

Configuring Synchronization with Palm/Treo

Copyright © 2005 FrontRange Solutions Inc.

Author: Aimee Gahagan
Department: Technical Support
Created: May 13, 2005
Last Updated: May 19, 2005

Copyright

Copyright © 2005 FrontRange Solutions Inc. All Rights Reserved. GoldMine,, HEAT and other FrontRange products and brands are registered trademarks or trademarks of FrontRange Solutions Inc. in the U.S. and/or other countries. Other products and brands are registered trademarks or trademarks of their respective owners/companies.

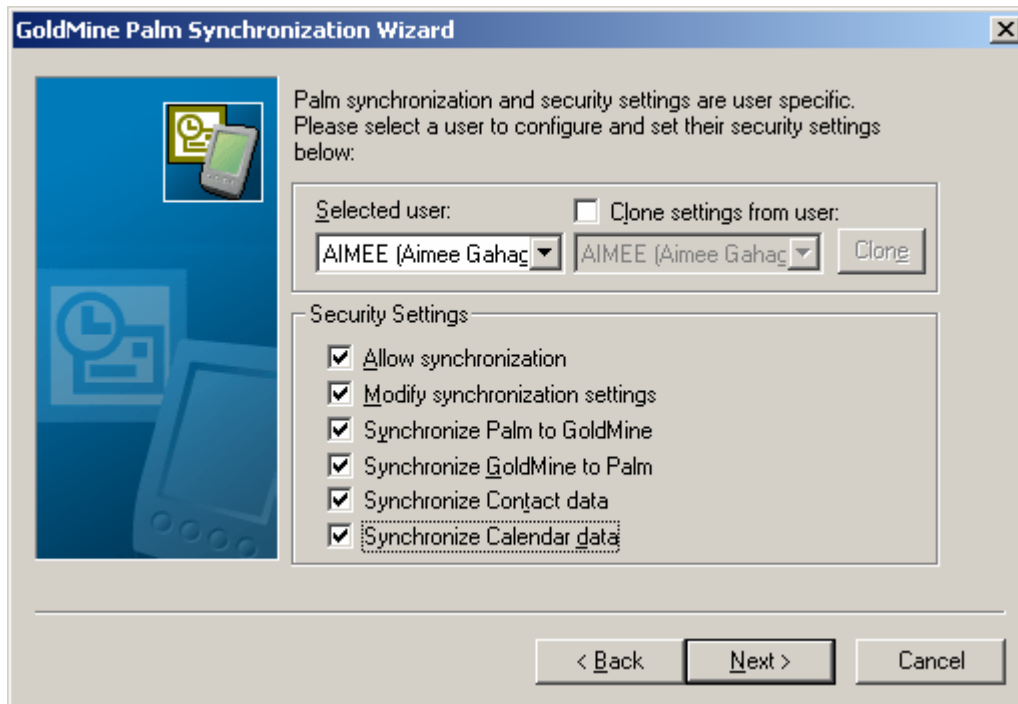
USE OF THE SOFTWARE DESCRIBED IN THIS PAPER AND ITS RELATED USER DOCUMENTATION ARE SUBJECT TO THE TERMS AND CONDITIONS OF THE APPLICABLE END-USER LICENSE AGREEMENT (EULA).

The information contained in this document is provided “as is” without warranty of any kind. To the maximum extent permitted by applicable law, FrontRange Solutions disclaims all warranties, either express or implied, including the warranties for merchantability and fitness for a particular purpose; and in no event shall FrontRange Solutions or its suppliers be liable for any damages whatsoever including direct, indirect, incidental, consequential, loss of business profits or special damages, even if advised of the possibility of such damages.

Configuring Synchronization with Palm/Treo

Within Palm you can create activities, link them to contacts, and then synchronize them with GoldMine. A GoldMine administrator or user with master rights must perform these steps for any user wishing to synchronize with a Palm/Treo.

1. Select **File>>Synchronize>>Synchronize with Palm/Treo** to launch the *GoldMine Palm Synchronization Wizard* which allows the administrator to enable synchronization and assign user permissions.
2. Click **Next**. The following dialog box appears.



