

The Unofficial Guide to Using Outlook with ACT! by Sage

Who This Guide is For

This guide was written both for recently new ACT! users who have a general understanding of the basics as well as experienced ACT! users who may not be aware of the full capabilities of integration between Outlook and ACT! The basis of this guide is ACT! 2010 and most of the features are in ACT! 2009 as well. Earlier versions may not have some of these features or have slightly different screens than those shown.

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Why Integrate ACT! With Outlook?

The reason for using ACT! with Outlook is pretty simple – it allows you to keep your contact information and calendar all within one centralized system while allowing you to continue to use a robust, industry-standard e-mail client to perform e-mail related functions.

The key benefits of this are:

- You get to use a reliable, full-featured e-mail client that is used by millions
- You don't need to manage a separate contact list inside of Outlook
- You can keep records of sent e-mails within your ACT! database, right next to other communication history like phone call and meeting details
- Integrated functionality allows you to create contacts and activities directly from e-mail messages

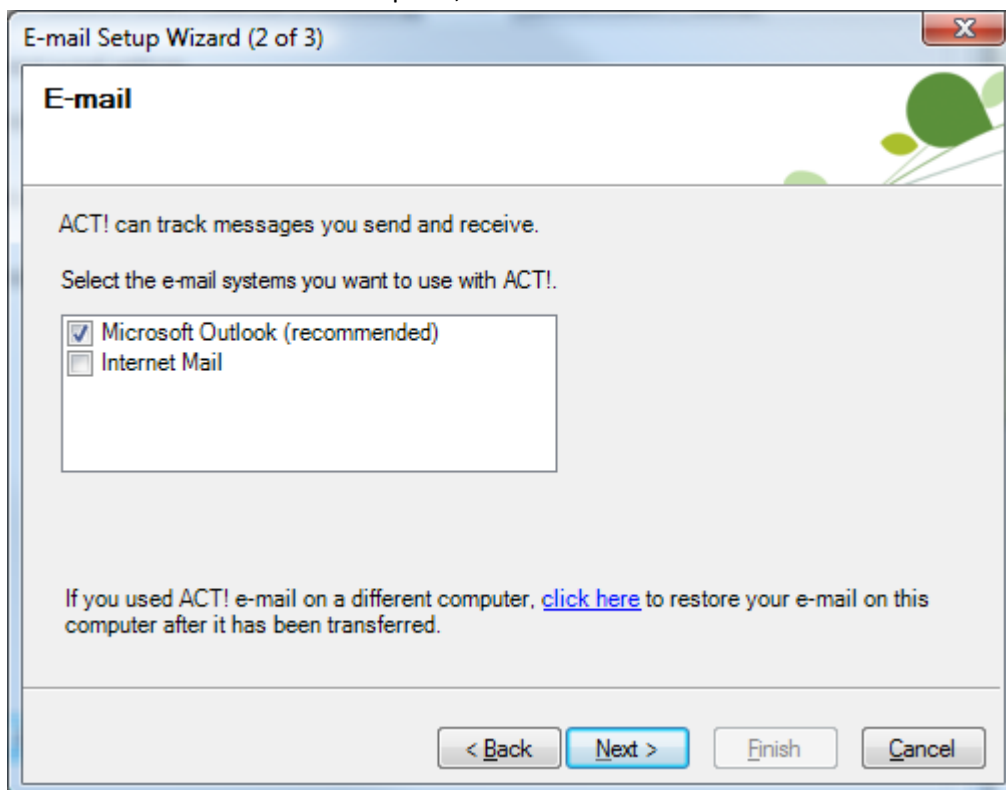
Setting Up Your Integration

Set the ACT! Preferences

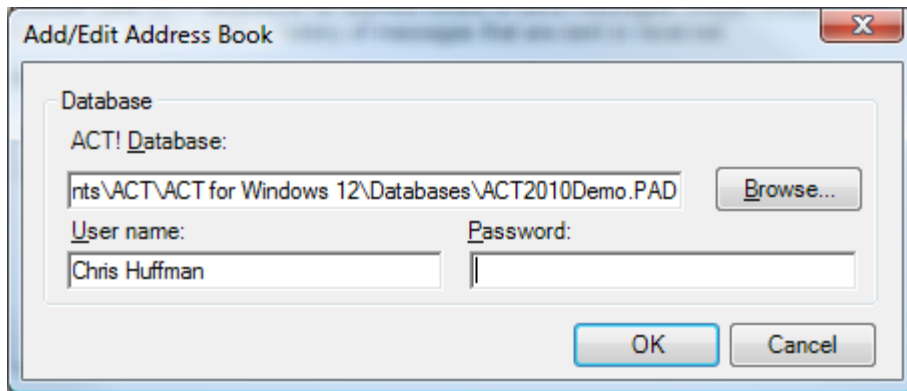
The first thing that you need to do in order to enable integration between ACT! and Outlook is to run through the e-mail configuration wizard.

To do this:

1. From the Tools menu, choose Preferences
2. On the Preferences window, choose the E-mail tab
3. Click "E-mail System Setup"
4. Click "Next" to skip the Welcome screen
5. Check the "Microsoft Outlook" option, then click Next

