

Act4Outlook

How do I set up Act4Outlook?

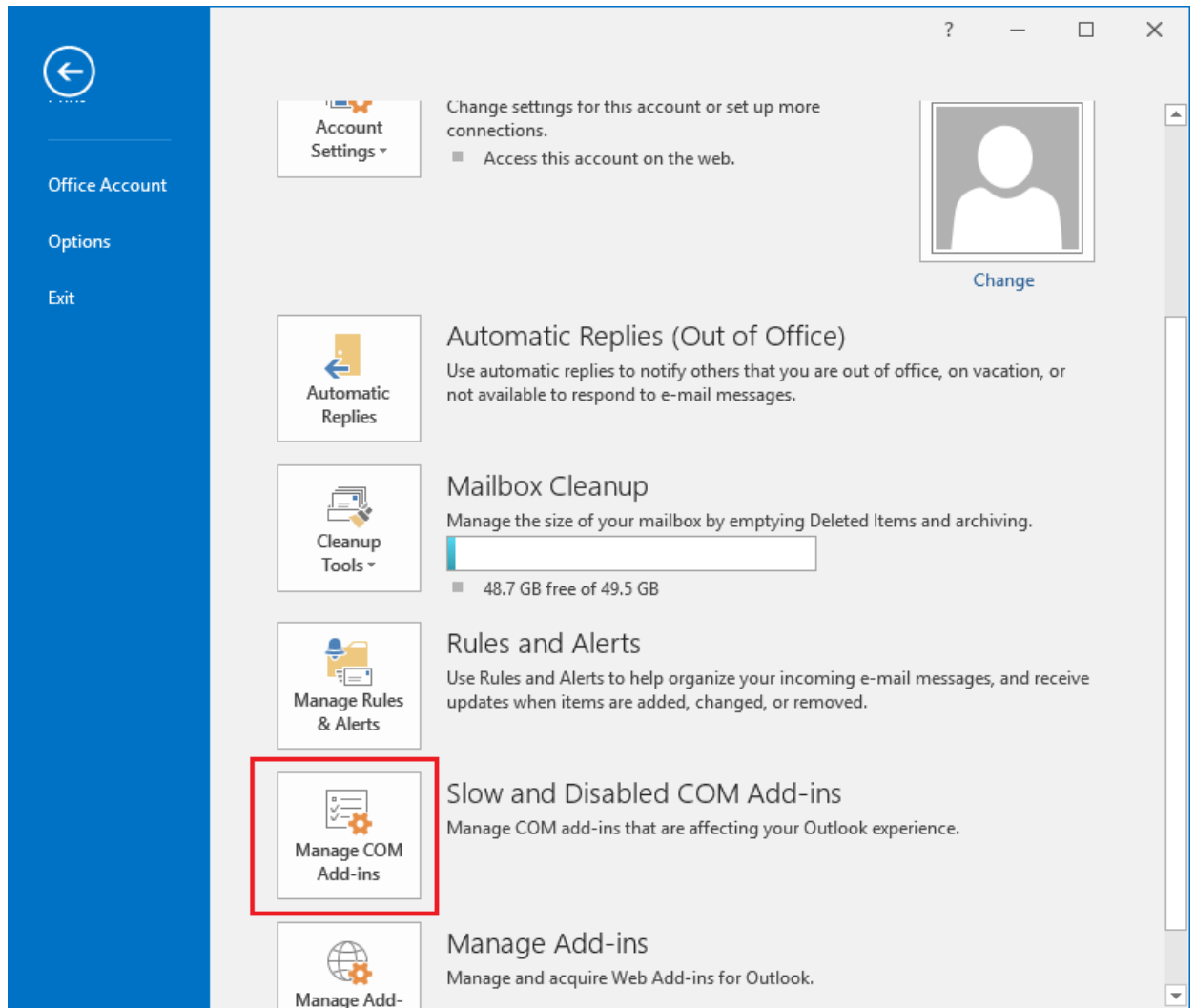
Installation

1. Download the Act4outlook setup file to your desktop or download directory. The location has to be easily accessible to you.
2. Close Act! And Outlook.
3. Double-click on the Act4outlook setup file to initiate the installation process. If you have User Access Control enabled, you will receive a security prompt to confirm the installation. Some Anti-Virus programs may attempt to intercept the installation of Act4outlook application. If yours is one of them, please disable the Anti-Virus program or disable it's real-time scanning, and then resume the installation of Act4outlook.
4. As you attempt to download the installer, you may get a download security warning from Microsoft saying the program may be unsafe to run. Proceed with the download anyway, taking care to download first instead of trying to run from the download link.
5. Once the download is complete, Microsoft may display addition warnings. Click **Actions**, and then **More Options**, and **Run Anyway**. These warnings may or may not appear based on the security settings of your computer or network.