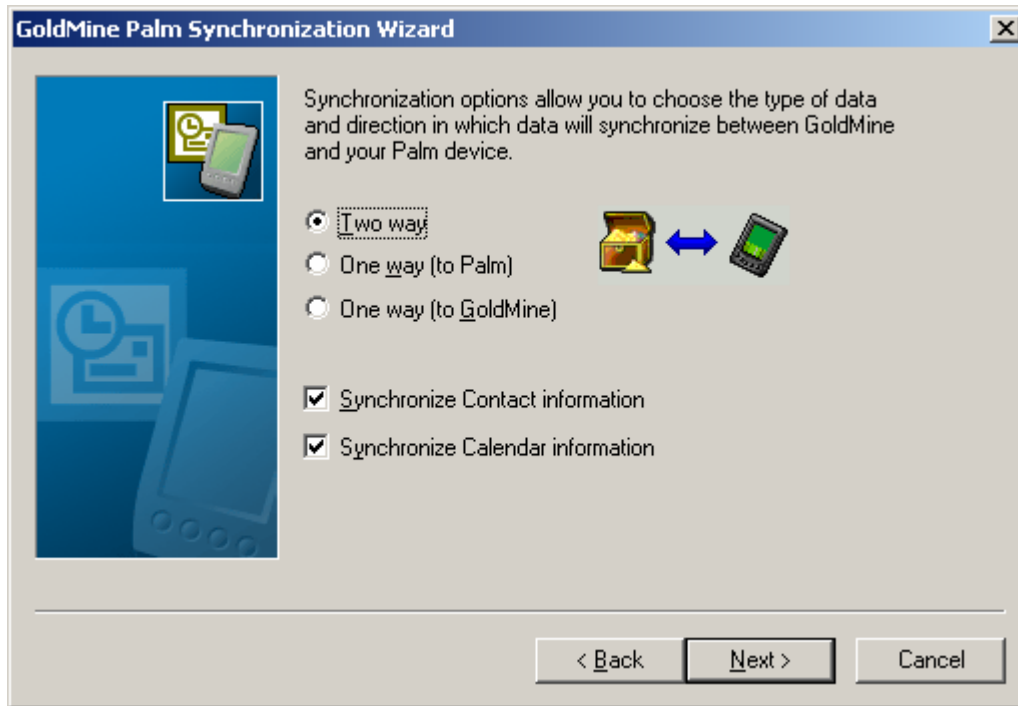
3. Select a user from the *Selected user* drop-down list to configure their security settings by selecting the appropriate check boxes. You may also clone settings from another user by selecting the *Clone settings from user* check box, choosing a user from the drop-down list, and clicking the *Clone* button.

Select from the following security settings check boxes:

- Allow synchronization
- Modify synchronization settings
- Synchronize Palm to GoldMine
- Synchronize contact data
- Synchronize calendar data

4. Click **Next**.

5. The following dialog box appears allowing you to choose the type of data and the direction in which the data will synchronize between GoldMine and your Palm device.



The radio buttons allow you to select the synchronization direction and include:

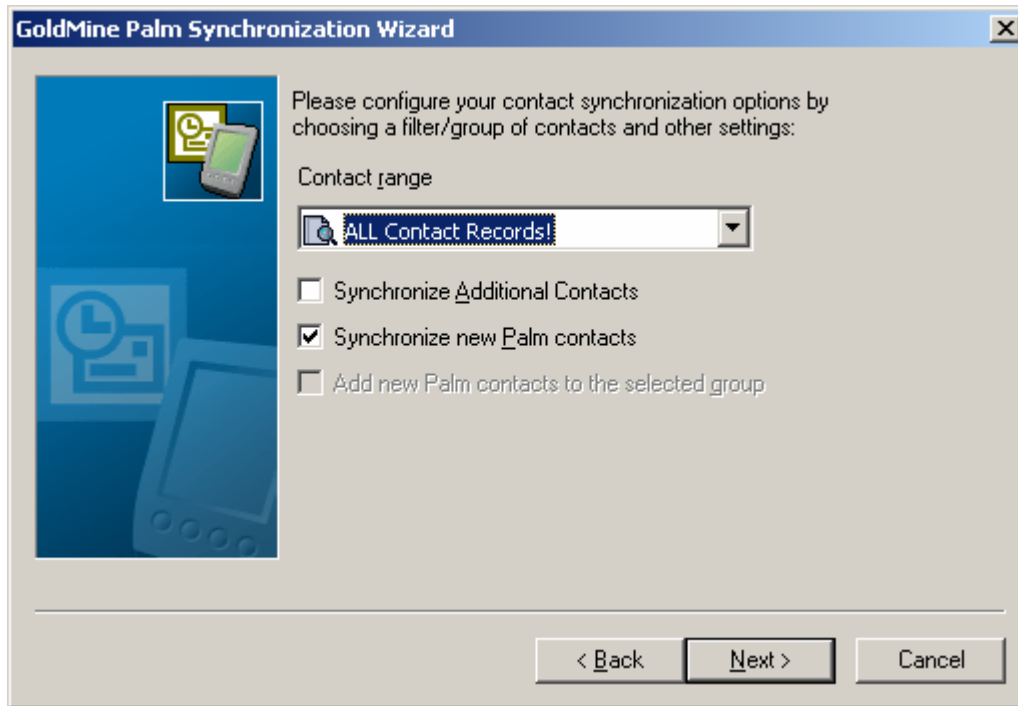
- Two way
- One way (to Palm)
- One way (to GoldMine)

