

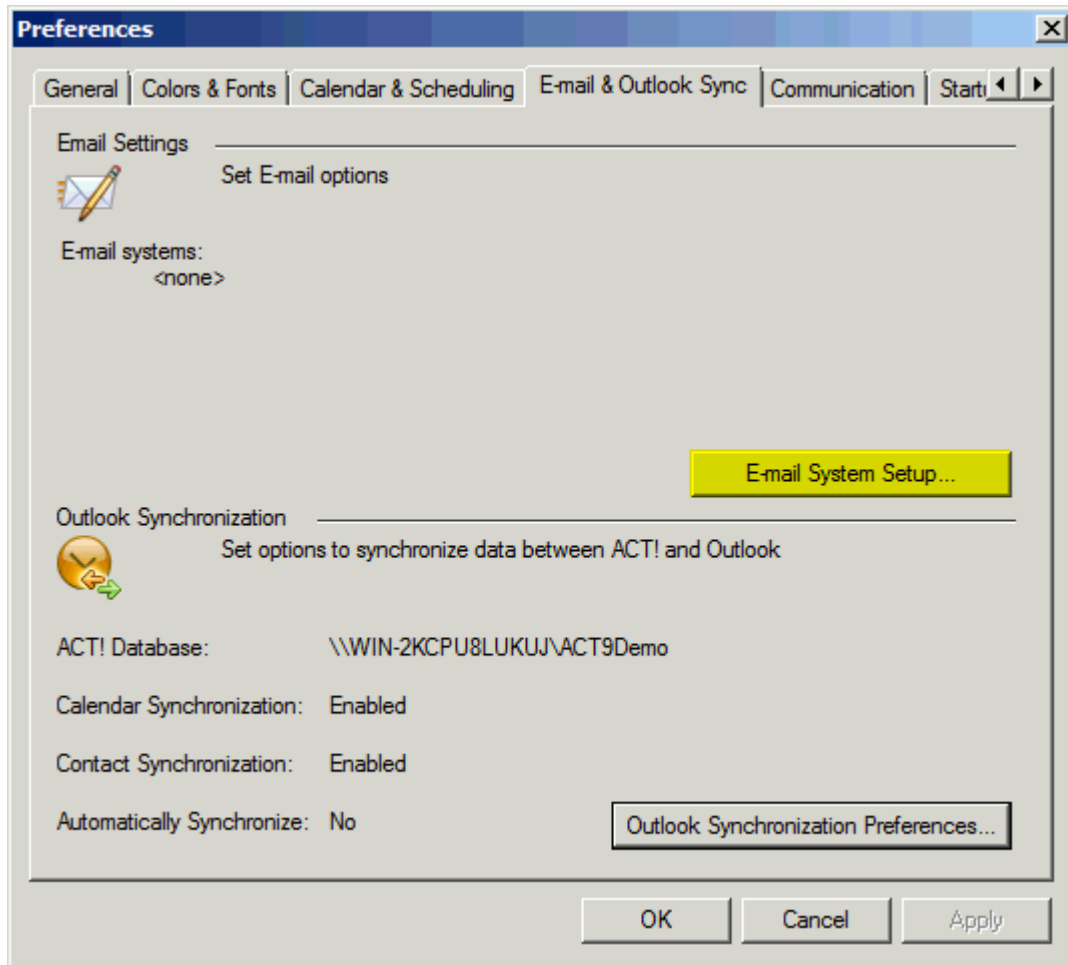
Sage ACT! Training Tip: How To Configure Microsoft Outlook as your E-mail Client

ACT! 2011 E-Mail will work through Microsoft Outlook versions 2002 (XP), 2003, 2007, or 2010.

