Integrating ACT! by Sage With Microsoft Outlook

E-mail is an integral part of any contact management system. Because so many communications with customers and prospects take place by e-mail, your e-mail communications become an essential part of the history of your contacts with the customer. With ACT! by Sage, you can choose to view and create e-mail messages from within ACT!, or you can create and send e-mail from Microsoft Outlook integrated with ACT!.

Outlook e-mail integration is popular because for many companies Outlook is the corporate e-mail standard and users are familiar with the Outlook interface. However, there are some additional capabilities you gain when using ACT! e-mail. In this article, we'll take a look at the benefits of each option.

How The ACT! To Outlook Integration Works

When choosing to use Outlook to view and create e-mail messages, you essentially set Outlook to use your ACT! contact database as an address book. In this way, when you create an e-mail in Outlook, you will be able to pick the correct e-mail address from your contacts. By setting certain system options, e-mail messages you send will automatically be saved in the History for the ACT! Contact. You also can attach messages received from

ACT! contacts, and even create new ACT! Contacts from incoming messages.

Perhaps you are sending an invitation to a non-business related event, and don't want the message stored in ACT!. A new setting within the Outlook screen will allow you to turn off the auto save function for an individual e-mail. You can simply deselect the *Save Notes/History* flag for that message.

When To Use ACT! E-Mail

When Using the ACT! interface for your e-mail program, a few additional capabilities are available. If these are important to the workflow of your organization, it may be worthwhile to standardize using the ACT! e-mail program instead of Outlook. Naturally, from within ACT! you can save all your e-mail communications to history for each contact

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just as with Outlook. Additionally, you can attach these messages to groups and companies. You can send ACT! contacts as attachments to messages. Perhaps most important is the ability to create an activity from an e-mail message. For example, you receive a response from a customer saying they don't need to place an order right now, but will probably need more stock later in the month. You can create an Activity to call the customer on the appropriate date directly from the e-mail.

If you would like to consolidate all communications with all contacts by company, you'll want to use the ACT! e-mail program. By linking each contact to the company where they work, you can have a holistic view of all communications with that company.

Linking a contact to a company in ACT! also gives you the ability to update information in the linked contact based on data from the company. Once a contact is linked to a company, any note or history created on that contact will be shared by the linked company. This means that any user having security access to the company will be able to view the shared note or history. If you want to share notes and history for some companies, but not all, you can disable sharing through the use of an option in company preferences.

Give us a call to discuss the best e-mail integration option for your organization. ✳

((Tips & Tricks))

Setting Up Microsoft Outlook As Your ACT! E-mail Program

Here are the steps to set up ACT! to use Outlook as your e-mail program:

1. Select *Options* from the Tools>Preferences menu.
2. Click on the *E-mail* tab.
3. Once the E-mail Preferences tab is opened, click on the *E-mail System Setup* button to open the E-mail Setup Wizard.
4. Select *Microsoft Outlook* when prompted to select your e-mail system, and then choose *Outlook* as your default ACT! e-mail program.
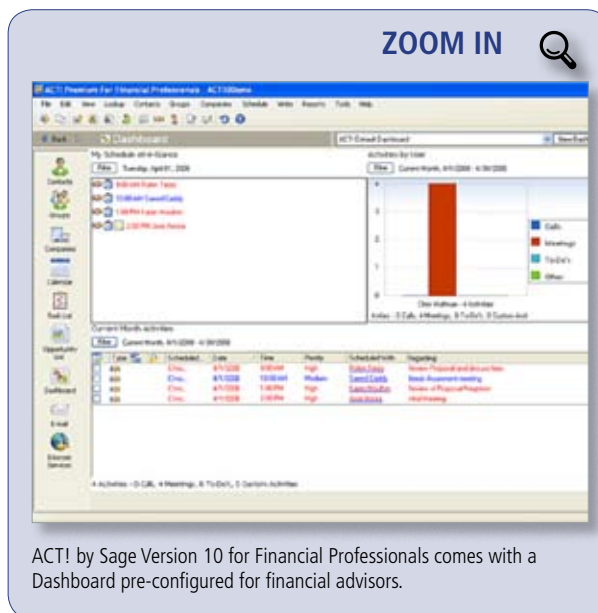
ACT! by Sage For Financial Professionals Version 10

Sage Software recently announced the availability of Version 10 of ACT! by Sage for Financial Professionals and ACT! by Sage Premium for Financial Professionals. These updated releases focus on new features and usability improvements.

Specialized Features For Financial Professionals

Version 10 is compatible with Windows Vista, and includes two new tabs specifically for financial professionals. You now can manage detailed insurance and annuity information for each contact with the new tabs.

A major highlight of the new release is the inclusion of the ACT! Dashboard, in a format pre-configured for Financial Advisors. The dashboard provides graphical views and a launchpad for quick access to all your tasks.

ZOOM IN 🔍

ACT! by Sage Version 10 for Financial Professionals comes with a Dashboard pre-configured for financial advisors.

Usability Improvements

Usability improvements for this release include the ability to edit Contact, Group, and Company Records right from the List View. You also can attach document shortcuts to History and Document items, and view the Contact and Product details within an opportunity directly from the list view.

Often there may be several decision makers involved in a particular business opportunity. With Version 10 for Financial Professionals, you are able to associate multiple contacts with a single opportunity. Opportunities also have been enhanced to improve the management of critical dates.

Improvements to Groups and Companies include the addition of advanced query features and duplicate checking. Give us a call with your questions. ✳

Currently only available in the United States