

How to Install and Configure Microsoft® Outlook® as Your E-mail Client in ACT! by Sage Premium for Web

Question

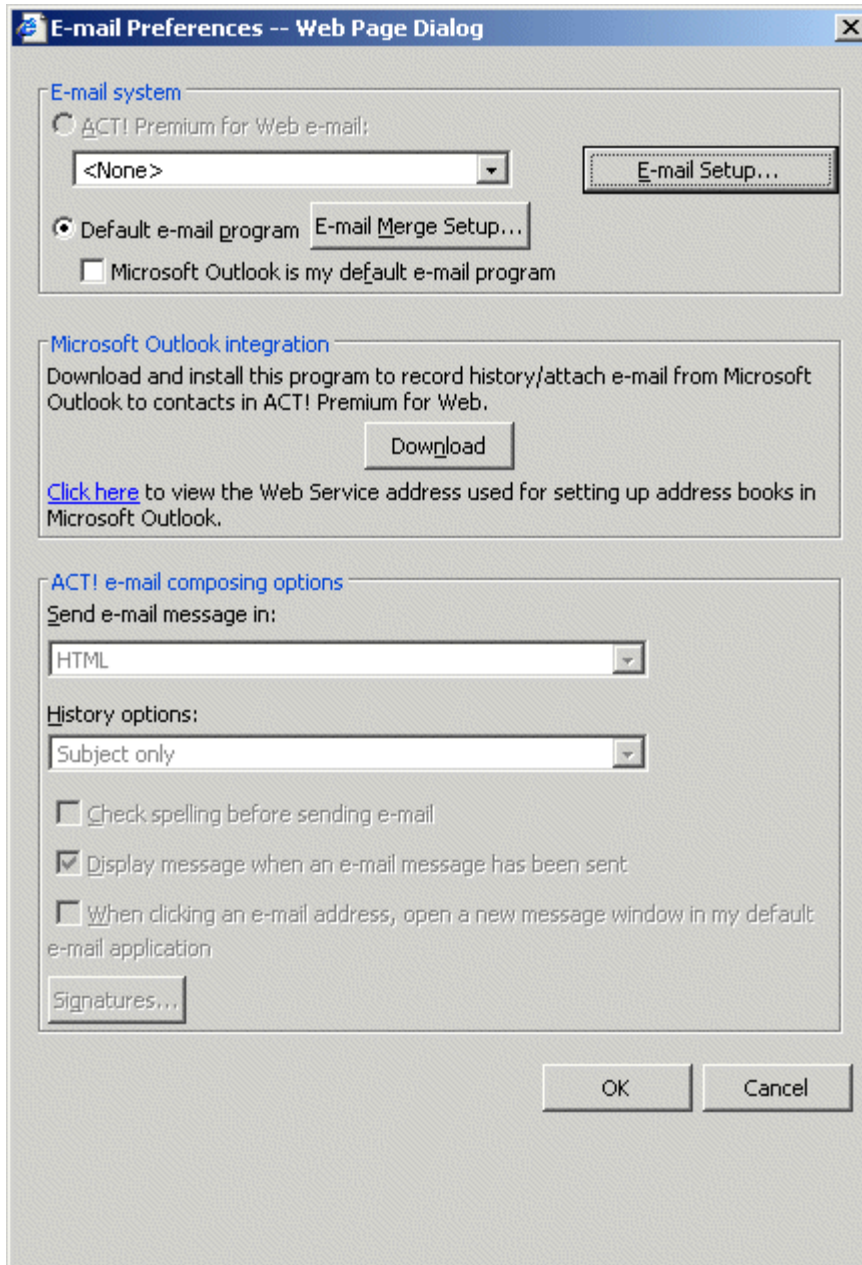
You would like to know how to install and configure Outlook as your e-mail client when you are using ACT! Premium for Web from the Web.

Answer

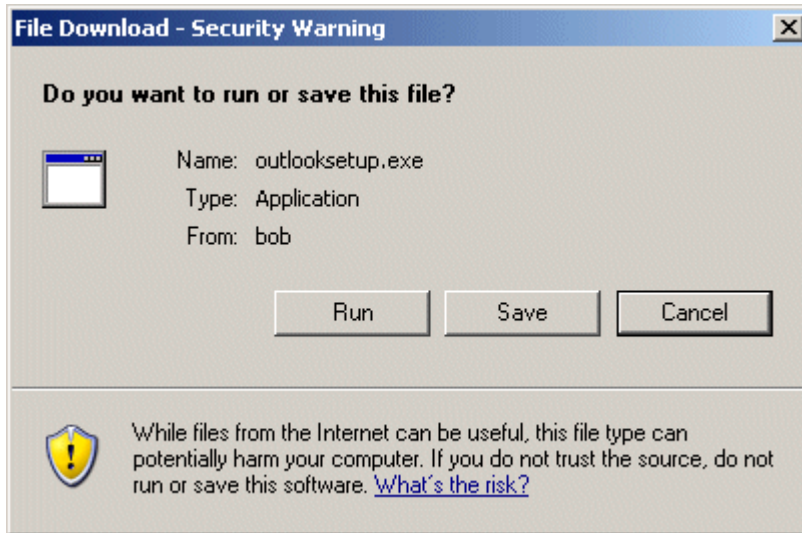
In order to use Outlook as your e-mail client in ACT! Premium for Web as a Web user you must download the Outlooksetup.exe file to record history/attach e-mail from Microsoft Outlook to contacts in ACT! Premium for Web. Add your ACT! database(s) as an Outlook address book(s), and configure the ACT! History Options in Outlook. Use the following steps:

Downloading and Installing Program:

