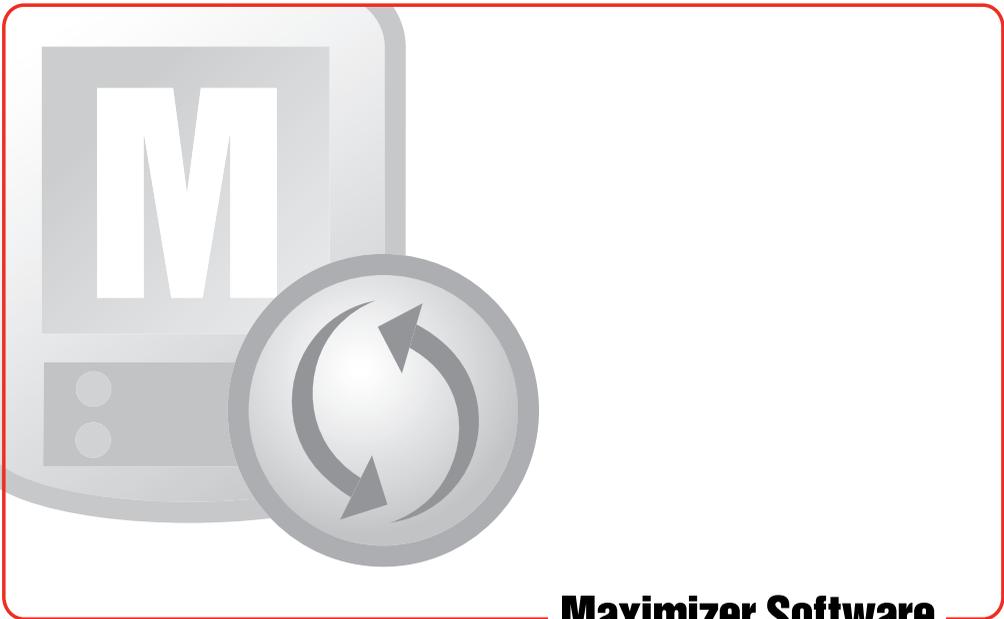




Maximizer CRM™ 10
MaxLink *for Palm® OS*

User's Guide



Maximizer Software
Simply Successful **CRM**

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Applicability

This document applies to MaxLink 10 for Palm OS software.

Maximizer Software Address Information

Corporate Headquarters Americas

Maximizer Software Inc.
1090 West Pender Street – 10th Floor
Vancouver, BC, Canada V6E 2N7
+1 604 601 8000 phone
+1 604 601 8001 fax
+1 888 745 4645 support
info@maximizer.com
www.maximizer.com
Knowledge Base: www.maximizer.com/knowledgebase

Europe, Middle East, and Africa

Maximizer Software Ltd
Apex House, London Road
Bracknell, Berkshire
RG12 2XH United Kingdom
info@maximizer.co.uk
www.maximizer.co.uk

Asia

Maximizer Asia Limited
17/F, Regent Centre
88 Queen's Road
Central, Hong Kong
+(852) 2598 2888 phone
+(852) 2598 2000 fax
info@maximizer.com.hk
www.maximizer.com.hk

Australia

Maximizer Software Solutions Pty. Ltd.
Level 10, 815 Pacific Highway
Chatswood, New South Wales
Australia, 2067
+61 (0)2 9957 2011 phone
+61 (0)2 9957 2711 fax
info@maximizer.com.au
www.maximizer.com.au

Contents

Chapter 1	Introducing MaxLink	1
	Synchronizing Your Data for the First Time.....	3
	Step 1: Selecting Address Book records.....	3
	Step 2: Setting Synchronization Methods	3
	Step 3: Synchronizing Your Maximizer and Palm Records	3
Chapter 2	Getting Started	5
	System Requirements.....	6
	Installing MaxLink	6
	Getting Help	6
Chapter 3	Setting MaxLink Options.....	7
	Synchronize Maximizer and Palm/Handspring Data.....	8
	Overwrite Palm/Handspring Data with Maximizer Data	8
	Revert All Palm/Handspring Data to Your Previous Synchronization .	8
	Add All Archived Records to Palm/Handspring	8
	Don't Synchronize	8
	Select Records Tab	9
	Synchronization Methods Tab	10
	Custom Fields Tab.....	11
	Phone Tab	12
	Date Range Tab	13
	Select Date Range Type	13
	Synchronize Records	13
	Fixed Date Range	14
	Other Options Tab (Notes).....	15
	Category and Address Book Tab (Global Settings).....	16
	Palm/Handspring Categories	16
	Include Personal Records	16
	Selecting Categories	17
	Settings Tab (Global Settings).....	18
	Delete Address Book Entries When Corresponding Palm/Handspring Items are Deleted.....	18
	Turn on Alarms After Synchronization	18
	Add Address Book Entry or Contact Name to the Palm/Handspring Date, To Do and Memo Records.....	18

Add All Address Book Entries Containing Appointments or Hotlist
Tasks to the Selected List 19
Remove PC Archives After Next Synchronization..... 19
Revert to the "Synchronize Maximizer and Palm/Handspring Data"
Synchronization Method After Next Synchronization..... 19

Chapter 4 **Linking Palm and Maximizer Records21**
Link Keys 22
 System Keys 22
 User Keys..... 22
 Example of a System Key 23
 Example of a User Key 23
Adding Companies, Individuals, and Contacts Destined for Maximizer ..24
Adding Date Book, To Do List, and Memo Pad Records Destined for
Maximizer 25
Adding Alternate Addresses Destined for Maximizer..... 26
Updating Records 26
Deleting Records 27

Chapter 5 **Reference.....29**
Field Mapping..... 30
Address Mapping 32
Palm or Handspring Recurring Events..... 32

Chapter 6 **Tutorial33**
Exercise 1 - Entering a New Company and Contacts 35
Exercise 2 - Adding a New Contact for an Existing Company..... 38

Chapter 7 **MaxLink Messages41**

CHAPTER

Introducing MaxLink 1

In this chapter...

“Synchronizing Your Data for the First Time” on page 3

Maximizer and MaxLink for Palm OS form a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of the Palm OS device. 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 MaxLink to synchronize record additions, changes, and deletions between the two products. When data is synchronized regularly, performance speed is optimal because only records that have been modified are read during the process.

You can synchronize the following types of records between Maximizer and your mobile device:

Maximizer entries	Palm/Handspring records
Address Book entries and Contacts	Address Book
Appointments (Calendar)	Date Book
Tasks (Hotlist)	To Do List
Notes	Memo Pad and Notes in the Address Book, Date Book, and To Do List
Basic Information tab fields, table fields and alphanumeric fields	Custom Fields

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 MaxLink Configuration program from the Windows Start menu (Programs > Maximizer > MaxLink > Maximizer Configuration). In MaxLink, 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 to your computer (either locally using the Palm serial cable or remotely by modem) and initiate the Palm HotSync process to synchronize records.

