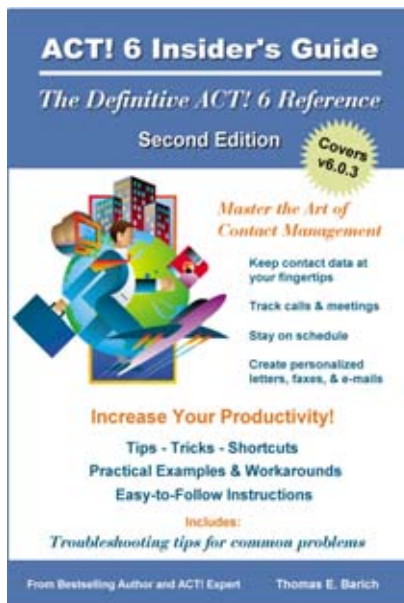


# Sample Chapter

## ACT! 6 Insider's Guide, 2<sup>nd</sup> Edition



***“Includes ACT! v6.0.3 Coverage!”***

**Title:** ACT! 6 Insider's Guide, 2<sup>nd</sup> Ed.

**Author:** Thomas E. Barich

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**Description:** The ultimate guide to mastering ACT! 6 from best selling author and ACT! expert, Thomas E. Barich, has been updated to include coverage of the latest version of ACT! - v6.0.3. Now, you can learn to use multiple e-mail signatures, create activities from email messages, integrate Eudora with ACT!, and more.

Whether you're new to ACT! or an experienced user, you'll find everything you need to get up to speed quickly with version 6. The ACT! 6 Insider's Guide offers in depth coverage of essential features such as e-mail, mail merge, database maintenance, reporting, layout design and much more, combined with easy to follow instructions. It also provides plenty of tips, tricks, and shortcuts to help you save time, and work efficiently. You'll even discover workarounds for handling program limitations and bugs.

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# ACT! 6 Insider's Guide

## Chapter 10



### In This Chapter

Setting Up Internet Email

Using Outlook E-Mail

Using Outlook Express

Configuring E-Mail Preferences

Composing And Sending Email

Receiving And Replying To Email

Working With Attachments

Organizing E-Mail



## Configuring and Using E-mail

Despite the changes made to the ACT! e-mail client in version 6, it still has a long way to go. A number of improvements have been made, including support for the popular Eudora e-mail client (ACT! 6.0.3 or higher only), and the ability to send HTML messages. Unfortunately, the new e-mail client still doesn't provide the functionality and features required by most business users today. While there is tighter integration with Microsoft Outlook e-mail, a number of issues still remain that make it less than an ideal marriage.

*Note: Significant changes were made to ACT! e-mail in the 6.0.3 update. Therefore, if you are running an earlier version of ACT!, some of the information and figures contained in this chapter (which covers 6.0.3) will be different. You may want to visit the ACT! website ([www.act.com](http://www.act.com)) and download the latest update.*

The e-mail clients supported by ACT! 6 include the following:

- ACT! e-mail client
- Microsoft Outlook 2000 or 2002 (XP)
- Outlook Express 5.5 or 6.0
- Lotus Notes 5.0
- Eudora 5.2 (ACT! 6.0.3 and higher)

For basic e-mail functionality, the ACT! e-mail client will probably suffice. But for those whose e-mail needs are somewhat more sophisticated, Microsoft Outlook integration is probably your best bet.

## Choosing Your E-Mail System

Regardless of which e-mail client you plan to use, you'll have to let ACT! know about it. There are two ways you can accomplish this - either with the QuickStart Wizard, or with the E-mail Setup Wizard. In reality, they are both the same. The QuickStart Wizard incorporates the E-mail Setup Wizard as one of its components. Therefore, no matter which method you choose, the steps will be identical for the actual setup procedure. The only difference is how you reach those steps.

To launch the QuickStart Wizard choose **Help | QuickStart Wizard** from the menu bar. You'll have to move through the first three (or four if you WinFax installed) screens by clicking **Next**, before encountering the e-mail system setup.

You can access the E-mail Setup Wizard (see Figure 10-1), through the Preferences dialog box. Choose **Edit | Preferences** to open the Preferences dialog box. Click the **E-mail** tab to view the e-mail options, and then click the **E-mail System Setup** button. The QuickStart Wizard screens are identical to those in Figure 10-1 except for the screen titles, and an option to *Skip e-mail setup*.

The first e-mail setup screen you encounter lists all the supported e-mail clients you have installed on your computer. To use a client place a check next to its name. While most people will probably use only one e-mail client, those with multiple e-mail addresses may decide to use more. ACT! does not support multiple sender e-mail addresses unless each is using a different e-mail client.

If you have an Internet e-mail account (as opposed to an in house company e-mail system such as Microsoft Exchange Server) that you'll be using with one of the supported e-mail clients, you will need some information that should have been supplied by your ISP (Internet Service Provider). Unless you have your username, e-mail address, password, SMTP server (outgoing mail), and POP server (incoming mail) you won't be able to complete the setup.



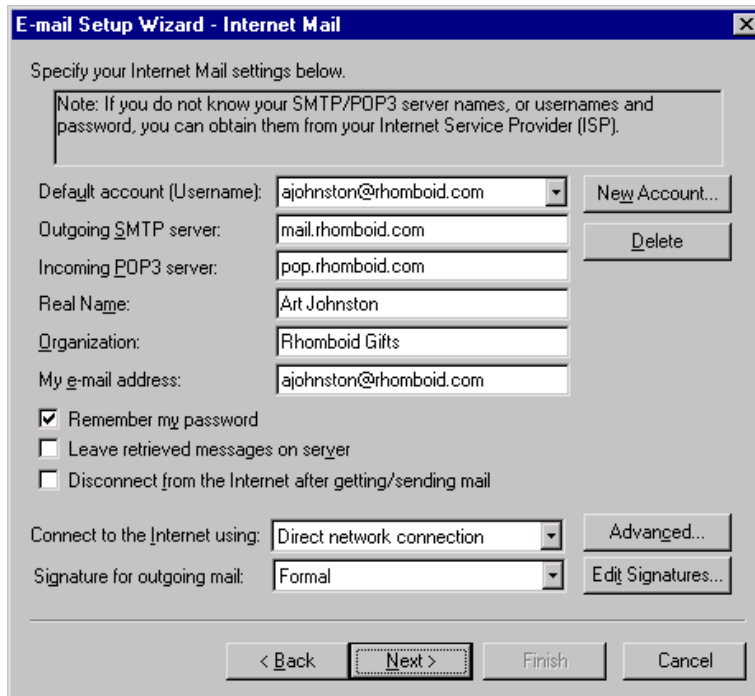
**Figure 10-1:** Select the e-mail clients you want to use.

## Setting Up Internet Mail

If you plan to use the ACT! e-mail client choose *Internet Mail* and click **Next** to view the Internet Mail configuration settings screen shown in Figure 10-2.

Fill in the Internet Mail settings with the appropriate information:

- **Default account (Username).** This is the name that you use to log in to your e-mail account, and should be supplied by your ISP. Some ISPs use your entire e-mail address as your user name. If that's the case, keep an eye on the way ACT! handles it. You may find that ACT! automatically cuts off the @ symbol and everything that follows. If so, just reenter it.



**Figure 10-2:** ACT! needs the basic information about your Internet e-mail account.

- **Outgoing SMTP server.** The SMTP (Simple Mail Transfer Protocol) server is the computer that your outgoing mail is sent to at your ISP. From there it is distributed to the recipients that you've addressed it to. This is another piece of information that should be supplied by your ISP.
- **Incoming POP3 server.** This is the computer at your ISP that holds all your incoming mail until you log on and download (receive). The POP3 stands for Post Office Protocol version 3. Your ISP can supply this information as well.
- **Real Name.** This is the name that will appear in the *From* field on e-mail messages you send to others.
- **Organization.** This field, which is purely informational and does not appear anywhere in e-mail messages you send, is for your company name.
- **My e-mail address.** Enter the e-mail address that you chose or were assigned when you signed up for the Internet e-mail account. If you don't have the information handy, your ISP can supply it.
- **Remember my password.** The first time you log on to your e-mail account you'll have to supply the password that was assigned to you, or chosen by you. If you want ACT! to remember it and enter it automatically each time you log on to the e-mail account, check this option. The only drawback to this is that anyone else with access to your computer will be able to send and receive e-mail using your account.

- **Leave retrieved messages on server.** If you check this option, ACT! leaves a copy of your received e-mail messages on the POP3 server, so that you can download them at a later time, from a different computer. It's important to note that you cannot download the messages to the same computer twice. It must be a different computer.
- **Disconnect from the Internet after getting/sending mail.** This handy option ensures that you don't check your e-mail and stay connected for the rest of the day (or at least until your ISP knocks you off). When this option is checked, ACT! disconnects after your finished sending and receiving e-mail. It's a must for anyone who is paying for time on line by the minute. If you connect to the Internet through a network connection, this option will have no effect.
- **Connect to the Internet using.** Select the connection you want to use to connect to the Internet to access your e-mail account. The drop down list displays all the connections you currently have configured. To set up a new connection choose Start | Run to open the Run dialog box. Enter **icwconn1.exe** in the *Open* text box and click **OK** to launch the Internet Connection Wizard. See the Windows help file for details on using the wizard.
- **Advanced.** The Advanced dialog box, which appears when you click the **Advanced** button, offers the ability to change your authentication method from *Passwords* to *APOP*. Since most Internet accounts use passwords you probably won't have to change this one. Check with your ISP if you're unsure. In addition, the **Test Internet Connection** button provides a quick test of the selected connection to ensure that it is working properly.
- **Signature for outgoing mail.** Use this drop down list to set a default signature to be automatically attached to all outgoing mail when using this e-mail client.

***Tip:** Signatures in ACT! 6 versions prior to the 6.0.3 update are incompatible with signatures in ACT! 6.0.3 and higher. To avoid problems after the update add at least one new signature after you update. If you still encounter problems you'll have to modify the Windows registry. **As always, make a backup of the registry before making any changes.** Close ACT! and delete the value in the `HKEY_CURRENT_USER\Software\Symantec\ACT!\Email\Intialtext` key. Close the registry and reopen ACT!.*

- **Edit Signatures.** To add, remove, or edit signatures click the **Edit Signatures** button to open the Signatures dialog box.

***Note:** You cannot use MSN as an Internet Service Provider (ISP) with Internet Mail. MSN uses Secure Password Authentication (SPA) for passwords. ACT!'s Internet Mail does not support SPA. However, if you use Outlook, Outlook Express, or Eudora (all of which support SPA) as your primary e-mail system, you can use your MSN account. See the software's help file for details on configuring authentication.*

If you have multiple Internet e-mail accounts you can click the **New Account** button to display a blank Internet Mail screen with which you can set up additional accounts. If you set up multiple accounts ACT! will receive mail for each account every time you check your e-mail. However, only one Internet mail account can be used as the account from which you send messages. Therefore, to use a different account as the From account, you'll have to return to the E-mail Setup Wizard and select the account you want to use from the *Default account (Username)* drop down list.

**Tip:** If, after setting up multiple accounts you find that you cannot access any of them, and return to the Internet Mail screen only to find the form blank, you may have a corrupt Windows registry entry. **Warning:** Only experienced users should edit the registry as making changes to the registry can adversely affect your computer. Always backup your registry before making changes. You can correct this problem by closing ACT!, and using the registry editor to delete the `DefaultAccount` data item found in `HKEY_CURRENT_USER\Software\Symantec\ACT!\internet\Accounts` key. When you restart ACT!, the entry is recreated with a value of 0.

## Using Outlook E-Mail

If you have Outlook 2000 or Outlook 2002 (XP) installed you can opt to use either one as the e-mail client in ACT!. This enables you to take advantage of some of the more advanced e-mail features in Outlook and still be able use your ACT! contact database.

**Tip:** If you're running Outlook 2000, it must be configured as Corporate or Workgroup, not as Internet Mail Only. You can determine your Outlook setting by choosing *Help | About Microsoft Outlook* from the menu bar. If you're running in the Internet Mail Only mode, open the Options dialog box (*Tools | Options*), click the **Mail Services** tab, and click the **Reconfigure Mail Support** button to change to Corporate or Workgroup. Make sure you have your Office CD handy.