The check boxes allow you to:

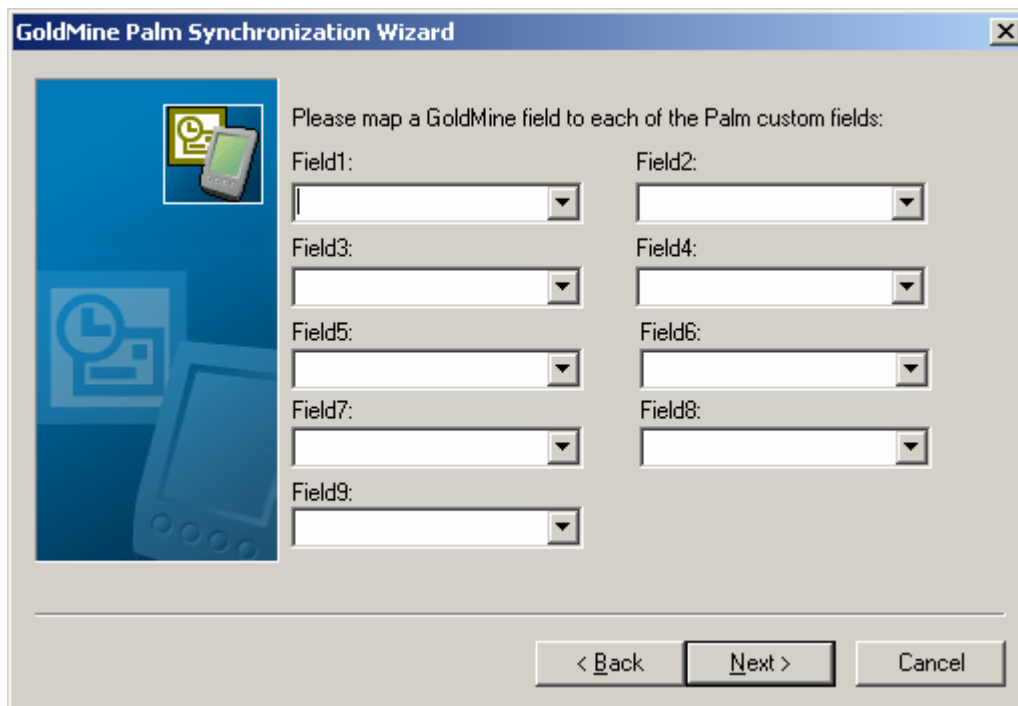
- Synchronize contact information, and/or
- Synchronize Calendar information

