



INFOTRIEVER

User Guide

Personalization

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Infotriever User Guide – Personalization

Overview

There is no requirement to personalize your Infotriever desktop software. However, certain features that are unlocked when you personalize include:

- ExecAssist™ - enables you to download events and contacts into the organizer of a work colleague or friend who has provided you permission through the Infotriever service (or vice versa);
- LiveContact™ - Infotriever-enables your contact information so that other may easily save it into their address books, and be updated automatically when you update your information;
- The ability to re-connect to your previously downloaded Infotriever events and contacts, such as when you re-download Infotriever after changing computers.

Requirements

In order to personalize Infotriever, you will need:

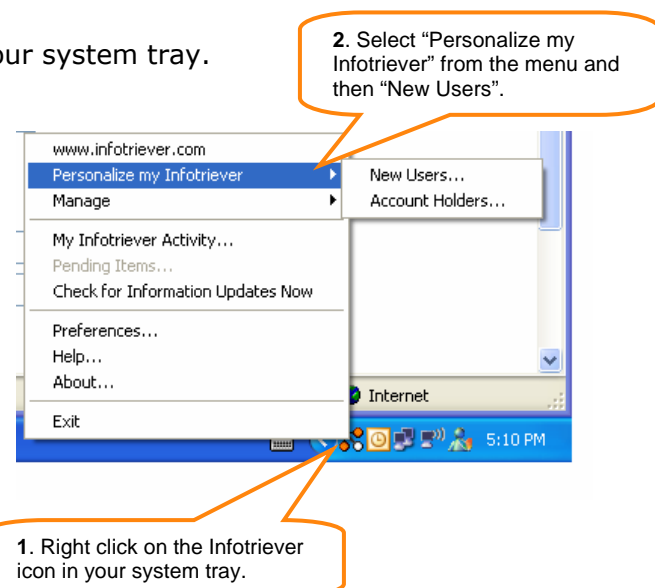
- A live internet connection.
- The Infotriever software downloaded and installed on your computer (note: if you do not have the Infotriever software downloaded and installed on your computer, please refer to Infotriever User Guide - Download and Installation).

Initiating Personalization from the Desktop

If you are an existing Infotriever user, you can initiate the personalization process from your Infotriever desktop software as follows:

1. Right click on the Infotriever icon in your system tray.
2. Select Personalize my Infotriever > New Users.
3. Proceed to the Personalization section below.

Note: If you don't see the "Personalize my Infotriever" in the pop-up menu, then you have already personalized your account.



Personalization

Please follow these steps to personalize your Infotriever software:

1. Personalize Your Infotriever – Step 1 of 2.

Enter your email address, name and password, and then click on the Create your Infotriever Account orange "GO" button at the bottom of the page.

1. Enter requested information.

2. Click on "GO" to continue with the personalization process.

2. Personalize Your Infotriever – Step 2 of 2.

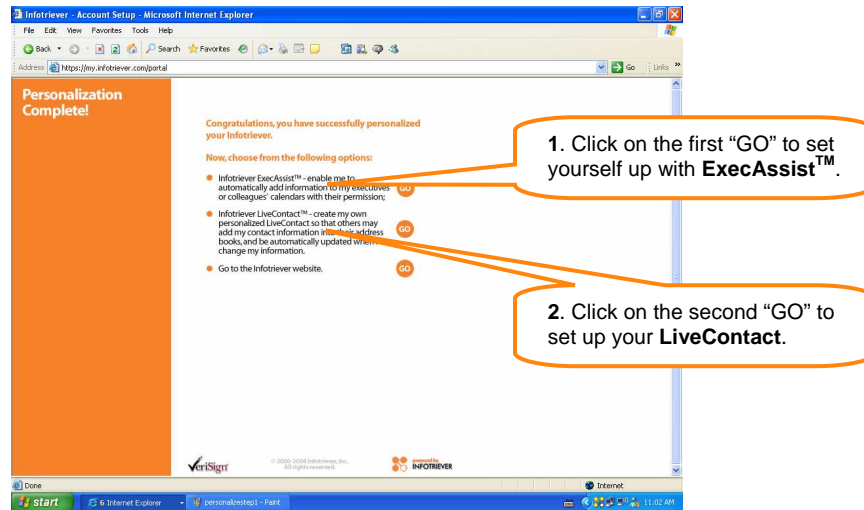
Select your preferences, and click on the Finish orange "GO" button to complete your personalization.

1. Set your preferences.

2. Click on "GO" to complete your personalization.

3. Personalization Completed.

Once your Infotriever personalization has been completed, select the enhanced Infotriever features you wish to set up, such as **ExecAssist™** or **LiveContact™**.



Note: If you select ExecAssist, you will be directed to the ExecAssist set up pages, described in detail in the ExecAssist instructions.