CompanionLink

CompanionLink User's Guide

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Technical Support

Technical support for all purchased products is available free of charge by calling our technical support department.

CompanionLink Software, Inc.
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Fax: (541) 412-0500
Email: support@companionlink.com

Visit our Website: http://www.companionlink.com
Online Step Guide: http://www.companionlink.com/CL SetupGuide.html
Online Knowledge Base: http://www.companionlink.com/knowledge.html

GETTING STARTED

Thank you for purchasing CompanionLink. CompanionLink is a new generation synchronization tool that moves contact, calendar, to-do and memo information from your contact manager to many types and brands of handheld organizers.

FOUR-STEP QUICK-START

STEP 1: Install the software that is supplied with your handheld organizer onto your computer.

STEP 2: Start the software that is supplied with your handheld organizer. In the desktop application, enter an appointment for 10:00 a.m. Configure your synchronization options and then run the synchronization software with the handheld organizer, except Psion and OnHand. For Psion, run "Backup." Make sure the appointment is at 10:00 a.m. on the handheld.

> **PLEASE DO NOT INSTALL OR RUN COMPANIONLINK UNTIL YOU KNOW THAT YOUR HANDHELD DESKTOP MANAGER IS INSTALLED AND WORKING.**

STEP 3: Install CompanionLink. Configure via "Settings" to select your handheld organizer and main personal information manager. For more detailed setup, select "Category Manager" and "Application Settings" for each of the handheld applications – Address Book, Datebook, ToDo List, and Memo (if applicable).

STEP 4: For Palm OS organizers, press the HotSync button to synchronize data. For all other organizers, press the "Synchronize" button on the main CompanionLink screen.

HOW COMPANIONLINK WORKS

CompanionLink synchronizes your information between your contact manager and your handheld organizer. CompanionLink can transfer data from your contact manager to your handheld, from your handheld to your contact manager, or both.

CompanionLink reads data directly from your Contact Manager and launches the synchronization process that performs the data transfer to and from the handheld. Because the synchronization process is automatic, CompanionLink runs as a "One-Step" procedure.

INSTALLATION

BEFORE INSTALLING COMPANIONLINK

Before installing CompanionLink, you must install the desktop software that came with your handheld device.

For Palm OS devices, Palm Desktop must be installed.

For VTech Helio, CellVic and OnHand, install the connection software that came with your handheld device.

For organizers using the Windows CE/Pocket PC operating system, be sure that Active Sync 3.0 or higher is installed. Further, Outlook 97/98/2000/2002 or Schedule Plus 7.0a/7.5 must be installed as the desktop application.

For Psion/EPOC organizers, install PsiWin version 2.2/2.3.

For other handheld devices, install the connection software that came with your organizer.

TEST THE ORGANIZER CONNECTION

Before installing CompanionLink, you should test the synchronization system by entering a small amount of data and making sure it moves correctly to the handheld organizer.

Open the desktop software that came with your handheld device. In the Calenar application, enter an appointment for 10:00 am. Next, select the process for synchronization.

> For Palm OS devices, press the HotSync button.
> For Windows CE/Pocket PC devices, open Active Sync and click the "Sync" button.
> For Vtech Helio, Start Vsync manager on the handheld. Push the Sync button on the cradle, then OK.
> For CellVic select Applications on handheld. Select AutoSync >> Start
> For Psion, run straight "Backup".
> For OnHand, place unit in docking station and view the data in the desktop.

Once the synchronization is complete, check the following:
> 1) Is the appointment on the handheld?
> If not, check your connections and synchronization settings, then correct them to ensure the appointment is synchronized.
> 2) Does this appointment appear at 10:00 a.m. on the handheld?
> If not, check your Windows time zone settings. Be sure that they match the time zone settings on the handheld device. Some organizers are highly sensitive to time zone and "local time" settings.

When you can properly transfer a single appointment from the desktop application to the handheld organizer, then you are ready to install CompanionLink.

COMPANIONLINK INSTALLATION

Place the CompanionLink disk #1 in the floppy disk drive. From the Windows Start bar, select
Start >> Run and type "A:/Setup". Select OK and run the installation program.

