

# How to set up MailManager4Act

In order to use MailManager4Act, a custom field and dropdown menu must be created. This operation can only be performed on the machine hosting the database.

If you are hosting the Act! database on your own machine, please install MailManager4Act on your computer and proceed to the **Permission Field Setup** section below. If your Act! database is hosted on a different computer such as a server, or shared PC, then you will need to perform the Permission Field Setup on a machine that has direct access to this server. If your database is hosted by a third party hosting company and you are using a remote database, please contact your hosting provider so they can assist you with the initial set up. Once the steps in the Permission Field Setup section have been performed, you may move on to the Configuration section below.

**Note:** Please create a backup of your database prior to beginning with the initial setup section. If you previously had MailMerge4Act, or OptinManager installed, please uninstall them prior to the install in order to avoid any conflict issues.

## Permission Field Setup

- Install MailManager4Act on a workstation machine that has direct access to the server hosting the database.
- After logging in to Act!, you will be presented with the MailManager4Act activation window. Enter your license key and click the Add button to add your Act user to the licensed users list. Otherwise, simply close this window to continue in trial mode.
- Click the menu **MailManager4Act > MailManager4Act Settings**
- You can either create a new permission field by clicking the **Create Permission Field** button, or if you already have a character field in the database that you have used previously to record Contact permissions, select this existing field from the **Field Name** dropdown menu. In the Value field, type in the value that MailManager4Act will use to ignore Contacts from email blast. If you clicked the Create Permission Field button, by default this value will be “Denied”

the content on the Opt-In page visible to your Contacts.

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**Contact exclusion**

Please select a field in your database which will be used to exclude Contacts. If the field contains the value entered below, the Contact will not be included in the mail merge. If you do not have such a field, click the Create Permission Field button to create a new field.

Field Name

Value

[Create Permission Field](#)

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Optin Management Sync Settings

- Once the field is created, please add the "Contact Permission" field to your Contact layout. To learn more about adding fields to your layout, please refer to the following article: [Article ID: 1011](#)
- This concludes the schema set up portion of this guide. If you have remote database users in your environment, please instruct them to synchronize their remote database. Once that is completed, they may continue with the section below since the field will be created for them during the synchronization.

## OptinManagement Account Configuration

- Click the menu **MailManager4Act > MailManager4Act Settings**
- Click the **Create Account** link in order to create an account on optinmanagement.com.

**MailManager4Act**

Opt-in Management | Email Server Settings | History Settings | Email Footer Settings | Email Delivery

**Opt-In Management Account Settings**

Username  [Validate](#)

Password

Account ID:

[Create Account](#) [Customize Opt-In Page](#)

You can retrieve your username, password, and account ID by registering for an optinmanagement.com account. To register for an account, click the "Create Account" link. Once an account is created, you may click the "Customize Opt-In page" link above to customize the the content on the Opt-In page visible to your Contacts.

- Once the account is created and confirmed, enter the **Username** and **Password** in the fields above.
- In order to retrieve the **Account ID**, click the **Customize Opt-In Page** link above, which should launch your webbrowser to [optinmanagement.com](http://optinmanagement.com). Log in again if required.
- Click the **Copy** button on the web page.
- While on the Customize web page, enter in your **Company Name**, **website URL**, and upload a **Logo** for your company. If you are uploading a logo, please remember to hit the **Upload** button or else the logo may not be saved correctly. Your current logo will be displayed under the **Preview** label.
- You may also enter some text in the **Message Text** field which will be displayed to your users when they click the link in the emails sent via the **Optin Management** menu in Act, which will be discussed in more detail below.

- Once completed, click the **Save** button on this web page to save your settings.

## Optin Manager Page Settings.

Account ID	000000-1-7320-0000-9990-000000000000
	<div>Copy</div>
Company Name	Untitled Company
URL	www.domain.com
Logo	<div>Choose File No file chosen</div> <div>Upload</div>
	<b>Preview:</b> <div>4</div>
Message Text	<div>Please use the following buttons to confirm or deny e-mail communication with you.</div>
	<div>Save</div>

- After copying the Account ID from the web page above, paste this ID in the **Account ID** field in Act.
- Click the **Validate** link in order to check your credentials and Account ID.

