

GOLDMINE[®] 5.0

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

October, 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, you can synchronize updated information with any of the following applications or devices:

- Microsoft Outlook 98 or Outlook 2000*. *GoldMine 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.

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.

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

To synchronize GoldMine with:

- **Pilot**—from the Main Menu, select **File|Synchronize|Synchronize with 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|Synchronize|Synchronize with 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|Synchronize|Synchronize 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.

* 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 29.

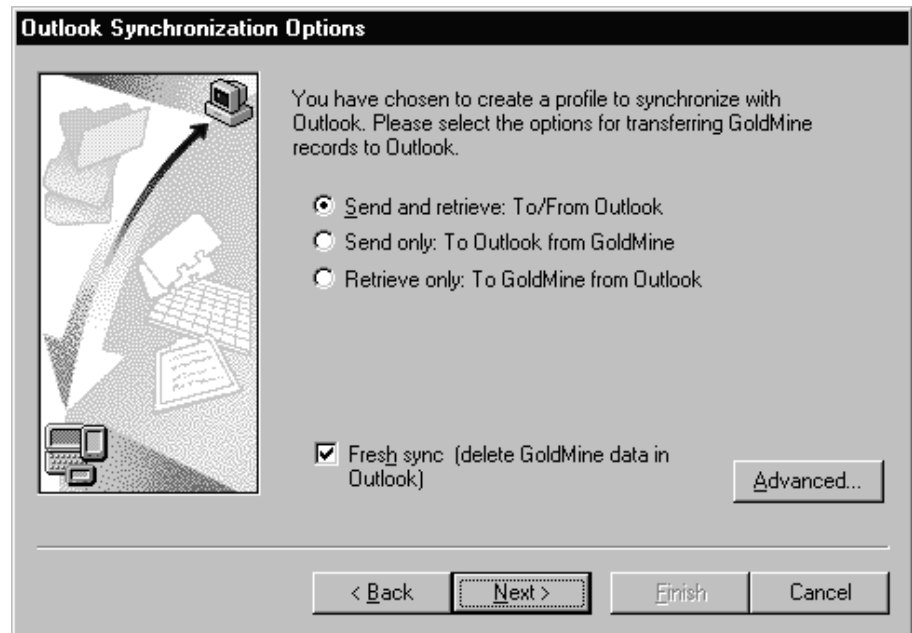
However, to check or change any existing settings, you can continue through the wizard.

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 (X) and a tabbed interface with tabs for **General**, **Field Mapping**, **Contacts**, **Calendar**, and **Task**.

Calendar Date Range

Please select the starting and ending date ranges that will determine which new Outlook appointments will be retrieved during a synchronization session.

Starting: 1 Day before today

Ending: 1 Month after today

Phone extension separator: .

Maximum characters in contact notes: 2048

Sync deletions from Outlook to GoldMine

Sync deletions from GoldMine to Outlook

Retrieve all data from Outlook regardless of last sync date.

Synchronize RSVP

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—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.



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

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.



For details on entering information in GoldMine's Notes tab, see "Add notes to a contact record" in the online How Do I.

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 29.

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

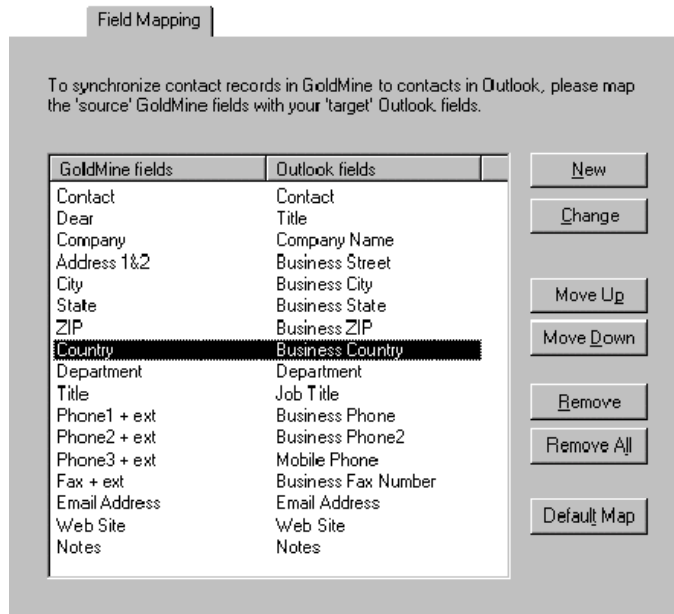
When done, you can *either* select another tab to continue defining advanced settings, *or* you can select **OK** to return to the **Outlook Synchronization Options** dialog box.