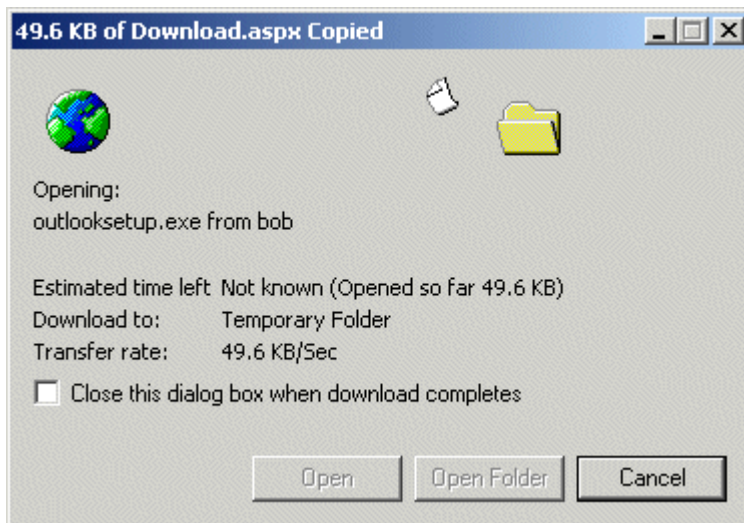
1. Launch Internet Explorer, browse to the ACT! Premium for Web login page, and then login to any database.
2. Click the Tools menu, and then click the Preferences option. The Preferences -- Web Page Dialog dialog box appears.
3. Click the E-mail option. The E-mail Preferences -- Web Page Dialog dialog box appears.



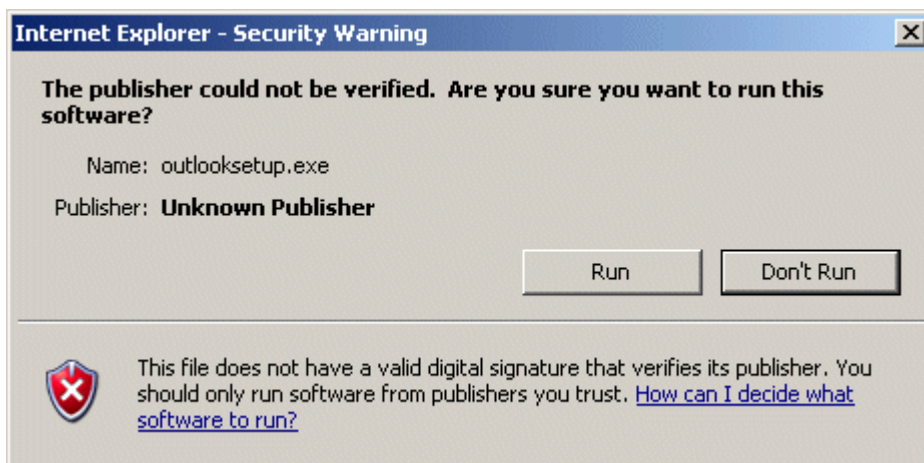
4. Click the **Download** button. The following **File Download - Security Warning** dialog box appears.



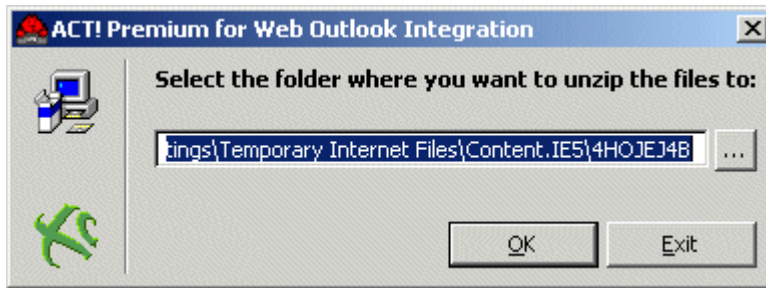
5. Click **Run**. The following **Download Status** dialog box appears.



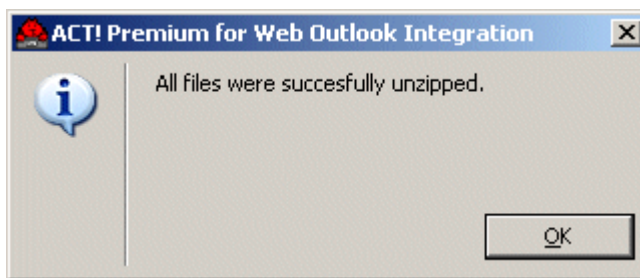
6. When the download is complete, The following **Internet Explorer - Security Warning** dialog box appears.



- Click **Run**. The following **ACT! Premium for Web Outlook Integration - Select the folder where you want to unzip the files to** dialog box appears.



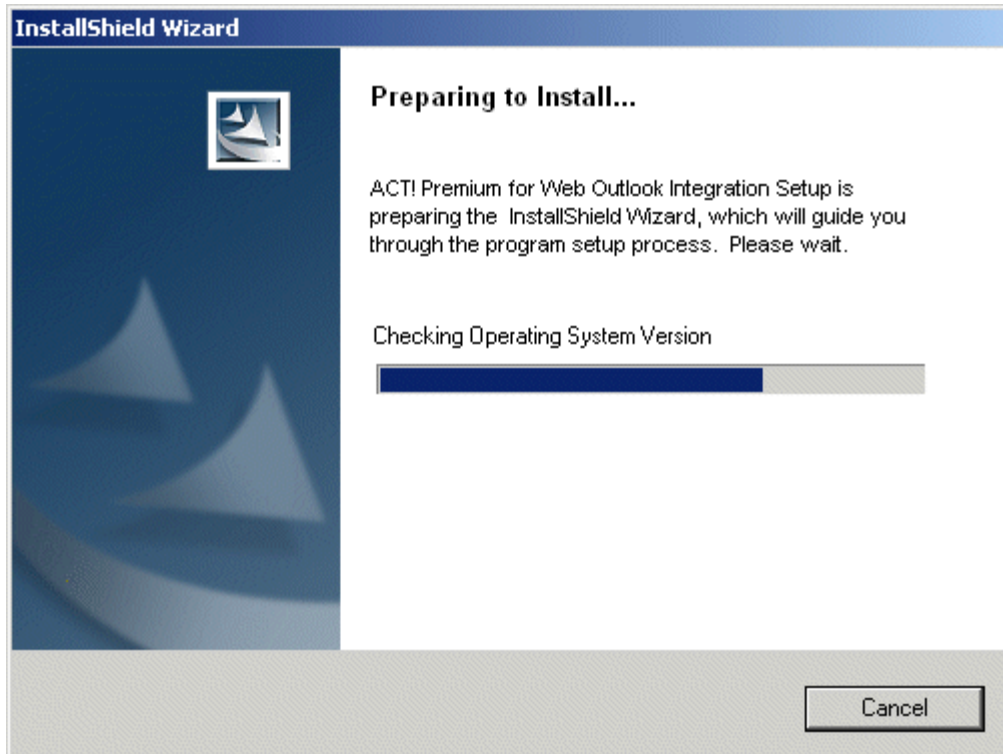
- Click **OK**. You will briefly see a progress indicator followed by the following **ACT! Premium for Web Outlook Integration** dialog box.



