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PDA Interface

CDM Plus has the ability export individuals from your **CDM Plus database** into the **Palm Desktop** application. Once this has been accomplished, individuals imported from CDM Plus behave exactly as any other contact in the **Palm Desktop.** Most importantly, these imported contacts can be synced into your handheld computer running the **Palm OS.**

Caution: This feature is not a direct conduit with your **CDM Plus database.** Changes made in CDM Plus are not reflected in individuals that have been imported into the **Palm Desktop** and vice versa. Subsequent imports may produce duplicate records as re-importing individuals inserts new contacts rather than updating existing ones. Be very aware of the contacts already in your **Palm Desktop** software when importing since **YOU CANNOT UNDO AN IMPORT INTO THE PALM DESKTOP SOFTWARE!**

For instructions on performing an **export out of CDM Plus** and importing the exported individuals **into your Palm Desktop software,** refer to the section below appropriate to your platform:

Macintosh

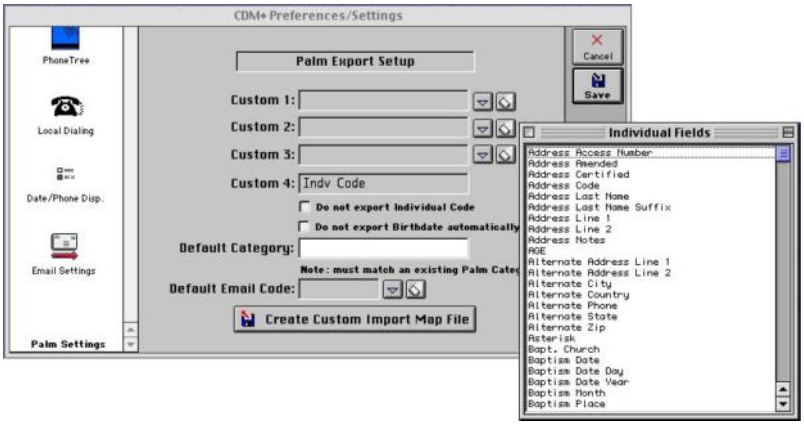
(Note that these instructions were written for **version 2.5** of the **Palm Desktop for Macintosh.**)

Establish your Export Settings

1- Go to **File,** then to **Setup,** then to **Preferences/Settings.**

2- **Scroll** on the left to **Palm Settings** (last option) and **Click** that option.

3- **Select** the **Individual Fields** you want to appear in the **Custom 1, Custom 2** and **Custom 3** fields in the **Palm Desktop Software.**



4- If you *do not* want the **Individual Code** to appear in **Custom slot 4,** check the **"Do Not Export Individual Code"** option. (See the note above regarding this field.)

5- **Enter the default category** for the exported individuals, *or* **leave this field blank** to not include a category. This category must be established in the **Palm Desktop** software prior to importing individuals from **CDM Plus.**

6- **Indicate to CDM Plus** what **Phone Type** is the e-mail address that will be imported into the **E-Mail** field in the **Palm Desktop.**

7- The **Palm Desktop** application will insert an event with a 5-day reminder into your **Datebook** for each birthdate you import. This could result in the addition of a large number of events. To work around this, you can check the **"Do not export Birthdate information automatically"** (Mac) option, and no birthdates will be exported.

8- Click **Save.**

Macintosh users may ignore the **Create Custom Import Map File** button. This creates a mapping file for the **Windows version of the Palm Desktop** software that pairs the exported CDM Plus fields with fields in the **Palm Desktop** software. When individuals are exported from the Macintosh, the fields are placed in an order that will match the default import field order in the **Palm Desktop** software.

Export Individuals from CDM Plus

NOTE: You may use the **Individual Record Selection** to generate an export file for the **Palm Desktop.** The instructions use the **List Export Palm** option. If you use the **Individual Record Selection,** select the **Palm Merge File** option and follow these instructions from **Step 4.**

1- In **Membership,** go under the **List Repts** menu to **List Export Palm.**

2- Choose the **type of list** you want to use and click **Ok** or press **Return.**

3- **Double-click** over the **Codes** you want, or use **Move All** to select all the codes.

4- If you need to use a category other than the one you entered above, enter the **new category** here.

5- Check **"Private"** if you want these records to be private.

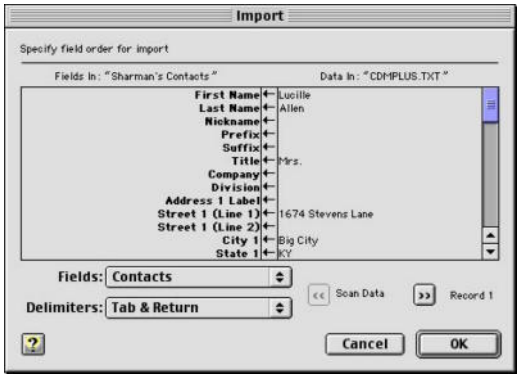
6- Make sure that **Mac Desktop** is selected under **Export Field Order.**

7- Click **Ok** or press **Return.**

8- Enter the **name of the export file** (or keep the default **CDMPLUS.TXT**) and choose a **location** to save the export file to. It doesn't matter where you place the file on your hard drive.

