

Daylite Synchronization Guide

Synchronizing iCal, Address Book, iPhone, smart phones, PDA's and your phone with Daylite

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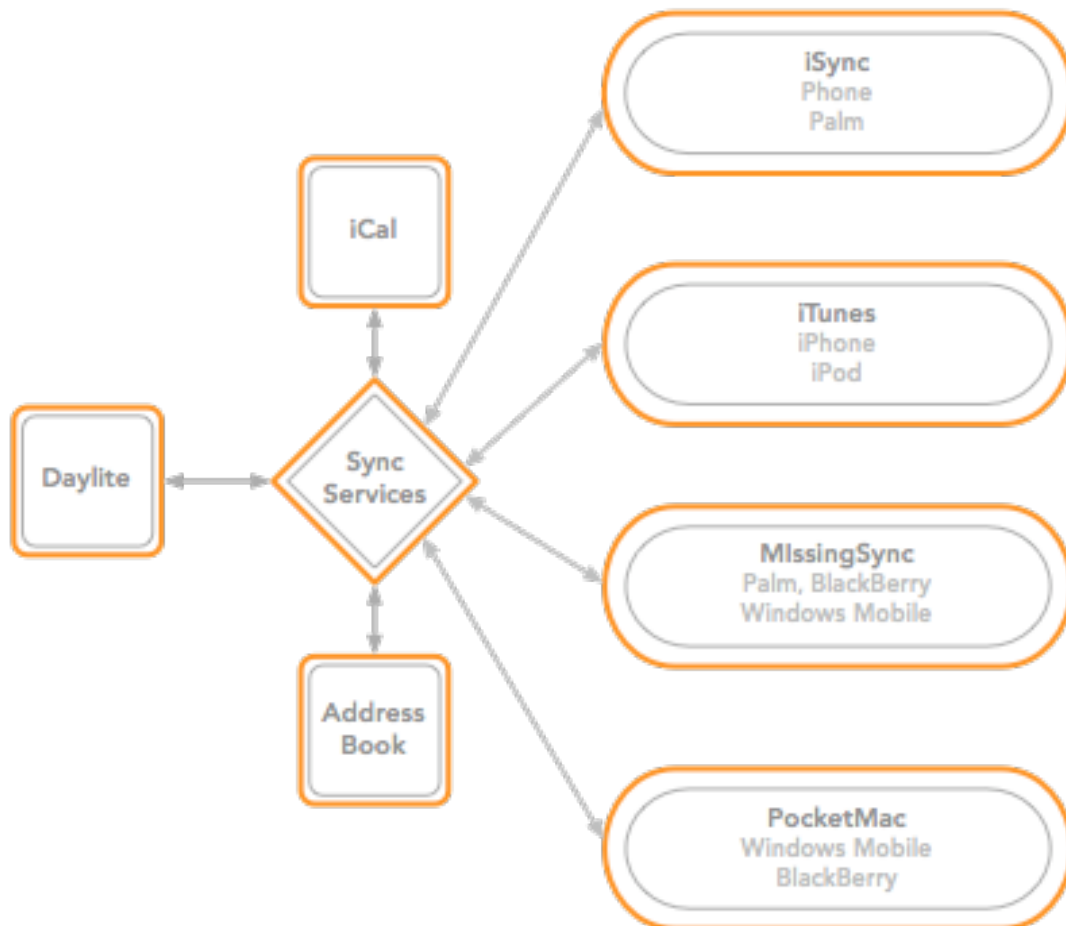
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Understanding the Synchronization system

The Daylite Synchronization system is built on top of Apple's Sync Services. Sync Services is the broker between applications and devices that want to share data such as Contacts and Calendars. It is through Sync Services that a contact or an event in Daylite can end up on your mobile device, iCal, Address Book and vice versa.

Sync Services holds a copy of the data that you determine should be synchronized. By default all data in iCal and Address Book have a representation in Sync Services. Since Daylite is a multi-user system, you can specify what data is passed to Sync Services and thus synchronized to Address Book, iCal and your mobile device.



