

Act4Outlook

Emails messages are not attached to Act! automatically

If Act4Outlook is enabled, activated, fully configured, and Email messages are still not attaching properly to the Act! database, it may be because of one or more of the following conditions.

Email Address not entered in Act

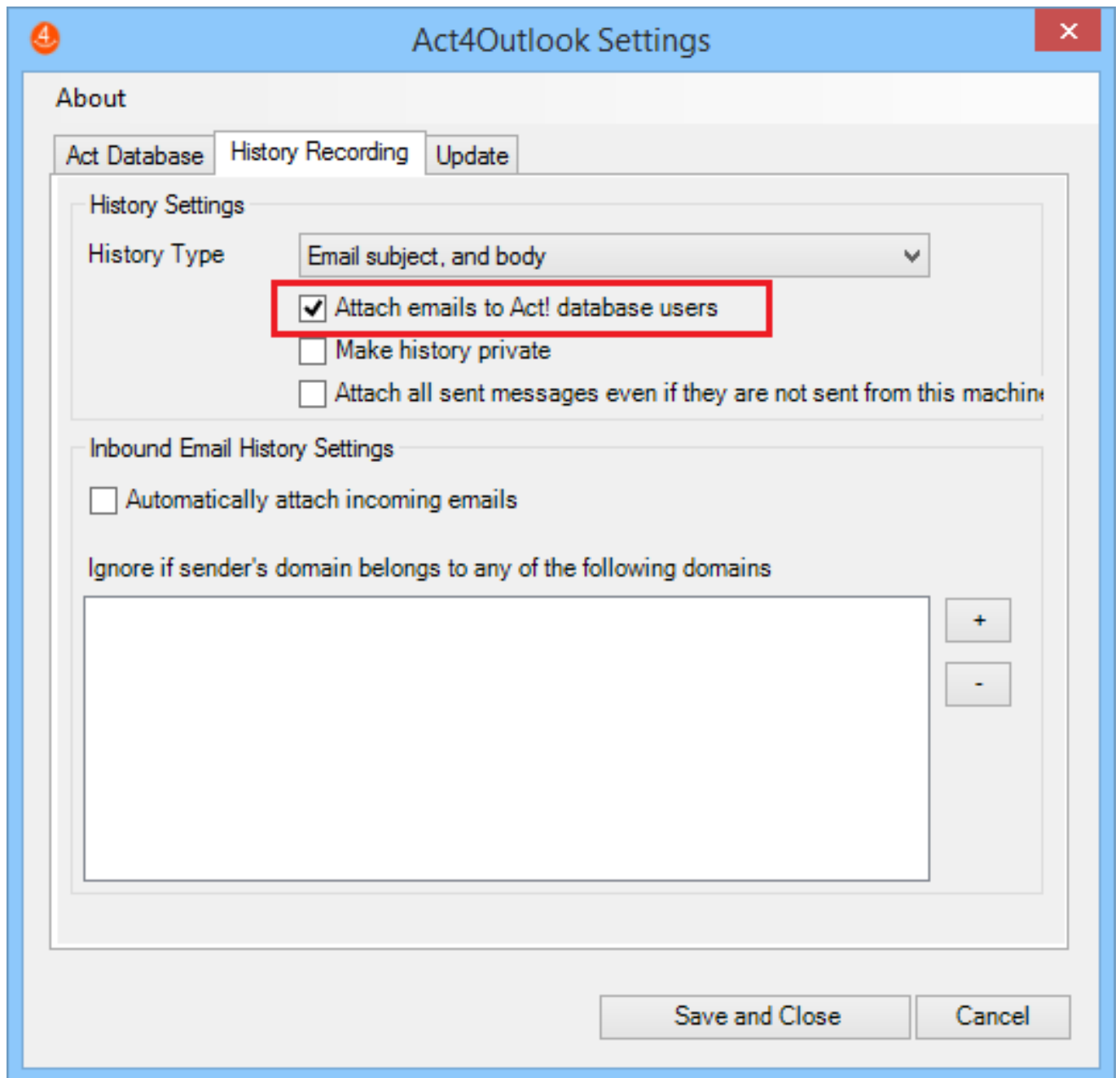
In order for automatic history recording to work, your email address must be entered in an email field in Act such as E-mail, Personal Email etc. If you have multiple email address that you send from in Outlook, they all must be entered on your Act Contact record. To verify this, please log in to Act! and press the menu **Lookup > My Record**. Ensure your email addresses are entered in email fields. If not, please enter them, save the record, and try again. **Note:** The field type of the field in Act! must be **E-Mail**. Using regular Character fields is not supported

Emails send to Act! users without enabling the Act4Outlook Setting

If you send an email to a Contact that is also an Act! user, emails sent to this Contact will not attach by default. For example, if you send an email to yourself or a co-worker who also uses Act, the emails will not be attached. If you are sending these emails for the purpose of testing, send the email to another Contact that is not a user. To allow emails sent to users to be attached, follow the steps below:

1. Click the **Act4Outlook Settings** button on the Home tab of Outlook.
2. Click the **History Recording** tab, and enable the **Attach emails to Act! database users** option.
3. Click **Save and Close** and restart Outlook.

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Restart Outlook

After initial setup, or changing any settings, you must remember to restart Outlook otherwise these settings will not apply and cause issues with history recording. If you are having issues with history recording, simply restart Outlook first and see if that fixes the issue. If not, please continue with the article below.