6. You will receive a welcome screen for the Act4outlook setup program, and select **Next**
7. The next screen will display a window with the a checkbox beside the installation package it intends to deploy. Click **Next** again.
8. The next window will display the default folder destination for the Act4outlook program files is C:\Act4outlook. You can change this during the installation process, but the default is recommended. It is strongly advisable not to install the program files into your Profile, namely C:\USERS\YourName as profile security settings could interfere with the running of Act4outlook. Click **Next**.
9. The final screen will prompt you to click **Finish**, and you're done.

Configuration

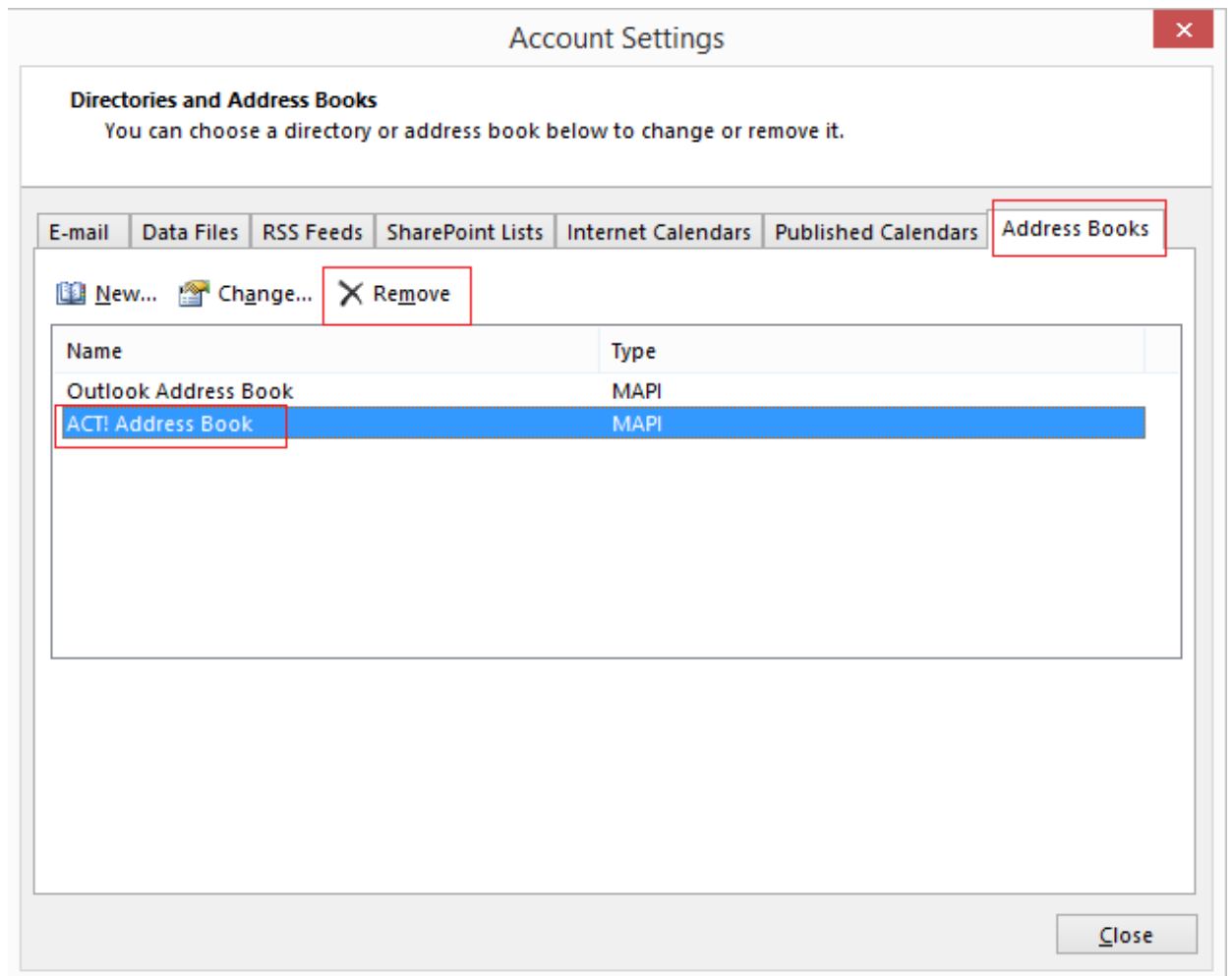
1. After completing the installation, launch Outlook. Once it is loaded, click on **File** from the top pull down menu, and then **Account Settings**. You'll be prompted to click on Account Settings again before the settings screen displays.

