

The logo for HandheldContact features a green Wi-Fi symbol (three curved lines) positioned above the letter 'H' in the word 'Handheld'.

# HandheldContact

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Installation Guide

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## HANDHELD CONTACT AT A GLANCE

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Handheld Contact enables two-way wireless synchronization of your ACT! data between your computer and your BlackBerry® device. Handheld Contact enables accurate and up-to-date ACT! data access whenever you need it.

Installation requires a few minutes of your time, just follow this guide you'll be successfully syncing in short order. Please read this guide thoroughly and follow step by step to aid you in installing Handheld Contact on your computer as well as on your BlackBerry device.

## INSTALLING HANDHELD CONTACT ON YOUR ACT! COMPUTER

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Handheld Contact for your computer must be installed while logged in to Windows as a user with administrative privileges. If your Windows account does not have Administrator privileges please ask your IT admin to install the application. If the ACT! database and Handheld Contact are on different computers or on a server you may need to refer to Configuring the Handheld Contact Sync Service in this guide.

1. *Locate and execute HHC-(VERSION).exe.* If you received Handheld Contact on CD, this installation procedure should begin automatically after inserting the CD. If you downloaded Handheld Contact, please decompress the zip file to a folder on your computer and *double-click setup.exe* from this folder.
2. Follow the instructions on each step of the installation wizard.

**Note:** *Please do not run Handheld Contact if you are not logged into Windows under the account that will be the primary user of Handheld Contact. If you had to ask someone to log in as an Administrator to install Handheld Contact please ask them to log out and log back in with your own account before running Handheld Contact for the first time.*

## RUNNING HANDHELD CONTACT FOR THE FIRST TIME

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Before you begin to configure Handheld Contact, be sure to have the following information available:

- Path to ACT! database you will be syncing
- ACT! user name and password for the ACT! database you will be syncing
- Your Handheld Contact user name and password

### Step 1 - Select Database to Sync

Since this is your first time running Handheld Contact, you must select a database before you can continue adding a new user.

1. Handheld Contact will automatically select the last database that was opened in ACT! If this is not the database you want to use, *Click Browse* and find the database you wish to use.
2. *Enter an administrator user name and password* for the selected database.
3. *Click Next* to verify that you've entered the user name and password accurately. If you receive an error please double check that the user name and password you entered is an administrator for the selected database.

### Step 2 - Select the ACT! user

1. From the list of users *Select the ACT! user* you wish to sync.
2. *Enter the password* for the selected user
3. *Click Next* to validate the account. If you encounter an error, ensure that the selected user is active and that the password is entered accurately.

### Step 3 - Enter the Handheld Contact Account

1. *Enter* the Handheld Contact **user name** and **password**. If you do not yet have a Handheld Contact user name and password you can create one using the **Not Registered Yet?** link.
2. If your network environment requires the user of a Proxy, please enter the proxy settings by *Clicking* the **Proxy** button.
3. *Click Next* to validate your account. If you encounter an error, please ensure you've entered a valid Handheld Contact user name and password. You may also retrieve your password if you've forgotten it using the **Retrieve Password** link.

### Step 4 - Select Sync Settings

The Sync Settings for your Handheld Contact account are the rules by which Handheld Contact determines what data will be synced with your device. Default settings will be sufficient for most users, but if you wish to customize your sync settings you may choose Custom settings.

1. *Click* the **radio button beside Default settings** if you don't want to customize your settings now. All settings can be changed later if you should decide to. If you choose Default settings you can skip the rest of this section.
2. *Click* the **radio button beside Custom settings** if you wish to control every aspect of what data is synced with your handheld.
3. *Click* the **Next** button to either finish the wizard (Default settings) or continue customizing your settings (Custom settings).

### Step 5 - Select Contacts to Sync

The third step allows you to select the contact group(s) you want to sync to your mobile device using Handheld Contact. By default a mandatory auto-sync group is selected. Handheld Contact intelligently filters your important and most frequently-used contacts into this group.

