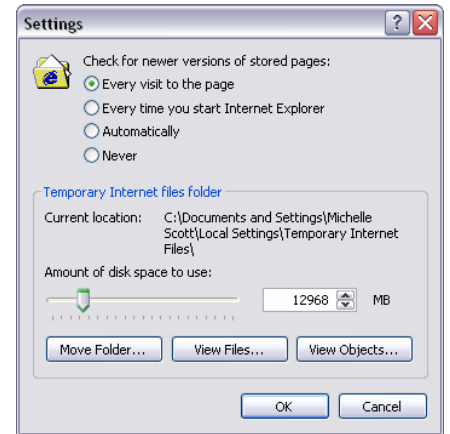
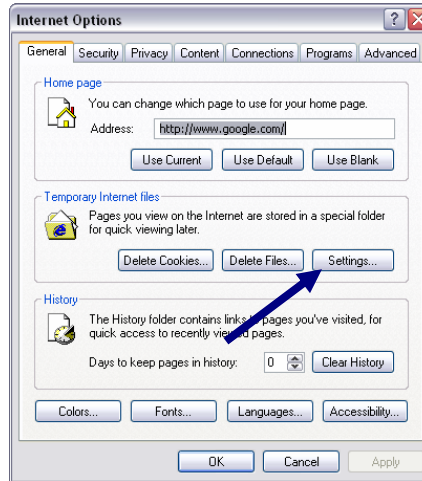


## Before You Begin

There are a few Internet Settings that optimize your ACT! Premium for Web experience.

1. Open Internet Explorer
2. Click **Tools**
3. Choose **Internet Options**
4. On the **General Tab**, click **Settings** in the Temporary Internet Files area
5. Under "Check for newer versions of stored pages" choose **Every visit to the page**
6. Click **OK**
7. Click the **Privacy tab**
8. **Change** the setting to **medium** or lower
9. **Uncheck** Block pop-ups
10. **Click OK**



## The First Time

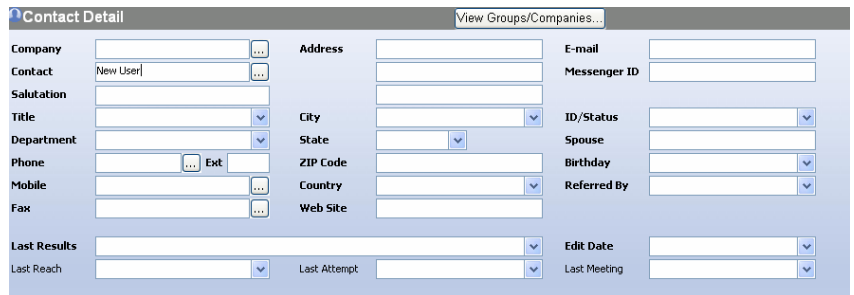
Before jumping into managing your Contacts, take a moment to setup your ACT! database. The following section walks you through setting up your My Record and setting E-mail Preferences.

## Setting Your "My Record"

The first record you see when logging into ACT! is the "My Record". The My Record is your Contact information in the ACT! database. This information used when merging word processing documents, emails and correspondence to your customers. You'll want to make sure that your My Record is up-to-date and complete.

1. Log into ACT!
2. The record you immediately see should be your My Record
3. To be sure, click Lookup
4. Select My Record

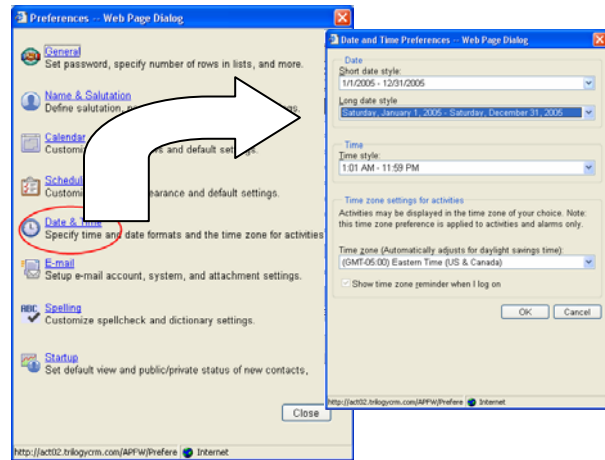
Fill in any empty fields with the appropriate information. Make sure to include your email address and phone number, including area code.



## Setting Your Time Zone

With ACT! Premium for Web you can schedule and then view activities on the calendar and schedule your activities according to your local time zone. To set your time zone:

1. Click on Tools
2. Select Preferences
3. Select your Short date style
4. Set your Long date style
5. Set your Time zone



If you change time zones frequently, it's a good idea to select "Show Time Zone Reminder when I log On" checkbox.

## Setting ACT! Email Preferences

There are two e-mail options for sending ACT! Premium for Web.

1. Use your Local Email Client - ACT! will use your local Outlook, for instance
2. Use the ACT! For Web Server to send your messages.

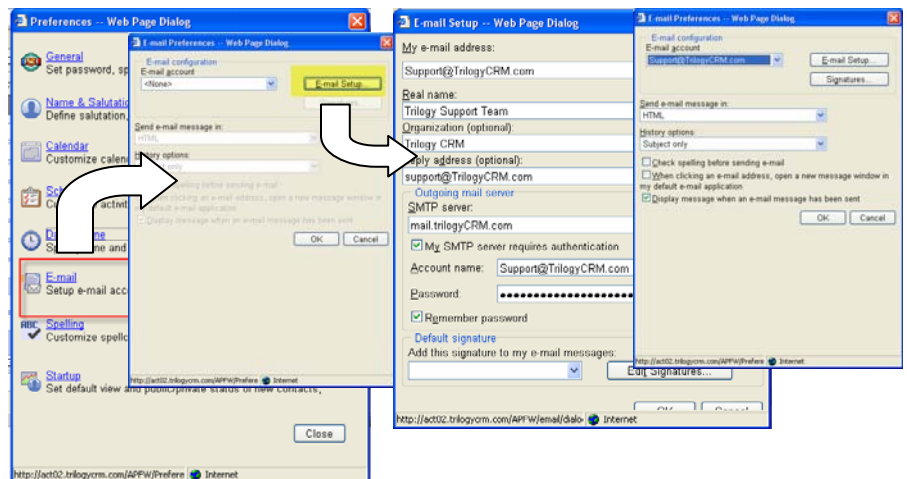
There are distinct advantages to each option. *Check with your Company Administrator for the recommended or required method of using the Email Function.*

Using the Local Email Client (like Outlook) **does not** create ACT! History. You will need to manually copy and paste the details of your email into a History item on the contact.

By default, the system is setup for your Local Email Client. No configuration is necessary. If you want to be able to record email History automatically, follow these steps to configure the

system to send Emails from the Web Server.

1. Click Tools
2. Choose Preferences
3. Click Email
4. Click the Email Setup Button



You need to fill in **AT LEAST** the My Email Address ,Real Name, SMTP Server, Account Name and Password fields.

If you are unsure of the settings please contact your Company Administrator.

Once you have completed the fields click the "O.K." button at the bottom to save your changes. You should see your Email Address listed in the Email Account dropdown. You can now configure the method with which to send your emails and the History options. It's a good idea to click the "Check spelling before sending e-mail" check box.

## Other Settings...

There are a number of other "Personalizations" you can make to ACT! Premium for the Web. You can explore the Tools – Preferences dialogue box to see all of your options. If you are unsure what impact a setting change may make do not hesitate to send an email to [Support@TrilogyCRM.com](mailto:Support@TrilogyCRM.com) for clarification.