Incorrect database set in Act4Outlook Settings

Click the **Act4Outlook Settings** button and ensure the correct database path is set up. If you have recently switched databases, it will be necessary to update the

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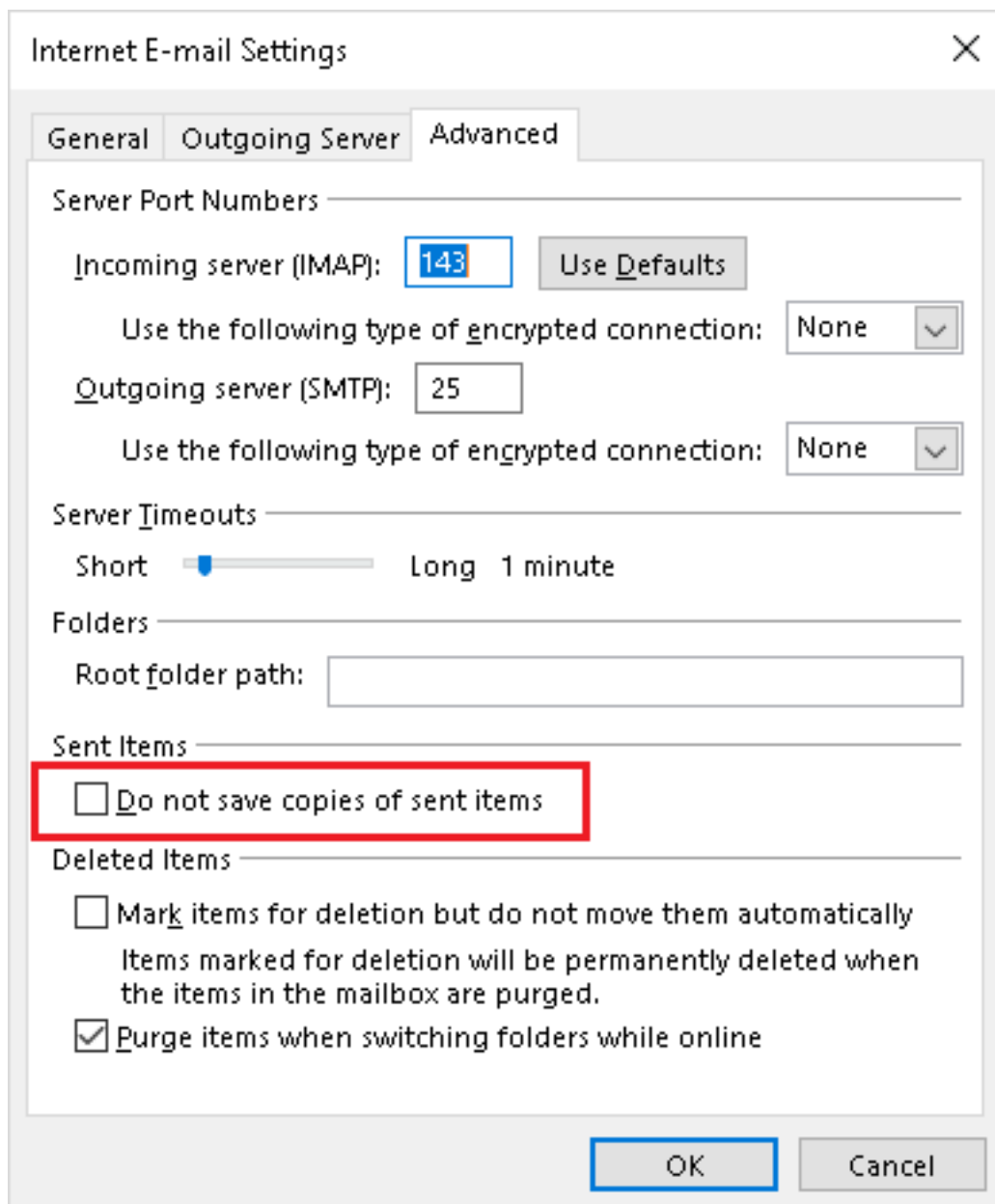
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database location in Act4Outlook as well.

Messages not saved to Outlook Sent folder

In order for emails to attach to Act! once the user presses the **Send** button, the emails must be saved to the Sent Items folder in Outlook. If Outlook settings are set to not save copies of sent items, it could cause issues with Act4Outlook history recording. Please follow the steps below to ensure this option is not enabled.


- Click File > Account Settings. Open up the Advanced settings of the affected email account.
- Under the **Advanced** tab, ensure the **Do not save copies of sent items** is **unchecked**.
- Restart Outlook and send a test email to verify emails are now recorded properly.





Email Account Excluded

If user accidentally excluded the email account from automatic history recording, this will prevent emails from being recorded automatically. Please ensure the email is **not** checked in the **Excluded Outlook Accounts** section of Act4Outlook settings as shown below:

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 Act4Outlook Settings ✕


Skin Selector
▼
Visual


About
▼
Help

Note: Changes to settings in this area require a restart of Outlook to take effect.

Act! Database History Recording Exclusions

History Attachment Type

Attach As: Email subject, and body ▼

History Type ▼ Load

☐ Attach emails to Act! database users

☐ Make history private

☐ Attach all sent messages even if they are not sent from this machine.

☒ Change icon for mail messages that are attached successfully

☐ Automatically attach incoming emails

History Linking

☐ Link recorded emails to the associated Contact's Company automatically.

☐ Link recorded emails to the associated Contact's open opportunities automatically.

☐ When sending emails, prompt to create Contact if not found in database

Excluded Outlook Accounts

Ignore automatic history recording from the following accounts:

☐ [REDACTED]@keystroke.ca

Save and Close Cancel

Unique solution ID: #1021

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