


By clicking the vCard and vCalendar icons in LeadMaster, you can immediately save the contact or call back to Microsoft Outlook by selecting "Save and Close" in the Outlook pop-up window. Because the ACT! application only imports vCards and vCalendar items attached to email messages, a few additional steps are required, as outlined below.


Note: the steps outlined below assume that Microsoft Outlook is set up as the default email client on your computer and also the default application associated with vCard (.vcf) and vCalendar (.vcs) file formats.

Save a Contact to ACT!

 **Add Contact:** To save a LeadMaster contact to ACT! you can click on the Add Contact icon on a number of pages, including the main Profile (see Figure 1), Sales Update and Edit Profile screens.

To add a contact to ACT!:

1. Click the **Add Contact icon** next to any of the contacts listed on the Profile screen for the record (see Figure 1). This will launch Microsoft Outlook and display a new contact record (see Figure 2). Add Contact icons are also found on the Sales Update and Edit Profile screens.
2. Select **Action>Forward as vCard** in the Outlook window (see Figure 2). This will launch a new mail message with the vCard attached.
3. **Email** the new mail message to yourself. The email account you send the message to must be accessible via ACT! email functions.



Profile Record Status: ACTIVE

1 of 1

| Contact Info | |
|---|---|
| Name Ms. Jane Taylor  | Date Entered 4/11/2002 |
| Title Events Director | Contacted Date None |
| Title Code High Level | Last Updated 5/15/2002 - S. AdminSD |
| Function Marketing | Phone 316-555-9876 |
| Company Sample Record | Alt Phone 800-555-2400 |
| Address 1 123 Maple St. | Cell/Mobile 316-555-9988 |
| Address 2 Suite 600 | Fax 316-555-1000 |
| Address 3 | Email jane.taylor@company.com |
| City Anywhere | Web Address www.company.com |
| State KS | Company Revenue \$0 |
| Zip 67890 | # Emp. 0 |
| Country USA | SIC Code 0 |
| | Company # |
| | Ultimate Duns |
| | Site Duns |



| Contacts ADD | | | | |
|---|--------------------|--------------|--|---|
| Contact | Title | Phone | Email | vCard |
| Jane Taylor | Events Director | 316-555-9876 | jane.taylor@company.com |  |
| Frank Jones | Marketing Director | 316-555-1234 | frank.jones@company.com |  |

Figure 1: Contact Section of Profile Screen with "Add Contact" Icons

4. **Launch ACT!** and open the database to which you wish to add the contact. In ACT! select **View > E-Mail**, log into the email client and open the message containing the attached vCard (.vcf) file.
5. Right-click on the attachment and select **Open Attachment** to open the Merge window. Select OK (unless changes need to be made on the options available). The contact should now be saved in your ACT! database.

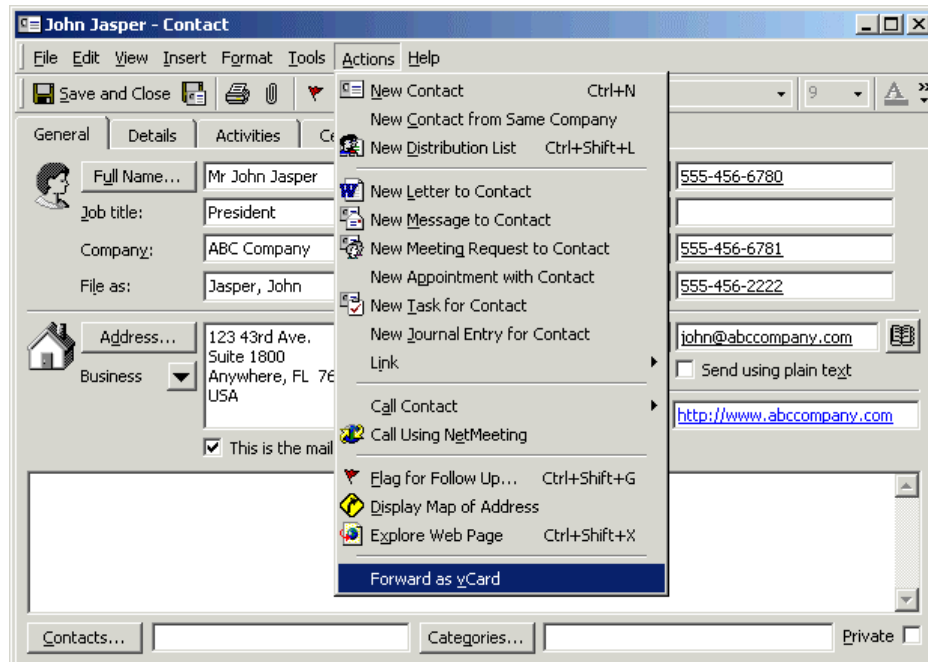



Figure 2: Action > Forward as vCard Menu Option in Outlook Contact Window

Save a Call Back to ACT!