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



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.



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.

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.



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.

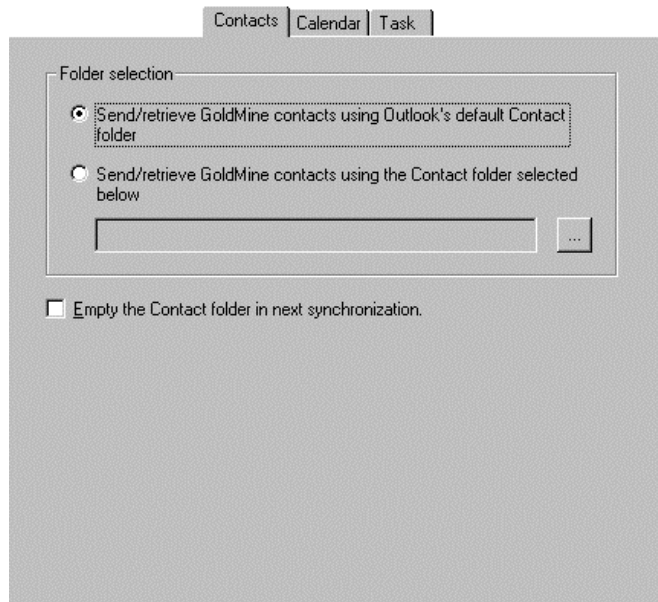
Defining Contact, Calendar, and Task Folders in Outlook

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 shows 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 in the specified folder *before* the next synchronization. *Back up your Outlook 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 29.
- **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 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.

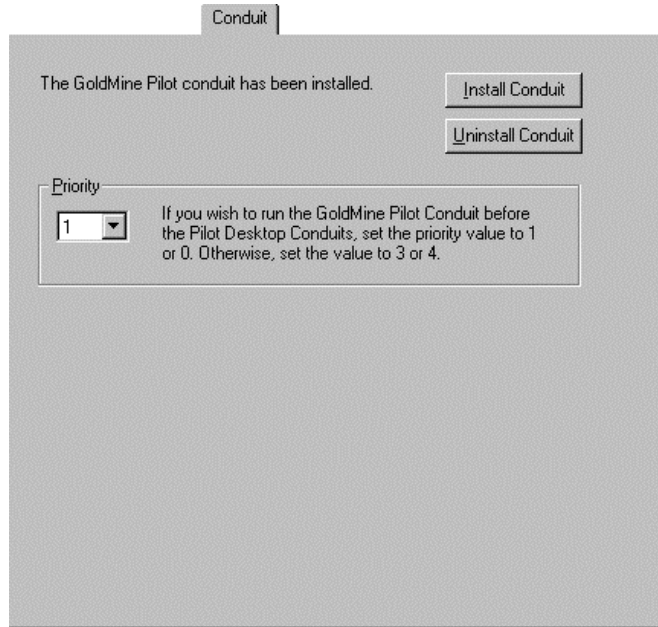
Once you install the Palm Desktop software on your system and check the default conduit, you can synchronize GoldMine with your Pilot. GoldMine installs the necessary conduit automatically. During your first synchronization, GoldMine prompts you:

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

To install the conduit, then synchronize, select Yes.

