

# ***GOLDMINE***<sup>®</sup> **4.0**

***Turn Your Contacts Into Gold!***<sup>®</sup>

*Synchronizing GoldMine  
with Outlook, Pilot, and Windows CE*

July 1999

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## Synchronizing GoldMine with Outlook, Pilot, or Windows CE

This document describes how to set up *GoldMine* to synchronize with Microsoft Outlook, Palm Pilot, or Windows CE. For details about the synchronization process and/or *GoldMine*'s method of synchronizing data, see "Synchronizing Data between the Field and the Office" in the *GoldMine Reference Manual*.

Using *GoldMine* 4.0, you can synchronize updated information with any of the following applications or devices:

- Microsoft Outlook 98 or Outlook 2000\*. *GoldMine 4.0 does not synchronize with Outlook 97.*
- Palm Pilot.
- Hand-held PC (HPC) or Personal Digital Assistant (PDA) running Windows CE version 2.x.

You can *either* synchronize bidirectionally between *GoldMine* and these applications/devices, *or* transfer data in one direction only.



*If you use both Outlook and Windows CE, do not synchronize each application separately with GoldMine. Separate synchronization may result in duplicate data.*

Instead, first synchronize Windows CE with Outlook, *then* synchronize Outlook with *GoldMine*. For details about synchronizing Windows CE with Outlook, see your Windows CE documentation.

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### Synchronizing Data Updates

*GoldMine*'s wizards make setting up and running synchronization fast and easy. This section refers to synchronizing *GoldMine* with Outlook. However, the settings are almost exactly the same for Outlook, Pilot, or a Windows CE device. Where differences occur (to define advanced settings), separate sections provide specific information for Outlook, Pilot, and Windows CE.

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\* Outlook 98/2000 must be installed on the workstation from which you synchronize.

To synchronize *GoldMine* with:

- **Pilot**—from the Main Menu, select **File|Synchronization|Sync with your Pilot**. The **GoldMine Pilot Synchronization Wizard** appears. Follow the sequence for synchronizing with Microsoft Outlook except as noted.
- **Windows CE device**—from the Main Menu, select **File|Synchronization|Sync with your Windows CE device**. The **GoldMine WinCE device Synchronization Wizard** appears. Follow the sequence for synchronizing with Microsoft Outlook except as noted \*.
- **Microsoft Outlook**—from the Main Menu, select **File|Synchronization|Sync with Outlook**. The **GoldMine Outlook Synchronization Wizard** appears.

**GoldMine  
Outlook  
Synchronization  
Wizard**



The **GoldMine Outlook Synchronization Wizard** contains the following options:

**Start a new session** Allows you to define settings for a synchronization session that you can save for future use, or use just once.

**Sync using the settings of the following Profile** Uses the settings already defined in a profile selected from the drop-down list for the current synchronization.

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\* Notes do not synchronize *from* Windows CE to *GoldMine*.

If you select **Sync using the settings of the following Profile**, you can select **Finish** to start synchronizing according to existing settings. The **GoldMine Process Monitor** appears. Go to “Monitoring Synchronization” on page 28.

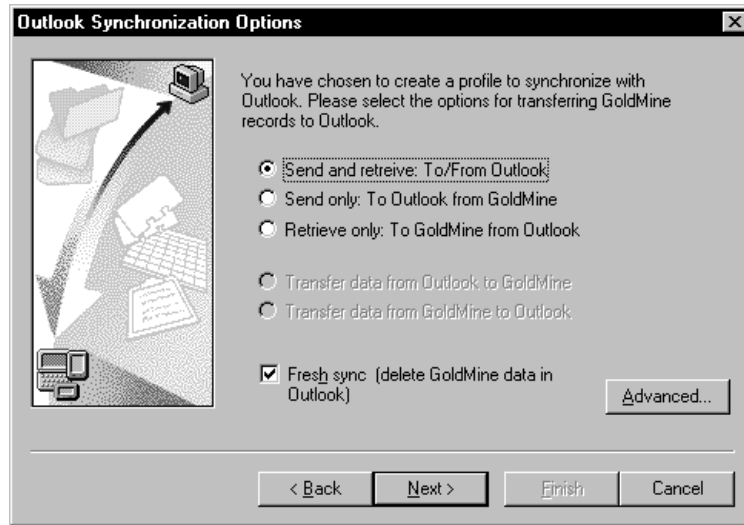
However, to check or change any existing settings, you can continue through the wizard.

To **Start a new session**, or to change existing settings for a profile, select **Next>**. The **Outlook Synchronization Options** dialog box appears. Continue with “Defining Synchronization Options.”

### Defining Synchronization Options

When you select **Next>** from the first wizard screen, the **Outlook Synchronization Options** dialog box appears.

**Outlook Synchronization Options dialog box**



The **Outlook Synchronization Options** dialog box contains the following options:

**Send and retrieve: To/From Outlook** Sends and retrieves data between *GoldMine* and Outlook.

**Send Only: To Outlook from GoldMine** Sends data from *GoldMine* to Outlook, but does not retrieve data from Outlook to *GoldMine*.

**Retrieve only: To GoldMine from Outlook** Retrieves data from Outlook to *GoldMine*, but does not send data from *GoldMine* to Outlook.

**Fresh sync (delete GoldMine data in Outlook)** Deletes all contacts and activities synchronized *from GoldMine* to Outlook. You can select this option any time you want to replace data in Outlook.  
To prevent *GoldMine* from overwriting data on the target system, uncheck this option. However, be sure to manually delete any records from Outlook that you do *not* want to duplicate.

**Advanced** Displays the **Advanced Options** window, from which you can define a variety of options for synchronizing with Outlook, Pilot, or Windows CE. For details:

- **Outlook**—see “Setting Advanced Options for Outlook Synchronization” in the following section.
- **Pilot**—see “Setting Advanced Options for Pilot Synchronization” on page 13.
- **Windows CE**—see “Setting Advanced Options for Windows CE Synchronization” on page 20.

When done, select **Next>**.

If you selected *either* **Send and retrieve: To/From Outlook** or **Send only: To Outlook from GoldMine**, the **Record Selections** dialog box appears. Go to “Selecting Contact Records to Send” on page 23.

