HandheldContact

User Manual for Version 2.1

J2X TECHNOLOGIES INC

Contents

Introduction **1**

1.0 Getting Started **2**

1.1 Downloading the Computer Application **2**

1.2 Installing the Computer Application **2**

1.3 The Handheld Contact Console **3**

1.4 Customizing the User Accounts Table **3**

1.4.1 Add or Remove Columns in the User Accounts Table 3
1.4.2 Changing the Order of Columns in the User Accounts Table 4

2.0 Database Management **5**

2.1 Changing a Database's Settings **5**

2.1.1 Changing Settings for Syncing 5

2.2 Removing a Database **7**

3.0 User Management **8**

3.1 Adding a New User **8**

3.1.1 Step 1 – Selecting a Database to Sync 8
3.1.2 Step 2 – Selecting the ACT! User 8
3.1.3 Step 3 – Entering the Handheld Contact Account 8
3.1.4 Step 4 – Selecting Sync Settings 9
3.1.5 Step 5 – Selecting Contacts to Sync 9
3.1.6 Step 6 – Selecting Activities to Sync 10
3.1.7 Step 7 – Selecting Note/Histories to Sync 11
3.1.8 Step 8 – Setting Rules for field mapping 12

3.2 Adding Multiple Users **15**

3.2.1 Step 1 – Selecting a Database to Sync 15
3.2.2 Step 2 – Adding Users 15
3.2.3 Step 3 – Assigning Sync Profiles to Each User 16

3.3 Changing a User's Settings **18**

3.4 Advanced Auto-Sync Group Settings **18**

3.5 Finding a User **19**

3.6 Removing a User **20**

4.0 Profile Management **21**

4.1 Creating a Profile **21**

4.2 Changing a Profile **23**

4.3 Adding Users to a Profile **23**

4.4 Moving Users to a Different Profile **23**

4.5 Removing a Profile **24**

5.0 Sync Data Management **25**

5.1 Customizing Sync Schedule **25**

5.2 Resending All Data to User(s) **25**

Note: If a user is associated with a profile, that user's account settings can also be changed by making changes to the profile the user is associated with — though changes to a profile are reflected in all users associated with that profile. For more on making changes to a profile, see "4.2 Changing a Profile".

5.3 Erasing All Data from a User's Handheld Device 26

5.4 Manually Forcing Syncing 26

5.4.1 Manually Force Syncing for a Single User 26
5.4.2 Manually Force Syncing for Multiple Users 26

5.5 Disabling Auto Syncing 27

6.0 Email Alerts Management 28

6.1 Email Settings 28

6.2 Error Alerts 28

6.3 Status Alerts 29

6.4 Upgrade Alerts 30

7.0 Options 32

7.0.1 Modifying Sync Server URL 32
7.0.2 Storing Log Files 32
7.0.3 Adding an HHC Administrator Password 32
7.0.4 Changing the HHC Administrator Password 32
7.0.5 Upgrade Notifications 33

8.0 Estimating the Size of a User's Sync Data 34

9.0 Accessing your Account Online 35

9.1 Checking User Statistics 35

9.2 Changing your Handheld Contact Password 35

9.3 Updating your Account Information 36

9.4 Sending an OTA Installation Link to your Handheld Device's Inbox 36

10.0 Configuration Files 37

10.1 Saving Configuration Files 37

10.2 Loading Configuration Files 37

11.0 Support 38

Index 39

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 2.1 Installation Guide which is available at www.handheldcontact.com/downloads.php.

This user manual details the functions and features of the Handheld Contact computer application.

1.0 Getting Started

Before you begin using Handheld Contact, you must first acquire and install the Handheld Contact computer application which allows you to configure sync settings and manage Handheld Contact users and ACT! databases.

The Handheld Contact computer application is available on CD or via download online at www.handheldcontact.com/downloads.php.

1.1 Downloading the Computer Application

If you do not possess a copy of the Handheld Contact program on CD, you must download it from Handheld Contact's web site. The Handheld Contact computer application is available for download at www.handheldcontact.com/downloads.php. Download the Handheld Contact computer application as follows.

1. From the www.handheldcontact.com/downloads.php web page, click the **Computer Application icon** corresponding to the version of ACT! you are using.
    - The *File Download window* appears as well as a Security Warning asking you whether you would like to run or save the file you are about to download.
2. Click **Save** and save the file to your desktop.
3. Once the file download is complete, click **Run** to start the *Installation Wizard* right away or wait to install the application later.

1.2 Installing the Computer Application

Handheld Contact for your computer must be installed while logged on to Windows as a user with administrative privileges. If your Windows account does not have administrative privileges, ask your IT administrator to install the application. Install the Handheld Contact computer application as follows.

1. The *Installation Wizard* appears automatically if you chose to run the Handheld Contact computer application directly after downloading it. If you downloaded Handheld Contact at a previous time, double-click the **Handheld Contact Setup Launcher icon** you saved on your desktop when you downloaded the application. If you received Handheld Contact on CD, the installation procedure should begin automatically after inserting the CD.
    - The *Installation Wizard* opens and prompts you to begin the installation process.
2. Click **Next** to begin installing the Handheld Contact computer application.
3. Click **Browse** to specify a location for the installation of Handheld Contact or use the default location. Click **Next** once you have selected a location.
4. Click **Install** to begin installing the application.
    - Handheld Contact configures your new software installation.
5. Click **Finish** to complete your installation.

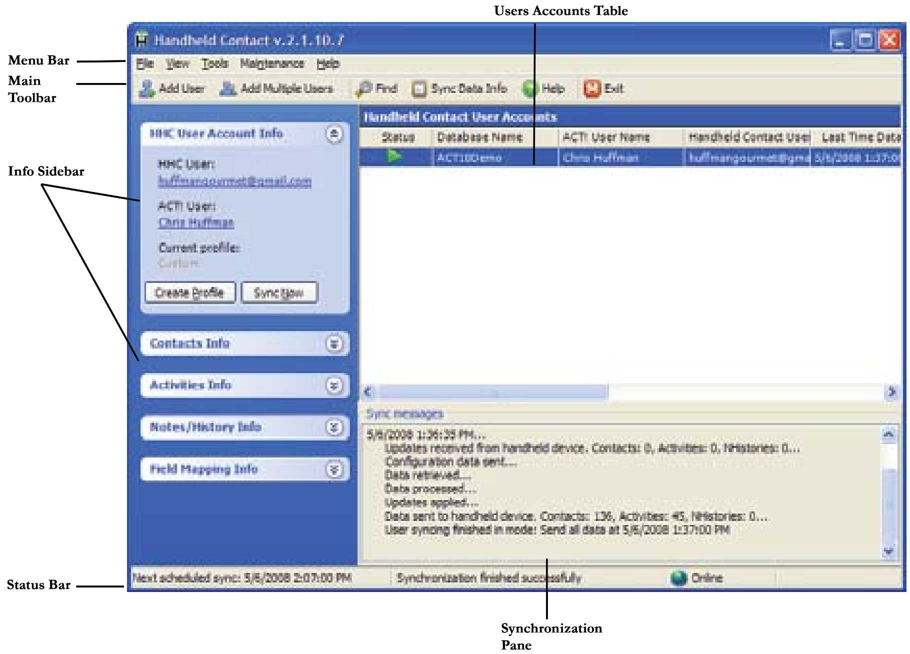
Note: Do NOT run Handheld Contact if you are not logged on to Windows under the account that will be the primary user of Handheld Contact. If you had to ask someone to log on to Windows as Administrator to install Handheld Contact, ask them to log off and then log on to Windows with the primary user's account before running Handheld Contact for the first time.

1.3 The Handheld Contact Console

On first run, the *Add User Wizard* will automatically launch and must be completed. For help with using the *Add User Wizard* please follow the instructions in 3.1 Adding a New User. If you wish to password protect Handheld Contact please follow the instructions in 7.0.3 Adding an HHC Administrator Password.

The Handheld Contact computer application opens and appears as in Figure 1A.

Figure 1A - Handheld Contact main screen



1.4 Customizing the User Accounts Table

The *User Accounts Table* displays information about each user added in Handheld Contact including the user's ACT! user name, Handheld Contact user name, status, and user statistics. Handheld Contact allows you to customize the information that appears in the *User Accounts Table* and the order in which that information appears.

1.4.1 Add or Remove Columns in the User Accounts Table

Add or remove columns in the *User Accounts Table* as follows.

1. From the View menu, select **Customize Columns…**.
    - The *Customize Columns window* appears. By default all available fields which can be set as columns in the *User Accounts Table* are already set to display.
2. Select the name of any field you would like to remove from the *User Accounts Table* in the *Displayed fields list* and click **Remove**.
    - The name of the selected field appears in the *Available fields list* and is removed from the *User Accounts Table*.

3. Select the name of any field you would like to add to the *User Accounts Table* in the *Available fields list* and click **Add**.
    - The selected field appears in the *Displayed fields list* and is added to the *User Accounts Table*.
4. Click **OK** to close the *Customize Columns window*.

1.4.2 Changing the Order of Columns in the User Accounts Table

Change the order of the columns in the *User Accounts Table* as follows.

1. From the View menu, select **Customize Columns…**.
    - The *Customize Columns window* appears.
2. Select the name of any field you would like to move within the *User Accounts Table* in the *Displayed fields list* and click **Move Up** or **Move Down.**
3. Repeat 2 until the fields are listed in the order you want them to appear from left to right in the *User Accounts Table*.
4. Click **OK** to close the *Customize Columns window*.
    - The columns in the *User Accounts Table* are arranged in the order you specified.

2.0 Database Management

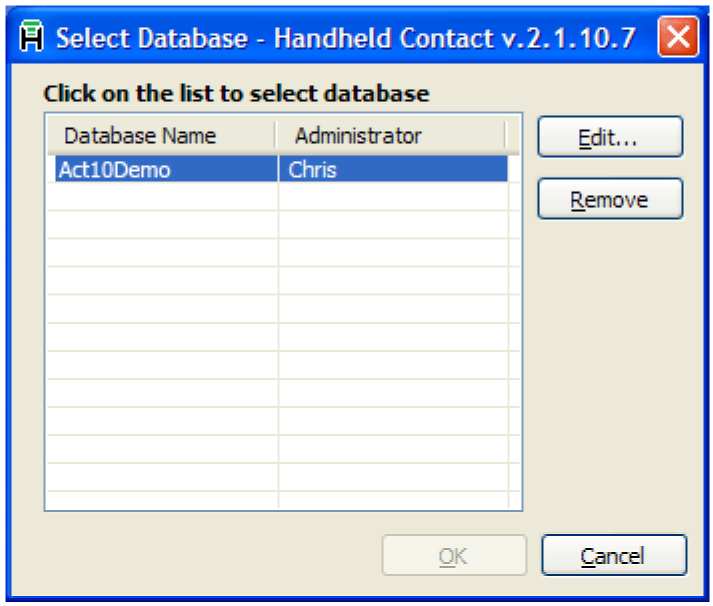
In order for the Handheld Contact service to enable syncing between your handheld device and your ACT! database, you must designate the ACT! database(s) used for syncing.