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.



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

You can select data that 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 three 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:

- **A**ddress book
- **D**ate book
- **T**o-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 do *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.

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 selected category. The default categories are **Unfiled**, **Business**, and **Personal**. If you have added categories, the new categories will appear in this pane after your first successful synchronization with the Pilot.

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 image shows a screenshot of the 'Defaults' tab in a software window. The window has a title bar with the text 'Defaults'. Below the title bar, there are three main sections, each with a label and a control element:

- Default Address category:** A dropdown menu with 'Business' selected.
- 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 ToDo category:** A dropdown menu with 'Business' selected, and a list box below it containing 'Unfiled', 'Business', and 'Personal'. 'Business' is highlighted in the list box.

The Defaults tab contains the following options:

Default Address category Specifies the default address category to synchronize with GoldMine. All contacts created in GoldMine will be placed in the specified category. 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. All To-do activities created in GoldMine will be placed in the specified category. 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 **Advanced** 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

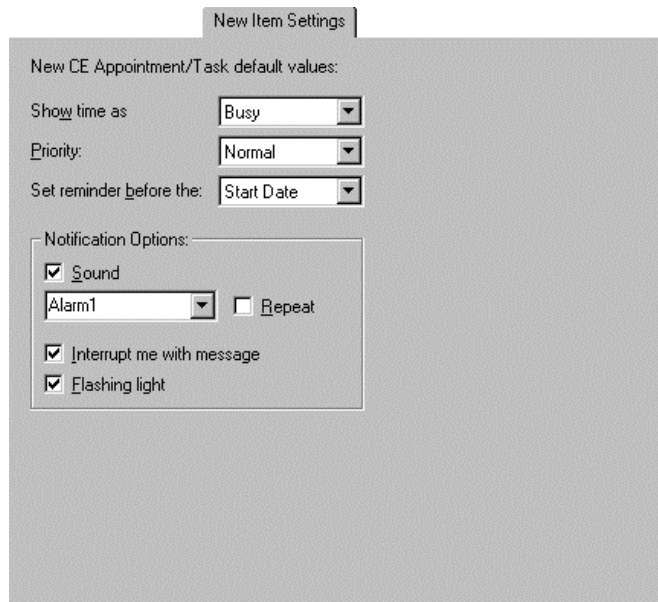
You can select any of the following tabs to define synchronization settings:

- **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 appointments 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.



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.

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).

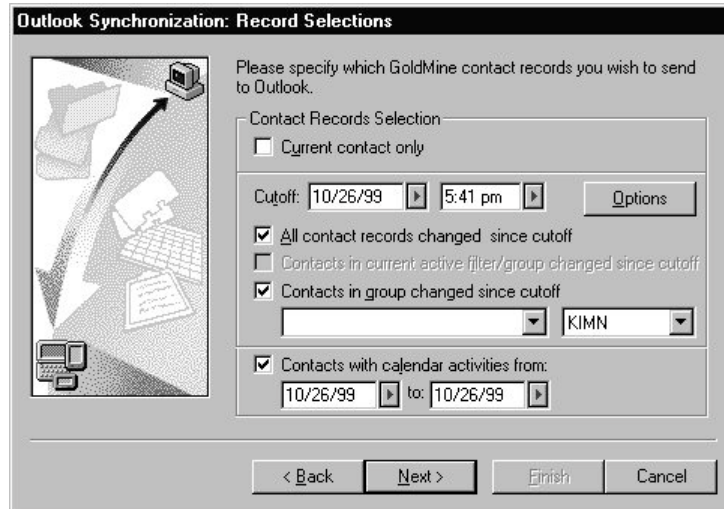
When done, you can *either* select another tab to continue defining advanced settings, *or* you can select **OK** to return to the WinCE device Synchronization Options dialog box.

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, to prevent previously synchronized changes from being sent again.