To use Outlook as your e-mail client you must open the E-mail Setup Wizard first. Choose **Edit | Preferences** to open the Preferences dialog box. Click the **E-mail** tab to view the e-mail options, and then click the **E-mail System Setup** button to launch the E-mail Setup Wizard. Check the *Microsoft Outlook* option and click **Next** to display the Microsoft Outlook screen. If you've also checked the *Internet Mail* option, you'll encounter the Internet Mail setup screen first. Complete it and click **Next** to display the Microsoft Outlook screen.

The Microsoft Outlook screen contains four options:

- **Change Outlook Setting.** This button opens the Windows Control Panel Mail applet, which contains the settings for your Outlook accounts, profiles, and other e-mail options. See your Outlook help file for details on configuring Outlook.
- **Always use default Outlook profile.** This option tells Outlook to automatically use the profile you've set as the default, rather than prompt for a profile to use each time you launch Outlook.

- **Signature for outgoing mail.** If you have multiple signatures you can select one from this drop down list to be used as the default for all outgoing mail sent with this e-mail client.
- **Edit Signature.** Click this button to open the Signatures dialog box where you can add, remove, or edit signatures.

***Note:** Before you decide to use Outlook as your primary e-mail system you should be aware of exactly how the ACT!/Outlook integration works. It is not, unfortunately, a smooth, well planned integration. To begin with, when you create an e-mail message in ACT!, the ACT! e-mail client opens, not Outlook. It contains the Outlook folders, but none of the Outlook functionality. Now comes the really bad part - outgoing e-mails are placed in the Outbox and will not send until you open Outlook and click the **Send/Receive** button [in Outlook]. This means you must have both e-mail clients running to send a message if you're using Outlook as your primary e-mail client. Once Outlook is open you can create and send messages from it, however, any messages initiated in ACT! will go through the ACT! e-mail client.*

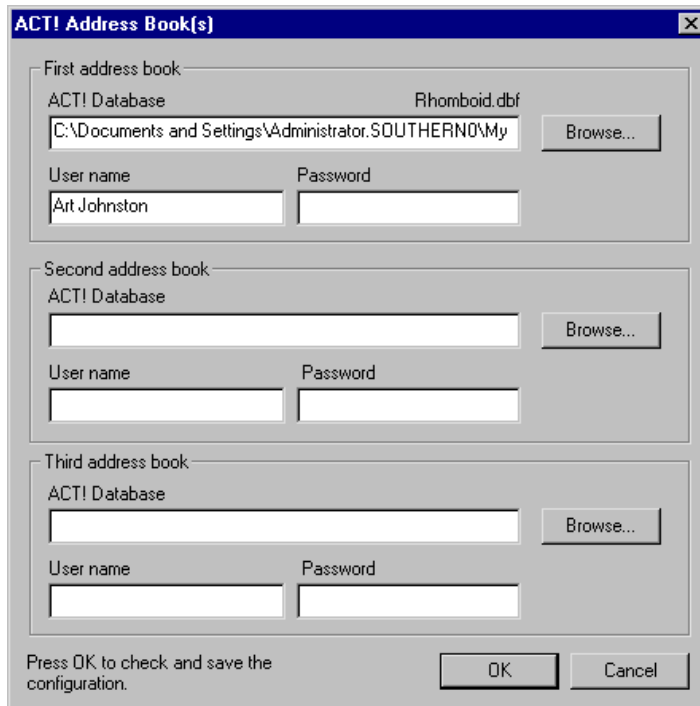
After you set the options on the Microsoft Outlook screen click **Next** to proceed to the Finish screen. If you've set up more than one e-mail system and want to use Outlook as the default, select it as your primary system. Click **Finish** to save your e-mail system configuration and close the wizard.

## **Adding ACT! Address Books To Outlook**

When you open Outlook the first thing you must do to complete the integration is add the ACT! address book to the Outlook address book. Depending on which version of Outlook you're running, 2000 or 2002, the steps will be different.

If you are integrating with Outlook 2000 follow these steps:

1. In Outlook, choose **Tools | Services** from the menu bar to open the Services dialog box.
2. Click the **Add** button to display the Add Service to Profile dialog box.
3. Select **ACT! Address Book** and click **OK** to display the ACT! Address Book(s) dialog box seen in Figure 10-3.
4. Use the **Browse** button(s) to select up to three ACT! databases to add to Outlook.
5. Click **OK** to return to the Services dialog box where you'll now see ACT! Address Book listed. You'll also receive a message that the new service will not be implemented until you close Outlook and restart it.
6. Click **OK** to close the services dialog box and return to the active Outlook window.
7. Choose **File | Exit and Log Off** to close Outlook.
8. Restart Outlook.



**Figure 10-3:** You can use as many as three ACT! databases.

If you are integrating with Outlook 2002 (XP) follow these steps:

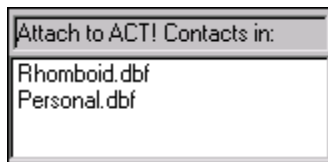
1. In Outlook, choose **Tools | E-mail Accounts** from the menu bar to open the E-mail Accounts dialog box.
2. Select *Add a new directory or address book*, and click **Next**.
3. Select *Additional Address Books* and click **Next**.
4. From the list of address book types choose **ACT! Address Book**.
5. Click **Next** to display the ACT! Address Book(s) dialog box seen in Figure 10-3.
6. Use the **Browse** button(s) to select up to three ACT! databases to add to Outlook.
7. Enter the *User name* and *Password* data if needed.
8. Click **OK** to return to the E-mail Accounts dialog box where you'll now see ACT! Address Book listed. You'll also receive a message that the new service will not be implemented until you close Outlook and restart it.
9. Click **Finish** to close the E-mail Accounts dialog box and return to the active Outlook window.
10. Choose **File | Exit** to close Outlook.
11. Restart Outlook.

Once the ACT! address book(s) are added and Outlook is restarted, you'll find that several changes have been made to Outlook.

## Changes To Outlook

After you add the ACT! address book(s) to Outlook and close and reopen it, you'll find a number of new items in Outlook in addition to the ACT! address book(s).

To begin with, a new button is added to the Standard toolbar. It is the **Attach to ACT! Contact(s)** button, which sports an ACT! Icon. It enables you to attach an Outlook e-mail message to one or more contacts in ACT!. When you click the button, a list of the ACT! databases that you've added to Outlook appears (see Figure 10-4).



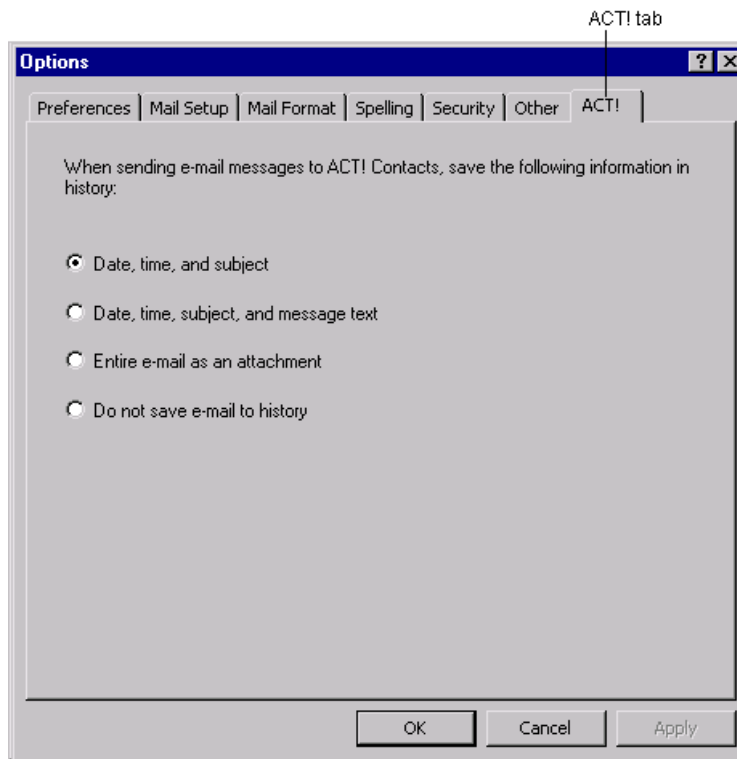
**Figure 10-4:** You can choose any of the ACT! address books you've added to Outlook.

The next new item you'll discover is the Quick Attach to ACT! Contact(s) command on the Tools menu. Like the new toolbar button, the menu command opens the Attach to ACT! Contacts in window (refer to Figure 10-4), from which you can select the database containing the contact(s) to which you want to attach the e-mail.

The third item added to Outlook by the ACT! address book is a new tab on the Outlook Options dialog box. As you can see in Figure 10-5, the new tab is aptly named **ACT!**.

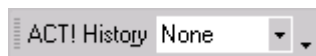
***Note:** The ACT! tab provides a set of options for determining how much information is sent to ACT! when you attach an Outlook e-mail to an ACT! contact. Unfortunately, due to a bug in ACT! 6, the options do not work. No matter which option you select, the date, time, and subject are included in the contact history, along with a shortcut to the e-mail message. With any luck, the bug will be fixed by the time you read this. Check the ACT! web site ([www.act.com](http://www.act.com)) for the latest update.*

The only good thing that can be said of the bug is that it errs on the side of too much information, and not too little. Therefore, when you use the **Attach to ACT! Contact(s)** button or the Quick Attach to ACT! Contact(s) menu item, you will add all the e-mail information to the contact record's history.



**Figure 10-5:** The ACT! tab offers options to control the information saved with e-mail messages you attach to ACT! contacts.

The last component added to Outlook when you incorporate an ACT! address book is the ACT! History toolbar, which is available in the blank (New) e-mail message form. Unfortunately, it does not appear automatically. You must manually display it the first time. From then on it appears in each new message form until you manually hide it. To display the ACT! History toolbar, right-click the Standard toolbar in the message form and select ACT! History from the shortcut menu. To hide the ACT! History toolbar right-click the Standard toolbar and deselect the ACT! History item. As you can see in Figure 10-6, the ACT! History toolbar consists of only one item - a drop down list of options for information to include when attaching the new e-mail to the recipient(s).



**Figure 10-6:** The ACT! History toolbar contains a single button.

As you're composing your new message you can decide exactly how much information (if any) to add the recipient's history. Before sending the message, access the **ACT! History** drop down list and make your choice. As soon as you click the **Send** button, the information you've chosen is attached to the recipient's history tab.

## Composing, Sending And Receiving

After you add the ACT! address book(s) to Outlook you can use either Outlook, or the ACT! e-mail client to compose, send, and receive e-mail messages. For details on performing these operation in the ACT! e-mail client see the section later in this chapter covering those tasks. For details on composing, sending, and receiving e-mail in Outlook, see the Outlook help files.

As noted earlier, the one drawback to using the ACT! e-mail client is that all outgoing messages are placed in the Outlook outbox and can only be sent by performing a send/receive operation from Outlook. If you're on an Exchange Server mail system that handles all outgoing mail, you'll have no problem since Exchange periodically sweeps all outboxes for outgoing mail and sends any messages it finds, automatically. However, if you have to manually send your outgoing e-mail, there is a way around having to switch to Outlook each time you create a message in the ACT! e-mail client - schedule an automatic Outlook send/receive.

In Outlook 2002 (XP) press **Ctrl+Alt+S** or choose Tools | Send/Receive Settings | Define Send/Receive Groups to display the Send/Receive Groups dialog box. Select the group in which the account is included, and check the *Schedule an automatic send/receive every \_ minutes* option in the Online options. Enter the number of minutes between each automatic send/receive operation and click **Close** to return to the Options dialog box. Click **OK** to return to the active Outlook window.

If you have an always on connection such as DSL or cable modem, Outlook 2000 should automatically send e-mail placed in the outbox. If you don't have an always on connection, or if you find messages getting stuck in the outbox you can schedule an automatic send/receive. Choose Tools | Options to open the Options dialog box. Click the **Internet E-mail** tab and place a checkmark in the *Check my local network connection(s) for new mail every \_ minute(s)* option. Configure the time and the additional options that appear if needed.

## Using Outlook Express

To use Outlook Express as an e-mail client with ACT!, you must do two things - set up an e-mail account in Outlook Express; and let ACT! know that you want to use Outlook Express. However, before you decide to use Outlook Express with ACT! you should understand the limitations of this union.