Note: Databases are added using the *Add User Wizard*. For help with using the Add User Wizard please follow the instructions in 3.1 Adding a New User.

Databases are modified, and removed using the *Select Database window* (see Figure 2A). Access the *Select Database window* as follows.

1. In the Tools menu, select **Manage** > **Databases….**
   - The *Select Database window* appears.

Figure 2A - The Select Database window



2.1 Changing a Database's Settings

Handheld Contact allows you to specify settings for syncing between your ACT! database and your handheld device. Edit sync settings for an ACT! database as follows.

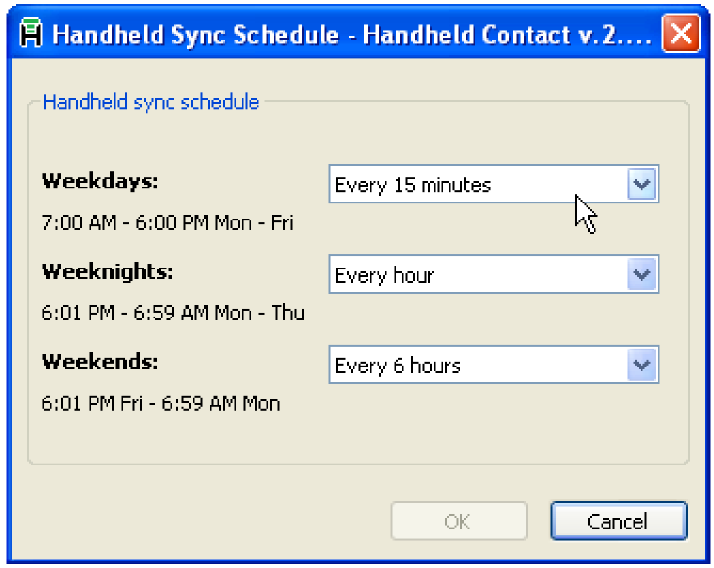
1. In the *Select Database window,* highlight the database you want to change and click **Edit….**
   - The *Database Summary window* appears.

2.1.1 Changing Settings for Syncing

Syncing, short for synchronizing, refers to the process of coordinating newly added or modified data between your ACT! database and your handheld device. Handheld Contact syncs wirelessly and allows you to define settings for when and how often it does. Change your sync settings as follows.

1. If you want to set up Handheld Contact so that when data is deleted from a user's handheld, the data is also deleted from the selected ACT! database, select the *When deleting from handheld, DELETE from ACT! check box.*
2. In the *Handheld sync schedule summary pane* of the *Database Summary window*, click **Change….**
   - The *Handheld Sync Schedule window* appears (see Figure 2C).

Figure 2C - The Handheld Sync Schedule window



2. From the *Weekdays list*, select how often you want to enable syncing with the selected ACT! database from 07:00 AM to 6:00 PM Monday to Friday.
3. From the *Weeknights list*, select how often you want to enable syncing with the selected ACT! database from 6:01 PM to 6:59 AM Monday to Thursday.
4. From the *Weekends list*, select how often you want to enable syncing with the selected ACT! database from 6:01 PM Friday to 06:59 AM Monday.
5. Click **OK**.
    - The *Handheld Sync Schedule window* closes and returns you to the *Database Summary window*.
6. Click **OK** to exit the *Database Summary window*.
    - The *Database Summary window* closes and returns you to the *Select Database window*.
7. Click **OK** to exit the *Select Database window*.

2.2 Removing a Database

If you have a database that you no longer wish to use for syncing, you can remove it from the Handheld Contact computer application. Remove a database as follows.

Note: Removing a database which is set up to sync for Handheld Contact user accounts also removes the user accounts that are set up for syncing with that database. Do not remove the database if you do not want to delete the user accounts set up for syncing with the database.

1. In the Tools menu, select **Manage** > **Databases...**.
    - The *Select Database window* appears.
2. In the *Select Database window,* highlight the database you want to remove.
3. Click **Remove**.
    - A message appears asking you to verify that you want to remove the database.
4. Click **Yes** to remove the database.
    - The database is removed.
5. Click **OK** to exit the *Select Database window*.

3.0 User Management

Just as different people within an organization use ACT! databases to keep track of different contacts, activities, notes, and histories, different Handheld Contact users have different syncing needs. The ability to manage users allows for an administrator to set different sync rules for different Handheld Contact users as necessary. In other words, it is possible to select specific portions of an ACT! database for syncing. Whether you are a solitary Handheld Contact user or one of many in your company, user management allows you to customize the information that gets synced between your ACT! database and your handheld device.

Users are managed from the *User Accounts Table*.

3.1 Adding a New User

In order for Handheld Contact to sync an ACT! database with any Handheld device, you must first set up Handheld Contact user accounts for each handheld device you want to sync with by adding new users.

The *Add User Wizard* allows you to add individual new users in Handheld Contact. Access the *Add User Wizard* as follows.

Note: Multiple new users can be added at once using the *Add Multiple Users Wizard*. For information on the *Add Multiple Users Wizard*, see "3.2 Adding Multiple Users".

1. Click **Add User** on the main toolbar or, from the Tools menu, select **Manage** > **Users** > **Add…**.
    - The *Add User Wizard* appears.

3.1.1 Step 1 – Selecting a Database to Sync

Because Handheld Contact syncs data between an ACT! database and a user's handheld device, you must select an ACT! database to sync with a user's handheld device in the process of adding a user. Select a database to sync as follows.

Note: If at any point you would like to return to a previous step in the *Add User Wizard*, click **Back**. To exit the *Add User Wizard* without having your changes take effect, click **Cancel**.

1. Click the name of the database you wish to use in the *ACT! Database(s) list*, or if the database you wish to use is not in the list, click **Browse…** to find the database on your computer.
2. *Enter* an **administrator user name and password** for the selected database.
3. C*lick* **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.

3.1.2 Step 2 – Selecting 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.

3.1.3 Step 3 – Entering 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.

3.1.4 Step 4 – Selecting 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).

3.1.5 Step 5 – Selecting Contacts to Sync

One of the primary functions of Handheld Contact is to sync ACT! contacts between your computer and your handheld device. The Add User Wizard allows you to specify the criteria by which Handheld Contact will determine which of your ACT! database contacts to sync to your handheld device. You can choose either to sync all of your ACT! contacts or to select which contacts to sync on the basis of the groups and subgroups into which they are organized in ACT!.

1. If your database consists of less than 2500 contacts and you want Handheld Contact to sync all of your ACT! contacts, select the *Synchronize all available contacts check box*, otherwise pick and choose which contacts Handheld Contact syncs by selecting the *Synchronize contacts in groups check box* and then select the check boxes next to the contact groups and subgroups you want to sync. Click the plus sign next to a Contact Group to expand it and reveal its subgroups (see Figure 3B).
2. By default, any contacts you create later on your handheld device will automatically be sorted into the auto-sync group of your ACT! database. If you would like to sort new contacts into a different group, ensure that the check box next to that group is selected and click **Change group…**.
    - A window appears prompting you to select a group for contacts to be sorted into once you add them on your handheld device (see Figure 3C).
3. Select the group you would like new contacts to be sorted into and click **OK**.
    - The *Add contacts created on handheld to field* now contains the name of the contact group you selected.
4. Selecting **Advanced…** allows you to enable Handheld Contact to sync activities for specific ACT! database users, activities with a specific status, or activities which fall within a specific date range. The *Advanced window* also offers the opportunity to see an estimated data size for the information you have selected for Handheld Contact to sync between your ACT! database and your handheld device based on the criteria you have specified. This is available by clicking **View details**.
5. Click **Next** to continue.

Note: Handheld Contact automatically creates an auto-sync group of contacts who are associated with entries in your ACT! calendar. As the auto-sync group is mandatory and cannot be deselected, the auto-sync contacts are not included in any other group.

Figure 3B - Synchronizing contacts in groups

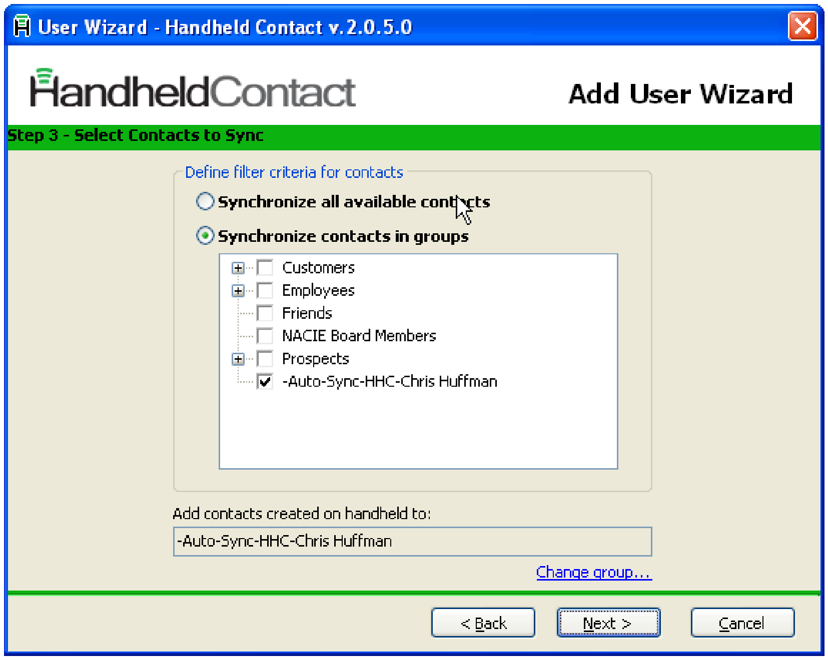


Figure 3C - Select Groups for Contacts Added on Handheld window

3.1.6 Step 6 – Selecting Activities to Sync

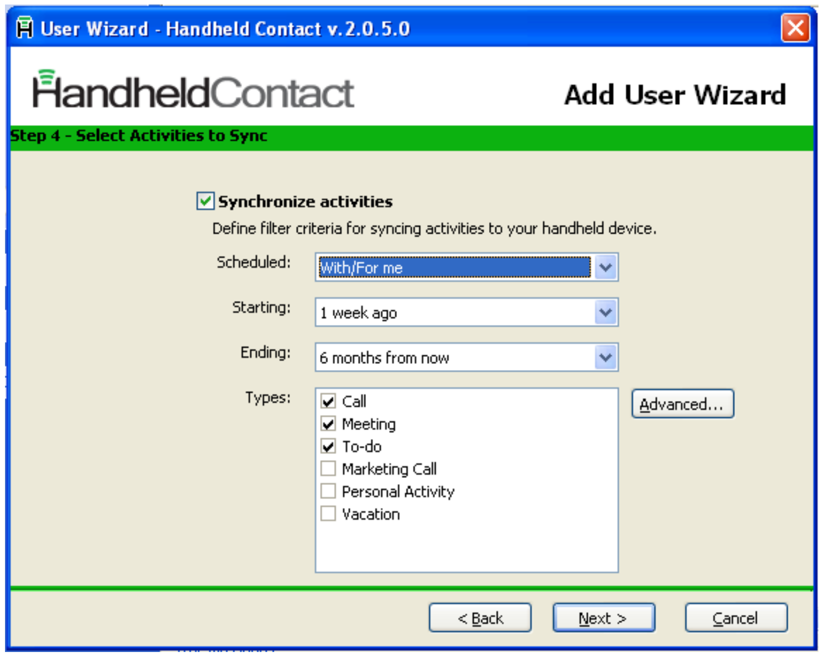
On top of syncing contacts, Handheld Contact also enables syncing of activities between your ACT! database and your handheld device. This step of the *Add User Wizard* allows you to specify the criteria that determines which of your activities to sync between your ACT! database and your handheld device.