GoldMine stores the date and time of the last synchronization, and these fields will automatically be updated 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 contact records and calendar activities belonging to an activated filter or group that have been changed since the specified cutoff date.
To select this option, you must activate a filter or before working with the wizard.



For details about activating filters and groups, see the following sections of the online Help:

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

Contacts changed since cutoff date in selected group Sends only contact records and calendar activities belonging to a selected group that have been changed since the specified cutoff date.

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, and you are using an existing profile select **Finish**. The **GoldMine Process Monitor** appears. Go to “Monitoring Synchronization” on page 29.

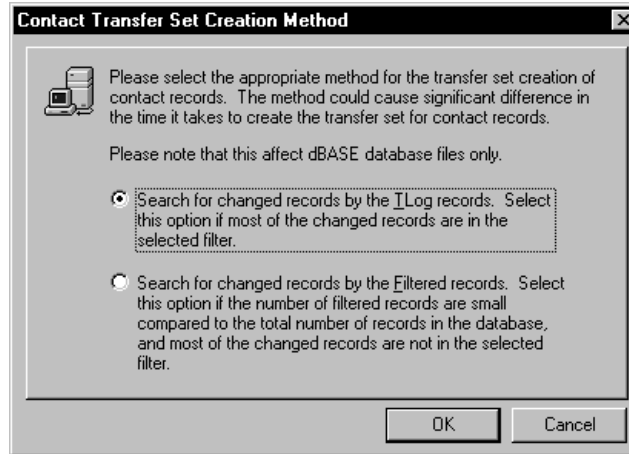
If you are creating a profile, you must continue through the wizard so that you can name and save the profile.

If you want to specify the activities (by user or user group) for GoldMine to send to Outlook, select **N**ext>. 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 **O**ptions 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 online Help:

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

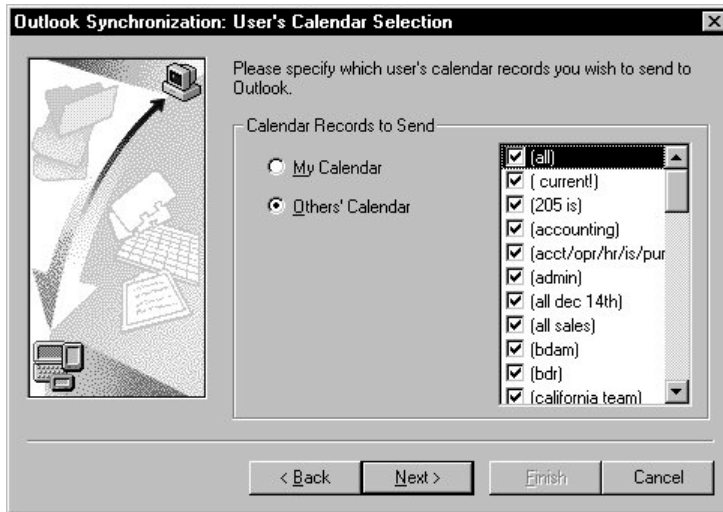
When done, select OK to return to the Record Selections dialog box.

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.

User's Calendar Selection 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, and you are using an existing profile select **Finish**. The GoldMine Process Monitor appears. Go to "Monitoring Synchronization" on page 29.

If you are creating a profile, you must continue through the wizard so that you can name and save the 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.

To add text to the reference line, write : (colon) in the graffiti area of the Pilot, immediately after *<default field type>*. Any text that you add after : (colon) appears in the **Reference** line of GoldMine without affecting the activity's link.

