

CompanionLink™



CompanionLink™ User's Guide

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www.pdabuzz.com

Technical Support

Technical support for CompanionLink is available by contacting Royal/Olivetti. If you need assistance using CompanionLink, please contact Royal/Olivetti directly at the technical support number provided with your Organizer.

NOTE: CompanionLink does not run under Windows 3.1

Getting Started

Thank you for using CompanionLink. CompanionLink is a new generation of synchronization tool that can move contact and calendar information from your contact manager to many types and brands of handheld organizers.

- Step 1: Install CompanionLink. After installation is complete, select **Start** then **Program Files** then **CompanionLink** then **CompanionLink Setup**. This will allow you to walk through the Initial Options setup to select your organizer and desktop main contact management program.
- Step 2: Run CompanionLink by selecting **Start** then **Program Files** then **CompanionLink** then **CompanionLink**.
- Step 3: Once CompanionLink started, you are now ready to synchronize your data. In CompanionLink, click on the **Synchronize** button and follow the on screen instructions. The synchronization process will begin.

How CompanionLink Works

CompanionLink synchronizes your contact information between your contact manager and your organizer. CompanionLink can synchronize 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" process.

Installation

Place the CompanionLink disk into your floppy disk drive. From the Win95/98 Start Bar select **Start** then **Run...** and type in **A:SETUP**, then select OK to run the installation program.



The InstallShield Wizard will prompt you for the information necessary to complete the installation process and place a program icon in the Programs area to run CompanionLink.

Running CompanionLink

Launch CompanionLink by selecting **Start** then **Program Files** then **CompanionLink**.



Setup

This button lets you set the initial synchronization options for your organizer and select your main contact manager.

Synchronize

The synchronization process is launched by selecting **Time Mode** then pressing the **Link** button on the organizer.

Category Manager

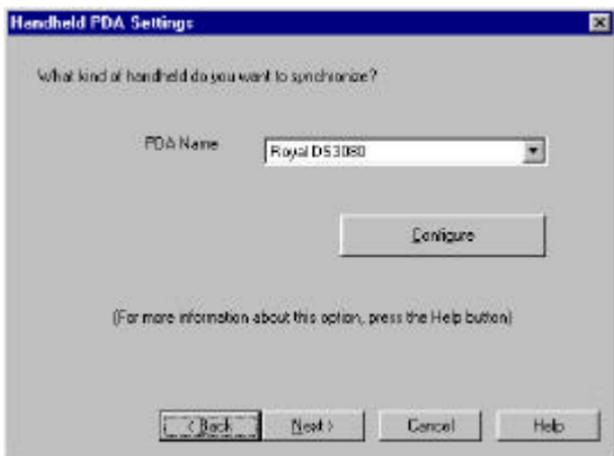
This button lets you customize the synchronization process and select additional features.

CompanionLink Configuration

To configure CompanionLink, select the **Set Initial Options** button from the Main Screen.

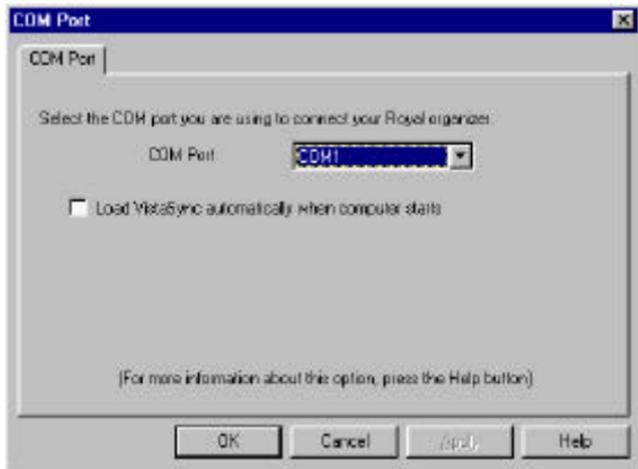
Selecting your Organizer

Select your organizer. The list on your program will only list the Organizer because you received a special version of CompanionLink. Please visit www.companionlink.com for a full list of PDA's and PIMs we support.



