

Email Integrator For ACT!

**Incorporate Received and Sent Emails
into your ACT! contact history!!!**



**Keep track of your Email
communications with your contacts!**

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By PersonalCRM Inc.

<http://www.personalcrm.com>

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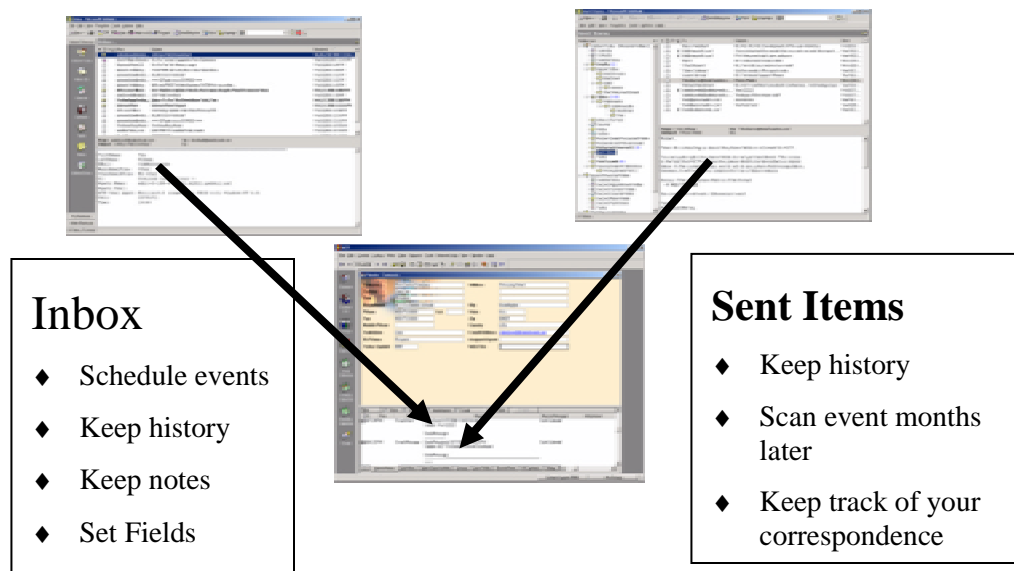
Introduction

The purpose of Email Integrator for ACT! is to provide you with a tool that will merge Outlook Email contact correspondence with your ACT! Contact even after the fact. In addition, Email Integrator integrates received emails from contacts directly with your contact history making it easy to look at the contact and see the correspondence.

Application

Email Integrator is ideal for anyone that uses Outlook and ACT! to send /receive emails and needs correspondence history of all the activity between you and the contact.

This product can be used right after the email event or months after and it will construct the history in the history records for the ACT! contact. As long as the data resides in Outlook 2000 or later, Email Integrator can take it and integrate the data with your ACT! database.



Installation

Execute the provided executable and the file will install by itself. You have 15-days to evaluate the product. Email Integrator has been developed to work with Outlook 2000 or later versions and with ACT! 2000.

Setting Up Email Integrator

The first time you run Email Integrator, backup your database before running Email Integrator.

Email Integrator is a very powerful tool and will integrate your inbox and your (optional) sent items folder with your contact database. Depending on how many emails you have in your inbox and your sent items folder, a large number of emails may be integrated with your system.

Once the first integration takes place, only new emails are integrated

A few things about email integrator



- ◆ The first time you run Email Integrator, you must indicate to Email Integrator where to deposit the emails that have been integrated. This folder will be the depository where all integrated emails are placed.
- ◆ Once an email has been integrated with your database, it no longer will be integrated again. We keep track of which emails are integrated with your ACT!
- ◆ If you run Email Integrator on a regular basis, you'll have the most up-to-date emails in your ACT!
- ◆ Email Integrator works with All Outlook Emails. Each email is saved into the directory hence you can open the email directly from the contact history.
- ◆ Outlook 2000 or higher has to be your default email browser. It will not work with any other email browser.

Email Integrator needs to know following:

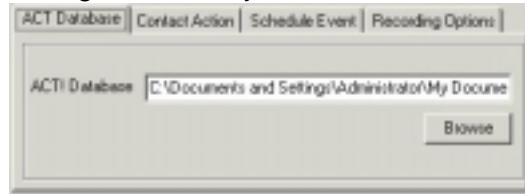
1. The ACT! Database Path. This indicates the path to the database that you are using.
2. The location where to deposit the integrated emails.