- **Outlook Express folders.** The only folder Outlook Express allows ACT! to access is the Inbox. All other folders are off limits. This means that Outlook Express custom folders are not available in the ACT! e-mail client. It also means that the Outbox, Sent Items, Deleted Items, and Drafts folders in the ACT! e-mail client will not match those in Outlook Express if you perform operations in both clients. For example, if you place a message in the drafts folder in Outlook Express it will not appear in the Drafts folder in the ACT! e-mail client and vice versa.
- **Plain text only messages.** Although Outlook Express supports outgoing HTML messages, all text messages created in the ACT! e-mail client and sent using Outlook Express as the primary e-mail client, are converted to plain text. This includes e-mail messages created during a mail merge. To send HTML messages you must create them in Outlook Express.

- **Return receipts.** Outlook Express doesn't support return receipts on e-mail messages sent using the ACT! e-mail client. This is true even if you're using Outlook Express 6, which does support read receipts on messages sent from Outlook Express. Earlier versions of Outlook Express do not support return receipts at all.
- **POP3 e-mail accounts.** Although Outlook Express supports IMAP and HTTP e-mail accounts, ACT! e-mail does not. Therefore, you will not be able to use an IMAP or HTTP e-mail account you have in Outlook Express when integrating with ACT!.

## Adding An E-Mail Account To Outlook Express

Setting up an e-mail account in Outlook Express is easy:

1. Choose **Tools | Accounts** from the Outlook Express menu bar to open the Internet Accounts dialog box.
2. Click the **Add** button to display a menu of account types.
3. Select **Mail** to launch the Internet Connection Wizard.
4. The first two screens are easy to fill in. Enter your name, as you want it to appear on outgoing messages, click **Next**, and enter your e-mail address on the following screen.

***Note:** Depending on your version of Outlook Express you may also find an option to set up a Hotmail account. However, Outlook Express with ACT! requires a POP3 e-mail account. It will not work with an IMAP or HTTP account such as Hotmail.*

5. Click **Next** to display the E-mail Server Names screen. Here you must enter three pieces of information:
  - **My incoming mail server is a \_ server.** Since ACT! will only work with Outlook Express if you're using a POP3 account, select POP3.
  - **Incoming mail (POP3, IMAP or HTTP) server.** Enter the name of your incoming server. Your Internet Service Provider (ISP) or your administrator should provide this information.
  - **Outgoing mail (SMTP) server.** This is the server that handles the messages you send. Once again, the information should be provided by your ISP or by your administrator.
6. Click **Next** to open the Internet Mail Logon screen, and enter your *Account name* and *Password*. The account name is your user id, not the *Display name* you entered in the first wizard screen. Your ISP or your administrator should supply both the account name and the password.
7. Check the *Remember password* option if you don't want to be bothered typing it in each time you check your mail.

***Caution:** Although turning the Remember password option on makes checking your e-mail easy, it also means that anyone with access to your computer can download your e-mail without your knowledge or consent. Therefore, if you share a computer with other users you may want to deselect this option.*

8. If your ISP or administrator indicates that you must use Secure Password Authentication to access your e-mail account, check the *Log on using Secure Password Authentication (SPA)* option. If you're not sure, leave it unchecked.

9. Click **Next** and then click **Finish** to complete the new e-mail account setup and return to the Internet Accounts dialog box.

If you click the **Mail** tab, you'll find the new account listed there. You'll also note that the account name is actually the incoming mail server name. To change it to something a little more descriptive, highlight the account; click the **Properties** button, and type a new name over the incoming mail server name. When you click **OK** you return to the **Mail** tab of the Internet Accounts dialog box, where you'll find the account listed under its new name.

### **Configuring ACT!**

Once you've got the e-mail account established in Outlook Express, the next step is to let Outlook know about it. The easiest way is to use the E-mail Setup Wizard.

1. Choose **Edit | Preferences** to open the Preferences dialog box.
2. Click the **E-mail** tab to display the e-mail preferences.
3. Click the **E-mail System Setup** button to launch the E-mail Setup Wizard shown in Figure 10-7.
4. Check *Outlook Express* to select it as one of the e-mail clients you want to use with ACT!
5. Click **Next** to proceed. Depending on your selection(s) on the opening E-mail Setup Screen, you'll either go through the Internet Mail and/or Outlook setup screens, or just head right for the Finish screen (if you select Outlook Express only).
6. Complete the set up for all other e-mail systems you selected.
7. When you arrive at the Finish screen, click **Finish** to return to the Preferences dialog box.



**Figure 10-7:** Select Outlook Express as one of the e-mail systems to use.

8. If you set up other e-mail systems (Internet Mail and/or Outlook), select Outlook Express from the *Send e-mail to contacts using* drop down list, to make Outlook Express your primary ACT! e-mail client.
9. Click **OK** to close the Preferences dialog box and return to the active window.

The next time you open the ACT! e-mail client you'll find a set of Outlook Express folders has been added to the ACT! Mailbox.

***Tip:** If you're using Outlook Express 6, each time you attempt to send an e-mail message you may get an error message indicating that another program is trying to send a message on your behalf. Click **Send** to override this security feature of Outlook Express 6. If you click **Do Not Send**, the message is deleted. The error message may not be visible, so if you find the ACT! e-mail client is no longer responding, press **Alt+Tab** to see if an error message is lurking somewhere in the background. To disable this feature, open Outlook Express and choose **Tools / Options**, then click the **Security** tab. Deselect the **Warn me when other applications try to send mail as me** option.*

## Composing, Sending And Receiving In Outlook Express

After you configure ACT! to use Outlook Express, you can use either Outlook Express, or the ACT! e-mail client to compose, send, and receive e-mail messages. For details on performing these operation in the ACT! e-mail client see the section later in this chapter covering those tasks. For details on composing, sending, and receiving e-mail in Outlook Express, see the Outlook Express help files.

## Creating An Outlook Express Address Book From Your ACT! Database

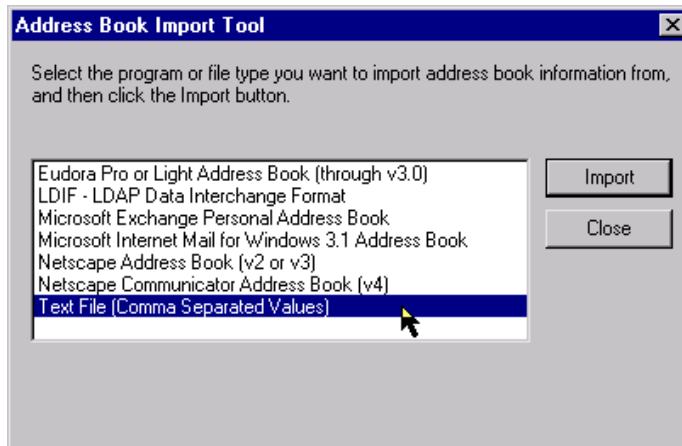
Although you can't simply add your ACT! database to Outlook Express the way can to Microsoft Outlook, there is a procedure for exporting your database from ACT! and importing it into Outlook Express that offers the same functionality.

Here's what you do:

1. Open ACT! and choose **File | Data Exchange | Export** from the menu bar to launch the Export Wizard.

**Tip:** *If you want to export only a selected number of records create a lookup before launching the Export Wizard.*

2. Select **Text - Delimited** from the *File type* drop down list, and then enter the name and path of the export file you want to create. Use the browse button at the end of the field to locate the folder in which you want to save the file.
3. Type a name in the *File name* field and select **Text - Delimited (\*.csv)** from the *Save as type* drop down list. Then click **Save**.
4. Click **Next** and choose *Contact records only*.
5. Click the **Options** button, select *Comma* as the field separator, and check the *Yes export field names* option.
6. Click **OK** to return to the wizard.
7. Click **Next** and indicate whether you want to export the current record, the current lookup or all records.
8. Click **Next** to select the fields you want to include in the export, and the order in which you want them exported.
9. Click **Finish** to complete the export process.
10. Open Outlook Express and choose **File | Import | Other Address Book** from the menu bar to display the Address Book Import Tool dialog box shown in Figure 10-8.
11. Select **Text File (Comma Separated Values)** and click **Import** to start the CSV Import wizard.
12. Click the **Browse** button to display the Open dialog box.
13. Locate the .csv file you created with your ACT! export, select it, and click **Open** to return to the CSV Import wizard.
14. Click **Next** to view the field mapping screen. Outlook Express automatically maps those fields it recognizes. However, there are a number of fields you'll probably want to include that Outlook Express does not recognize, such as business addresses and phone numbers. Double-click the ACT! field (on the left) you want to map and select the corresponding Outlook Express field from the drop down list. Then check the *Import this field* option.



**Figure 10-8:** Outlook Express imports a variety of address book types

15. Click **OK** to return to the CSV Import wizard, and repeat the process for each field you want to map.
16. Click **Finish** to complete the import.

The next time you open your Outlook Express address book you'll find all the imported contacts from ACT!.

## Troubleshooting ACT!/Outlook Express E-Mail Problems

Due to the limitations inherent in the ACT!/Outlook Express integration, there are a few things that may crop up while using either e-mail client.

### Custom Folders

Since the Inbox is the only folder truly shared between Outlook Express and the ACT! e-mail client, moving a message from the ACT! e-mail client Inbox to another folder causes the message to be moved to the Deleted Items folder in Outlook Express. Moving messages from the Outlook Express Inbox to a different folder deletes the message permanently (the next time you perform a send/receive in ACT!) from the ACT! Inbox, bypassing the Deleted Items folder entirely. To restore them, return to Outlook Express, move the messages from the custom folder back to the Inbox, then return to the ACT! e-mail client and perform a send/receive. If you want to maintain a duplicate (and synchronized) set of custom folders in both Outlook Express and the ACT! e-mail client you will have to move the messages manually.

## Messages Appear In ACT! Sent Items Folder But Remain In Outlook Express Outbox

If you turn off the *Send messages immediately* option in Outlook Express, all messages you compose and send from the ACT! e-mail client will appear to have been sent, but will actually be waiting in the Outlook Express Outbox. The reason they are moved to the Sent Items folder in ACT! is that they have been “sent” to Outlook Express. You’ll either have to send them manually from Outlook Express or enable the *Send messages immediately* option in Outlook Express by choosing Tools | Options, opening the **Send** tab and placing a checkmark next to Send messages immediately.

## Alternate Reply Address Ignored

If you designate an alternate address for replies in your Outlook Express account setup, it is stripped out of messages you send from the ACT! e-mail client. Therefore, when recipients reply to your e-mail, your primary e-mail address is always used. The only way around this is to disable the *Send messages immediately* option in Outlook Express (see previous section) and send the messages from Outlook Express.

## Setting Up Eudora

For those of you who were bemoaning the lack of support for Eudora in the initial release of ACT! 6, there is finally some relief. In version ACT! 6.0.3, Eudora support has resurfaced. There are, however, a couple of drawbacks that make the integration less functional than Eudora fans would like. The first is the fact that although Eudora supports HTML messages, the MAPI protocol used to integrate ACT! and Eudora does not. Therefore, any message you create directly from within ACT! is placed in the Eudora Outbox as plain text. The problem carries over to the mail merge feature, which creates a plain text message with a copy of the message in HTML format as an attachment.

In addition, Eudora does not work with HTTP e-mail accounts such as Hotmail. There’s one more thing. ACT! 6.0.3 (or higher) only supports Eudora 5.2 or higher. Therefore, all those Eudora fans who are still using 5.1 or earlier will have to upgrade to take advantage of the new ACT! 6/Eudora integration.

## Configuring ACT! to Use Eudora

As with the other e-mail clients, setting up Eudora is done through the E-mail Setup Wizard. Choose Edit | Preferences and click the E-mail tab on the Preferences dialog box. Then click E-mail System Setup button to launch the E-mail Setup Wizard. Select Eudora from the list of available e-mail clients and click Next to display the Eudora configuration settings shown in Figure 10-9.

**Note:** Before you the Eudora configuration settings appear, a dialog box pops up and warns you that some Eudora features will not be available. The limitations it refers to are described at the beginning of this section.



**Figure 10-9:** Configuring Eudora is a breeze

As you can see, there are two options along with two buttons that perform specific actions.