1. If you wish to use additional groups, *select* the check box next to each group of contacts you wish to sync.
2. *Click Next* to proceed to the next step.

### Step 6 - Select Activities to Sync

1. As with syncing contacts, Handheld Contact has default settings for syncing activities. You may choose to edit these settings now or turn activity syncing off altogether.
2. *Click Next* to proceed to the next step.

### Step 7 - Select Note/Histories to Sync

1. By default, syncing notes/histories is disabled. If you choose to enable it now, *select* the Synchronize note/histories check box. Then *select* the check boxes next to each group of note/histories you wish to sync.

2. Click **Next** to proceed to the final step.

### Step 8 - Field Mapping

1. By default, 27 common fields are selected for syncing. You can choose up to 72 fields from your ACT! database to sync to the handheld by *clicking* the **Edit field mapping** link.
2. In the field mapping window *select* the **field from your database in the ACT! field column** and then in the **HHC Display Name** column you may choose the label that will be used for this field on the Handheld.
3. Once your selections are complete *Click* **OK** and then *Click* **Finish**.

## CONFIGURING THE HANDHELD CONTACT SYNC SERVICE

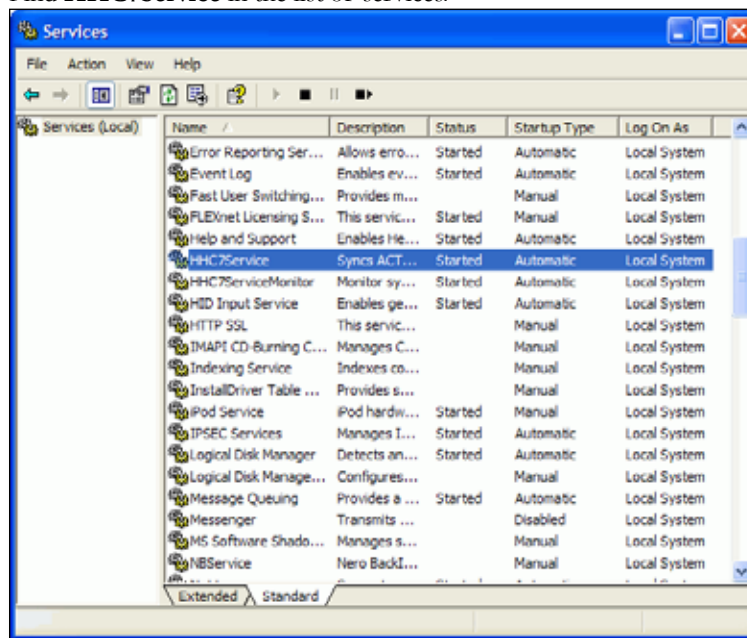
Handheld Contact is able to synchronize your ACT! database in many different network environments and configurations. Depending on the type of security implemented on your network, the Handheld Contact service may require special permissions in order to access your ACT! database.

Please follow the instructions in this section if you receive an error stating “Communication with sync engine failed. Sync aborted” after attempting to sync and your ACT! / Handheld Contact set up meets one of the following criteria:

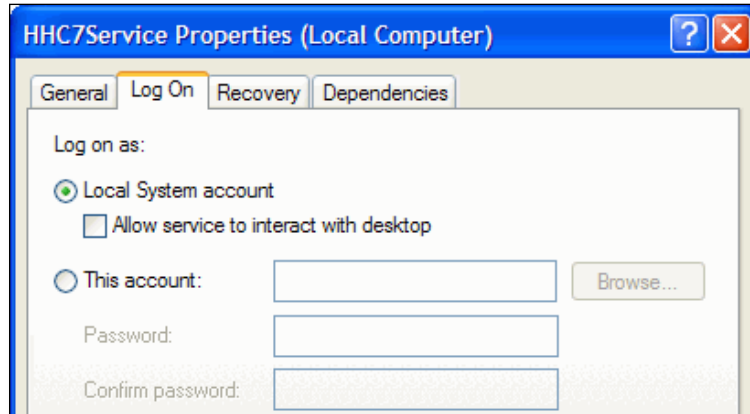
1. Handheld Contact is installed on your desktop computer and you access an ACT! database on another computer either through the Windows network or by using a mapped network drive.
2. Handheld Contact and ACT! are both installed on a server that multiple users can access.