## Email Server Settings

- Click the **Email Server Settings** tab and enter your Email server settings. MailManager4Act requires an SMTP connection in order to send emails to the Contacts. If you are unsure of these settings, please consult with your Email Administrator and they will be able to provide you with these connection settings. If you are using a popular 3rd party email provider such as Office365 or Gmail, you can do a web search and find these SMTP settings easily. For example, see the following article for Office365 based email accounts: <https://support.office.com/en-us/article/how-to-set-up-a-multifunction-device-or-application-to-send-email-using-office-365-69f58e99-c550-4274-ad18-c805d654b4c4>

The screenshot shows the MailManager4Act application window with the 'Email Server Settings' tab selected. The 'SMTP' sub-tab is also active. The 'Display Name' is 'John Smith' and the 'Email Address' is 'johnsmith@domain.com'. The 'Record emails sent in your "Sent" Folder.' checkbox is unchecked. The 'Email Settings Preset' dropdown is empty. The 'Server Address' is 'mail.domain.com', 'Username' is 'johnsmith@domain.com', 'Password' is masked with dots, 'Port' is 25, 'Encryption' is set to 'Off', and '# of Connections' is 1. A 'Test Connection' button is next to the 'Server Address' field. 'Save' and 'Delete' buttons are at the bottom right of the main settings area, and 'Save' and 'Cancel' buttons are at the bottom right of the dialog.

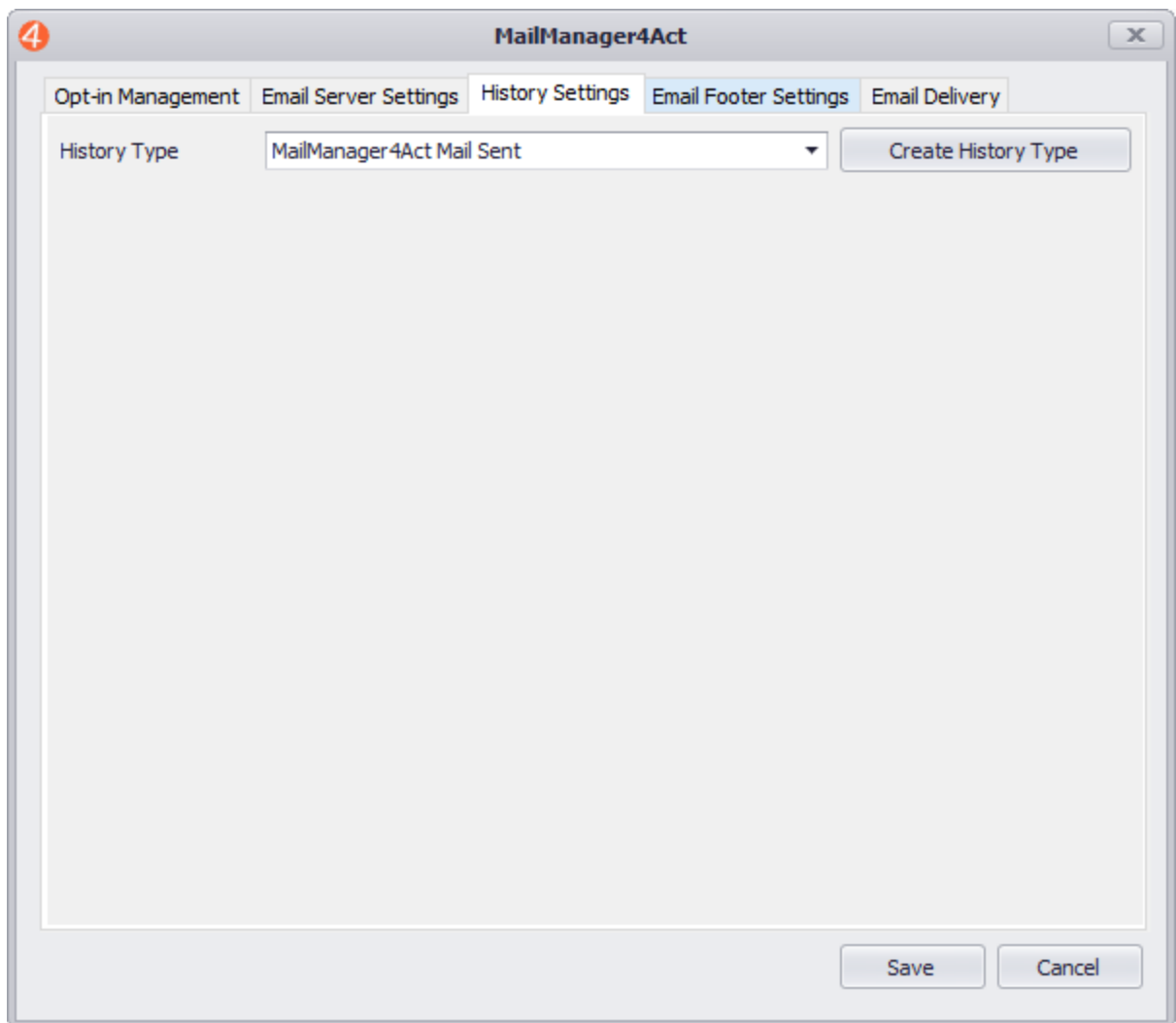
MailManager4Act	
Opt-in Management   <b>Email Server Settings</b>   History Settings   Email Footer Settings   Email Delivery	
Display Name	John Smith
Email Address	johnsmith@domain.com
<input type="checkbox"/> Record emails sent in your "Sent" Folder.	
Email Settings Preset	[Dropdown]
[Save] [Delete]	
SMTP   IMAP	
Server Address	mail.domain.com
Username	johnsmith@domain.com
Password	.....
Port	25
Encryption	<input checked="" type="radio"/> Off <input type="radio"/> SSL <input type="radio"/> TLS
# of Connections	1
[Test Connection]	
[Save] [Cancel]	