- **Personality.** The concept behind this option is great - the ability to choose the default personality in Eudora to be used for sending e-mail from within ACT!. Unfortunately, it is non-functional. The setting is not retained upon closing the Preferences dialog box, and the Dominant personality is always used.
- **Signature for outgoing mail.** This feature enables you to select a default signature to use with Eudora. Select your preference from the drop down list.
- **Edit Signatures.** Click this button to display the Signatures dialog box in which you can not only edit existing signatures, but also create new ones, and remove those you no longer need.
- **Launch Eudora.** If you want to get started with Eudora right away, click this button to launch the application.

Click **Next** to display the Finish screen, **Finish** to close the Wizard, and you're done. It doesn't get much easier.

## Using Eudora with ACT!

The first thing to note is that you must have both the ACT! e-mail client and Eudora open to send e-mail from ACT!. However, you don't have to manually open both (unless you open Eudora first), since launching the ACT! e-mail client automatically launches Eudora.

The only noticeable change produced by the ACT!/Eudora integration is the addition of the Eudora Folder in the ACT! e-mail client. Upon first glance, it appears that along with Eudora's Inbox, the Deleted Items, Drafts, Outbox, and Sent Items mailboxes are all added to the new folder. There's only one problem - Eudora doesn't have a Deleted Items mailbox, a Drafts mailbox or a Sent Items mailbox. Other than the Inbox, these are all ACT! e-mail client folders, not Eudora mailboxes. Although Eudora does possess an Outbox, the one that appears in the ACT! e-mail client has no connection with the Eudora Outbox. Consequently, any attempt to move mail between the folders in one client (ACT! or Eudora) will not be reflected in the other.

## Composing and Sending E-mail

After you configure Eudora as an ACT! e-mail system, you can use either Eudora, or the ACT! e-mail client to compose, send, and receive e-mail messages. For details on performing these operation in the ACT! e-mail client see the section later in this chapter covering those tasks. For details on composing, sending, and receiving e-mail in Eudora, see the Eudora help files.

There are a couple of minor quirks you should be aware of when using the ACT! e-mail client to send and receive messages. First, you'll find that messages appear to be sent (they're moved to the Sent Items folder) as soon as you click the **Send** button in the message form. However, unless you have Eudora configured to send mail immediately, all messages are stored in the Eudora Outbox. Therefore, you must click the **Send/Receive** button in the ACT! e-mail client (or the **Check Mail** button in Eudora) to actually send the messages.

*Tip: You can force Eudora to send messages immediately (including those sent from the ACT! e-mail client), by opening the Options dialog box (Tools / Options) in Eudora, clicking the **Sending Mail** icon, and enabling the Immediate Send option.*

The other anomaly is that although clicking the **Send/Receive** button in the ACT! e-mail client causes Eudora to download incoming mail, those messages do not appear in the Eudora folder Inbox in ACT! unless you click the **Send/Receive** button a second time.

## Troubleshooting ACT! 6/Eudora Integration Problems

For those of us who are dyed in the wool Eudora fans it's good to have Eudora integration back (in ACT! 6.0.3 and higher). Unfortunately, there are a number of issues that can arise when using Eudora with ACT! 6. The good news is that, armed with a little knowledge, you may be able to avoid or overcome most of the obstacles that appear.

### Received Messages Fail to Appear in the ACT! Inbox

There are two possible causes for this problem:

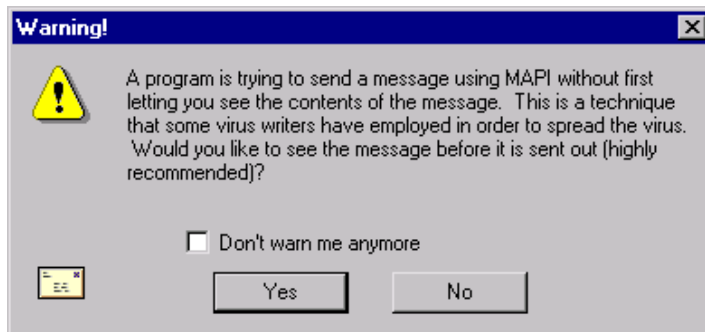
**ACT! e-mail client refresh.** Although this issue was covered in the last section it bears repeating since it's so common, potentially frustrating, and easily resolved. Due to the manner in which the ACT! 6/Eudora integration works, downloading e-mail from the ACT! e-mail client frequently appears not to work. The problem is not that the e-mail isn't downloaded, but rather that it doesn't immediately appear in the Eudora Inbox in ACT!. All you have to do to remedy the situation is click the **Send/Receive** button a second time in the ACT! e-mail client.

**Eudora automation.** Unless the *Automation enabled from this machine* option is enabled in Eudora, ACT! will not be allowed to send a download command to Eudora. To enable the setting, open Eudora and choose Tools | Options to display the Options dialog box. Select the **Automation** icon from the Category list and check the *Automation enabled from this machine* option.

## ACT! E-mail Freezes

During a Send/Receive operation initiated in ACT!, you may find that the ACT! e-mail client stops responding. The most common cause of this problem is that Eudora has displayed a dialog box that requires user input such as a password or user id. Unfortunately, the dialog box is displayed in the background making it appear that the ACT! e-mail client has locked up. Simply click the **Eudora** icon on the Windows taskbar to display the dialog box.

In addition to a request for a password or user id, there is another type of dialog box that may appear in the background. This is a MAPI security feature in Eudora that warns you when another program attempts to send a message from Eudora (see Figure 10-10).



**Figure 10-10:** Eudora is keeping a watchful eye on other programs

You must click **Yes** to continue with the Send operation. To turn the warning off, check the *Don't warn me anymore* option before clicking **Yes**. If you decide you want to turn the warning on again, open the Options dialog box in Eudora (Tools | Options), and click the **MAPI** icon in the Category list to display the MAPI options. Select the *Warn on MAPI auto-send of messages* option.

## MAPI Errors

If you encounter MAPI32.DLL error messages while running ACT! or other programs, it may be the result of Eudora renaming the mapi32.dll file to eumapi.dll. The easiest way to fix this problem is to run the fixmapi.exe utility that comes with Internet Explorer 5.0 and higher. Use the Windows Search feature to locate the fixmapi.exe file. Then double-click the file to run it. Although nothing appears to happen, the appropriate mapi32.dll file is restored.

## Outlook Errors

If you have both Outlook and Eudora installed, and you select Eudora as the e-mail system to use with ACT!, you may encounter a variety of error messages upon opening Outlook. Most of the messages indicate that the problem can be resolved by running the Detect and Repair Utility in Outlook (Help | Detect and Repair). Unfortunately, running Detect and Repair does not resolve the problem.

To correct this problem, open the Eudora Options dialog box (Tools | Options), click the **MAPI** icon, and select **Never** for the *Use Eudora MAPI server* option.

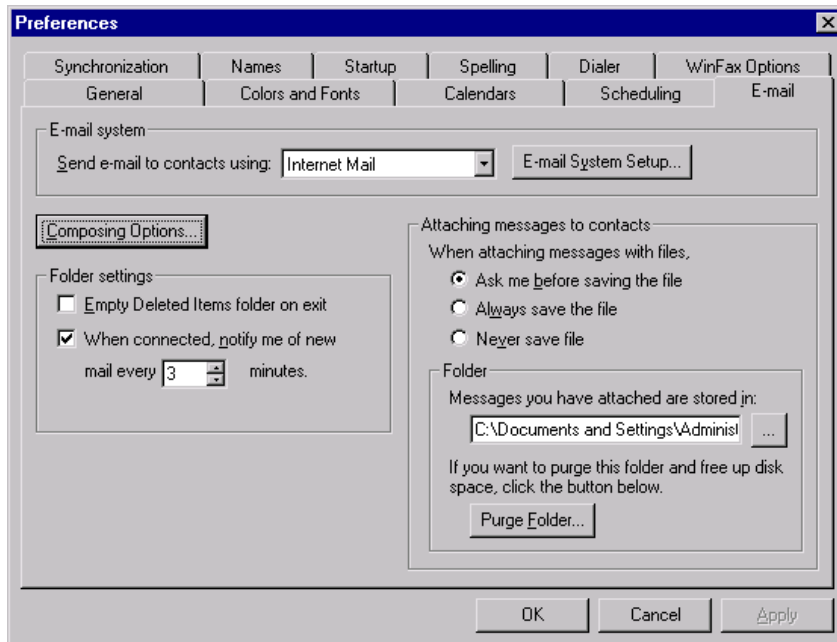
## Configuring ACT! E-mail Preferences

After you decide on your e-mail system and set it up, it's time to configure your e-mail preferences. The ACT! e-mail preferences enable you to customize the manner in which a number of e-mail features work, including e-mail notification, the handling of e-mail attachments, signatures, and more.

***Note:** The e-mail preferences were changed significantly in ACT! 6.0.3. Therefore, if you're running an earlier version of ACT! 6, some of the information and screen shots contained in this section will differ from what you see in your e-mail preferences. To check your version, choose **Help | About ACT!** from the menu bar. To obtain the latest update visit the ACT! website: <http://www.act.com>.*

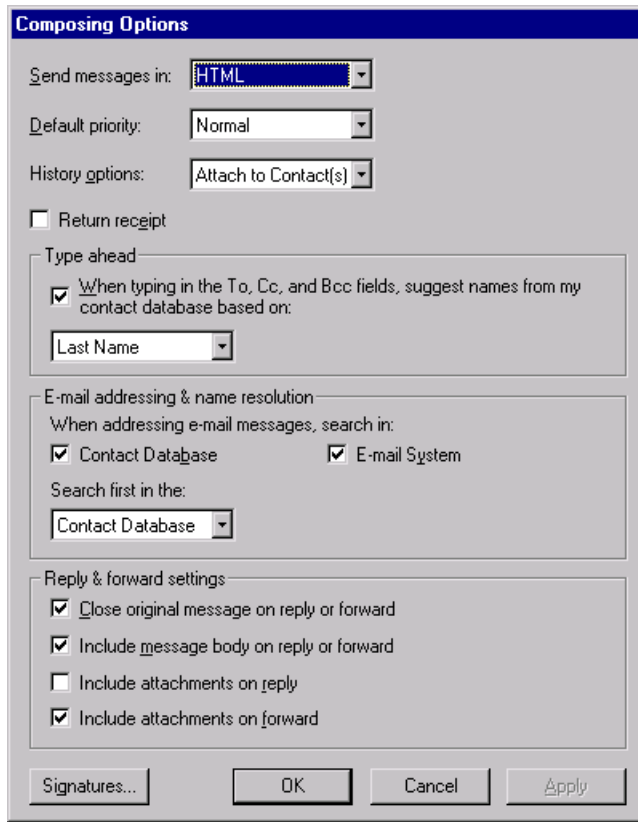
Setting your e-mail preferences is easy if you follow these steps:

1. Choose **Edit | Preferences** from the menu bar to open the Preferences dialog box, then click the **E-mail** tab to view the e-mail options shown in Figure 10-11.



**Figure 10-11:** Configure ACT! e-mail to suit your needs

2. If you configured multiple e-mail systems, use the *Send e-mail to contacts using* drop down list to designate which program you want to use as your primary e-mail system. This is the one that will be used to send all e-mail messages from ACT!. If you want to change your e-mail system setup, click the **E-mail System Setup** button to start the E-mail Setup Wizard.
3. Click the **Composing Options** button to open the Composing Options dialog box seen in Figure 10-12.
4. Set the composing options, which include:
  - **New message settings**
    - **Send messages in.** Select the default format for all outgoing e-mail messages. Choosing HTML enables you to modify the formatting of text in the message body, and to include active hyperlinks. However, only Internet Mail and Microsoft Outlook support HTML messages with ACT!. If you choose HTML and your primary e-mail system is Outlook Express, Eudora, or Lotus Notes, your message will be converted to plain text.
    - **Default priority.** Choose the priority status of all outgoing messages. Regardless of the status you designate here, you can always change the priority of individual messages before sending them. A word of caution about using a default priority status other than Normal - like the boy who cried wolf, senders whose e-mail is always marked urgent will eventually be ignored. It's best to leave the priority at Normal and only use High for those individual messages that truly deserve it.