"Idle Sync" and "Slow Sync"

We have introduced a new concept called "Idle Sync" in Daylite. Instead of having to push a button to sync between Daylite and Sync Services, the changes are now automatically pushed from Daylite to the others (if they are open). For example, when you edit a contact in Daylite, the changes are pushed to Sync Services after Daylite has

been idle for 10 seconds or more after you hit the "OK" button. If there is another change within that 10 seconds, the timer is reset and the sync will happen 10 seconds henceforth. The only time you really have to worry about hitting a "sync button" is when you connect your mobile device and trigger a sync using Apple iSync, Mark-Space's Missing Sync or PocketMac for BlackBerry.

Daylite may not be open all the time and you may make changes in iCal or Address Book or on your mobile device, so Daylite will not be receiving any of those change. Subsequently, when you open Daylite and you make a change, "idle sync" will occur bringing everything back to a consistent state. Since Daylite is a multi-user system, we try not to be too aggressive with the sync frequency. You can manually trigger a sync by choosing Actions > Synchronize.

When you ask Daylite to work with Sync Services the first time or when you change any of your sync preferences, Daylite will trigger a "slow sync." A slow sync tells Sync Services to reset the cache between Daylite and Sync Services and get and push the whole data set. As the name implies, a slow sync can take some time.

Personal data vs. business data

Sync services is inherently a single user system. It has no concept of multiple users. It understands your personal data and your devices and does a phenomenal job to make sure the personal data you want is on the device you use. It makes assumptions such as "if you delete a contact on your mobile device, you also want it deleted from your Address Book." It's a fair assumption, but it doesn't work in a multi-user, shared data scenario. For example, if you share an important contact in Daylite with your colleagues and any one of those colleagues deletes the contact from their mobile device, you sure as heck don't want to lose that contact and the valuable information attached to it. Daylite breaks with the Sync Services "pattern" and attempts to safeguard against such issues. Daylite places a higher value on business data than on convenience and to safeguard against issues like the one mentioned above, you may be required to take an additional step or look in the "trash" to un-delete.

Synchronization vs. Offline Synchronization

It is important to understand that Daylite's integration with Sync Services does not replace the Online/Offline synchronization system that has been part of Daylite since 2003. Synchronization and Offline Synchronization are different system that serve different purposes.

Daylite Palm Conduit, PocketMac BlackBerry, Legacy Address Book Sync - discontinued

There are huge benefits to the new synchronization system, so it makes little sense to maintain the old synchronization ways. When it comes to calendars and contacts, you'll have a better experience, reliability and flexibility with the new way.

Setting up synchronization in Daylite

You can set up synchronization by going to the Daylite Preferences and clicking Synchronization. Click "Turn Syncing On" and follow the assistant. The assistant will help you set up both contact and calendar synchronization.

Synchronization preferences are remembered on a database cluster basis. Each cluster of databases (main/online, offline and new backups) are assigned a globally unique ID and this ID is what is registered with Sync Services.

Once you've completed using the assistant or in the future, you can always modify your sync preferences in this pane. The changes take effect on the first sync (which will be a "slow sync") after you dismiss the preference pane by going to another preference pane or by closing the preferences window.

Calendar synchronization preferences

Daylite pairs appointment categories with iCal calendars. When you go to the calendar section of the sync preference panel, you will see a combined list of Daylite appointment categories and iCal calendars. As you select which ones to synchronize, Daylite will create the missing category or missing iCal calendar. If you rename a calendar in iCal, the category in Daylite will also be renamed. This calendar / category pairing system allows you to keep data out of iCal or out of Daylite. Only appointments, event and tasks that owned by you will synchronize. In addition, meetings that you've accepted and appointments/tasks that have been delegated to you will synchronize.

Contact synchronization preferences

You can choose to sync all contacts, your contacts, or contacts in your sync list (the first two are simply conveniences to put contacts in the sync list for you). Since the Address Book is directly reflection of what is in Sync Services, you can choose to sync those contacts to your entire Address Book or to a "Daylite" group within Address Book. Only organizations in your sync list are synchronized. If you have no organizations in your organization sync list, then a contact may have the company name (if that contact is linked to an organization in Daylite), but no separate object will be created in Address Book.

You can easily maintain your sync list by checking the "sync" switch on the contact card or by dragging contacts to the "Sync list." A sync list is maintained for each user.

