

How to Configure Internet Explorer for Act! Web

(6/1/17)
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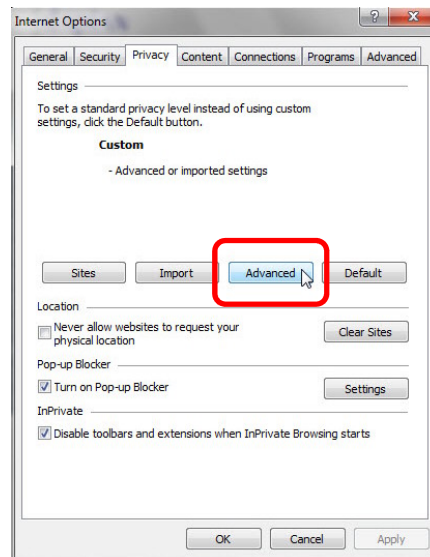
You may use the instructions in this document to configure **Internet Explorer v11 (IE)** to access your Act! database via the Web client *when using The Dapian Group's Web Hosting Service.*

The instructions provided in this document will allow you to use all supported Act! Web features and functions, as well as Word as the word processor and Outlook to send/attach email.

- I. **HOW TO CONFIGURE INTERNET EXPLORER.** Although it does not happen often, it has been reported that all or some of these settings on some computers can be lost. So, if you experience any issues using your Act! Web database please check and make sure that all of these settings are still intact.

Allowing Cookies:

1. Launch **Internet Explorer**.
2. Click the **Tools** menu.
3. Click **Internet Options**. The Internet Options dialog box appears.
4. Click the **Privacy** Tab.
5. Under the **Privacy** tab click the **Advanced** button. The **Advanced Privacy Settings** dialog box appears.

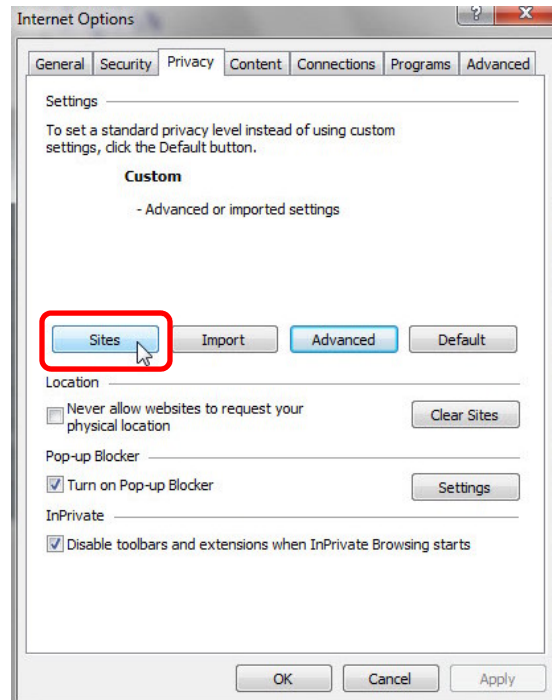


6. Enable the **Override automatic cookie handling** option. Ensure that the **Accept** option is enabled for **First-party Cookies** and **Third-party Cookies**.
7. Click **OK** to exit the **Advanced Privacy Settings** dialog box.