**Figure 10-12:** Tailor the way outgoing messages, replies, and forwards are handled.

- **History options.** Use this option to determine how much history information is stored each time you send an e-mail message. One thing to be aware of with the history options is that they only apply to messages sent directly from the ACT! e-mail client, regardless of which e-mail system is designated as the default.
  - **None.** Selecting this option results in no information being recorded in the contact's history.
  - **Subject only.** This records the date, time, type, record manager, and subject line from the e-mail message.
  - **Subject + Message.** This option records all the information included with the *Subject only* option, and adds the body of the message to the Regarding field.
  - **Attach to Contact(s).** If you want instant access to the original e-mail, this is the option to choose. It includes all the information recorded in the *Subject only* option, and adds the message to the contact record as an attachment.

- **Return receipt.** If you want to be sure your recipient actually opens your e-mail you can request a return receipt. Turning this option on ensures that every message you send from within the ACT! e-mail client includes a return receipt request. It may be tempting to use this option, but there are a couple of things to consider. One, not all e-mail clients support return receipts, and two, many people consider it an annoyance and an invasion of privacy. The other thing to keep in mind is that the receiver has the option to ignore or override your request.

- **When typing in the To, Cc, and Bcc fields, suggest names from my contact database based on.** This option enables the type ahead feature that automatically searches for matches as you type in the recipient fields (To, Cc, Bcc). Check the option to turn the feature on. Then from the drop down list that follows, select the field on which to base the type ahead feature.

- **E-mail addressing & name resolution settings.** The idea is simple. Check *Contact Database* to have ACT! look for To, Cc, or Bcc entries in the ACT! Contact database, or check *E-mail System* to have it search the primary e-mail client address book. Then by selecting one of the two from the *Search first in the* drop down list, you can determine which source is examined first. Unfortunately, these settings appear to be non-functioning in version 6.0.3.

- Reply & Forward settings

- **Close original message on reply or forward.** With this option selected, the ACT! e-mail client closes the original message as soon as you create a reply or forward message.

- **Include message body on reply or forward.** If you want to retain the original message body when you reply or forward a message, check this option. The header and the body text are included.

- **Include attachments on reply.** There is probably little reason to use this option, which retains any attachments included with the original message, when you reply. Since the sender obviously has the attachment, and other recipients received the attachment, it is almost guaranteed to be an unnecessary gesture that will only take up bandwidth and disk space.

- **Include attachments on forward.** Now, this is a little different. When forwarding a message with an attachment, you may very well want to include the attachment. If so, check this option.

- **Signatures.** Click this button to display the Signatures dialog box, where you can enter the text you want to close each e-mail message with. Click the **New** button to start a new signature. Next, highlight the new entry in the Signatures window and click the **Rename** button. Give the new signature a unique name and press the **Enter** key. Now, move to the Edit Signature window at the bottom of the dialog box and add the text you want to use as your signature. Repeat the process to create as many signatures as you need. Then click **OK** to close the Signatures dialog box.

**Note:** Unfortunately, the signature is only added to messages that you create from within the ACT! e-mail client. If you use the **Write E-mail** button or **Write | E-mail Message** command, the signature is not added. To include the signature on all outgoing messages you must add it to the default message template, *emailbody.gmt* (see Chapter 12 for details on modifying e-mail templates). You can include links and e-mail addresses in your signature as long as you're using Internet Mail or Microsoft Outlook, the only two clients that support HTML messages when used with ACT!. If you're sending messages in Plain Text, the links will appear as text, and will not be active.

5. Click **OK** to save your changes and return to the **E-mail** tab of the Preferences dialog box.
6. Set the *Folder settings* options, which include:
  - **Empty Deleted Items folder on exit.** If you want to keep your Deleted Items folder from becoming bloated you may want to enable this option, which permanently deletes all messages stored in the Deleted Items folder each time you exit the ACT! e-mail client.
  - **When connected, notify me of new mail every \_ minutes.** The name of this option is rather misleading. While it does display a small mail icon in the Windows system tray when new mail arrives, the real purpose of this option is to configure the ACT! e-mail client to perform an automatic send/receive operation at regular intervals. Set the number of minutes you want ACT! to wait between send/receive operations. Other than the new mail icon in the system tray, there is no visual or audio notification.
7. Set the *Attaching messages to contacts* options:
  - **When attaching messages with files.** If you receive e-mail messages with files attached you can choose to attach to the message to a contact record with or without the file. Keep in mind that the files become part of the ACT! database and increase its size. To decide on a case-by-case basis, choose *Ask me before saving the file*. If you always want the file saved along with the message, choose *Always save the file*. If you don't want to clutter up your ACT! database with extra files choose *Never save file*.
  - **Messages you have attached are stored in.** This is the path to the parent e-mail folder in which messages you attach to a contact record are stored. By default ACT! creates an E-mail folder with subfolders for each e-mail client you configure to work with ACT!, and a Temporary Attachment folder with subfolders for each e-mail client, in which file attachments you save are stored. You can click the browse button at the end of the field to change the folder in which you want attached messages stored.

- **Purge Folder.** If your ACT! database is growing too large you might consider deleting some or all of the attached messages to improve performance. Click the **Purge Folder** button to display the Purge Folder dialog box, which offers you the opportunity to remove all messages or only those created prior to a date that you supply. It does not affect messages in your mailboxes or folders, nor does it affect files that you've included when attaching messages to contact records. One thing to keep in mind is that the history item still indicates that the message is attached. However, when you try to open the attached message you're informed that it can't be found.

8. Click **OK** to save your changes and return to the active ACT! window.

Although this is the bulk of the e-mail preferences there are still a couple of other settings you can modify that will affect the ACT! e-mail client.

- **Font settings.** You can change the font settings for both the e-mail window and for messages you create and send. Choose **Edit | Preferences** to open the Preferences dialog box, then click the **Colors and Fonts** tab to view the formatting options. From the *Customize* list on the left select **E-mail View** to change the font used for folder names and e-mail message entries in the ACT! e-mail client. To modify the font used in new e-mail messages you create in the ACT! e-mail client, select **E-mail Compose** from the *Customize* list. After you make your selection, click the **Font** button to change the font, font size, or font style. To change the font color, click the **Text color** drop down arrow and choose a color from the palette that appears. To change the background color, click the **Background color** drop down arrow and select a color from the palette. Click **OK** to save your changes and return to the active ACT! window.

- **E-mail folders.** From the **General** tab of the Preferences dialog box (**Edit | Preferences**) you can designate the default folders to be used for your e-mail system(s) and for e-mails you attach to contact records. In the *Default locations* section, choose **Attached E-mail** or **E-mail** from the *File type* drop down list. In the *Location field*, enter the path for, or **Browse to**, the folder in which you want to store the selected e-mail type.

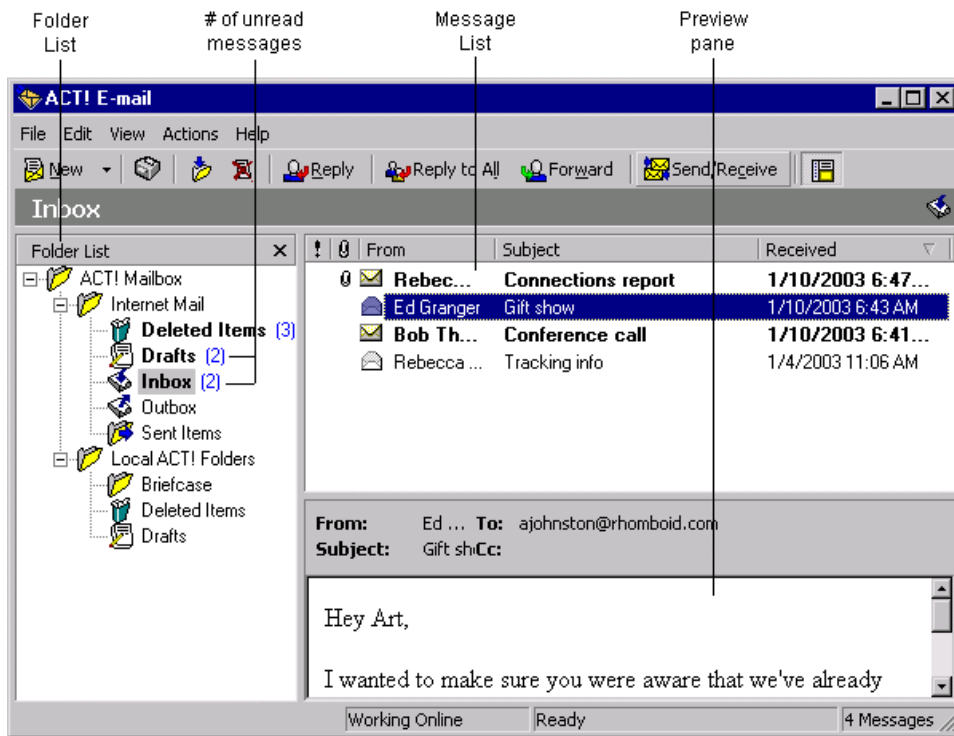
Remember, all the e-mail preferences you set within ACT!, work only on the ACT! e-mail client, and not on any other e-mail client you may be integrating with ACT! such as Microsoft Outlook, Outlook Express, Eudora, or Lotus Notes. Most of the changes take effect immediately, even if you have the ACT! e-mail client open. If you notice a change has not been effected, close the ACT! e-mail client and reopen it.

## Using The ACT! E-mail Client

Regardless of whether you integrate another e-mail client with ACT! or use the ACT! client alone, you will be spending a large part of your emailing time in the ACT! client. Therefore, the remainder of this chapter deals with sending, receiving, and organizing e-mail using the e-mail client that comes with ACT!.

## Navigating The ACT! E-Mail Window

Before embarking on the mechanics of sending and receiving e-mail, it will help to take a quick tour of the ACT! e-mail client shown in Figure 10-13.



**Figure 10-13:** The ACT! e-mail client is easy to get around in.

As you can see in Figure 10-13, the ACT! e-mail client consists of three separate panes:

- **Folder List.** By default, the Folder list contains two sets of parent folders, one for the client you've selected, and Local ACT! Folders. Regardless of which client you use, you will always have five basic folders.
  - **Deleted Items.** Any messages you delete from other folders are temporarily stored here. You can restore messages you delete by moving them from the Deleted Items folder to any their original folder. You can permanently delete messages from the Deleted Items folder by deleting them individually or by right clicking the Deleted Items folder and selecting Empty 'Deleted Items' Folder from the shortcut menu.
  - **Drafts.** Use the Drafts folder to store unfinished e-mail messages by pressing **Ctrl+S** in the e-mail message or click the **Save** button on the message Standard toolbar. When you're ready to finish the message, move to the Drafts folder, open the message, add your finishing touches, and click **Send**.
  - **Inbox.** This is where all your incoming mail is stored. From here you can move or copy it to other folders, or delete it. See the section later in this chapter on organizing your e-mail.

- **Outbox.** Outgoing mail may be temporarily stored in the Outbox depending on your e-mail system. If you send an e-mail, but aren't connected, the e-mail is stored in the Outbox until you establish your connection. If you're on an Exchange server, the e-mail remains in the Outbox until Exchange makes its next sweep.
- **Sent Items.** It's always a good idea to keep a copy of messages you send, and ACT! takes the work out of it by automatically saving a copy of all outgoing mail in the Sent Items folder.
- **Message list.** This is the top right pane of the ACT! e-mail window, in which the contents of the selected folder are displayed.
- **Preview pane.** When you select a message in the message list, the header and body information appear in the preview pane, which is the pane directly below the message list.

