instances of the Entry, while others only to the instance I modified.**

The Title, Location, Times and Reminder only change in the instance you modify. Deleting an Event on the hand-held will also only delete that one instance. To change these settings for all instances at once, you must use your calendaring application. Notes and Access Levels will be modified for all instances of the Entry.

### **I am having trouble with repeating Events created on my hand-held.**

The hand-held and your calendaring application handle repeating Entries differently. Currently, the only way to have repeating Events appear in both your calendaring application and the hand-held is to schedule them in your calendaring application and synchronize. If you need to schedule repeating Events using your hand-held, you have to create each Event separately for them to appear in your calendaring application.

- If you created repeating Events in the hand-held and the setting for CorporateSync is “Synchronize the files”, only the first one appears in your calendaring application. All other instances remain on the hand-held.
- If you delete the lone instance that was transferred to your calendaring application and the setting for CorporateSync is anything other than “Do Nothing”, all instances of that Entry on the hand-held are deleted.

### **I want to delete all Entries on my hand-held.**

- Delete them manually on an Entry-by-Entry basis.
- Set a sync range on your hand-held where no Entries exist and synchronize with your settings set to “Calendar server overwrites Pocket PC Entries”.
- Do a hard reset by removing the main and backup batteries from your hand-held.  
Note: This kills all data and programs on your hand-held. CorporateSync must be reinstalled if you choose this option.

### **There is an extra ‘x’ or ‘#’ beside some extension numbers on my hand-held.**

You probably entered the extra character in your Address Book. Open the Address Book and delete the extra character manually from the Extension edit box. The next time you synchronize the extra character will be gone.

## **Other Problems**

### **My hand-held keeps freezing up.**

Perform a soft reset by gently pressing the reset button with the tip of the Stylus. Refer to your hand-held documentation.

### **How do I delete CorporateSync from my hand-held?**

1. Choose Start menu > Settings > Remove Programs > Steltor CorporateSync Setup Applet.
2. Click Remove.

### **Why is “Synchronize Now” disabled?**

- Make sure your hand-held is properly connected to your PC.
- Make sure ActiveSync is running and the device status is “connected”.

Appendix

**A****Field Mapping**

This section describes conversions that occur when transferring data between your calendaring application and your hand-held's Calendar, Contacts and Tasks. Apart from special conversion rules applicable to specific fields, some general rules apply:

- Text fields are truncated to the maximum allowed length on the destination platform.
- Dates that are not within the representable range of dates on the destination platform will get changed to the nearest representable date.
- Details from your calendaring application are truncated to the "maximum note size" before being sent to a hand-held Note.
- If the user changes a field on the hand-held which he or she does not have the right to change in your calendaring application (e.g. changing the time of an Entry the user does not own), the change is rejected and the affected field is copied from your calendaring application back onto the hand-held.

Note: Fields not mentioned in the following sections are ignored by CorporateSync.

**Entries**

Converting a calendar server Entry into a hand-held Date Book item:

Calendar Application	hand-held	Notes
Title	Description	
Location	Location	

Calendar Application	hand-held	Notes
Detail	Note	If the calendar application Entry is a Meeting, then its detail is copied to the hand-held Event's note. If it is a Day Event or Daily Note, it is ignored. If there is more than one attendee or its sole attendee is not the login user, then a textual list of attendee names is created and added to the hand-held Event's note (if the Attendee List option is enabled). Any formatting (i.e. bold or italics) on the device is lost.
Start Time	Starts	The calendar application Event's start time is split into two parts: the date and the time-of-day on that date. The date is always placed into the hand-held Event's date field. If the calendar server Entry is a Meeting, then the time-of-day is placed into the hand-held Event's start time. If the calendar server Entry is anything besides a Meeting (e.g. Day Event, Daily Note, Holiday), the hand-held Event becomes a full-day Event.
Duration	Ends	If the calendar server Entry is a Meeting, then its duration is added to its start time's time-of-day, and the result placed in the hand-held Event's end time.
Reminder	Reminder	If the calendar server Entry does not have a Reminder, the hand-held Event does not get one either. The hand-held does not support "Display Upcoming" reminders. All calendar application reminders get translated into pop-up reminders.
Tentative	Show Time As...	If a calendar server Meeting is marked off as Tentative, the Show Time As on the hand-held is set to Tentative.
Access Level	Private flag	If the calendar server Access level is Personal, the hand-held Task's private flag is turned on. If the Access level is anything else, the hand-held Task's private flag is turned off.
	Repeat	Repeating Entries on the calendar server are always copied as individual instances, so this field is set to "This item occurs once".