CHAPTER **Getting Started** 2

In this chapter...

“System Requirements” on page 6

“Installing MaxLink” on page 6

“Getting Help” on page 6

This chapter describes how to install MaxLink. These instructions presume that you already have a computer set up with the Maximizer software and the necessary peripheral devices. You must also have a 3Com Palm or Handspring organizer and the Palm software installed on your computer.

System Requirements

Before you begin, review the following system requirements for MaxLink.

- 600 MHz processor or higher
- Windows XP, 2000, 2003
- Maximizer CRM 10 installed on your computer
- Palm Desktop application version 4.0 or higher installed on your computer

 Visit our website at www.maximizer.com for the most up-to-date product compatibility information.

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

Installing MaxLink

 **Note:** Be sure to back up your Maximizer Address Book before you run MaxLink. For information about the installation, setup, and operation of your Palm or Handspring, refer to the documentation supplied with it.

Follow these instructions to install MaxLink.

► To install MaxLink

- 1** Insert the MaxLink CD in your computer's CD-ROM drive.
If you have downloaded MaxLink from the Maximizer website, browse to the location of the setup files.
- 2** When using a MaxLink CD, if the setup screen does not appear automatically, double-click the Autorun.exe.
If you've downloaded the setup files, double-click the setup.exe.
- 3** Follow the on-screen instructions to complete the installation.

Getting Help

For information on each of the tabs in MaxLink, press F1 while the tab is active. If the Help does not first appear, try clicking directly on the tab name in MaxLink and pressing F1 again.

CHAPTER 3 Setting MaxLink Options

In this chapter...

“Select Records Tab” on page 9

“Synchronization Methods Tab” on page 10

“Custom Fields Tab” on page 11

“Phone Tab” on page 12

“Date Range Tab” on page 13

“Other Options Tab (Notes)” on page 15

“Category and Address Book Tab (Global Settings)” on page 16

“Settings Tab (Global Settings)” on page 18

i Before starting MaxLink to synchronize or overwrite, first use Maximizer to identify the specific Address Book entries to include. For more information, see "Linking Palm and Maximizer Records" on page 21.

Before you synchronize records between Maximizer and the Palm or Handspring, you must choose a synchronization method.

MaxLink provides the following ways to synchronize records:

Synchronize Maximizer and Palm/Handspring Data

Synchronizes records based on MaxLink typical synchronization.

Overwrite Palm/Handspring Data with Maximizer Data

Overwrites Palm/Handspring Data with data in current 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.
- 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, MaxLink 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 Archived Records 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 MaxLink 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

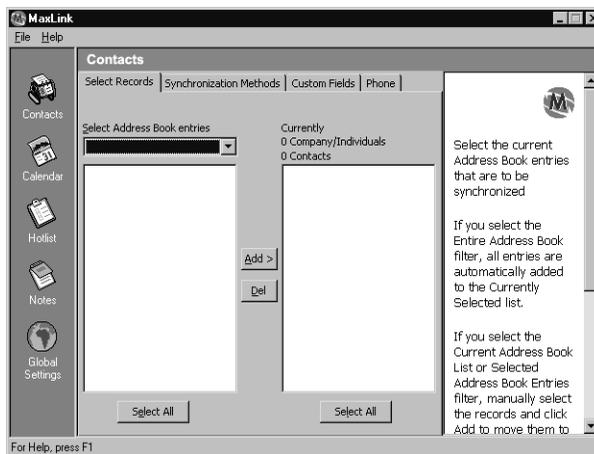
Doesn't synchronize information. This option is applicable to only calendar, hotlist, and notes information.

Select Records Tab

When you first open MaxLink, the Select Records tab appears. This tab allows you to select records from your Address Book entries (Contacts), Calendar, Hotlist, and Notes. Choose the associated icon to select records for each of the categories.

If you use the Entire Address Book option, all entries are automatically added to the Currently Selected list for synchronization. This list is dynamically updated.

When using the Current Address Book List or Selected Address Book Entries options, you must manually select the records and move them to the Currently Selected list. To refresh a list, choose the option again after making the list or your selected entries current.



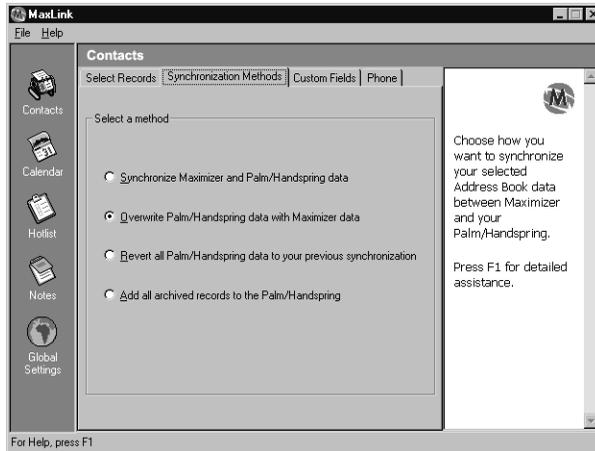
The Select Address Book Entries pane allows you to choose a filter based on what records you would like to synchronize.

You can further your Address Book records shown in this pane by selecting only certain records and clicking the Add button. Or, to synchronize all records based on what was retrieved using the Address Book filter, click the Select All button and then click Add.

The Currently Selected pane displays all records that have been selected for synchronization. If you've previously synchronized, the last selections appear in this list. Select the records and click the Delete (Del) button to remove the records. You can then choose the appropriate records for the next synchronization.

Synchronization Methods Tab

This tab allows you to set a synchronization method for your Address Book entries (Contacts), Calendar, Hotlist, and Notes. Choose the associated icon to set the synchronization method for each of the categories.



The following table shows how the records on each side are affected by a particular action. For example, the first row in the table indicates that if you add a record to the Palm or Handspring and there is no corresponding record in Maximizer, then MaxLink adds the Palm record to Maximizer.

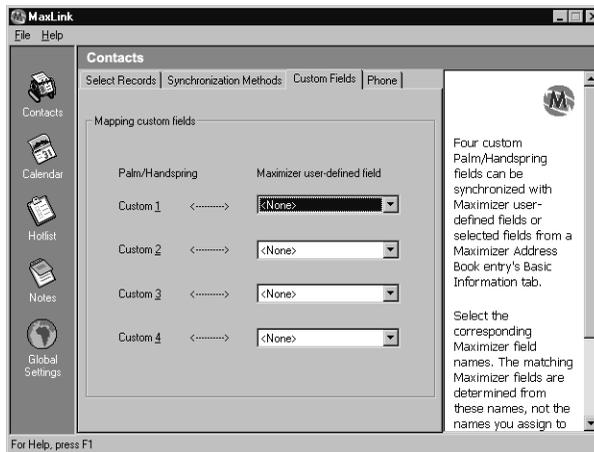
Maximizer Records	Palm Records
Address Book entries and Contacts	Address Book
Appointments (Calendar)	Date Book
Tasks (Hotlist)	To Do List
Notes	Memo Pad and Notes in the Address Book, Date Book, and To Do List
Basic Information tab fields, table fields and alphanumeric fields	Custom Fields

Custom Fields Tab

The four custom fields from Palm are synchronized with Maximizer user-defined fields or selected fields from a Maximizer Address Book entry's Basic Information tab. You select the corresponding names for these Maximizer fields. Please note that the names of the matching Maximizer fields will be determined only from the names entered in this dialog box regardless of the names you assign to the custom fields on the Palm.

