# Act4CASL
How do I set up Act4CASL?

In order to use Act4CASL, a custom field and dropdown menu must be created. This operation can only be performed on the machine hosting the database.

If you are hosting the Act! database on your own machine, please install Act4CASL on your computer and proceed to the **Initial Setup** section below. If your Act! database is hosted on a different computer such as a server, or shared PC, then you will need to perform the Initial Setup on that machine instead. If your database is hosted by a third party hosting company, please contact your hosting provider so they can assist you with the import. Once the steps in the Initial Setup section have been performed, you may move on to the Configuration section.

Note: Please create a backup of your database prior to begining with the initial setup section.

Initial Setup

- Install Act4CASL on the machine hosting the database and log in.
- After logging in, you will be presented with the Act4CASL activation window. Enter your license key, or press **Close** to continue in trial mode.
- If logged in as an Administrator, you will be prompted to create a custom field. Click **Yes** to lock the database and create the field automatically.
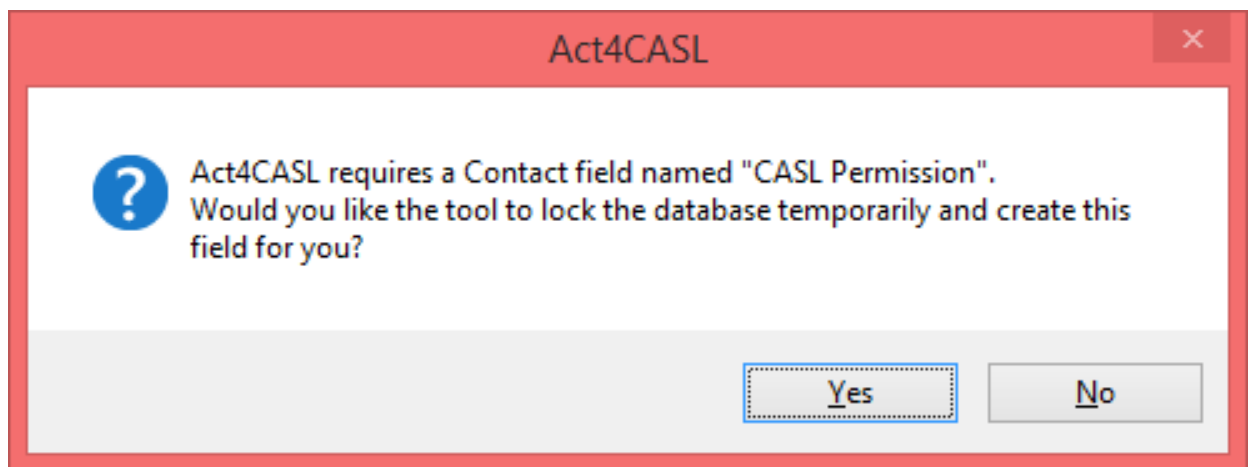

- Once the field is created, please add the "CASL Permission" field to your Contact layout. To learn more about adding fields to your layout, please refer to the following article: Article ID: 1011
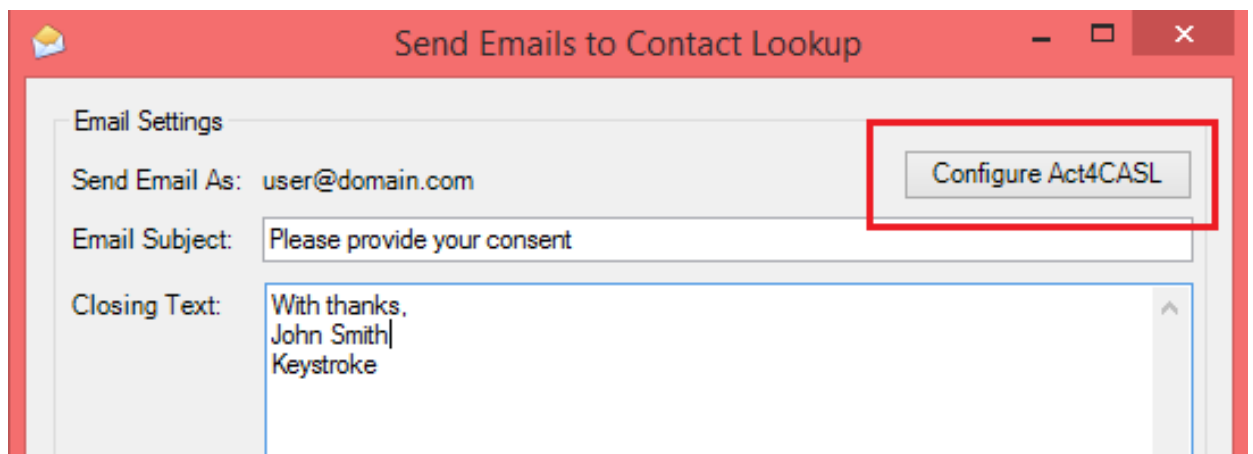
Configuration and Sending Emails