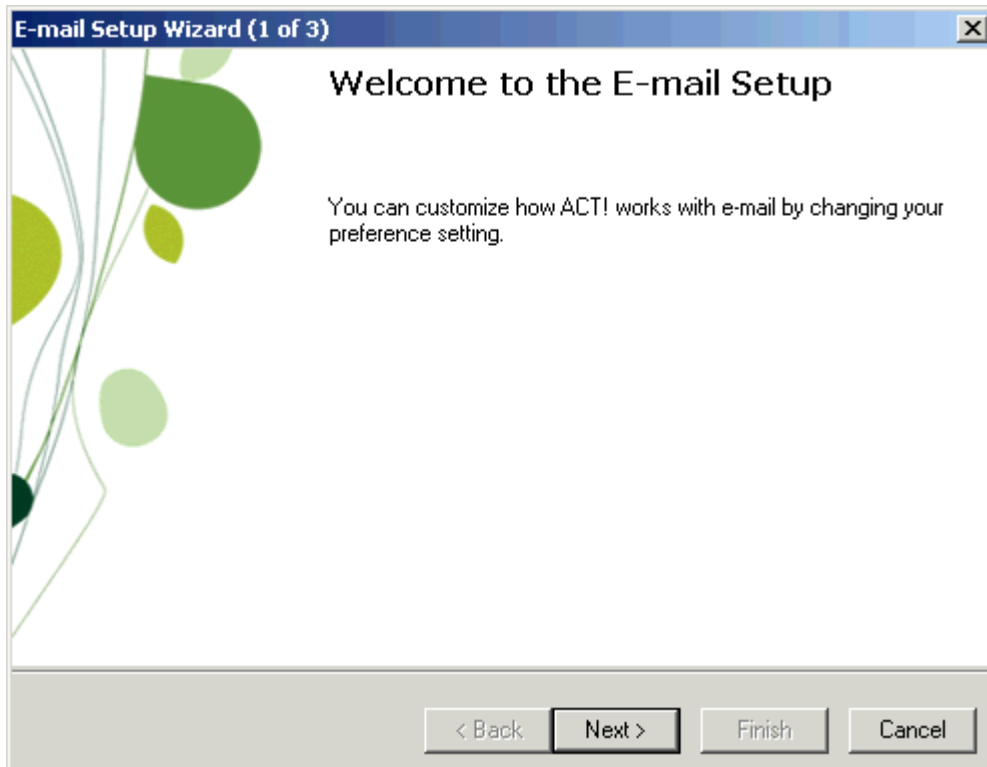
Important: In order for ACT! and Outlook to properly integrate, ACT! must have been installed **after** Outlook was installed. If you installed or upgraded Outlook after you installed ACT!, you will need to uninstall and reinstall ACT! prior to setting up Outlook as your email client for ACT!

To configure Microsoft Outlook as your e-mail client in ACT!, please use the following steps:

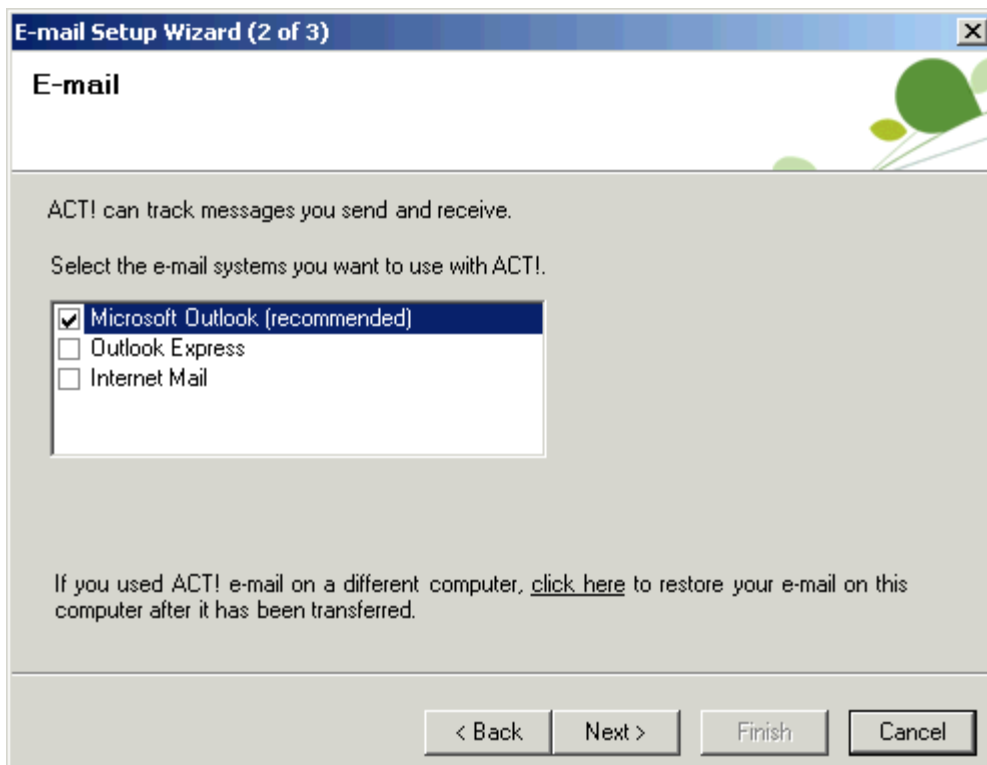
1. Click the **Tools** menu, and then click **Preferences**. The **Preferences** dialog box appears.
2. Select the **E-mail & Outlook Sync** tab and click the **E-mail System Setup** button.