The Palm/Handspring column displays the list of Palm custom fields 1 through 4.

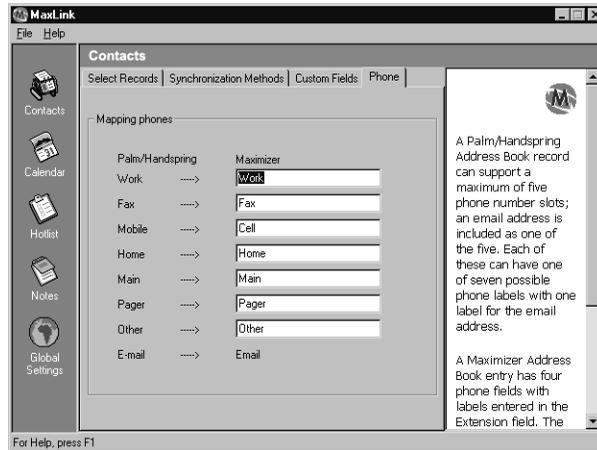
The Maximizer User-Defined Field column is where you choose one of the available user-defined fields in the current Address Book. This list does not include date types of user-defined fields—these types of fields cannot be synchronized.



The Custom type fields shown in MaxLink are available for users who have created a user-defined field with one of these names specifically for Palm/Handspring synchronization. For instance, if you create a user-defined field in Maximizer called Custom 1 and you choose it to map to Custom 1 on your PDA, this simply matches the field name exactly as shown in the Palm or Handspring device.

Phone Tab

A Palm Address Book record has maximum of 5 phone number slots (if you have an e-mail address, this is included as one of the 5), and each one of these can have one of 7 possible phone labels and 1 label for e-mail address. A Maximizer Address Book entry has 4 phone fields with labels entered in the Extension field. The 5th Palm phone is automatically created as a user-defined field in Maximizer during synchronization.



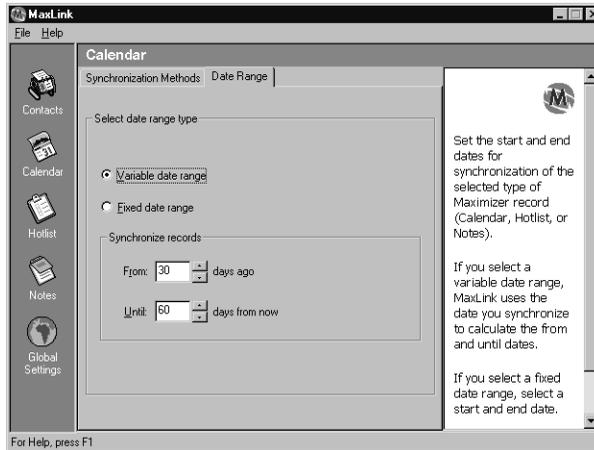
The Palm/Handspring column displays the available phone labels.

The Maximizer column is where you enter the Maximizer phone label extension to correspond with one of the five phone number labels on the Palm. This may be the same name as the label on the Palm or Handspring or a totally different name. This label appears on the Basic Information tab as the phone extension.

The E-mail → Email Address option automatically aligns the E-mail Address on the Palm or Handspring with the Email Address field in Maximizer.

Date Range Tab

On the Date Range tab, you set the start and end dates for the synchronization for the selected type of Maximizer record—Calendar, Hotlist, or Notes. Choose the associated icon to set the date range for each of the categories.



Select Date Range Type

Indicate whether you want to set a variable or fixed date range.

- To specify a variable date range, click Variable Date Range. (MaxLink uses the date you synchronize to calculate the from and until dates.)
- To specify a fixed date range, click Fixed Date Range. You then must specify a date range in the calendar section of the screen—Fixed date range section.

Synchronize Records

Specify how many days before and after the date you synchronize MaxLink should use as the date range.

- In the From field, type the number of days prior to the synchronization date. MaxLink uses this number to calculate the start date of the range.
- In the Until field, type the number of days after to the synchronization date. MaxLink uses this number to calculate the end date of the range.

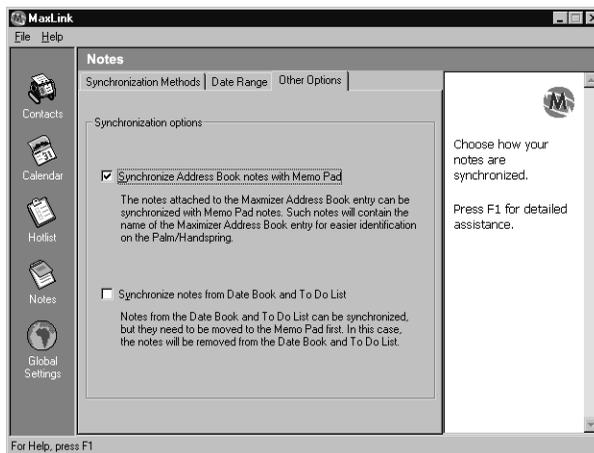
Fixed Date Range

Specify the start and end date of the fixed date range. Use the month drop-down list and the year arrow keys to set the year and month, then click on a day in the calendar to specify a particular day. Be sure to update this range or return to the Variable date range before your next synchronization, or the same date range will be used again.

Other Options Tab (Notes)

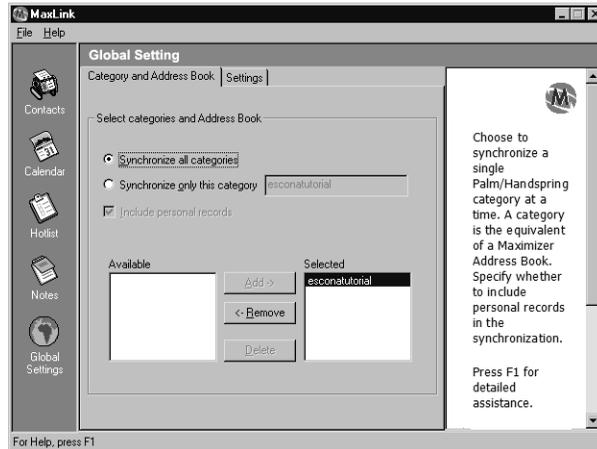
If you select the “Synchronize Maximizer Address Book entry notes with Palm Memo Pad” option, all notes that are not designated as the Palm note [[pp]] are synchronized with the Memo Pad.