If you selected **Retrieve only: To GoldMine from Outlook**, the **Ready to Synchronize** dialog box appears. Go to “Saving Settings in a Profile” on page 27.

## Setting Advanced Options for Outlook Synchronization

When you select **Advanced** from the **Outlook Synchronization Options** dialog box, the **Advanced Options** window appears. When you first access the **Advanced Options** window, *GoldMine* displays the **General** tab by default.

*Advanced Options window for Outlook synchronization*

The screenshot shows the 'Advanced Options' dialog box with the 'General' tab selected. The dialog has a title bar with a close button and a tabbed interface with 'General', 'Field Mapping', 'Contacts', 'Calendar', and 'Task' tabs. The 'General' tab contains the following settings:

- Calendar Date Range:** A section with a title and a paragraph: "Please select the starting and ending date ranges that will determine which new Outlook appointments will be retrieved during a synchronization session." Below this are two rows of controls: "Starting" with a spinner set to '1', a 'Day' dropdown, and the text "before today"; and "Ending" with a spinner set to '1', a 'Month' dropdown, and the text "after today".
- Phone extension separator:** A text input field containing a period '.'.
- Maximum characters in contact notes:** A text input field containing '2048'.
- Checkboxes:** Four unchecked checkboxes: "Sync deletions from Outlook to GoldMine", "Sync deletions from GoldMine to Outlook", "Retrieve all data from Outlook regardless of last sync date.", and "Synchronize RSVP".

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

You can select any of the following tabs to define synchronization settings:

- **General:** defines the range of dates from which activities are selected for synchronization, deletions to be synchronized, and other settings, such as the character to use for designating telephone extensions and the maximum number of characters to include for notes from contact records—see “Defining General Advanced Options” below.
- **Field Mapping:** defines field “matches” so that *GoldMine* can place data in the corresponding target Outlook fields—see “Mapping Fields” on page 9.
- **Contacts:** specifies the location of the Outlook folder in which *GoldMine* can send and/or retrieve contact information—see “Defining Contact/Calendar/Task Folders in Outlook” on page 11.
- **Calendar:** defines the Outlook folder in which *GoldMine* can send and/or retrieve activity information—see “Defining Contact/Calendar/Task Folders in Outlook” on page 11.
- **Task:** defines the Outlook folder in which *GoldMine* can send and/or retrieve to-do activity information (timeless activities ordered by priority)—see “Defining Contact/Calendar/Task Folders in Outlook” on page 11.


### **Defining General Advanced Options**

You can define a variety of settings from the **General** tab of the **Advanced Options** window, as shown in the figure on page 5.

The options are nearly identical for setting up *GoldMine* synchronization with Outlook, Pilot, and Windows CE. The following section refers to Outlook (except as noted), but you can use the same information to define **General** tab settings for Pilot or Windows CE.

The **General** tab contains the following settings:

**Starting** Number of days, months, or years *before* the current date for which *GoldMine* will retrieve calendar activities from Outlook.

In the first field, *either* type a number (1–31) *or* click  to scroll through numbers. Select a calendar period (**Day**, **Month**, or **Year**) from the drop-down list.

**Ending** Number of days, months, or years *after* the current date for which *GoldMine* will retrieve calendar activities from Outlook.

You can set the **Ending** date as described above for **Starting** date.



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**Calendar date range** settings affect only data retrieved from Outlook, not activity data sent *from GoldMine*.

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**Phone extension separator**

Specifies the character used to separate a telephone number from a telephone extension number. The default is a comma ( , ).

**Maximum characters in contact notes**

Limit for the amount of *GoldMine's Notes* to send to Outlook for a single contact. By default, *GoldMine* sends 2,048 bytes, or characters.  
*This option is not available for Windows CE.*



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For details on entering information in *GoldMine's Notes* tab, see “Entering Notes” in the *GoldMine User's Guide*.

---

**Sync deletions from Outlook to GoldMine**

When *GoldMine* processes the updates, contact records and activities deleted in Outlook are also deleted in *GoldMine*.

**Sync deletions from GoldMine to Outlook**

When Outlook processes the updates, contact records and activities deleted in *GoldMine* are also deleted in Outlook.

**Retrieve all data from Outlook regardless of last sync date**

*GoldMine* retrieves *all* data synchronized from Outlook, regardless of the date that the change(s) were made. Selecting this option affects *only* data retrieved *from* Outlook without affecting the range of data that *GoldMine* sends to Outlook.

**Synchronize RSVP**

*Outlook setup only*: Selects *GoldMine's* RSVP option for all activities synchronized *from* Outlook to *GoldMine*.

Most users do not need to select this option.

**Show HotSync dialog** *Pilot setup only:* Displays the **GoldMine HotSync** dialog box, from which you can start the *GoldMine*-Pilot synchronization, or access the **Custom** dialog box to change current sync settings.

Uncheck this option if you do not want the **GoldMine HotSync** dialog box to appear before *GoldMine* starts synchronizing with your Pilot.

For details on working with settings in the **GoldMine HotSync** dialog box, see “Checking HotSync Settings before Synchronizing with Pilot” on page 28.

For details on working with settings in the **Custom** dialog box, see your Pilot documentation.

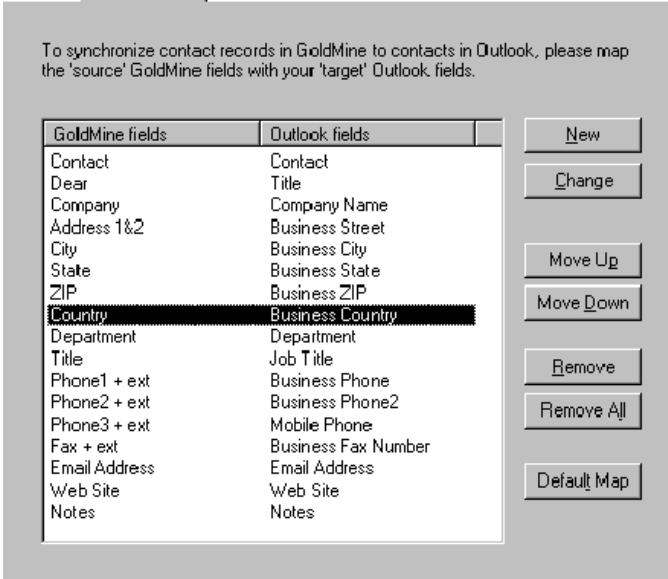
When done, you can *either* select another tab to continue defining advanced settings, *or* you can select **OK** to return to the **Outlook Synchronization Options** dialog box.