Edit the Handheld Contact service permissions as follows:

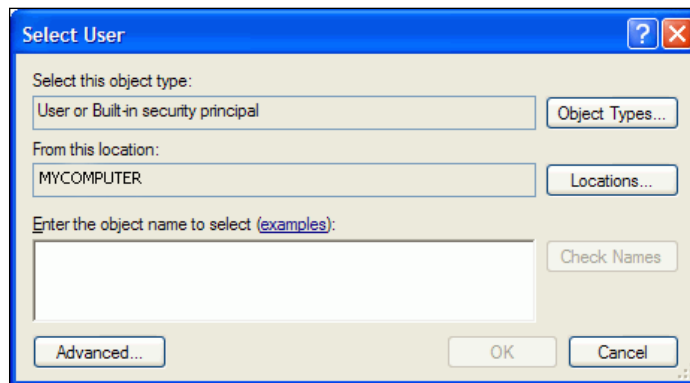
1. From the **Control Panel** select **Administrative Tools** then **Services**.
2. Find **HHC7Service** in the list of services.



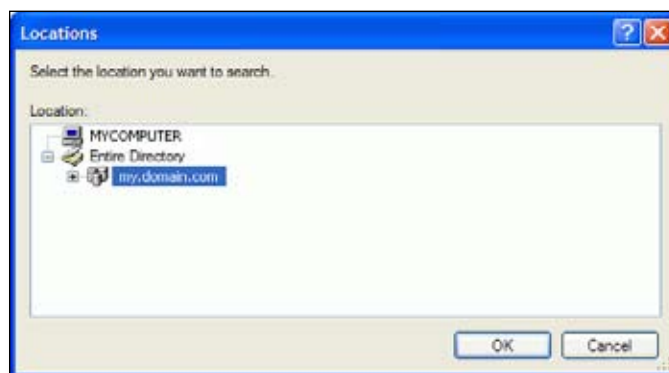
3. Double-click **HHC7Service** to open its properties.
4. Select the **Log On** tab.



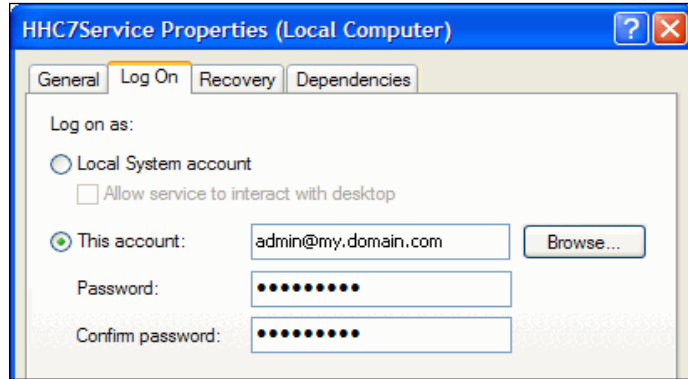
5. Select the radio button beside “**This account**” and press the “**Browse...**” button. The **Select User** window will display.



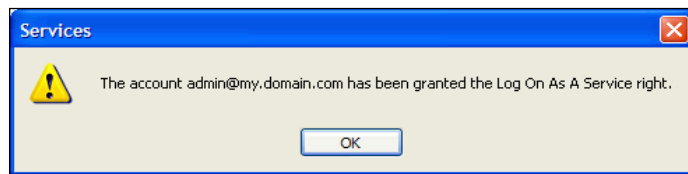
6. Press the “**Locations...**” button. The **Locations** window will display.
7. Select either “**Entire Directory**” or specifically choose the Domain or Workgroup that the computer hosting the ACT! database is on. Press the “**OK**” button return to the **Select User** window.