If you prefer to leave your notes in the Palm Date Book and To Do list as they are, do not select the “Synchronize notes from Palm Date Book and To Do List records” option. If you select this option, the notes will be synchronized and will be available only on the Palm. Notes are transferred from the Date Book and To Do List to the Memo Pad where they will be synchronized with the associated Maximizer Address Book entry.



Category and Address Book Tab (Global Settings)

You can synchronize a single Palm/Handspring category (Address Book in Maximizer) at a time.



Palm/Handspring Categories

Choose either to synchronize all Palm/Handspring categories or only selected categories.

Option	Action
Synchronize all Palm/Handspring records	Synchronizes all existing Palm/ Handspring categories.
Synchronize only the selected categories	Synchronizes only the selected categories based on the list in the lower pane of the tab

Include Personal Records

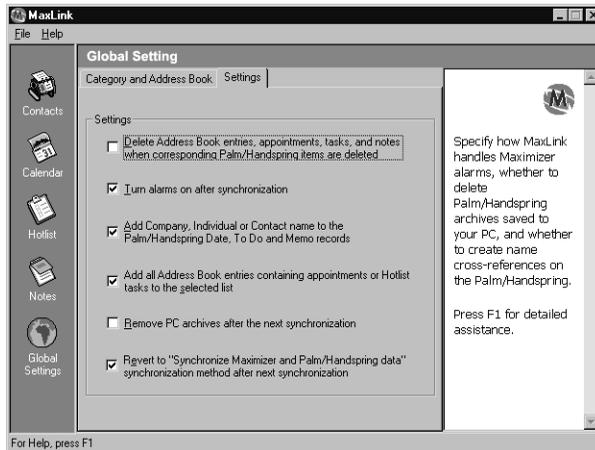
Selecting this option includes Maximizer personal records in the synchronization.

Selecting Categories

Use the Add, Remove, and Delete buttons to add and remove categories from the selection list.

Settings Tab (Global Settings)

Lets you set how MaxLink handles Maximizer alarms, whether to delete Palm archives saved to your PC, and whether to create name cross-references on the Palm.



Delete Address Book Entries When Corresponding Palm/Handspring Items are Deleted

Deletes Address Book entries during synchronization if the entries have been deleted on the PDA.

Turn on Alarms After Synchronization

MaxLink deactivates Maximizer alarms (such as appointment warnings and meeting notifications) to prevent synchronization from being interrupted. If you want your Maximizer alarms turned on again after each synchronization, select this checkbox.

Add Address Book Entry or Contact Name to the Palm/Handspring Date, To Do and Memo Records

Select this checkbox to have MaxLink automatically insert the name of the associated Address Book entry or Contact, in square brackets, into Palm Date Book, To Do List, and Memo Pad records. This setting helps you identify the appropriate person or company when reading appointments, tasks, and notes on the Palm.

Add All Address Book Entries Containing Appointments or Hotlist Tasks to the Selected List

This option ensures that all data types will be synchronized. When the box is checked, if you select Hotlist tasks or appointments in Maximizer, but do not select the appropriate Address Book entry or Contact as well, then MaxLink will add the Address Book entry or Contact to the Synchronization List automatically.

If you leave the box unchecked, tasks and appointments you have selected without also selecting the appropriate Address Book entry will become personal tasks and appointments when synchronized.

Remove PC Archives After Next Synchronization

When you delete a record on the Palm, you are asked whether to archive the record on your PC. If you choose to archive a record, it is stored on your PC in an archive file. It is stored in the Palm folder, under a sub-folder with your user name, inside another folder with the name of the Palm application concerned.

Revert to the "Synchronize Maximizer and Palm/Handspring Data" Synchronization Method After Next Synchronization

Sets the corresponding synchronization option after the next synchronization.

CHAPTER 4 Linking Palm and Maximizer Records

In this chapter...

“Link Keys” on page 22

“Adding Companies, Individuals, and Contacts Destined for Maximizer” on page 24

“Adding Date Book, To Do List, and Memo Pad Records Destined for Maximizer” on page 25

“Adding Alternate Addresses Destined for Maximizer” on page 26

“Updating Records” on page 26

“Deleting Records” on page 27

Records are related differently in Maximizer than in the Palm software. Maximizer entries are linked by relating Address Book entries (Companies and Individuals) to their Contacts, and linking each Address Book entry or Contact with its associated notes, appointments and Hotlist tasks. Palm records are independent, with no links among Address Book, Date Book, To Do List, and Memo Pad records. The following sections describe how Maximizer and Palm records are linked during synchronization.

Link Keys

MaxLink uses two special codes, called Link Keys, to establish relationships among Palm records. These are used to detect changes you make to Palm records and also to synchronize those changes with the original Maximizer entries. The Link Keys are made up of two different types of information: System Keys and User Keys. Information in both Key types are contained in angle brackets — << >> — that distinguish it from other information. The purpose and contents of each type of Key are different:

System Keys

System Keys establish relationships among various records on the Palm. MaxLink handles these Keys automatically, and you **should not** modify them. You do not need to understand how they work, but you can recognize them by their format: <<x/y/z/q>>, where x,y,z and q are numbers. Respectively these represent: Client ID (x), Contact # (y), Machine ID(z) and Sequence # (q).

User Keys

User keys distinguish information that you enter on the Palm when synchronizing data with Maximizer. When you enter a User Key, you may use any unique number or combination of characters within a set of angle brackets to represent the record. For example, <<5>> or <<user_key>> represent a number or character string that you define for a specific Address Book entry. After Address Book records are entered on the Palm and then synchronized, they become typical entries in that they appear no differently from a record that has been entered in Maximizer. The tutorial exercises in this guide provide you with step-by-step instructions on entering various types of User Keys: Companies, Individuals, Contacts, Appointments, Hotlist Tasks, and Notes.

Example of a System Key

Warning: Never modify a System Key. If you do, you may lose data and also risk losing the relationships among Palm records.

During synchronization, MaxLink marks each record it transfers to the Palm with a System Key. Here is an example:

<<94030200071329828C/5/1571329828/51>>

This key is stored in the following locations on the Palm.

Palm Record Type	System Key Location
Address Book	Custom 4 field
Date Book	Note field, within the text
To Do List	Note field, within the next
Memo Pad	appended to the end of the Memo text

Example of a User Key

You create and add the User Key to your Palm records. It is important to understand how to create and enter these keys to ensure that your Palm records are transferred to Maximizer properly.

There are two types of User Keys:

- The first is for records associated with Address Book entries. For example:
 - <<3>> where 3 is a unique Client ID
 - <<Acme>> where Acme is a unique Client ID
 - <<ATM4>> where ATM4 is a unique Client ID
- The second is for records associated with Contacts. For example:
 - <<3/1>> where 3 is the associated Client ID and 1 is a unique Contact ID
 - <<Acme/3>> where Acme is the Client ID and 3 is a unique Contact ID
 - <<ATM4/John>> where ATM4 is the Client ID and John is a unique Contact ID

Add this key in the following fields on the Palm.