## Mapping Fields

*GoldMine* contains a set of field mappings between *GoldMine* and Outlook to enable synchronization between the applications. However, you can change the default field mappings and map previously unmapped fields.

You can add or change field mappings from *GoldMine* to Outlook, Pilot, or a Windows CE device from the **Field Mapping** tab of the **Advanced Options** window. The following section refers to Outlook, but you can use the same information to map *GoldMine* fields to either Pilot or Windows CE.

### Field Mapping tab



To synchronize contact records in GoldMine to contacts in Outlook, please map the 'source' GoldMine fields with your 'target' Outlook fields.

GoldMine fields	Outlook fields
Contact	Contact
Dear	Title
Company	Company Name
Address 1&2	Business Street
City	Business City
State	Business State
ZIP	Business ZIP
Country	Business Country
Department	Department
Title	Job Title
Phone1 + ext	Business Phone
Phone2 + ext	Business Phone2
Phone3 + ext	Mobile Phone
Fax + ext	Business Fax Number
Email Address	Email Address
Web Site	Web Site
Notes	Notes

New  
Change  
Move Up  
Move Down  
Remove  
Remove All  
Default Map

The **Field Mapping** tab of the **Advanced Options** window contains the following settings:

- GoldMine fields** Displays the *GoldMine* fields currently selected as matches for the Outlook fields listed to the right.
- Outlook fields** Displays the Outlook fields currently selected as matches for the *GoldMine* fields listed to the left.



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Mapping another field to an existing Outlook field will delete the field's contents upon sending data *from GoldMine* to Outlook. To ensure that data is not accidentally deleted, map the field, then synchronize *from* Outlook to GoldMine. After you check that *GoldMine* has received the data, you can send data *from GoldMine* to Outlook.

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The **Field Mapping** tab contains the following buttons:

**New** Displays the **Map GoldMine fields to Outlook fields** dialog box, from which you can map together fields that are currently unmapped.



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#### *Pilot synchronization*

You can override the default address category by mapping the Pilot category field to a *GoldMine* field. *GoldMine* synchronizes new and existing records on your Pilot to the categories in the *GoldMine* field. If the category does not exist on your Pilot, *GoldMine* will create the category. *GoldMine* can create up to 14 categories on your Pilot.

Once you map a Pilot category field to a *GoldMine* field, you cannot select the default address category for any Pilot category field. For details about Pilot's default address categories, see "Selecting Address and To-do Categories to Synchronize" on page 17.

---

**Change** Displays the **Re-map GoldMine fields to Outlook fields** dialog box, from which you can change one of the mapped fields in an existing mapped pair.

**Move Up** Moves the selected field mapping one line higher in the list.

**Move Down** Moves the selected field mapping one line lower in the list.

**Remove** Deletes the field mapping entry from the list.

**Remove All** Deletes all field mapping entries from the list except the **Contact** mapping.

**Default Map** Restores the original settings to the **Field Mapping** list.

When done, you can *either* select another tab to continue defining advanced settings, *or* you can select **OK** to return to the **Outlook Synchronization Options** dialog box.

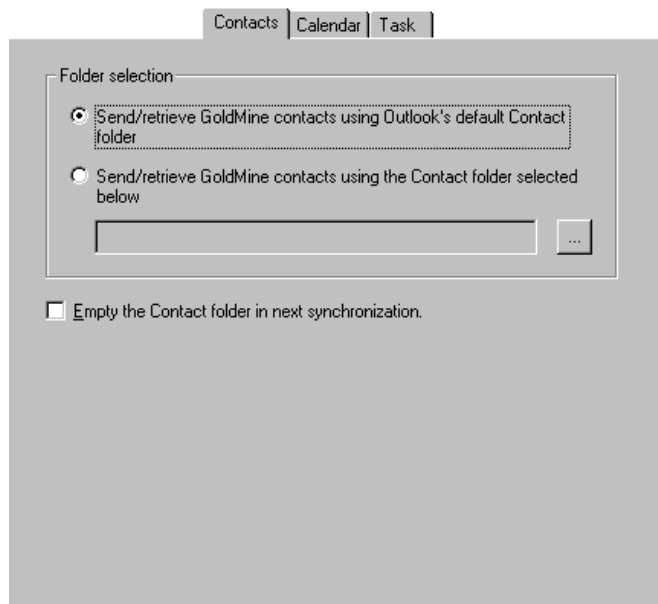
### **Defining Contact, Calendar, and Task Folders in Outlook**

You can specify the Outlook folder for *GoldMine* to use when synchronizing specific types of information by selecting the corresponding tab as follows:


- **Contacts tab:** specifies the folder for *GoldMine* to use when synchronizing contact information with Outlook.
- **Calendar tab:** specifies the folder for *GoldMine* to use when synchronizing scheduled activity information with Outlook.
- **Task tab:** specifies the folder for *GoldMine* to use when synchronizing to-do activities with Outlook.

The following figure show the **Contacts** tab.

**Contacts,  
Calendar, and  
Tasks tabs)**



The **Contacts/Calendar/Task** tabs of the **Advanced Options** window contain the following settings:

- Folder selection** To specify the folder for *GoldMine* to use when synchronizing contact information with Outlook, select one of the following options:
- **Send/retrieve GoldMine contacts using Outlook's default Contact/Calendar/Task folder:** accepts the default selection of Outlook's **Contact** folder for synchronization
- or*
- **Send/retrieve GoldMine contacts using the Contact/Calendar/Task folder selected below:** click  to display the **Select Outlook folder** dialog box, from which you can select a folder. You must select a valid folder to activate the **OK** button.

