

The logo for HandheldContact features a green wireless signal icon above the letter 'H' in the word 'Handheld'. The word 'Handheld' is in a bold, black, sans-serif font, while 'Contact' is in a lighter gray, sans-serif font.

# HandheldContact

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Handheld Contact for BlackBerry User Guide

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## Introduction

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

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

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

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

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

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

## Adding an ACT! contact on your BlackBerry

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

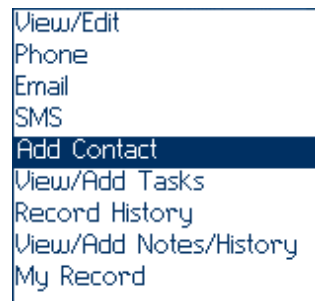
1. Click the **Handheld Contact** icon (see Figure 1) on your BlackBerry home screen.

Figure 1 - The Handheld Contact icon



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

Figure 2 - The HHC menu



3. Select **Add Contact** from the HHC menu.
  - The **Add Contact** popup appears.

4. Enter data for the contact by highlighting fields and typing with keypad on your BlackBerry (see Figure 3).

Figure 3 - Entering contact data

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

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5. Once you have entered all desired information for the contact you are adding, select **Save** from the menu.
  - The contact you entered appears in your contact list.

## Editing a contact's information

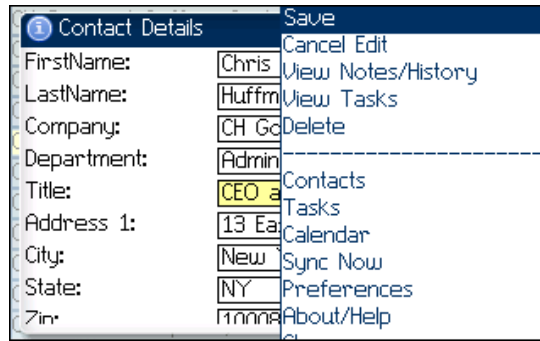
On top of enabling you to add ACT! contacts to your ACT! database using your BlackBerry device, Handheld Contact also enables you to edit information for existing contacts. Edit a contact's information as follows.

1. Highlight the contact you want to edit, from the menu select **View/Edit**. (see Figure 4)

Figure 4 - Accessing the Views/Edit Contact screen

- The *View/Edit Contact* screen appears.
2. Highlight the field you want to edit by scrolling with the trackball.
  3. If your edit is in the middle of a field, scroll left or right using the trackball to position the cursor.
  4. Using the BlackBerry keypad, type in your edit.
  5. Repeat 2-4 for each field you want to edit.
  6. From the menu, select **Save** to save your edits (see Figure 5) and return to your contact list.

Figure 5 - Saving your edits

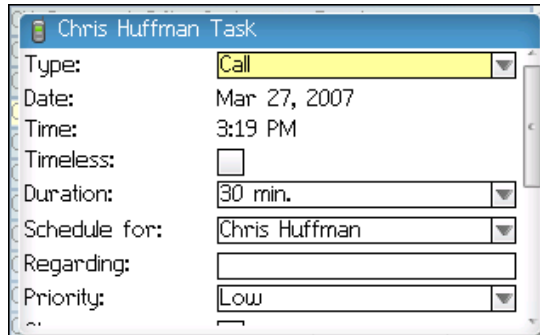


## Scheduling ACT! activities on your BlackBerry

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

1. Access the HHC menu.
2. From the menu select the appropriate item depending on which component of HHC is currently in use. In Task view select **Add Task**, in Contacts view select **View/Add Tasks**, and from Calendar view select **Add Todo**, **Add Meeting**, or **Add Call**.
  - The *Activity details screen* appears (see Figure 6).

Figure 6 - The Edit Activity screen



3. If necessary, change the *activity type* by highlighting the activity type drop down box (see Figure 6) by clicking the trackball. Scroll through the expanded drop down by using the trackball. Click the trackball again to collapse the drop down.
4. Adjust the month by highlighting the month field and scrolling left or right using the trackball. Adjust the day, year, and time of your activity as needed by highlighting each field and typing the numeric value desired. Alternatively, each field can be incremented by each press of the **Spacebar** key.
5. Edit the regarding and details fields by highlighting the field and typing directly into the field.
6. Once all edits are complete, from the menu select **Save**.
  - The activity you scheduled appears in your tasklist and your calendar.