Palm Record Type	User Key Location
Address Book	Custom 3 field
Date Book	Note field

Palm Record Type	User Key Location
To Do List	Note field
Memo Pad	appended to the end of the Memo text

Adding Companies, Individuals, and Contacts Destined for Maximizer

When you add new records to the Palm Address Book, you must assign each record a key so that it can be linked correctly to Date Book, To Do, and Memo Pad records.

Add User Keys anywhere in the Custom 3 field to ensure that secondary records such as appointments are associated with the correct Address Book entry or Contact when they are transferred to Maximizer during a synchronization.

Creating new Address Book records so they become Contacts in Maximizer is similar to marking Address Book entry records, but you must make sure that the Contact is associated with the correct Address Book entry. Do this by creating a User Key with the proper Client ID and a new Contact ID.

► To make a new Address Book record an Address Book entry

- 1 Add the Palm Address Book record. To make an Address Book entry, leave the First and Last Name fields blank.
- 2 If you need to link the Address Book entry to other records, such as an appointment, type a User Key in Custom 3 using a unique value, such as <<1>>, <<Acme>>, or <<ATM65>>.

► **To make a new Address Book record a Contact**

- 1** Add the Palm Address Book record for the Contact. If you leave particular fields blank, MaxLink fills them with information from the associated Address Book entry when the record is transferred to Maximizer.
- 2** Type a User Key in Custom 3 with the correct Client ID and a unique Contact ID, separated by a slash, such as <<1/1>>, <<Acme/2>>, <<Acme/John>>, <<ATM65/Mary>>, or <<ATM65/George8>> where the first value is the Client ID of the Address Book entry with which you want to associate this record, and the second is the new, unique Contact ID for this record.
 - The first value is the Client ID. It must match the value you assigned to the Address Book entry you are associating with this Contact. If the Address Book entry doesn't exist, you must add an Address Book record for it first, as described above.
 - After the slash, add a new value for the Contact. The second value needs only to be unique to that Contact, and can be a number, a short sequence of letters, or a combination.

Adding Date Book, To Do List, and Memo Pad Records Destined for Maximizer

i Remember to enclose all User Keys with double angle brackets — << >> — to distinguish them from data to be synchronized.

In the Palm or Handspring Date Book, To Do List, and Memo Pad, there is no custom field for the User Keys, so you enter them with other text:

To add a record to ...	Type the User Key in ...
Date Book	Notes; anywhere in the field
To Do List	Notes; anywhere in the field
Memo Pad	Memo; anywhere in the field

Adding Alternate Addresses Destined for Maximizer

When you update the address of a Contact record on the Palm or Handspring (not an Address Book entry, which is treated differently), it becomes an alternate address for the associated Address Book entry when the record is transferred to Maximizer. This address is labeled 'Palm or Handspring'.

Updating Records

Any updates you make to records on the Palm or Handspring are copied when you synchronize the records. For example, if you modify an address on the Palm or Handspring, the update appears in Maximizer the next time you synchronize records, provided that the Link Keys are present and correct.

Any Palm or Handspring Address Book records without Link Keys (or with keys that are incorrect or improperly formatted) are treated as new Address Book entries when synchronized with Maximizer, depending on whether or not they contain first or last name information.

Palm or Handspring Date Book, To Do List, and Memo Pad records without Link Keys (or with keys that are incorrect or improperly formatted) are treated as new personal appointments, and Hotlist tasks in Maximizer. This occurs because the record's relationship to an Address Book entry cannot be determined.

After synchronization occurs, any User Keys that you defined are deleted and the records are updated with MaxLink System Keys. You can then use the same numbers or letters for new User Keys if you wish.

Deleting Records

To prevent accidental deletion of Maximizer entries, ensure that the “Delete Address Book Entries When Corresponding Palm or Handspring Items Are Deleted” option in the Global Settings > Settings tab is clear when you configure MaxLink. Clearing this checkbox ensures that no Maximizer entries are deleted by MaxLink.

For example, if you delete an address from the Address Book, the associated Address Book entry or Contact and its associated records are deleted from Maximizer the next time you synchronize records. If you delete Memo Pad, To Do List, or Date Book appointments, only the corresponding notes, Hotlist tasks, and appointments are deleted in Maximizer.

CHAPTER Reference 5

In this chapter...

“Field Mapping” on page 30

“Address Mapping” on page 32

“Palm or Handspring Recurring Events” on page 32

Field Mapping

The following table illustrates how MaxLink maps fields between Maximizer and the Palm or Handspring when synchronizing records.

Palm or Handspring	Maximizer	Comment
Address Book	Companies, Individuals, Contacts, and Addresses	
Last Name	Last Name	
First Name	First Name	
Title	Position	
Company	Address Book entry	
Phone 1-4	Phone 1-4, UDF	See "Custom Fields Tab" on page 11 and "Phone Tab" on page 12.
Phone Labels	Phone Extensions	See "Custom Fields Tab" on page 11 and "Phone Tab" on page 12.
Phone number 5	Detail field	See "Custom Fields Tab" on page 11 and "Phone Tab" on page 12.
Address	Address 1-2	See "Address Mapping" on page 32.
City	City	
State	State/Province	
Zip	Zip/Postal	
Country	Country	
Custom Fields 1 and 2	Detail field or fields from a Address Book entry Basic Information tab	

Palm or Handspring	Maximizer	Comment
Custom Field 3	Detail field or fields from an Address Book entry Basic Information tab	Also contains 'User Key'
Custom Field 4	Detail field or fields from an Address Book entry Basic Information tab	Also contains 'System Key'

Palm or Handspring	Maximizer
Date Book	Calendar (Appointments)
Date and Time	Date, From, Until
Description	Activity
Alarm	Set alarm
Minutes/Hours/Days before	Minutes/Hours/Days/Weeks prior to appointment
Note	Notes
Repeat	no corresponding field

To Do List	Hotlist (Tasks)
To Do	Activity
Priority	Priority
Due Date	Date
Complete	Task is Completed
Note	Notes

Memo Pad	Notes
Memo text	Notes if Link Key is included.
Private	Private

Address Mapping

Palm or Handspring has one long address field; Maximizer has two shorter address fields. MaxLink uses the following rules when synchronizing the two formats:

- When an address is transferred from Maximizer to the Palm or Handspring and there are two address fields in Maximizer, the two fields are combined into one with an ampersand (&) separating the address lines.
- When an address is transferred from the Palm or Handspring to Maximizer and the Palm or Handspring address field contains too many characters for one Maximizer address field, the address is split and continued in the second Maximizer address field. If the Palm or Handspring address is longer than the two Maximizer address fields, the remaining characters are deleted. (If this address is later transferred back to the Palm or Handspring, the truncated address remains truncated and the two fields are combined into one field with an ampersand (&) separating the two address lines

Palm or Handspring Recurring Events

Maximizer and the Palm or Handspring handle recurring events differently. If possible, avoid creating recurring events in the Palm or Handspring.