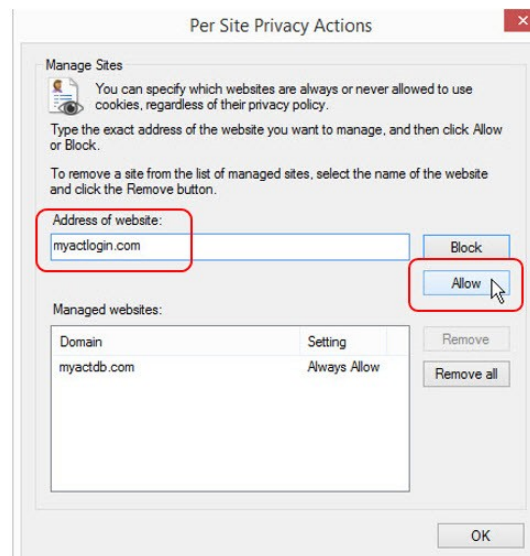
Configuring the Trusted Sites Zone

1. On the **Internet Options** dialog box, under the **Privacy** tab, click the **Sites** button.

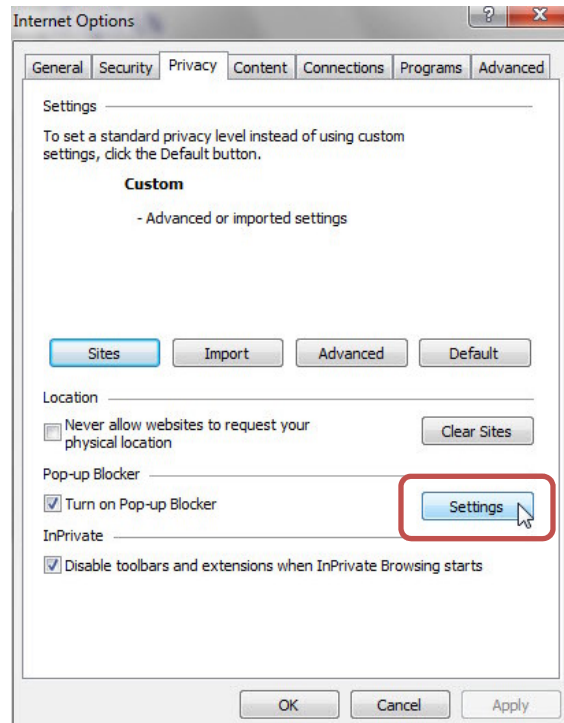


The **Per Site Privacy Actions** dialog box appears.

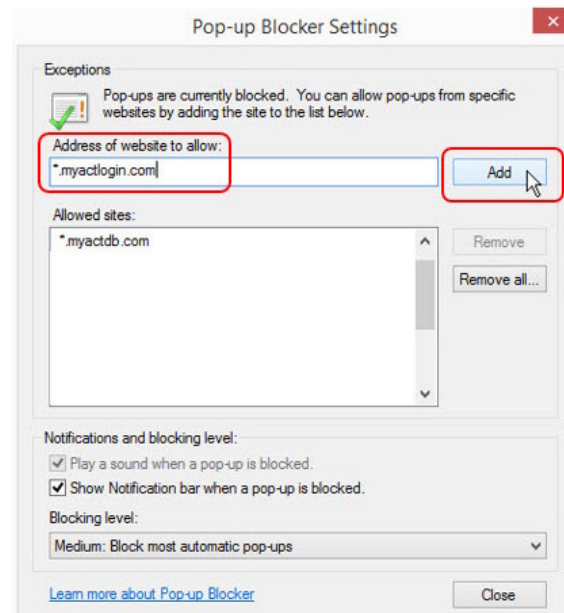
2. Type the address **myactdb.com** into the **Address of website** field.
3. Click **Allow**.
4. Type the address **myactlogin.com** into the **Address of website** field.
5. Click **Allow**.
6. Click **OK** to exit the **Per Site Privacy Actions** dialog box.



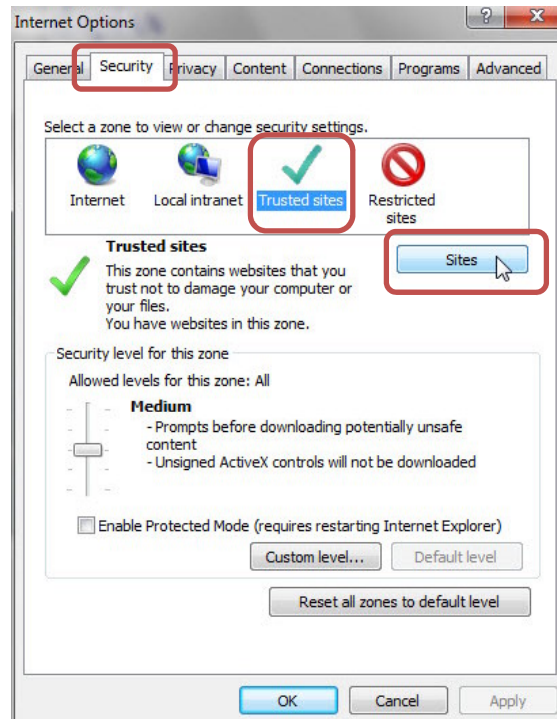
- On the **Internet Options** dialog box, under the **Privacy** tab under the **Pop-Up Blocker** settings, click the **Settings** button.



