

**The Official**  
**ACT!**  
by Sage  
**QuickStudy Guide**

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## You've Got Mail

E-Mail is becoming increasingly important in business. ACT! can integrate with your existing e-mail system so that you can easily send and receive messages directly from ACT!, record history of that communication, attach an e-mail to a record, create a new ACT! record from an e-mail, e-mail merge announcements to your clients and prospects, and so much more.

### Setting Up Your E-mail System in ACT!

ACT! can work with quite a few e-mail systems to send e-mail to one of your Contacts. ACT! supports Microsoft Outlook (starting with version 2002(XP), Outlook Express (starting with version 5.5), Lotus Notes (starting with version 6.5), Eudora Pro (starting with version 5.2), and the ACT! Internet mail client.

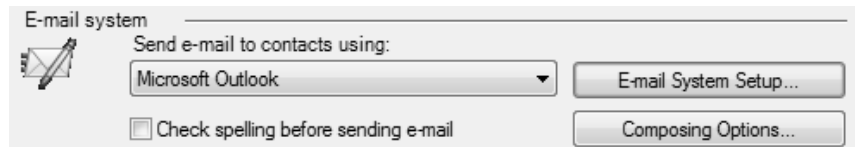
If you normally use another e-mail (like GroupWise®), you don't have to go out and buy another software to use ACT! and e-mail. All you need is Internet access and a POP3 account. ACT! also has a built-in SMTP/POP3 e-mail client that you can use to send and receive e-mail.

 However, if you use an e-mail software other than Outlook or the ACT! built-in e-mail client, some of the ACT! e-mail features are not available. For example, using other e-mail systems with ACT! limits your messages and mail merges to plain text (no html).

Although you may have already set up an e-mail system when you installed ACT!, let's look at the next section to see how to configure it.

### ...set up and configure your e-mail system

1. **Tools, Preferences...**, click the **E-mail** tab. If an e-mail system displays as shown below, skip to step 4 to configure ACT!.



2. Click the **E-mail System Setup...** button. Click **Next>** at the Welcome screen. Only e-mail software currently installed on your PC will display as available options.

**Select E-mail System –**  
Put a check next to your e-mail system and click **Next>**.

3. If you selected Microsoft Outlook, choose between...

**Use the ACT! e-mail program,**

or

**Use the Outlook e-mail program.**

If you normally use Outlook as your e-mail client, you will probably want to **select the second option** to Outlook. The only reason to **Use the ACT! e-mail program** as an interface between ACT! and Outlook is its ability to create an activity from a message or to send an ACT! Contact, Group, or Company to another ACT! user. You cannot use both the ACT! and Outlook e-mail programs.

### Use the Outlook e-mail program

- 3a. If you selected the first option, continue to step 4.

If you select **Use the Outlook e-mail program**, you will be prompted to set up the ACT! address book with Outlook.

Click **Yes**.

- 3b. If your database is not displayed, click **Add....**

- 3c. Browse to select your ACT! database and click **Open**.

Then enter your **User name:** and **Password**.

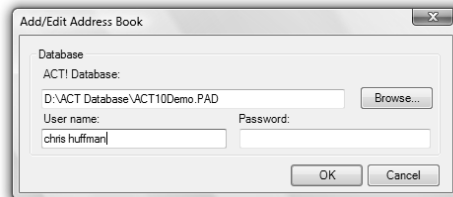
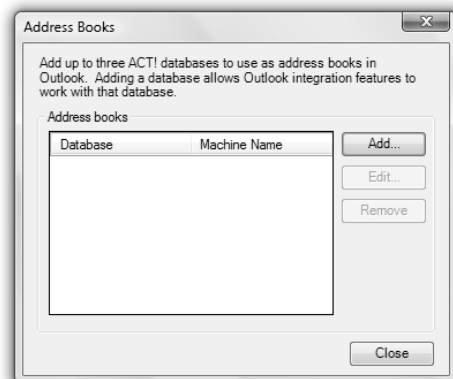
Click **OK**.

- 3d. Answer **OK** to acknowledge that changes will not take effect until Outlook restarts.

- 3e. Click **Close**.

- 3f. Click **Finish**.

- 3g. All other options are now grayed out. So click **OK**.



If you are using Outlook, then ACT! will use your default Outlook preferences (signature, spell check, etc.).


You're finished.


**Use the ACT! e-mail program**

4. If you select **Use the ACT! e-mail program**, continue to the next step.

4a. Click **Edit Signatures...** to create one or more signatures for your e-mails.

Click **Add**, enter a descriptive name. Enter text in **Edit Signature:**, as desired. Click **OK**

 Give each signature a descriptive name.

 Leave a blank line in front of your signature to separate it from the rest of your message. You can also copy and paste HTML code into the **Edit Signature:** box. This would allow you to reference pictures from a Web site. When you are pasting, keep in mind that a return (whether you entered it or the software program entered it) is read as a **<BR>**, so keep all relevant line code on one line. For example, use Notepad and disable **Format, Word Wrap**. (Only an HTML junkie would understand the previous paragraph ;-)

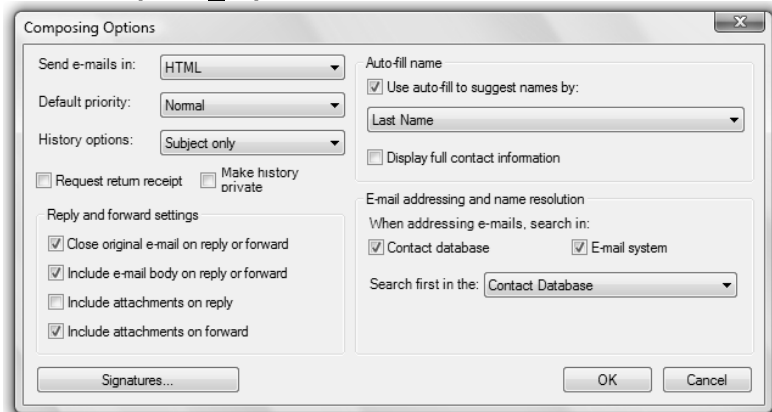
Then, select your default signature from the drop-down.