- If you wish to record the emails sent by MailManager4Act in the Sent folder of your email account, enable the **Record emails sent in your "Sent" Folder** checkbox and enter in your IMAP server information in the **IMAP** tab as well since the SMTP service alone does not have access to your account's IMAP folders. Keep in mind that enabling

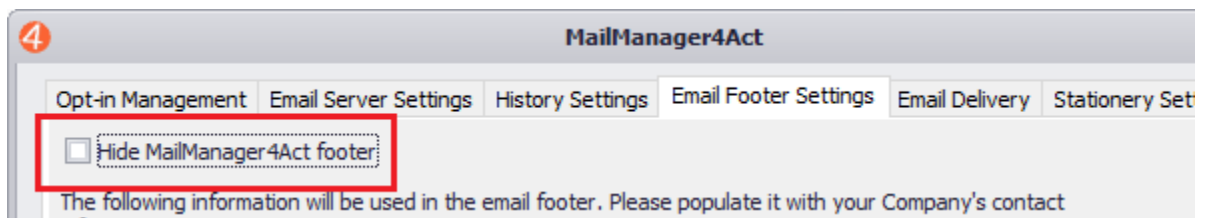
this option will increase the time it takes to send each email and increase the size of your mailbox over time therefore we only recommend enabling this option only if needed.

## Email History Settings

- Click the **Create History Type** to create a custom history type in your database that will be used to record email messages to the history tab. We highly recommend using a custom history type rather than the generic “Email Sent” as doing this will make filtering by history type very easy later on if you ever wish to do database cleanup or auditing. If you wish to use another history type, select it from the **History Type** dropdown menu.



- Click the **Email Footer Settings** tab.
- If you would not like MailManager4Act to generate an email footer with an unsubscribe link, enable the **Hide MailManager4Act footer** checkbox.