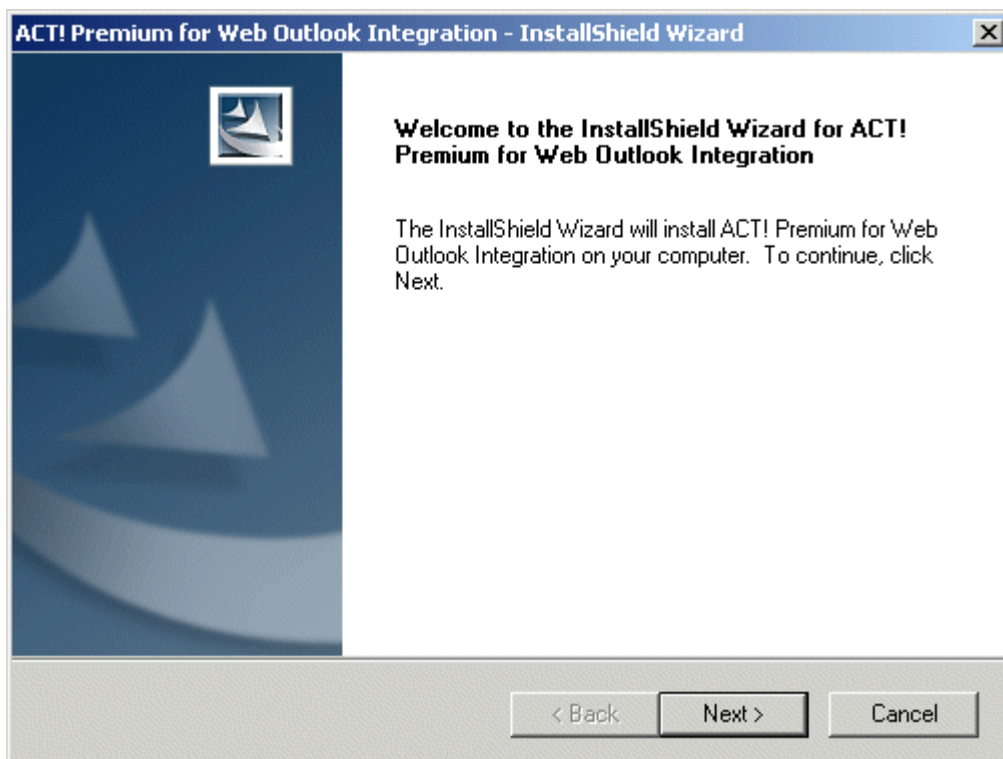
- Click **OK**. The following **Open File - Security Warning** dialog box appears.



- Click **Run**. the following **InstallShield Wizard - Preparing to Install** dialog box briefly appears.

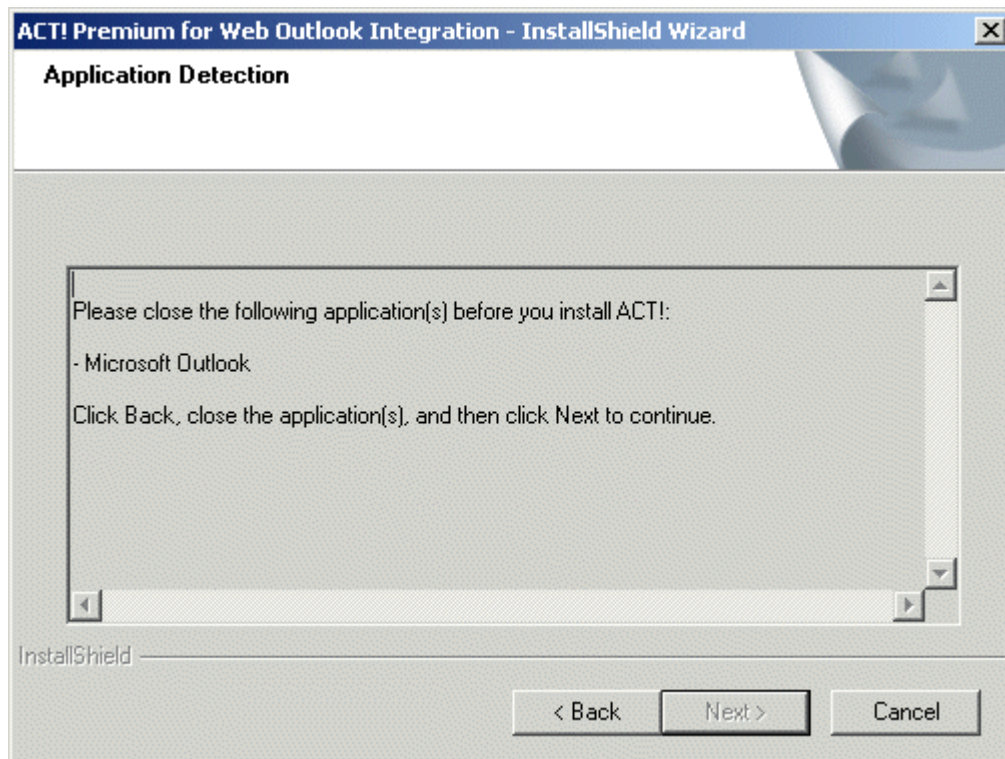


11. When the installation is prepared the following **ACT! Premium for Web Outlook Integration - InstallShield Wizard - Welcome** dialog box appears.