- Once logged in to the database, create a lookup of Contacts whom you wish to send the CASL permission email to.
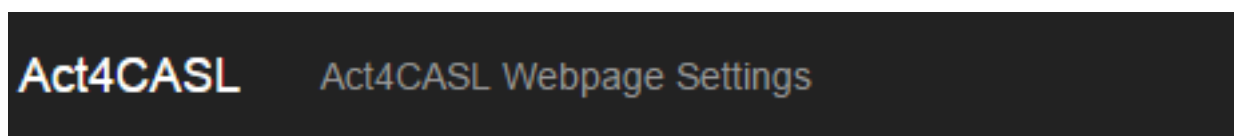- Click the menu **Act4CASL > Send Emails To Lookup**

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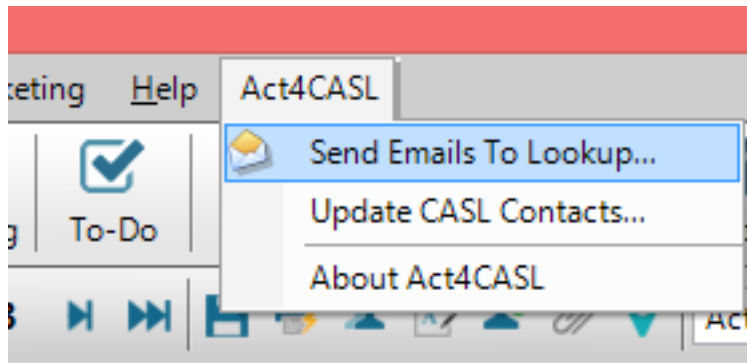
- Click the **Configure Act4CASL** button.

- In the **Account ID** field, enter your account ID. This ID can be retrieved by creating an account on www.act4casl.com. Click the **Create Account** link to visit the act4casl website.
- Once registered and logged in, click the **ACT4CASL Webpage Settings** link near the top of the page.

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- On this page, you can enter your company name, URL, and a custom message that your Contacts will see once they click on the unique link sent by Act4CASL. You can also upload a company logo. Copy and paste the **Account ID** in the Act4CASL act plugin.

- In the **Send Email As** section, enter your SMTP mail server settings. Since you will likely be sending our hundreds of emails, it is recomended that you sign up for a email service, such as www.sendgrid.com

  If you wish to use your internal email server settings, please contact your email provider/IT Administrator and they should be able to assist you with entering the correct settings.
- Once all fields are populated, click the **Save** button.

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- Enter an **Email Subject** and **Signature** which will be used to send the email to your contacts. Click the **Refresh Preview** button to preview the email message.
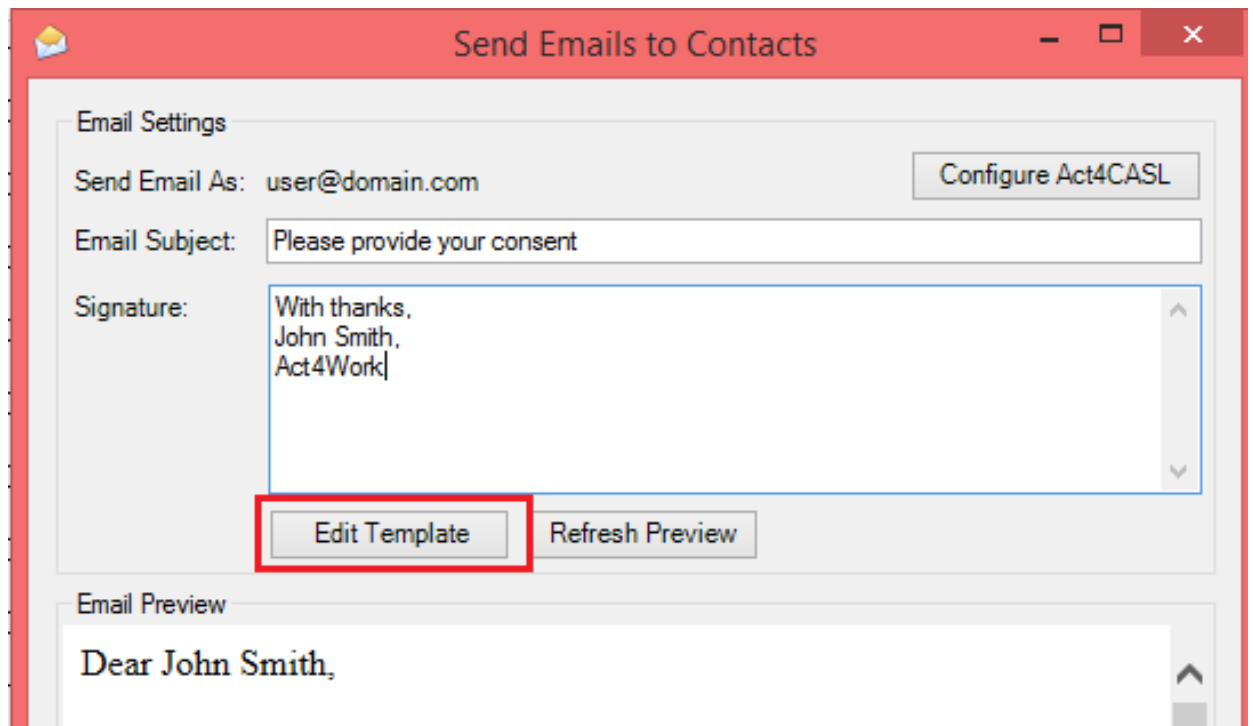
- If you wish to change the content of the email, you may click the **Edit Template** button, which will open up the email template for editing.