*Note: In version 6.0.3 or later, you can access the ACT! Preferences dialog box from the ACT! e-mail client. It makes changing e-mail settings especially easy since the Preferences dialog box opens directly to the E-mail tab when accessed from the e-mail client. To open the Preferences dialog box from the ACT! e-mail client, choose **Edit | Preferences** from the menu bar.*

## Modifying the Message List Pane

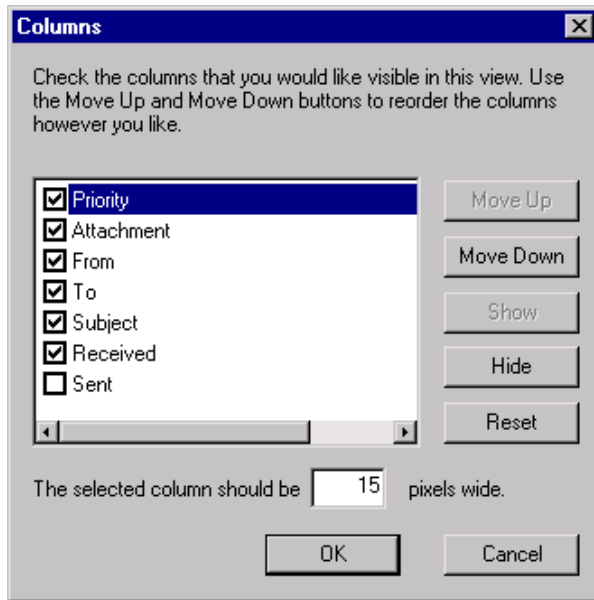
Starting with version 6.0.3, you can choose the columns you want displayed in the message pane. Also new in 6.0.3 is the ability to modify column widths and positions from a dialog box. As with earlier versions, you can still change column positions and width using the drag and drop method in the message list pane.

To add or remove a column from the view, choose **View | Columns** from the menu bar to open the Columns dialog box shown in Figure 10-14.

To hide columns from view, remove the checkmark next to the column name, or select the column and click the **Hide** button. To display a column in the view, check the box next to the name, or select the column and click the **Show** button. You can change the column position in the view by selecting the column and clicking the **Move Up** button (moves the column to the left in the view), or the **Move Down** button (moves it to the right). If, after modifying the columns, you change your mind, simply click the **Reset** button to restore the original settings.

To change the column width, select the column and modify the number of *pixels wide* in the last option in the dialog box. You may have to experiment a little to come up with the right number.

An easier way to change the column position and width is to use your mouse in the message list pane. To reposition a column all you have to is drag the header to a different position and drop it. To change the column width, simply drag the right border of the column header to the left to reduce the column size, or right to increase it.



**Figure 10-14:** Adding and removing columns only hides them from view.

## Sharing Internet Mail Folders

Although ACT! creates the e-mail folders for Internet Mail on the user's local machine by default, you can set up shared folders on the server if you have a shared contact database and want to ensure that all users' e-mail gets backed up every night. However, due to a bug in ACT! 6 you can't simply point all users to a single shared e-mail folder. You must create an Email folder on the server with a subfolder for each user. Next, move each user's Internet Mail folder along with its subfolders from the local machine to the user's folder on the server. Finally, open the Preferences dialog box (Edit | Preferences) and set the *Default Locations* option for E-mail to point to the user's folder on the server.

**Tip:** When accessing a shared folder on a network, Interact recommends using a mapped drive to the folder rather than a UNC (Universal Naming Convention) path. See the Windows help file (Start | Help) for details on creating mapped drives. However, mapped drives can significantly impact the speed of the data transfer. If you find this to be the case you might want to switch from mapped drives to UNC paths.

For example if BillyBob Roberts is one of your users, create an Email folder on the server with a subfolder named BillyBob. Then move BillyBob's Internet Mail folder from his local computer to the Email\BillyBob folder. To complete the process, choose Edit | Preferences to open the Preferences dialog box. On the **General** tab, select E-mail from the *File type* drop down list and set the *Location* to point to the Email\BillyBob folder.

*For more on sharing an ACT! contact database on a network see Appendix B.*

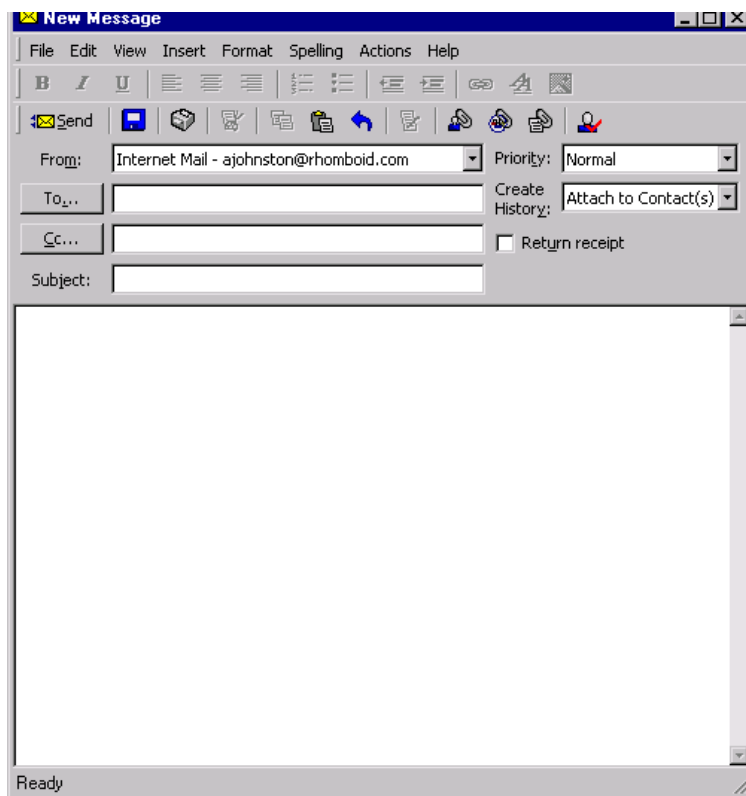
## Composing And Sending E-Mail

ACT! makes composing an e-mail easy no matter where you are. However, the results vary depending on the where and how you create the new message. The basic e-mail message form as seen in Figure 10-15, remains the same, but the recipients and signature do not.

**Note:** If you've upgraded from ACT! 5.04 (or ACT! 2000, build 5.04) to ACT! 6 you may receive an error indicating your Internet Mail e-mail address could not be validated when you attempt to compose a new message in the ACT! e-mail client. The problem is that the My e-mail address field in the Internet Mail form of the E-mail Setup Wizard is blank. Choose **Edit | Preferences | E-mail tab | E-mail System Setup** button, to launch the E-mail Setup Wizard. Move to the Internet Mail screen and reenter your e-mail address in the My e-mail address field.

Follow these steps to create and send an e-mail messages in the ACT! e-mail client:

1. Open a new e-mail message form (see Figure 10-15) using one of the following methods:



**Figure 10-15:** The basic e-mail message form.

- **From an ACT! window.** If you click the **Write E-mail** button in the Contacts window, choose **E-mail Message** from the Write menu, or right-click and select **Write | E-mail Message** in any ACT! window, a blank message form opens with the currently selected contact (unless it's your My Record) as the recipient. As handy as this is, it has one drawback. If you've created a signature that you want to appear on all outgoing e-mail messages, it is missing from messages created using these methods.

- **From the Contact List window.** Choose **Write | E-mail Message** from the ACT! menu bar, or right-click a contact and select **Write | E-mail Message** from the shortcut menu. The added benefit to using the command in the Contacts List window is that you can select multiple recipients all at the same time. In addition, if you select multiple recipients, your signature does appear in the message. If you select only a single recipient, it does not.

- **From the ACT! e-mail client.** After you launch the ACT! e-mail client you can open a blank message form by clicking the **New Mail Message** button, pressing **Ctrl+N**, or choosing **File | New | Mail Message** from the menu bar. No matter with method you use, your signature is attached. However, since the e-mail client is a separate program from ACT!, it is unable to determine the active contact record, and leaves the recipient fields blank.

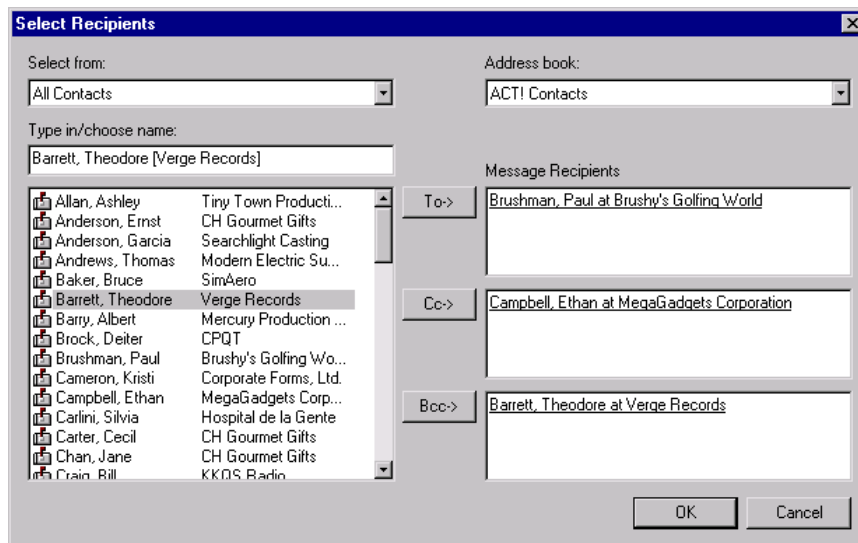
2. After you open a new e-mail message the next step is to fill in the header information, which includes the following fields:

- **To, Cc, Bcc.** If you created the message from any ACT! window other than the e-mail client, there will be at least one recipient in the To field. To add more, either enter e-mail addresses directly into any of the recipient fields or click the **To** button to display the Select Recipients dialog box shown in Figure 10-16. Here you can select from all contacts in the database, those in the current lookup, or any existing groups in the database. Make your choice from the *Select from* drop down list. Then select the contact(s) or group(s) you want to add as recipients and click the **To**, **Cc**, or **Bcc** button. The *To* field is for primary recipients. *Cc*, which stands for carbon copy, provides a copy of the message to interested parties other than the primary recipient(s). *Bcc* or blind carbon copy also provides a copy to non-primary recipients. The difference is that a Bcc recipient's address is hidden from all other recipients. It comes in handy for keeping someone in the loop without letting the other recipient(s) know about it. When you're finished, click **OK** to return to the e-mail message form, where you'll find the recipients have been added in the appropriate fields.

*Note: If you open a message in the Sent Items folder that had one or more Bcc recipients, you'll find that the Bcc recipients have disappeared from the message header. This is a bug. The Bcc copies were sent, but the addresses are removed from the header of the copy saved to the Sent Items folder.*

- **Priority.** Your selection of Low, Normal, or High alerts the recipient(s) to the urgency (or lack of urgency) of your message. The default for the *Priority* field is set in the Composing Options of the ACT! E-mail Preferences (**Edit | Preferences | E-mail tab | Composing Options** button). Make sure you don't overuse the High priority status or no one will pay much attention to your messages.

- **Create History.** This is another field for which the default is set in the Composing Options section of E-mail Preferences. You can choose to have nothing recorded in the recipients' history, only the subject, the subject and the message body, or have the message added as an attachment.
- **Return receipt.** If you'd like to be notified when your recipient opens your message check this option. Like *Priority* and *Create History*, the default for this field is also set in the Composing Options section of the E-mail Preferences. Be advised that not all e-mail clients support return receipts, and not all recipients permit return receipts to be generated. Therefore, you may or may not receive confirmation that a message has been opened.
- **Subject.** While the purpose of the subject line is self evident - a brief description of the contents of the message - its value is often underestimated. Most of us are inundated with e-mail these days, which means we have to make quick judgments about which messages we're going to open, and which we're going to let languish in the Inbox. A poor subject line will frequently cause your message to be overlooked, ignored, or even deleted. A concise and informative word or phrase, on the other hand, will vastly improve the chances that your message will be attended to immediately. In other words, don't write "Quick question" when you need directions to the meeting site. Enter "Need meeting directions" instead. The more information your subject line imparts (without going overboard), the more likely you'll get a quick response

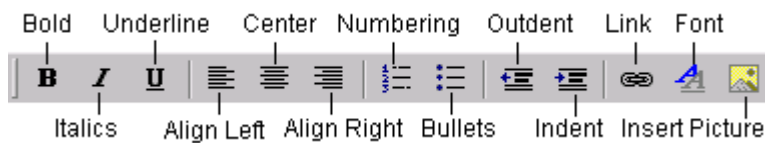


**Figure 10-16:** You can select contacts or groups as e-mail recipients.

3. The next task is to enter the message text.
4. If you want to change the message format from the default, choose **Format** from the menu bar to display the format menu, and select either **HTML** or **Plain Text**.