**Empty the Contact/Calendar/Task folder in next synchronization** Deletes all records of the specified type *before* the next synchronization. *Back up data before selecting this option. The deletion cannot be undone.*

When done, you can *either* select another tab to continue defining advanced settings, *or* you can select **OK** to return to the **Outlook Synchronization Options** dialog box.

## Setting Advanced Options for Pilot Synchronization

When you select **Advanced** from the **Pilot Synchronization Options** dialog box, the **Advanced Options** window appears.


*Advanced  
Options  
window for Pilot  
synchronization*

The screenshot shows the 'Advanced Options' dialog box with the following settings:

- Default Address Category:** Business
- Default Address Phone Labels:**
  - Phone 1: Work
  - Phone 2: Home
  - Phone 3: Fax
  - Phone 4: Other
  - Phone 5: Email
- Default To-do Category:** Business

Buttons: OK, Cancel

You can select any of the following tabs to define synchronization settings:

- **General:** defines the range of dates from which activities are selected for synchronization, deletions to be synchronized, and other settings, such as the character to use for designating telephone extensions and the maximum number of characters to include for notes from contact records. Defining these settings is almost the same for *GoldMine*-Pilot synchronization as defining settings for *GoldMine*-Outlook synchronization—see “Defining General Advanced Options” on page 6, and “Checking HotSync Settings before Synchronizing with Pilot” on page 28.
- **Field Mapping:** defines “matches” between fields so that *GoldMine* can place data in the corresponding target Pilot fields. Mapping fields between *GoldMine* and Pilot is the same as mapping fields between *GoldMine* and Outlook—see “Mapping Fields” on page 9.
- **Conduit:** installs the *GoldMine*-Pilot conduit, which specifies the Pilot record categories to update. You must install the *GoldMine*-Pilot conduit before you can synchronize—see “Installing the *GoldMine*-Pilot Conduit” on page 14.
- **Purge:** specifies Pilot data types to delete, such as Pilot’s Address book or To-do list, before or during synchronization—see “Selecting Data Categories to Purge” on page 16.
- **Address Categories:** specifies the categories of new Pilot address information for *GoldMine* to retrieve—see “Selecting Address and To-do Categories to Synchronize” on page 17.
- **To-do Categories:** specifies the categories of new Pilot to-do information for *GoldMine* to retrieve—see “Selecting Address and To-do Categories to Synchronize” on page 17.
- **Defaults** (click  to see): specifies default settings for synchronizing Pilot’s Address and To-do categories—see “Changing Default Categories” on page 19.

### ***Installing the GoldMine-Pilot Conduit***

A **conduit** specifies the Pilot record categories to update—such as the Address book—when Pilot synchronizes with another application. You set up the conduit in Palm Desktop.

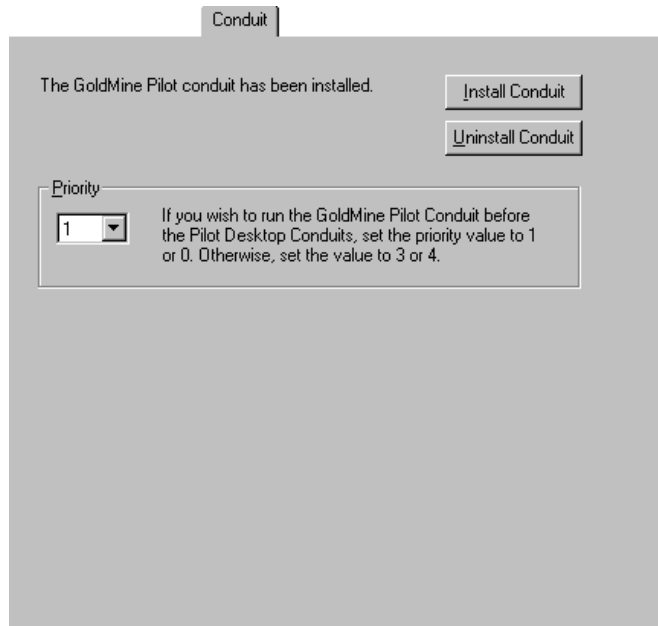
Once you install the Palm Desktop software on your system and check the default conduit, you can synchronize *GoldMine* with your Pilot. *GoldMine* installs the necessary conduit automatically. During your first synchronization, *GoldMine* prompts you:

**GoldMine has not detected an installed GoldMine Pilot conduit. Do you wish to install conduit?**

To install the conduit, then synchronize, select **Y**es.

You can set the synchronization priority and uninstall the conduit for *GoldMine-Pilot* synchronization from the **Conduit** tab of the **Advanced Options** window.

### Conduit tab



The **Conduit** tab contains the following settings:

#### **Install Conduit**

Once you click this button, *GoldMine* automatically activates the settings to define the Pilot record categories to synchronize. If you are running an older version of the conduit, the label appears as **Update Conduit**.

#### **Uninstall Conduit**

Removes the conduit for *GoldMine-Pilot* synchronization.

Once you click this button, *GoldMine* removes the conduit. If you try to synchronize after removing the conduit, *GoldMine* will display a prompt (described on the previous page) asking if you would like to install the conduit.

#### **Priority**

Sets the order of synchronization between the *GoldMine-Pilot* conduit and the Palm Desktop conduit. To run the *GoldMine-Pilot* conduit *before* the Palm Desktop conduit, select either 0 or 1. To run the Palm Desktop conduit *before* the *GoldMine-Pilot* conduit, select 3 or 4.

To access this option, you must have installed the *GoldMine-Pilot* conduit. If the conduit is not installed, the **Priority** drop-down list is dimmed.

When done, you can *either* select another tab to continue defining advanced settings, *or* you can select **OK** to return to the **Pilot Synchronization Options** dialog box.

### **Selecting Data Categories to Purge**

You can specify the Pilot data types to be deleted *either* before the next synchronization with *GoldMine*, *or* before *every* synchronization session.



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Purging records from Pilot does *not* affect data in *GoldMine*.

---

You can select the what data you want to purge and the conditions for purging from the **Purge** tab of the **Advanced Options** window.