- Enter your company's contact information in the fields provided. This text will be used to generate the footer of the email blasts.

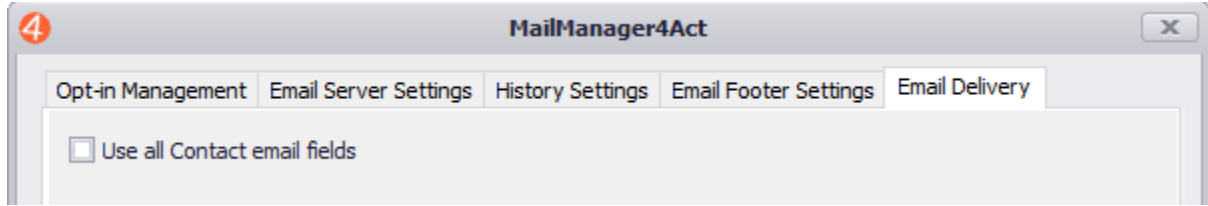
The following information will be used in the email footer. Please populate it with your Company's contact information

Name	<input type="text" value="John Smith"/>
Company	<input type="text" value="ACME Inc."/>
Phone	<input type="text" value="123-456-7890"/>
Address	<input type="text" value="123 Anywhere ST, Toronto, ON A1B3C4"/>

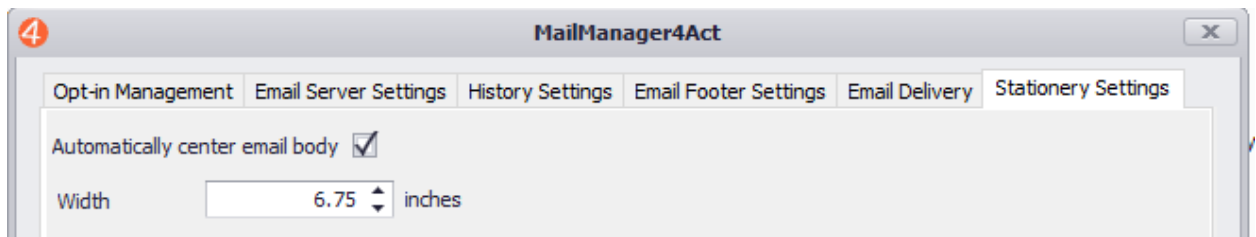
Save Cancel

- If you wish MailManager4Act to use all Contact email fields when sending out email blasts, click the **Email Delivery** tab and enable the **Use all Contact email fields** checkbox. This will make sure that when a Contact is sent an email, they will receive it on not only their main email, but also on any other recorded email addresses in the database, such as Alternate Email, Personal Email, etc. However, for most scenarios, we

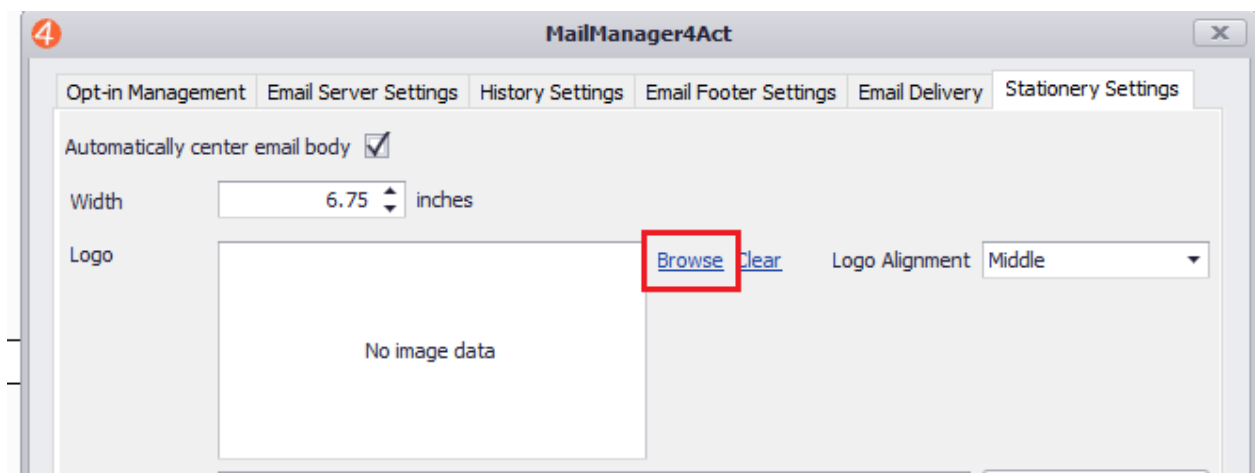
recommend leaving this option disabled.