Email Integrator for ACT! operates in two modes: View Emails Mode, where you get a list of the received emails and you manually scan them; or Process All Mode where you click the button and all emails are scanned and integrated while you watch.

The ACT! Database

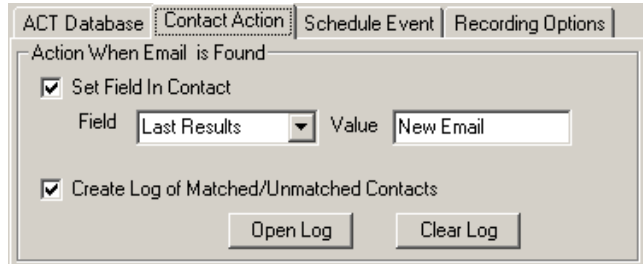
In the ACT! Database screen tab, enter the path to the ACT! database that you are using.



Contact Action Tab

The set field in contact option allows you to set a particular field on a contact when the contact is found in the database to match a received email.

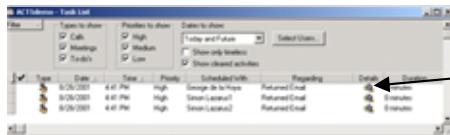
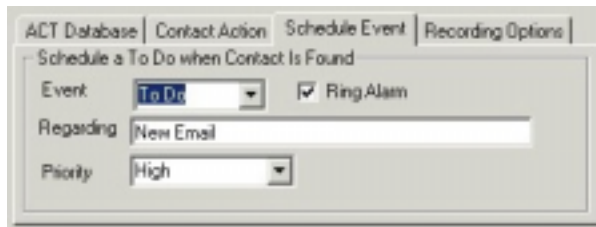
Consequently you can perform a lookup on that field for a particular value and get all the contacts in the database that have the wrong email address. By default, we provide Last Results as the field and Returned Email as the value to look for.



In addition, Email Integrator may be enabled to create a log of the email addresses that have found/not found a match in the ACT! database. This log is comma delimited for ease of import into a program to analyze it.

Schedule Event Tab

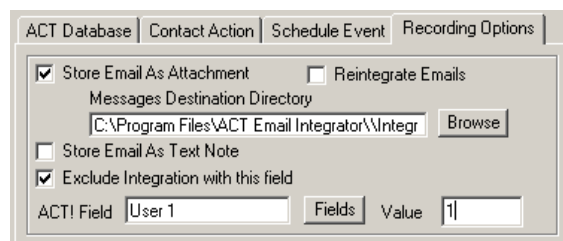
You can choose to schedule a todo that becomes immediately active when a contact is found to have sent you an email. The event has all the normal parameters, however, it has one special piece that makes this feature very powerful. If, and when, Email Integrator schedules an event for a contact, a copy of the received email is entered into the details inbox, as shown below



The received email is an attachment to the contact history details.

Recording Options

In Recording Options, you specify whether you want to save the email as an attachment (recommended) or as a text note. In addition it provides you



with the option to specify where in your hard drive you want to save your integrated emails.

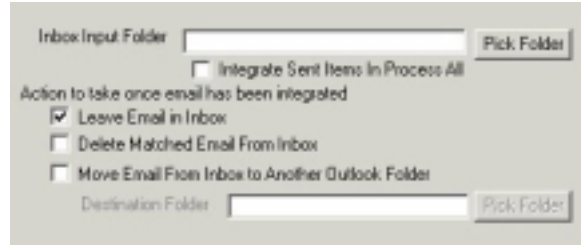
Finally, Email Integrator does not re-integrate emails. However, if you'd like to re-integrate the emails in your mailbox, check the Reintegrate Emails checkbox.

Email Integrator can also be instructed Not to Record the email depending on a value embedded in the ACT! field (Exclude Integration with this field).

Outlook 2000+ Settings

If you are using Outlook 2000+, you have 3 options:

1. Integrate Sent Items. This tells Email Integrator for ACT to search the sent items folder and integrate them with the contacts to which the email was sent to.
2. Leave the email in the email box
3. Remove the email from the email box when it has been processed.
4. Move the email from the email box to a destination folder that you specify. This is a good way to still keep the returned emails in a separate directory for later study, if needed. However, keep cleaning up the mailbox because Outlook has a limitation of 16K of items in each mailbox.



Running Email Integrator

Once Email Integrator is setup, you are now ready to run the software. The following button commands can be used from the main screen:



Inbox. Selectively integrate the inbox emails with ACT!.



Sent Items. Selectively integrate the sent items folder with ACT!