Synchronization timing

Synchronization happens 10 seconds after you edit or add an object (task, appointment, event, contact, organization). iCal and Address Book trigger synchronization after an edit and being deactivated (clicking in another app) and Daylite is connected to the database.

Frequently asked questions

I'm not getting any data on my mobile device—what could be the problem?

Since there are many players in the Sync Services ecosystem, you will need to do some elimination. If you can synchronize between Daylite and iCal/Address Book, then the issue is likely with the system that gets data from Sync Services to your device. This could be iSync, MissingSync or PocketMac. Whichever you are using, you need to make sure it is enabled and configured properly.

For help with troubleshooting iSync, look here:

<http://docs.info.apple.com/article.html?artnum=302115>

For help with troubleshooting MissingSync, look here:

http://www.markspace.com/support/kb.php?x=&mod_id=2&id=2611

For help with troubleshooting PocketMac, look here:

http://www.pocketmacsupport.net/index.php?_m=knowledgebase&_a=view

If you are unable to sync between Daylite and iCal/Address Book, then make sure you have synchronization enabled in Daylite and that you have the proper categories selected.

How do I reset the "sync memory"?

Choose Daylite > Preferences, click Synchronization and click the "Reset Sync" button. This will mark the system for a "slow sync." A "slow sync" will refresh everything and may take some time.

Can I setup the sync on multiple machines?

No. Each user is tied to a specific machine. We recommend you use the machine that the user uses most of the time—or the machine that they have their mobile device connected to.

Can I setup multiple databases to sync in one Mac OS X user account?

For each Mac OS X user account, you can setup one Daylite user per Daylite database.

Can you I synchronize my mobile device even if Daylite is not launched?

Yes. Since Sync Services holds a copy of the data and you don't need to have Daylite running. The next time you launch Daylite, it will synchronize (after some idle time) with Sync Services.

How do I setup the system so that only my business contacts synchronize?

In Daylite, chose to synchronize your Sync List to the Daylite group in Address Book. Put all your relevant business contacts in that Sync List. If you add a contact in Address Book in the Daylite group, it will be added to Daylite and put in the Sync List.

How many contacts can I synchronize?

We've had good results with 2000 or less contacts and organizations (combined). You may be able to a bit higher than that on some computers, but we strongly recommend that you keep your syncing data set as small as possible because of the memory intensive nature of Sync Services. This will make synchronization faster. Many handheld devices do not work well at all with large data sets. We tested 33000 contacts and 21000 organizations and it failed—Sync Services timed out after 3 hours or so.

How do I setup the system so that only my business calendar synchronizes?

In Daylite, only select to synchronize what you consider as your business calendar, leaving out any calendars you don't want in Daylite.

Can I synchronize iCal subscribed calendars to Daylite?

No. Because subscribed calendars are "read-only" there is no way to add or edit appointments and tasks—so synchronization is not possible. You may opt to export the calendar from iCal and import the resulting .ics file into Daylite.

Can I synchronize shared contacts?

Yes. If you can see and edit the contact, you will be able to add the contact to your Sync List and it will synchronize. Daylite maintains a sync list for each Daylite user.

Can I synchronize another user's calendar to my mobile device?

No. Mobile devices and by extension iCal are inherently single user, so only your appointments, events, tasks and reminders will synchronize. Tasks and appointments that have been assigned or delegated to you will sync and so will accepted meetings.

Can I synchronize meetings?

Yes. Meetings you have accepted will synchronize. If you delete the meeting on your device or in iCal, then you will be removed from the meeting (similar to rejecting the meeting).

What happens if I delete an appointment in iCal?

If the appointment is in a calendar that has been set to synchronize in Daylite, then the appointment will be removed from Daylite. You can retrieve the appointment by pulling it out of the Daylite trash.

What happens if I delete an appointment in Daylite?

If the appointment was already in Sync Services, it will be removed. If it was not in Sync Services, then it will not be synchronized. You can retrieve the appointment by pulling it out of the Daylite trash.

What happens if I change the owner of an appointment or task in Daylite?

Since you do not own the appointment anymore and you are not an invitee of a meeting, the appointment will no longer show in Daylite and it will be deleted from Sync Services and thus iCal and your mobile device (after you sync the device). The same is true for a task. If you don't own it and it has not been delegated to you, then it will be removed from Sync Services.

How many appointments/events can I synchronize?