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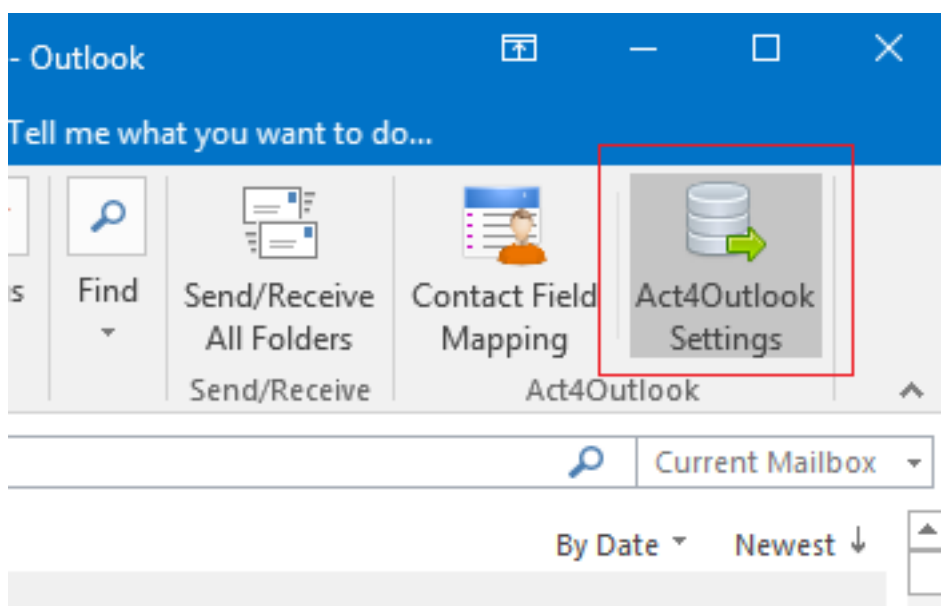


2. Click on the **Address Book** tab on the furthest tab to the right, and you should see Outlook Address Book, and Act! Address Book. Select the Act! Address Book and then click on **Remove** just above it. Once removed, click on **Close**, and then restart Outlook.