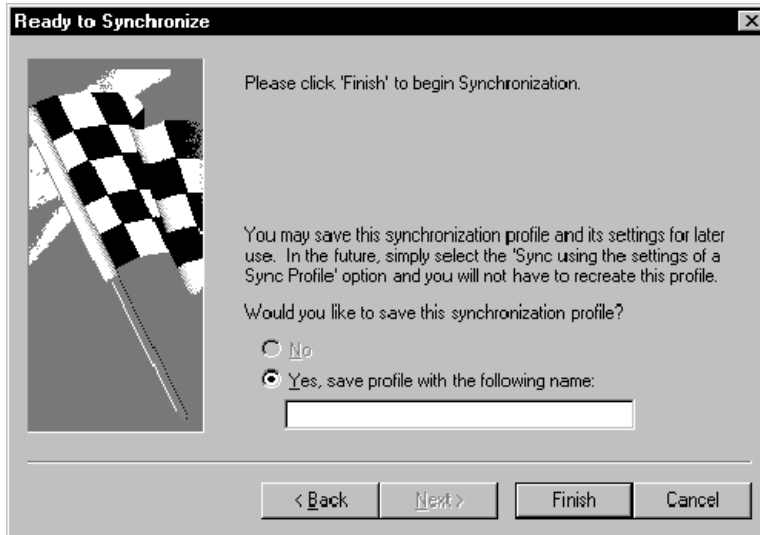


Do not change the line that Pilot displays on the notes screen. Changing this line may result in incorrect synchronization.

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**.

If you are synchronizing with a Palm Pilot (only), a prompt will ask you to click the **HotSync** button on the Palm cradle. The **HotSync** dialog box appears. When you click **Continue**, the **GoldMine Process Monitor** appears.

If you are synchronizing with Outlook or a Windows CE device, 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*



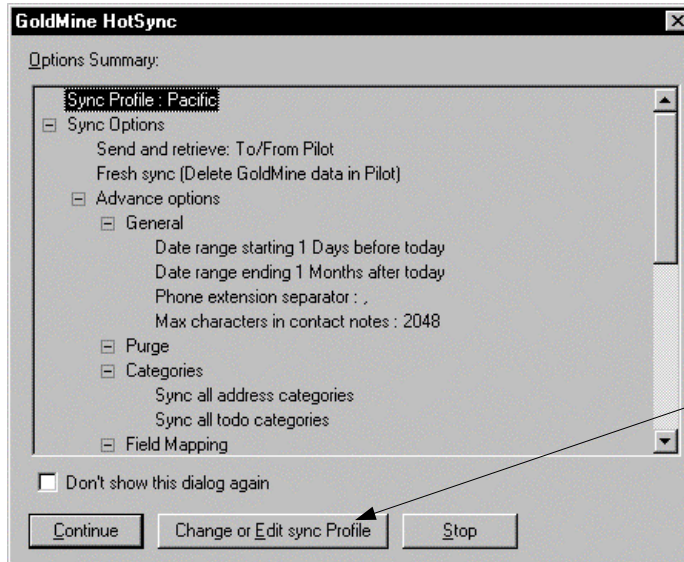
Displays the synchronization profile selected from the first screen of the **GoldMine Pilot Synchronization Wizard**

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 unchecking **Show HotSync dialog** from the **General** tab of the **Advanced Options** window in the **GoldMine Pilot Synchronization Wizard**.
- Continue** Starts the synchronization process 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)*



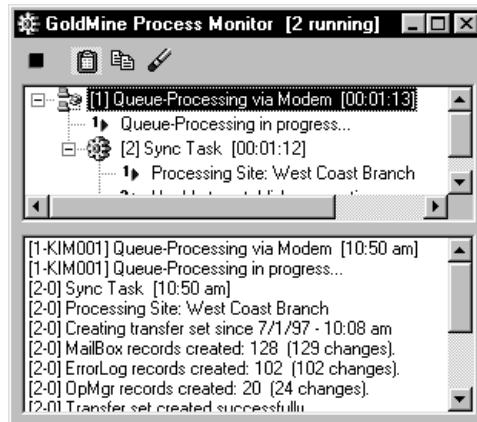
Select **Change or Edit** sync Profile to display the GoldMine Pilot Synchronization Wizard.

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, select the process in the **GoldMine Process Monitor**, then select .

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