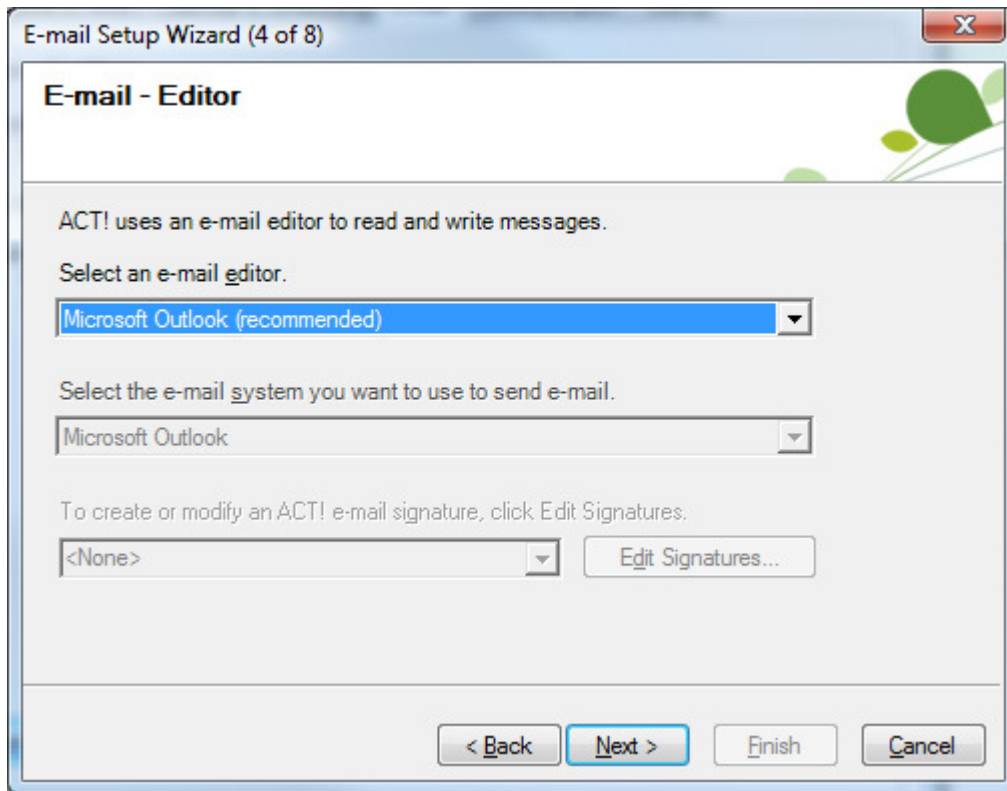


6. On the "Outlook Address Books" screen, click the "Add..." button
7. Your ACT! database and username should already be filled in, if not enter them and enter your password and then click OK.

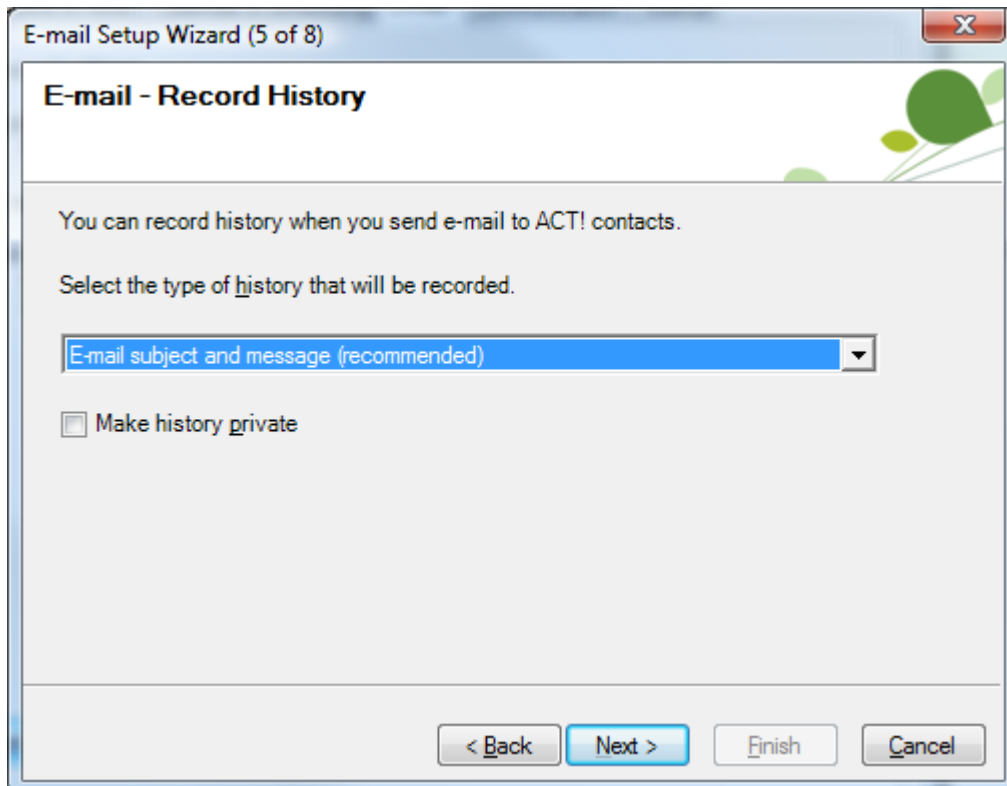


8. Click Next

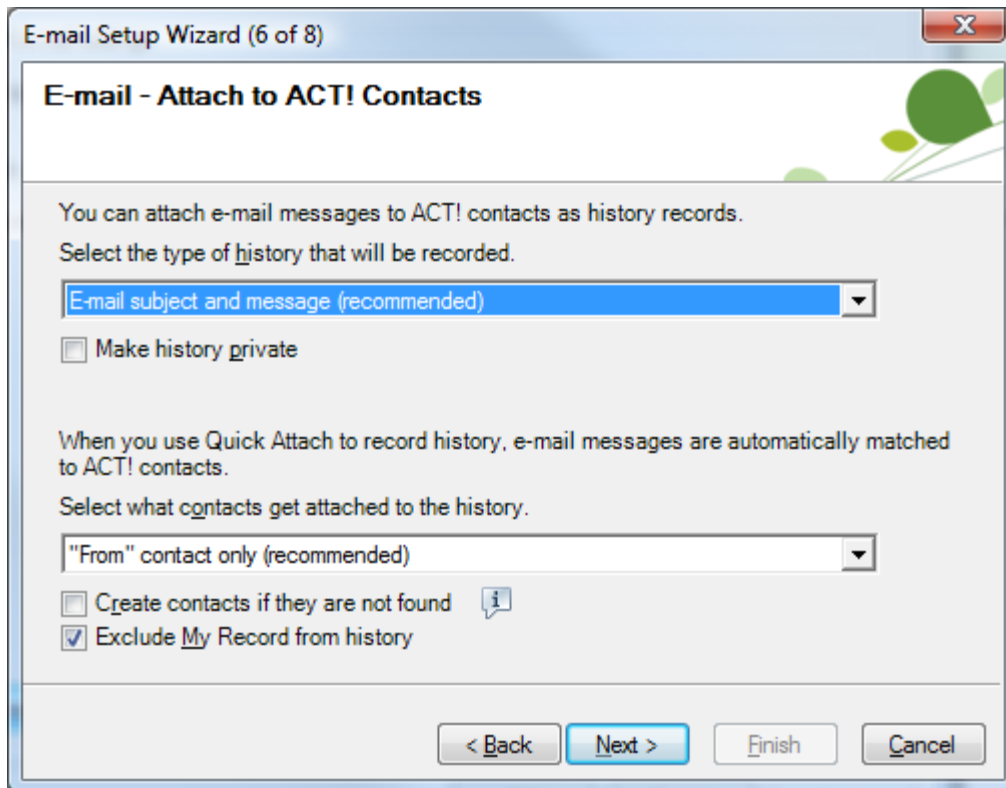
9. On the “E-mail Editor” screen choose “Microsoft Outlook” and click Next.