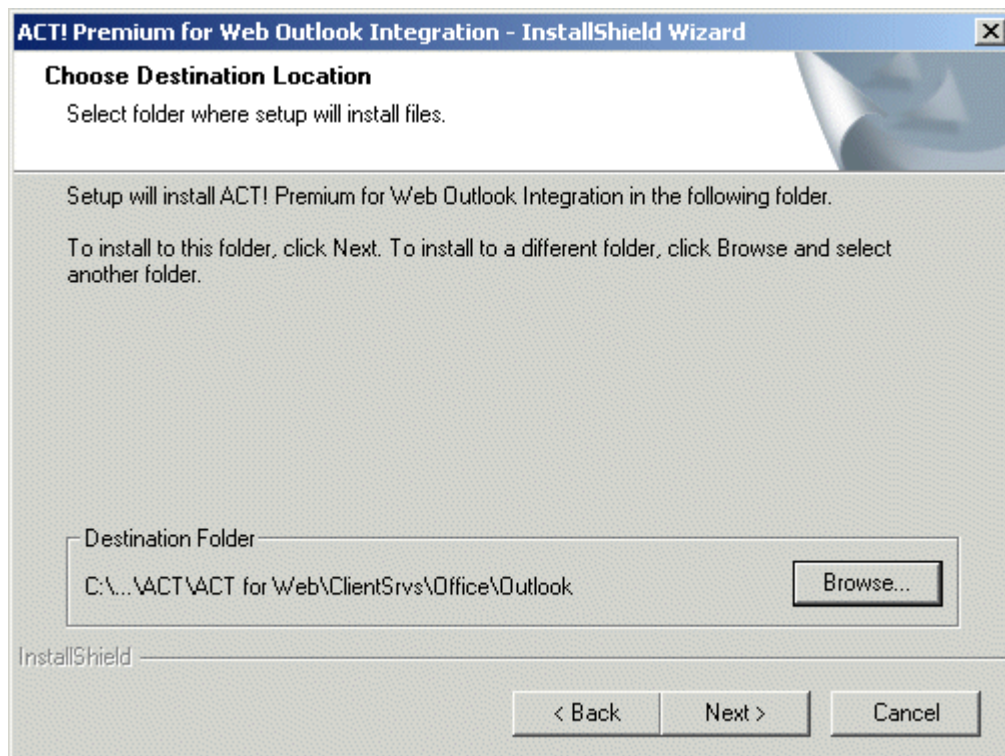


12. Click **Next**. If **Outlook** is open the following **ACT! Premium for Web Outlook Integration - InstallShield Wizard - Application Detection** dialog box appears. Click **Back** the **ACT! Premium for Web Outlook**

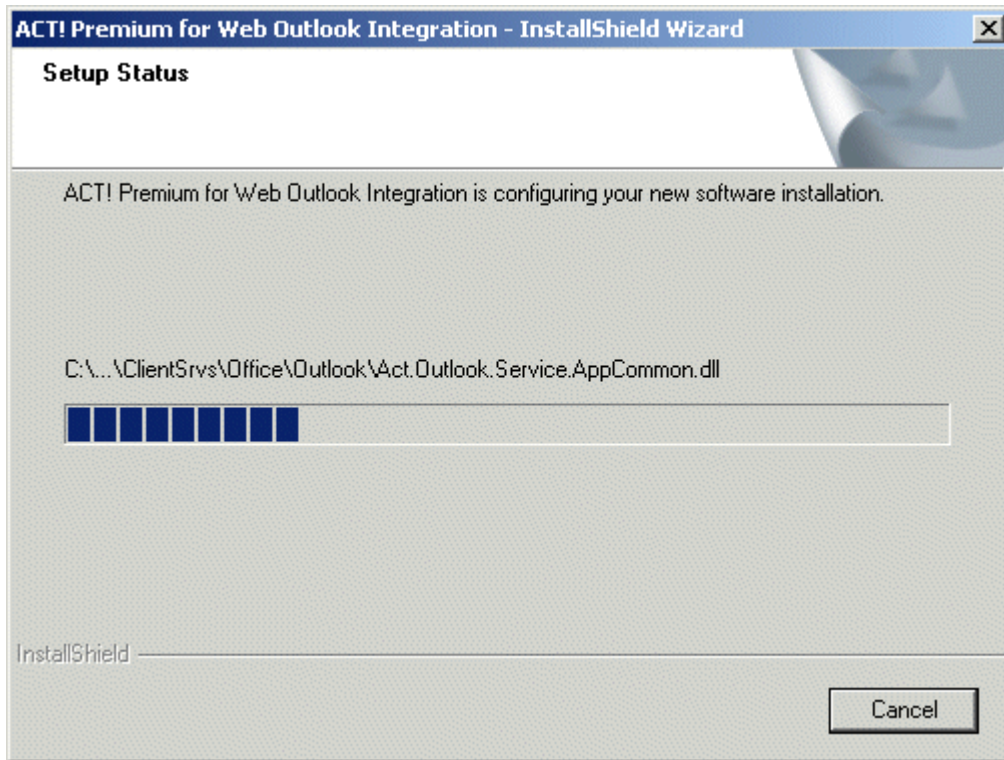
Integration - InstallShield Wizard - Welcome dialog box reappears. Close **Outlook** and then click **Next**, otherwise,



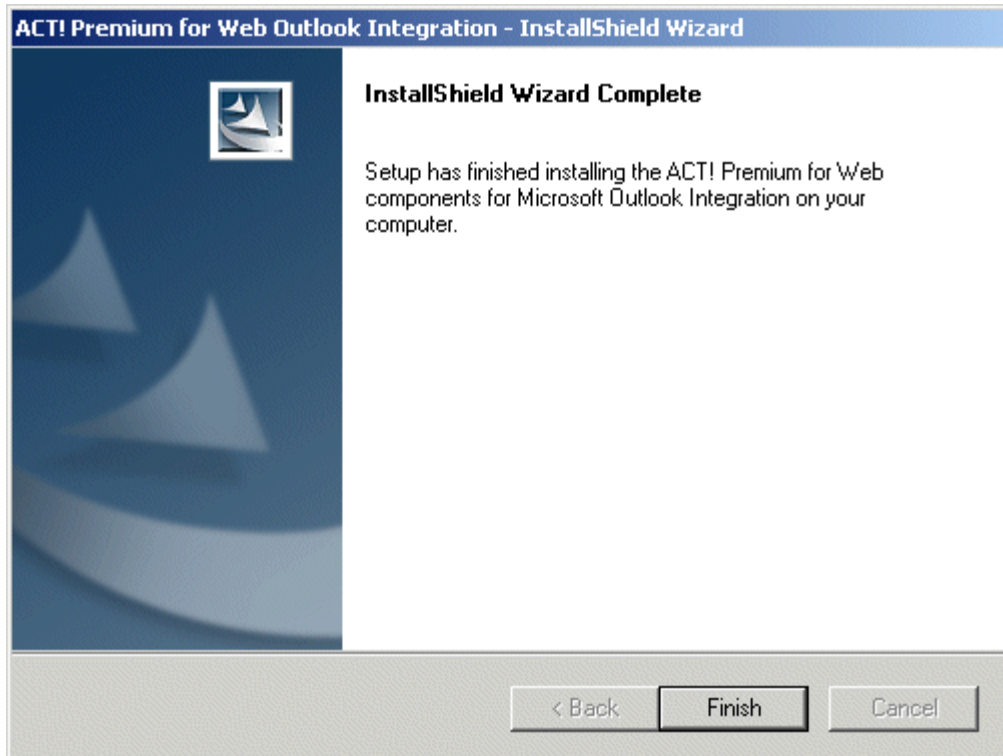
the following **ACT! Premium for Web Outlook Integration - InstallShield Wizard - Choose Destination Location** dialog box appears.