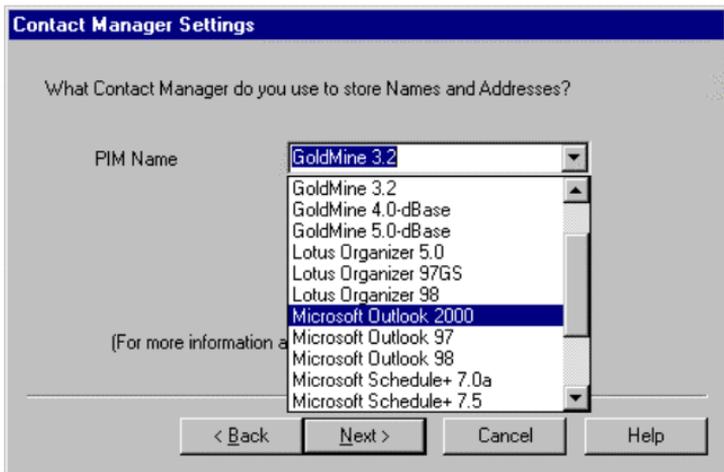
Configuring your Organizer

Pressing the configure button on the PDA Setting dialog will allow you to select the COM port that your Organizer is connected to.



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.



ACT!	You must have version 3.0.6 or higher, any version of ACT! 4.0 or ACT! 2000. Lower versions do not have the required OLE interface library for CompanionLink.
GoldMine	CompanionLink will run with version 2.5a 50911 or higher, including all GoldMine version 3.0 and 3.2 releases, and all GoldMine 4.0 releases.
Lotus Organizer	CompanionLink requires the .OR4 format file which was introduced with Organizer 97gs and the more recent 4.1 release. CompanionLink version 1.1 and higher will support Organizer 5.0 .OR5 format files.
Outlook 97/98/2000	All versions of Outlook are fully supported.
Schedule+	CompanionLink runs with Schedule+ version 7.0a.

Other contact managers will be added, so your list may include new options. For a complete list of supported products, visit www.companionlink.com.

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

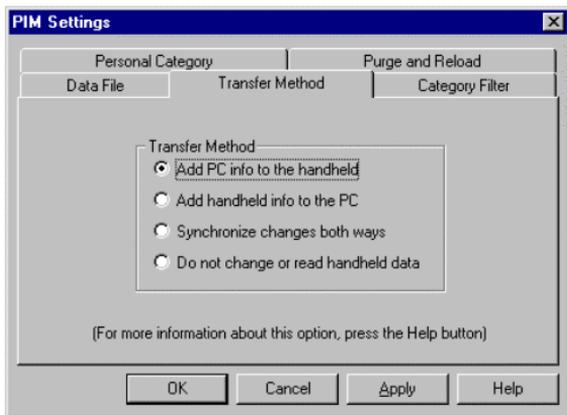
The final screen of the initial setup allows you to select your initial transfer method. This is the method that controls how data is moved during the CompanionLink Process.

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

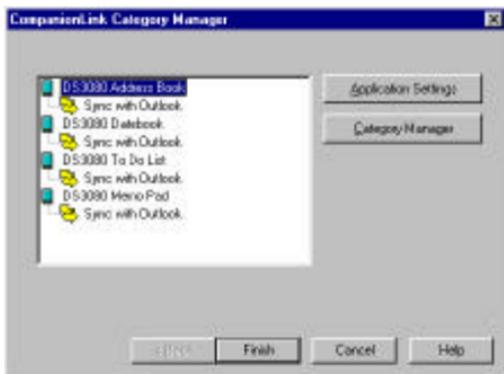
For most organizers, CompanionLink moves data from the handheld to the PC contact manager, making the PC contact manager the "Master" database, then moves items to the handheld organizer. Data will be added to both the handheld and the PC contact manager.

Do not change Or read handheld data

This selection turns off all processing for this file.

Category Manager for CompanionLink Express

With CompanionLink your category manager options are limited to the single contact manager. 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, like **Date Book** 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.

NOTES



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