***Note:** The benefit to using HTML as your message format is the ability to format the message text, include hyperlinks, and add graphics. The downside is that not all e-mail clients handle HTML messages equally well. If you use Plain Text as your message format, you can be sure all your recipients will get your message exactly as you send it. By default, the ACT! e-mail message format is set to HTML. You can change the default setting by changing the Send messages in option in the Composing Options dialog box (Edit | Preferences | E-mail tab | Composing Options button).*

5. If the e-mail message you're sending is an HTML message you can format the message body using the ACT! e-mail client formatting features, many of which can be accessed from the Formatting toolbar in the message form (see Figure 10-17).

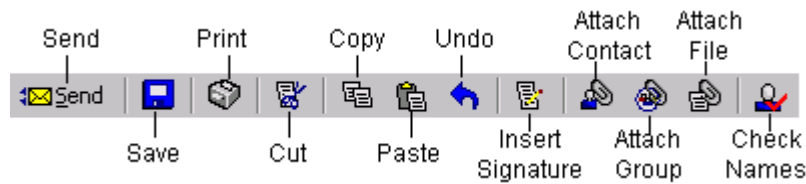


**Figure 10-17:** For quick access to formatting features use the Formatting toolbar.

- **Font formatting.** In addition to being able to change the font itself, you change the font size, style, and color as well. Highlight the text you want to modify and click the **Font** button on the Formatting toolbar to display the Font dialog box, then apply the desired formatting. You can also choose **Format | Font** from the message form menu bar to display the Font dialog box. In addition you can apply bold, italic, and underlining by highlighting the text and clicking the appropriate button on the Formatting toolbar (**B**, **I**, **U**, respectively).
- **Text Highlighting.** If you want to emphasize a portion of text you can add a highlight color. Select the text to highlight, choose **Format | Back Color** from the menu bar, and select the desired color from the color palette that appears.
- **Paragraph formatting.** In addition to formatting the font, you can also apply paragraph formatting, which aligns and indents the message text. Place your cursor in the paragraph you want to format and click the appropriate Formatting toolbar button. The alignment buttons include **Align Left**, **Center**, and **Align Right**. To indent the paragraph click the **Indent** button. To reduce the indent click the **Outdent** button. One word of caution about paragraph formatting.

***Note:** Before applying paragraph formatting, it's important to understand how the ACT! e-mail client defines a paragraph. As far as the e-mail client is concerned, anything between two hard returns is a paragraph. A hard return is an invisible formatting character that's embedded in the document every time you press the **Enter** key while composing the message body. Consequently, a paragraph can be a blank line, a single character, a word, a sentence, or even an entire novel, as long as it resides between two hard returns. This also means that if you use a soft return (**Shift+Enter**) to create a new line, it will still be part of the preceding paragraph in spite of the fact that it appears visually to be a new paragraph.*

- **Styles.** Styles are combinations of font and paragraph formatting created for ease of use and consistency. You can apply styles to different paragraphs and always be sure the font and paragraph formatting will always be the same. In addition, it takes most of the work out of the process by enabling you to select a single style rather than change the font, font size, font style, font color, alignment, and indentation, one at a time. To apply a style to your message, place the cursor in the paragraph you want to format, and choose **Format | Style** to display the styles menu. Then select the style you want applied to the paragraph.
  - **Lists.** Both numbered and bulleted lists are essential for presenting information in a clear and concise manner. To include either in a message, enter your list items, highlight them, and then click the appropriate Formatting toolbar button (**Numbering** or **Bullets**). Be sure to separate each list item with a hard return (press **Enter**).
  - **Graphics.** You can add graphics to dress up your e-mail or to provide visual clarification. To do so, place your cursor where you want the image located and click the **Insert Picture** button on the Formatting toolbar. When the Picture dialog box opens, click the **Browse** button to locate the picture file you want to insert. You can add *Alternate Text* (text that displays when your recipient(s) hover the mouse over the picture), set the alignment, add a border around the picture, and determine the distance between the picture and the surrounding text by setting the *Horizontal* and *Vertical* spacing. To edit a picture's properties, select the image and click the **Insert Picture** button.
  - **Links.** The ability to add hyperlinks to HTML messages can come in very handy. Whether you want to include e-mail addresses, web site URLs, or FTP sites, the process is the same, and it's easy. Select the text or the image you want to use as the link. In the case of text, it can be the actual address or it can be any text of your choosing. For example, you could enter **http://www.bobswonderfulwebsite.net** or **Bob's web site** and make either one a hyperlink to Bob's site. After you highlight the text or image, click the **Hyperlink** button on the Formatting toolbar or choose **Insert | Hyperlink** from the menu bar. Either method displays the Hyperlink dialog box. Select the link type from the *Type* drop down list, and enter the actual address in the *URL* field.
6. If you created a signature, you can add it to the message by clicking the **Insert Signature** button on the standard toolbar (see Figure 10-18). Be sure to place your cursor where you want the signature to appear before clicking the button. Also, remember, in a Plain Text message, any links you may have in your signature will appear as text only.



**Figure 10-18:** Use the message form's Standard toolbar to perform common tasks.

7. Press **F7** or choose **Spelling | Check Document** from the message form menu bar to spell check the message body. You can also spell check of the message body by selecting the text to check and pressing **Shift+F7**. The spell checker highlights and stops at any words it does not find in the dictionary used for the spell check. You can replace, skip, or add (to the dictionary) any misspelled words it finds. Keep in mind that a misspelled word is simply one that is not found in the dictionary.

8. Add any attachments you want to include with the message by clicking the appropriate Standard toolbar button.

- **Attach Contact.** Click the **Attach Contact** button to open the Attach Contact(s) dialog box. Make the appropriate choice in the *Select contacts from* option, and choose the contact(s) you want to attach. Next, designate the format you want to use for attaching the contacts. If your recipients are all ACT! users you can select the ACT! contact format. If you're not sure, or you're sending to a mix you can either send the contacts in the Internet standard format or in both formats. Finally, indicate the additional information you want to include (Notes/History, Sales, Activities).

- **Attach group.** Since there is no Internet standard format for ACT! groups, this option is only valid if you're sending the group to other ACT! users. When you click the **Attach Group** button, the Attach Group(s) dialog box opens. Select the group(s) to attach and indicate whether you want to include the Notes/History, and/or Activities for each group selected.

- **Attach File.** To add a document, image, or any other type of computer file click this button. The Insert File Attachment dialog box opens. It is a standard Windows "Open" dialog box that you can use to locate the file from your hard disk or from other computers on the network. You can also attach files by dragging them from Windows Explorer into the message and dropping them.

9. Click the **Send** button to transmit the message. What happens next depends on your connection. If you're connected, ACT! sends the message immediately. If you're using a dial up connection, but are not connected, the dial up connection dialog box appears asking you to confirm the user name and password. As soon as you click **Dial** and the connection is made, your e-mail is sent. If you opt not to connect by canceling the dialog box, the message is placed in the Outbox until the next time you connect and perform a send/receive. If you're on an Exchange server or other inter-company e-mail system that periodically sweeps for mail, the message is placed in your Outbox until the next sweep.

***Tip:** When you cancel a dial up connection or try to send e-mail when not connected, ACT! immediately switches to the **Work Offline** mode. Unfortunately, it does not emulate most other e-mail clients, which ignore the **Work Offline** status and automatically check for a connection when you click the **Send** button or the **Send/Receive** button. Once you've cancelled a connection, you must revert back to **Work Online** mode, which can be accomplished by opening the **File** menu in the ACT! e-mail window and deselecting **Work Offline**.*

## Receiving And Replying To E-Mail

Getting e-mail requires almost no effort on your part. As a matter of fact, if you automate the process, it takes no work at all. However, dealing with all that incoming e-mail does require some work. Dealing with it efficiently and effectively takes a little knowledge and a lot of organization.

***Tip:** To automate the send/receive process choose **Edit | Preferences | E-mail** tab to display the e-mail options. Check the **When connected, notify me of new mail every \_ minutes**, and enter the number of minutes you want ACT! to wait between performing automatic send/receive operations. Although the option name implies this is for notification, it is really for automating the process.*

To receive e-mail you must establish your connection, either to the Internet or your network. After that, Click the **Send/Receive** button and the mail will start flowing in (as long as someone is sending it, of course). If you're on an Exchange server or other networked e-mail system, e-mail will be distributed to your mailbox automatically.

## Opening Incoming E-Mail

Once you get your incoming mail there are a number of things you can do with it. You'll probably want to read it. You may want to reply to it, or forward it to someone else. If it has an attachment you can open it, save it to your hard disk, ignore it, or delete it. Finally you'll probably want to store the message or delete it when you're through with it.

## Reading Messages

Incoming e-mail messages are automatically deposited in your **Inbox**, which you can open by clicking the **Inbox** icon in the Folder List. The message information for each new message appears in bold in the message list to the right. The quickest way to open a message is to double-click it. That's all there is to it. Once you've read it you can close it by pressing **Alt+F4**.

By default, the ACT! e-mail client also displays the preview pane in the bottom right portion of the window. When you select a message from the message list (no need to open the message), the header information and message body appear in the preview pane. You can hide and show the preview pane by clicking the **Toggle Preview Pane** button on the toolbar.

## Responding To Messages

Very often an incoming message requires (or deserves) a response. When you find such an e-mail, simply click the **Reply** button to create a new message addressed to the sender. You can either open the message and click the **Reply** button in the message form, or select the message in the message list and click the **Reply** button in the ACT! e-mail client. You can also right-click the message and select **Reply** from the shortcut menu. If the original message was sent to multiple recipients you can send the same reply to each of them by using the **Reply to All** button.

By default ACT! includes the original message in your reply. To change that setting or other Reply and Forward options see the section earlier in this chapter on Configuring E-mail Preferences. ACT! also includes the original subject line preceded by RE:.

If the original message was an HTML message, or if you change the format to HTML by choosing **Format | HTML** from the message form menu bar, you can use ACT!'s formatting features to apply font and paragraph formatting to your reply.

## Forwarding Messages

Occasionally you probably receive e-mail that would be of interest to a third party. When that happens you can pass it along by using the ACT! e-mail client's **Forward** command. With the message open or selected in the message list click the **Forward** button. As with the reply commands, **Forward** opens a new message that includes the same subject line (preceded by FW:), message body, and attachment(s) as the original message.

For more information on changing forwarding options, see the previous section in this chapter entitled Configuring ACT! e-mail preferences.

## Marking Messages Read/Unread

Beginning with ACT! 6.0.3, you can mark unread messages as Read, or read messages as Unread. As soon as you select or open a message it loses the bolding that is applied to unopened messages. The ability to mark those messages as Unread comes in handy when you don't have time to deal with the message after you've opened it. By marking it Unread, the bolding is reapplied, making it stand out the next time you open the folder in which it's stored.

To mark a message, select it and choose **Edit | Mark as Read (or Unread)**. You can also right-click the message and select **Mark as Read (or Unread)** from the shortcut menu.

## Handling Incoming Attachments

When you receive a message with an attachment you have a couple of options for dealing with the attachment. If it's an ACT! contact or group you can add it to your contact database by double-clicking the attachment. If it's file and you have the software application associated with that file type installed on your computer, you should be able to open it by double-clicking it. For example, if you double click a Word document (a file with a .doc extension) attachment Word starts and opens the attached document.

**Warning:** *Unless you have a good antivirus program installed, running, and updated with the most recent virus definitions, you should be wary of opening file attachments, even those from people you recognize. Some viruses are capable of entering an unprotected computer and sending e-mail messages with infected attachments using the address book of the e-mail client found on the infected computer. This can all be done without the computer user ever being aware of it.*

If double-clicking doesn't work, you'll have to save the attachment to your hard disk, start the associated program, and then open the file from within the associated program.

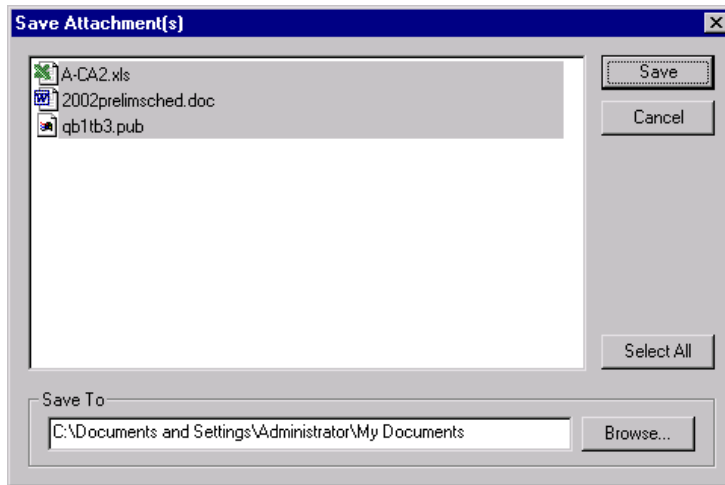
To save an attachment to your hard disk:

1. Open the e-mail that contains the attachment you want to save.
2. Right click the attached file and select **Save As** from the shortcut menu to open the Save Attachments dialog box.
3. Locate the folder in which you want to save the file and click the **Save** button.