- Click the **Stationery Settings** tab, to change the text that will be used when you select the **Send From Stationery** option.
- If you wish the email body to be a fixed width and be centered, enable the **Automatically center email body** checkbox and enter a value in the **Width** field. The default value for width is 6.75 inches but this value can be changed as needed.

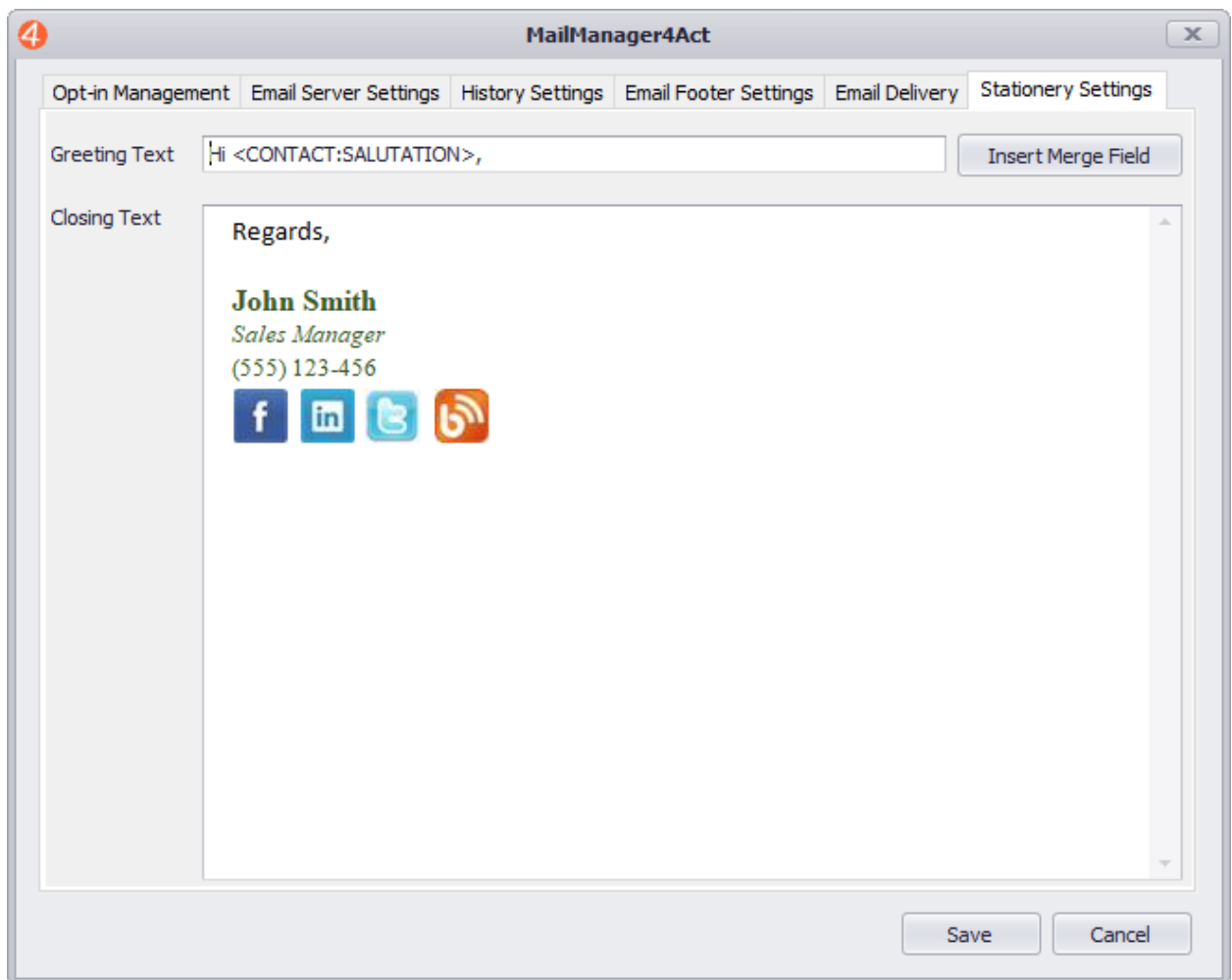


- If you require your logo to be displayed at the top of the email, click the **Browse** button as shown below and select your logo image file. Using the **Logo Alignment** dropdown, you can position the logo to the left, middle, or right of the email.



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- Modify the **Greeting Text** if needed. Click the **Insert Merge Field** button if you wish to include any fields from your database other than the default of Salutation.
- Enter your signature in the **Closing Text** textbox. In most cases, the most convenient option would be to copy your email signature from Outlook and edit it as needed.





## Configuring Webform Settings

- MailManager4Act can also allow the users to generate webforms which can be linked to from a website. Once Contacts fill out these webforms, MailManager4Act can download these submissions and automatically add/update Contacts in the database. If you wish to enable this functionality, please follow the steps below.
  - Click the menu **MailManager4Act > Webforms > Webform Settings**
  - Click the **Copy** button to copy the webform URL. You can place this link on your website for your Contacts to fill out.
  - Map the Form Field with your Act Fields. If you do not wish for a field to be included in the form, you may clear out the Form Field and Act Field columns.
  - Enable the **Required** checkbox for required fields and the **Duplicate Check** checkbox for fields that will be used to check for duplicates in the database. By default, only the Email Field will be used to check for duplicates however you can enable multiple fields if required.
- Note:** Fields that have duplicate check enabled must also be marked as **Required**