10. Choose what type of history you want to record when sending e-mail from the available options. For a thorough explanation of the differences, see “E-mail History Types” in the section below. Note two things here: This preference is only for e-mail you are *sending* and that choosing “none” means to not record history, by default. (Click Next once selected)



11. Next, choose what type of history you want when you attach an e-mail message. This applies to e-mails that you *receive* or that you manually attach from inside of Outlook. I recommend you keep this option the same as the previous selection, for consistency.



12. The second option on this screen is to choose who to attach a message to when you attach a received e-mail message using the Quick Attach feature (covered later in the guide). Most people want to attach the message to the person the e-mail is from, and not everyone it was sent to, so the default of “From” contact only is recommended. Click Next!

E-mail Setup Wizard (6 of 8)

E-mail - Attach to ACT! Contacts


You can attach e-mail messages to ACT! contacts as history records.
Select the type of history that will be recorded.

E-mail subject and message (recommended)

Make history private

When you use Quick Attach to record history, e-mail messages are automatically matched to ACT! contacts.
Select what contacts get attached to the history.

"From" contact only (recommended)

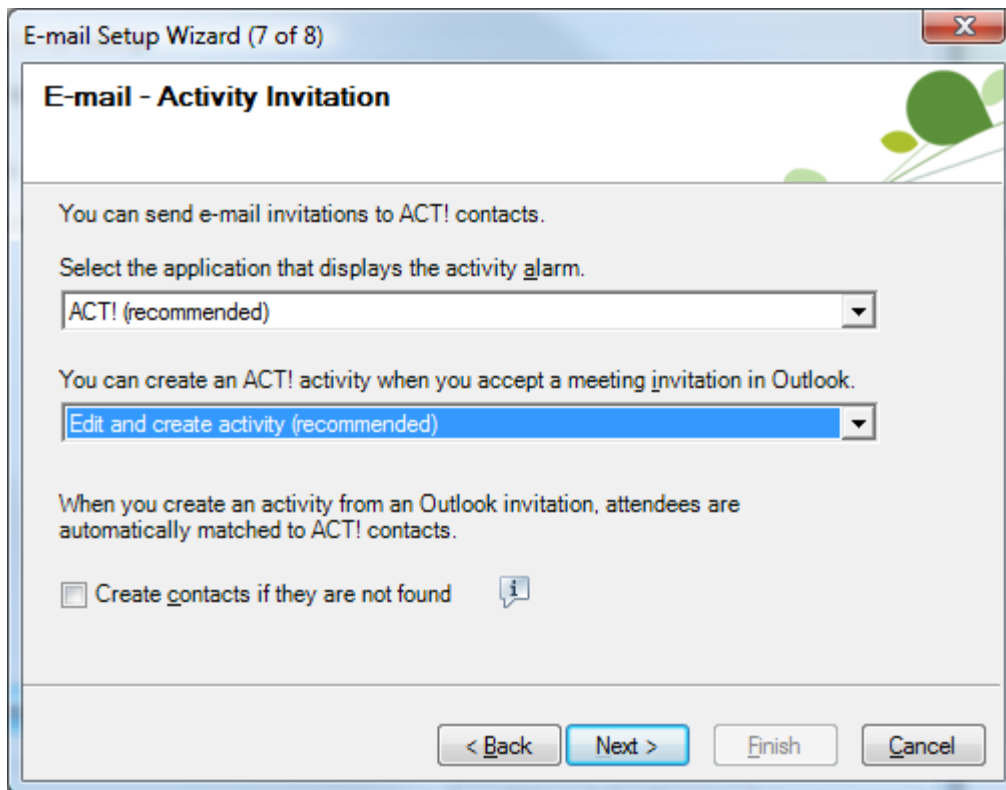
Create contacts if they are not found 

Exclude My Record from history

< Back Next > Finish Cancel

13. Choose your options for Alarms and accepted meeting invitations. These are pretty self-explanatory. When you send and accept meeting invitations using ACT! and Outlook you can decide which (or both) program will show the alarm. The second lets you choose if you would like to create an activity in ACT! when you accept a meeting invitation in Outlook. The Edit and Create option allows you to see the activity and review it before it gets written to your schedule.

The “Create contacts” checkbox lets you create a new contact automatically if you attach a message to ACT! but that contact is not found. This could be handy but will often result in duplicate records when the same person sends you mail from multiple e-mail addresses, so I recommend leaving it unchecked. Click Next!



14. Click Finish and you're done setting up the integration. If you have Outlook open, close it and reopen it to allow the changes you've made to take effect.

E-mail History Types

The following types are available to choose when deciding on how you would like your e-mail to be recorded.