If you do not want Handheld Contact to sync activities, deselect the *Synchronize activities check box* and click **Next**.

If you choose to enable syncing of activities, do so as follows.

1. Ensure that the *Synchronize activities check box* is selected.
2. You can specify which activities you want Handheld Contact to sync by selecting an option from the *Scheduled list* and a time frame from the *Starting* and *Ending lists* (see Figure 3D).

Figure 3D - Specifying which activities to sync



3. Select the check box next to each type of activity you want Handheld Contact to sync.
4. Click **Next** to continue.

3.1.7 Step 7 – Selecting Note/Histories to Sync

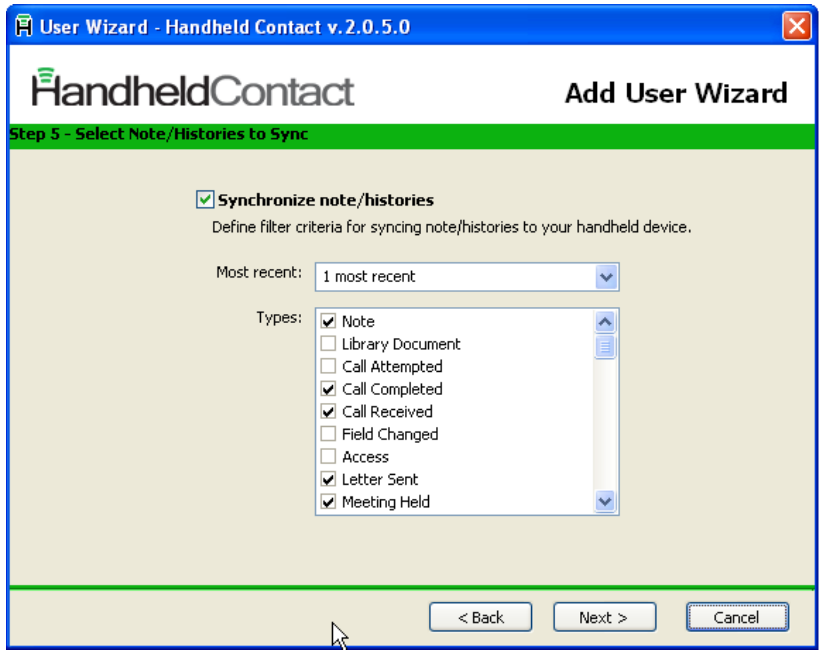
Handheld Contact also allows you enable syncing of contact notes and histories between your ACT! database and your handheld device. As with contacts and activities, the *Add User Wizard* allows you to specify the criteria by which Handheld Contact determines which notes and histories to sync.

Syncing of notes and histories as disabled by default. If you do not want to enable syncing of notes and histories, click **Next**.

If you choose to enable syncing of contact notes and histories, do so as follows.

1. To enable note/history syncing, select the *Synchronize note/histories check box* (see Figure 3E).
2. You can select how many recent note/histories to sync for each contact by selecting a number from the *Most recent list*.
3. You can also specify the types of note/histories to sync by selecting the check boxes next to each type of note/history you would like Handheld Contact to sync.
4. Click **Next** to continue.

Figure 3E - Enabling note/history syncing

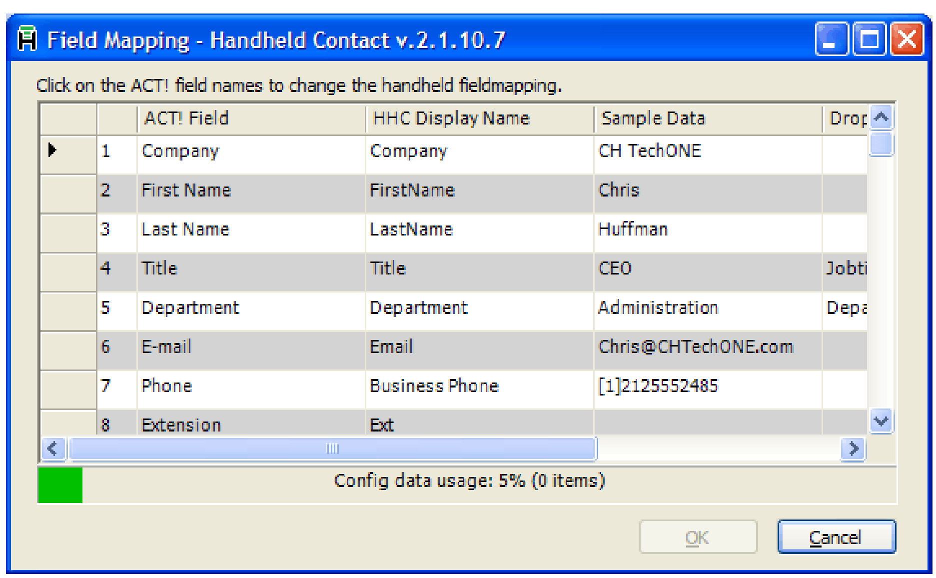


3.1.8 Step 8 – Setting Rules for field mapping

Field mapping involves the matching of fields between an ACT! database and an individual user's handheld devices. Handheld Contact allows you to map up to 72 fields, 27 of which are pre-defined. Each of the 27 pre-defined fields can be set to map or not to map. By contrast, each of the 48 user-defined fields are set not to map by default though you can set these fields to map any number of custom or existing ACT! fields. Set field mapping rules as follows.

1. In the *Field mapping summary pane* click **Edit Field Mapping…**.
   - The *Field Mapping window* appears containing a seven-column table. Scroll to view columns that aren't displayed (see Figure 3G).

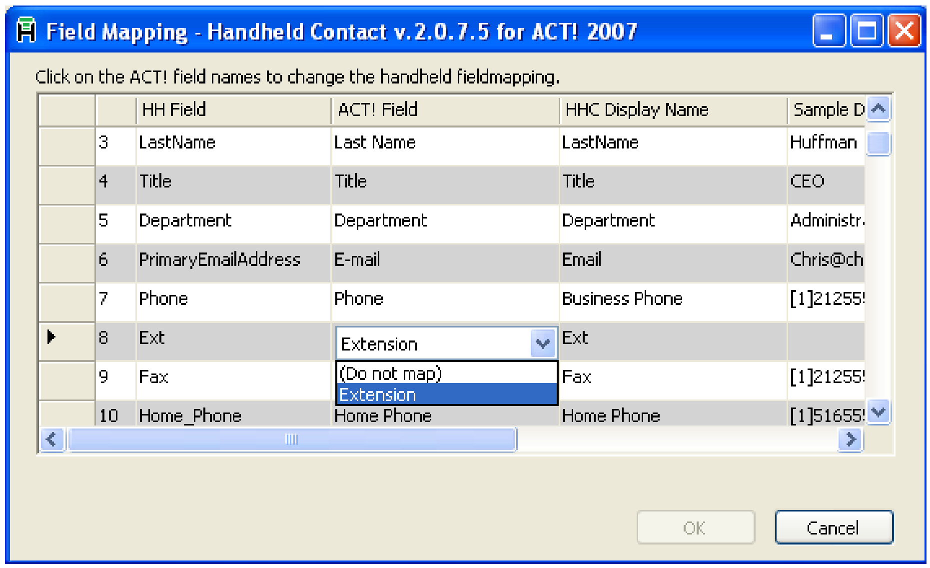
Figure 3G - The Field Mapping window



- Each row of the table corresponds to a field that can be mapped between the selected ACT! database and users' handheld devices.
- In the *ACT! Field column,* any entry reading "Do not map" indicates a field that is not set to map.

2. Click the *ACT! Field column* entry for the field you want to map.
   - A drop-down list appears.
3. Click the arrow to expand the drop-down list.
   - The drop-down list expands revealing a *Do not map item* and one or more *ACT! database field name items* (see Figure 3H).

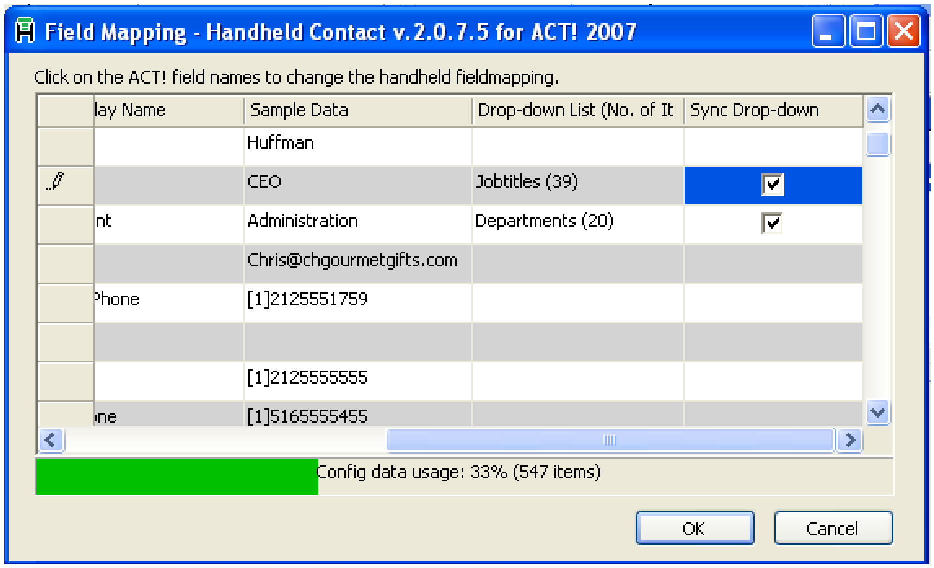
Figure 3H - The ACT! Field column of the Field Mapping Window



4. Select an *ACT! Database field name item* from the drop-down list to map the field. Select *Do not map* to set the field not to map.
5. For each field you have set to map, click in the field's *HHC Display Name column* entry and type the name of the field as you would like it to appear on your handheld device.
6. If the field from your ACT! database that is specified in the *ACT! Field column* contains a drop-down list in ACT!, the *Drop-down List column* displays the name of that list with the number of list items in parentheses. If an entry exists in the *Drop-down List column*, click the check box in the *Sync Drop-down column* to sync the menu as for the mapped field (see Figure 3I).
7. Repeat 1-6 for each field you want to set.
8. Click **OK**.
   - The *Field Mapping window* closes and returns you to the *Field Mapping Summary*.
9. Click **Finish**

Tip: Do not sync long drop-down lists which are very long as they will consume a significant portion of the space available for syncing data. In the event that you come close to exceeding the amount of space available for syncing, the *Config Data Usage bar* at the bottom of the *Field Mapping window* turns red.