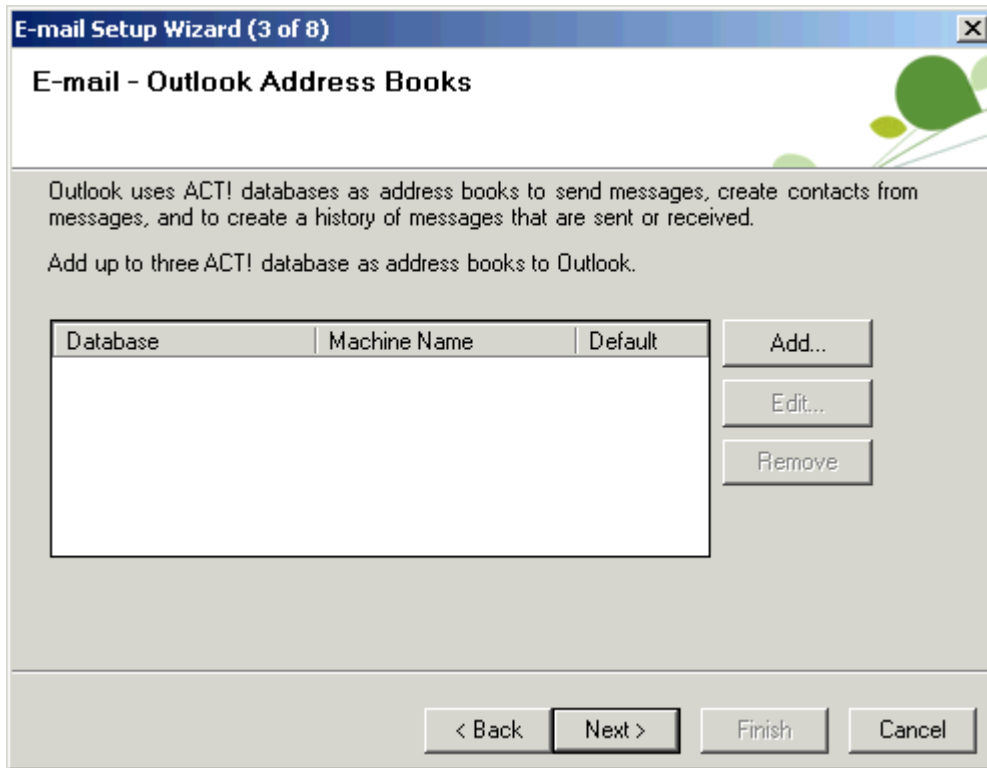
3. The following **E-mail Setup Wizard** appears. Click **Next** at the **Welcome to the E-mail setup Wizard** dialog box (if necessary).