 Palm or Handspring recurring events remain as such on the Palm or Handspring, but are not translated automatically into Maximizer recurring appointments during synchronization; they are added as a single appointment with the same date and time as the first recurring event.

If you do add recurring events on your Palm or Handspring but select them for synchronization, the records are stored in Maximizer as a single appointment with the same date and time as the first recurring event on the Palm or Handspring.

In addition, MaxLink:

- Adds a special indicator, [[Palm or Handspring Recurring]], at the beginning of the Description of the Maximizer Appointment.
- Adds an entry in the Note Log describing the recurring event.

You can then change the appointment to Maximizer recurring appointments and delete the corresponding Palm or Handspring recurring event.

CHAPTER **Tutorial** 6

In this chapter...

“Exercise 1 - Entering a New Company and Contacts” on page 35

“Exercise 2 - Adding a New Contact for an Existing Company” on page 38

? For more information about how MaxLinks Address Book entries, appointments, Hotlist tasks and notes, please see your Maximizer online Help for details.

Follow this MaxLink Tutorial to learn how to add records to your Palm or Handspring and synchronize them with Maximizer.

In Maximizer, you can add Contacts to an Address Book entry, and then add appointments, Hotlist tasks, and notes to Address Book entries and Contacts. To link records together on the Palm or Handspring as they are in Maximizer, two types of Link Keys are required in each Palm or Handspring record: the System Key and the User Key.

The System Key is generated by MaxLink and should **never** be modified. You create the User Key and it is erased during each synchronization.

This tutorial contains two exercises to teach you how to use these Link Keys.

Exercise 1 - Entering a New Company and Contacts

In this exercise, you will add one Company, two Contacts, and several appointments, Hotlist tasks, and notes on the Palm or Handspring, and synchronize with Maximizer.

➤ Add a Company to the Palm or Handspring.

- Create a new Address Book record and fill in fields as you wish, except:
 - Do not enter any text in the First or Last Name fields. Leave them blank.
 - In the Company field, type New Technology.
 - In Custom field 3, type <<5>>.

i You should not perform a synchronization until step 11 of this tutorial. Otherwise, the client <<5>> will be removed from the Custom 3 field and any new Contacts, Appointments, Hotlist Tasks or Notes you add after synchronization will not be attached to this particular client.

➤ Add a Contact for the New Technology Company.

- Create a new Address Book record. Fill in fields as you wish, except:
 - In the Last name field, type Smith.
 - In the First name field, type John.
 - In the Custom 3 field, type <<5/J S>>.

After synchronization, John Smith becomes a Contact of New Technology. The Contact key you assigned (J S) can be any phrase or number that is not currently associated with Client 5.

➤ Add another Contact for New Technology.

- Create a new Address Book record. Fill in fields as you wish, except:
 - In the Last name field, type White.
 - In the First name field, type Tom.
 - In the Custom 3 field, type <<5/63>>.

After synchronization, Tom White becomes another Contact of New Technology. Again, the Contact number you assign (63) can be any number except the number of another Contact of this Company.

➤ **Add an appointment for New Technology.**

- Create a new Date Book record. Fill in fields as you wish.
 - In the Note field, type <<5>>.

(In all Palm or Handspring applications, the angle brackets – << >> – are required so that MaxLink can distinguish Link Keys from other information.)

After synchronization, this appointment becomes an appointment for New Technology because you gave it the same User Key as the New Technology Address Book record.

➤ **Add an appointment for John Smith.**

- Create a new Date Book record. Fill in fields as you wish.
 - In the Note field, type <<5/J S>>.

After synchronization, this appointment becomes an appointment for John Smith of New Technology because you gave it the same User Key as the John Smith Address Book record.

➤ **Add a Hotlist task for New Technology**

- Create a new To Do List record. Fill in fields as you wish.
 - In the Note field, type <<5>>.

After synchronization, this Hotlist task becomes a Hotlist task for New Technology because you gave it the same User Key as the New Technology Address Book record.

➤ **Add a Hotlist task for Tom White**

- Create a new To Do List record. Fill in fields as you wish.
 - In the Note field, type <<5/63>>.

After synchronization, this Hotlist task will become a Hotlist task for Tom White of New Technology because you gave it the same User Key as the Tom White Address Book record.

► Add a note for New Technology

- Create a new Memo Pad record. Fill in text as you wish.
 - Anywhere in the Memo text, enter <<5>>.

After synchronization, this note becomes a note for New Technology because you gave it the same User Key as the New Technology Address Book record.

► Add a note for John Smith

- Create a new Memo Pad record. Fill in text as you wish.
 - Anywhere in the Memo text, type <<5/J S>>.

After synchronization, this note will become a note for John Smith of New Technology because you gave it the same User Key as the John Smith Address Book record.

► Synchronize

1 In the MaxLink Configuration, select Synchronize Maximizer and Palm or Handspring Data for all four applications on the Synchronization Method screen.

2 As described in the Palm or Handspring manual, connect the Palm or Handspring to your computer and press the HotSync button. After synchronization, the following records are added in Maximizer from the Palm or Handspring records you just added:

- One Company: New Technology.
- Two Contacts for New Technology: John Smith and Tom White.
- One appointment for New Technology and one appointment for John Smith.
- One Hotlist task for New Technology and one Hotlist task for Tom White.
- One note for New Technology and one note for John Smith.

Exercise 2 - Adding a New Contact for an Existing Company

Now that you have completed Exercise 1, there is a 'New Technology' Company in Maximizer and there is a 'New Technology' Address Book record on the Palm or Handspring. The User Keys you entered in the Date Book, To Do List, and Memo Pad records have been replaced by System Keys. The User Key you entered in the Address Book record has been erased from the Custom 3 field and the System Key is in the Custom 4 field.

Although the User Keys were erased, the records remain linked by the System Keys. To link additional records to the Address Book record, New Technology, you must again enter User Keys before synchronizing with Maximizer.

In this exercise, you will add a new Contact and several appointments, Hotlist tasks and notes for an existing Maximizer Company on the Palm or Handspring, and synchronize with Maximizer.

➤ **Assign a User Key to the New Technology Company.**

- In the Custom 3 field of the Palm or Handspring Address Book record for New Technology, type <<New T>>.

(The words 'New T' must not currently appear in the Custom 3 field of any other Address Book record.)

➤ **Add a Contact for New Technology.**

- Create a new Address Book record. Fill in fields as you wish, except:
 - In the Last name field, type Watson.
 - In the First name field, type Michael.
 - In the Custom 3 field, type <<New T/23>>.

After synchronization, Michael Watson becomes a Contact of New Technology. The Contact ID you assigned—23—can be any number that is not currently associated with the New Technology Company.

