

The logo for HandheldContact features a green icon of three curved lines resembling a signal or Wi-Fi symbol above the letter 'H'. The text 'HandheldContact' is written in a bold, sans-serif font, with 'Handheld' in black and 'Contact' in a dark grey color.

HandheldContact

Handheld Contact for Pocket PC and Treo User Guide

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Introduction

Our Handheld Contact service enables automatic, two-way, wireless synchronization between your handheld device and your ACT! contacts, notes, histories, calendar items, and to-do items.

The service involves the installation of two programs: Handheld Contact, which installs on your handheld device, and the Handheld Contact Computer Application, which installs on the computer or the server that is home to your ACT! database.

Handheld Contact on your handheld device enables secure wireless access to ACT! and provides you with the power to manage ACT! data from your handheld device.

The Handheld Contact computer application on your computer or server enables you to manage users and the ACT! data which is synced between ACT! databases and handheld devices set up with Handheld Contact accounts.

Once both programs have been installed, some set-up is required before you begin syncing. For quick default set-up, please refer to the “Running Handheld Contact for the First Time” section of our Handheld Contact 2.0 Installation Guide which is available at www.handheldcontact.com/downloads.php.

This manual details the basic functions and features of Handheld Contact for your Pocket PC device.

Adding an ACT! contact on your Pocket PC

Because Handheld Contact enables two-way, wireless syncing between your ACT! database and your Pocket PC device, not only can you access your ACT! contacts on your Pocket PC, but you can also add ACT! contacts to your ACT! database using your Pocket PC. Add ACT! contacts using your Pocket PC as follows.

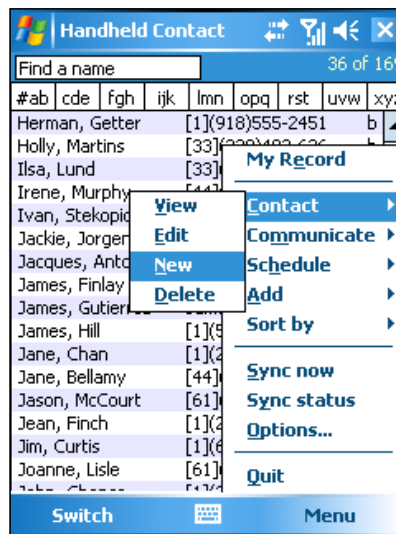
1. Click the **Handheld Contact** icon (see Figure 1) in your **Programs** folder.

Figure 1 - The Handheld Contact icon



- Handheld Contact opens.
2. Access the HHC menu (see Figure 2).

Figure 2 - The HHC menu



3. Select **Contact** then **New** from the HHC menu.
 - The **New Contact** form appears.
4. Enter data for the contact by selecting fields with the stylus and typing with keypad on your Pocket PC (see Figure 3).

Figure 3 - Entering contact data

FirstName:	Chris
LastName:	Huffman
Company:	CH Gourmet Gifts
Department:	Administration
Title:	CEO
Address 1:	13 East 54th St.
Address 2:	
Address 3:	
City:	New York
State:	NY
Zip:	10008
Country:	United States
Business Ph:	[1]2125551758
Home Phone:	[1]5165555455

Details | Activities | Notes/History

Edit

Note: Your new contact will not appear in your ACT! database until you refresh your ACT! database after the next time you sync. Refresh your ACT! database by selecting **Refresh** from the View menu in ACT!.

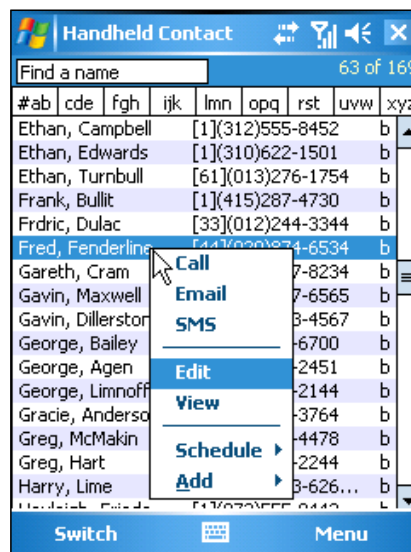
- Once you have entered all desired information for the contact you are adding, tap **OK** in the top right corner with your stylus.
 - The contact you entered appears in your contact list.

Editing a contact's information

On top of enabling you to add ACT! contacts to your ACT! database using your Pocket PC device, Handheld Contact also enables you to edit information for existing contacts. Edit a contact's information as follows.