E-mail subject only will simply record the date and time of the e-mail, which ACT! user sent it, and what the subject line way, nothing else. You will not see the message body and only know that an e-mail was sent.

E-mail subject and message will include the date and time, the ACT! user who sent it, the subject line, as well as the details of the message body. The message body will be viewable inside of ACT! by selecting it on the history tab so that ACT! will display it in the preview pane on your screen.

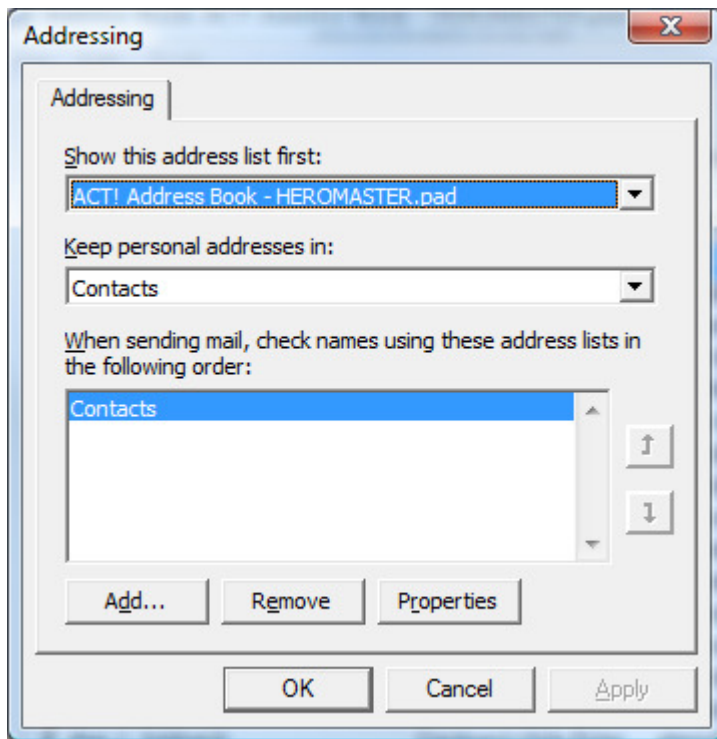
E-mail subject, message, and all attachments includes a copy of the original message. From ACT! you'll see the date and time, the user, and the subject. By double-clicking the e-mail it will open the message copy inside of Outlook and you'll even be able to access the attachments. The trade-off here is that there is no preview inside of ACT!, you'll have to open the message to see what it says besides the subject.

Keep in mind that while ACT! will ask you to select a default, these can be changed and you can even change the setting for individual messages that you are sending. Received messages attached always use the default setting.

Set up the Default Address Book in Outlook

When you configure Outlook integration with the wizard in ACT! as outlined in the section above, it prompted you to create an Address Book within Outlook. If you have more than one address book, you may want to change which one is the default. Typically it will be ACT! but here's how to check it out:

1. Inside of Outlook, click Tools and then Address Book
2. Inside the Address Book window, click Tools, then Options
3. In the "Show this address list first" dropdown, choose whichever you want to be the default address book – this will be the list of contacts you see initially when you click the "To" button when writing a new e-mail message.



4. Click OK and then close the Address Book window.

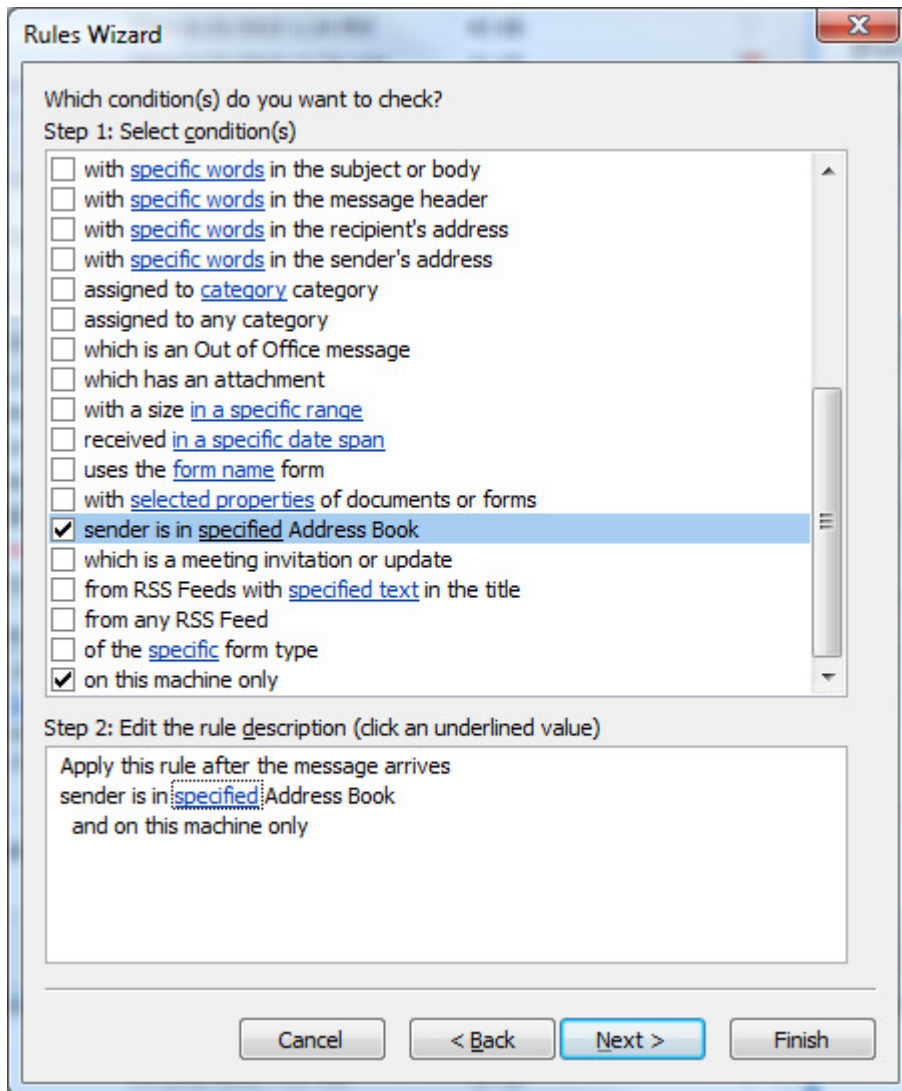
Automatically Attach E-mail

In ACT! 2009 and later you have the ability to automatically attach incoming e-mail. It's not something I recommend for most users to set up, but in some cases where it is desired for compliance or other reasons it can be helpful. The reason I don't recommend it for most is that your history will be most useful if you only attach relevant, important e-mails to your database and not every single message. Attaching all messages also has the potential to make your database huge and could potentially cause performance issues if others are synchronizing with your database.