#### **Purge tab**

The screenshot shows the 'Purge' tab of the 'Advanced Options' window. It is divided into three sections, each with a title and a list of checkboxes:

- Address book**
  - Always delete the Pilot Address book before synchronizing.
  - Delete the Pilot Address book in next synchronization.
  - Only delete Address items in selected Categories.
- Date book**
  - Always delete the Pilot Date book before synchronizing.
  - Delete the Pilot Address Date in next synchronization.
- To-Do list**
  - Always delete the Pilot To-do list before synchronizing.
  - Delete the Pilot To-do list in next synchronization.
  - Only delete To-Do items in selected Categories.

The **Purge** tab contains the same settings for each of three data categories:

- **Address book**
- **Date book**
- **To-Do list**

For each of these categories, you can select one or more of the following options:



---

If you select a purge option, be sure to back up data before synchronizing. Once performed, purging cannot be undone. *You do not need to purge data to synchronize updates to/from GoldMine and Pilot.*

---

**Always delete the Pilot Address book/Date book/To-do list before synchronizing**

Deletes all records of the specified type(s) *before* every synchronization with *GoldMine*.

This option might be useful for users who want to use Pilot to take contact information with them, but want to maintain contact information *only* in *GoldMine*.

**Delete the Pilot Address book/Date book/To-do list in next synchronization**

Marks all records of the specified type(s) for deletion before the next synchronization with *GoldMine*.

This option might be useful for a user who receive a Pilot from a previous user, or who haven't synchronized with *GoldMine* for some time, and want to "start fresh."

**Only delete Pilot Address book/To-do list in selected Categories**

Deletes only records of the categories selected in the **Address Categories** and **To-do Categories** tabs.

This option is not available for Pilot's **Date book**.

When done, you can *either* select another tab to continue defining advanced settings, *or* you can select **OK** to return to the **Pilot Synchronization Options** dialog box.

### **Selecting Address and To-do Categories to Synchronize**

You can specify the data categories under which Pilot will file *GoldMine* contacts and to-dos from the **Address Categories** and **To-do Categories** tabs of the **Advanced Options** window. Your selections do *not* affect which data types are synchronized to or from your Pilot. For example, if the default address category is Business, Pilot will file all contacts synchronizing from *GoldMine* under the Business category. If you change the address category for a selected contact from your Pilot, *GoldMine* will respect the new category selection. For more details about categories, see your Pilot documentation.

Your selections from the **Address Categories** and **To-do Categories** tabs does *not* affect data selection for synchronizing to or from your Pilot.



---

You can override the default address category by mapping the Pilot category field to a *GoldMine* field. *GoldMine* synchronizes new and existing records on your Pilot to the categories in the *GoldMine* field. If the category does not exist on your Pilot, *GoldMine* will create the category. *GoldMine* can create up to 14 categories on your Pilot. For details about mapping fields, see “Mapping Fields” on page 9.

Once you map a Pilot category field to a *GoldMine* field, you cannot select the default address category for any Pilot category field.

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The following figure shows the **Address Categories** tab, which contains the same options as the **To-do Categories** tab.

**Address  
Categories tab**

Address Categories | To-do Categories

Synchronize new Pilot items from all categories

Synchronize new Pilot items from selected categories

Categories

Unfiled

Business

Personal

The **Address Categories** tab and the **To-do Categories** tab contain the same settings to select data types for synchronization:

**Synchronize  
new Pilot  
items from  
all categories**

Sends new Pilot data from all available categories to *GoldMine*.

**Categories** Sends new Pilot data to *GoldMine* from the **Unfiled**, **Business**, and/or **Personal** categories. To select a category, check the corresponding box.

When done, you can *either* select another tab to continue defining advanced settings, *or* you can select **OK** to return to the **Pilot Synchronization Options** dialog box.

### **Changing Default Categories**

Using Pilot, you can store address, to-do, and activity information in multiple categories. You can specify the default Pilot categories that you want to synchronize with *GoldMine* from the **Defaults** tab of the **Advanced Options** window. For details about categories, see your Pilot documentation.

#### **Defaults tab**

The screenshot shows the 'Defaults' tab of a settings window. It features three main sections:

- Default Address category:** A dropdown menu currently showing 'Business'.
- Default Address phone labels:** Five rows, each with a label (Phone 1 to Phone 5) and a dropdown menu. The values are: Phone 1: Work, Phone 2: Home, Phone 3: Fax, Phone 4: Other, Phone 5: Email.
- Default I\_oD\_o category:** A dropdown menu showing 'Business' and a list box below it containing 'Unfiled', 'Business', and 'Personal'.

The **Defaults** tab contains the following options:

**Default Address category** Specifies the default address category to synchronize with *GoldMine*. By default, *GoldMine* selects the **Business** address category.

**Default Address phone labels** Identifies the labels, or titles, used for the five phone fields. You can *either* accept the original default labels, *or* select new labels from the corresponding drop-down list. If you change the label, *GoldMine* will apply the new label *only* to *new* contacts synchronizing *from GoldMine* to Pilot. Phone labels in existing records will *not* change.

**Default ToDo category** Specifies the default Pilot to-do category to synchronize with *GoldMine*. By default, *GoldMine* selects the **Business** to-do category.

When done, you can *either* select another tab to continue defining advanced settings, *or* you can select **OK** to return to the **Pilot Synchronization Options** dialog box.

### Setting Advanced Options for Windows CE Synchronization

When you select **A**dvanced from the **WinCE device Synchronization Options** dialog box, the **Advanced Options** window appears.

**Advanced Options window for Windows CE synchronization**

**Advanced Options**

General | Field Mapping | New Item Settings

Calendar date range

Please select the starting and ending ranges that will determine which calendar activities in GoldMine will be retrieved during a synchronization session with WinCE device.

Starting 0 Day before today

Ending 1 Month after today

Phone extension separator: .