4. The following **E-mail** dialog box appears:

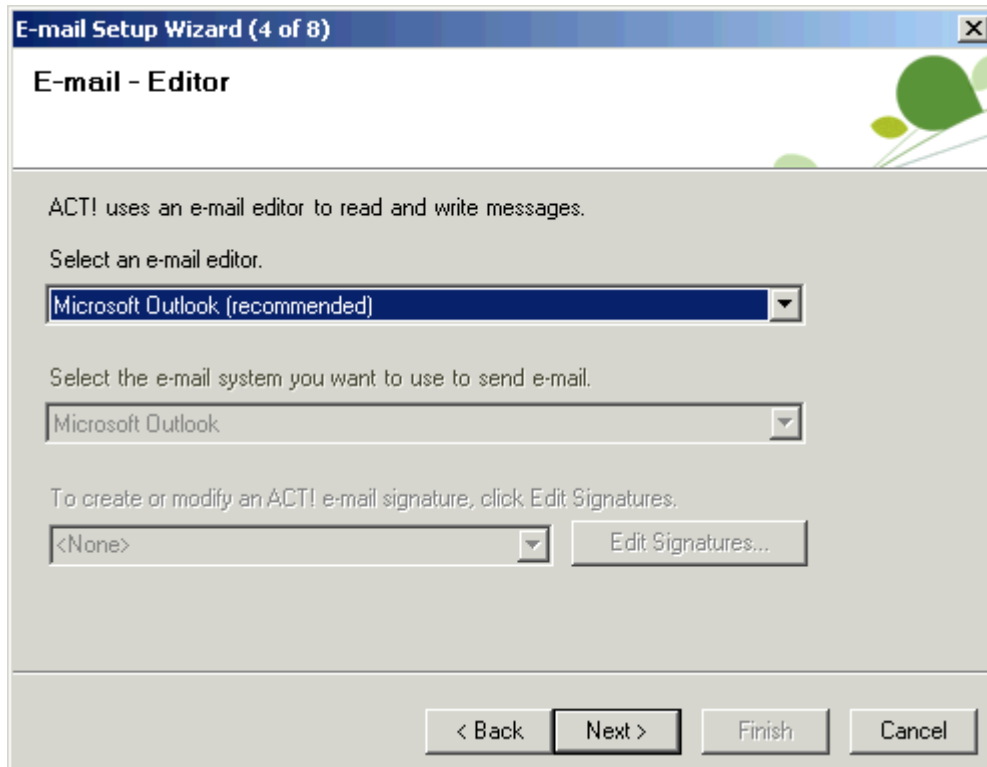


5. Click to enable the **Microsoft Outlook** e-mail system check box, and then click **Next**. The following **E-mail - Outlook Address Books** dialog box appears:




This page of the wizard allows you to add up to three ACT! databases as address books to Outlook.


6. After clicking next, the **E-mail Editor** dialog box appears:



7. For the **Select an e-mail editor** option, two options are available to choose from: **ACT! Email Editor** or **Microsoft Outlook** (recommended).

- **Select an e-mail editor:**

- **The ACT! Email Editor:** When you click on the **E-mail** option  from the side toolbar the ACT! E-mail program will launch with your Outlook folders displayed. If you click either the **Write** menu, and then click **E-mail message**, or click the contacts e-mail address hyperlink from the **E-mail** field, the ACT! E-mail program will launch with your Outlook folders displayed (if not already open) and the default ACT! e-mail template will appear properly addressed.

- **Microsoft Outlook:** When you click on the **E-mail** option  from the side toolbar, click the **Write** menu, and then click **E-mail message**, or click the contacts e-mail address hyperlink from the **E-mail** field the default Outlook e-mail template appears properly addressed. You must open Outlook to view your folder when using this option.

Note: If you choose the **Microsoft Outlook** option, you must setup an ACT! address book to enable history and attachments controls. You must also disable Microsoft Office Word as the editor for Outlook e-mail messages. For help on how to do this, please use the following steps:

- a. In Outlook, click the **Tools** menu, and then click **Options**. The **Options** dialog box appears.
- b. Under the **Mail Format** tab, clear the **Use Microsoft Office Word <version> to edit e-mail messages** check box.
- c. Click **Apply** and **OK**.