8. In the textbox enter the name of a user that has administrative rights to the computer hosting the ACT! database. Typically, the network administrator is the best user to enter here. Press the “**Check Names**” button find the user in the directory. Once found, press the “**OK**” button to return to the **Log On** tab.
9. Enter the password for the account selected in the previous step.



10. Press the “OK” button to save your changes. If you were successful you will be notified the account has been granted Log On As A Service rights.



11. Finally, from the list of services **right-click** on the **HHC7Service** and select **Restart**.

## INSTALLING HANDHELD CONTACT ON YOUR BLACKBERRY

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There are three different methods of installing Handheld Contact on your BlackBerry, but for the majority of people the default method of following the instructions automatically sent to your BlackBerry email address will work with ease. Each method is described below listed in the order we recommend trying to install Handheld Contact.

### OTA Installation via Email

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After creating your Handheld Contact account at [www.handheldcontact.com](http://www.handheldcontact.com) an email was sent to the BlackBerry address you entered. This email includes a link that will download Handheld Contact for your BlackBerry as well as all of your account details. This enables Handheld Contact to automatically configure itself rather than prompting you to enter your account details. For this reason, please do not delete this email until you've successfully tested syncing.

1. On your BlackBerry *check your messages* for an email from “Handheld Contact”



2. *Open the message and click the link* to begin downloading Handheld Contact to your BlackBerry

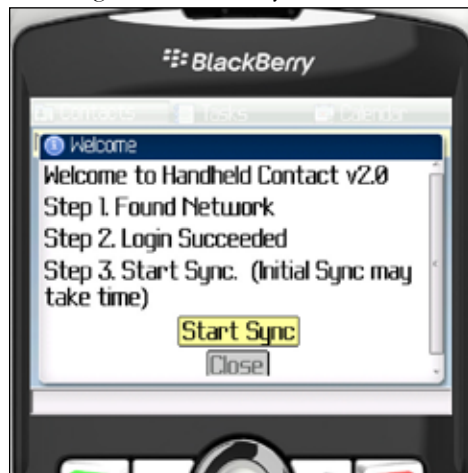


3. After downloading is complete you may be prompted to reboot your

BlackBerry. If so, please reboot before attempting to run Handheld Contact.



4. Ensure that your BlackBerry device's wireless signal turned on and *start* Handheld Contact.
5. Handheld Contact will read your settings from the email you received and automatically configure itself to test syncing.
6. If testing was successful, you'll be asked to begin syncing your contacts.



7. If testing was unsuccessful please ensure that your settings are correct and make any adjustments if necessary. Please refer to the Configuring Handheld Contact on your BlackBerry section to learn about how to manually edit your settings on your BlackBerry.

## Manual OTA Installation

Should the OTA Installation via Email method fail, the next option we recommend Manual OTA Installation. To manually download Handheld Contact to your BlackBerry device please follow these instructions:

1. *Open* your BlackBerry device's **Internet Browser**.
2. Using the browser *visit* <http://www.handheldcontact.com/ota>.



3. Read the instructions shown on your BlackBerry and from the dropdown select if you wish to download Handheld Contact 2.0 or Handheld Contact 1.4. Then, select the Download button and *press your trackball*.
4. Highlight and *click* the **Download** button.



5. After downloading is complete you may be prompted to reboot your BlackBerry. If so, please reboot before attempting to run Handheld Contact.

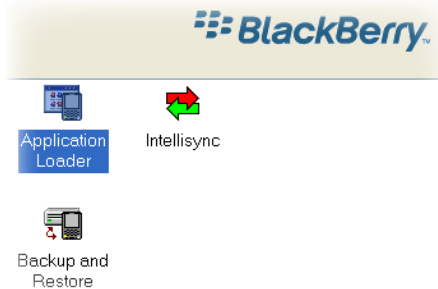


- Please refer to the Configuring Handheld Contact on your BlackBerry section to finish installation.