Process All. Process both the inbox and the sent items folder (if checked) without user interference.



Manual: Open the online manual for reading.



Reset Login. Clear the stored username and password for a re-login to ACT!



About. Read about PersonalCRM and Email Integrator.





Inbox Screen

In Inbox, the user is provided with the capability of integrating emails into ACT! by simply selecting one or multiple emails and pressing the integrate button as well as with the capability to perform email management.



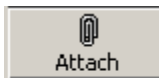
Convert

Convert Selected Email into a Contact

Convert Selected Email Into an Alias

The Convert Button provides you with 2 options:

- ◆ *Convert Selected Email into a Contact.* This option takes the selected email(s) and converts them into an ACT! contact using the 1st and Last names of the contact and the email address. In addition, it attaches the email to the contact's history.
- ◆ *Convert Selected Email Into an Alias.* Use this convert option when a contact has more than 1 email and you want to create a 2nd (or alias) email for that contact.



Attach

Attach Email to a Contact's History

Attach Email to a Group's History

The Attach Button provides you with 2 options:

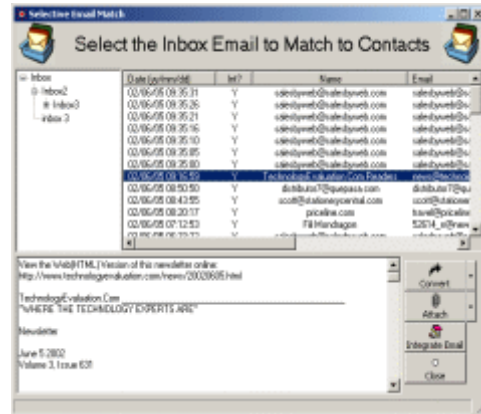
- ◆ *Attach Email to a Contact History.* You can select multiple emails and attach them to 1 or multiple contacts without setting the email address on the contact.
- ◆ *Attach Email to a Group's History.* You can select multiple emails and attach them to a group.

Integrate Email

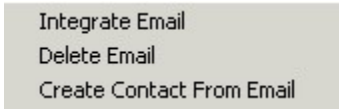
The second column in the email list indicates whether the email has been integrated or not. A Y states that it has already been integrated and a N states that it has either not been integrated or a matching contact has not been found.

To integrate an email, click on the email and then press Integrate Email and the process is done. Email Integrator will inform the user whether the email has successfully been integrated or not.

Right Button Options



1. Right click function over the email list for Contact Creation, Email Removal, or Email Integration



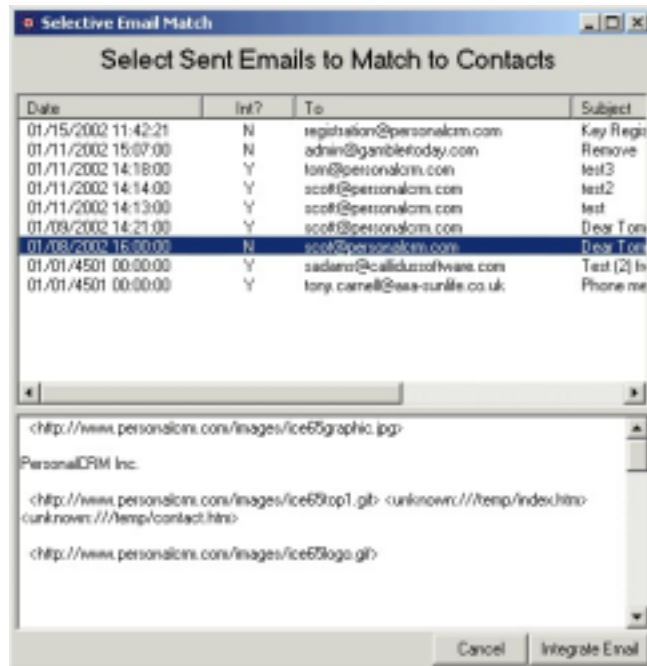
- ◆ Integrate Email. Click on this option to integrate the current selected email
- ◆ Delete Email. Click on this option to remove this email
- ◆ Create Contact From Email. Click on this option to create a new contact from the current email. Not only will the contact be created, but the email is attached as history to the contact



Selective Send Items Mail Matching

In selective Send Items matching, you select an email that has been sent out and integrate it with the corresponding contact in ACT!.

This feature is aimed to integrate any emails that reside in the sent items folder in Outlook with your ACT! Contacts.



Process All.