Figure 3I - The Sync Drop-down column of the Field Mapping window



3.2 Adding Multiple Users

As a time-saving feature, Handheld Contact allows an administrator to add more than one user account at the same time using the *Add Multiple Users Wizard*. Access the *Add Multiple Users Wizard* as follows.

Note: Adding multiple users requires that you create a profile which can be assigned to each user you want to add. You can add multiple users with different profiles at the same time, but you cannot add multiple users without assigning each a profile. For information on adding a user without assigning the user a profile, see "3.1 Adding a New User". Profiles are created using the *Profile Editor*, which can be opened from step 3 of the *Add Multiple Users Wizard*. For detailed information on creating profiles, see "4.0 Profile Management".

1. On the main toolbar, click **Add Multiple Users**.
    - The *Add Multiple Users Wizard* appears.

3.2.1 Step 1 – Selecting a Database to Sync

You must first select a database for syncing to which the users you plan to add have access.

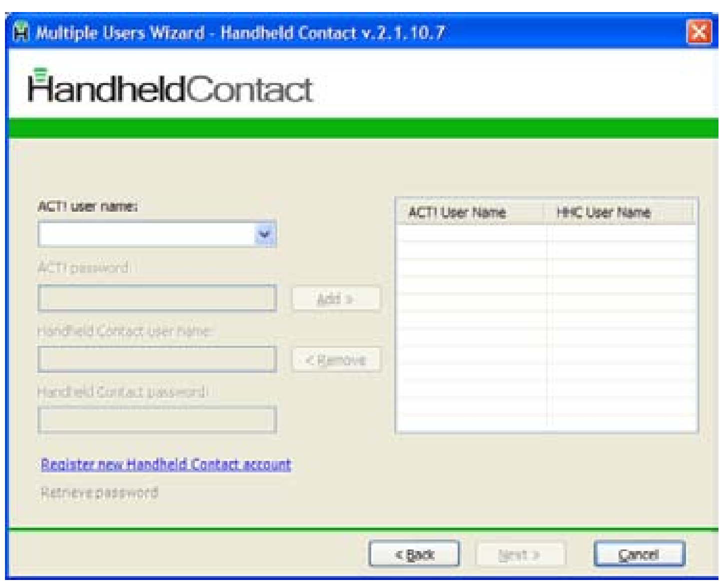
1. Click the name of the database you wish to use in the *ACT! Database(s) list*, or if the database you wish to use is not in the list, click **Browse…** to find the database on your computer.
2. *Enter* an **administrator user name and password** for the selected database.
3. *Click* **Next** to verify 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.

3.2.2 Step 2 – Adding Users

In order to add multiple users, you must have each user's Handheld Contact user name and password as well as each user's ACT! user name and password on hand.

1. Select the name of the user you want to add from the *ACT! user name list* and enter the user's password in the *ACT! password field*.
2. Enter the user's Handheld Contact user name and password in the *Handheld Contact user name field* and *Handheld Contact password field* respectively.
3. Click **Add**.
    - The name of the user you want to add appears in the *Multiple Users Table* (see Figure 3J).

Figure 3J - User's name in the Multiple Users Table



Note: To remove a user from the *Multiple Users Table*, highlight the user name in the *Multiple Users Table* and click **Remove**.

4. Repeat 1-3 for each additional user you want to add.
5. Once all desired users have been added, click **Next** to go to Step 3 of the *Add Multiple Users Wizard*.

3.2.3 Step 3 – Assigning Sync Profiles to Each User

Note: You must assign a profile to each user you want to add using the *Add Multiple Users Wizard*, though it does not have to be the same profile for each user.

Each user will be applied default settings initially. If you wish to edit sync settings later or default settings are acceptable, *click* **Finish** to complete the *Add Multiple Users Wizard*. Otherwise, assign a sync profile to all or some Handheld Contact users. Sync profiles are created using the *Profile Editor* which can be opened by clicking Create profile in the bottom left hand corner. For detailed information on creating profiles, see "4.1 Creating a Profile".

Once you have created a profile to assign to users, assign it as follows.

1. Click the *Sync Profile column* of the *Assign Sync Profiles Table* in the row of the user to whom you want to assign a profile.
    - The *Sync Profile drop-down list* appears. (See Figure 3K).
2. Select the profile you want to assign to the user from the *Sync Profile drop-down list*. (See Figure 3L). To revert to default settings *click* the **checkbox** in the *Default Settings Column*.
3. Select the *Private Data check box* in the same row as each user for whom you want to sync data flagged as private in ACT!.
4. Click **Finish**.
    - The *Add Multiple Users Wizard* closes and the newly added users' information appears in the *User Accounts Table* (see Figure 3M).

Figure 3K - Accessing the Sync Profile drop-down list

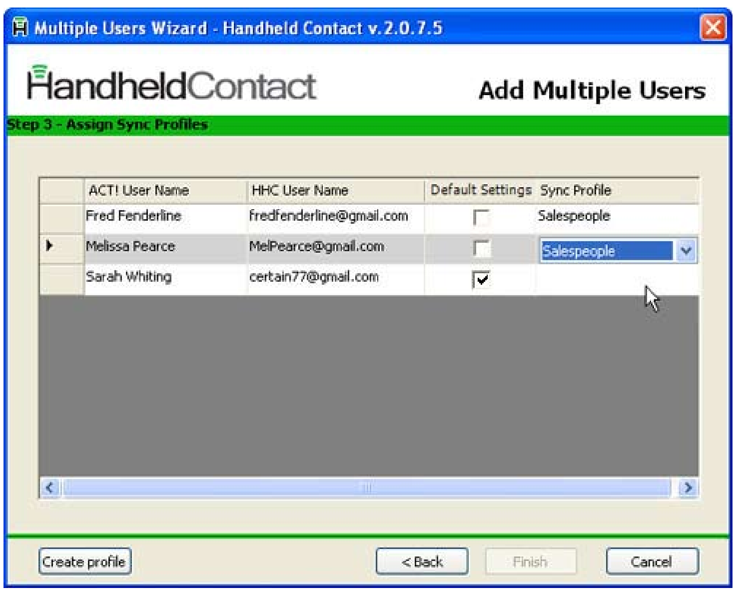


Figure 3L - Selecting a profile from the Sync Profile drop-down list

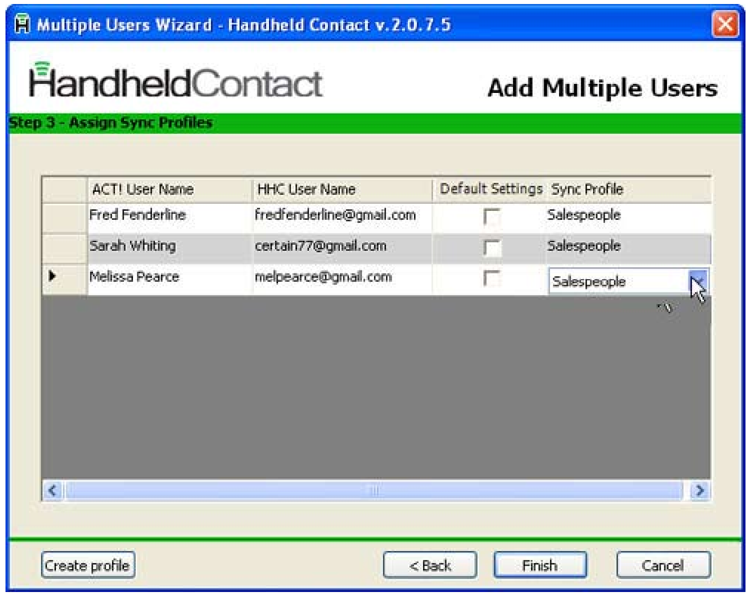
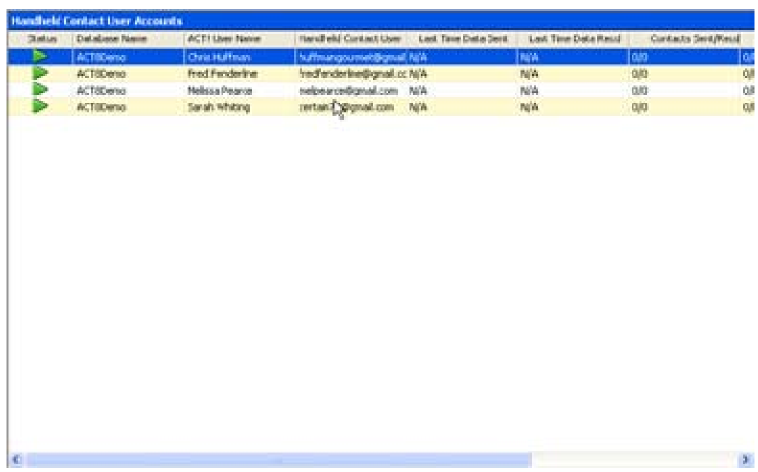


Figure 3M - Multiple new users in the User Accounts Table

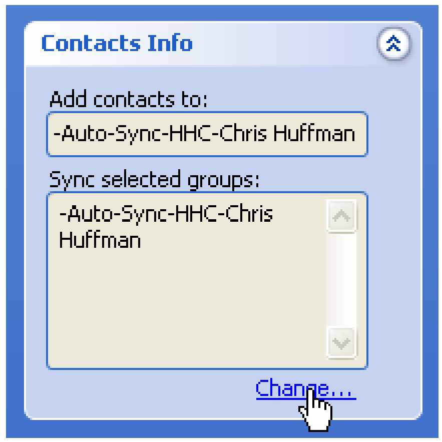


3.3 Changing a User's Settings

Sometimes it is necessary to change the settings of an existing user.

Highlight the user's account in the *User Accounts Table* and then click **Change…** in any of the info panes on the *Info Sidebar*. This method works for user accounts regardless of whether or not they are based on a profile (see Figure 3N).