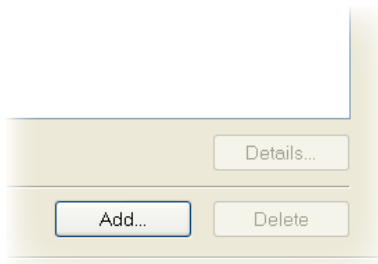
## Desktop Manager Installation

In the very rare instance that neither of the previous methods were possible you may still install Handheld Contact using your BlackBerry device's Desktop Manager software. Please follow these instructions:

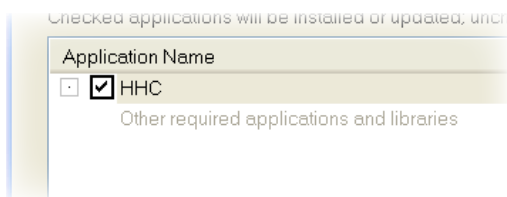
- Visit <http://www.handheldcontact.com/downloads.php> using your desktop computer to download Handheld Contact for your BlackBerry.
- Open the file you just downloaded and *extract* the files. The default location is C:\Program Files\J2X Technologies\HHC Enterprise Edition\Handheld\
- Connect your BlackBerry device to your computer using your USB cable and open the BlackBerry Desktop Manager.
- Start the Application Loader wizard.



- Click the **Add** button and browse to the location you extracted the files to from step 2. Select **HHC.alx**.



- HHC will show up Application Name column. Ensure that there is a checkmark in the box beside it and *click Next*.



- The Application Loader wizard will display a summary of actions. Click **Finish** to install Handheld Contact.
- Please refer to the Configuring Handheld Contact on your BlackBerry section to finish installation.

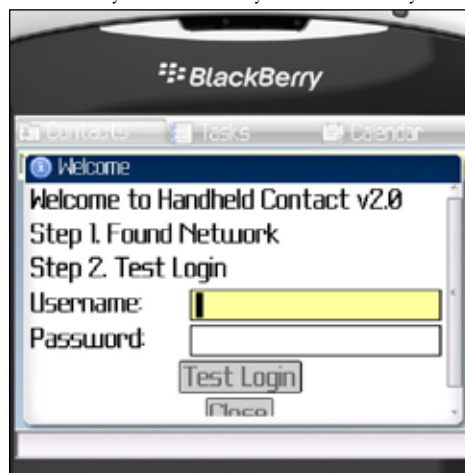
## CONFIGURING HANDHELD CONTACT 2.0 ON YOUR BLACKBERRY

When starting Handheld Contact 2.0 on your BlackBerry for the first time a configuration wizard will ensure your account is set up properly and ready to sync. Please follow these instructions to configure Handheld Contact 2.0 on your BlackBerry:

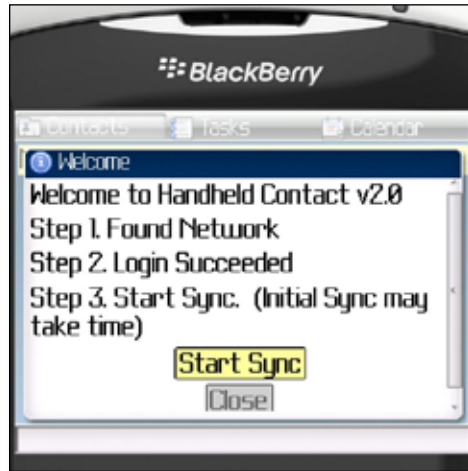
1. Press the **Test Network** button. Handheld Contact will attempt to determine the network settings automatically.