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Note: Drop downs, check boxes, date, and time fields can all be edited by scrolling left and right with the trackball.

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

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

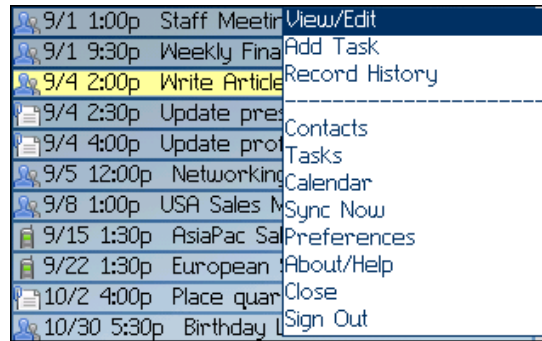
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## Editing an Activity

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

1. In the Tasks view highlight the task you want to edit.
2. From the menu select **View/Edit** from the HHC menu (see Figure 7).

Figure 7 - Accessing the Edit Activity screen



- The *View/Edit Activity* screen appears.
3. If necessary, change the *activity type* by highlighting the activity type drop down box by clicking the trackball. Scroll through the expanded drop down by using the trackball. Click the trackball again to collapse the drop down.
  4. Adjust the month by highlighting the month field and scrolling left or right using the trackball. Adjust the day, year, and time of your activity as needed by highlighting each field and typing the numeric value desired. Alternatively, each field can be incremented by each press of the **Spacebar** key.
  5. Edit the regarding and details fields by highlighting the field and typing directly into the field.
  6. Once all edits are complete, from the menu select **Save**.
    - The changes to your activity are saved and will appear in the ACT! database next time you sync.

## Adding a Note

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

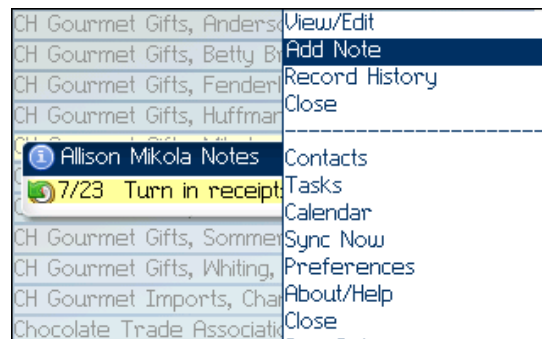
1. In the Contacts view highlight the contact for whom you want to add a note, then from the menu select **View/Add Notes/History**

Figure 8 - Viewing a contact's Notes and History items



- The contact's Notes and History items are displayed
2. From the menu, select **Add Note** (see Figure 9).

Figure 9 - Accessing the Add Note screen



- The *Add Note* screen appears for the selected contact.
3. If necessary, change the *note type* by highlighting the note type drop down box by clicking the trackball. Scroll through the expanded drop down by using the trackball. Click the trackball again to collapse the drop down.
  4. Adjust the month by highlighting the month field and scrolling left or right using the trackball. Adjust the day, year, and time of your activity as needed by highlighting each field and typing the numeric value desired. Alternatively, each field can be incremented by each press of the **Spacebar** key.
  5. Edit the regarding and details fields by highlighting the field and typing directly into the field.
  6. Click the trackwheel and select **Save**.
    - A message displays at the bottom of your screen indicating that a note was added.

## Syncing Manually

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

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

Figure 10 - Sync Now



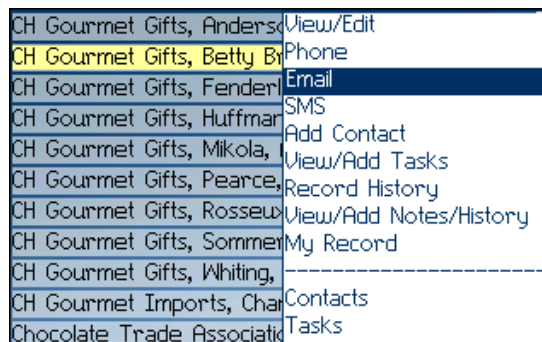
- Handheld Contact automatically executes a sync.