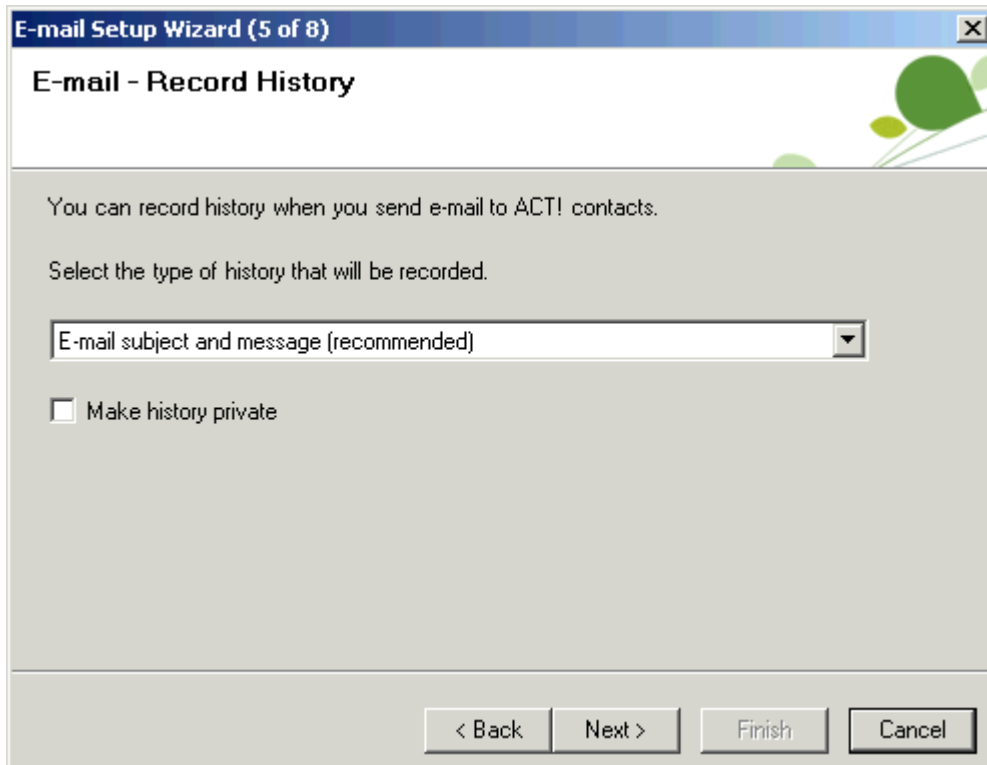
Note: If you choose the **Microsoft Outlook** option you will not be allowed to add any other e-mail programs to the ACT! E-mail client such as Outlook Express or Lotus Notes®.

It is recommended that you select the **ACT! Email Editor** option if you would like to setup more than one E-mail client in ACT!.

- **Edit Signatures:** This option is available only when using the ACT! e-mail program option. You may select your default signature that will appear in a new message from the drop-down. For detailed information on how to create an e-mail signature in ACT!, please refer to the following Knowledgebase Answer:

Title: How to Create a E-mail Signature in ACT!
ACT Knowledge Base ID: [22073](#)

8. Click **Next** to advance the **E-mail Setup Wizard**. The **E-mail - Record History** dialog box appears:



E-mail Setup Wizard (5 of 8)

E-mail - Record History

You can record history when you send e-mail to ACT! contacts.

Select the type of history that will be recorded.

E-mail subject and message (recommended)

