

ACT! by Sage 2009
Quick Start
for Handheld Links

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Quick Start for Handheld Links

Before you install ACT! Handheld Links, make sure that you have the correct versions of ACT! contact management software, Palm OS® or Pocket PC, and Palm HotSync® Manager, Microsoft® ActiveSync®, or Windows Mobile® Device Center. You also should set up and synchronize your handheld device, and back up your ACT! database.

This chapter includes system requirements and instructions for installing and running ACT! Handheld Links.

System Requirements

Before you install ACT! Handheld Links, you should make certain that your personal computer and your handheld device meet the requirements to run the software. This section outlines those requirements.

Desktop Requirements

To use ACT! Handheld Links, you must have ACT! 2009 installed and meet its system requirements. For more information, see www.act.com.

See the following handheld device requirements for the product you are installing.

Palm OS Device Requirements

You need the following Palm OS hardware and software:

- A Palm OS handheld device
- Palm OS 3.5-5.4.x
- A 33 MHz or higher processor
- At least 8 MB of device RAM
- At least 500 KB of free space plus 1 KB for each contact
- Palm HotSync Manager 3.5 or 4.1.0

Pocket PC Device Requirements

You need the following Pocket PC or Windows Mobile hardware and software:

- A Pocket PC handheld device
- Pocket PC 2000/2002/Phone Edition (Windows CE 3.0); Windows Mobile 2003 (Windows CE 4.0 and 4.20.0); Windows Mobile (all editions)
- A 133 MHz or higher processor
- At least 16 MB of device RAM

- At least 500 KB of free space plus 1 KB for each contact
- Microsoft ActiveSync 3.5 - 4.5 (Windows XP operating systems only)
- Windows Mobile Device Center (Windows Vista™ operating systems only)

Installation

You can install ACT! Handheld Links from a file you download or from the product CD. In either case, a Setup wizard guides you through the installation process.

The next sections explain how to install ACT! Handheld Links and select a database.

Before You Begin

Before installing ACT! Handheld Links, you must uninstall any other products that synchronize contact, calendar, or task information with your handheld device.

Caution: If you do not uninstall these products, you may experience data duplication or data loss.

Installing ACT! Handheld Links

To install ACT! Handheld Links

1. Insert the ACT! CD into the CD drive.

The installation program starts automatically. If it does not, double-click the My Computer icon on your Windows desktop. Locate the CD drive in the window, double-click the drive letter to display the contents of the CD, and then double-click SETUP.EXE.

2. Click **Software for Handhelds**.
3. Click **Install ACT! Link for Palm OS®** or **Install ACT! Link for Pocket PC**.
4. Follow the instructions on the screen.

Selecting a Database

When you install ACT! Handheld Links, you specify an ACT! database to use. You can select a different database later if you choose. For more information, see "Changing databases" in Help.

Each time you select an ACT! database, a Desktop Overwrites Handheld procedure occurs. A Desktop Overwrites Handheld procedure replaces all of the contact and activity data on your handheld device with ACT! contact and activity data.

Synchronization is governed by the user roles defined in the ACT! application. See the *ACT! User's Guide* or ACT! Help for more information about user roles. The following table outlines the synchronization security for different user roles.

User role	Can synchronize by default	ACT! Administrator must grant permission	Cannot synchronize
Administrator	X		
Manager	X		
Standard		X	
Restricted			X
Browse			X

To select a database

1. Select or browse to the ACT! database you want to use.
2. Type the username and password, if required, for that database.
3. Click **Next** twice.
4. Click **Finish**.

Once you specify a database, the application does the following:

- Validates your username and password by logging into the database.
If your username or password are invalid, you must re-enter them or choose another database.
- Enables synchronization for the database you selected.
You must have permission in the ACT! application to synchronize for this task to occur. If you do not have permission to synchronize, request it from your Administrator.
- Specifies the contacts that will synchronize by creating a default Sync Set:
 - If your database contains 2500 or fewer contacts, all contacts that you have access to will synchronize.
 - If your database contains more than 2500 contacts, only the contacts you are the Record Manager for will synchronize.

For more information on Sync Sets, see Help.

Running ACT! Handheld Links

The first time you synchronize your handheld device after installation, the ACT! application copies data to your handheld device. Help tells you about:

- The synchronization process and how it affects your ACT! database.
- Changing databases.
- Setting filtering for the synchronization of notes and histories.
- Mapping fields in your ACT! database to your handheld device.
- Working with ACT! contacts on your handheld device.
- Working with ACT! activities on your handheld device.