13. Click the **Browse** button to change this destination or click **Next** to use the default location (recommended). The **ACT! Premium for Web Outlook Integration - InstallShield Wizard - Setup Status** dialog box appears.



14. When the installation is finished the following **ACT! Premium for Web Outlook Integration - InstallShield Wizard - InstallShield Wizard Complete** dialog box appears.



15. Click **Finish** to complete the installation.

Adding Your ACT! Database(s) as Address Book(s) in Outlook:

▼ Outlook 2007 (ACT! 2008, 2009)

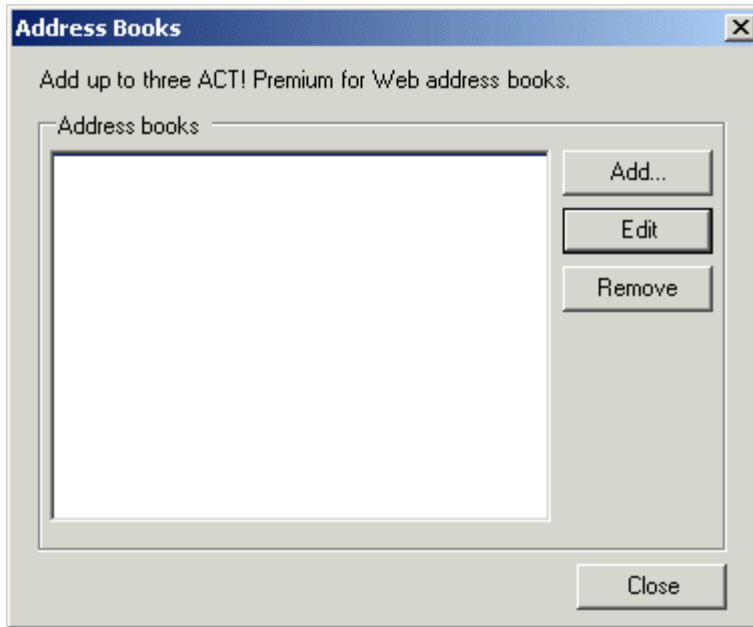
The following steps are automatically completed during the initial installation of the **outlooksetup.exe** file. Use these steps if need to re-add an ACT! Premium for **Web** database.

1. Launch **Outlook**.
2. Click the **Tools** menu, and then click **Account Settings**. The **Account Settings** dialog box appears.
3. Click the **Address Books** tab and then click **New**.
4. Enable the Additional Address Books option, and then click Next. The E-mail Accounts - Other Address Book Types dialog box appears.
5. Select the ACT! Premium for **Web** Address Book option, and then click Next. The Address Books dialog box appears.
6. Click the **Add** button. The **Add Address Books** dialog box appears.
7. Ensure that the correct **Web** address to your database is in the **Web Service address** field, click your database from the **ACT! Premium for Web Database** drop-down, and then type your **User name** and **Password** (if necessary) in the appropriate fields.

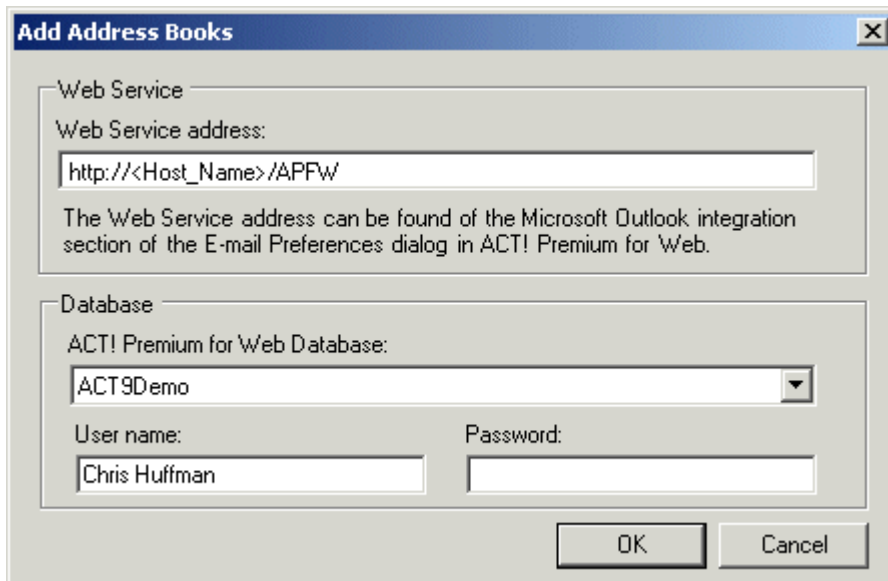
Note: If you are unsure what this address is login to your database; click the **Tools** menu, click the **Preferences** option, click the **E-mail** option, and then click the **Click here to view the Web Service Address used for setting up address books in Microsoft Outlook** option. The following **ACT! -- Web Page Dialog** dialog box appears with the **Web Service Address** for your database.

