

Synchronizing Artsystems Contacts with a PDA

USING MICROSOFT ACTIVESYNC

Artsystems has the ability to create “delimited” text (.txt) files that can be exported from Artsystems and imported into various contact related software and hardware applications such as MS Word, MS Outlook, and Palm hand-held contact organizers.

IMPORTANT: Since contact records are often updated on-the-fly in mobile devices, these records should be later updated in Artsystems then reloaded onto the mobile device so that the contact data remains consistent and synchronized.

SYNCHRONIZATION USING ACTIVESYNC

In Windows XP synchronization between a computer and a handheld smartphone or other PDA device is generally managed using Microsoft [ActiveSync](#) software. Please consult the manufacturer for other needed software that may be provided with your device.

NOTE: Microsoft ActiveSync works only with **Windows XP SP2** or earlier. If you have Windows Vista, your synchronization settings will be managed through the [Windows Mobile Device Center](#). Outlook 2000 is not supported in ActiveSync 4.5, it is recommended that customers upgrade to Outlook 2003 or later.

DOWNLOAD ACTIVESYNC 4.5

1. Go to Microsoft ActiveSync Download page found [here](#).
2. Select the language to use for Download.
3. Accept the licensing agreement (if required).
4. Select Run this program from its current location and click OK.
5. Follow the instructions on the screen.
6. Connect the mobile device to the PC by using a cable, cradle or infrared connection supplied by the manufacturer.
7. Follow ActiveSync directions to setup the partnership connection between the device and the software.

NOTE: Desktop firewall applications are designed to block network traffic and secure the desktop PC from incoming network connections. Since ActiveSync utilizes TCP ports for data transfer with Windows Mobile powered devices, you may need to explicitly allow this traffic to be un-blocked by Firewall applications. To do so, you must add ActiveSync application processes into the Firewall Programs Exception List.

EXPORTING ARTSYSTEMS CONTACTS

Once the partnership connection is established between the ActiveSync application and the mobile device, export the Artsystems contact records to add to your mobile device. For more information on exporting Artsystems contacts records please see our [Exporting Artsystems Contacts](#) document.

1. Please ensure that the mobile device contact fields correspond to Artsystems contact fields or can be mapped to the corresponding field.
2. Begin by exporting your Contact information from Artsystems to a (Tab and Enter delimiter) .txt file as described in exporting contacts and the User Guide.

IMPORTING ARTSYSTEMS CONTACTS

3. Open your PDA software program.
4. Click the application into which you want to import data (ex: Address Book or Pocket Outlook).
5. Select File from the menu and Import from the drop down.
6. Browse and choose the txt file created in *Artsystems*.
7. Click OPEN
8. To import data correctly, drag fields in the left- hand column so that they are opposite the corresponding imported field on the right- hand column.
9. Remember: If you do not want to import a field, deselect the check box for that field.
10. Click OK. The imported data is highlighted in the application.
11. To add the imported data to your organizer, perform an *ActiveSync* operation or synchronize using the manufacturer specified software.

TIPS FOR NAMES AND ADDRESSES:

- Your PDA organizer may have only one name and/or one address field. *Artsystems* has two fields for the name and two fields for the address. It is recommended to verify the name field/address field formats.
- If only one name field is available, it is recommended to export the last name field and your address 1 field from *Artsystems* respectively. You can then search names and addresses and make the corrections after the import procedure within the .txt file with *Microsoft Excel* save the changes then import the .txt file.

UPDATING PDA CONTACTS WITH ARTSYSTEMS

When a contact record is updated on-the-fly in the mobile device, this information should also be updated in *Artsystems* to keep the databases consistent.

1. Give the changed contact in the PDA a category (i.e. – Galpro).
2. Export the contacts with this category to a PC file for use with updating the *Artsystems* contact record.
3. Once all contact records in *Artsystems* are updated, clear the Galpro contacts within the PDA and re-update the *Artsystems* contacts by exporting and importing again.
4. Contact data should now be synchronized.

If further assistance is needed, please contact Artsystems Support.

Artsystems Support 212-620-5500 x 2

<mailto:Support@artsystems.com>