Figure 3N - Changing a User Account's settings using the panes in the Info Sidebar



Note: If a user is associated with a sync profile, changing the user's settings will disassociate the user from that sync profile. As a result, future changes to the sync profile will not affect that user. To change an existing sync profile, see "4.2 Changing a Profile".

Note: If the double arrow is pointing upwards, the info pane is already expanded.

1. On whichever of the *HHC User Account Info*, *Contacts Info*, *Activities Info*, *Note/Histories Info,* or *Field Mapping Info panes* that corresponds to the sync criteria you want to change, click the arrow to expand the info pane.
2. Click **Change…** in the bottom left-hand corner of the pane.
   - The *Change User Account Settings window* appears for the info pane you want to change.
3. Make your desired changes and click **OK**.
   - The *Change User Account Settings window* closes.

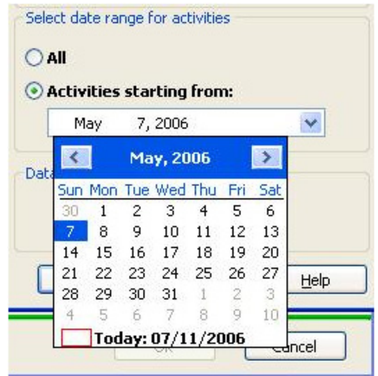
3.4 Advanced Auto-Sync Group Settings

The auto-sync group settings allow you to customize the ACT! information that will be synchronized to your handheld. Settings are available for ACT! users, activity status, and activity date ranges. The advanced setting form also allows you to display detailed information about the ACT! data being synchronized to the handheld.

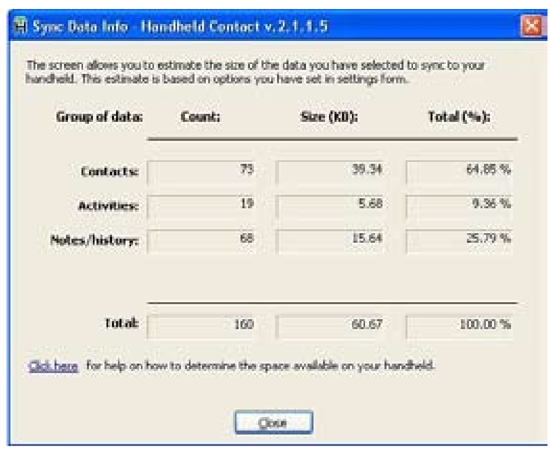
Access the Advanced Auto-Sync Group Settings as follows.

1. Highlight the user's account in the *User Accounts Table* and then click **Change…** in *Contacts Info* pane on the *Info Sidebar*.
2. *Click* the **Advanced** button.
   - The *Advanced Auto-Sync Group Settings* window opens
3. By default *Always sync contacts created by HHC* is enabled. If you wish to have all contacts created on the handheld device to be included in future syncing leave this option as is. Otherwise, you may choose to exclude them by changing this setting.
4. By default, contacts found in all activities will be included in the auto-sync group. However, you may choose to exclude contacts found in cleared activities by *clicking* the **radio button** next to *Exclude CLEARED activities*.
5. By default, contacts found in all activities will be included in the auto-sync

group You may also select a starting date to limit activities that will be searched to build the auto-sync group. Selecting a start date decreases the amount of data that is synchronized to the handheld.



6. The **View Details** button offers the opportunity to see an estimated data size for the information you have selected for Handheld Contact to sync between your ACT! database and your handheld device based on the criteria you have specified. **Click** the **View Details** button to review the data size.
    - The Sync Data Info window opens



7. *Click* **OK** to close and save your changes.
    - The *Advanced Auto-Sync Group* window closes.

Note: If a user is associated with a profile, that user's account settings can also be changed by making changes to the profile the user is associated with — though changes to a profile are reflected in all users associated with that profile. For more on making changes to a profile, see "4.2 Changing a Profile".

3.5 Finding a User

The more Handheld Contact users you have, the more difficult it becomes to find a particular user in the *User Accounts Table*. Handheld Contact's Find feature enables you to quickly find a user in the *User Accounts Table*. Find a user as follows.

1. Click **Find** in the main toolbar or select **Find User…** from the View menu.
    - The *Find User window* appears.
2. Enter the whole or part of the ACT! user name or Handheld Contact user name you want to find in the *Find field*.
3. Click **Search**.
    - The names of the users matching your search criteria appear in the *Find User table*.

4. Select the user name of the user you want to find in the *Find User table* and click **OK**.
    - The *Find User window* closes and Handheld Contact highlights the user you wanted to find in the *User Accounts Table*.

3.6 Removing a User

Remove an existing user from Handheld Contact as follows.

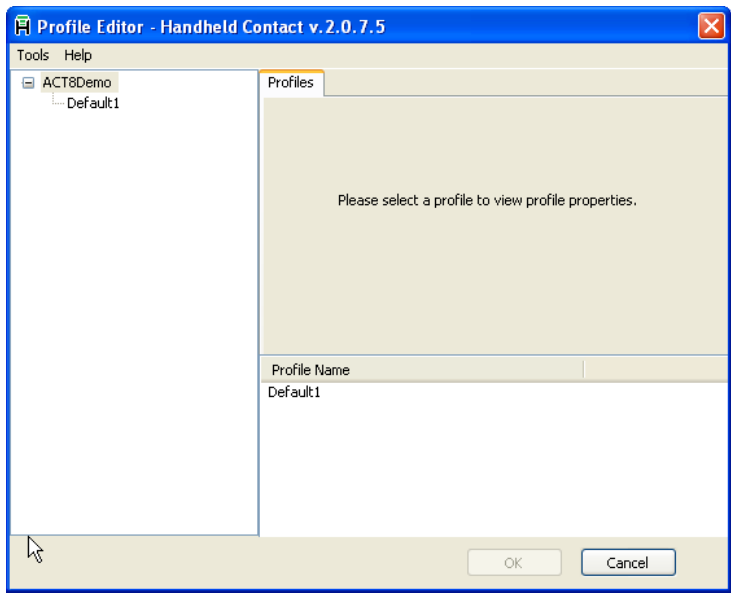
1. In the *User Accounts Table*, click the user name of the user you want to remove.
2. From the Tools menu, select **Manage** > **Users** > **Delete**.
    - A message appears asking you to confirm the deletion.
3. Click **Yes** to remove the user.
    - The user is deleted.

4.0 Profile Management

The Handheld Contact computer application allows you to create sync profiles for use as common settings for multiple Handheld Contact users. Sync profiles can be created based on existing Handheld Contact user accounts or from scratch and can be created for existing users or users you plan to add. Profiles are managed using the *Profile Editor*. Access the *Profile Editor* as follows.

1. From the Tools menu, select **Manage** > **Profiles**.
    - The *Profile Editor* appears with all existing profiles listed under the name of the database they are associated with in the *Profile Directory* (see Figure 4A).

Figure 4A - The Profile Editor



4.1 Creating a Profile

In order to assign common sync settings to multiple user accounts, you must first create a sync profile using the *Profile Editor*. Create a profile as follows.

1. In the *Profile Editor*'s *Profile Directory*, highlight the database with which you want the new profile to be associated.
2. From the Tools menu, select **Add Profile**.
    - A new profile appears under the selected database and its properties appear in the *Profile Properties pane*.
3. With the new profile highlighted, from the Tools menu, click **Rename Profile** and type a name for your profile (see Figure 4B).
4. Edit the sync settings associated with the profile by clicking one of the *Contacts*, *Activities*, *Note/Histories*, or *Mapping Fields tabs* in the *Profile Properties pane* and clicking **Change…** (see Figure 4C).
    - The *Change User Settings window* opens to the section corresponding to the tab selected from the *Profile Properties Pane*.
5. Change your Contacts, Activities, Note/Histories, or Field Mapping settings as desired.
6. Click **OK** to close the *Change User Settings window*.
7. Click **OK** to close the *Profile Editor*.

Note: For detailed information on changing user settings, see "3.3 Changing a User's Settings".

- The *Profile Editor* closes. If you are creating a profile from within the *Add User Wizard* or the *Add Multiple Users Wizard*, you are returned to the wizard you are using.

8. If you did not create your profile from within the *Add User Wizard* or the *Add Multiple Users Wizard*, click **Save** in the main toolbar to save your changes.

Figure 4B - Renaming a Profile

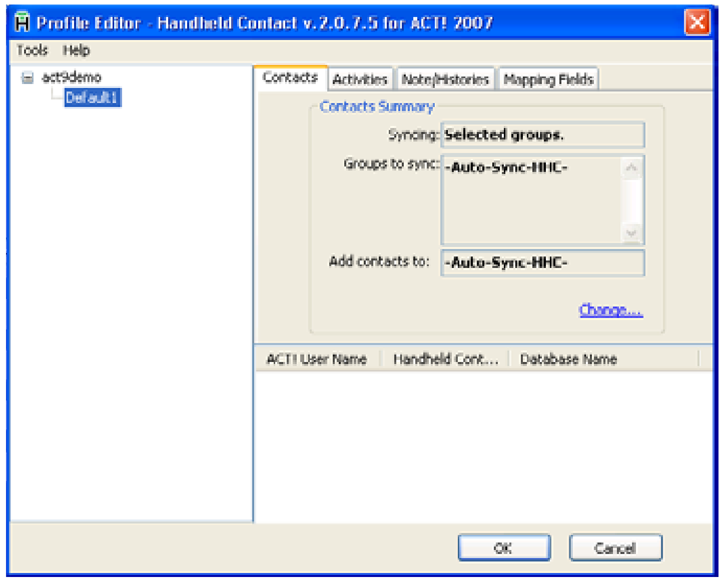
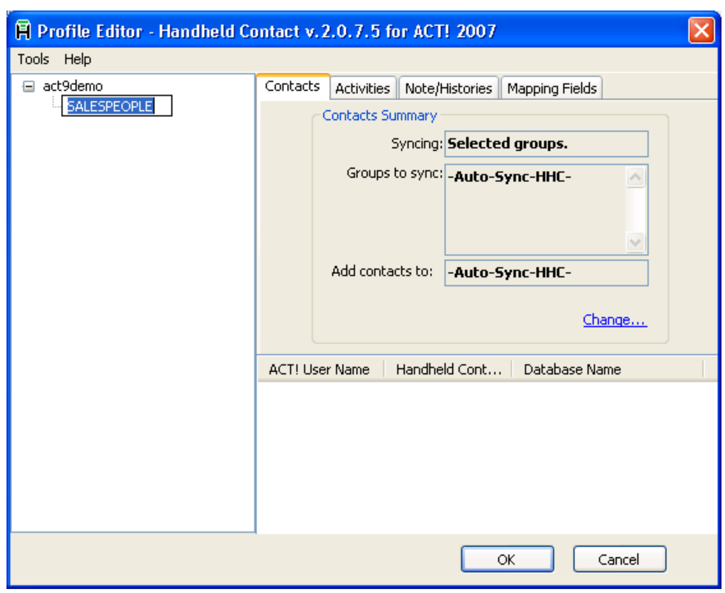


Figure 4C - Editing the sync settings associated with a profile



4.2 Changing a Profile

Note: When you enter the *Profile Editor* and select a profile from the *Profile Directory*, the names of all user accounts associated with that profile appear in the table below the *Profile Properties pane.*

It is also possible to change an existing profile. When you change an existing profile, you change all user accounts associated with that profile as well. Change a profile as follows.