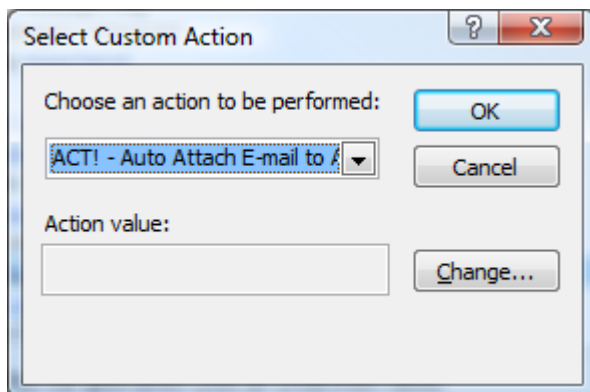
Here's how to do it:

1. In Outlook, from the "Tools" menu click "Rules and Alerts"
2. Click "New Rule"
3. In the "Step 1: Select a template" list choose "Check messages when they arrive" (in the "Start from a blank rule" section) and click Next.

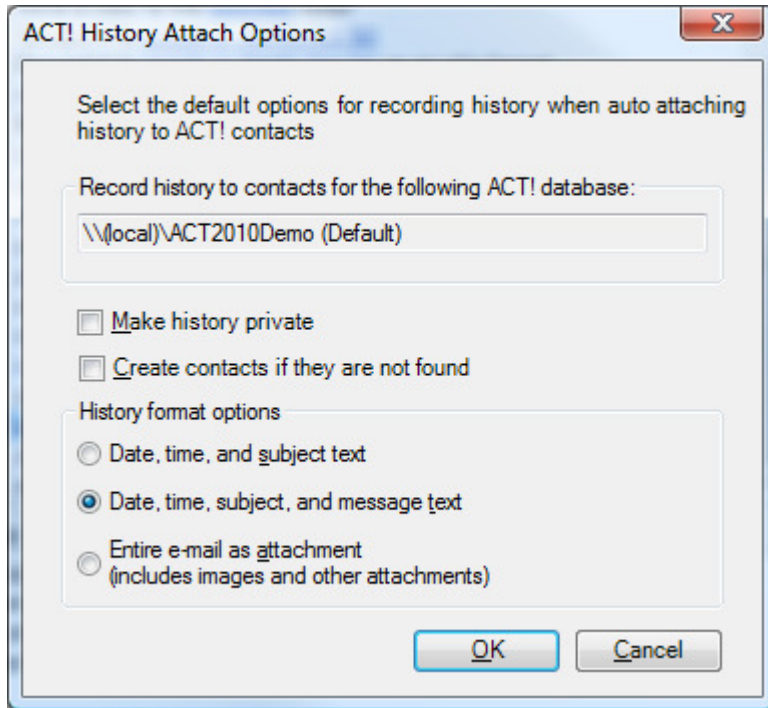
4. Check off the “sender is in specified Address Book”



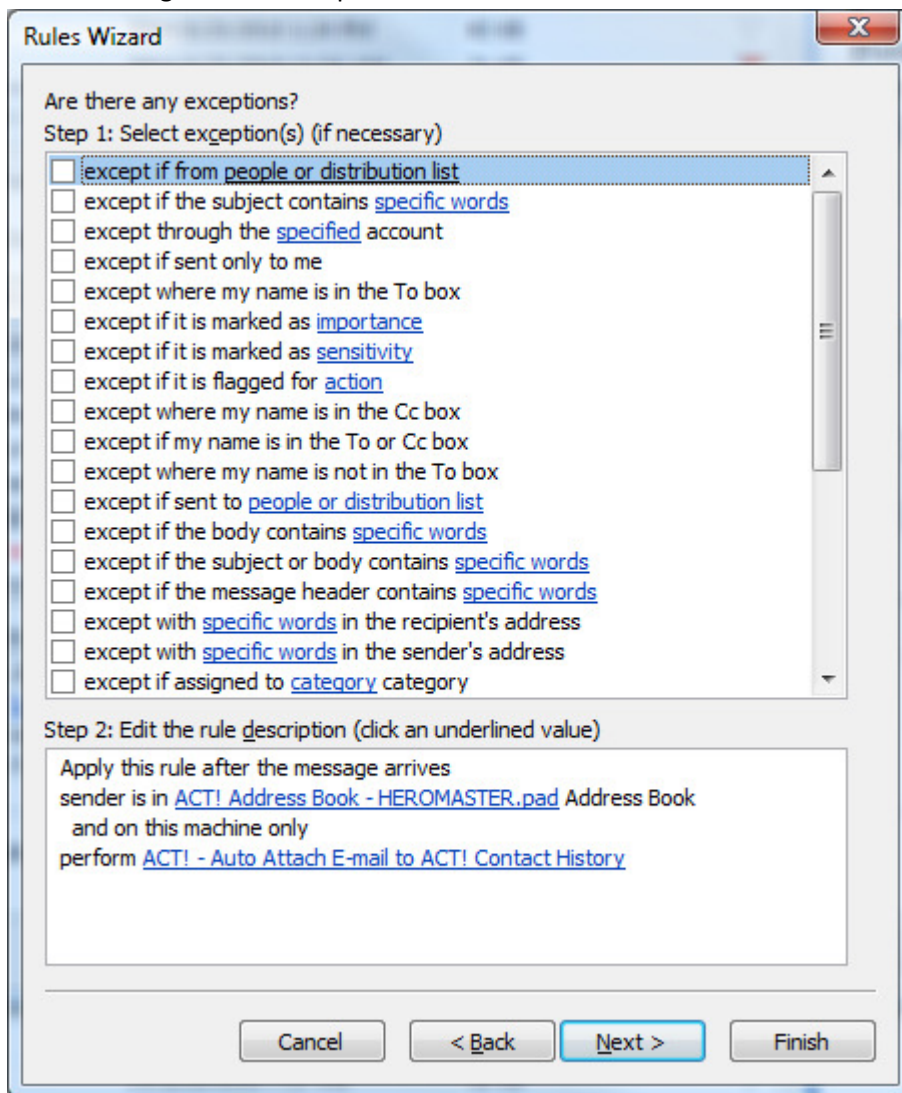
5. Click the blue text “specified”, choose your ACT! Address Book, then click “Add”
6. Click Next
7. In “Step 1” check the “perform a custom action” option, then click on the blue “a custom action” text in “Step 2”
8. Choose “ACT! – Auto Attach E-mail to ACT!” and then click “Change”