- In Contacts view scroll to find the contact you wish to edit.
- Tap and hold the stylus on the contact until the context sensitive menu appears, then select **Edit**. (see Figure 4)

Figure 4 - Accessing the Views/Edit Contact screen



- The *Edit Contact window* appears.
- Highlight the field you want to edit using the stylus.
 - Using the Pocket PC keypad, make your edits.
 - Repeat 3-4 for each field you want to edit.
 - Once you have completed all desired changes to the contact you are editing, tap **OK** in the top right corner with your stylus.
 - The contact you edited is saved and will update in the ACT! database on next sync.

Scheduling ACT! activities on your Pocket PC

By enabling two-way, wireless syncing between your ACT! database and your Pocket PC device, Handheld Contact allows you to schedule ACT! activities for yourself and other users syncing with the same database using your Pocket PC device. Schedule ACT! activities using your Pocket PC as follows.

- Access the HHC menu.
- From the menu select **Schedule**, then select which type of activity you wish to schedule.
 - The *Add activity window* appears (see Figure 6).

Figure 6 - The Edit Activity screen

The screenshot shows the 'Edit Activity' screen in the Handheld Contact application. The title bar reads 'Handheld Contact' and includes navigation icons and an 'ok' button. The main area contains the following fields:

- Type: Meeting
- Date: 2007-04-11
- Time: 11:39 AM
- Timeless:
- Duration: 1 hr.
- With: Fred Fenderline
- Scheduled For: Chris Huffman
- Scheduled By: Chris Huffman
- Regarding: (empty text field)
- Priority: Low
- Desktop Alarm: Off

At the bottom, there are two tabs: 'Activity' and 'Details'. Below the tabs is a blue bar with the word 'Edit' and a keypad icon.

Note: Your newly scheduled activity will not appear in your ACT! database until you refresh your ACT! database after the next time you sync. Refresh your ACT! database by selecting **Refresh** from the View menu in ACT!.

Note: If you scheduled an activity for another user, it will not appear in their HHC – Calendar or Tasklist until the next time they sync.

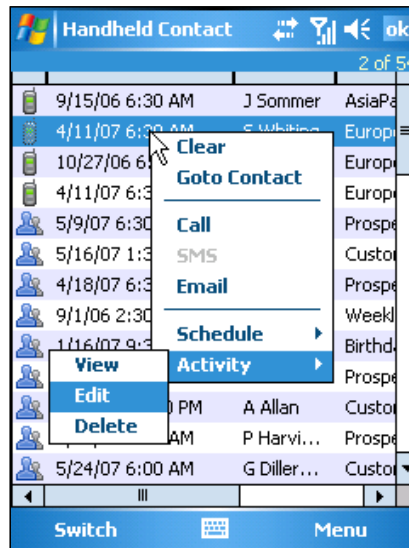
3. If necessary, change the *activity type* and other drop down fields by tapping the downward pointing arrow next to each field with your stylus. From the expanded drop down tap your selection to make the change and collapse the drop down.
4. Adjust the date by tapping the downward pointing arrow next to the date field. From the small calendar tap the date for the activity with your stylus to make the change and collapse the calendar.
5. Record any additional details by selecting the **Details** tab at the bottom of the screen and typing with the Pocket PC keypad.
6. Once all edits are complete, tap **OK** in the top right corner with your stylus.
 - The new activity is saved and will update in the ACT! database on next sync.

Editing an Activity

You can easily edit existing activities in Handheld Contact. Edit an activity as follows.

1. In the Tasks scroll to find the activity you wish to edit.
2. Tap and hold the stylus on the activity until the context sensitive menu appears, then select **Edit** (see Figure 7).

Figure 7 - Accessing the Edit Activity screen



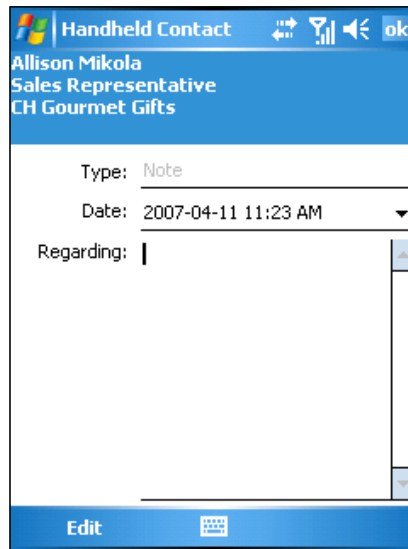
- The *Edit Activity window* appears.
3. If necessary, change the *activity type* and other drop down fields by tapping the downward pointing arrow next to each field with your stylus. From the expanded drop down tap your selection to make the change and collapse the drop down.
 4. Adjust the date by tapping the downward pointing arrow next to the date field. From the small calendar tap the date for the activity with your stylus to make the change and collapse the calendar.
 5. Edit any additional details by selecting the **Details** tab at the bottom of the screen and typing with the Pocket PC keypad.
 6. Once all edits are complete, tap **OK** in the top right corner with your stylus.
 - The edited activity is saved and will update in the ACT! database on next sync.