2. Enter your Handheld Contact username and password if these fields are not already automatically filled out for you.



3. Press **Test Login** to ensure that your username and password have been entered correctly.

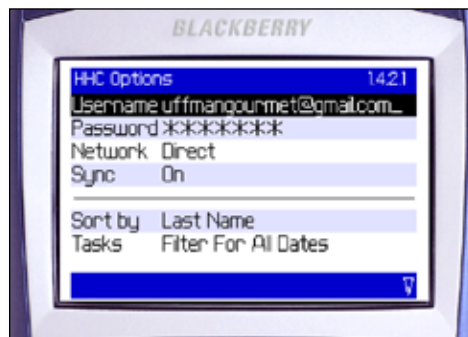


4. After your username and password has been confirmed, press **Sync Now** to begin syncing your database. If you have not yet sent all data from the Handheld Contact console on your ACT! computer, please do so before attempting to sync with your BlackBerry.

## CONFIGURING HANDHELD CONTACT 1.4 ON YOUR BLACKBERRY

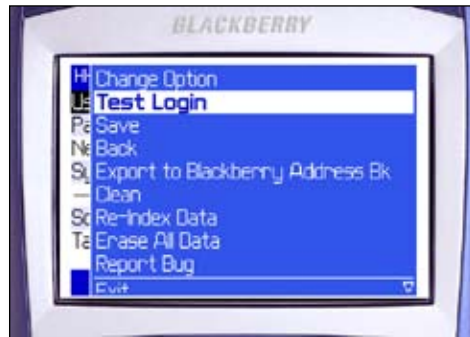
If during installation Handheld Contact 1.4 was not automatically configured or if you just need to change your settings, this section will outline how to modify your settings on your BlackBerry to ensure that Handheld Contact is properly syncing.

1. After starting Handheld Contact *press your trackwheel* to bring display the menu. *Select **Options*** from the menu.
2. Edit each of the fields marked Username, Password, Network, and Sync by highlighting their respective rows and pressing your trackwheel to reveal the menu. In the menu *select **Change Option*** to either enter data or toggle options.



3. *Enter* your Handheld Contact **user name** and **password**. If you do not have a Handheld Contact user name and password please visit [www.handheldcontact.com](http://www.handheldcontact.com) and create an account.
4. Under Network *select your carrier*. If your carrier is not listed please refer to [this knowledgebase article](#). If you use a BES (BlackBerry Enterprise Server) *select **Direct***.
5. *Press your trackwheel* to reveal the menu and *select **Test Login***. If login was successful please *toggle the Sync option from Off to On*. If login was unsuccessful please ensure that you have correctly entered your Handheld

Contact user name and password and chosen the correct setting for Network.



6. Once your settings have been edited *press your trackwheel* again to reveal the menu and *select Save*.

Congratulations! You're ready to sync ACT! with your BlackBerry device.

## INSTALLING HANDHELD CONTACT ON YOUR POCKET PC OR TREO

There are two different ways to install Handheld Contact on your Pocket PC or Treo running Windows Mobile. Which method you choose depends on whether you have Microsoft ActiveSync installed on your desktop computer or not. If you are using Windows Vista or do not have Microsoft ActiveSync installed please skip the ActiveSync Installation section and skip to the OTA Installation section.

### ActiveSync Installation

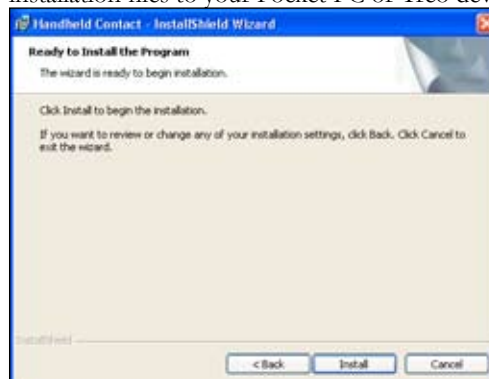
Handheld Contact can be installed on your Pocket PC or Treo device with Microsoft ActiveSync. If you have not yet installed Microsoft ActiveSync please use the CD that came with your device or download it from the Microsoft website.