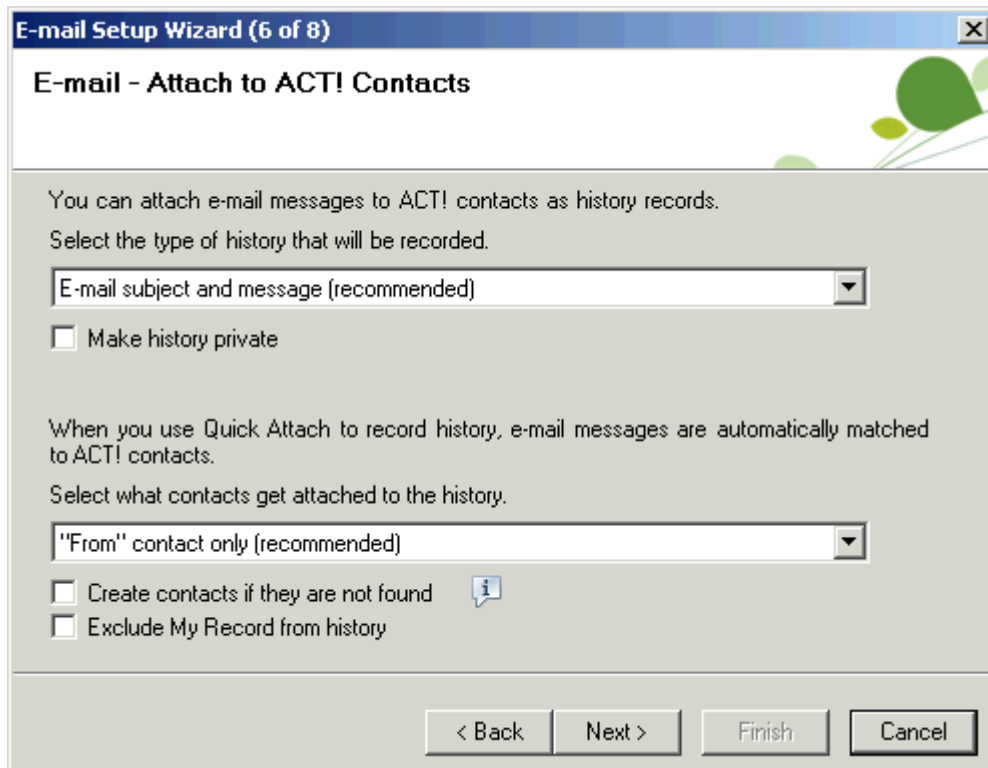
Make history private

< Back Next > Finish Cancel

On this screen, you are able to select the type of history recording option when you send e-mail to ACT! contacts. Selecting **Make History Private** will create private Histories when using the selected recording option. The **Record History** options available are:

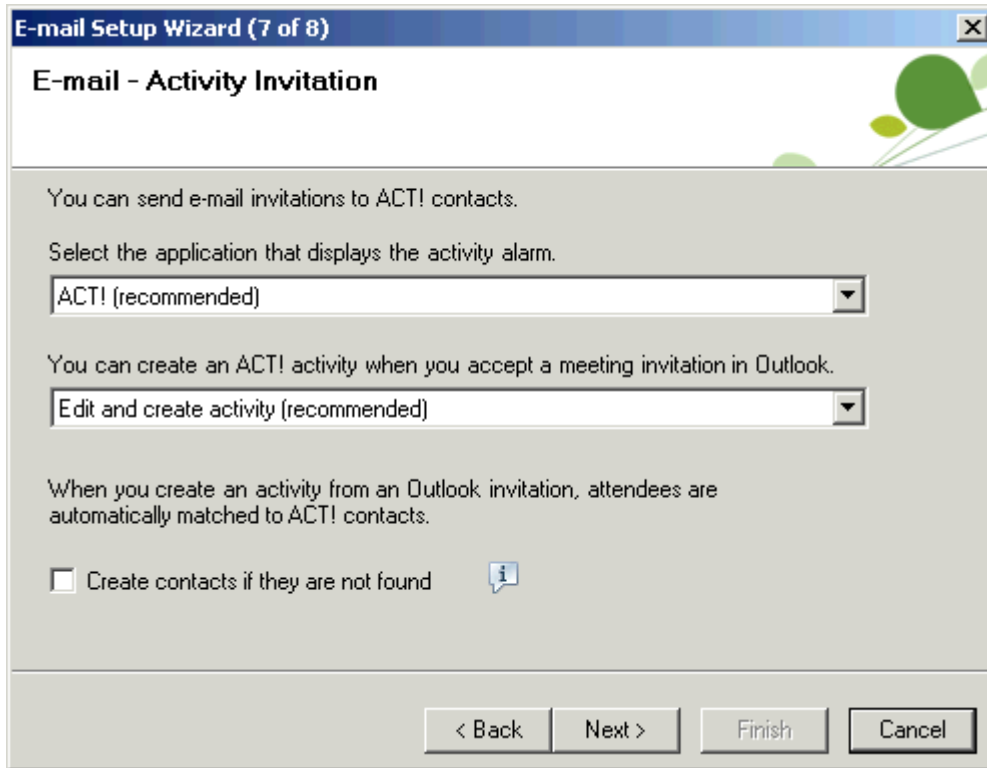
- **None**
- **E-mail Subject Only**
- **E-mail Subject and Message** (Recommended)
- **E-mail Subject, Message and all Attachments**

