

ACT! Handheld Links Start Here

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 or Microsoft® ActiveSync®. 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, your personal computer must meet the following software and hardware requirements:

- Microsoft® Windows® 2000, XP, or Server 2003
- ACT! 2007. If you have a previous version of the ACT! software, you will need to upgrade to ACT! 2007 before installing this software.
- Internet Explorer 5.5 or later
- 266 MHz processor
- 256 MB of RAM
- 50 MB of free hard disk space
- VGA or higher monitor resolution
- CD-ROM drive

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
- At least 2 MB of storage capacity on the handheld device
- Palm OS 3.5-5.x
- Palm HotSync Manager 3.5-4.x

Pocket PC Device Requirements

You need the following Pocket PC hardware and software:

- A Pocket PC handheld device

Note: ACT! Handheld Links Link for Pocket PC is not compatible with Smartphone Operating Systems.

- At least 2 MB of storage capacity on the handheld device
- Pocket PC 2000/2002/Phone Edition (Windows CE 3.0) or Windows Mobile 2003 for Pocket PC (Windows CE 4.0)
- Microsoft ActiveSync 3.5 - 3.7

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! Handheld Links 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**, and then click **Install ACT! Handheld Links**.
3. 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 database" in the online 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! 2007 User's Guide or online 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**.
4. (Optional) To set advanced options for synchronizing, click **Edit Sync Set**. For more information on advanced options, see the online Help.
5. Click **Next**, and then 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 according to these rules:
 - 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 for which you are the Record Manager will synchronize.

For more information on Sync Sets, see the online Help.

Running ACT! Handheld Links

The first time you synchronize your handheld device after installation, the ACT! application copies data to your handheld device. The online 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.
- Working with ACT! contacts on your handheld device.
- Working with ACT! activities on your handheld device.