> NOTE: COMPANIONLINK SUPPORTS WINDOWS 95/98/ME/NT/2000/XP. COMPANIONLINK
>   DOES NOT RUN UNDER WINDOWS 3.1 OR MACINTOSH OPERATING SYSTEMS.
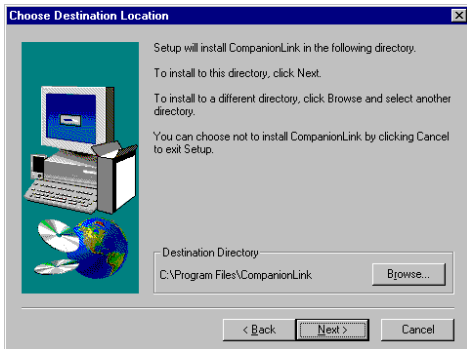
The InstallShield Wizard will prompt you for the information necessary to complete the
installation process. It is best to install CompanionLink to the default location. An icon will be
placed on the desktop as well as in the Programs menu to run CompanionLink.

RUNNING COMPANIONLINK

The CompanionLink icon can be found in the Start menu **using Start >> Program Files >> CompanionLink**. Double click on the icon to run the program.
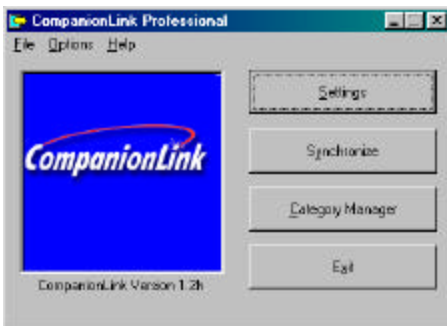
SETTINGS This button allows you set options for your handheld organizer, personal information manager, transfer method and other functions.

CATEGORY MANAGER Customize synchronization and select additional features. If you have CompanionLink Professional, you will be able to select additional data files and contact managers.

SYNCHRONIZE This button launches the synchronization process for some organizers. With Palm OS devices, start synchronization by pressing the HotSync button on the docking station.

COMPANIONLINK CONFIGURATION

To configure CompanionLink, select the "Settings" button from the main screen.

SELECT YOUR ORGANIZER TYPE

Select your organizer from the list on the following page. The list on your program may differ from that shown in this manual, because you may have a special version of CompanionLink, or we may have added more hardware drivers to the list.

As you select your organizer, CompanionLink will verify that you have a compatible version selected and that you have the correct files and Windows registry settings installed.

If you receive an error message at this point, please reinstall your organizer software and refer to the instructions in the previous section, regarding synchronization of an appointment, to verify that the organizer software is working correctly.
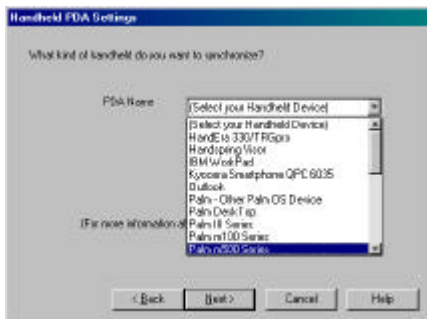
ORGANIZER TYPES

PALM III/V/VII   CompanionLink supports ALL Palm OS devices, including the early Pilot 1000 and 5000 units. New Palm OS devices such as SmartPhones are also supported. You must have Palm Desktop 2.0/3.0/4.0+ installed in order for CompanionLink to synchronize correctly.

PALM M100/M500
HANDSPRING
HANDERA
SONY CLIE

WINDOWS CE   Please designate which desktop software your device synchronizes with, either Outlook or Schedule Plus. CompanionLink writes data to the desktop software, and launches ActiveSync to move the data to the WinCE/Pocket PC device. Although Schedule Plus ships with some WinCE devices, it does not fully support the use of categories. More features are supported using Outlook.