5. Click **Next**.

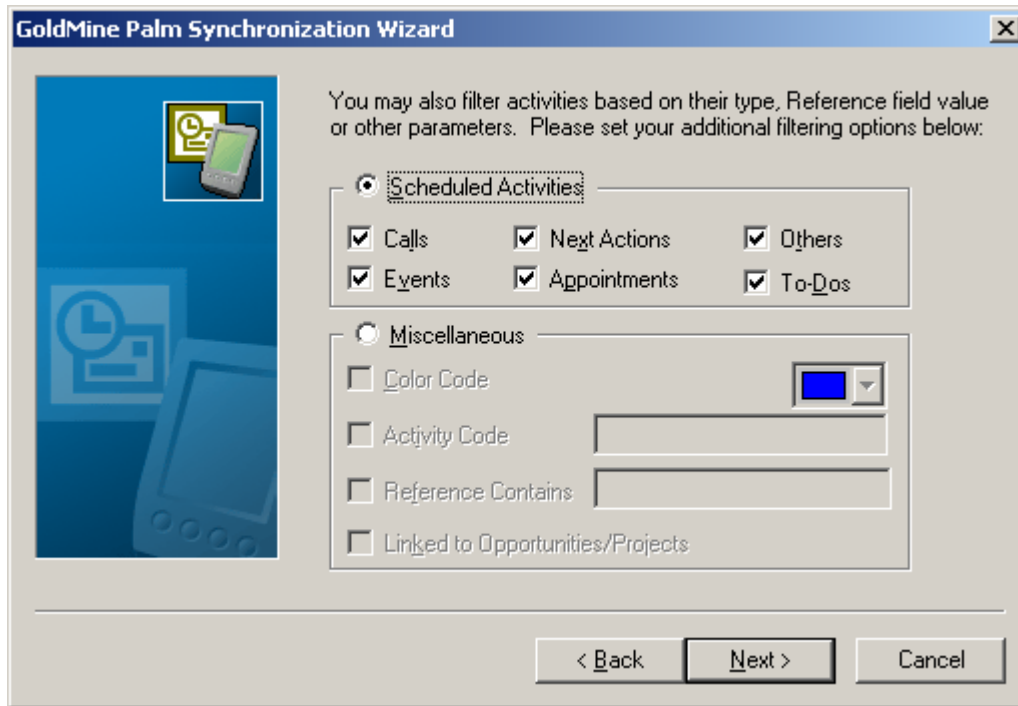
- The following dialog box appears. This dialog box allows you to configure contact synchronization options by choosing a filter and/or group of contacts and other settings.



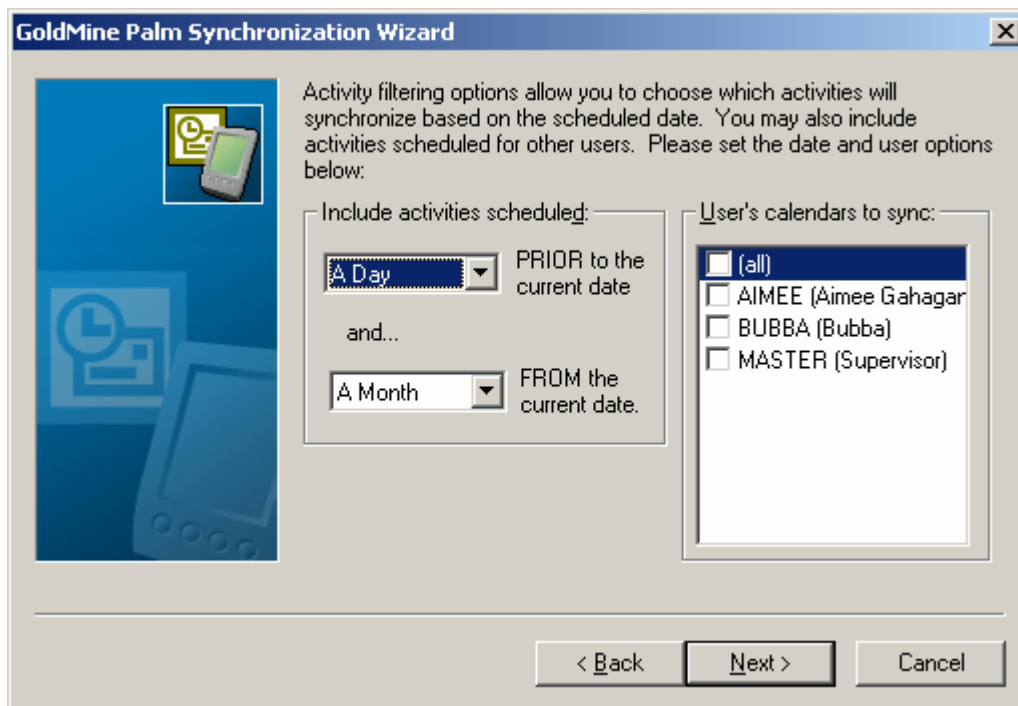
- Click **Next**. The following dialog box appears. This dialog box allows you to map up to 9 GoldMine data fields to custom Palm data fields.