- The **Pop-up Blocker Settings** dialog box appears. Type the address ***.myactdb.com** into the **Address of website to allow** field.
- Click **Add**.
- Type the address ***.myactlogin.com** into the **Address of website to allow** field.
- Click **Add**.
- Click **Close** to exit the **Pop-up Blocker Settings** dialog box.

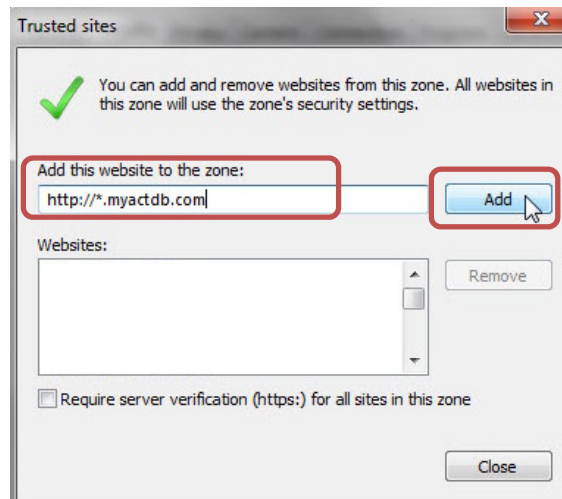


13. In the **Internet Options** dialog box, click the **Security** Tab.
14. Click the **Trusted Sites** Zone.
15. Click the **Sites** button.



The **Trusted Sites** dialog box appears. You need to add two addresses to the Website list.

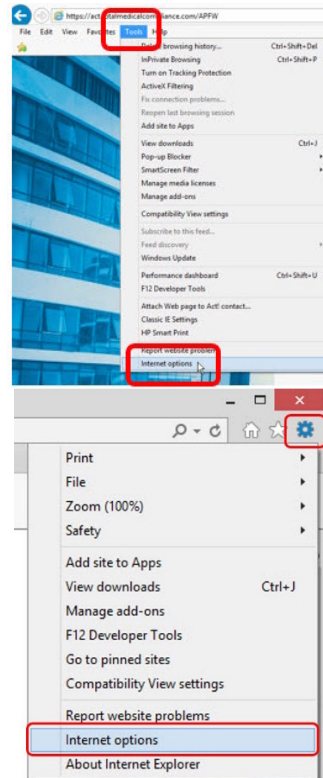
16. Uncheck **Require server verification (https:) for all sites in this zone.**
17. Type the address **http://*.myactdb.com** into the **Add this website to the zone** field.
18. Click **Add.**
19. Type the address **http://*.myactlogin.com** into the **Add this website to the zone** field.
20. Click **Add.**
21. Check **Require server verification (https:) for all sites in this zone.**
22. Type the address **https://*.myactdb.com** into the **Add this website to the zone** field.
23. Click **Add.**
24. Type the address **https://*.myactlogin.com** into the **Add this website to the zone** field.
25. Click **Add.**
26. Then click **Close** to exit the **Trusted Sites** dialog box.
27. Click **OK** to close the **Internet Options** dialog box.



Deleting Internet Explorer Browsing History

If you have issues using IE and your Act! database after following the above instructions you may find that deleting the IE browsing history may help.

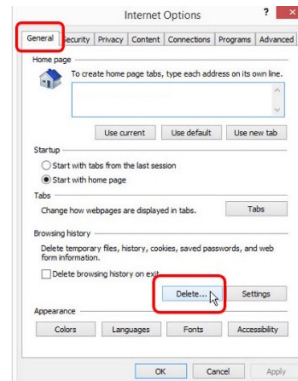
1. Open Internet Explorer.
2. Click on Tools and then Internet Options.
 - 2a. You may do this from the Tools menu.