This action integrates the inbox and the sent items (if checked) in automated mode without user intervention.

Running Email Integrator in the Background

New with Email Integrator V2.0 is that you can setup Email Integrator to run in the background. In addition, you can execute Email Integrator via the command line.

To run email integrator in the background i.e. every 15 minutes, execute the following command from the Windows Task Manager:

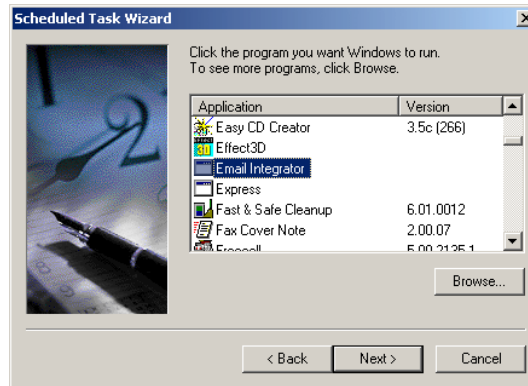
```
emailintegrator.exe -background
```

If you want Email Integrator to provide the status screen while it is integrating, enter the command below:

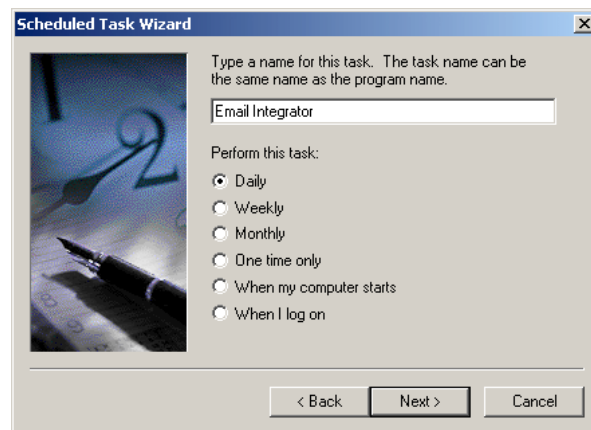
emailintegrator.exe –verbose

Setting Up Email Integrator from the Windows Task Manager to run automatically

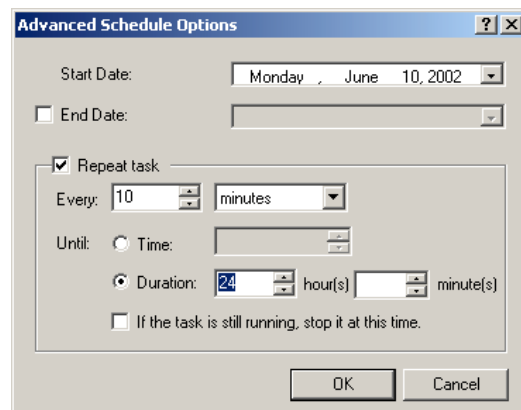
- ◆ Click on Settings->Control Panel->Scheduled Tasks->Add Scheduled Task
- ◆ Select Email Integrator to Run



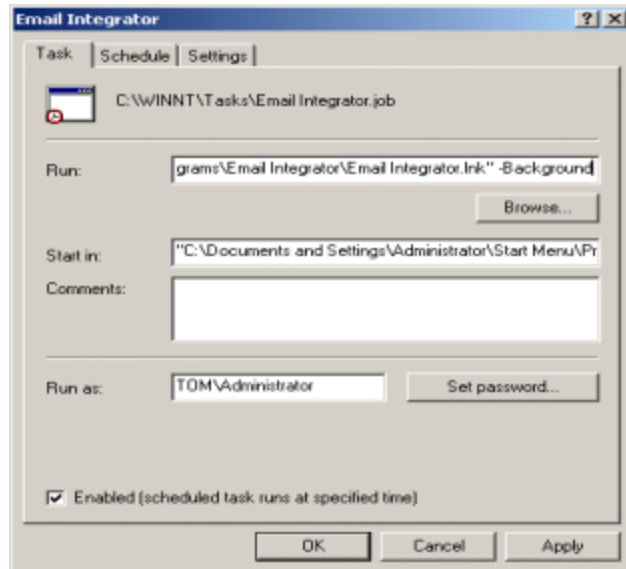
- ◆ Select Email Integrator to run Daily



- ◆ Click a few panels down and then open the Advanced Options panel. Select how often you want Email Integrator to run.



- ◆ Set the task to carry the command for Email Integrator to work in the background.



- ◆ Save the Task. You can turn on status reporting by simply adding `-verbose` to the command line.