1. From the Tools menu, select **Manage** > **Profiles**.
    - The *Profile Editor* appears
2. In the *Profile Editor*, click the name of the profile you want to change in the *Profile Directory*.
    - The profile's properties appear in the *Profile Properties pane*.
3. Edit the sync settings associated with the profile by clicking one of the *Contacts*, *Activities*, *Note/Histories*, or *Mapping Fields tabs* in the *Profile Properties pane* and then clicking **Change…**.
    - The *Change User Settings window* opens to the section corresponding to the tab you selected from the *Profile Properties Pane*.
4. Change your Contacts, Activities, Note/Histories or Field Mapping settings as desired.
5. Click **OK** to close the *Change User Settings window* and return to the *Profile Editor*.
6. Click **OK** to close the *Profile Editor*.

Note: For detailed information on changing user settings, see "3.3 Changing a User's Settings".

4.3 Adding Users to a Profile

Note: If a user is already associated with a profile, adding that user to a new profile removes them from the profile they were previously associated with.

Adding users to a profile automatically bestows that profile's sync settings on those users. Add users to a profile as follows.

1. In the *Profile Editor's Profile Directory*, click the name of the profile you want to add users to.
    - The profile's properties appear in the *Profile Properties pane* and the users accounts associated with that profile appear in the table below the *Profile Properties pane*.
2. From the Tools menu, select **Add Users to Profile**.
    - The *Add Users to Profile window* appears listing the names of the user accounts associated with the same database as those associated with the profile.
3. Click the ACT! user name of the user you want to add to the profile and then click **OK**.
    - The name of the user you selected appears in the table below the *Profile Properties Pane*.
4. Click **OK** to close the *Profile Editor*.

4.4 Moving Users to a Different Profile

Handheld Contact lets you move users between profiles. Move a user between profiles as follows.

1. In the *Profile Editor's Profile Directory*, click the name of the profile associated with the user you want to move.
2. In the table below the *Profile Properties pane*, click the name of the user you want to move.
3. From the Tools menu, select **Move User to Profile**.
    - The *Move User to Profile window* appears listing the profiles which are available to move the user to.
4. Select the profile you want to move the user to from the list in the *Move User to Profile window*.

5. Click **OK**.
    - The *Move User to Profile window* closes and the name of the user you selected no longer appears in the table below the *Profile Properties pane*.
6. In the *Profile Directory*, click the name of the profile to which you just moved the user.
    - The name of the user you moved is now present in the table below the *Profile Properties pane*.
7. Click **OK** to close the *Profile Editor*.

4.5 Removing a Profile

Note: Removing a profile does not change the sync settings for users associated with the removed profile. However, once a profile is removed, users are no longer associated with that profile and their settings can no longer be changed simultaneously.

If you find that you no longer need a specific profile, you can remove that profile. Remove a profile as follows.

1. In the *Profile Editor*'s *Profile Directory*, click the name of the profile you want to remove.
    - The profile's properties appear in the *Profile Properties pane* and the users accounts associated with that profile appear in the table below the *Profile Properties pane*.
2. From the Tools menu, select **Remove Profile**.
    - A message appears asking you to confirm that you want to remove the profile.
3. Click **OK** to remove the profile.
    - The profile is removed.
4. Click **OK** to exit the *Profile Editor*.

5.0 Sync Data Management

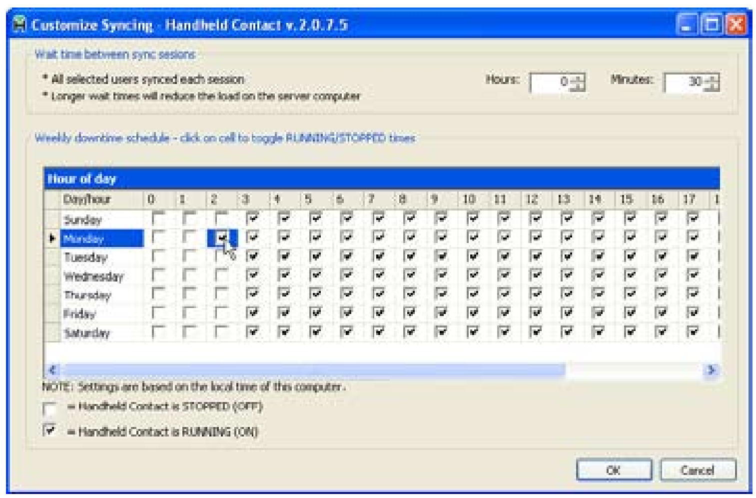
Once you have configured the settings for syncing between users' handheld devices and your ACT! database, you can manage exactly when and how often syncing occurs between the handheld devices and the database.

5.1 Customizing Sync Schedule

You can further customize your sync schedule by specifying how often you want Handheld Contact to sync between your ACT! database and users' handheld devices and what times of day you want syncing enabled and disabled. Further customize your sync schedule using the Customize Syncing window as follows.

1. From the Tools menu, select **Customize Sync Schedule…**.
    - The *Customize Syncing window* appears.
2. In the *Wait time between sync sessions pane*, specify the duration of time between syncs using the *Hours and Minutes boxes*.
3. In the *Weekly downtime schedule table*, select the check boxes for all hours that you want to enable syncing (see Figure 5A).

Figure 5A - The Customize Syncing window



4. Click *OK* to close the *Customize Syncing window*.

5.2 Resending All Data to User(s)

Occasionally, it may be necessary to refresh the ACT! data on a user's handheld device. By resending all data to a specific user, you erase all existing ACT! data on the user's handheld and repopulate it during a single sync. Resend all ACT! data to users' handheld devices as follows.

Note: Resending all data to a user can be very time-consuming depending on the amount of data designated to resend.

1. From the Maintenance menu, select **Resend All Data to Handheld…**.
    - The *Send All Data window* appears.
2. Select the check box for each user whose handheld you want data resent to.
3. Select **Send All**.
    - The *Send All Data window* closes and an alert message appears asking if you want to continue to resend all data for the selected users.
4. Click **Yes** to resend all data for the selected users.
    - All ACT! data is erased from and resent to each specified users' handheld device during each users' next scheduled sync.

5.3 Erasing All Data from a User's Handheld Device

You can configure Handheld Contact to erase all the ACT! data from a user's handheld device during the user's next scheduled sync. Erase all ACT! data from a user's handheld devices as follows.

1. From the Maintenance menu, select **Erase Data from Handheld…**.
    - The *Erase Data window* appears.
2. Select the check box next to each user whose handheld you want to erase all ACT! data from.
3. Select **Erase Data**.
    - The *Erase Data window* closes and an alert message appears asking you if you want to continue to erase all ACT! data for the selected users.
4. Click **Yes** to erase all ACT! data on the handheld devices of the selected users.
    - All ACT! data is erased on each specified users' handheld device during each user's next sync.

5.4 Manually Forcing Syncing

While syncing is scheduled to occur automatically at regular intervals in Handheld Contact, you can also manually force syncing between a user's handheld device and an ACT! database if you don't want to wait for a scheduled sync. Syncing can be manually forced for a single user or multiple users simultaneously.

5.4.1 Manually Force Syncing for a Single User

Manually force syncing for a single user as follows.

1. In the *User Accounts Table*, select the user for whom you want to manually force syncing.
2. Click **Sync Now** in the expanded *HHC User Account Info pane* in the *Info Sidebar*.
    - Data is synced immediately between the selected user's handheld device and the ACT! database specified for that user.

5.4.2 Manually Force Syncing for Multiple Users

Manually force syncing for multiple users as follows.

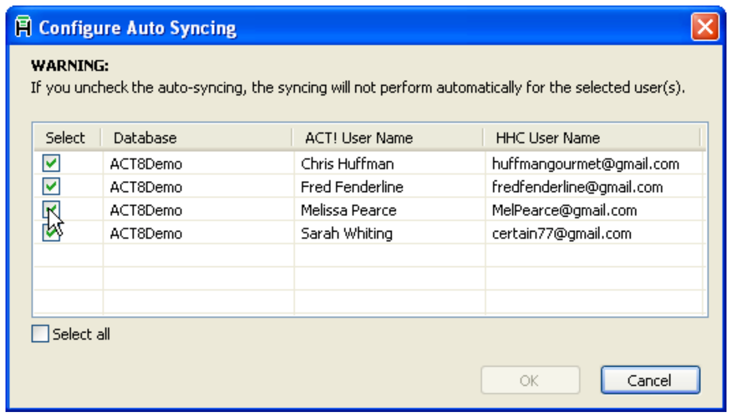
1. From the Maintenance menu, select **Synchronize Users…**.
    - The **Sync Now** window appears.
2. Select the check box next to each user for whom you want to manually force syncing.
3. Select **Sync Now**.
    - The *Sync Now window* closes and a sync occurs between the specified users' handheld devices and the ACT! databases designated for those users.

5.5 Disabling Auto Syncing

Auto syncing is enabled by default when you add a user. However, you can disable auto syncing for users as follows.

1. From the Maintenance menu, select **Configure Auto Syncing…**.
   - The *Configure Auto Syncing window* appears.
2. Clear the check box next to the user's ACT! user name in the table in the *Configure Auto Syncing window* to disable auto syncing for a user (see Figure 5B).

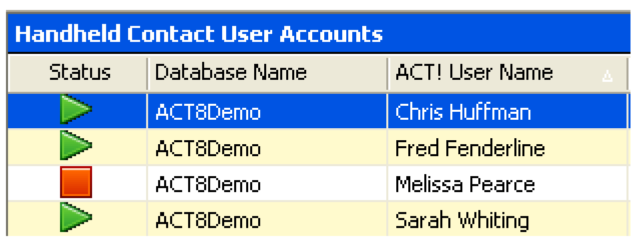
Figure 5B - Disabling auto-syncing in the Configure Auto Syncing window



Note: To re-enable auto syncing for a user, select the check box next to the user's ACT! user name in the *Configure Auto Syncing window*.

3. Click **OK** to close the *Configure Auto Syncing window*.

Figure 5C - User Accounts Table Status Column



Note: If auto syncing is enabled for a user, a green arrow appears for that user in the *Status column* of the *User Accounts Table*. If auto syncing is disabled for a user, a red square appears for that user in the *Status column* of the *User Accounts Table* (see Figure 5C).