POCKETPC
PSION/EPOC   CompanionLink supports all of these organizer families.
MATSUCOM ONHAND
CELLVIC
VTECH HELIO

DESKTOP ADDRESS BOOK AND CALENDAR

CompanionLink supports a variety of contact managers. In this initial configuration, you should select the one you use the most. This will become your Primary database for the purposes of CompanionLink configuration.
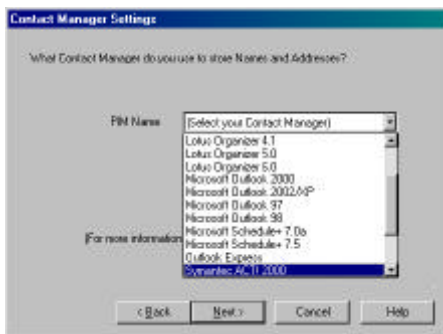
The list in your program may differ from that shown in this manual, as you may have a special version of CompanionLink, or we may have added more software drivers to the list.

If you have CompanionLink Professional, you will have the option of selecting multiple contact managers for a single synchronization process. This selection is done using the Category Manager.

CONTACT MANAGERS

ACT! CompanionLink supports versions 4.0/2000. Older versions do not have the required OLE interface library for CompanionLink.

GOLDMINE CompanionLink supports versions 4.0/5.0/5.5 – dbase ONLY. We expect to support SQL databases in the near future.

LOTUS ORGANIZER CompanionLink supports versions 4.1/5.0/6.0

LOTUS NOTES We expect to support Lotus Notes 5.0 and higher in the near future.

OUTLOOK CompanionLink fully supports versions 97/98/2000/2002/XP

SCHEDULE+ CompanionLink supports versions 7.0a/7.5.

PALM DESKTOP Palm Desktop versions 2.0/3.0/4.0 or higher may be designated a Contact Manager and CompanionLink will synchronize from Palm Desktop to another handheld, like a WinCE/Pocket PC or Psion/EPOC device.

TELEMAGIC CompanionLink supports versions 4.0.1/4.5/5.0

OTHER CONTACT MANAGERS WILL BE ADDED, SO YOUR LIST MAY INCLUDE NEW OPTIONS.

SELECT CONTACT FILE

Depending on your contact manager selection, you may be prompted to select a contact file (ACT!, Organizer) or a contact database (GoldMine).

SELECT USER NAME

Depending on your contact manager selection, you may be prompted for the user name for your database.

SELECT TRANSFER METHOD

The transfer method tab, available during configuration, allows you to choose which method will control the flow of data and how it is moved during the synchronization process.
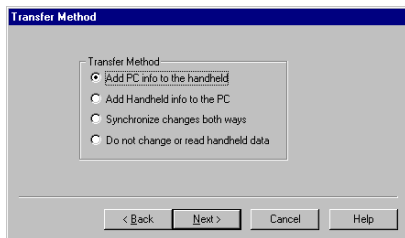
SELECTING TRANSFER METHOD

ADD PC INFO TO THE HANDHELD
This option moves data from your PC Contact Manager to the handheld organizer. Data on the organizer will remain there. Data on your PC Contact Manager will not be modified in any way.

ADD HANDHELD INFO TO THE PC
This option moves data from the Handheld to the PC Contact Manager. Data on the handheld will not be modified in any way.

SYNCHRONIZE CHANGES BOTH WAYS
For most organizers, CompanionLink moves data from the handheld to the PC Contact Manager, making the PC Contact Manager the "Master" database, then moves items to the handheld organizer. Data will be added to both the handheld and the PC Contact Manager.

DO NOT CHANGE OR READ HANDHELD DATA
This selection turns off all processing for this file.

CATEGORY MANAGER FOR COMPANIONLINK

If you are not using CompanionLink Professional, your category manager options are limited to the single contact manager that these versions support. You can use the Category Manager to exclude categories from synchronization, or to include them. You may not add categories or designate a category for a different contact manager or calendar application.

NOTE: There may be an additional configuration available for each application. To see this configuration, select the application, such as **DateBook**, and then press **Application Settings**. For many contact managers there are options controlling the number of notes, filters, and date ranges for appointments, all of which allow you to control memory usage and synchronization time to the handheld.
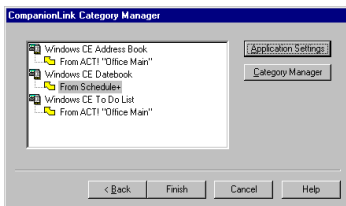
You can use multiple contact managers as shown in the sample screen above. You can configure the calendar to come from Microsoft Schedule+, while the contact database and to-do list come from the ACT! Database called "Office Main."