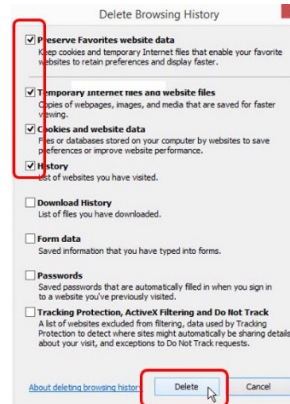
Or....

- 2b. You may do this from the Tools icon.

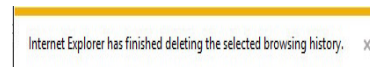
3. On the General tab click "Delete" in the "Browsing history" section.



3a. By default the following items are checked: Preserve Favorites website data; Temporary Internet and website files; Cookies and website data; History. It is recommended that you leave these checked. Click “Delete” and the “Delete Browsing History” message box closes.

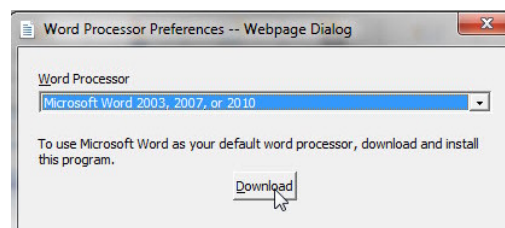


4. Click “Apply”. Wait until you see a message at the bottom of the screen saying “Internet Explorer has finished deleting the selected browsing history” and then click “OK” and “X” to close the message.



II. To configure Microsoft Word to be used as the word processor.

1. Close Microsoft Word if open.
2. Open your Act! Web database.
3. Click **Tools** from the main menu.
4. Click **Preferences** from the drop-down menu.
5. Select **Word Processor** in the message box.
6. Select **Microsoft Word** from the Word Processor drop-down list.
7. Click the **Download** button. NOTE: You will probably need to have Local Administrator rights to do this.



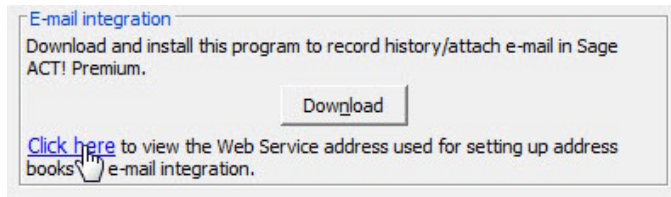
NOTE: If you experience issues with the Act! Web and Word integration, it may be best to uninstall this and then reinstall it. You will also be required to uninstall the current version if your Act! database has been upgraded. Here is how to do this:

1. Open Windows Programs and Features.
2. Locate and select “Act! Premium (Web) Mail Merge” in the list.
3. Click on “Uninstall” and follow the prompts to uninstall.
4. You may now reinstall the Act! Web and Word integration following the instructions in section II above.

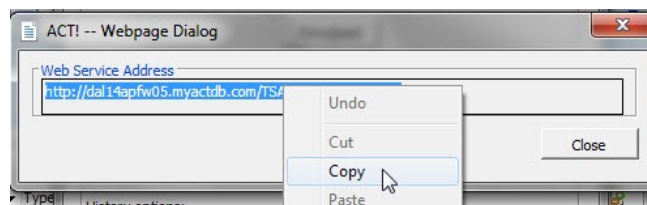
III. To configure Microsoft Outlook (2010/2013/2016) to be used as the email interface.

NOTE: If the Windows version of Act! has ever been installed and configured on this computer you must un-configure it in Act! and Outlook before proceeding.

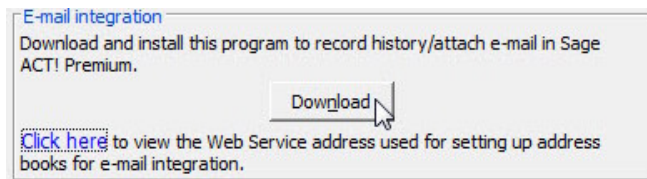
1. Close Microsoft Outlook if open.
2. Open your Act! Web database.
3. Click **Tools** from the main menu.
4. Click **Preferences** from the drop-down menu.
5. Select **E-mail** in the message box.
6. Click the **Click here** link in the **E-mail integration** section.