➤ **Add an appointment for New Technology.**

- Create a new Date Book record. Fill in fields as you wish.
 - In the Note field, type <<New T>>.

After synchronization, this appointment becomes an appointment for New Technology because you gave it the same User Key as the New Technology Address Book record.

➤ **Add an appointment for Michael Watson.**

- Create a new Date Book record. Fill in fields as you wish.
 - In the Note field, type <<New T/23>>.

After synchronization, this appointment becomes an appointment for Michael Watson of New Technology because you gave it the same User Key as the Michael Watson Address Book record.

➤ **Add a Hotlist task for New Technology.**

- Create a new To Do List record. Fill in fields as you wish.
 - In the Note field, type <<New T>>.

After synchronization, this Hotlist task becomes a Hotlist task for New Technology because you gave it the same User Key as the New Technology Address Book record.

➤ **Add a Hotlist task for Michael Watson.**

- Create a new To Do List record. Fill in fields as you wish.
 - In the Note field, type <<New T/23>>.

After synchronization, this Hotlist task becomes a Hotlist task for Michael Watson of New Technology because you gave it the same User Key as the Michael Watson Address Book record.

➤ **Add a note for New Technology.**

- Create a new Memo Pad record. Fill in text as you wish.
 - Anywhere in the Memo text, type <<New T>>.

After synchronization, this note becomes a note for New Technology because you gave it the same User Key as the New Technology Address Book record.

► **Add a note for Michael Watson.**

- Create a new Memo Pad record. Fill in text as you wish.
 - Anywhere in the Memo text, type <<New T/23>>.

After synchronization, this note will become a note for Michael Watson of New Technology because you gave it the same User Key as the New Technology Address Book record.

► **Synchronize**

1 In the MaxLink Configuration select Synchronize Maximizer and Palm or Handspring Data for all four applications on the Synchronization Method screen.

2 As described in the Palm or Handspring manual, connect the Palm or Handspring to your computer and press the HotSync button. After synchronization, the following records are added to Maximizer from the Palm or Handspring records you just created:

- One additional Contact for New Technology: Michael Watson.
- One additional appointment for New Technology and one appointment for Michael Watson.
- One additional Hotlist task for New Technology and one Hotlist task for Michael Watson.
- One additional note for New Technology and one note for Michael Watson.

CHAPTER **7**
MaxLink Messages

Message #	Description	Cause
SYN1001	Insufficient disk space for MaxLink. Be sure you have at least 20 MB of free disk space.	To perform synchronization, the program requires minimum of 20 megabytes of free disk space on the hard drive where you installed MaxLink.
SYN1002	Unable to read from Palm or Handspring. Be sure Palm or Handspring sits properly on the cradle and that the cable is connected to the PC serial port.	<p>There are a few reasons why MaxLink and the HotSync Manager may be unable to read from the Palm or Handspring:</p> <ul style="list-style-type: none"> • The cable from the cradle is not attached securely to the PC serial port. • The Palm or Handspring is not placed correctly on the cradle. • Problems with the phone line or wiring connections if the Palm or Handspring and PC are connected via modem. <p>Consult the Palm or Handspring manuals for more troubleshooting tips.</p>
SYN1003	Palm or Handspring to PC link is broken. Palm or Handspring has not been updated yet—please select “Revert all Palm or Handspring data to state after last synchronization” in configuration to update Palm or Handspring.	If the communication is broken (for example, if you remove the Palm or Handspring before the synchronization is finished, or you synchronize via modem and the phone connection fails) the Palm or Handspring may not be updated completely. MaxLink must finish updating the Palm or Handspring.
SYN1004	Palm or Handspring is full during synchronization.	The Palm or Handspring memory is probably full. The Palm or Handspring 1000 can handle about 200 to 500 records, while the Palm or Handspring 5000 can handle 1,000 to 2,500 records. A Palm or Handspring with the 1 MB upgrade can store about 2,000 to 5,000 records. Palm or Handspring III can store between 5,000 to 10,000 records. (Each Address, Appointment, etc. entry is considered one record. Memo Pad records may take up more space than others.)

Message #	Description	Cause
SYN1005	<p>MaxLink could not find its configuration files. Please do the following:</p> <ol style="list-style-type: none"> 1. Start Maximizer and open Maximizer. 2. Click the MaxLink icon on the Maximizer toolbar. 3. Configure this Address Book. 	<p>Run the MaxLink configuration before synchronizing for the first time. This creates a configuration file. If the file is corrupted or you are denied access to it, you must re-create the file by running MaxLink again.</p>
SYN1006	<p>Unable to read from Maximizer Address Book. Please check the user documentation for details.</p>	<p>This message occurs when a configured and selected Address Book cannot be opened. Run the configuration with the Address Book open and try again.</p>
SYN1007	<p>Backup file missing or cannot be read.</p>	<p>Palm or Handspring records cannot be restored, since the backup file cannot be found on your PC or is damaged.</p>
SYN1008	<p>The priority in Hotlist record "description" has been mapped to a numeric value between 1 and 5, inclusive.</p>	<p>In Maximizer, you can set the priority in the Hotlist to any 3-character alphanumeric value. However, on the Palm or Handspring, the corresponding To Do record can handle only a numeric value from 1 to 5. Any Maximizer Hotlist priority not falling in this range will be mapped to a Palm or Handspring priority of 5. So if you enter a Maximizer Hotlist priority like "HIG" it is mapped to 5. If you don't set a priority in the Maximizer Hotlist, priority defaults to 1 in the Palm or Handspring To Do. The priority value in the Maximizer Hotlist is kept until you modify the priority value in the corresponding Palm or Handspring To Do record.</p>
SYN1009	<p>Phone field 5 "<phone>" for record with name "<Company or Contact name>" was overwritten by E-mail field.</p>	<p>When all 5 Palm or Handspring phones are used and none of them is e-mail, and an entry exists in the "E-mail Address" Maximizer field, the 5th phone is replaced by the e-mail address.</p>
SYN1010	<p>The '<field>' in '<Application>' record with name '<Company Name or Contact Name or first 20 character of description of Date Book, To Do or Memo>' and ID '<Database ID/Sequence# ID>' is truncated to '<value>'.</p>	<p>When transferred from Maximizer to Palm or Handspring or vice versa, fields are truncated to fit. For example, the Last Name of a Contact in Maximizer can accommodate 59 characters and the Last Name in the Palm or Handspring Address Book handles 255 characters. Only the first 59 characters of the Last Name from the Palm or Handspring are stored in Maximizer. (The ID is the Company ID and Contact number used to help to locate the record in question.)</p>

Message #	Description	Cause
SYN1011	Failed to add '<Application>' record with name '<Company Name or Contact Name or first 20 character of description of Date Book, To Do or Memo>' and ID '<Database ID/Sequence# ID>' to Maximizer.	
SYN1012	Failed to update '<Application>' record with name '<Company Name or Contact Name or first 20 character of description of Date Book, To Do or Memo>' and ID '<Database ID/Sequence# ID>' in Maximizer.	
SYN1013	Failed to delete '<Application>' record with name '<Company Name or Contact Name or first 20 character of description of Date Book, To Do or Memo>' and ID '<Database ID/Sequence# ID>' from Maximizer.	
SYN1014	'<Application>' record with name '<Company Name or Contact Name or first 20 character of description of Date Book, To Do or Memo>' and ID '<Database ID/Sequence# ID>' is not deleted from Palm or Handspring because the record has been modified in Maximizer' or 'Maximizer because the record has been modified on Palm or Handspring'.	If a Palm or Handspring record is deleted, then the record is deleted from Maximizer as well. However, if the same record is modified in Maximizer, then it is a different record altogether and must be kept. Therefore the record is not deleted in Maximizer and is re-sent to the Palm or Handspring. The same is true for a record deleted from Maximizer but modified on the Palm or Handspring; the modified record is kept and re-sent to Maximizer.

