

The logo for HandheldContact features a green icon of three curved lines above the letter 'H'.

HandheldContact

Handheld Contact for iPhone User Guide

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Using Handheld Contact Professional Edition

Adding a contact

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Press the + button in the upper right.
4. Add the contact's information.
5. Press the *Save* button in the upper right.

Editing a contact

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Locate and open the contact you need to edit.
4. Press the *Edit* button in the upper right.
5. Edit the contact's information as needed.
6. Press the *Done* button in the upper right to save changes.

Calling a contact

You can call a contact directly from Handheld Contact when they have at least one phone number in their record.

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Locate and open the contact you want to call.
4. Find the phone field containing the number you want to dial.
5. Press the phone field to initiate the call.

E-mailing a contact

You can e-mail a contact directly from Handheld Contact when they have at least one e-mail address in their record.

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Locate and open the contact you want to e-mail.
4. Find the e-mail field containing the address you want to send to.
5. Press the e-mail field to initiate e-mail.

Text messaging a contact

You can text message a contact directly from Handheld Contact when they have at least one mobile phone number in their record.

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Locate and open the contact you want to text message.
4. Scroll to the bottom of the contact's record.
5. Press *Text Message* to initiate the text message.

Please note that some iPhones do not support this feature.

Creating an activity for yourself

From the Contacts view:

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Press the *My Record* button in the upper left.
4. Open your record.
5. Scroll to the end of the screen.
6. Press the *Activities* button.
7. Press the + button in the upper right.
8. Add the activity information.
9. Press the *Save* button in the upper right.

From the Tasks view:

1. Open *Handheld Contact*.
2. Press *Tasks* tab in the footer menu.
3. Press the + button in the upper right.
4. Add the activity information.
5. Press the *Save* button in the upper right.

Creating an activity for another ACT! user

Creating activities for other ACT! users allows you

From the Contacts view:

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Locate and open the contact you would like to schedule an activity for.
4. Scroll to the end of the screen.
5. Press the *Activities* button.
6. Press the + button in the upper right.
7. Add the activity information.
8. Press the *Save* button in the upper right.

From the Tasks view:

1. Open *Handheld Contact*.
2. Press *Tasks* tab in the footer menu.
3. Press the + button in the upper right.

4. Add the activity information.
5. Press the *Scheduled for* field.
6. Press the name person you would like to schedule the activity for.
7. Press the *Back* button in the upper left.
8. Press the *Save* button in the upper right.

Editing an activity

From the Contacts view:

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Locate and open the contact you would like to schedule an activity for.
4. Scroll to the end of the screen.
5. Press the *Activities* button.
6. Locate and open the activity you would like to edit.
7. Press the *edit* button in the upper right.
8. Update the activity record.
9. Press the *Save* button in the upper right.

From the Tasks view:

1. Open *Handheld Contact*.
2. Press *Tasks* tab in the footer menu.
3. Locate and open the activity you would like to edit.
4. Press the *Edit* button in the upper right.
5. Update the activity information.
6. Press the *Save* button in the upper right.

Associating contacts with activities

Like in ACT!, Handheld Contact for ACT! Professional allows you to associate activities with contacts. This is vital for users who would like to maximize efficiency and be able to track their performance.

To manage one or many contacts associated with an activity:

1. On an activity's screen press the *With* field button.
2. Mark a contact by pressing their name to associate them with the activity.
Unassociate a contact with the activity by unmarking a marked contact.
3. Press the save button in the upper right.

More information on working with activities see:

- “Creating an activity for yourself” on page 2
- “Creating an activity for another ACT! user” on page 2
- “Editing an activity” on page 3

Adding a note

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Locate and open the contact you would like to record a note for.
4. Scroll to the end of the screen.
5. Press the *Notes* button.
6. Press the + button in the upper right.
7. Add your note for the contact.

8. Press the *Save* button in the upper right.

Editing a note

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Locate and open the contact you would like to record a note for.
4. Scroll to the end of the screen.
5. Press the *Notes* button.
6. Locate and open the note you would like to edit.
7. Press *Edit* in the upper right.
8. Modify the contact's note.
9. Press the *Save* button in the upper right.

Manually adding a new history record

1. Open *Handheld Contact*.
2. Press *Contacts* tab in the footer menu.
3. Locate and open the contact you would like to record a note for.
4. Scroll to the end of the screen.
5. Press the *History* button.
6. Press the + button in the upper right.
7. Press *Edit* in the upper right.
8. Press *Type* field to set the type of History record.
9. Add details.
10. Press the *Save* button in the upper right.

Automatically adding new history records

You can call, e-mail, or text message a person directly from their contact record in the Handheld Contact for ACT! Professional Edition application on your iPhone.

Those interactions are automatically saved in your History records and linked to the contact it involved.

The next time you launch the Handheld Contact application you will be presented with the History record associated with the last interaction which was automatically saved. To update the record or add additional details, simply press the *Edit* button in the upper right.

Syncing manually

To immediately force a synchronization:

1. Open *Handheld Contact*.
2. Press *Sync Status* tab in the footer menu.
3. Press *Sync now* in the upper right.

Please note that the Handheld Contact for ACT! Professional application will only sync while it is open.

Updating your Handheld Contact for ACT! account username and password

1. Open *Handheld Contact*.

2. Press *Menu* tab in the footer menu.
3. Press *Preferences*.
4. Press *HHC Account*.

Controlling how contacts are sorted

1. Open *Handheld Contact*.
2. Press *Menu* tab in the footer menu.
3. Press *Preferences*.
4. Press *Contacts*.
5. Press the *Sort By* button.

Exporting contacts to the native iPhone Contacts application

You can export all contacts in Handheld Contact to the iPhone's native Contacts application. Depending on the number of contacts you have this can be a time consuming process. When this function is executed, previously exported contacts in the native iPhone Contacts application are removed and a fresh export is done. Contacts in the

1. Open *Handheld Contact*.
2. Press *Menu* tab in the footer menu.
3. Press *Preferences*.
4. Press *Contacts*.
5. Press the *Export Address Book* button.

Controlling how tasks are sorted and displayed

1. Open *Handheld Contact*.
2. Press *Menu* tab in the footer menu.
3. Press *Preferences*.
4. Press *Tasks*.

Managing automatic synchronization

1. Open *Handheld Contact*.
2. Press *Menu* tab in the footer menu.
3. Press *Preferences*.
4. Press *Server*.
5. Toggle the *Auto-Sync* switch.

Controlling how contacts are sorted

1. Open *Handheld Contact*.
2. Press *Menu* tab in the footer menu.
3. Press *Preferences*.
4. Press *Contacts*.
5. Press the *Sort By* button.