7. Highlight and copy the URL that appears in this message box. You will use this information in a step that follows.
8. Click **Close**.

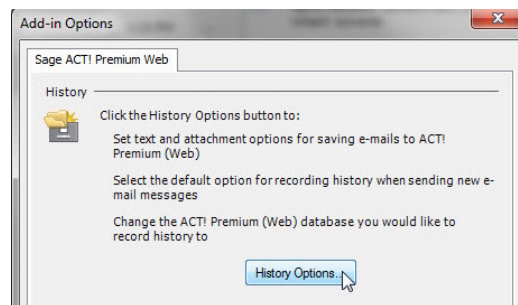


9. Click the **Download** button. Be patient as it may take a few minutes to download. You may need to have Local Administrator rights to do this. Also, the Downloads message box may not appear by itself; you may have to click on it to see it.

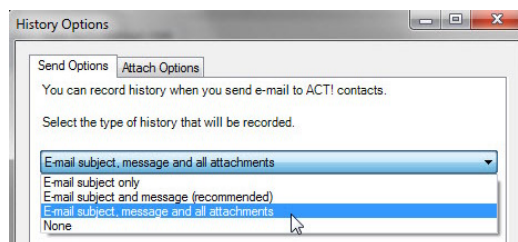


10. Click run and follow prompts to install this add-in. Be patient as it may take a few minutes to start. You may have to open the installation window from the Task Bar.
11. If you see a message that reads "Act! has detected that you have Outlook and/or Google integration already installed..." click "Yes" and proceed. If the installation doesn't complete you should contact Dapian Group for assistance.
12. Click **Finish** when prompted.
13. Click **OK** to the message referencing IIS if received.
14. Open Outlook to configure the Act! Premium for Web Address Book and how Outlook will record e-mails to the Act! Contact History. The following instructions are for Outlook 2010/2013/2016.
15. Click **File, Account Settings and Account Settings**.
16. Click the **Address Books** tab.
17. Click the **New** icon.
18. Select the **Additional Address Books** radio button.
19. Click **Next**.

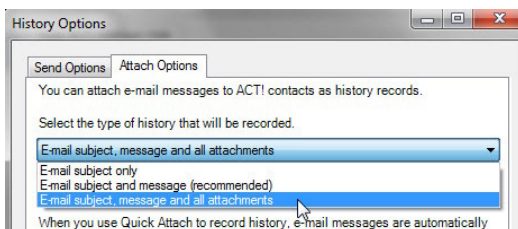
20. Highlight **ACT! Premium for Web Address Book** and click **Next**.
21. The Address Books message box appears, click **Add**.
22. If the Web Service address box is empty, right-click the mouse and paste the data from step 7 above.
23. Click in the Database Act! Premium for Web database box and you will see the name of your database. If you see more than your database name select your database.
24. Enter your user name, which is your first name, space, last name (e.g. Jim Smith).
25. Enter your password (same one you use for logging into the database).
26. Click **OK** and you are returned to the Address Books message box.
27. Click **Close** and then **OK** to the "The changes you made..." message box.
28. Click **OK** to the "You must restart Outlook..." message box.
29. Click **Finish** and then **Close**.
30. Close Outlook.
31. Reopen Outlook.
32. Click **File, Options and Add-Ins**.
33. Click the **Add-in Options** button.
34. Click the **History Options** button.



35. On the **Send Options** tab select the method you want to use. I recommend that you select **Email subject, message and all attachments**.



36. On the **Attach Options** tab select the method you want to use. I recommend that you select **Email subject, message and all attachments**.
37. Click **OK** twice. You may now use Outlook.



IV. How to **Uninstall Act! Web and Outlook Integration**

If you experience issues with the Act! Web and Outlook integration, it may be best to uninstall this and then reinstall it. You will also be required to uninstall the current version if your Act! database has been upgraded. Here is how to do this:

1. Open Windows Programs and Features.
2. Locate and select "Act! Premium (Web) Integration" in the list.
3. Click on "Uninstall" and follow the prompts to uninstall.
4. You may now reinstall the Act! Web and Outlook integration following the instructions in section III above.