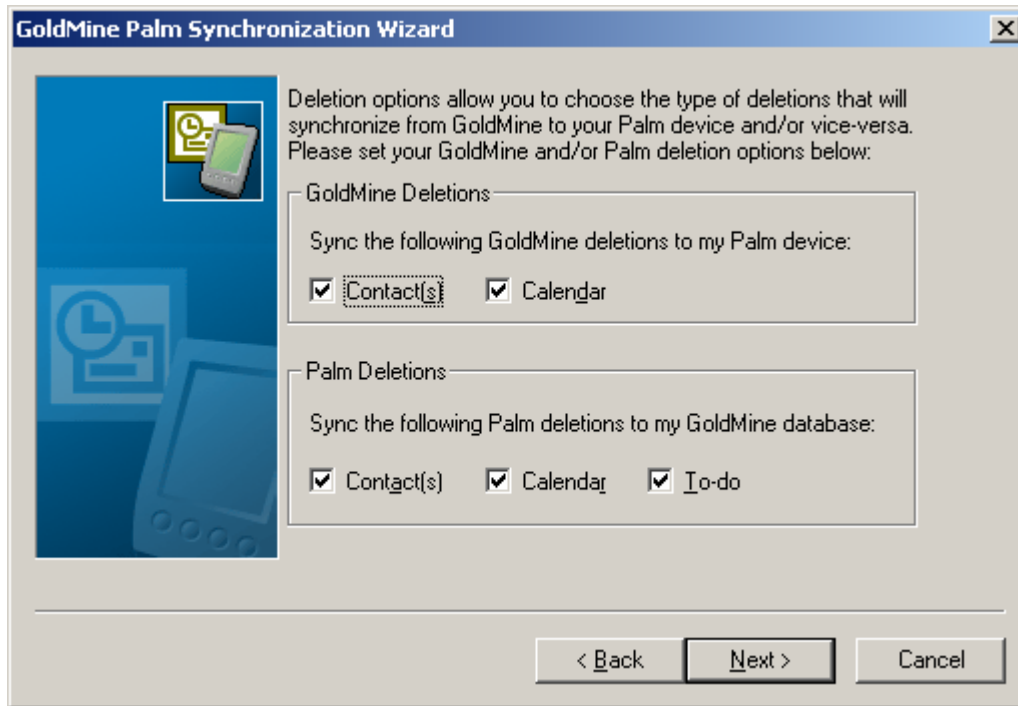
7. Click **Next**. The following dialog box appears. This dialog box allows you to filter activities based on their type, Reference field value, or other parameters.



