

## **Teamsoft PDA Synchronization with Microsoft Outlook**

## **Additional Information**

## Introduction

Teamsoft Technical Support recommends that you verify a few settings before synchronizing with Microsoft Outlook to avoid doubles in the agenda, contact list or task list.

## How to verify these settings?

In order to verify these settings, you need to follow the steps below:

- 1. Open the HotSync Manager by clicking on the 🕼 button in the notification area and then click "Custom..."
- 2. You will end up with the following screen.

| С | ustom                     |                       |   | ×       |
|---|---------------------------|-----------------------|---|---------|
|   | Bernard                   |                       | • |         |
|   | ,<br>Conduit              | Action                | _ |         |
|   | Memos (Outlook)           | Synchronize the files | ~ | Done    |
|   | Date Book (Outlook)       | Do Nothing            | _ |         |
|   | Address Book (Outlook)    | Do Nothing            |   | Change  |
|   | To Do List (Outlook)      | Do Nothing            |   |         |
|   | Memo Pad (Outlook)        | Do Nothing            |   | Default |
|   | Calendar (Outlook)        | Synchronize the files |   |         |
|   | Contacts (Outlook)        | Synchronize the files |   | Help    |
|   | Tasks (Outlook)           | Synchronize the files | _ |         |
|   | Install                   | Enabled               |   |         |
|   | Install Convice Templates | Enabled               |   |         |
|   |                           |                       |   |         |

3. Select the "Calendar (Outlook)" conduit, then the "Change..." button. The "Change HotSync Action" screen then appears.



| Change HotSync Action |                                       |                  |  |  |  |
|-----------------------|---------------------------------------|------------------|--|--|--|
| HotSync Set           | HotSync Settings for Outlook Calendar |                  |  |  |  |
|                       | Synchronize the files                 | Cancel           |  |  |  |
|                       |                                       | Help             |  |  |  |
|                       | C Desktop overwrites handheld         |                  |  |  |  |
| ∎⇔⊒                   | C Handheld overwrites Desktop         | ☐ Set as default |  |  |  |
|                       | C Do nothing                          | Settings         |  |  |  |
| L                     |                                       |                  |  |  |  |

4. Click on the "Settings..." button to access the conduit settings.

| Outlook Calendar Settings for Bernard   |          |  |  |  |  |
|---|----------|--|--|--|--|
| Conduit Settings  |          |  |  |  |  |
| Select the Outlook Profile and folder for this handheld user:   |          |  |  |  |  |
| Outlook Profile Outlook   | Profiles |  |  |  |  |
| Source Folder Personal Folders\Calendar   | Browse   |  |  |  |  |
| In the event a record is modified on both the desktop and handheld, select<br>the resolution for the conflict:                                |          |  |  |  |  |
| Conflict Resolution Duplicate   | <b>-</b> |  |  |  |  |
| Enable synchroniz Outlook Wins Handheld Wins Enable synchroniz Ignore Assign time zones on my Palm device for all new appointments created in |          |  |  |  |  |
| Outlook.  |          |  |  |  |  |
| OK Cano   | el Help  |  |  |  |  |

- 5. In the "Conflict Resolution" drop down list, select an option different than "Duplicate" which is selected by default, to avoid having duplicates in case of conflicts between TeamAgenda and your handheld.
- 6. Click on the OK button and you'll end up in the "Change HotSync Action" window.
- 7. Repeat steps 3 to 6 for "Contacts (Outlook)" and "Tasks (Outlook)" conduits.

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