- If you wish the webform to create Contacts in the database if a match is not found in the database based on the **Duplicate Check** column, enable the **If a match is not found, create a new Contact** checkbox, otherwise leave this option disabled. If disabled, any submissions that do not match existing Contacts in the database will be deleted.

**Web Form Settings**

☐ If a match is not found, create a new Contact

Public form URL:  Copy

**Field Mapping** | Other Fields

Map Webform fields to your Act fields

Form Field	Act! Field	Required	Duplicate Check
Name	Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company	Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>
▶ E-mail	E-mail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address 1	Address 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address 2	Address 2	<input type="checkbox"/>	<input type="checkbox"/>
City	City	<input checked="" type="checkbox"/>	<input type="checkbox"/>
State/Province	State	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Country	Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Zip/Postal Code	ZIP Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

Move Up | Move Down | Save | Cancel

- Click the **Other Fields** tab. Enter an email address in the **Contact Us email Address** field. This email will be present near the bottom of the webform which the users can click on to submit any additional questions.
- Enter your company address in the **Company Information** field.
- Enter any additional comments in the **Comments** field which will be displayed near the bottom of the webform.

- Once satisfied, click the **Save** button to save your changes to the server.

The screenshot shows a configuration window with two tabs: "Field Mapping" and "Other Fields". The "Other Fields" tab is selected. It contains three main sections:

- "Contact us" email address:** A text input field containing "support@domain.com".
- Company Information (This will be displayed under your Company name on the webform):** A text area containing "123 Anywhere ST" and "Toronto, ON A1B2C3".
- Comments (Displayed near the bottom of the webform):** A text area containing "General comments go here...".

At the bottom of the window, there are four buttons: "Move Up", "Move Down", "Save", and "Cancel".