Maximum characters in contact notes: 2048

Sync deletions from WinCE device to GoldMine

Sync deletions from GoldMine to WinCE device

Ignore last sync date

OK Cancel

You can select any of the following tabs to define synchronization settings:

- **General:** defines the range of dates from which activities are selected for synchronization, deletions to be synchronized, and other settings, such as the character to use for designating telephone extensions and the maximum number of characters to include for notes from contact records. Defining these settings is the same for *GoldMine*-WinCE synchronization as defining settings for *GoldMine*-Outlook synchronization—see “Defining General Advanced Options” on page 6.
- **Field Mapping:** defines “matches” between fields so that *GoldMine* can place data in the corresponding target WinCE fields. Mapping fields between *GoldMine* and WinCE is the same as mapping fields between *GoldMine* and Outlook—see “Mapping Fields” on page 9.
- **New Item Settings:** defines default values and notification options—see “Defining Default Settings and Alarms” in the following section.

### Defining Default Settings and Alarms

You can specify the default values for new appointment and tasks, as well as how you want to present alarms in Windows CE, from the **New Item Settings** tab of the **Advanced Options** window.

#### New Item Settings tab

New Item Settings

New CE Appointment/Task default values:

Show time as: Busy

Priority: Normal

Set reminder before the: Start Date

Notification Options:

Sound  
Alarm1  Repeat

Interrupt me with message

Flashing light

The **New Item Settings** tab contains the following options:

**Show time as** Specifies how the user will appear in the Windows CE calendar for new activities:

- **Free**
- **Tentative**
- **Busy**
- **Out of Office**

**Priority** Sets the default priority for new activities as one of the following:

- **High**
- **Normal**
- **Low**

**Set reminder before the** Sets the reminder alert before the (optional) **Start Date** or **Due Date** for the task.



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To turn off any notification feature before the reminder occurs, you can edit the activity in Windows CE. For details about reminders, see your Windows CE documentation.

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**Sound** Plays the sound selected from the drop-down list on your Windows CE device. For Windows CE to replay the alarm until turned off, check **Repeat**.

**Interrupt me with message** Displays a **Calendar Reminder** over the current Windows CE display that shows details about the pending activity. To turn off the **Calendar Reminder**, select one of the following options from Windows CE:

- **Open**
- **Dismiss**
- **Postpone:** includes a drop-down list, from which you can select a delay period from a minimum of five minutes to a maximum of one week.

**Flashing light** Flashes a light on devices equipped with a light-emitting diode (LED).

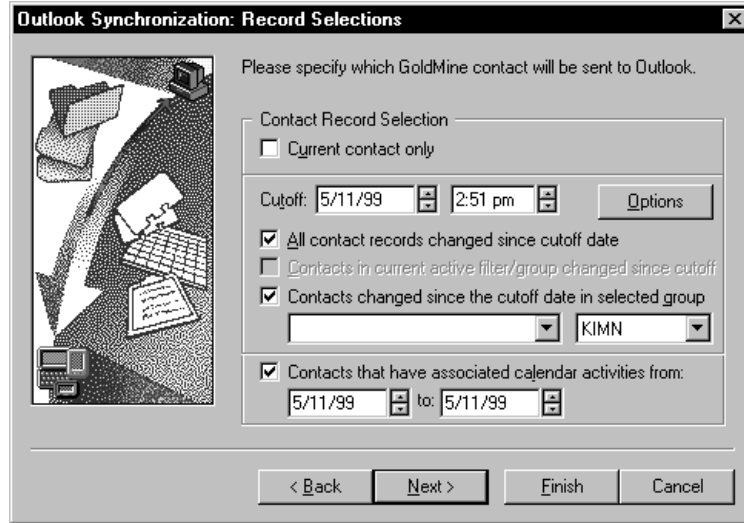
When done, you can *either* select another tab to continue defining advanced settings, or you can select **OK** to return to the **WinCE device Synchronization Options** dialog box.

### Selecting Contact Records to Send

When you advance after selecting *either* **Send and retrieve: To/From Outlook** or **Send only: To Outlook from GoldMine** from the **Outlook Synchronization Options** dialog box, the **Record Selections** dialog box appears.

This section refers to selecting records for *GoldMine*-Outlook synchronization. However, the options are the same for Outlook, Pilot, or Windows CE.

**Record Selections dialog box**



The **Record Selections** dialog box contains the following options for selecting contact records for *GoldMine* to send to Outlook:

**Current contact only**

Sends only the active contact record and linked calendar activities to Outlook.

**All contact records changed since cutoff date**

Sends all contact records and calendar activities created or modified after the **Cutoff** date (first field), *and* the time (second field)—these fields appear when you select this option. Typically, the date and time of the last transfer appears in these fields, so previously synchronized changes are not sent again.

*GoldMine* stores the date and time of the last synchronization, and these fields will automatically be filled the next time you select this option.

**Options** Displays the **Contact Transfer Set Creation Method** dialog box, from which you can specify the method you want to use to create your transfer set. *This option applies only to working with dBASE contact sets*—see “Selecting a Transfer Set Creation Method” on page 25.

**Contacts in current active filter/group changed since cutoff** Sends only new or changed contact records and calendar activities that belong to an activated filter or group.  
To select this option, you must activate a filter or group before working with the wizard.



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For details about activating filters and groups, see the following sections of the *User's Guide*:

- Filters: “Activating a Filter”
  - Groups: “Activating a Group”
- 

**Contacts changed since cutoff date in selected group** Sends new or changed contact records and calendar activities that belong to a selected group.

You can select a group by selecting *either*:

- **One of your own groups** (or the groups owned by the currently logged user): select a group name from the first drop-down list under the option  
*or*
- **Another user's group**: select another user from the second drop-down list, then select a group from the first drop-down list.

**Contacts that have associated calendar items from** Sends contact records with linked activities scheduled within the specified date range.

Type the beginning date for the range in the first field below the option, then type the ending date in the second field. By default, the current date appears in *both* range fields.

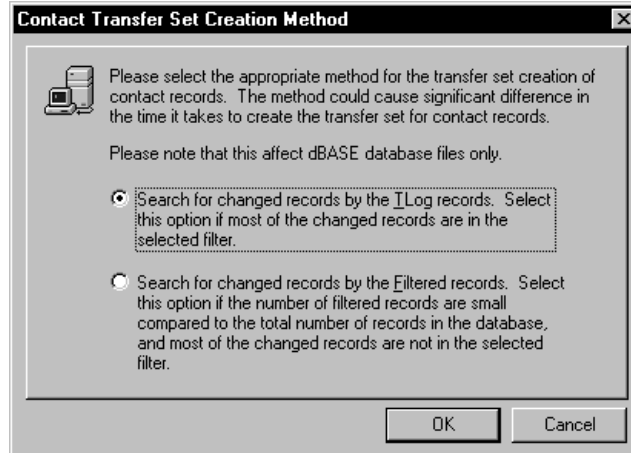
If you are ready to synchronize, select **Finish**. The **GoldMine Process Monitor** displays the progress of synchronization. Go to “Monitoring Synchronization” on page 28.