CATEGORY MANAGER FOR COMPANIONLINK PROFESSIONAL

CompanionLink Professional contains a full-featured Category Manager that allows you to configure individual categories on the handheld with separate sets of data from different data sources on your PC computer.
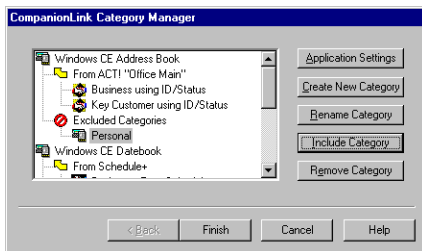
NOTE: Some organizers, notably Win CE via Schedule+, do not have category settings. While the Category Manager allows you to create categories for these organizers, data entered on the organizer will always be synchronized into the Primary PC contact manager, and not to any additional files specified using the Category Manager.

APPLICATION SETTINGS	Highlight the handheld application, in this case the Windows CE Address Book and press Application Settings to set features for the Primary contact manager to use with synchronization.
	You can also highlight any category name, and press Application Settings to set that category to use a different data file or PC contact manager.
CREATE NEW CATEGORY	Use this button to create a new category on your handheld organizer. NOTE: There is a limit of 15 categories for the Palm OS devices.
RENAME CATEGORY	Use this option to rename a category without changing any data that may already be synchronized with that category.
INCLUDE/EXCLUDE	If you exclude a category, all the data in that category on the handheld will be ignored by CompanionLink, and will not be synchronized with any PC contact manager. The data is still "Backed Up" according to the rules of the synchronization software that comes with your organizer.
	Use this feature to keep personal information on the handheld from being synchronized with the corporate database.
REMOVE CATEGORY	This option allows you to delete a category. Data on the handheld that is designated with this category will be moved to "Unfiled", but not deleted.

PRIMARY VERSES ADDITIONAL CATEGORIES

There is an important distinction between the primary category and additional categories when it comes to synchronizing multiple data sources.

The **Primary** category allows you to use a **Category Field**. This is a field in the database that names a category on the handheld. If a contact record has "Business" in the category field, and you have a handheld category called Business, then the record is placed in the Business category on the handheld.

Using this method, the Primary PC contact manager can fill multiple categories on the handheld organizer.

Additional Categories are those mapped to different data files. These files may have a field for category, but this field is ignored. All records from an additional file will be marked with the Additional Category name for their category on the handheld. So with the additional category "Vendors", a contact record may show a category name of "Business", but it will be put into the "Vendors" category on the handheld.

PC contact manager data specified using Additional categories will always fill a single category on the handheld.

When synchronizing, new data on the handheld will be added to the appropriate PC contact manager according to the category mapping.

COMPANIONLINK SYNCHRONIZE

If you are using a Palm OS device, you will initiate synchronization via CompanionLink by pressing the HotSync button on the docking station.

SPECIAL NOTE FOR WINDOWS CE AND POCKET PC DEVICES

CompanionLink supports synchronization for Windows CE/Pocket PC version 2.0 and higher. This support is implemented through the default synchronization services (ActiveSync) using Microsoft Outlook or Schedule+.

Before running CompanionLink, install ActiveSync and the desktop program (Outlook or Schedule+) as directed by your hardware manufacturer. If you have Outlook on your computer, use that as your desktop software. If you do not, Activesync will install the correct desktop software for you. Schedule+ does not have as many features as Outlook, notably Pocket Outlook categories, which are not synchronized when using Schedule+.

Before synchronizing, place your WinCE/Pocket PC device in the docking station and be sure that ActiveSync indicates you are connected. If your handheld device is not connected properly, CompanionLink will not be able to synchronize correctly.

After pressing "Synchronize" on the main CompanionLink screen, CompanionLink will launch ActiveSync and your data will be synchronized. Any additional WinCE/PocketPC functions, such as E-mail, Office documents, etc, will be synchronized via ActiveSync. CompanionLink does not synchronize data other than Contracts, Calendar and ToDo List.

Online Step Guide:
http://www.companionlink.com/CL_SetupGuide.html

Online Knowledge Base:
http://www.companionlink.com/knowledge.html

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