9. Click **Next** to advance to the next page in the wizard. The **Email - Attach to ACT! Contacts** dialog box appears:



From this page of the wizard, you are able to select how ACT! should attach messages as history records. The same options from the previous page in the wizard for history recording are available from list. In addition, you can choose the options for the **Quick Attach** function. Click **Next** and the **E-mail - Activity** page appears.

10. From the **Select the application that displays the activity alarm list**, select **ACT!**, **Outlook**, or **both applications** to be used with the iCalendar feature.

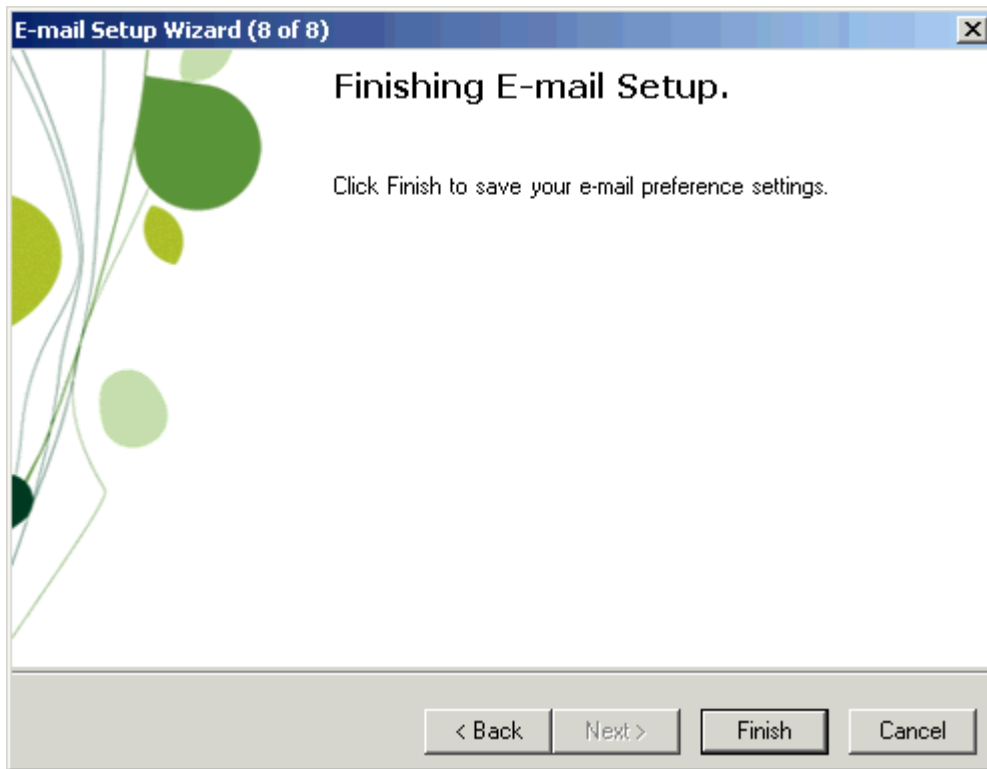


You can also select an option for creating an ACT! activity when accepting an Outlook meeting invitation:

- **Edit and create activity:** This is the default and this setting means you can edit the activity in either calendar
- **Automatically create activity:** This setting means you will not receive a confirmation of the activity being scheduled on your ACT! calendar.

To have ACT! create contacts when it cannot match addresses, select **Create contacts if they are not found**.

11. Click **Next** to proceed and the **Finishing E-mail Setup** dialog box appears:



12. Select **Finish** to close the **Finishing E-mail Setup** dialog box.