Follow these steps to install Handheld Contact on your Pocket PC or Treo device:

1. Using the cable that came with your Pocket PC or Treo device, *connect the device to your computer.*
2. Wait for Microsoft ActiveSync to indicate that the device is **Connected** and **Synchronized**.



3. Visit <http://www.handheldcontact.com/downloads.php> using your desktop computer to download Handheld Contact for your Pocket PC or Treo device.
4. Open the file you just downloaded to begin installation.
5. Follow the directions in the installation wizard to begin transferring the installation files to your Pocket PC or Treo device.



6. Handheld Contact will begin to install on your Pocket PC or Treo device.



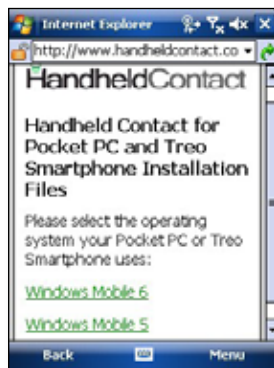
7. If prompted by your Pocket PC or Treo device to reboot after installation, *select OK* to reboot.
8. Close the installation wizard on your desktop computer.

## OTA Installation

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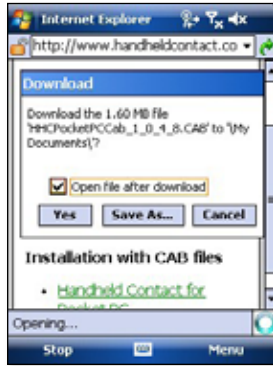
Handheld Contact can be installed on your Pocket PC or Treo device by downloading the installation files over-the-air. Windows Vista users will need to use this method of installation. Install Handheld Contact as follows:

1. From the **Start** menu *select Internet Explorer*
2. Using Internet Explorer *visit* <http://www.handheldcontact.com/wm>
3. From the list of Windows Mobile Operating Systems select the one that your handheld device is using.



If you're unsure which version of Windows Mobile you're using select **Start, Settings, System** Tab, and select the **About** icon.

4. Windows Mobile 5:
  - Scroll down to the section labeled **Installation with CAB files**.
  - Select the first link in the list of installation packages.
  - From the download confirmation dialog ensure that **Open file after download** is *checked* and *press* the **Yes** button.

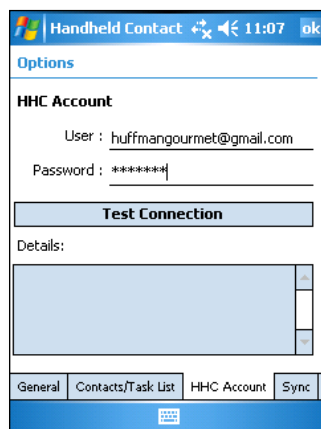


- After installation of the package *select* the **next installation package** in the list.
  - Continue installing all of the packages until all 4 are installed.
5. Windows Mobile 6:
    - Scroll down to the section labeled **Installation with CAB files**.
    - Select the **Handheld Contact for Pocket PC** link.
    - From the download confirmation dialog ensure that **Open file after download** is *checked* and *press* the **Yes** button.
  6. From the **Start** menu *select* **Programs**
  7. Select the **Handheld Contact** icon.

## CONFIGURING HANDHELD CONTACT ON YOUR POCKET PC OR TREO

After successfully installing Handheld Contact on your Pocket PC or Treo device you must configure Handheld Contact to sync your ACT! data. Configure Handheld Contact as follows:

1. On your Pocket PC or Treo device *select* **Programs** from the **Start Menu**.
2. Click the **Handheld Contact icon** to start Handheld Contact for the first time.
3. Enter your Handheld Contact **username** and **password** using the Pocket PC or Treo device keypad.



4. Select **Test Connection** to verify that the username and password has been entered accurately and that the device is ready to sync.
5. After successfully validating your Handheld Contact account, using the stylus *select* the **General** tab.
6. Enter your **Area Code** and *select* your **Country/Region** from the drop

down menu.

7. Using the stylus *tap* the **OK** button in the top right corner of the screen.