Allied Financial Software Knowledgebase

Understanding How History is Created When Using Microsoft Outlook as Your E-Mail Client in ACT!

Question
You want to know how and where ACT! history is created when using Outlook.
Answer
ACT! can create history items when using Outlook® e-mail. There are three conditions that must exist for this to occur. 1.   You must integrate Outlook with ACT! by adding your ACT! database(s) as address books in Outlook.
Please refer to the following Knowledge Base Answer for detailed information: Title: How to Add My ACT! Address Book to Microsoft Outlook 2003, Outlook 2002 (XP) or Outlook 2000   Title: How to Add My ACT! by Sage Address Book to Microsoft® Outlook® 2007   2.   You must set up a default database and history option in Outlook to create the history in ACT!. Please refer to the following Knowledge Base Answer for detailed information: Title: How to Set the ACT! Default History Type in Microsoft Outlook   3.   You must select a contact that exist in the default database. If you setup more then one ACT! database as an address book in Outlook; history can only be created for the default database. This is determined by the database selected in the Record history to contacts in the following database from the drop-down of the ACT! History Options dialog box in Outlook. Note: You must Refresh the view in ACT! before new History items will appear.