9. Uncheck the “Make history private” option (unless you want it to be) and then choose the desired History format option and click OK. (and click OK again)



10. Click Next to get to the exceptions screen:



11. In the exceptions screen you can either click Finish to complete the rule or you can make exceptions to fine-tune what you will record. For example, you could set it to not record large attachments (set the “except with size in a specific range” option for this)

12. Click Apply and you're done!

Using ACT! to Send E-mail to a Single Contact

Once you've got the e-mail configuration complete you can begin to use Outlook to send messages via ACT! This section will provide you with a quick overview of the different options available to send an e-mail to one contact at a time.

Create a New E-mail Message

If you'd like to simply create a new Outlook message for a single contact, navigate to the contact you want to send to and then do any of these three:

- Click the contact's e-mail address on their contact record (it shows as a blue hyperlink)
- Click the Write E-mail button
- Choose “E-mail message” from the Write menu

Any of these three options do the same thing – they'll simply launch a new message window in Outlook with the contact's name and e-mail address already filled in for you along with any signature or default formatting you've set up in your Outlook.

For options regarding recording and history, see "E-mail Recording Options" in the "ACT! Features Within Outlook" section.

Create a New E-mail Message From a Template

ACT! allows you to create an e-mail message using a template. Templates save you time and allow you to pull information from the contact's record like their name, address, and even custom fields you've added to your database. You can create templates and use them with Microsoft Word (for print) or Microsoft Outlook, for e-mail. If you'd like to learn how to create a template, check out this article on the Sage Knowledgebase:

http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser_popup_adp.php?p_faqid=13834

Here's how to create an e-mail from a template:

1. Navigate to the contact
2. From the "Write" menu, choose "E-mail message (from template)"
3. Choose the template you'd like to use and click Open

ACT! will merge in field information from the current contact's record and then display the new message window. You can either send it as it or make any edits you want first.

Also note that you can certainly add additional contacts in the To, Cc, or Bcc fields.

Using ACT! to Send E-mail to Multiple Contacts

In addition to sending e-mail to contacts one at a time, there are a couple methods that let you send a message to multiple contacts at once.

Create a New E-mail Message

Just like creating a new, blank message for a single contact, you can address a new e-mail message to multiple contacts by:

- Creating a lookup of contacts or simply going to the Contact List View (F8)
- Tag the contacts you want to send the e-mail to by either turning Tag Mode on (checkbox) or just hold the Ctrl key while you click each contact you want to send to
- From the Write menu, select "E-mail message"

**** Big Huge Important Note:** Make sure NOT to use "E-mail message (from template)" for this part or else ACT! will actually do an e-mail merge and not give you a chance to preview or edit the message before sending. The e-mails will fly out to your drafts folder and stand a chance of automatically being sent. Consider yourself warned!

Create a Mail Merge

The mail merge functionality of ACT! can be used to merge contact information into templates and send a separate, uniquely addressed e-mail to each contact included in the merge. It works just like sending a template to a single e-mail except that:

- You won't be able to edit the e-mail contents (so make sure your template is complete!)

- The messages will go to your drafts folder and then be sent the next time Outlook does a send/receive

To create a mail merge:

1. Plan to do a test run – before actually completing this with your list, send the message to yourself and perhaps a co-worker as well.
2. Make sure your template is good to go and exactly the way you want it to be sent
3. Create a lookup of the contacts you want to send the mail merge to
4. Do the merge:
 - From the “Write” menu in ACT!, choose “Mail Merge”
 - Click “Next” to skip the welcome screen
 - Choose “E-mail” and click “Next”
 - Hit the “Browse” button and select your template, then click “Next”
 - Select “Current lookup” and click “Next”
 - Enter the subject line and select the e-mail record history type you’d like to use (see the “E-mail history types” box earlier in this guide for an explanation)
 - If you wish to send an attachment with the e-mail (same attachment for all recipients) click the “Add” button and choose your file.
 - “Return Receipt” will request that each user opt to send you a return receipt once they’ve read your message
 - Click “Next”
 - Choose what ACT! should do if you’ve selected anyone with no e-mail address. If you don’t care that some might be missing their e-mail address, choose “Omit those records from the e-mail merge” else I suggest the last option which will stop the merge and show you who is missing an address.
 - Click “Finish” to complete the merge

Best Practices for Mail Merges

Here are some useful tips to keep in mind when working with mail merges:

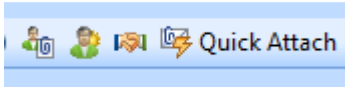
- Some users report Outlook crashes when sending merges to large numbers of ACT! contacts. Try to keep your merges to somewhere around 50 contacts or less. Your mileage may vary.
- If you are sending large numbers of e-mail merges, you increase your risk of being flagged for sending spam, which can lead to your recipients not getting your message. Consider an e-mail marketing service like Swiftpage / ACT! E-marketing for sending blasts to large groups.