8. Click **OK**. The **Address Books** dialog box reappears with you database listed.
9. Click **Close**.
10. Click **OK**.
11. Click **OK**. Close and then re-launch **Outlook**. Open a new message, and then click the **To** button. The

- Select Names** dialog box appears.
12. Click the **Show Names for the** drop-down and locate **ACT! Web - (your_database_name)** to ensure that you have integrated your ACT! Premium for **Web** with **Outlook**.
 1. Launch **Outlook**.
 2. Click the **Tools** menu, then click **Services**. The **Services** dialog box appears.
 3. Under the **Services** tab, click **Add**. A list of available services appears.
 4. Click **ACT! Premium for Web Address Book**, then click **OK**. The **Address Books** dialog box appears.



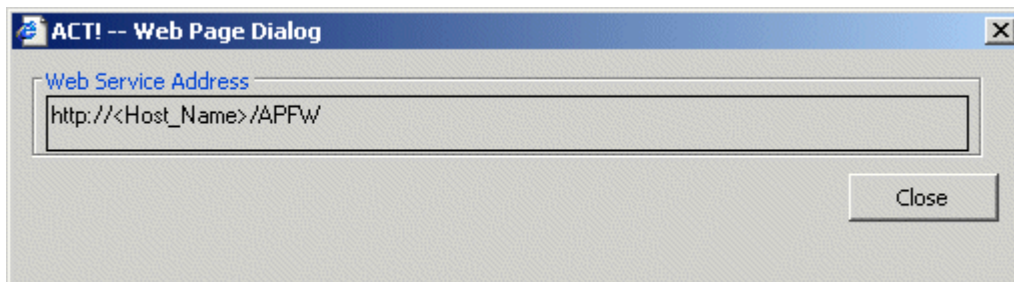
5. Click the **Add** button. The **Add Address Books** dialog box appears.



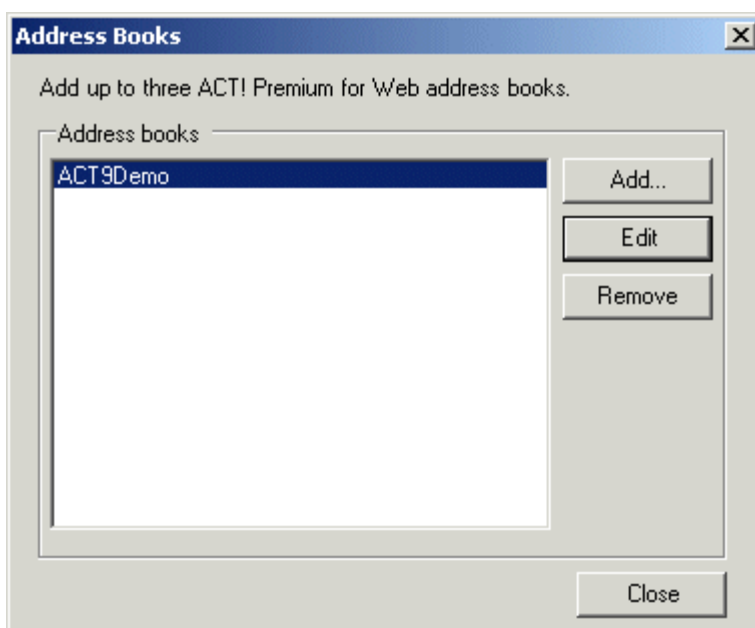
6. Ensure that the correct **Web** address to your database is in the **Web Service address** field, click your database from the **ACT! Premium for Web Database** drop-down, and then type your **User name** and **Password** (if necessary) in the appropriate fields.

Note: If you are unsure what this address is login to your database; click the **Tools** menu, click the

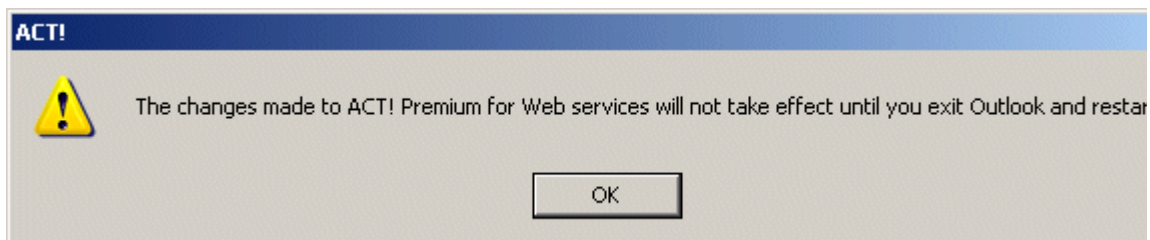
Preferences option, click the **E-mail** option, and then click the **Click here to view the Web Service Address used for setting up address books in Microsoft Outlook** option. The following **ACT! -- Web Page Dialog** dialog box appears with the **Web Service Address** for your database.



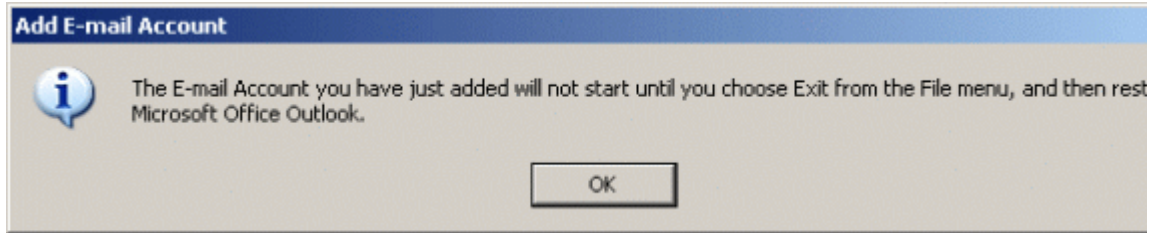
Click **Next**. The **Address Books** dialog box reappears with your database listed.