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- Your email template will open up in notepad. If you wish to include any Contact fields in the template, please enclose the field name in angled brackets **<>**.
  See highlighted sample below for an example for the Contact name field.

- After making the necessary changes, save and close the notepad file and click the **Refresh Preview** button to confirm the changes were saved successfully.
- Once satisfied with the template, click the **Send Emails** button. On the

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following popup, select whether you wish to send emails to the current contact, current contact lookup, or all contacts in your database. For testing, it is recommended that you lookup your own Contact record by clicking the menu **Lookup > My Record** and then selecting the **Current Contact** option. Once satisfied, you can send the email to the rest of your Contacts. Each contact will be sent a unique link which they can click to indicated if they wish to be contacted or not.

- If you need to retrieve the unique link for a particular Contact click the menu **Act4CASL > Generate Unique Link**
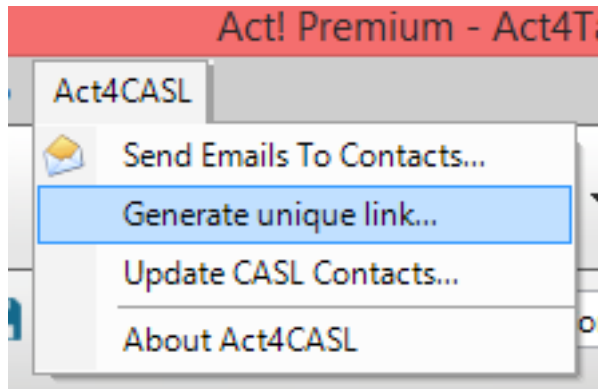
- After clicking this menu option, the unique CASL consent link for that Contact will be copied to your clipboard. You may now past this in an email and send it to the Contact manually.

Updating Contact Permissions

- Once you have sent emails to your contacts, it is recommended to **Update** your database occasionally and download their choices.
- Click the menu **Act4CASL > Update CASL Contacts.**
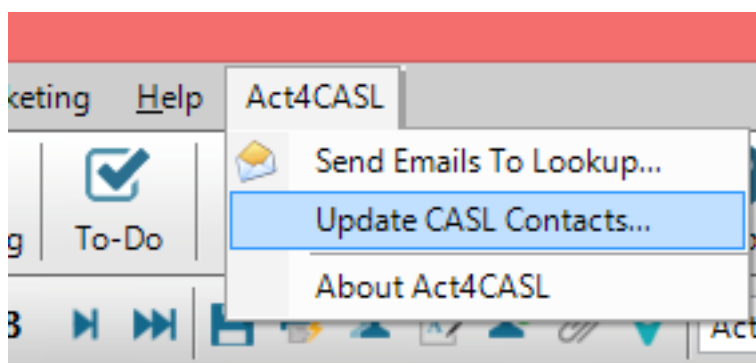
- All contact responses will be downloaded one by one. The **CASL Permission** field will be updated to reflect their choices and a history record will also be created for each contact.
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