If you want to specify the activities (by user or user group) for *GoldMine* to send to Outlook, select **Next>**. The **User's Calendar Selection** dialog box appears. Go to “Selecting Calendar Activities to Send” on page 26.

### Selecting a Transfer Set Creation Method

When you select **Options** from the **Record Selections** dialog box, the **Contact Transfer Set Creation Method** dialog box appears. You can select a method from the **Contact Transfer Set Creation Method** dialog box to define how *GoldMine* will search for new or changed records when synchronizing records in a contact database with an activated filter or group. *This setting applies only when creating transfer sets from dBASE contact databases.*

#### Contact Transfer Set Creation Method dialog box



The **Contact Transfer Set Creation Method** dialog box contains the following options to specify the method for compiling data into a transfer set:

#### Search for changed records by the TLog records

*GoldMine* prepares a transfer set for synchronization by searching for *all* changed records, then applying the activated filter or group to the changed records.

This method is fastest if you are synchronizing most of the contacts in your contact set.

#### Search for changed records by the Filtered records

*GoldMine* searches for all filtered records first, which can reduce the number of records that *GoldMine* evaluates. Once the records are selected, then *GoldMine* prepares the transfer set for synchronization.

This method is fastest when the filtered records are a small subset of the total number of records, *or* if most changed records are not included in your filter or group.



For details about activating filters and groups, see the following sections of the *User's Guide*:

- Filters: "Activating a Filter"
- Groups: "Activating a Group"

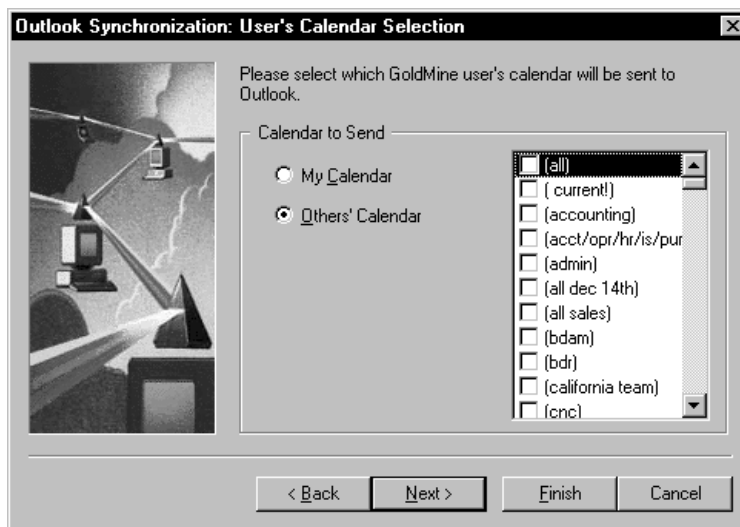
When done, select **OK** to return to the **Record Selections** dialog box.

### Selecting Calendar Activities to Send

When you advance from the **Record Selections** dialog box, the **User's Calendar Selection** dialog box appears.

This section refers to selecting records for *GoldMine*-Outlook synchronization. However, the options are the same for Outlook, Pilot, or a Windows CE device.

**Record Selections dialog box**



The **User's Calendar Selection** dialog box has two options for selecting calendar activities for *GoldMine* to send to Outlook:

- **My Calendar:** sends all activities scheduled for you (or the currently logged user)
- **Others' Calendar:** sends all calendar activities belonging to the user(s) or user group(s) selected from the list next to the options. Check each box corresponding to the user(s) or user groups that you want to select.

If you are ready to synchronize, select **Finish**. The **GoldMine Process Monitor** displays the progress of synchronization. Go to “Monitoring Synchronization” on page 28.

If you want to save the settings in a profile, select **Next>**. The **Ready to Synchronize** dialog box appears. Go to “Saving Settings in a Profile” on page 27.

## ***Linking Activities to your GoldMine Contacts***

*Pilot synchronization only.*

You can link activities or to-dos synchronized *from* your Pilot to contacts in *GoldMine*.

After you create the appointment in your Pilot, the cursor will appear on a line next to the starting time.

In the graffiti section, write / (forward slash), which activates the **Command** entry feature.

In the graffiti section, write L. The **Phone Number Lookup** screen appears.

Select the contact to whom you want to link the activity. Select **Add**. Pilot displays the following on the notes screen of the new activity:

*<first name> <last name> <default phone number> <default field type>*

The *<default field type>* character can be W, H, F, O, E, M, or P. For example, W represents “work.” For details, see your Pilot documentation.



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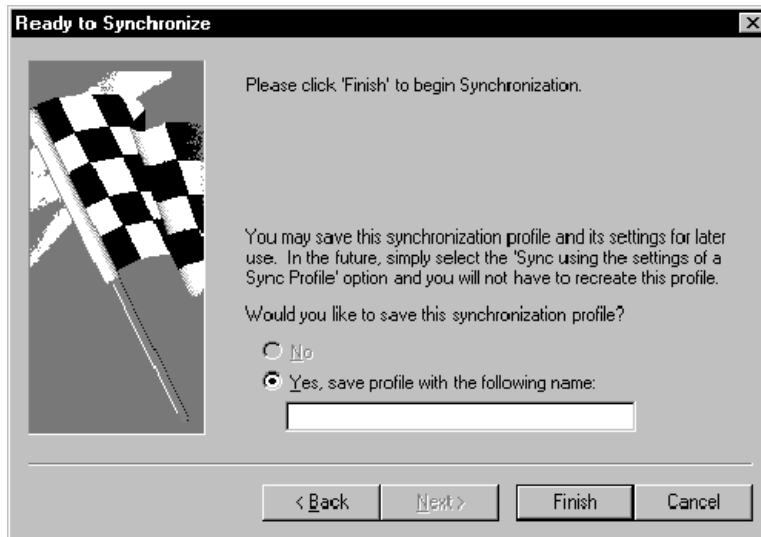
*Do not change the line that Pilot displays on the notes screen. Changing this line may result in incorrect synchronization.*

---

## Saving Settings in a Profile

When you are done defining synchronization settings, the **Ready to Synchronize** dialog box appears.