6.0 Email Alerts Management

In the Handheld Contact computer application, the *Synchronization Pane* below the *User Accounts Table* displays sync error and sync status messages. If the *Synchronization Pane* is set to display, a check mark is displayed beside it in the View menu. You can hide the *Synchronization Pane* by selecting **Synchronization Pane** from the View menu.

In many cases, the Handheld Contact computer application is not accessible to all Handheld Contact users; it may be that it is installed on a central server or on the computer of an administrator. As such, users who do not have access to the Handheld Contact computer application can be set up to receive regular emails which update them on syncing errors, syncing status, and product updates — information they might not otherwise see.

All email alerts are managed from the *Email Alerts window*. Access the *Email Alerts window* as follows.

1. From the Tools menu, select **Email Alerts…**.
    - The *Email Alerts window* opens.

6.1 Email Settings

Before Handheld Contact is able to notify users of anything via email alerts, you must first designate an email account to send the alerts. Designate an email account to send alerts as follows.

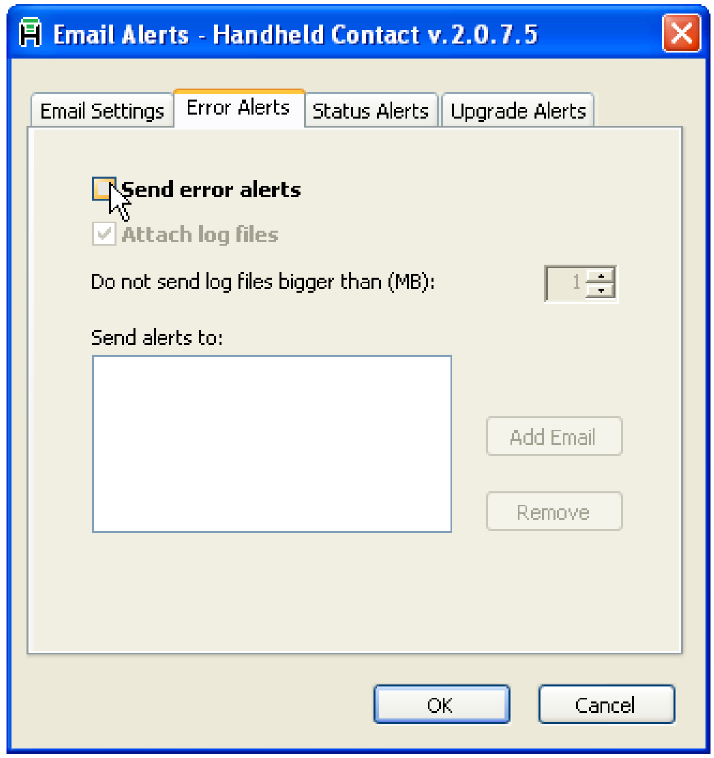
1. In the *Email Alerts window*, click the *Email Settings tab*.
2. Enter the server information, email address, and password for the email account you want to use to send email alerts in the *SMTP server*, *User name*, and *Password fields* respectively.
3. Enter the name you want email alerts to display as sender in the *From name field*.
4. Enter the email address you want email alerts to display as sender in the *From e-mail field*.
5. The *SMTP port field* is set by default to 25 which should work in most cases. Change the field as necessary.
6. Set your desired authentication parameter from the *Authentication drop-down list*.
7. Click **Test Email**.
    - If settings are correct, the *Test Email field* displays a message reading "SMTP server test is successful". A test email message is sent to the email address set up in the *User name field* as well.
8. Click **OK** to close the *Email Alerts window*.

6.2 Error Alerts

Error alerts are emails which notify users of syncing problems when they occur. Once a user is set up to receive error alerts, the user will be notified by email if Handheld Contact has a problem syncing between an ACT! database and that user's handheld device. Set error alert recipients as follows.

1. In the *Email Alerts window*, click the *Error Alerts tab*.
    - The *Error Alerts tab* opens (see Figure 6A).

Figure 6A - The Error Alerts tab of the Email Alerts window



2. Click the *Send error alerts check box*.
3. Make sure the *Attach log files check box* is selected if you want log files to be included in error alert emails.
4. In the *Do not send log files bigger than (MB) box*, specify a maximum size for log file attachments. Log files greater than the specified size will not be included in error alert emails. For detailed information on log files, see "7.0.2 Storing Log Files".
5. Click **Add Email** to specify the intended alert recipient's email address.
   - The *Add Email window* opens allowing you to enter an error alert recipient's email address.
6. Enter an error alert recipient's email address in the *Email field* and click **OK**.
   - The *Add email window* closes and returns you to the *Email Alerts window* where the email you entered appears in the *Send alerts to list*.
7. To add additional error alert recipients, repeat 5-6.
8. Click **OK** to close the Email Alerts window.

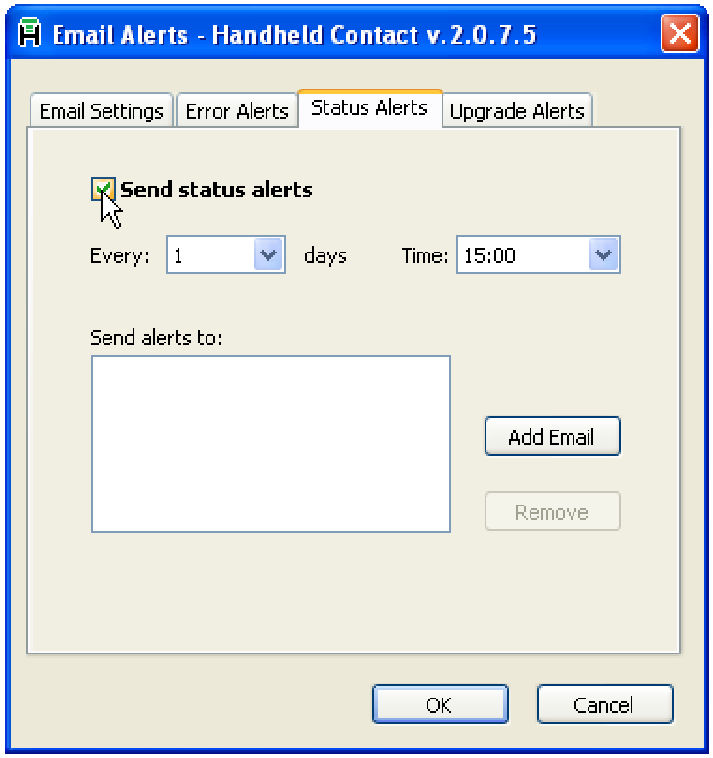
Note: To stop sending error alerts to a recipient, highlight the recipient's email address in the *Send alerts to list* and click **Remove**.

6.3 Status Alerts

Status alerts are emails which provide users with information about syncing such as how many users have synced, how many contacts, activities, and note/histories have been sent and received, how many databases have synced, and how many users have not synced over a certain period of time. Set status alert recipients as follows.

1. In the *Email Alerts window*, click the *Status Alerts tab*.
   - The *Status Alerts tab* opens (see Figure 6B).

Figure 6B - The Status Alerts tab of the Email Alerts window



2. Click the *Send status alerts check box*.
3. Specify how often you want Handheld Contact to send status alerts using the *Every drop-down menu*.
4. Specify the time at which you want Handheld Contact to send status alerts using the *Time drop-down menu*.
5. Click **Add Email** to specify the intended alert recipient's email address.
    - The *Add Email window* opens allowing you to enter a status alert recipient's email address.

Note: To stop sending status alerts to a recipient, highlight the recipient's email address in the *Send alerts to list* and click **Remove**.

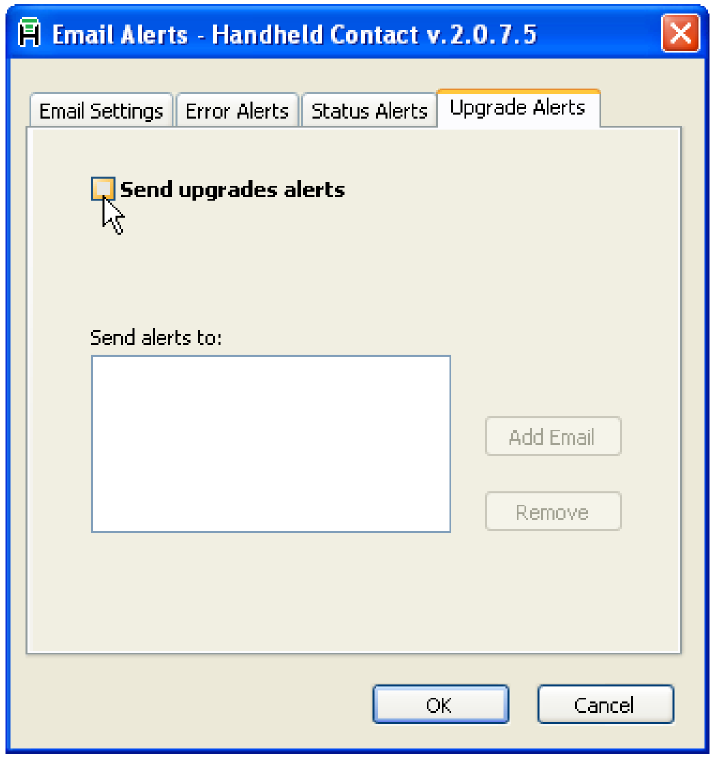
6. Enter a status alert recipient's email address in the *Email field* and click **OK**.
    - The *Add email window* closes and returns you to the *Email Alerts window* where the email you entered appears in the *Send alerts to list*.
7. To add additional status alert recipients, repeat 5-6.
8. Click **OK** to close the *Email Alerts window*.

6.4 Upgrade Alerts

Upgrade alerts are emails which notify users of upgrades to Handheld Contact and the Handheld Contact computer application when they are available. Set upgrade alert recipients as follows.

1. In the *Email Alerts window*, click the *Upgrade Alerts tab*.
    - The *Upgrade Alerts tab* opens (see Figure 6C).

Figure 6C - The Upgrade Alerts tab of the Email Alerts window



2. Click the *Send upgrade alerts check box*.
3. Click **Add Email** to specify the intended alert recipient's email address.
    - The *Add Email window* opens allowing you to enter an upgrade alert recipient's email address.
4. Enter an upgrade alert recipient's email address in the *Email field* and click **OK**.
    - The *Add email window* closes and returns you to the *Email Alerts window* where the email you entered appears in the *Send alerts to list*.
5. To add additional error alert recipients, repeat 3-4.
6. Click **OK** to close the *Email Alerts window*.

Note: To stop sending upgrade alerts to a recipient, highlight the recipient's email address in the *Send alerts to list* and click **Remove**.

Note: You can also check for updates manually by clicking **Check for Updates** in the Help menu.

7.0 Options

From the *Options window* in the Handheld Contact computer application, you can adjust various features of the application itself including settings for storing log files, your HHC administrator password, and settings for the display of upgrade notifications. Access the *Options window* as follows.