Converting a Date Book item on the hand-held to the calendar server:

hand-held	Calendar Application	Notes
Description	Title	
Location	Location	
Note	Detail	The hand-held Event's note is split into two parts: an attendee part and a note part. If it is a Meeting, the attendee part is discarded and the rest is copied to the calendar application. Character formatting (i.e. bolding or italics) is not transferred.
Starts	Start Time	The hand-held Event's date (and its start time, if it is not a full-day Event) are merged and placed into the calendar server Entry's start time. Note that if the hand-held Event is changed from a timed Event into an untimed one or vice versa, that change is rejected and its original state is restored. (This is because it would amount to changing the class of a calendar server Entry, which we do not support.)
Ends	Duration	If the calendar server Entry is a Meeting, then the hand-held Event's date, start time and end time are combined to calculate its duration, which is then placed in the calendar application Event's duration field. The calendar application allows a Meeting to last up to 24 hours. If it is greater than 24 hours, it will be truncated in the calendar application.
Reminder	Reminder	If the hand-held Event does not have a reminder, the calendar server Entry does not get one either.
Show Time As	Tentative	If Show Time As is Tentative and it is a Normal Event, then the calendar server Meeting is marked as Tentative.
Private flag	Access level	If the hand-held Event's private flag is turned on, then the calendar server Entry's Access level becomes Personal. If the hand-held Event's private flag is turned off, the calendar application Event's Access level comes from the user's Entry defaults, unless the default Access level is Personal (the calendar application Access level is set to Confidential in this case). Note: If the hand-held Event's private flag is turned off and the flag has not changed since the last synchronization, the calendar server Access level remains unchanged unless it is a Private Entry.

hand-held	Calendar Application	Notes
Repeat		Calendar server Repeating Entries are ignored on the hand-held. They are treated as if they are single-instance Events.

## Tasks

Converting a calendar server Task into a To Do item on the hand-held:

Calendar Application	hand-held	Notes
Description	Description	
Detail	Note	Any formatting (i.e. bolding or italics) on the device is lost.
Start Date	Starts	The hand-held has a problem when a Starts value or an Ends value is assigned and not the other. The times are displayed correctly, but if it is later edited both values are changed to none.
Due Date	Ends	See previous Note.
Priority	Priority	If the calendar server priority is between 1 and 3, it maps to High. From 4 to 7, it maps to Normal. From 8 to 9 or any letter, it maps to low.
Completion level	Completed flag	A calendar server completion level of 100% level flag maps to the hand-held's completed flag being turned on. Any other completion level, the completed flag is turned off.
Access level	Private flag	If the calendar server Access level is Personal, the hand-held Task's private flag is turned on. If the Access level is anything else, the hand-held Task's private flag is turned off.
Reminder	Reminder	A reminder for either the Starts or Ends value, not both, is mapped. If one is set, the hand-held will assign it the Reminder automatically. If both are set, the one that is set to go off first is set.

## Converting a To Do item on the hand-held into a calendar application Task:

hand-held	Calendar Application	Notes
Description	Description	
Note	Detail	Character formatting (e.g. bolding or italics) is not transferred.
Starts	Start Date	Your hand-held can only create a Task with either both a start and end time or neither. These are synchronized properly into the calendar server.
Ends	Due Date	See previous Note.
Priority	Priority	If the hand-held priority is High, it maps to 1. Normal maps to 4. Low maps to 8.
Completed flag	Completion level	The hand-held completed flag maps to a calendar server completion level of 0% or 100%, depending on the state of the flag. There is an exception to this rule, however. If the hand-held completed flag is off, and it has not changed since the last sync, and the calendar server completion level is between 1% and 99%, the calendar server completion level stays unchanged.
Completion Date	Completion Date	The hand-held enters a completion date automatically when a Task's Completion Flag is selected. This is synchronized properly on the calendar server.
Reminder	Reminder	The hand-held reminder is synchronized leaving the other reminder as is.
Private flag	Access level	If the hand-held Task's private flag is turned on, then the calendar server Task's Access level becomes Personal. If the hand-held Task's private flag is turned off, the calendar server Task's Access level comes from the user's Task defaults, unless the default Access level is Personal (the calendar application Access level is set to Confidential in this case). There is an exception to this rule: If the hand-held Task's private flag is turned off, and the flag has not changed since the last sync, and the calendar server Access level is anything except Personal, the calendar server Access level remains unchanged.

## Address Book Entries

Converting a calendar application Address Book Entry into a hand-held address (or vice versa):

Calendar Application	hand-held
Last name	Last name
First name	First name
Assistant phone	Assistant Tel
Business 1	Work Tel
Business 2	Work2 Tel
Fax 1	Work Fax
Fax 2	Home Fax
Home 1	Home Tel
Home 2	Home2 Tel
Mobile 1	Mobile Tel
Mobile 2	Car Tel
Pager	Pager
E-mail 1	E-mail1
E-mail 2	E-mail2
Business Street	Business Address
Business City	Business City
Business Prov/State	Business State
Business Zip/Code	Business Zip/Postal
Business Country	Business Country
Personal Street	Personal Address
Personal City	Personal City
Personal Prov/State	Personal State
Personal Zip/Code	Personal Zip/Postal
Personal Country	Personal Country

Calendar Application	hand-held
Title	Title
Company	Company
Department	Department
Office	Office Location
Assistant	Assistant
Birthday	Birthday
Anniversary	Anniversary
Spouse	Spouse

### Address Book Numbers

CorporateSync tries to recognize the numbers as best as it can. If it cannot find a valid international phone number combination, it enters everything in the phone number field in your calendar application. A blank space, dash or period can separate parts of the number. An 'x' or '#' can be used to identify extensions. The following are examples of valid phone number combinations:

555-5555	555 5555	(555) 555-5555
55 (555) 555-5555	555-5555 #555	55.55.55.55
55-55-55	555-55-55	55 55 55 55 x555
55 (555) 555-555 #555		