*Ready to Synchronize dialog box*



When you define synchronization options for the first time, *or* make changes to an existing profile, you must save your settings in a synchronization profile. Working with profiles eliminates the need to define settings before each synchronization.

From the **Ready to Synchronize** dialog box, type the name for your new profile under **Yes, save profile with the following name**

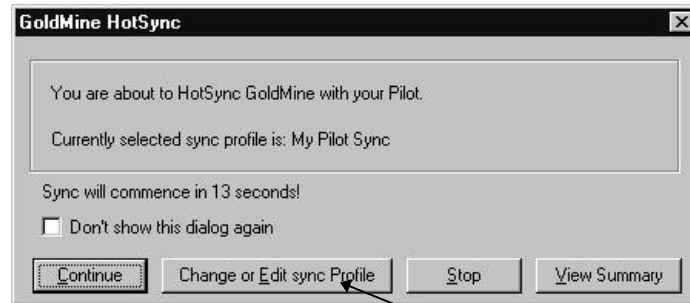
When done, select **Finish**. The **GoldMine Process Monitor** appears. Continue with “Monitoring Synchronization.”

## Checking HotSync Settings before Synchronizing with Pilot

You can check the selected Pilot synchronization profile from *GoldMine* before starting to synchronize.

When you select **Show HotSync dialog** from the **General** tab of the **Advanced Options** window (shown in the figure on page 5), the **GoldMine HotSync** dialog box appears before you start to synchronize with Pilot.

**GoldMine  
HotSync  
dialog box**



Displays the synchronization profile selected from the first screen of the **GoldMine Pilot Synchronization Wizard**

The **GoldMine HotSync** dialog box shows the currently selected profile for synchronizing with your Pilot, and contains the following options:

**Don't show this dialog again** Check this option if you do not want the **GoldMine HotSync** dialog box to appear before *GoldMine* starts synchronizing with your Pilot. By default, *GoldMine* displays this dialog box before starting to synchronize with Pilot.

You can also stop the **GoldMine HotSync** dialog box from appearing by selecting **Show HotSync dialog** from the **General** tab of the **Advanced Options** window in the **GoldMine Pilot Synchronization Wizard**

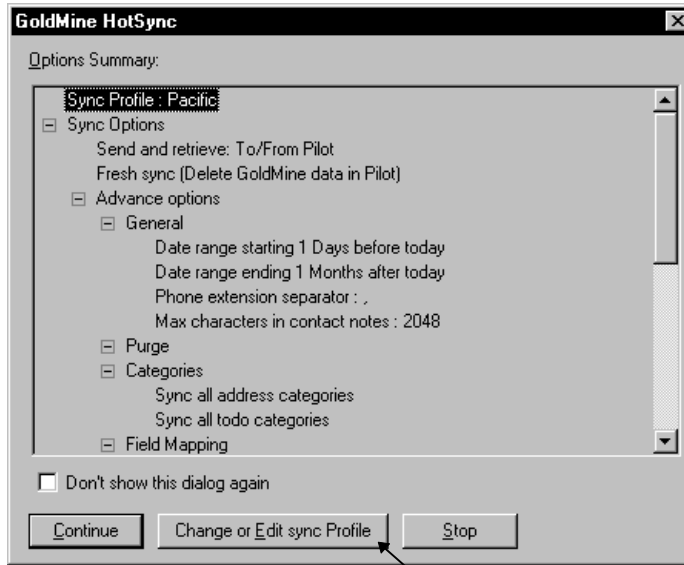
**Continue** Starts to synchronize with Pilot according to the profile selected from the first screen of the **GoldMine Pilot Synchronization Wizard**—see “Synchronizing with Microsoft Outlook, Pilot, or a Windows CE Device” on page 1.

**Change or Edit sync Profile** Displays the first screen of the GoldMine-Pilot Synchronization Wizard, from which you can make changes to the currently selected synchronization profile.

**Stop** Cancels synchronization with Pilot.

**View Summary** Displays the **GoldMine HotSync** dialog box, from which you can view all settings for the selected profile. The following figure shows an example of the summary view in the **GoldMine HotSync** dialog box.

**GoldMine  
HotSync  
dialog box  
(summary view)**



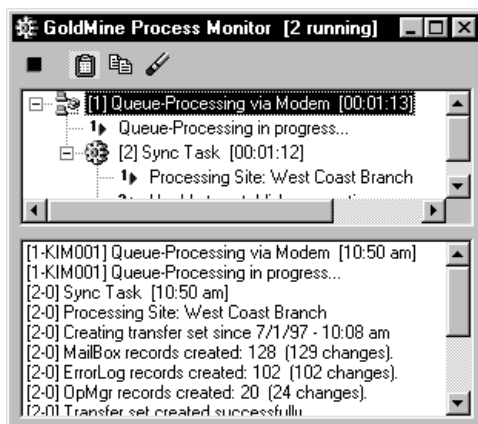
Select **Change or Edit sync Profile** to display the **GoldMine Pilot Synchronization Wizard**

## Monitoring Synchronization


Once you select **Finish**, *GoldMine* starts synchronizing. The **GoldMine Process Monitor** appears.

The **GoldMine Process Monitor** shows the progress of the current synchronization session. The upper pane shows the user who started the synchronization process, and each major level of the process. The lower pane shows the processing of each component task, including the creation of the transfer set, as shown in the following figure.

**GoldMine  
Process Monitor**



Since the **GoldMine Process Monitor** displays each step of the synchronization process, you can use the information to check that all of the data you selected is included in the transfer set. You can also use the detailed entries to troubleshoot any problems with a synchronization session.

To stop synchronization at any time, you can select the process in the **GoldMine Process Monitor**, then select .



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