

# Act4Mail

Act4Mail integrates Outlook with Act! installed locally or hosted.

Act4Mail includes:

1. an integrated Outlook add-in that allows you to [accomplish actions to link Act! and Outlook](#)
2. an integrated Outlook add-in that allows you to [configure settings to govern Act4Mail](#)
3. a [standalone desktop application](#)

## 1. Using the Outlook Add-In to Accomplish Actions

From the Outlook Add-In, you can accomplish the following actions:

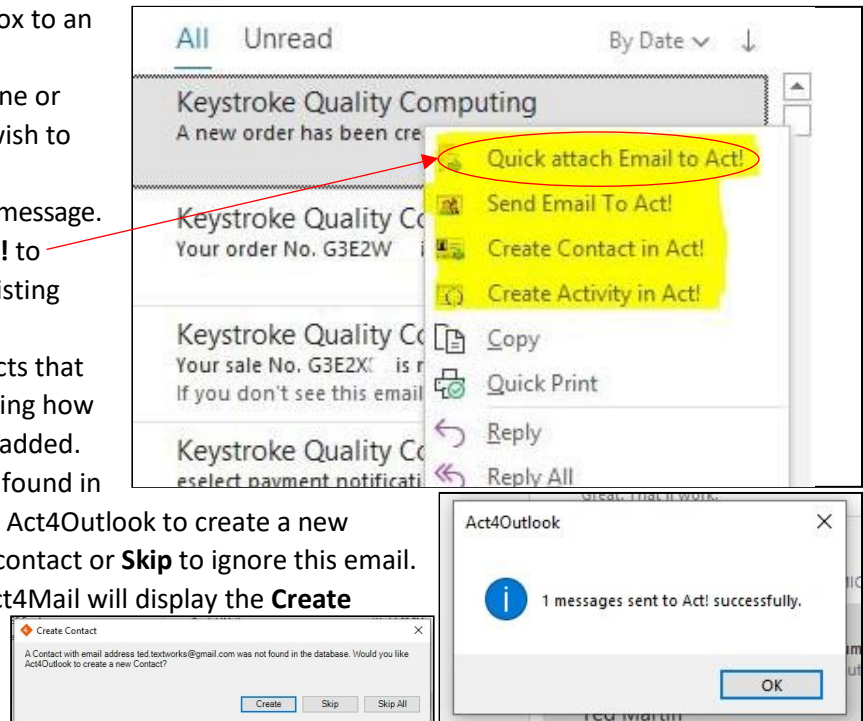
1. [Attach an email to an Act! contact.](#)
2. [Match email messages to Act! contacts](#) and attach them.
3. [Create an Act! contact](#) from email.
4. [Create an Act! activity](#) from email.
5. [Send a Calendar activity to Act!.](#)
6. [Create an Act! activity](#) from a task.
7. [Send an Outlook contact to Act!.](#)

### 1.1 Attach an Email to an Act! Contact

To attach an email from the Outlook inbox to an Act! contact:

1. In the Outlook inbox, highlight one or more email messages that you wish to attach to Act!.
2. Right-click on a highlighted email message.
3. Select **Quick attach Email to Act!** to attach the email messages to existing Act! accounts.

Act4Mail will add the email to the contacts that exist in Act! and display a pop-up indicating how many email messages were successfully added. If some of the email addresses were not found in Act!, Act4Mail will ask if you “Would like Act4Outlook to create a new Contact”; select **Create** to create a new contact or **Skip** to ignore this email. If you decide to create a new contact, Act4Mail will display the **Create Contact** information dialog.

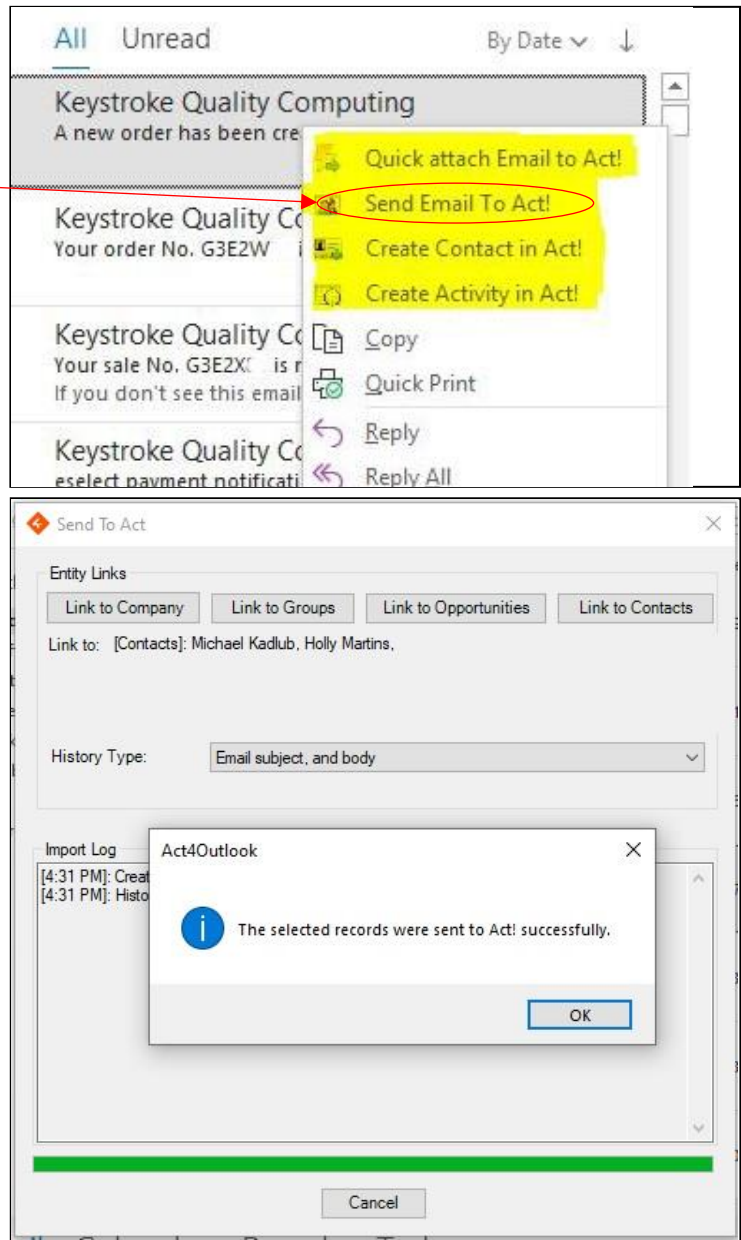


## 1.2 Match Email Messages to an Act! Contact

To match email messages to an Act! contact from the inbox:

1. Right-click on an email in the Outlook inbox from the desired sender.
2. Select **Send Email To Act!**.
3. Complete the **Send To Act** dialog, which will be linked with the current contact, if applicable. Select:  
**Link to Company** to choose which companies to link this email to.  
**Link to Groups** to choose which groups to link this email to.  
**Link to Opportunities** to choose which opportunities to link this email to.  
**Link to Contacts** to choose which contacts to link this email to.  
**History Type** to select what you want included in the history.
4. Select **Send** to send the email to Act!

Act4Mail will attach the email to all selected companies, groups, opportunities and contacts in Act!, then display a "The selected records were sent to Act! successfully" message.

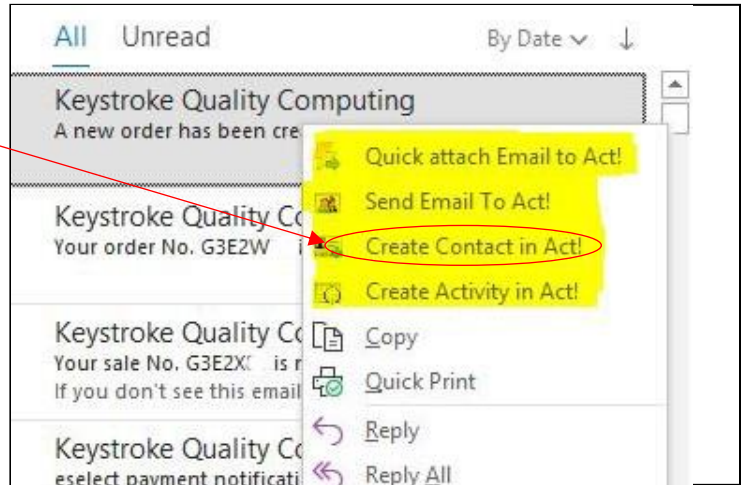


### 1.3 Create an Act! Contact from an Email

To create an Act! contact from the inbox:

1. Right-click on the email.
2. Select **Create Contact in Act!**.
3. Complete the **Create Contact** information dialog, which will be populated with the information [you have mapped](#), such as the contact's name and email address.
4. Click **Create**.

Act4Mail will create the Act! contact and display a "Contract was created successfully" message.



### 1.4 Create an Act! Activity from Email

To create an Act! activity from the inbox:

1. Right-click on an email.
2. Select **Create Activity in Act!** from the pop-up menu.
3. Complete the **Schedule Activity** dialog, which will be populated with the relevant information from the email.

Act4Mail will add the activity to your Act! calendar.

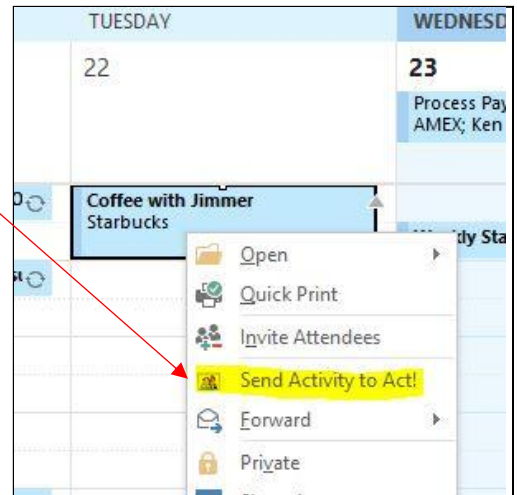


### 1.5 Send a Calendar Activity to Act!

To send an Outlook calendar activity to an Act!:

1. From Calendar, right-click on an activity.
2. Select **Send Activity to Act!** from the pop-up menu.
3. Complete the **Schedule Activity** dialog, which will be populated with the relevant information from the email.

Act4Mail will send the activity to your Act! calendar.

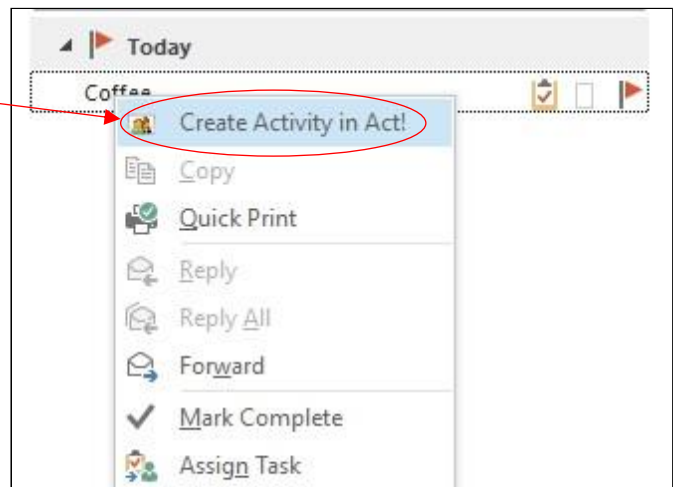


## 1.6 Create an Act! Activity from a Task

To create an Act! activity from an Outlook task:

1. From Tasks, right-click on a task.
2. Select **Create Activity in Act!** from the pop-up menu.
3. Complete the **Schedule Activity** dialog, which will be populated with the relevant information from the email.