No need to change other options in this part of the wizard. Click **Next>** and **Finish**.

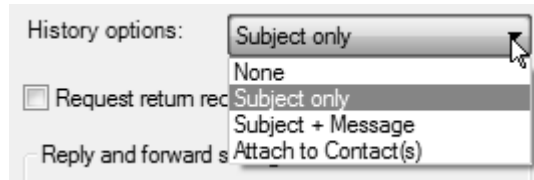
4b. It is highly recommended that you place a check in **Check spelling before sending e-mail**.

Nothing is more embarrassing than sending an e-mail full of spelling errors to a client.

4c. Click the **Composing Options...** button.



- 4d. The **History options:** you select as a default, determine what is recorded to either a Contact record or the My Record (if the e-mail address is not found in ACT!).



**None** would not record any history to the Contact's record (by default).

**Subject only** records the Date, Time, Subject, and Sender to the Contact's **History** tab.

**Subject + Message** records the text of the message in addition to the information captured by the Subject only option. This option allows you to instantly view the text of the message and will be synced to remote users. (Your signature text is also included with the message.)

**Attach to Contact(s)** saves a copy of the e-mail to the Attachments folder and places a shortcut to the e-mail in the Contact's **History** tab.

- 4e. Change other options as desired and click **OK**.

Back in **Preferences...**

- 4f. The **Folder settings** area is used when the preferred e-mail system is Internet E-mail. If you are using ACT!'s Internet E-mail, you may want to check all of the options. If you are using Outlook, Outlook Express, Lotus Notes, or Eudora, you might want to uncheck all options and let those program handle these settings.
- 4g. Select a default option for handling e-mail attachments. Defines how ACT! handles file attachments when you attach the message to a Contact record.
- 4h. Click **OK**.



*If you use Microsoft Outlook Express 6, you may receive a virus protection error message each time you send or receive e-mail using ACT!. Disable the message in Outlook Express by clicking **Tools, Options...**, clicking the **Security** tab, clear the **Warn me when other applications try to send mail as me**, and clicking **OK**.*

### **Understanding the ACT! E-mail Window**

If you are using Outlook for your e-mail (and you selected to **Use the Outlook e-mail program** instead of the ACT! interface e-mail window) then you can skip to page 180. However, if you are using ACT's e-mail program or Outlook Express or Lotus Notes, etc, then read on for a few pages.

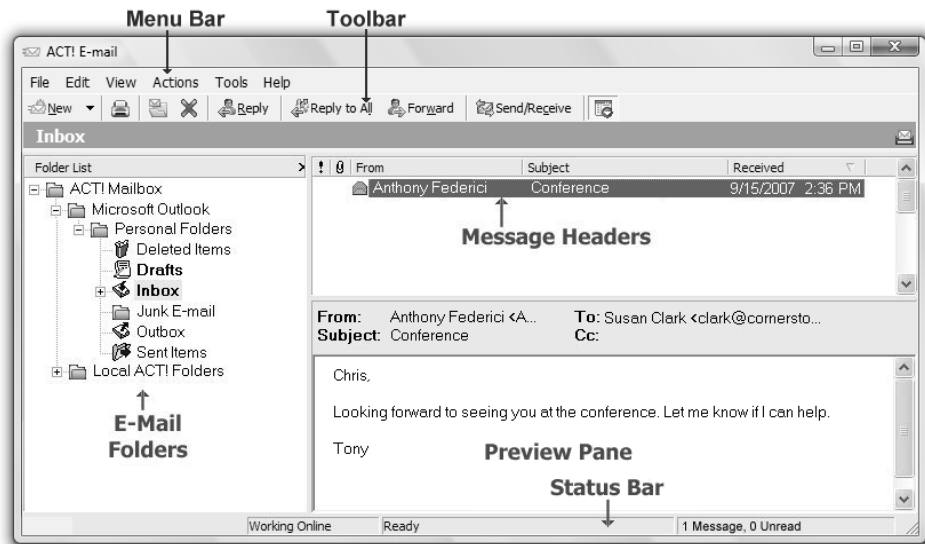


E-mail

ACT! has a separate e-mail window that displays when you click the **E-mail** icon on the Navigation bar at the left. While the Contact List, Groups, Companies, Task List, Calendar and Opportunity List views open into windows inside the ACT! program, ACT! E-mail opens into its own window with its own button on the Windows Task Bar.



When you open **ACT! E-mail**, the Inbox displays as it would in any e-mail software. The E-mail window is divided into three panes: the Folder List, the Message Headers list and the Preview Pane. The Status Bar at the bottom of the window indicates the total number of messages and those that remain unread in the selected folder.



If you have set up another e-mail software to work with ACT!, your default Inbox messages appear to be duplicated here. However, this is just an overlay view of your default e-mail software. If you delete an e-mail here, it is deleted in your regular Inbox.

While it is true that you can perform almost all standard e-mail functions (read, print, create new, move, delete, reply or reply to all, forward, along with a few other amazing features) from this window, you might want to minimize this window and continue to work in your regular e-mail software. Think of the ACT! E-mail window as a link between your ACT! Contacts and your default e-mail software. Just minimize it and let it do its work of linking.

There are a few things that you can only do in this window, so let's play with it a while.

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*The Official ACT! by Sage QuickStudy Guide – 2008 (10.0)*

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