Linking Received Emails to the ACT! Contact

Many people have asked us how to link incoming emails to the appropriate contact record in ACT! Follow these best practices procedures:

Open Email in ACT! Highlight the desired received or sent email you want to attach Right click on the highlighted email and left click on Attach to Contact Select the appropriate contact(s) to link the email to

The email will now be attached to the Notes/History tab in ACT!

To link all the emails someone has sent you to their contact record follow these steps.

In the email window in ACT!, click on the From header. This sorts the emails by sender. Highlight the first email of the desired contact Hold down the Shift key and click on the last email for the desired sender. Right click on the highlighted emails and left click on Attach to Contact. Select the appropriate contact(s)

Be careful with this step since you could easily add the message more than once to the contact if you repeat the step later.

Alternately, you attach emails from within Outlook following the same procedures but this process is slower that it is from within ACT!
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