Act4Mail will add the activity to your Act! calendar.

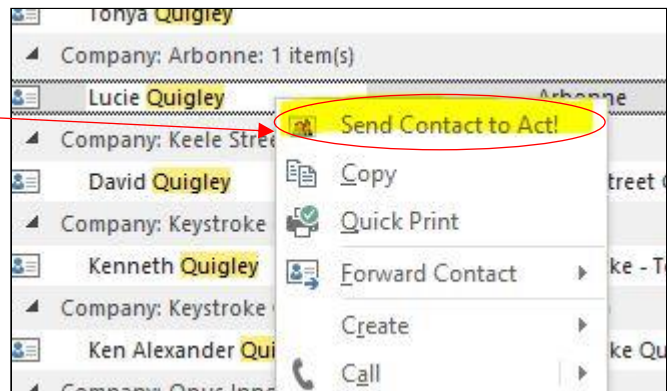


### 1.7 Send an Outlook Contact to Act!

To send an Outlook contact to Act!:

1. From People, right-click on a contact.
2. Select **Send Contact to Act!**.
3. Complete the **New Contact** information dialog, which will be populated with the contact's information that [you have mapped](#), such as name and email address.

Act4Mail will create the Act! contact.





## 2. Using the Outlook Add-In to Configure Settings

From the Outlook Add-In, you can configure the following:

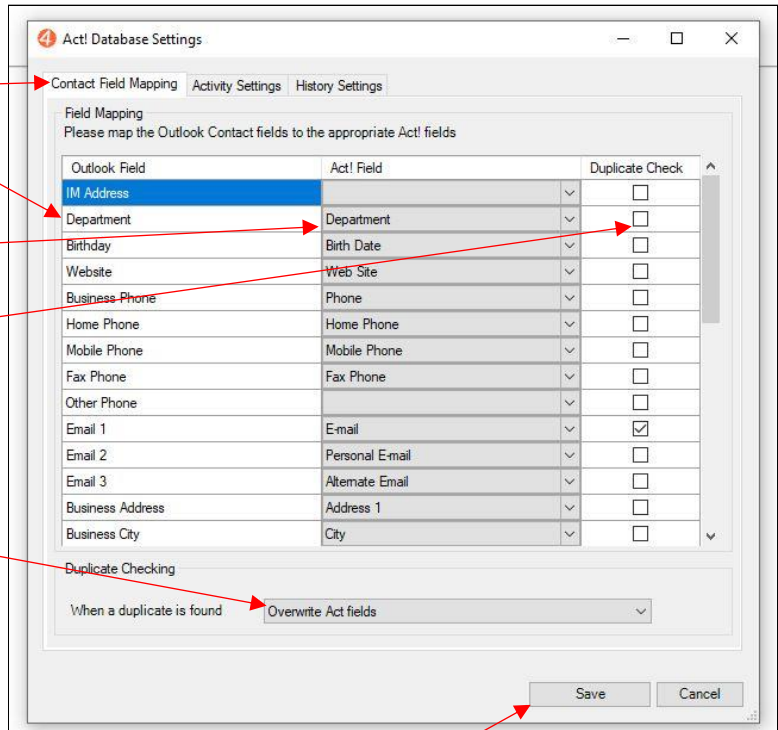
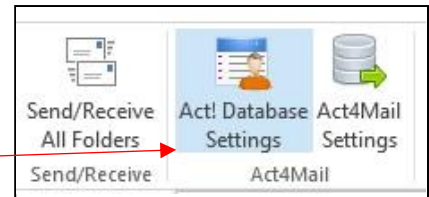
1. [Outlook contact field mapping to Act! fields.](#)
2. [Activity settings.](#)
3. [History type for incoming messages.](#)
4. [Act! database settings.](#)
5. [History recording settings.](#)
6. [Incoming messages settings.](#)
7. [Update settings.](#)

## 2.1 Map Outlook Contact Fields to Act! Fields

Act4Mail allows you to specify which fields you want to add to your Act! contact from an Outlook contact.

To map your Outlook contact fields to Act! fields:

1. Select **Act! Database Settings** from the Outlook Mail Home menu bar.
2. Select the **Contact Field Mapping** tab from the **Act Database Settings** dialog box.
3. From the **Outlook Field** list, find each Outlook field that you want mapped to an Act! field, then select the corresponding Act! field from the dropdown in the **Act! Field** list. Check the **Duplicate Check** checkbox if you want Act4Mail to look for duplicates.
4. In the Duplicate Checking dropdown, indicate what action you want Act4Mail to take when it encounters duplicate information:
  - **Do not overwrite** to keep the Act! contact information.
  - **Overwrite if Act field is blank** to only add information from Outlook if the Act field is blank.
  - **Overwrite Act fields** to update the Act field with information from Outlook.
5. Select **Save** to save your settings or **Cancel** to exit without saving.



## 2.2 Configure Activity Type

Act4Mail allows you to specify what type of Act! activity to create when you add an activity from Outlook calendar to Act!.

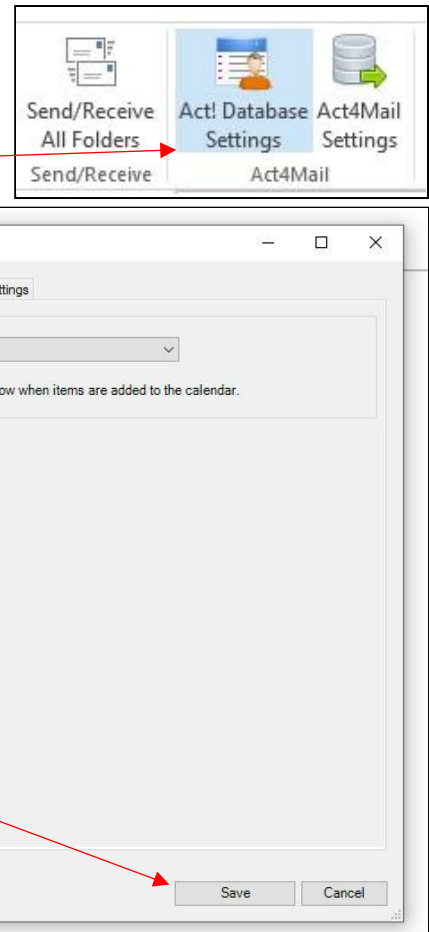
To specify your activity settings:

1. Select **Act! Database Settings** from the Outlook Mail Home menu bar.
2. Select the **Activity Settings** tab from the **Act Database Settings** dialog box.
3. Select the **Activity Type** from the dropdown list.

4. Mark the checkbox if you want Act4Mail to display the Create Activity window whenever items are added to your Outlook calendar.

**Note:** A change to this setting will only take effect after restarting Outlook.

5. Select **Save** to save your settings or **Cancel** to exit without saving.



## 2.3 Configure History Type

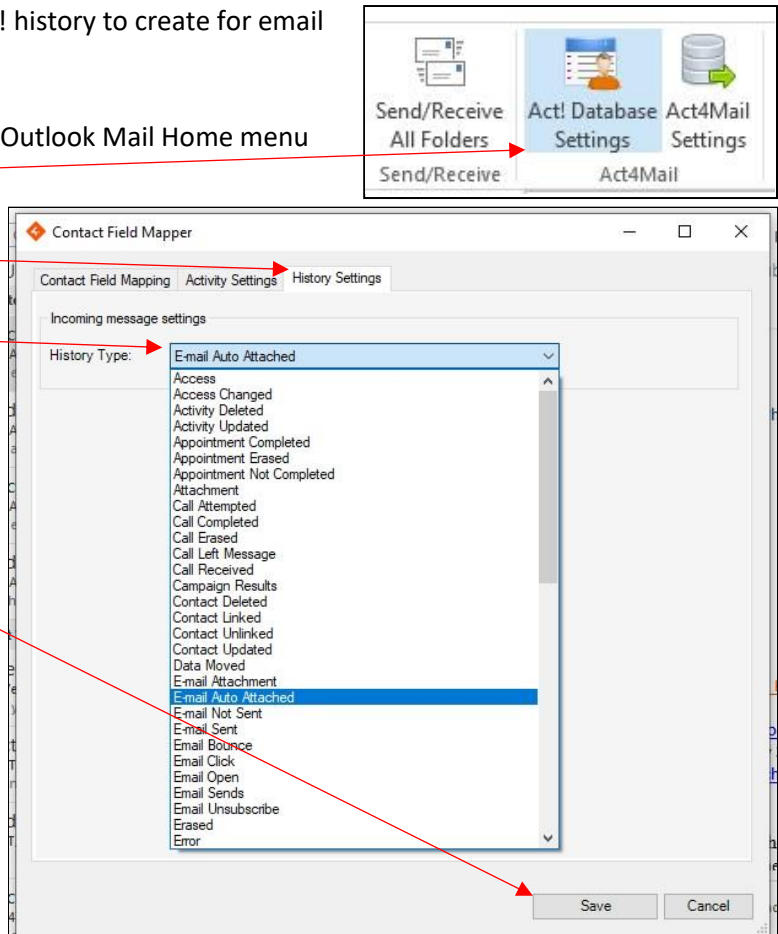
Act4Mail allows you to specify what type of Act! history to create for email messages received in Outlook.

To specify your history settings:

1. Select **Act! Database Settings** from the Outlook Mail Home menu bar.
2. Select the **History Settings** tab from the **Act Database Settings** dialog box.
3. Select the **History Type** from the dropdown list.

This will be reflected in the Result column of your Act! History List for all incoming email messages linked from Outlook to Act!.

4. Select **Save** to save your settings or **Cancel** to exit without saving.



## 2.4 Configure Act! Database Settings

To configure your connection to Act! Web API:

1. Select **Act4Mail Settings** from the Outlook Mail Home menu bar.
2. Select the **Act Database** tab from the **Act4Mail Settings** dialog box.
3. Enter the following information in the Act! Web API Connection pop-up:

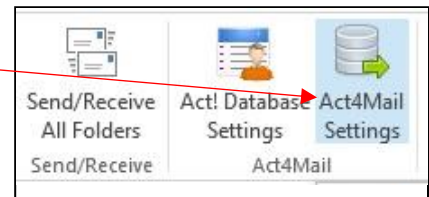
**Act! Web API URL** – Specify the web link to your Act! database API.  
For your URL, contact your DB Administrator or, if you are using Act! Connect Link, follow the steps in this article: [How to retrieve the Act! Web API URL when using Act! Connect Link](#)

**Act! Database Name** – Specify the name of your Act! database (for example, Act2018Demo).  
Contact your DB Administrator for DB name.

**Act! Username** – Enter your Act! username.

**Act! Password** – Enter the Act! password for the username.

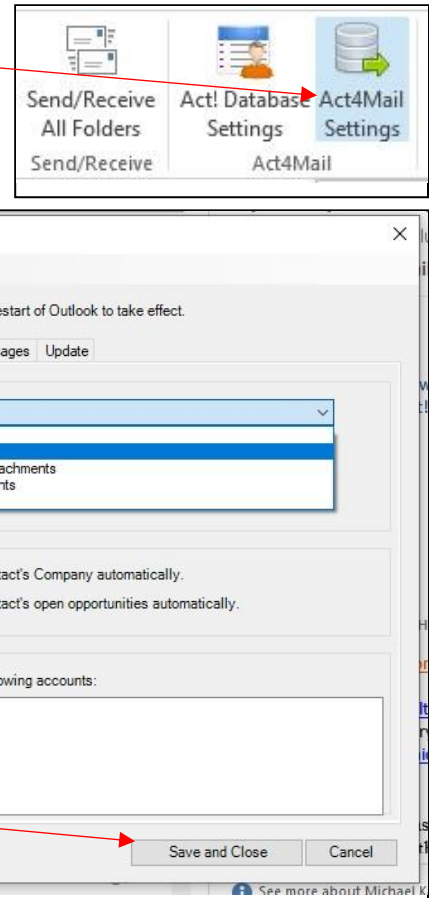
4. Click **Login** to validate that you have entered the settings correctly.  
The system will display a “Logged in to the database successfully” message.
5. When you have validated that your settings are correct, click **Save and Close** to save your settings.



## 2.5 Configure History Recording

To configure how Act4Mail records Outlook email messages in Act! history:

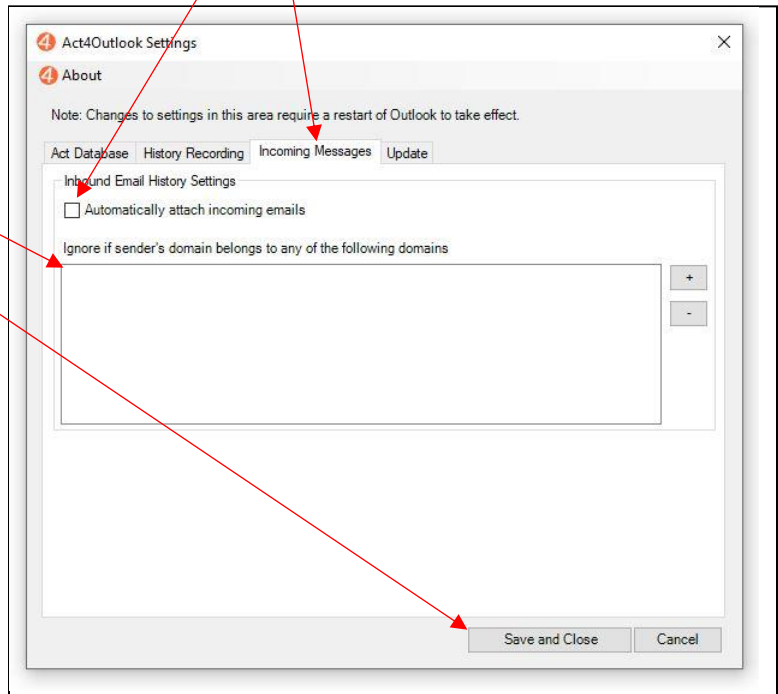
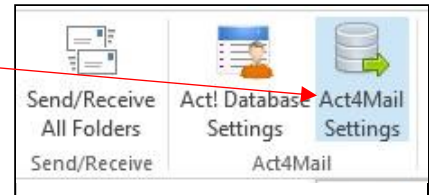
1. Select **Act4Mail Settings** from the Outlook Mail Home menu bar.
2. Select the **History Recording** tab from the **Act4Mail Settings** dialog box.
3. For **History Attachment Type**, select:
  - the type of information from Outlook email messages that you want attached to your Act! history
  - What actions you want taken with the Outlook email messages in Act!
4. For **History Linking**, select whether you want the recorded email messages to be associated with the contact's company and opportunities.
5. For **Secluded accounts**, select all of your Outlook email accounts that you want excluded from automatic history recording.
6. Click **Save and Close** to save your settings.



## 2.6 Configure Incoming Messages

To configure how Act4Mail handles incoming Outlook email messages:

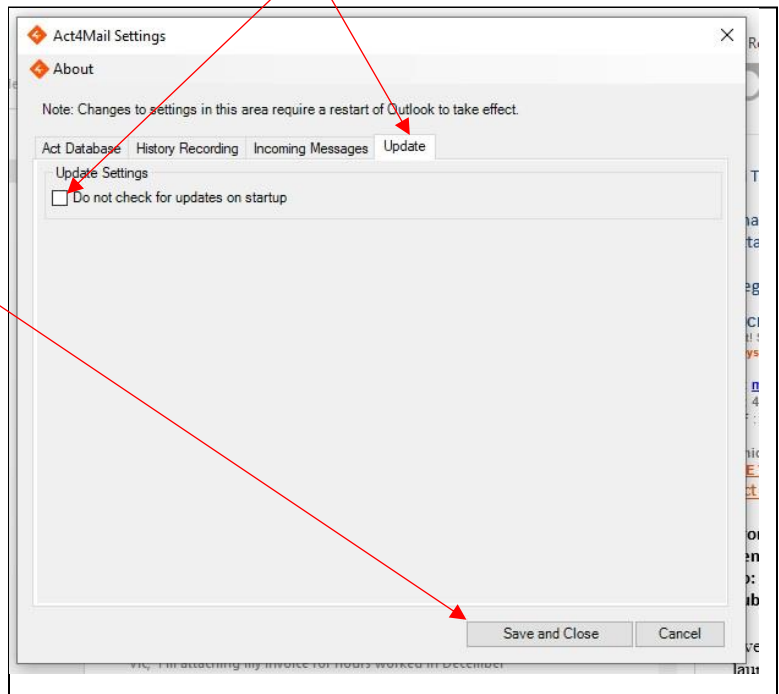
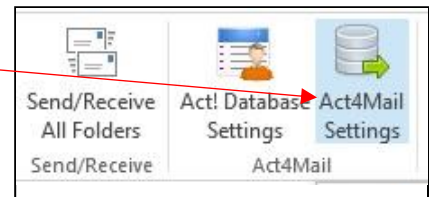
1. Select **Act4Mail Settings** from the Outlook Mail Home menu bar.
2. Select the **Incoming Messages** tab from the **Act4Mail Settings** dialog box.
3. Select whether to **Automatically attach incoming emails**.
4. List the domains from which to ignore incoming emails. Use the plus (+) and minus (-) buttons to add or remove domains from the list.
5. Click **Save and Close** to save your settings.



## 2.7 Configure Updates

To configure Act4Mail updates:

1. Select **Act4Mail Settings** from the Outlook Mail Home menu bar.
2. Select the **Update** tab from the **Act4Mail Settings** dialog box.
3. By default, every time it starts, Act4Mail checks to see if there are any updates. Select **Do not check for updates on startup**, if you do not want Act4Mail to check for updates automatically.
4. Click **Save and Close** to save your settings.





### 3. Using the Standalone Application

When you installed Act4Mail, it should have included an Act4Mail icon on your desktop. Simply click the icon to launch the Act4Mail standalone application.

From the Act4Mail standalone application, you can:

1. [Configure the Act! API settings.](#)
2. [Merge to Word.](#)
3. [Merge to Email.](#)
4. [Manage Templates.](#)
5. [Configure Act4Mail settings.](#)
6. [Manage your Act4Mail license.](#)

### 3.1 Configure the Act! API Settings

To configure your connection to Act! Web API:

1. Select **Act! API Settings** from the Act4Mail menu bar.
2. Enter the following information in the Act! Web API Connection pop-up:

**Act! Web API URL** – Specify the web link to your Act! database API.

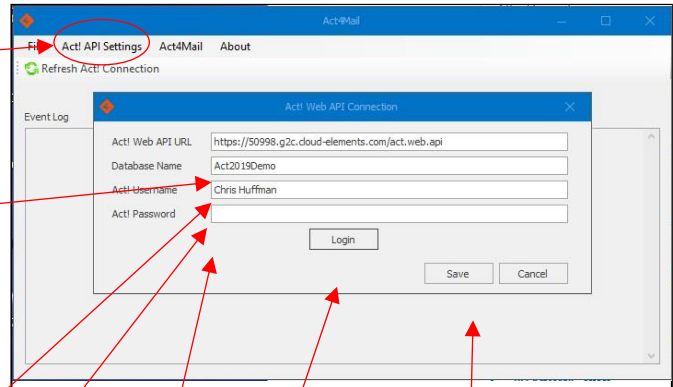
For your URL, contact your DB Administrator or, if you are using Act! Connect Link, follow the steps in this article: [How to retrieve the Act! Web API URL when using Act! Connect Link](#)

**Act! Database Name** – Specify the name of your Act! database (for example, Act2018Demo). Contact your DB Administrator for DB name.

**Act! Username** – Enter your Act! username.

**Act! Password** – Enter the Act! password for the username.

3. Click **Login** to validate that you have entered the settings correctly. The system will display a “Logged into the Act! Web API successfully” message.
4. When you have validated that your settings are correct, click **Save** to save your settings.



### 3.2 Merge to Word

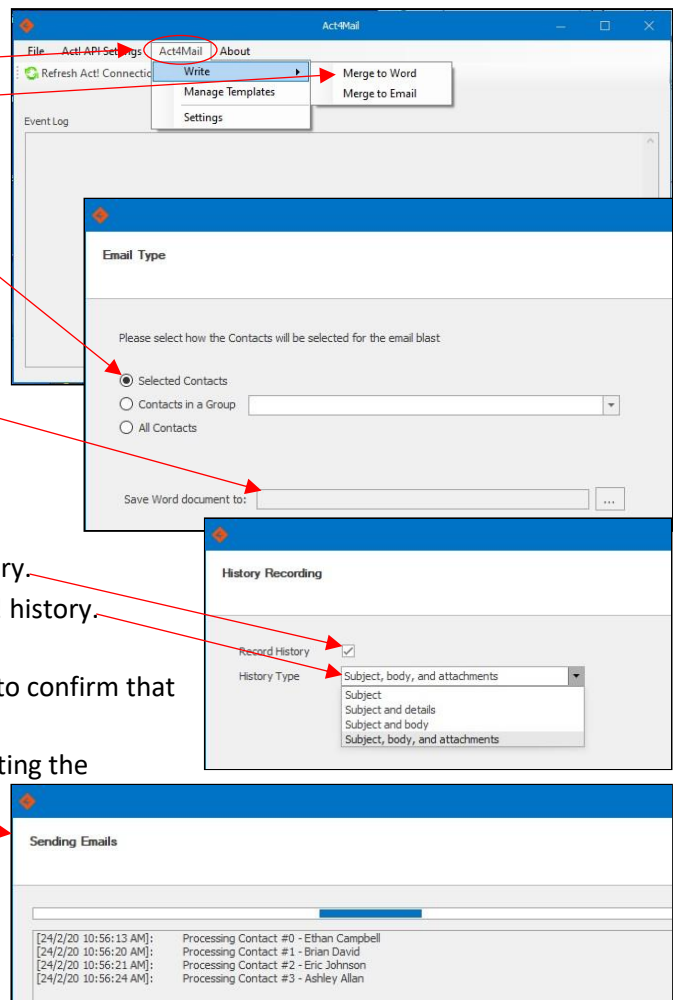
To create a mail merge and save to a Word document:

1. Select **Act4Mail** from the Act4Mail menu bar.
2. Select **Write**, then **Merge to Word**.
3. Select the template you wish to use, then click **Open**.
4. In the **Email Type** window:
  - Select the contacts to receive the message.
  - Select a Word document you want to save the merged mail to.
  - Click **Next** to continue.

If you choose Selected Contracts, you will be presented with **Contact Selection** window from which to choose the contacts.

5. In the **History Recording** window:
  - Select if you want to record this in Act! history.
  - Select the details you want to include in Act! history.
  - Click **Next** to continue.
6. If the **Confirmation** window appears, click **Next** to confirm that you want to send the email messages.

Act4Mail will display the **Sending Emails** window, listing the contacts as the email is sent to them.

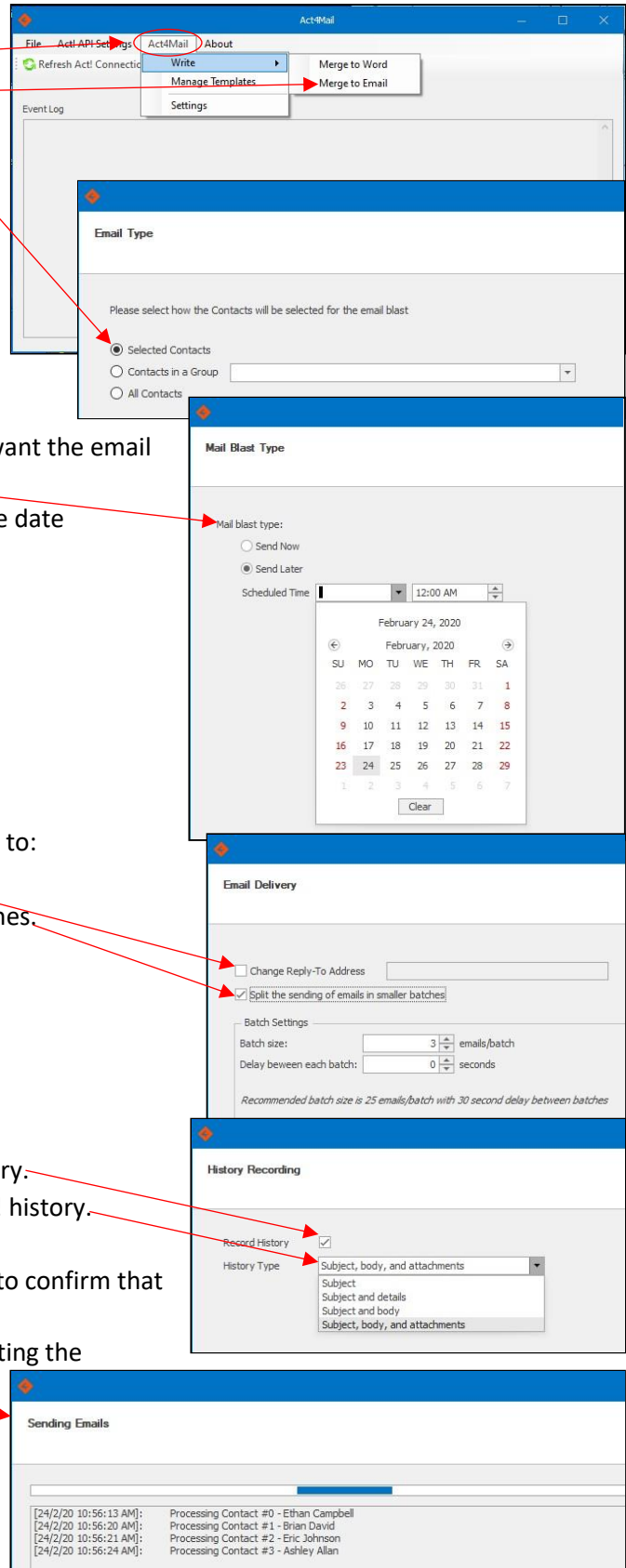


### 3.3 Merge to Email

To create a mail merge:

1. Select **Act4Mail** from the Act4Mail menu bar.
2. Select **Write**, then **Merge to Email**.
3. Select the template you wish to use, then click **Open**.
4. In the **Email Type** window, select the contacts to receive the message, then click **Next** to continue:  
If you choose Selected Contracts, you will be presented with **Contact Selection** window from which to choose the contacts.
5. In the **Email Blast** window, select whether you want the email messages to **Send Now** or **Send Later**.  
If you choose to Send Later, you must specify the date and time for them to be sent.
6. In the **Email Delivery** window, select if you want to:
  - Use a different return email address.
  - Split the sending of emails into smaller batches.
7. In the **History Recording** window:
  - Select if you want to record this in Act! history.
  - Select the details you want to include in Act! history.
  - Click **Next** to continue.
8. If the **Confirmation** window appears, click **Next** to confirm that you want to send the email messages.

Act4Mail will display the **Sending Emails** window, listing the contacts as the email is sent to them.



### 3.4 Manage Templates

Act! allows you to create and modify document templates that you can use for creating Word or Email merge messages.

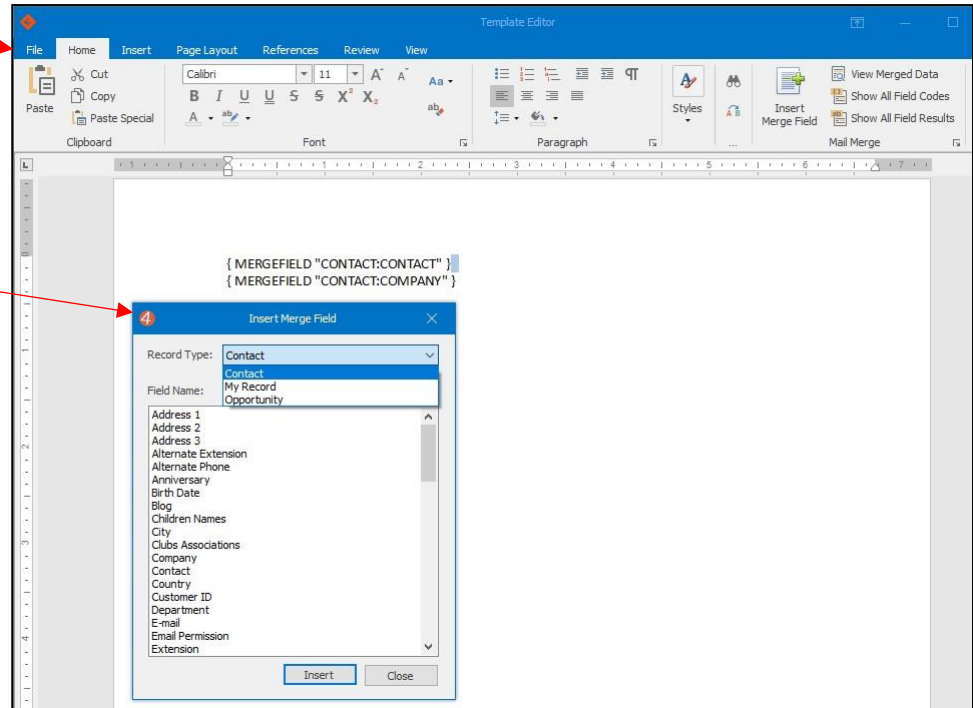
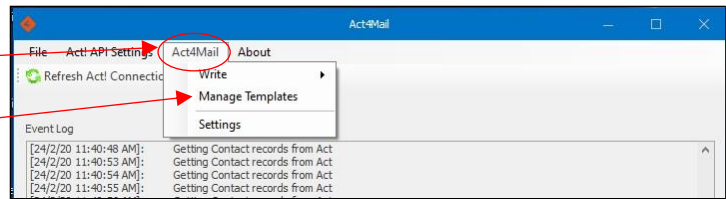
To manage your templates using Act4Mail:

1. Select **Act4Mail** from the Act4Mail menu bar.
2. Select **Manage Templates**.
3. Select the template you wish to use, then click **Open**.
4. Use the **Template Editor** to design the document template,

including inserting fields from Act! to merge into the document.

For assistance using the Template Editor, consult this knowledge base article:

[Creating/Editing Templates](#).



### 3.5 Configure Act4Mail

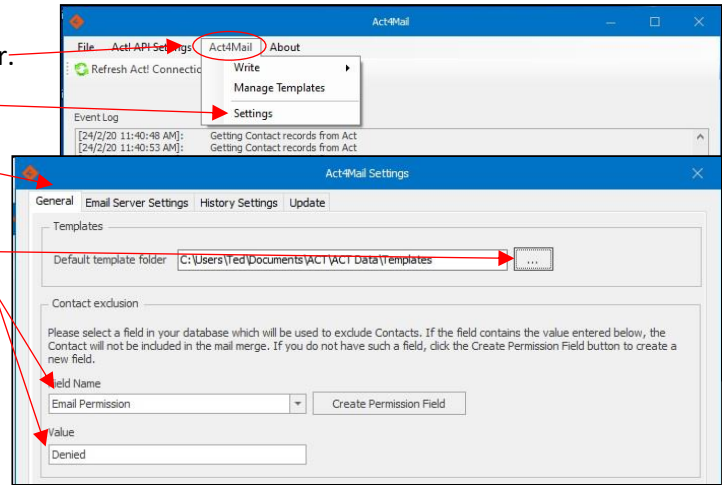
To manage your Act4Mail settings:

1. Select **Act4Mail** from the Act4Mail menu bar:

2. Select **Settings**.

3. Select the **General** tab, then:

- a) Use the file explorer (...) to select the default file folder for your document templates.
- b) Select an Act! **Field Name** and **Value** to use to exclude contacts from an email merge. Contacts that have the specified value in the specified field will be excluded from any mail merge.



4. Select the **Email Server Settings** tab, then:

- a) Choose the **Display Name** and **Email Address** from which to send the email messages.

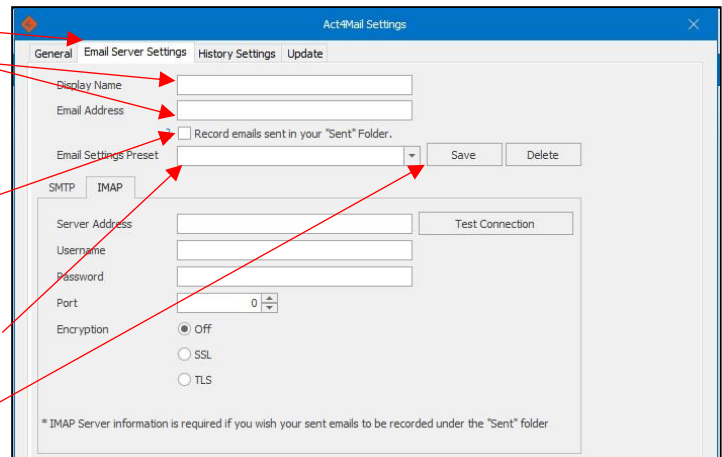
- b) Mark the checkbox to record the sent email messages in your Sent folder.

**Note:** You must configure IMAP settings for this function to work.

- c) Use the **Email Settings Preset** pulldown to use previously saved settings or click Save to save your current settings as a preset.

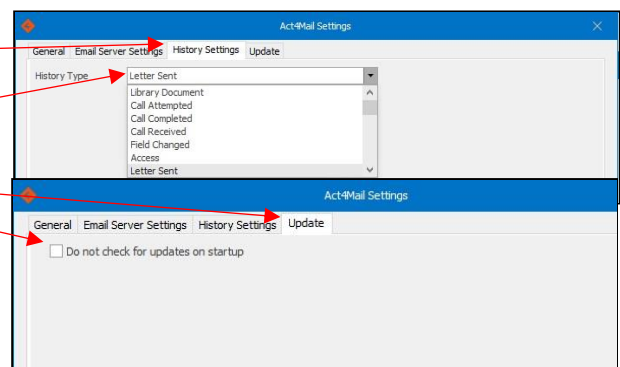
- d) Configure the SMTP settings for your email account to allow Act4Mail to send mail.

- e) Configure the IMTP settings for your email account to allow Act4Mail to save messages in the Sent folder of your email application.



5. Select the **History Settings** tab, then use the dropdown to choose the type of information to record in Act! history for the email messages.

6. Select the **Update** tab, then select **Do not check for updates on startup**, if you do not want Act4Mail to check for updates automatically every time it starts.



### 3.6 Manage Your Act4Mail License

To manage your Act4Mail license, select **About** from the Act4Mail menu bar. This displays your **License Key**, **Version**, **Subscription Expiry** and any **3<sup>rd</sup> Party Licenses**.

From the About window, you may select:

1. **Register** to register your license
2. **Delete License** to delete your license
3. **View Logs** to view any of the log files created by Act4Mail