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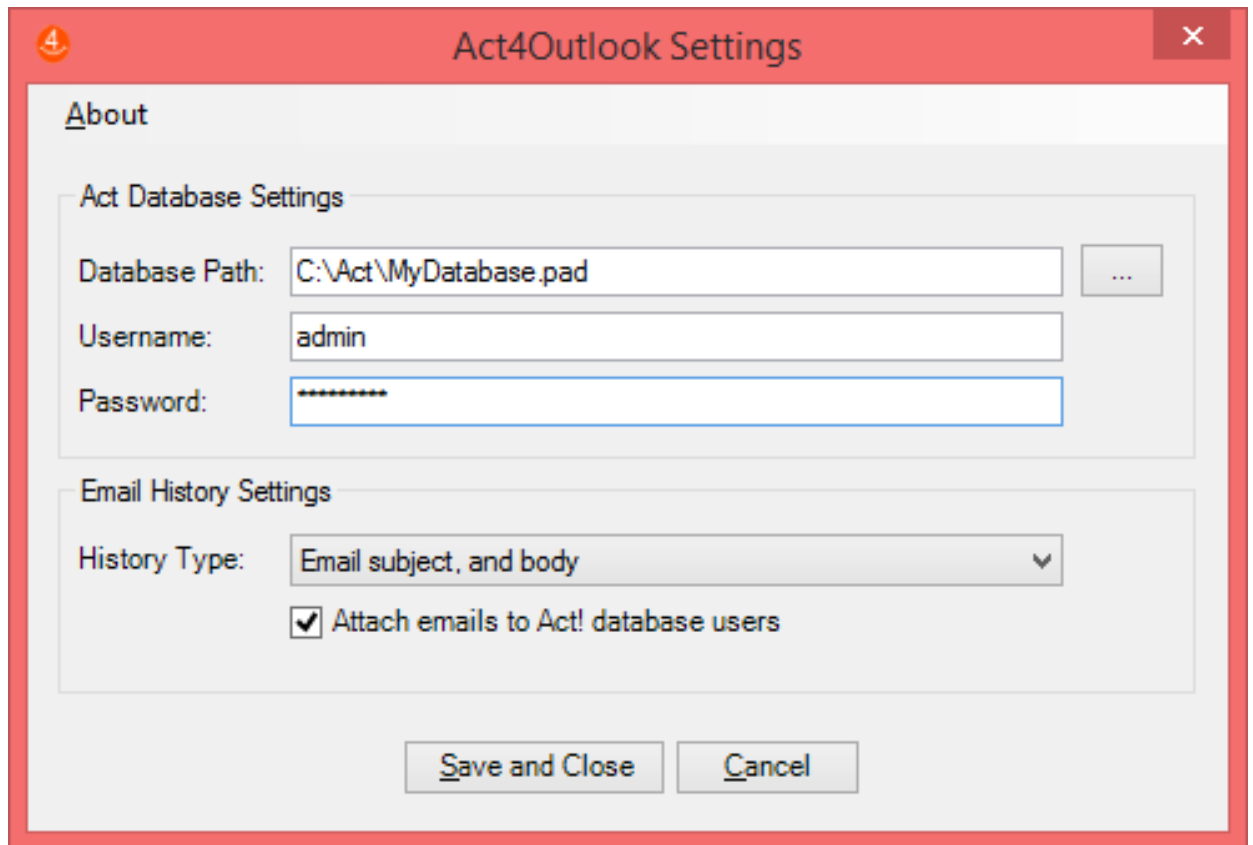
3. Once Outlook has reloaded, you should be safe to launch your Act! And beginning the configuration of your Act4outlook.
4. It's important to note all the configuration settings for Act4outlook can be found in Outlook, not Act!.
5. Within Outlook on the upper right portion of the toolbar, look for **Act4Outlook Settings**.



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6. Click on this and enter your database location, Act! User name, and Act! Password, and then **Save And Close**.

In order to find your Act database path, please refer to the following article:
[Article ID: 1007](#)



Act4Outlook Settings

About

Act Database Settings

Database Path: C:\Act\MyDatabase.pad ...