 **Add Call Back:** To save a LeadMaster call back to ACT! you can click on the Add Call Back icon that appears next to the call back time on the Sales Update screen for the record (see Figure 3) as well as in the Call Back Report (for users with Report access).

To add a call back to ACT!:

1. Click the **Add Call Back icon** next to the call back time on the Sales Update record (see Figure 3). This will launch Microsoft Outlook and display a new appointment record (see Figure 4). The Call Back Report also contains Add Call Back icons.
2. Select **Action>Forward as iCalendar** in the Outlook window (see Figure 4). This will launch a new mail message with the vCalendar item attached.

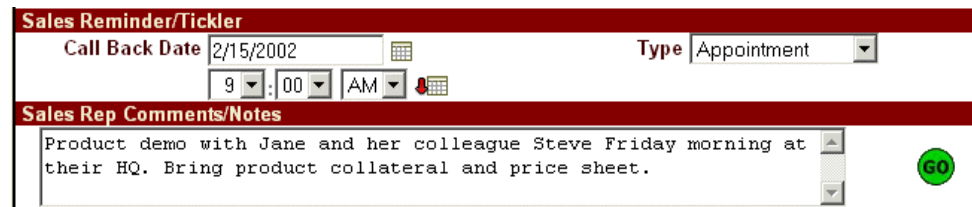


Figure 3: Call Back Section of Sales Update Screen with “Add Call Back” Icon

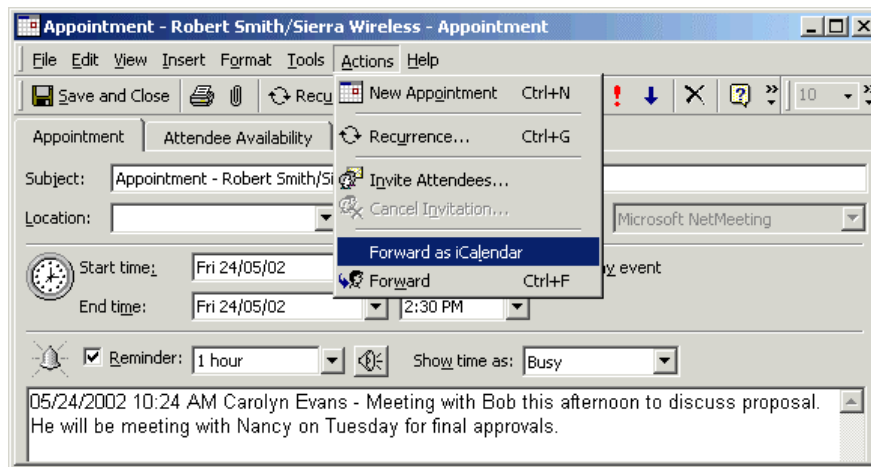


Figure 4: Action > Forward as iCalendar Menu Option in Outlook Appointment Window

3. **Email** the new mail message to yourself. The email account you send the message to must be accessible via ACT! email functions.
4. **Launch ACT!** and open the database to which you wish to add the call back. In ACT! select **View > E-Mail**, log into the email client and open the message containing the attached vCalendar (.vcs) file.
5. Right-click on the attachment and select **Open Attachment** to open the Merge window. Select OK (unless changes need to be made on the options available). The call back should now be saved in your ACT! database.

More Information

For additional information on contacts and call backs in LeadMaster, please refer to the Online Help section in the LeadMaster system or to the documentation contained in the Quick Reference Guide.

For additional support for ACT! functions, please refer to the Help Topics within the ACT! application or search the ACT! Knowledge Base at: <http://www.act.com/support/technicalsupport/knowledgebase/index.cfm>.