ACT! Features Within Outlook

Once you’ve successfully configured e-mail integration with Outlook in the ACT! preferences and restart Outlook, you may notice you’ve got some new icons and features. ACT! integration provides a number of convenient ways to enhance productivity and give you flexible control over what e-mail gets recorded to history.


The ACT! Toolbar


The most obvious sign of ACT! and Outlook integration is the appearance of the ACT! toolbar inside of Outlook, which adds four new buttons to the mail screen.



These buttons will be enabled whenever you are in the main screen of Outlook and have an e-mail message selected. They are, in order from left to right:

- “Attach to ACT! Contacts”
- “Create ACT! Contact”
- “Create ACT! Activity”
- “Quick Attach”

Attach to ACT! Contacts  will prompt you to choose one or more ACT! contacts that you would like to attach the selected message to. By default, it will select a contact from ACT! if it finds someone whose e-mail matches the e-mail address of the selected message. Choose which contact(s) you want to attach it to and click OK. Most often you’ll use “Quick Attach”, but this feature is handy when the contact you wish to attach to and message sender are not the same person, or the sender used an e-mail address which is not their usual one.

Create ACT! Contact  is a shortcut to create a new contact record from a selected e-mail message. Unfortunately, the sender’s name and e-mail address are all that ACT! can glean, so it will ask you to fill in the rest.

New Contact

Select ACT! Database
\\local\ACT2010Demo (Default)

Contact Data

Company:

Contact: Molly Gordon

Title

Phone Ext:

Phone/E-mail Business Address


Mobile:

Fax:

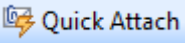
E-mail: molly@authenticpromotion.com

Website:

Private

Create ACT! Activity  lets you quickly create a new activity in ACT! from the selected e-mail message. ACT! will attempt to match a contact with the e-mail sender and default the activity to that contact, as well as fill in the

regarding line with the e-mail's subject and details with the e-mail's body. You can edit whatever you like, including the activity type, date, time, etc. and then click OK to complete the scheduling.

Quick Attach  looks for a contact whose e-mail address matches that of the selected messages sender and then attaches the e-mail message to it. Messages that don't find a matching contact get sent to **e-mail purgatory**. (see below)

E-mail Purgatory is my nickname for where e-mail messages go that should have automatically attached but they didn't because there was no matching e-mail address in your database. You'll see it show up after you've started using ACT! and Outlook, it shows in your system tray as an envelope icon with a red X in front of it.



Right-click it and choose "Show Progress" to view the progress of attaching e-mail.

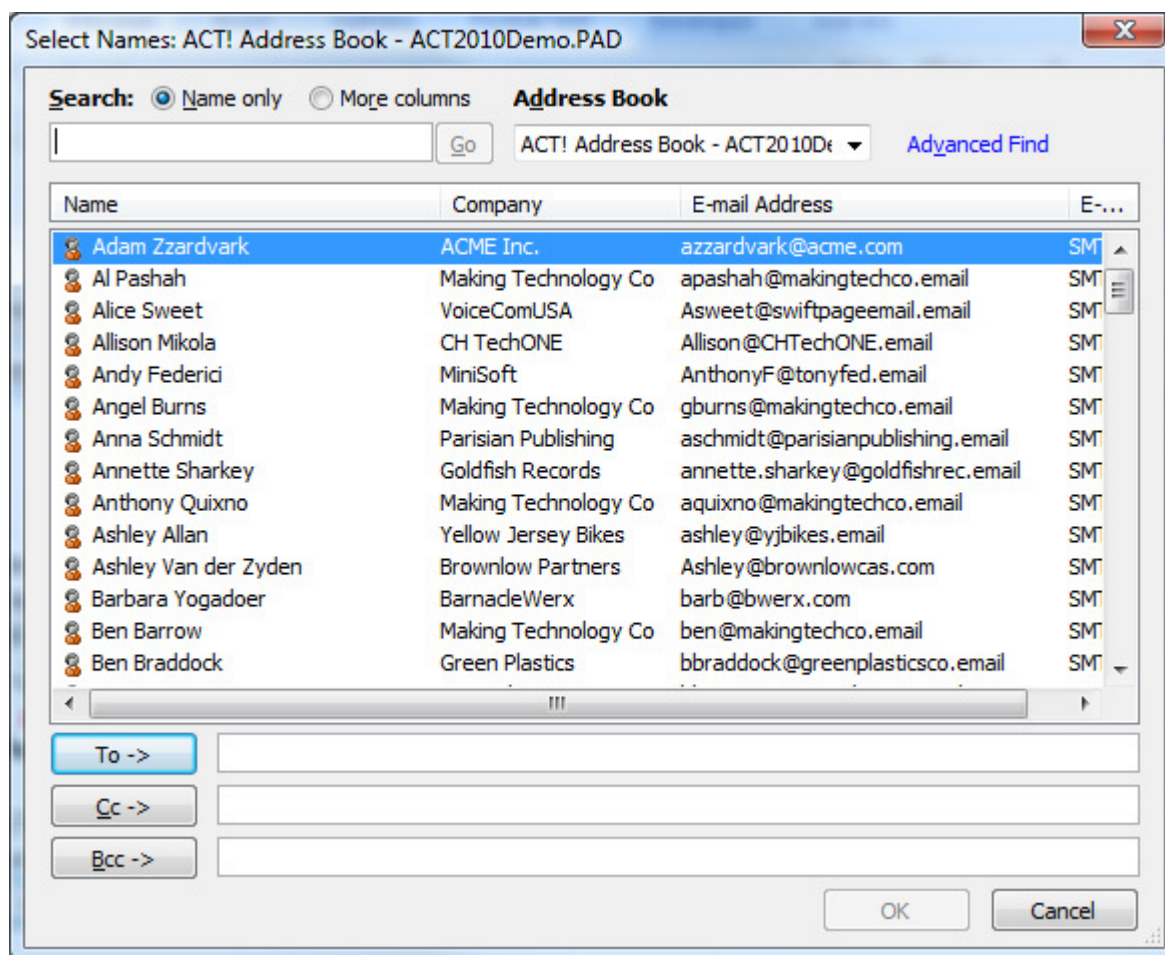
Notice especially the "Not Attached Messages" tab that shows messages that haven't been attached. Your options are to "Retry Attach" (which works if you've since created the contact or entered the e-mail address in question), "Attach to ACT! Contact" (to do it manually), "Attach to New ACT! Contact..." (to create the contact and attach) or "Remove" to get rid of it.