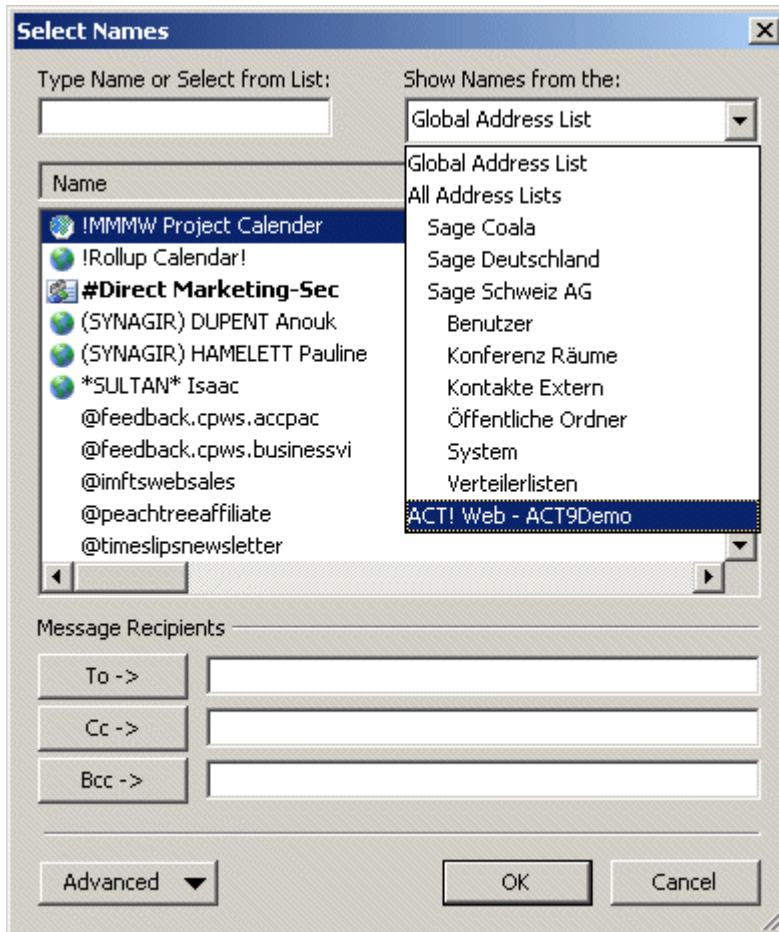
7. Click **Close**. The following **ACT!** warning message box appears.



8. Click **Ok**. the following **Add E-mail Account** message box appears.



9. Click **OK**. Close and then re-launch **Outlook**. Open a new message, and then click the **To** button. The **Select Names** dialog box appears.



10. Click the **Show Names for the** drop-down and locate **ACT! Web - (your_database_name)** to ensure that you have integrated your ACT! Premium for **Web** with **Outlook**.

Setting the Default E-mail History Option:

Note: ACT! Premium for **Web Outlook** integration will only create history to the default database. If you have added more than one ACT! database to the **Outlook** address book, you must ensure the default is set as desired.

ACT! Premium for Web

Record history to contacts in the following database:
http://<Host_Name> : ACT9Demo

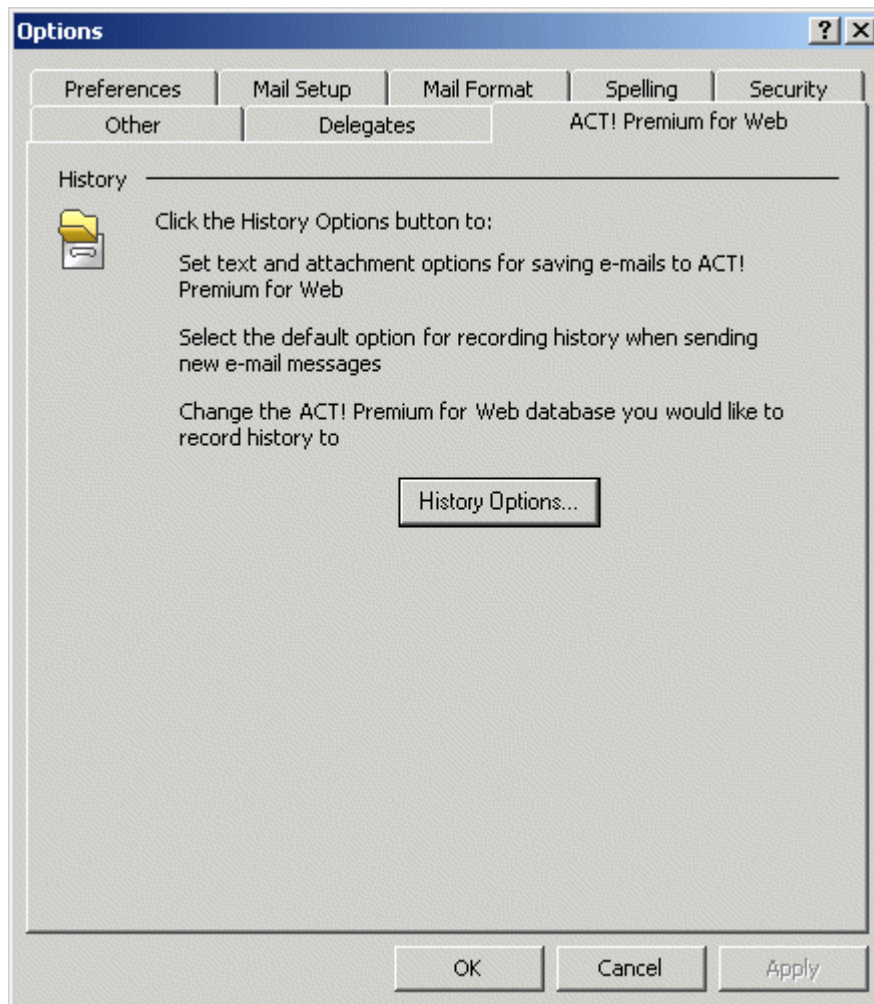
When sending e-mail, set my default history option to:
Record history