1. From the Tools menu, select **Options…**.
    - The *Options window* appears.

7.0.1 Modifying Sync Server URL

The default sync server URL is http://sync.wires-end.net/HHC2005/. If you need to change the sync server URL, please contact support@handheldcontact.com.

7.0.2 Storing Log Files

You can enable the Handheld Contact computer application to store a record of its status and errors. Enable storage of log files as follows.

1. In the *Options window*'s *Log files pane*, select the *Enable extensive logging check box*.
2. Specify the maximum size allotted for log files by adjusting the number in the *Maximum size box*.
3. Click the **…** button next to the *Location field*.
    - The *Browse window* appears and allows you to navigate to the folder in which you want to save log files.
4. Find the folder in which you want to save log files, select it, and click **OK**.
    - The path of the folder you just selected appears in the *Location field*.
5. Click **OK** to close the *Options window*.

7.0.3 Adding an HHC Administrator Password

The HHC Administrator password is the password you are prompted to enter when you first open the Handheld Contact computer application. Add the HHC Administrator password as follows.

1. In the *Options window*'s *Administrative password pane*, check the Use administrator password checkbox then click the button labeled **Add…**.
    - The *Add Administrator Password window* appears.
2. Enter the new administrator password in the *New password field* and the *Confirm new password field*.
3. Click **OK**.
    - The *Add Administrator Password window* closes.
5. Click **OK** to close the *Options window*.

7.0.4 Changing the HHC Administrator Password

The HHC Administrator password is the password you are prompted to enter when you first open the Handheld Contact computer application if a password has been defined. Change the HHC Administrator password as follows.

1. In the *Options window*'s *Administrative password pane*, select **Change…**.
    - The *Change Administrator Password window* appears.

2. Enter the current administrator password in the *Old password field*.
3. Enter the new administrator password in the *New password field* and the *Confirm new password field*.
4. Click **OK**.
    - The *Change Administrator Password window* closes.
5. Click **OK** to close the *Options window*.

7.0.5 Upgrade Notifications

You can set the Handheld Contact computer application to present you with notification messages when new upgrades for the program become available. Notifications come in the form of messages which pop up from the *status bar* when you start the Handheld Contact computer application. Set the Handheld Contact computer application to display upgrade notifications as follows.

1. In the *Options window*'s *Upgrade notification pane*, select the *Notify me when upgrades to Handheld Contact become available check box*.
2. Click **OK** to close the *Options window*.

8.0 Estimating the Size of a User's Sync Data

Because the storage capacity of handheld devices is much smaller than that of desktop computers, it is convenient to be able to preview the amount of data which will end up on a user's handheld device after a sync. Sync Data Info is an estimate of the size of the data that has been selected to sync between an ACT! database and a user's handheld device based on that user's sync settings.

Access Sync Data Info as follows.

1. In the *User Accounts Table*, click the user name of the user whose Sync Data Info you want to check.
2. In the main toolbar, click **Sync Data Info**.
    - Once the program is done reviewing data, the *Sync Data Info window* appears.
3. Click **Close** to close the *Sync Data Info window*.

9.0 Accessing your Account Online

Handheld Contact enables you to access your Handheld Contact account online at www.handheldcontact.com.

Accessing your account online allows you to view statistics on your Handheld Contact usage, change your password, edit your account info, and send an over the air installation link to your handheld device to guide you through the installation of Handheld Contact. Access your account online as follows.

1. Using a web browser, go to www.handheldcontact.com and click the **My Account** link in the top right corner of the web page.
    - You are directed to the *My Handheld Contact Account Login page*.
2. Enter your Handheld Contact user name and password in the *User name* and *Password fields* respectively and then click **Login**.
    - You are directed to your *Handheld Contact Account Status Summary*.

9.1 Checking User Statistics

When you access your Handheld Contact account online, the first web page you are directed to is your *Handheld Contact Account Status Summary* which displays your Handheld Contact user statistics. Your *Handheld Contact Account Status Summary* displays up-to-date syncing statistics for your Handheld Contact user account including

- the last time your handheld synced
- the last time your computer synced
- statistics on data ready to be synced to your handheld
- statistics on data ready to be synced to your ACT! database
- the expiration date of your account

On top of logging in through www.handheldcontact.com, you can also access your *Handheld Contact Account Status Summary* through the Handheld Contact computer application.

Access your *Handheld Contact Account Status Summary* using the Handheld Contact computer application as follows.

1. From the Tools menu, select **User Statistics**.
    - You are automatically redirected to your online *Handheld Contact Account Status Summary* which features your most up-to-date Handheld Contact user statistics.

Note: Your Handheld Contact password is distinct from the HHC Administrator password. For information on changing the HHC Administrator Password, see "7.0.3 Changing the HHC Administrator Password".

Note: To avoid experiencing disruptions to your Handheld Contact service as a result of changing your password, ensure that you also change the password saved in Handheld Contact on your handheld device to your new password.

9.2 Changing your Handheld Contact Password

Once you have accessed your Handheld Contact account online, you are able to change your Handheld Contact password. Change your Handheld Contact password as follows.

1. In the Handheld Contact computer application, click the **Change Password** link at the top of your *Handheld Contact Account Status Summary*.
    - You are redirected to the *Change Password web page*.
2. Enter your new password in both the *New password field* and the *Verify password field*.
3. Click **Save** to complete your password change.
4. In Handheld Contact on your handheld device, click the trackwheel to access the main menu.
5. Select **Options**.
    - The *Options screen* appears.

6. Highlight the *Password field*, click the trackwheel, and select **Change Option** from the menu.
    - Your old password appears.
7. Enter your new password in place of the old password.
8. Click the trackwheel and select **Save** to return to the *Options screen*.
9. Click the trackwheel and select **Save** to exit the *Options screen* and save your new password.
    - Your password change is complete.

9.3 Updating your Account Information

Once you have accessed your Handheld Contact Account online, you are able to update your Handheld Contact account to ensure that your most current information including job title, company, address, phone number and more is associated with your Handheld Contact account. Update your Handheld Contact account information as follows.

1. Click the **Edit Account Info** link at the top of your *Handheld Contact Account Status Summary*.
    - You are redirected to the *Edit Account Information web page*.
2. Update your account information as desired in the fields provided. An asterisk next to a field designates that field as required.
3. Click **Save**.

9.4 Sending an OTA Installation Link to your Handheld Device's Inbox

An over the air (OTA) installation link, once sent to your handheld device inbox, allows you to follow step-by-step instructions for the installation of Handheld Contact on your handheld device. Once you have accessed your Handheld Contact Account online, you are able to send an OTA installation link directly to the email inbox on your handheld device.

Send an OTA installation link to your handheld device's inbox as follows.

1. Click the **Send OTA Link to BlackBerry** link at the top of your *Handheld Contact Account Status Summary*.
    - You are redirected to the *Send OTA Link web page*.
2. Click **Send** to send an OTA installation link to your handheld device.
    - An OTA installation link is emailed to the inbox on your handheld device.

10.0 Configuration Files

Configuration files function in Handheld Contact as restore points, allowing you save a configuration of Handheld Contact settings and later revert back to that configuration. As you make more and more changes to your settings in the Handheld Contact computer application, it is a good idea to save configuration files occasionally in case you want to undo some of the changes you make by restoring the application to a previous point.

10.1 Saving Configuration Files

Saving a configuration file creates a point to which you may later restore your Handheld Contact settings. Save a configuration file as follows.

1. From the File menu, click **Save As…**.
    - A window appears allowing you to specify a folder and name for the file you are about to save.
2. From the *Save in drop-down list*, browse to the folder in which you want to save your Handheld Contact configuration file.
3. Enter a name for your file in the *File name field*.
4. Click **Save**.
    - The window closes, saving your configuration file.

10.2 Loading Configuration Files

Revert to a previously saved configuration of Handheld Contact as follows.

Note: Reverting to a previously saved configuration of Handheld Contact only restores the settings which determine HOW data is synced between your handheld device and your ACT! database. It will not restore previously cleared data to your handheld device, though it may alter settings for your next designated sync.

1. From the File menu, click **Load Settings…**.
    - A window appears allowing you to navigate to a previously saved configuration of Handheld Contact.
2. In the *Look in drop-down list*, navigate to the folder containing the configuration file you would like to load.
3. Select the configuration file you would like to load and then click **Open**.
    - The window closes, restoring the settings for your Handheld Contact computer application to the previously saved configuration.

11.0 Support

Most Handheld Contact support topics are covered in our extensive Knowledge Base which is available on-line at www.handheldcontact.com/kb/ or by clicking Knowledge Base in the Help menu of the Handheld Contact computer application.

Index

A

account information, updating your 36
activities, syncing 10
activities, syncing specific 11
Add Multiple Users Wizard 15
Add User Wizard 8

C

configuration files, loading 37
configuration files, saving 37
contact group 9
contacts, sync all 9
contacts, syncing 9
contacts, syncing groups of 9

D

database, associating users with a 8
database, changing settings for a 5
database, removing a 7
database sync schedule 5
downloading Handheld Contact 2

E

email alerts 28
email alerts, settings for 28
erasing data from a user's handheld device 26
error alerts 28
error alerts, setting recipients for 28

F

field mapping 12
field mapping, changing settings for 12
field mapping, naming fields for 13
field mapping fields with drop-down lists 13
field mapping settings 12

H

handheldcontact.com 2, 38
Handheld Contact account, accessing your online 35
Handheld Contact main screen 3
histories, syncing. *See* note/histories, syncing

I

info panes, expanding 18
installation of the BlackBerry application 36
installation of the computer application 2

K

Knowledge Base 38

L

log files, storing 32

N

note/histories, syncing 11
note/histories, syncing specific 11
notes, syncing. *See* note/histories, syncing

O

OTA installation link, sending an 36

P

password, changing the HHC Administrator 32
password, changing your 35
Profile Directory 21
Profile Editor 21
profiles, adding users to 23
profiles, assigning multiple users to 16
profiles, changing sync settings in 23
profiles, creating 21
profiles, moving users between 23
profiles, removing 24
profiles, renaming 21

R

resending data to users 25

S

statistics, checking user 35
status alerts 29
status alerts, setting recipients for 29
support 38
Sync Data Info 34
Synchronization Pane 28
Synchronization Pane, displaying the 28
syncing, auto 27
syncing, disabling auto 27
syncing, manually forcing 26
syncing, re-enabling auto 27
Sync Now 26
sync schedule, customizing 25
sync server 32
sync settings 5

U

updates, checking for 31
upgrade alerts 30
upgrade alerts, setting recipients for 30
upgrade notifications 33
User Accounts Table 3, 4, 19, 27
User Accounts Table, customizing layout of 3
users, adding individual 8
users, adding multiple 15
users, associating profiles with 23
users, changing settings for 18
users, finding 19
users, removing 20