

Maximizer Link 7

For the Palm OS



Quick Reference Guide

*multiactive.*TM

This is a Quick Reference Guide Only.

Please refer to online documentation located in the folder where you installed Maximizer Link for more detailed information.

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This document applies to Maximizer Enterprise/Maximizer 7/7.5 and Maximizer Link 7/7.5 software.

Maximizer Link 7

For the Palm OS

INTRODUCING Maximizer Link

Maximizer, the Palm OS, and Maximizer Link are a powerful suite of tools offering you all client management features of Maximizer, while taking advantage of the portability and convenience of the Palm handheld organizer. Whether at work or on the road, you always have access to current information about your clients or customers—names, addresses, appointments, tasks, and notes. Simply use Maximizer Link to synchronize record additions, changes, and deletions between the two products. When you synchronize data regularly, performance is better because only records that have been modified are read during the process.

You can transfer the following types of records between PC Maximizer and the PalmPilot.

Maximizer Records

Companies, Individuals & Contacts

Appointments (Calendar)

Tasks (Hotlist)

Notes, Journal

Basic Information tab fields,
table fields and alphanumeric fields

PalmPilot Records

Address Book

Date Book

To Do List

Memo Pad & Notes

Custom Fields

Maximizer Link works with both Maximizer and Maximizer Enterprise. Throughout this guide we refer to Maximizer and Maximizer Enterprise as Maximizer.

USING Maximizer Link

Maximizer Link is an application specifically designed for synchronizing with your Palm or Handspring organizer. Because these organizers do not have the storage and memory capacity of a desktop PC, we recommend that you load only your most often used Address Book records rather than entire, large Address Books folders from your PC Maximizer.

INSTALLING Maximizer Link

Follow these instructions to install Maximizer Link on Windows 95 or 98, Windows 2000, Windows XP, or Windows NT 4.0 Workstation.

1. Insert the *Maximizer Link* CD in your computer's CD-ROM drive. If you have downloaded Maximizer Link from the Multiactive website, browse to the location of the setup files.
2. When using a Maximizer Link CD, if the *Maximizer Link* setup screen does not appear automatically, select Run from the Start menu. Type d:\setup.exe or (where d: is the letter of your CD-ROM drive), or click the Browse button to locate the file on your CD-ROM drive. Then click OK. If you've downloaded the setup files, double-click the setup.exe.
3. Follow the instructions displayed in the setup program windows.

For more information about Maximizer Link, please refer to the online User's Guide included on this CD. This guide also includes user tutorials to get you started.

SYNCHRONIZING Your Data for the First Time

The first time you synchronize records, complete these three steps:

Step 1: Selecting Address Book records

Start *Maximizer* and choose the records you want to synchronize. Then open the Maximizer Link Configuration program from Maximizer or the Windows Start menu (Programs > Maximizer > Maximizer Link > Maximizer Configuration). In Maximizer Link, specify the *Maximizer* Address Book entries and Contacts that are to be included in the synchronization.

Step 2: Setting Synchronization Methods

Specify how your records should be synchronized. For example, you may include appointment records in the synchronization, or you may choose to exclude appointment records. In addition, you can specify other options such as a date range to include only those appointments that fall within a specific time period.

Step 3: Synchronizing Your Maximizer and Palm Records

Finally, connect your Palm or Handspring to your computer (either locally using the Palm serial cable or remotely by modem) and initiate the Palm HotSync process to synchronize records.

SETTING Synchronization Options

Before you synchronize records between PC Maximizer and your Pilot, decide how the records are to be synchronized. Your choices are:

Synchronize Maximizer and Palm/Handspring Data

Synchronizes records based on Maximizer Link typical synchronization.

Overwrite Palm/Handspring Data with Maximizer Data

Overwrites Palm/Handspring Data with data in current Maximizer Address Book.

Revert All Palm/Handspring Data to Your Previous Synchronization

Depending on what the synchronization circumstances, this options does one of two things:

With typical synchronization circumstances, this option undoes all changes to the Palm since your last synchronization. The data is reverted to the state after your previous synchronization.

– or –

When communications have been interrupted during a synchronization for such reasons as a connection failure, this option resends synchronized data to the Palm. During a synchronization, Maximizer Link saves data to be sent to the Palm on your PC's hard disk. If communications are interrupted, this option does erase changes to the Palm, but resends the saved data to complete the failed synchronization.

Add All Archives to Palm/Handspring

Restores all deleted Palm records that have been archived on your PC. The records are added as “unfiled” entries.

If you recently had problems with a synchronization and received a message from Maximizer Link recommending the “Revert all Palm data...” option, you will not lose changes since your last successful synchronization. In this case, the “Revert” option returns your data to the state before the failed synchronization.

Don't Synchronize

Doesn't synchronize information. This option is applicable to only calendar, hotlist, and notes information.

MINIMUM System Requirements

Before you begin, review the following list. It describes the hardware and software you need to run Maximizer Link:

- ♦ 450 Mhz processor or better
- ♦ Windows 95/98, Windows XP, Windows 2000 or Windows NT
- ♦ A CD-ROM drive and an available serial port
- ♦ Maximizer Enterprise 7/7.5 or Maximizer 7 installed on your computer.
- ♦ PalmPilot Desktop application version 4.0 or higher installed on your computer.

Be sure to back up your Maximizer Address Books before using Maximizer Link.

For information about the installation, setup and operation of your PalmPilot, refer to the documentation supplied with it.

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Website: www.multiactive.com

Online Knowledge Base: www.multiactive.com/support/

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