History format options

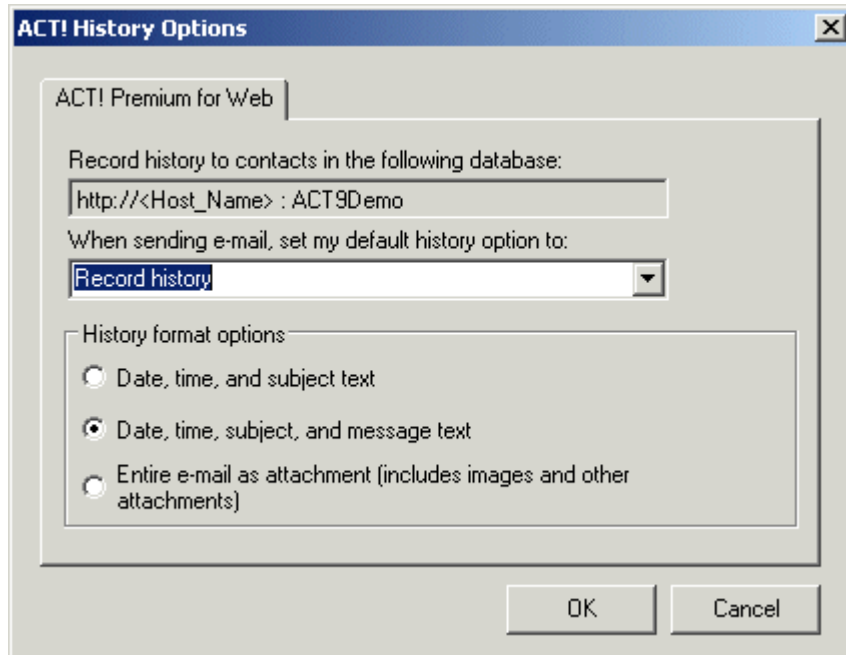
- Date, time, and subject text
- Date, time, subject, and message text
- Entire e-mail as attachment (includes images and other attachments)

This is done in the **History Options** section of the **ACT! Premium for Web** tab in the **Outlook Options**. The default database is displayed in the **Record history to contact in the following database** field. Simply changing this field allows history to be created in that database, as long as the e-mail address is associated with a contact in that database.

1. Launch **Outlook**.
2. Click the **Tools** menu, and then click **Options**. The **Options** dialog box appears.

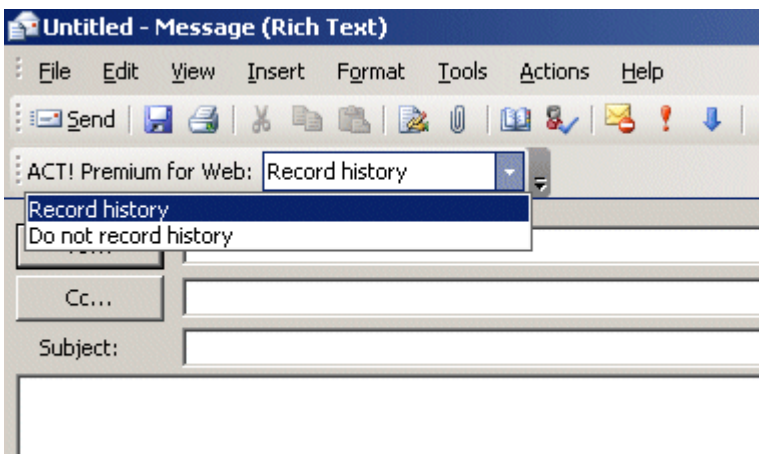


3. Under the **ACT! Premium for Web** tab click the **History Options** button. The **ACT! History Options** dialog box appears.

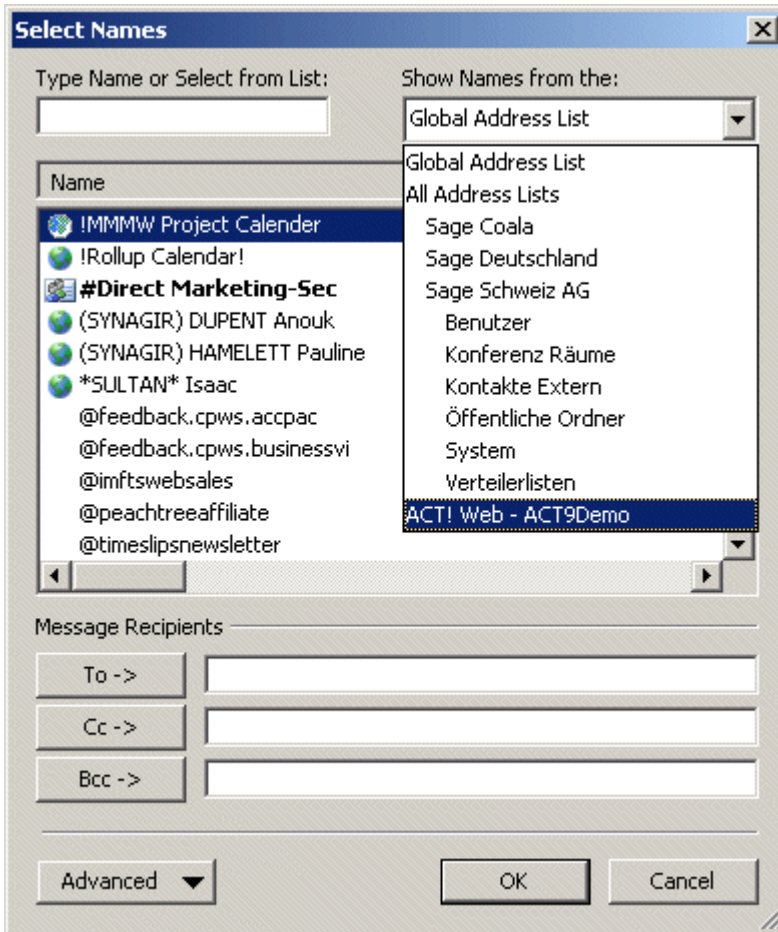


4. Ensure the correct **Web** address and database are listed in the **Record history to contacts in the following database** field, set the **When sending e-mail, set my default history option to**, and **History format options** as desired, and then click **OK**. The **Options** dialog box reappears.
5. Click **Apply**, and then **OK** to return to **Outlook**.

Creating a New Message:



When creating a new e-mail message from **Outlook** you can either set the **ACT! Premium for Web** option to **Record history** or **Do not record history**. If you would like to change the type of history is created you must go to the **ACT! History Options** before creating a message.



To select a contact from your ACT! Premium for **Web** database you can either type their name in the **To** field to allow **Outlook** to resolve it or click the **To** button change the **Show Names from the** drop-down box to the correct ACT! database, select the name from the **Name** box, and then click **OK**.