These messages on the "Not Attached Messages" tab go away after being there 15 days, which is the default that you can change on the "Advanced" tab.

The ACT! Address Book

When you create a new message with Microsoft Outlook, you now have access to your contact list by clicking the "To" button and selecting one or more contacts. All contacts that have an e-mail address in ACT! will show here.

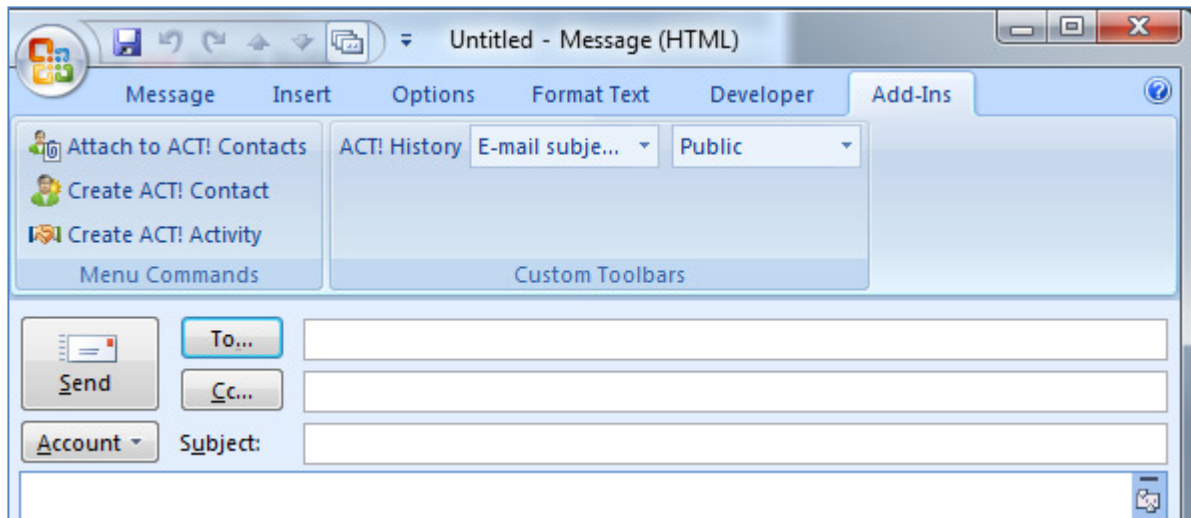
If you don't see your list of contacts, check that the Address Book selected in the upper-right begins with "ACT! Address Book". If the ACT! Address Book is not the default and you'd like it to be, see the section "Set Up the Default Address Book in Outlook"



E-mail Recording Options

When you send an e-mail from Outlook, it will attempt to record it against an ACT! contact so long as you've set up your ACT! e-mail preferences to something other than "None", even though you may not have used ACT! to create the message.

If you want to change your history recording option for *just this message* then look for the "ACT! History" dropdown on the toolbar in the e-mail message window. In Outlook 2002 and 2003 it's pretty easy to find. In Outlook 2007 it's hidden on the Add-Ins tab.



Simply change the option to “None” if you don’t want to record the message or perhaps “E-mail subject, message, and all attachments” if usually you don’t keep attachments but you want to for this one. Once you’re happy with your e-mail message and the option selected, click Send.

The second option, “Public” or “Private” will let you decide whether A) everyone who has access to this contact in ACT! should be able to see it or B) only the ACT! user who attached the e-mail will see it.

Third Party Tools

Here are some of the tools that I like and recommend for working with ACT! and e-mail that provide functionality beyond what is possible with native ACT! and Outlook.

Swiftpage E-mail (www.swiftpage.com)

Now built into ACT! 2010 and later and branded as “ACT! E-marketing”, Swiftpage allows you to create great looking HTML e-mail templates, have them delivered reliably, and be able to track results like who opened, read, and clicked on links in your e-mail messages. Service packages start at \$15/month.

ACT! E-mail Connect (www.actaddons.eu)

Allows you to do e-mail merges using additional e-mail fields, attach e-mails directly to groups and companies, attach to secondary contacts, and more.

Two More ACT! Tricks

Here are a two additional tricks that you might find useful.

Avoid Attaching E-mails to Users

A lot of ACT! users don’t like it that ACT! will attach sent e-mails to their co-workers when their e-mail is set up to attach outgoing e-mail to contact records. The ability to turn off attaching e-mails to ACT! users is not available in ACT! 2010 and earlier, but what you can consider doing as a workaround is simply to remove the e-mail address from each user record. This will prevent ACT! from finding a match and it will not attach the record.

Adding ACT! Contacts into Outlook

Some users like to have their contacts in Outlook for one reason or another – often it is because their mobile phone synchronizes with Outlook and they do not want to set it up with ACT! or do not have the right software to do so.

If you would like to quickly add all your ACT! contacts into Outlook, here's a way to do it:

1. Go into Outlook and select the "Tools" menu and then "Address Book"
2. Make sure the ACT! Address Book is the one selected in the dropdown in the upper right
3. Click the first contact in the list
4. Scroll down and hold Shift and click the last contact in the list – this should select all of them
5. Right-click the selected contacts and choose "Add to Contacts"

Written by Len Kamerman (lkamerman@yourcrmhero.com), provided by Hero Technical Solutions Inc.

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