If the message has multiple attachments that you want to save in the same folder, right-click any of the attachments and select **Save All** from the shortcut menu to open the Save Attachment(s) dialog box shown in Figure 10-19.

You can also access the Save Attachment(s) dialog box by right clicking a message (with attachments) in the message list and selecting **Save Attachments** from the shortcut menu.

In addition to opening or saving the attachment you can also print or delete it. To print an attachment, open the message, right-click the attachment you want to print, and select **Print** from the shortcut menu. To delete an attachment, select it and click the **Delete** button on the Standard toolbar or press the **Delete** key.



**Figure 10-19:** Save one or more attachments to the same folder.

## Printing Messages

As convenient as electronic information is to use and store, there are times when nothing less than hard copy will do. Therefore, when you need or want a printed copy of an e-mail message it's yours for the asking. You can get it with a couple of mouse clicks (as long as you have a printer installed):

1. Open the appropriate folder and highlight the message you want to print.
2. Click the **Print** button on the Standard toolbar, or choose **File | Print**, to open the Print dialog box.
3. If you have more than one printer installed, select the printer you want to use.
4. Set the remaining print options and click **Print**.

You can also right-click a message in the message list and select **Print** from the shortcut menu to open the Print dialog box. If the message is open, click the **Print** button on the message form toolbar.

## Sorting E-Mail

If you store a lot of e-mail in your Inbox or other folders you may find it easier to locate a particular message by changing the sort order of the folder. Occasionally I find myself looking for something that I know came from a certain person, but I can't remember the date or the subject, so I resort the folder by the **From** column, and then find that person's name so I can review everything she sent.

To reorganize your e-mail by changing the sort order:

1. Open the folder you want to sort.
2. Click the header of the column you want to sort the folder by. An engraved down arrow indicates that sort is descending (from A to Z), an engraved up arrow indicates the sort is ascending (from Z to A).

3. Click the column header a second time to change the sort from ascending to descending or vice versa.

You can also right-click a column header and select **Sort Ascending** or **Sort Descending** from the shortcut menu.

## Organizing E-Mail

Receiving, reading, and responding to e-mail are only half the battle. Once you've attended to it, you have to decide whether to keep it for future reference or delete it to reduce the clutter. If you're going to delete it, simply click the **Delete** button on the toolbar. However, if you're going to save it, you have a couple of choices. You can attach the e-mail to one or more contacts, and/or, you can store it in one of the ACT! Mailbox folders.

### Attaching E-Mail Messages To ACT! Contacts And Groups

While you can automate the attachment of outgoing messages to ACT! contact records, you must manually attach incoming messages. Although the manual procedure outlined in the following steps is used mainly for incoming messages, it can be used for any message residing in one of your mailbox folders. For example, if you've set the *History options* (Edit | Preferences | **E-mail** tab | **Composing Options** button) to **None**, **Subject only**, or **Subject + Message**, outgoing e-mails will not be attached automatically. So, if you decide you want a particular outgoing message attached, you can open the Sent Items folder and use the following procedure to attach it to an ACT! contact record.

1. If the message is open, choose **Actions | Attach to Contact** to open the **Attach E-mail to Contact** dialog box.

***Tip:** You can attach multiple messages to the same contact(s), by highlighting the messages in the message list, right-clicking one of them, and selecting **Attach to Contact** from the shortcut menu to open the **Attach E-mail to Contact** dialog box.*

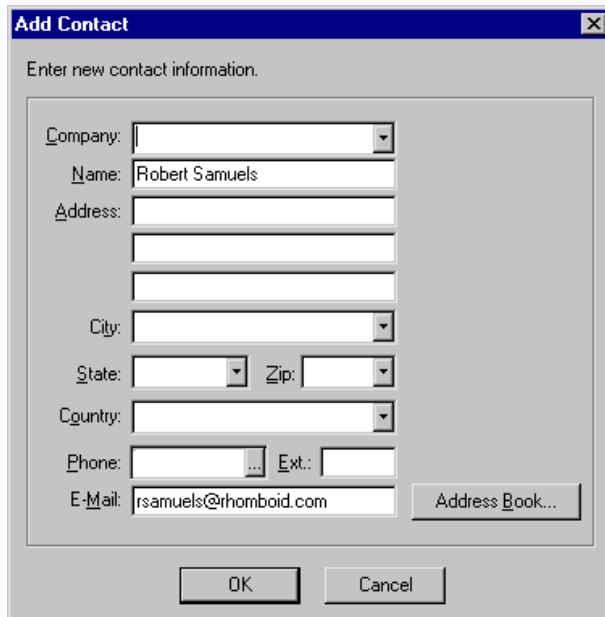
2. Use the *Select contact from* option to determine from which group of contacts you want to choose.
3. From the list of contacts that appears, select the contact(s) to which you want the e-mail messages attached.
4. Click the **Add** button to include the contact(s) in the *Attach to these contacts* list.
5. Click **OK** to attach the messages and return to the ACT! e-mail window.

You can also attach e-mail messages to group records. The process is basically the same as attaching messages to contact records. Select the message(s), right-click and choose **Attach to Group** to open the **Attach E-mail to Group** dialog box. Select the group(s) to which you want the message(s) attached and click **Add**. When you're done, click **OK** to complete the process.

## Creating Contacts from Messages

If you're like me, you frequently receive e-mail from someone who is not in your contacts database, but should be. The ACT! e-mail client makes it a simple task to add both the sender and any of the additional recipients of the message to your contacts database with a couple of mouse clicks.

To create a contact from the message sender, right-click the message and select **Create Contact from Sender** from the shortcut menu. This opens the Add Contact dialog box seen in Figure 10-20.



**Figure 10-20:** Adding contacts on the fly is easy.

Fill in as much (or as little) information as needed and click OK to save the new contact.

In addition to adding the sender, you can also add any recipients appearing in the To, Cc, or Bcc lines. To do so, open the e-mail message, right-click the recipient, and select **Add to Contacts** from the shortcut menu. The Add Contacts dialog box opens, enabling you to enter additional contact information if necessary.

## Creating an Activity from an E-mail Message

New in version 6.0.3 is the ability to automatically create an activity from an existing e-mail message. All you have to do is right-click the message and select **Create Activity from Message** from the shortcut menu. A new Schedule Activity dialog box opens, with the following information added:

- **Activity type.** Meeting.

- **Date.** The message date (either Received or Sent, depending the message type).
- **Time.** The message time.
- **Regarding.** The message Subject line.
- **Details.** The message body.

Complete the form, making the necessary changes, and click **OK** to save it.

## Storing E-Mail In ACT! E-Mail Folders

By default, the ACT! e-mail client offers two sets of folders when you use Internet Mail - Internet Mail folders, and Local ACT! Folders. The Internet Mail folders include the basic e-mail folders - Inbox, Outbox, Sent Items, Drafts, and Deleted Items. The Local ACT! Folders include a Briefcase folder, as well as a Deleted Items and a Drafts folder. Since Internet Mail folders are stored on your local machine, both sets of folders are actually “local”. Therefore, the ACT! Local Folders are of most interest and use to someone using a different e-mail client such as Outlook, in conjunction with a mail system like Exchange Server that stores e-mail folders on a network server.

The beauty of using ACT! folders, whether the Internet Mail folders or the Local ACT! Folders is that you can create a filing system to organize the e-mail message you save in exactly the manner the best suits your purposes. It’s a simple matter of creating additional folders for the different categories of e-mail you plan to store, and moving incoming and/or sent messages into them. For example, you may want to create a folder for e-mail from customers, and another for e-mail from vendors. It will make it a lot easier to locate if you only have to search through those e-mails that are relevant to your search.

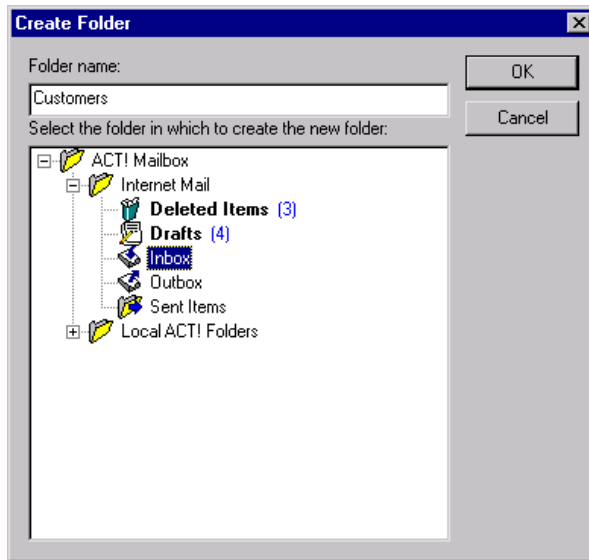
## Creating New Folders

When you begin using the ACT! e-mail client you start with a barebones framework of folders that takes care of the basic tasks and nothing more. Just as with your paper correspondence, you’ll want to retain copies of important e-mail messages. And like your hardcopy correspondence, you’ll find it much easier to retrieve if you file it in a separate, clearly labeled location with other related messages. Therefore, the first order of business is to create some new folders to handle your stored e-mail.

Before we move on to the procedure of creating folders there’s one other thing to be aware of. Any new folder you create must be a subfolder of an existing folder. Starting at the top level, that means you can create a new folder on the same level as Internet Mail and Local ACT! Folders, but no higher. You can also create subfolders under any of the existing folders below those levels.

To create a new folder follow these steps:

1. Press **Ctrl+Shift+E** or choose File | New | Folder to open the Create Folder dialog box shown in Figure 10-21.



**Figure 10-21:** Add a new folder to any existing folder.

2. In the *Folder name* field, enter a label for the new folder.
3. From the list of folders, select the existing folder in which to create the new folder. If you want it to be at the same level as the two primary folders (Internet Mail and Local ACT! Folders) select ACT! Mailbox.

***Tip:** When you create new folders save yourself time and aggravation by planning a logical hierarchy before you start. For example, if you're creating folders to hold incoming e-mail, put them under the Inbox. If you're going to keep track of vendor e-mail and you receive a lot, you may want to create separate folders for each vendor under a Vendor folder in the Inbox. If you get a lot of personal mail at work, you'll probably want to create a Personal folder. You might even want to create two separate, top-level folders, one for Business, and the other for Personal.*

4. Click **OK** to add the new folder and return to the ACT! e-mail client.

You can also create new folders by right-clicking an existing folder and selecting **New Folder** from the shortcut menu to open the Create Folder dialog box. The folder you right clicked is already selected in the folder list. Now all you have to do is enter a name and click **OK**.

## Moving Folders

Even if you plan your folder hierarchy logically, there will still be times when you need to rearrange your folders. When that happens, all you have to do drag them from the original location and drop them in a new spot. However, as your folder list grows, it may be easier to use the move command. All you have to do is right-click the folder you want to move and select **Move To Folder** from the shortcut menu to open the Move Items dialog box. Select the folder into which you want to move the original folder and click **OK**.

If you decide, in the middle of the move, that what you really need is a new folder into which to move the existing one, you can create one by clicking the **New Folder** button. This opens the Create Folder dialog box. Follow the steps outlined earlier for creating new folders.

## Deleting Folders

When you no longer need a folder there's no point in keeping it around to clutter things up. Getting rid of an unwanted folder is actually pretty simple. Highlight the straggler in the folder list and press the **Delete** key or click the **Delete** button. The folder, its contents, and any subfolders are instantly deleted. Actually, that's not quite true. They're moved to the Deleted Items folder and will be deleted the next time you empty it. If you change your mind about the deletion, just open the Deleted Items folder and restore the items.

You can also delete folders by dragging them to the Deleted Items folder in the Folder List, or by right clicking them and selecting **Delete** from the shortcut menu.