## Emailing a Contact

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

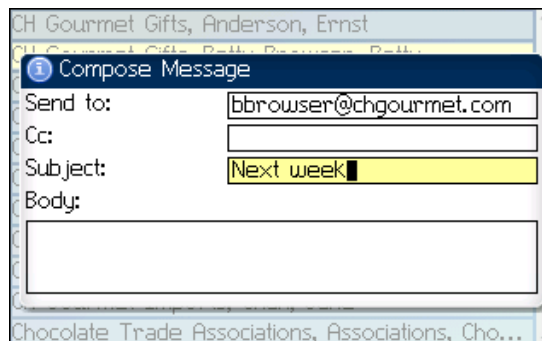
1. While using the **Contacts** view highlight the contact you want to email, then from the menu, select **Email** (see Figure 11).

Figure 11 - Accessing the Compose Message screen



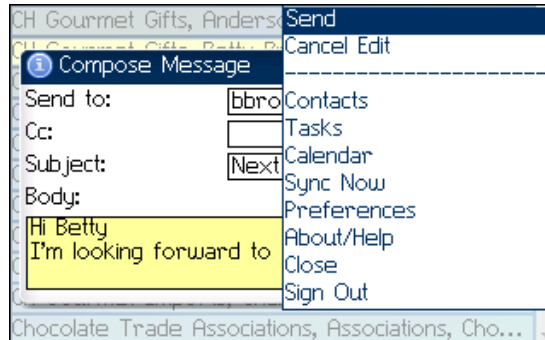
- The *Compose Message* screen appears.
4. Highlight the Subject line type a subject for your email (see Figure 12).

Figure 12 - Writing an email



5. Highlight the Body text area and write your email message using the BlackBerry keypad.
6. From the menu, select **Send** (see Figure 13).

Figure 13 - Sending an email



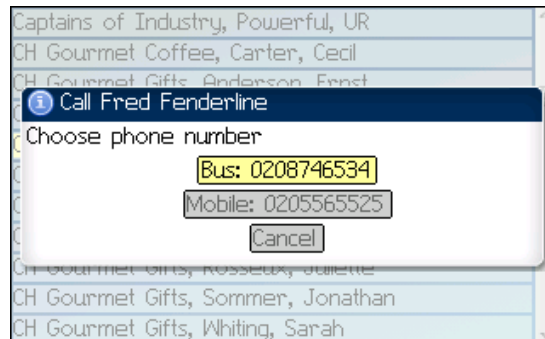
- Your email is sent.

## Dialing a Contact

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

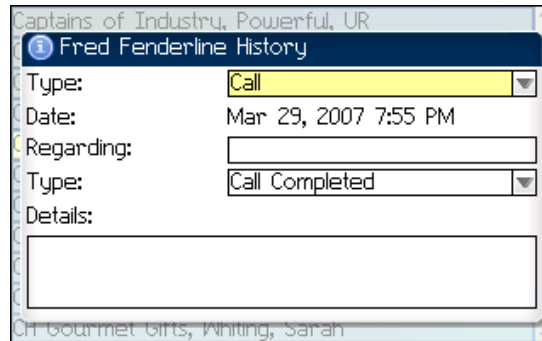
1. While using the **Contacts** view, highlight the contact you want to call, then from the menu select **Phone**.
2. If there is only one phone number associated with the chosen contact, that phone number will be dialed right away.
3. If there are multiple phone numbers associated with the chosen contact, all numbers are displayed (see Figure 14). Highlight the phone number you wish to dial for the selected contact and click the trackball.

Figure 14 - Calling a contact



- Handheld Contact dials your call.

- After your call is completed the Record History window appears should you wish to take notes regarding the call just placed.



- If necessary, change the *note type* by highlighting the note type drop down box (see Figure 6) and pressing the **Spacebar** key. Scroll through the expanded drop down by using the trackwheel. Press the **Spacebar** key again to collapse the drop down.
- Adjust the day, year, and time of your activity as desired by highlighting each field and typing the numeric value desired. Adjust the month by holding the **ALT** key, scrolling with the trackwheel, and releasing the **ALT** key when the desired month is selected. Alternatively, each field can be incremented by each press of the **Spacebar** key.
- Edit the regarding and details fields by highlighting the field and typing directly into the field.
- Click the trackwheel and select **Save**.