CDM Plus will **automatically remove duplicate individuals from the export list.** Since the export works best as a *one-time only operation,* you might consider establishing a **Temporary Code** on a **User Defined List** and assigning the individuals you want to export to that list. (See the **Membership** section of this manual for more information on how to do this.)

Import Individuals into the Palm Desktop



1- In the **Palm Desktop Application,** go under **File** to **Import...**

2- **Choose** the file you exported in **Step 8** of "Export Individuals from CDM Plus" (above).

3- Make sure that **Contacts** is chosen under **Fields.**

4- Make sure that **Tab & Return** is chosen under **Delimiters.**

5- **Verify** that the fields match above. You can re-arrange the **Palm** fields on the left.

6- Click **OK** or press **Return.**

Windows

(Note that these instructions were written for **version 4.0** of the **Palm Desktop for Windows.**)

Establish your Export Settings

1- Go to **File,** then to **Setup**, then to **Preferences/Settings.**

2- **Scroll** on the left to **Palm Settings** (last option) and **Click** that option.

3- **Select** the **Individual Fields** you want to appear in the **Custom 1**, **Custom 2** and **Custom 3** fields in the **Palm Desktop Software.**

4- If you *do not* want the **Individual Code** to appear in **Custom slot 4,** check the **"Do Not Export Individual Code"** option. (See the note above regarding this field.)

5- **Enter the default category** for the exported individuals, *or* **leave this field blank** to not include a category. This category must be established in the **Palm Desktop** software prior to importing individuals from **CDM Plus.**

6- **Indicate to CDM Plus** what **Phone Type** is the e-mail address that will be imported into the **E-Mail** field in the **Palm Desktop.**

7- Click the **"Create Custom Import File"** button. You will be prompted to save a **"CDMPLUS.TPA"** file. Save this file to your **Palm directory**, perhaps **C:\Palm.**

8- Click **Save.**

The **CDMPLUS.TPA** file is a mapping file that pairs the data in the file you will export from CDM Plus to the fields in the **Palm Desktop** application.

Export Individuals from CDM Plus

NOTE: You may use the **Individual Record Selection** to generate an export file for the **Palm Desktop.** The instructions use the **List Export Palm** option. If you use the **Individual Record Selection,** select the **Palm Merge File** option and follow these instructions from **Step 4.**

1- In **Membership,** go under the **List Repts** menu to **List Export Palm.**

2- Choose the **type of list** you want to use and click **Ok** or press **Enter.**

3- **Double-click** over the **Codes** you want, or use **Move All** to select all the codes.

4- If you need a category other than the one you entered above, enter the **new category** here.

5- Check **"Private"** if you want these records to be private.

6- Make sure that **Windows desktop** is selected under **Export Field Order.**

7- Click **Ok** or press **Enter.**

8- Enter the **name of the export file** (or keep the default **CDMPLUS.TXT**) and choose a **location** to save the export file to. It doesn't matter where you place the file on your drive.

CDM Plus will **automatically remove duplicate individuals from the export list.** Since the export works best as a *one-time only operation,* you might consider establishing a **Temporary Code** on a **User Defined**

List and assigning the individuals you want to export to that list. (See the **Membership** section of this manual for more information on how to do this.)

Import Individuals into the Palm Desktop

1- In the **Palm Desktop Application**, go under **File** to **Import...**

2- **Choose** the file you exported in **Step 8** of "Export Individuals from CDM Plus" (above).

3- Make sure that **Contacts** is chosen under **Fields.**

4- Make sure that **Tab & Return** is chosen under **Delimiters.**

5- **Verify** that the fields match above. You can re-arrange the **Palm** fields on the left.

6- Click **OK** or press **Enter.**

Fields That Are Exported From CDM Plus

This is a **list of fields** that are exported from CDM Plus. Recall that you can specify **Custom 1**, **Custom 2** and **Custom 3. Custom 4** will be blank or contain the **Individual Code**, depending on your settings. The **Date Modified** is also set to the current date. Following the **Export** field is the corresponding **Palm** field in the default mapping:

CDM Plus Export File	Palm Field
Last Name	Last Name
First Name	First Name
Primary Title	Title
Primary Address Line 1	Address Line 1
Primary address Line 2	Address Line 2 (Mac only)
Primary City	City
Primary State	State
Primary Zip	Zip
Alternate Address Line 1	Alternate Address Line 1 (Mac only)
Alternate Address Line 2	Alternate Address Line 2 (Mac only)
Alternate City	Alternate City (Mac only)
Alternate State	Alternate State (Mac only)
Home Phone	Phone 1
Work Phone	Phone 2
E-Mail Address	Phone 3 (Windows only)
E-Mail Address	E-Mail (Mac only)
All Other Individual Phones	Phone 4
Notes	Attached Notes
Custom 1	Custom 1
Custom 2	Custom 2
Custom 3	Custom 3
Custom 4	Custom 4
Palm Category	Palm Category