We've had good results with 4000 appointments/events.

What happens if I delete a contact in Daylite?

If you delete a contact in Daylite, it will be deleted from Sync Services and thus removed from Address Book and your mobile device (after you sync the device). The contact will also be removed from other users' Sync Services. You can retrieve the contact from Daylite trash if you want to undelete it.

What happens if I delete a contact in Address Book?

If that contact is being synchronized to Daylite, then the contact will go into the trash. You can then permanently delete it from the trash or pull it out of the trash. If you want to simply remove it from Address Book and not Daylite, then remove the contact from your sync list. This removes the contact from Sync Services and Address Book (and your mobile device).

What happens if I move a contact out of my sync list?

The contact will be deleted from Sync Services and thus removed from Address Book and your mobile device (after you sync the device).

What happens if I move a contact out of my Daylite group in Address Book?

It will be put in the Trash in Daylite. You can recover the contact by going to Trash window, selecting it and restoring it. If you've chosen to sync your "Sync List," you will need to add it back to the sync list.

What are the rules for reminder/alarm synchronization?

In iCal, you can set multiple alarms for an event or appointment. We now have multiple alarms in Daylite and can synchronize them with iCal. During synchronization, Daylite will grab the type of the first alarm and the date of the last. Display, Sounds and Email alarms are supported. File and Script alarms are not. We recommend that you only set one alarm per iCal event/appointment/task. We believe the greater majority of people use one alarm per event anyways.

How do I stop reminders from firing in both iCal and Daylite?

In iCal, you set a preference to not fire alarms while iCal is not running. Go to iCal -> Preferences -> Advanced and select "Turn off alarms when iCal is not open." Please send us feedback, if you feel that we should add a preference in Daylite to turn alarms in Daylite.

What happens if another user deletes a contact in Daylite that I'm synchronizing?

It will be put in the Trash in Daylite. If you do not own the contact and you are not an admin, you will need to ask an admin to restore the contact. If you've chosen to sync your "Sync List," you will need to add it back to the sync list.

What happens if another user deletes one of my appointments in Daylite?

It will be put in the Trash in Daylite. You can restore it from there unless an admin has emptied the trash.

What happens if another user delegates a task or appointment to me in Daylite?

If you have the category set to synchronize, it will be pushed to Sync Services and then iCal and or your mobile device.

Is my mobile device supported?

If you already synchronize your mobile device with iCal and Address Book, then your device is supported.

If you are not already synchronizing, please check the following page for supported devices: <http://www.apple.com/macosx/features/isync/devices.html>

Additionally, you can check the Missing Sync series of products: <http://www.markspace.com/products.html>. Please note that you must purchase Missing Sync.

For BlackBerry support, you can also check PocketMac: <http://www.pocketmac.net/products/pmblackberry/>. Please note that you should choose to sync with Address Book and iCal instead of syncing directly with Daylite.

How do I sync with my iPhone?

Follow Apple's instructions on this page:

<http://docs.info.apple.com/article.html?artnum=305741>

Daylite Touch is now available. [Click here](#) to learn more.

How do I sync with my Palm?

There are two ways for syncing with your Palm device. The first way is by using iSync. Follow the instructions here: [Setting up to sync your Palm OS device](#).

The other way is to use [The MissingSync for Palm](#) and then follow the instructions provided by MissingSync.

How do I sync with my BlackBerry?

Assuming that you've enabled synchronization in Daylite and set your preferences appropriately, you will need to use [The Missing Sync for BlackBerry](#) or [PocketMac for BlackBerry](#) (which is freely provided by RIM). Follow the instructions on how to synchronize your Address Book and iCal. Please refrain from using direct sync between PocketMac and Daylite.

How do I sync with my Nokia smartphone?

Assuming that your device is supported by iSync, simply follow [these instructions for Bluetooth mobile phones](#) and [these instructions for USB mobile phones](#).

How do I sync with my Windows Mobile Device?

Assuming that you've enabled synchronization in Daylite and set your preferences appropriately, you will need to use [The Missing Sync for Windows Mobile](#) or [PocketMac Pro](#). Follow the instructions on how to synchronize your Address Book and iCal. Please refrain from using the direct sync between PocketMac and Daylite.

How do I sync with my regular cell phone?