Message #	Description	Cause
SYN1015	'<Application>' record with name '<Company Name or Contact Name or first 20 character of description of Date Book, To Do or Memo>' and ID '<Database ID/Sequence# ID>' has been modified on Palm or Handspring and in Maximizer. Both changes will be preserved.	If a record is modified differently on the Palm or Handspring and in Maximizer, then both modifications were made based on out-of-date information. To highlight the problem, both records (with different modifications) are kept on the Palm or Handspring and in Maximizer. You can add a new entry if the record in question is an Maximizer Company record (in Maximizer, every Company is unique). On the Palm or Handspring, even if the record has been marked for deletion (archived or not), it is still kept.
SYN1016	Insufficient disk space for Maximizer. Be sure you have at least 5 MB of free disk space.	To perform synchronization, MaxLink requires a minimum of 5 megabytes of free disk space on your hard drive. (It must be the same hard drive where you installed Maximizer.)
SYN1017	Missing reference in registry. Please review the Messages section of the User Documentation for further instructions.	In the Windows Registry, the key "CfgPath" must exist under \HKEY_LOCAL_MACHINE\Software\Maximizer Software\Maximizer Link\CurrentVersion\Program in registry.
SYN1018	More than one e-mail phone field ("<contents of all e-mail fields>") was found for record with name "<Company or Contact name>", only the last e-mail field was kept.	Since Maximizer can synchronize only one e-mail address with Palm or Handspring phone fields only the last e-mail address was preserved in the record. If you want to synchronize multiple e-mail addresses for a record, use Palm or Handspring custom fields.
SYN1020	Failed to load a required DLL file.	Files may be missing. Reinstall MaxLink.
SYN1021	Missing Due Date in To Do List record "description" with ID "database ID/ sequence #". Assigned to the current date.	The schedule date field in Maximizer Hotlist record is mandatory but the due date field in To Do on the Palm or Handspring (which is mapped to schedule date) is not. If there is no To Do due date on the Palm or Handspring, MaxLink uses the current date as a substitute. The due date on the Palm or Handspring will be changed to the current date as well.

Message #	Description	Cause
SYN1022	Warning—Palm or Handspring recurring event(s) with name '<Company Name or Contact Name or first 20 character of description of Date Book, To Do or Memo>' and ID '<Database ID/Sequence# ID>' is detected. Please review and generate it in Maximizer instead.	
SYN1023	Address Book application must be run first. The order is determined by HotSync, the problem needs to be fixed by modifying registry entries.	
SYN1024	The record "record name" has been archived on Palm or Handspring and modified on Maximizer.	The record has been deleted and archived on Palm or Handspring and modified on Maximizer.
SYN1025	The record "company name" is not properly updated since Mr/Ms, Initial and Salutation cannot be used for company records.	These three fields are not applicable for Companies in Maximizer, and they have been used for a company record on the Palm or Handspring.
SYN1026	Note counts for "company or person name" start with "[[pp]]", only one of them is synchronized	Only one note can be attached to an address book record on the Palm or Handspring. The matching note in Maximizer starts with [[pp]], and more than one such note has been detected on Maximizer for the current address book record.
CFG2000	Maximizer Address Book is not available. Please ensure that Maximizer is running, with the Address Book window visible in list view, and that no dialog boxes are open.	Check that the Maximizer Address Book window is active—make sure that no dialog boxes are open. For example, you cannot be modifying a Company record if synchronization is to occur. If you are updating the record, the record is locked and cannot be updated by MaxLink.
CFG2001	With this option set ON, adding a Company also adds all its associated Contacts	

Message #	Description	Cause
CFG2002	With this option set OFF, Contacts are NOT added automatically when their associated Companies are added	
CFG2003	The application was not found.	A critical subfolder is missing. If you have installed Maximizer under 'c:\Maximizer' then the folder 'c:\Maximizer\pilotlnk' must exist. The 'pilotlnk' subfolder is created by the installation program by default. This message indicates that MaxLink is not properly installed. Uninstall MaxLink and reinstall it.
CFG2004	Missing reference in registry.	Several keys must exist in the Registry under '\HKEY_LOCAL_MACHINE\Software\Maximizer Software\Maximizer Link\CurrentVersion\Program' in. This message is an indication that the software is not properly installed. Please uninstall MaxLink and reinstall it.
CFG2005	User documentation can't be opened.	This can occur for the following reasons: <ul style="list-style-type: none"> • Invalid registry entry. Try reinstalling MaxLink. • File not found. The Adobe Acrobat documentation file is not in the location indicated in the Windows Registry. Try reinstalling MaxLink. • Adobe Acrobat Reader not installed. To install Adobe Acrobat Reader: <ol style="list-style-type: none"> 1. Go to the Maximizer CD and choose the Adobe Acrobat installation option. 2. Launch the Acrobat Installation Program and follow its instructions
CFG2006	<Palm or Handspring application type> configuration conflict in "<folder name>": when Palm or Handspring contents are to be restored only one folder can be selected.	When you select to restore a Palm or Handspring database contents, only one Maximizer Address Book may be selected for that Palm or Handspring application.

Message #	Description	Cause
CFG2007	Configuration conflict in "<folder name>": when an Maximizer Address Book is selected to synchronize all Palm or Handspring categories no other Maximizer Address Books may be selected.	If you select to synchronize an Maximizer Address Book with all Palm or Handspring categories, no other Address Books may be selected.
CFG2010	The file with Address Book descriptions can't be read. Make sure that Maximizer is running with no open dialogs.	Maximizer needs to be running with no dialogs open to allow access to Address Book descriptions.
CFG2011	Address Book configuration conflict in <Address Book name>: one Palm or Handspring category can be synchronized to only one Maximizer Address Book.	One Palm or Handspring category can be synchronized to only one Maximizer Address Book. Please modify configuration values so that the category is not selected for multiple Address Books.
CFG2012	Please add at least one category.	When synchronizing Maximizer Address Books with selected Palm or Handspring categories at least one category needs to be selected.