Adding a Note

Handheld Contact enables you to add notes about your contacts on your Pocket PC device just as you can in ACT! on your desktop computer. Add a note as follows.

1. In Contacts view scroll to find the contact you wish to edit.
2. Tap and hold the stylus on the contact until the context sensitive menu appears, then select **Add** then **Note**.

Figure 9 - Accessing the Add Note screen



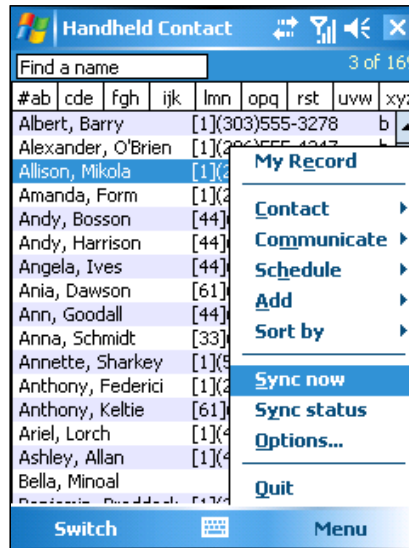
- The *Add Note window* appears for the selected contact.
3. If necessary, adjust the date by tapping the downward pointing arrow next to the date field. From the small calendar tap the date for the activity with your stylus to make the change and collapse the calendar.
 4. If necessary, adjust the time by selecting the hour or minute and typing the new value on the Pocket PC keypad.
 4. Record the note by selecting the Regarding field and typing the note with the Pocket PC keypad.
 6. Once you've finished recording the note, tap **OK** in the top right corner with your stylus.
 - The note is saved and will update in the ACT! database on next sync.

Syncing Manually

Handheld Contact allows you to manually force syncing at any time. Manually force a sync as follows.

1. From the menu, select **Sync Now** (see Figure 10).

Figure 10 - Sync Now



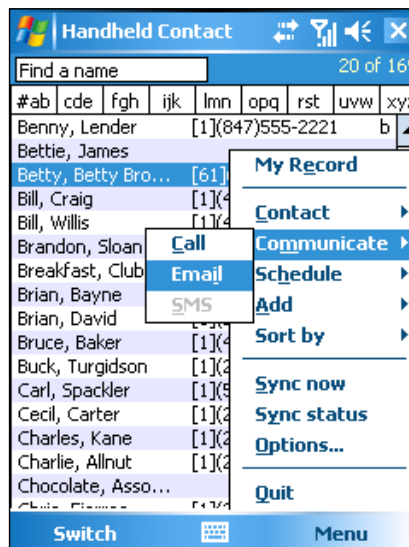
- Handheld Contact automatically executes a sync.

Emailing a Contact

You can email ACT! contacts directly from Handheld Contact on your Pocket PC. Email a contact as follows.

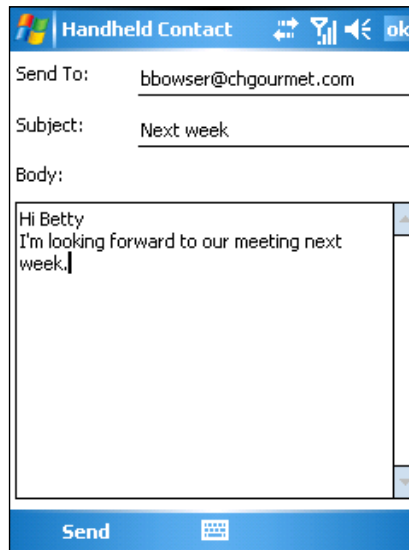
1. In Contacts view scroll to find the contact you wish to edit.
2. Tap and hold the stylus on the contact until the context sensitive menu appears, then select **Communicate** then **Email** (see Figure 11).

Figure 11 - Accessing the Compose Message screen



- The *Compose Message window* appears.
- Using the Pocket PC keypad type the subject and body (see Figure 12).

Figure 12 - Writing an email



- Using the stylus tap the softkey labeled **Send**.
 - Your email is sent.

Dialing a Contact

You can dial an ACT! contact directly from his or her entry in HHC. Dial a contact as follows.

- In Contacts view scroll to find the contact you wish to edit.
- Tap and hold the stylus on the contact until the context sensitive menu appears, then select **Communicate** then **Call**.
- If there is only one phone number associated with the chosen contact, that phone number will be dialed right away.
- If there are multiple phone numbers associated with the chosen contact, all numbers are displayed (see Figure 14). Using the stylus tap the phone number you wish to dial for the selected contact.

Figure 14 - Calling a contact