Username: admin

Password:

Email History Settings

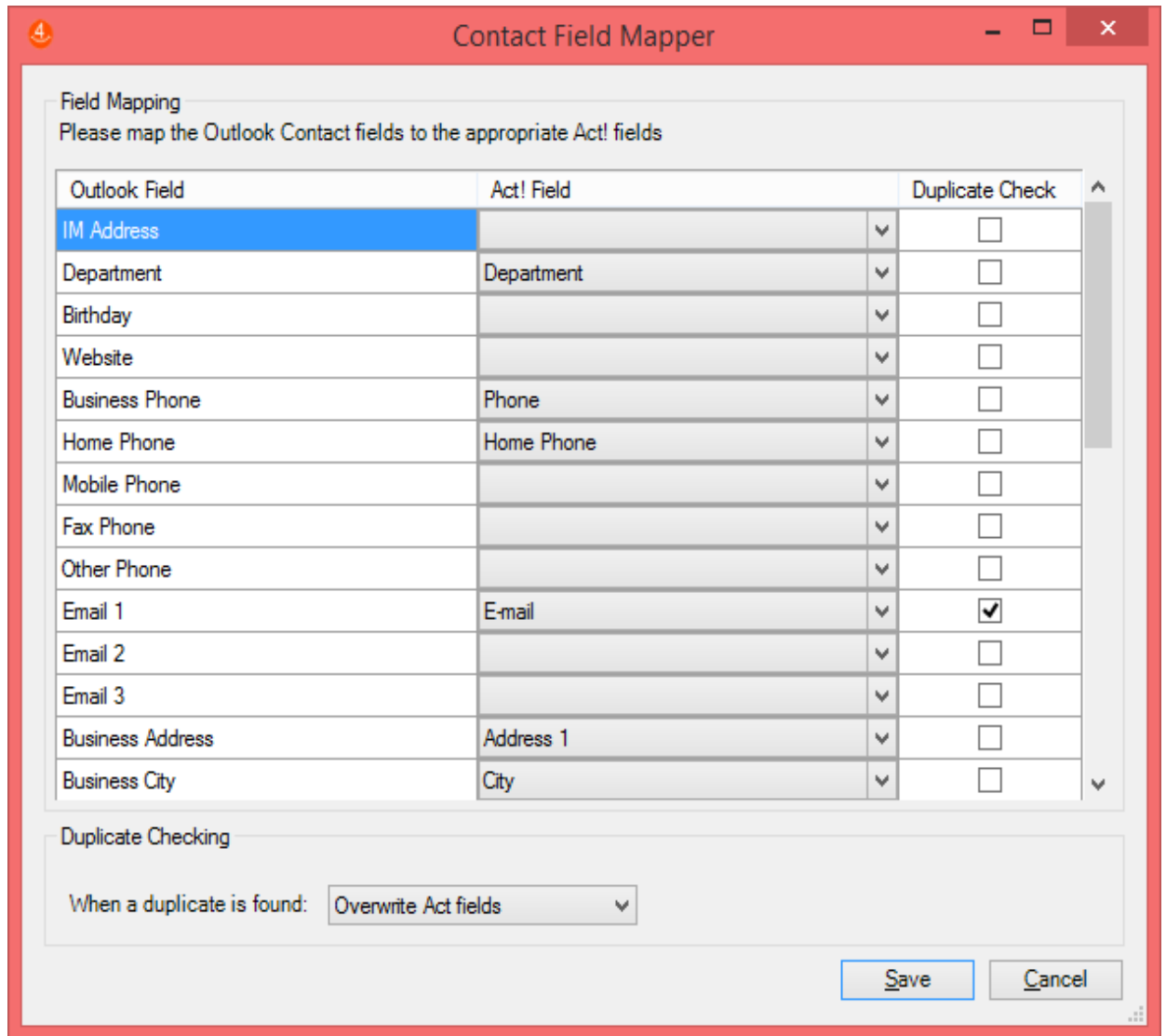
History Type: Email subject, and body

Attach emails to Act! database users

Save and Close Cancel

7. The **Act! Field mapping** icon on the toolbar of Outlook is used to map the Outlook fields to the Act! Fields in your database. By default the Contact Name, and Email address should come pre-configured, but you can enable additional mappings as needed.

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8. Once these steps are completed, you are free to start using Act4outlook on your desktop to increase your Act!/Outlook Integration and your efficiency when working with both program.

Unique solution ID: #1004

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