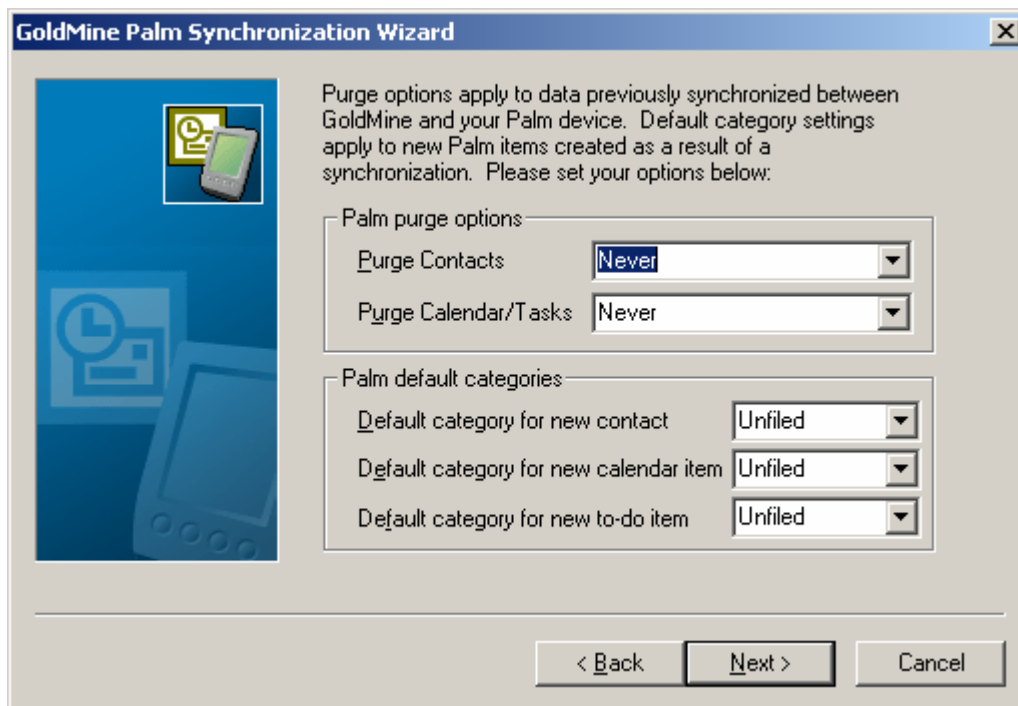
8. Click **Next**. The following dialog box appears. This dialog box allows you to choose which activities will synchronize based on the schedule date.



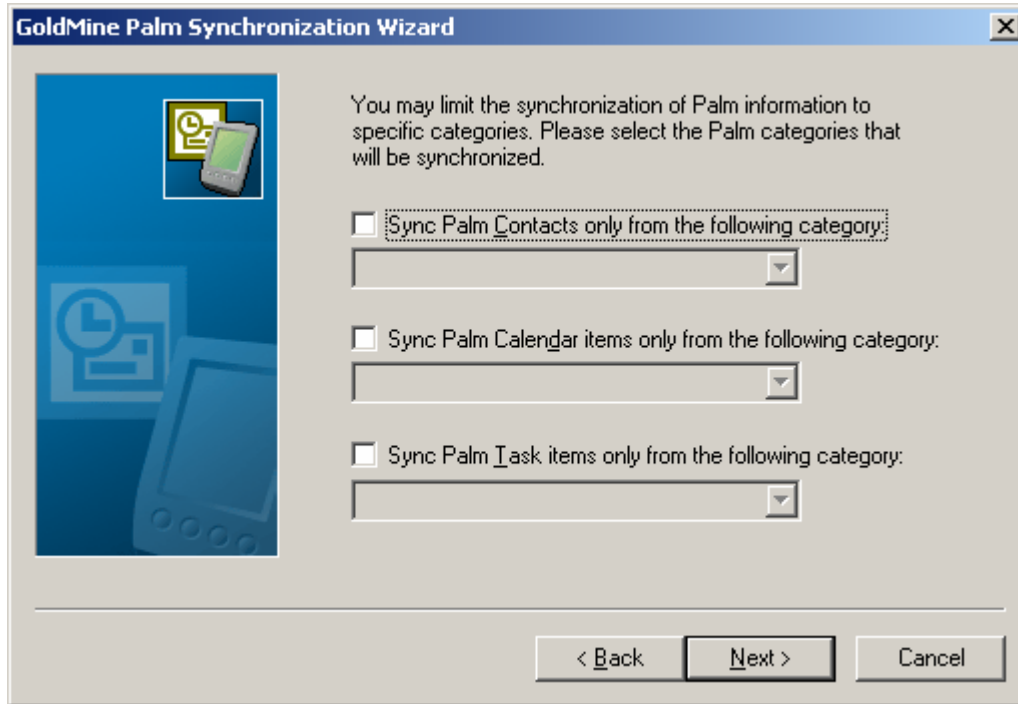
9. Click **Next**. The following dialog box appears allowing you to choose the type of deletions that will synchronize.



10. Click **Next**. The following dialog box appears allowing you to set purge options for previously synchronized data.



11. Click **Next**. The following dialog box appears allowing you to limit the synchronization of Palm information to specific categories.



12. Click **Next**. The final dialog box appears. If you are satisfied with your previous selections, click **Finish**. If you wish to make changes, click **Back**.

