

Automatically attach Outlook Emails to ACT!

One of the least known benefits of ACT! is its ability to use Outlook Rules to automatically attach received emails to ACT! contacts.

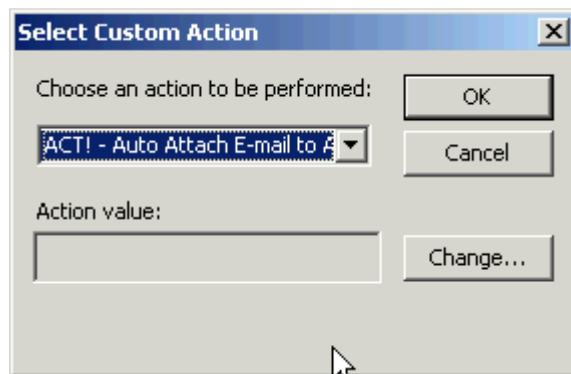
You can combine Outlook rules with a custom action to record e-mails in your ACT! database. So for example, you could set a rule that records a history for any e-mail sent by a specific ACT! contact.

To use this feature, you must first set Outlook as your default email program.

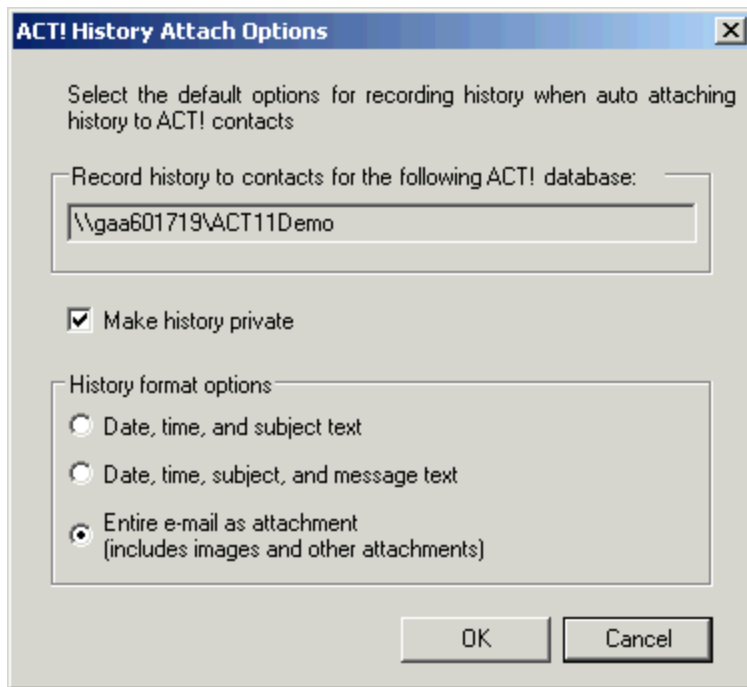
CARE: You should only use this feature if you are familiar with using Outlook Rules. Using Outlook Rules and the ACT! Quick Attach feature together will cause duplicate e-mail histories in contact history.

To Create a Rule in Outlook To Auto Attach E-mails From ACT! Contacts

1. In Outlook, click Tools, then select Rules and Alerts.
2. Click New Rule.
3. Select Start from a blank rule.
4. Select Check messages when they arrive. Click Next.
5. From the conditions list, select sender is in specified address book.
6. In the Edit the rule description section, click the specified hyperlink.
7. When the Add Address List box appears, select your ACT! database address book and click Add. Click Next.
8. From the Select actions list, select perform a custom action.
9. In the Edit the rule description section, click the custom action hyperlink.
10. From the Select Custom Action box, select ACT! - Auto Attach E-mail to ACT!
11. To choose the way that ACT! records the email in history, click the Change button.

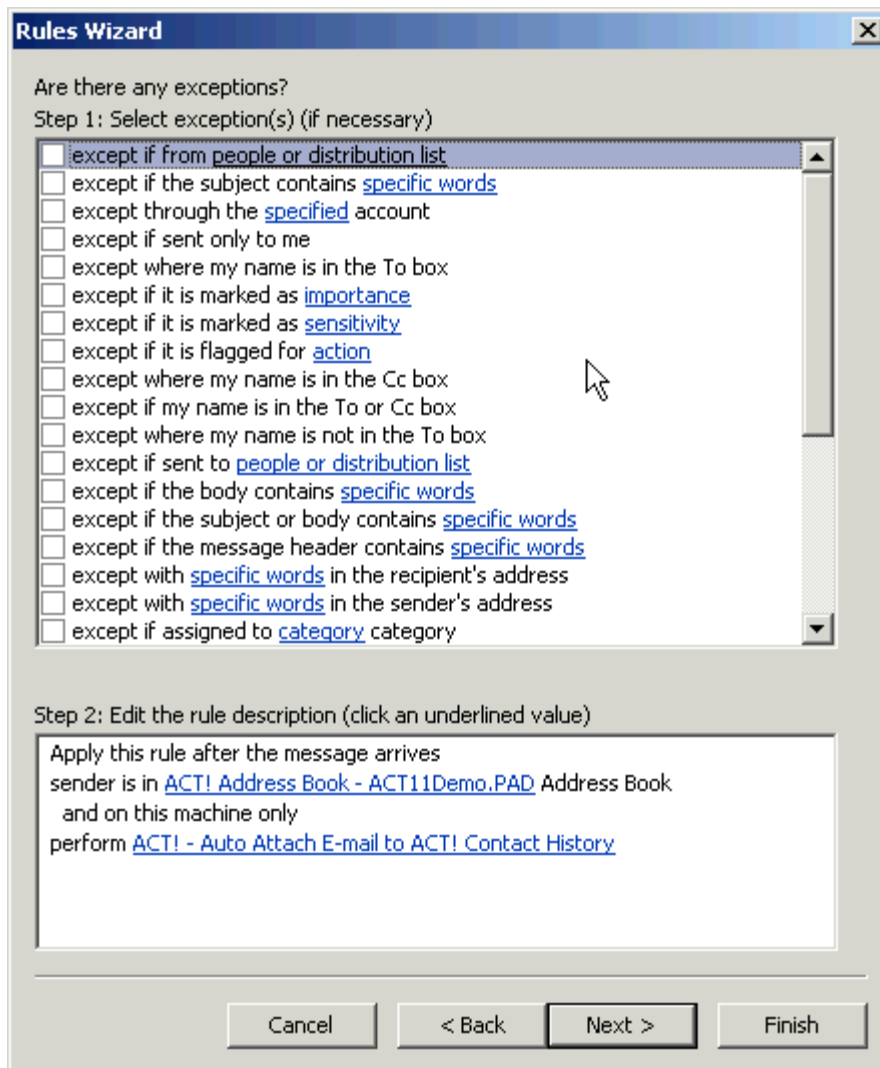


Choose how you would like the emails to appear in the contact history and whether or not you want them to be Private:



Click OK twice. Click Next.

When you are done, the rule should look like this:



Select Custom Action and any additional exceptions as desired. Click Next.

Verify the name of the rule and ensure that Turn on this rule is selected. Click Finish.

Rules Wizard [X]

Finish rule setup.

Step 1: Specify a name for this rule

ACT! Address Book - ACT11Demo.PAD

Step 2: Setup rule options

Run this rule now on messages already in "Inbox"

Turn on this rule

Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
sender is in ACT! Address Book - ESC.pad Address Book
and on this machine only
perform ACT! - Auto Attach E-mail to ACT! Contact History

Cancel < Back Next > Finish