Assuming that your device is supported by iSync, simply follow [these instructions for Bluetooth mobile phones](#) and [these instructions for USB mobile phones](#).

What happens if I change a setting in the Daylite sync preference pane?

A “slow sync” will occur when you dismiss the Sync preference pane.

When do changes made by another user on another computer synchronize?

Daylite synchronizes 10 seconds after the last edit, changes in the main database will synchronize at that time. If you have no edits and you know or suspect that changes have been made by other users, use the Actions -> Synchronize menu item to trigger the sync.

What happens if I restore a Daylite database?

When you restore a database that has already been set up to synchronize, Daylite will trigger a “slow sync” and refresh everything (which will be time consuming), newer changes from Address Book and iCal will propagate to the restored database. If you restore to a backup that was made prior to setting up sync, you will have to reset the sync preferences after the restore.

What happens when other users make many changes while I’m disconnected?

Assuming that you have access to the data, the changes will be synchronized the next time you connect to the database and Daylite is idle for a few seconds.

When should I use the Synchronization menu?

You will probably not need to use that menu on a day to day basis. Synchronization will automatically happen after you make your edits. If users are editing data on other computer or if an assistant is editing your calendar on his/her computer, then you will need to use the Synchronization menu.

I have some contacts in Address Book, some in Daylite and some in both. What should I do to prevent duplicates?

The best thing to do is to delete the suspected double entries from Address Book **before** you turn on synchronization. Avoid deleting the whole Address Book folder in Application Support. This assumes that you have a richer record in of that person in Daylite. In most cases, the sync engine will handle the duplicate, but in some cases it may not—especially if some information is misspelt or has extra characters.

I have multiple alarms on my appointment in iCal, but I don’t see those in Daylite. Are they lost?

No. We now have multiple alarms in Daylite and can synchronize them with iCal.

I’ve scheduled an appointment (created a contact) in Daylite and some bits of information are not making it to my device. What could I be doing wrong?

The first step in troubleshooting this kind of problem is to check in to see if the data is in iCal or Address Book, if it is, then the issue lies in the sync between sync services and your mobile device. Daylite syncs with Sync Services and not the device directly.

How are Daylite contact/organization categories mapped to Address Book?

Address Book does not have the concept of categories, but it has the concept of groups. If you select the option "I synchronize with an iPhone or the Missing Sync for Palm OS" in the preferences, then groups will be created in Address Book to match the categories in Daylite.

The groups in Address Book will not be created as categories in Daylite. If you start with your data in Address Book and would like your groups to map to Daylite categories, use the method in this video:

<http://movies.marketcircle.com/mov/daylite39/MappingAddressBookGroups2DLcategories.mov>

Daylite	Address Book	iPhone
Organization	Company (switch)	Contact
Contact	Contact	Contact
Contact category	Group (with pref enabled)	Group
Group	Not synced	Not synced

How are Daylite calendar categories mapped to iCal?

There is a one to one mapping between the appointment/task/event categories in Daylite and a calendar in iCal. So if you have a "Development" category in Daylite, you will have a "Development" calendar in iCal. You would have to select that category/calendar pair synchronize in the preferences.

Which fields are synchronized?

Here is a list of the fields that are synchronized:

Object	Fields
Contact	Phones Emails IM's URLs Street Addresses Company Name First Name Hobby Contact Image Job Title Last Name Middle Name Nickname Detail Suffix Ticker Symbol Title (which is Mr., Mrs., etc) Note
Organization	Phones Emails IMs URLs Street Addresses Company Name Company Image Ticker Symbol Detail
Appointment/Event	Title Detail Location Start date End date Repeats Reminders (only the first one from iCal)

Object	Fields
Task	Title Detail Start date Complete date Status Priority

Help and other resources

There are a number of resources available to help you to learn more about Daylite and provide answers when you have technical questions.

- We have certified partners who can provide product training and other specialized services. For more information, [click here](#).
- Apple Help offers step-by-step instructions and tips for making the most out of Daylite. While using Daylite, choose **Help > Daylite Help**.
- The support website and knowledge base has up-to-date articles and movies that can help you solve technical difficulties. [Click here](#) for more information.
- Visit <http://forums.marketcircle.com> to share ideas, tips, and questions with other users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums.