Quotes4Act!
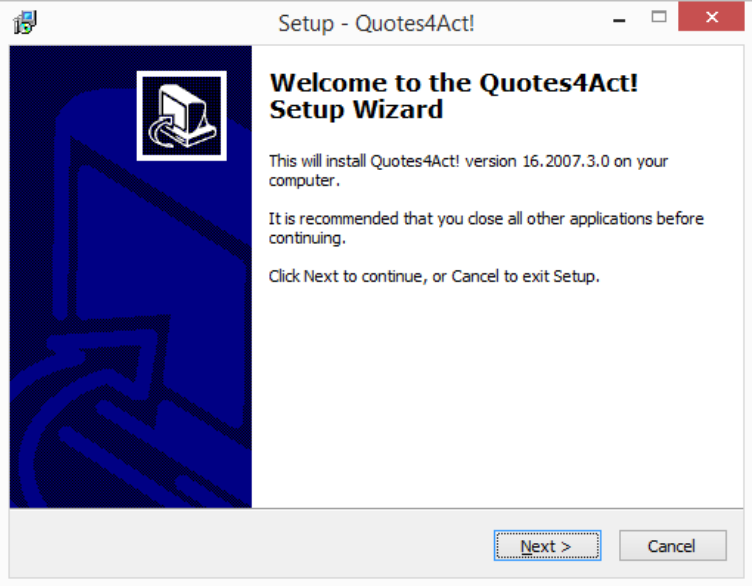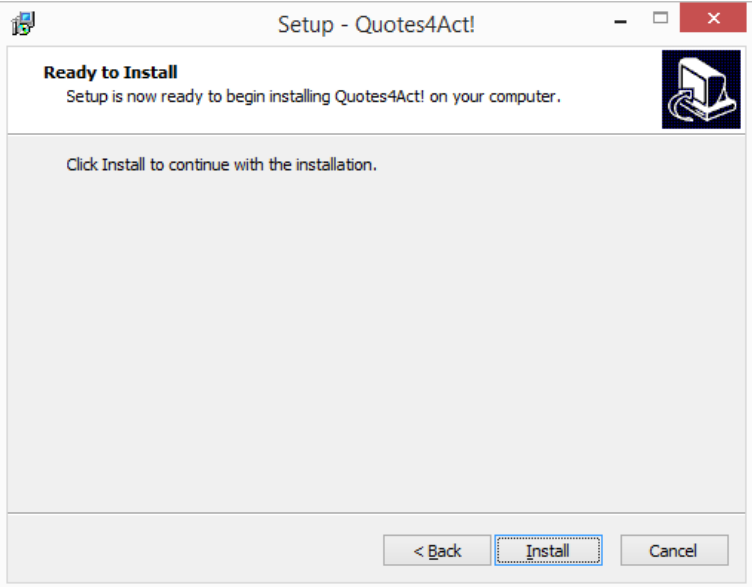# User Guide

Revision 1.01

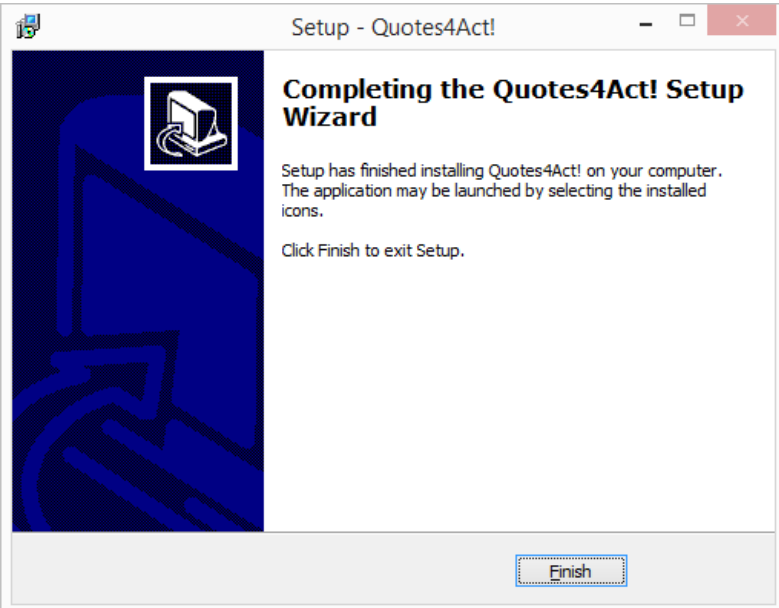## *Quotes4Act! User Guide Contents*

What is Quotes4Act!?

Quotes4Act! is the fastest way to create, attach and send professional quotations, proposals or any other documents . In just a few clicks, you can easily send a quote to one or more contacts in your Act! Database. By merging your Act! data into a Microsoft Word template, you can email the quote with the subject and body based on your template and Act! data. Additionally, you can attach a copy of the quote (PDF or Word document) to the email which will then be attached to the contact's History or Documents tab in Act!.
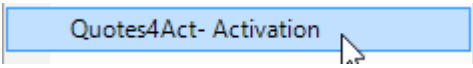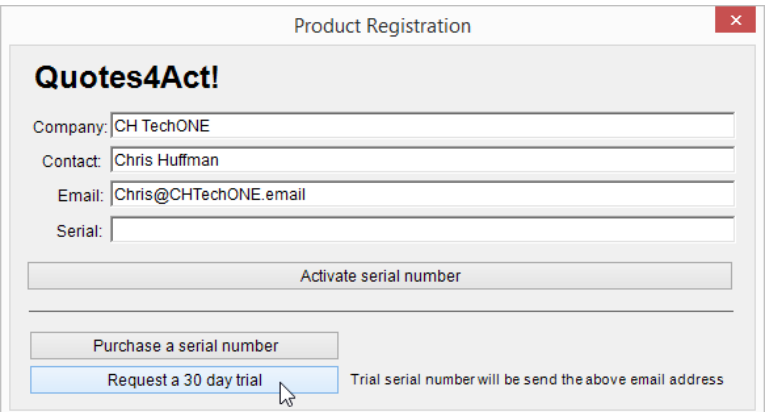
Quotes4Act! Features

- Create documents in PDF or Microsoft Word format from Microsoft Word templates.

- Create as many templates as you like for your team to share.

- Merge information from Act! contacts, companies, groups & opportunities into your documents and email body.

- Create documents for the current contact or a lookup of contacts.

- Documents are automatically saved with the naming convention you design using the template name, Act! data and the date/time.

- Documents are automatically attached to the History or Documents tab in Act!.

- Documents can also be attached to a new email message, with subject and body based on a template and merged Act! data.

- The email can be sent to one or multiple addresses found on the Act! contact, company, group and/or opportunity.

- Achieve all of the above in just a few clicks!

How to Install Quotes4Act!

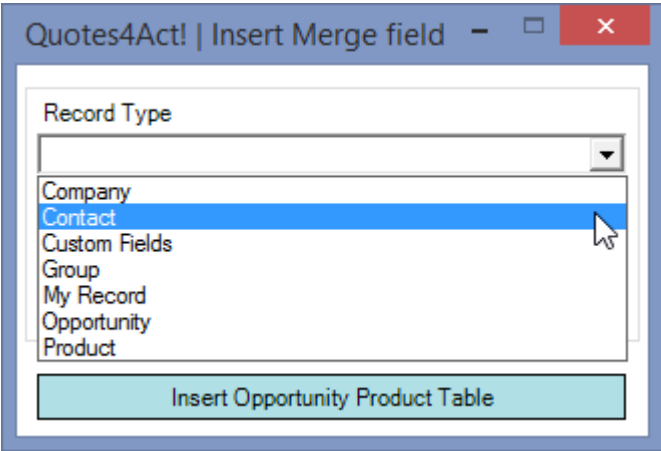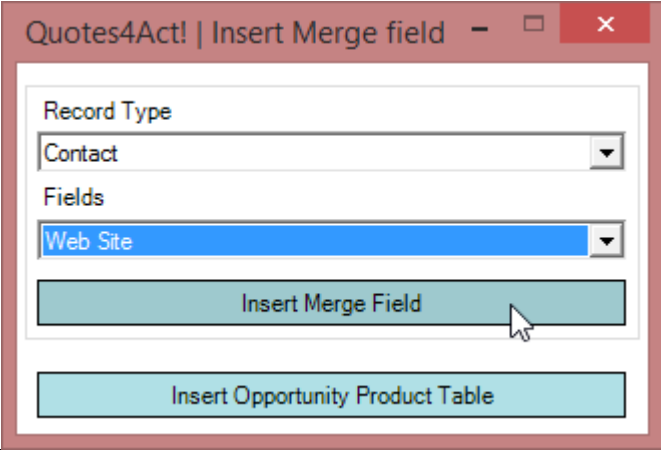| Step	What to do	Comments
1.	**Download** Quotes4Act!	Save the Quotes4Act.exe to a location that you can access.
2.	**Open** the folder where the installation file was saved and **double-click Quotes4Act.exe**	This will start the installation process.
3.	Click **Next**	
4.	Click **Install**	

5.	Click **Finish**.	
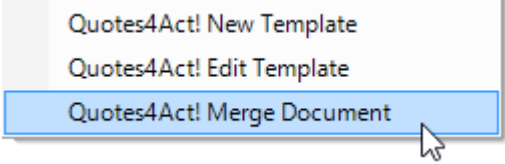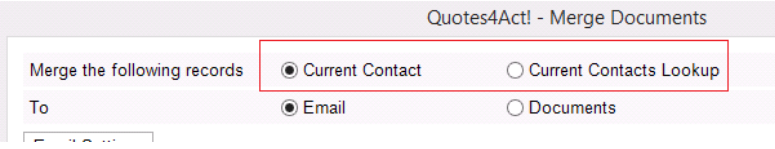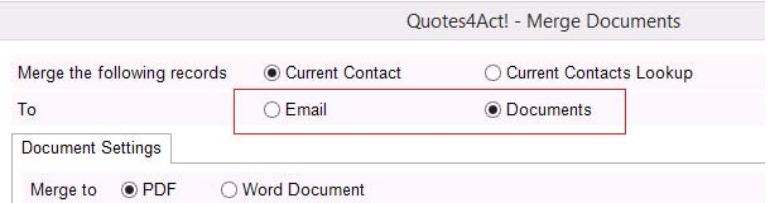
How to Activate Quotes4Act!
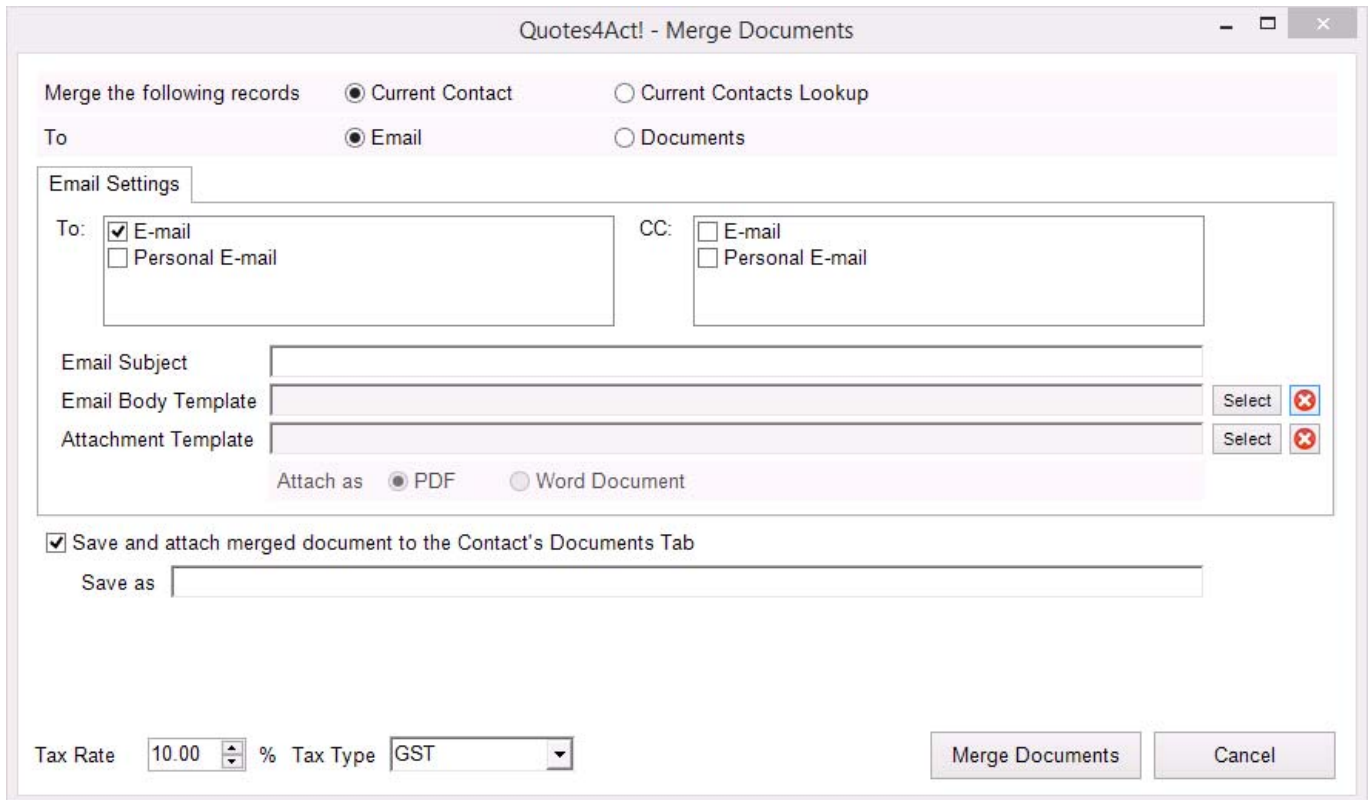
Step	What to do	Comments
1.	Open Act!	
2.	In Act!, click the **Tools** menu	
3.	Click **Quotes4Act - Activation**	
4.	Enter your **serial number** and click **Activate serial number** **Note:** If you do not have a serial number select **Request a 30 day trial** or **Purchase a serial number**	

How to Create a Template

Step	What to do	Comments
1.	Open Act!	
2.	In Act!, click the **Write** menu	
3.	Click **Quotes4Act! New Template** **Note:** If this menu item is missing, ensure you have activated Quotes4Act! - see [How to Activate Quotes4Act!](#)	Microsoft Word will open a new template for you to edit.
4.	Use the popup window to insert merge fields.	
5.	**Save** to the Templates folder in your database when you are finished editing	

How to Create a Quote with Quotes4Act!

Step	What to do	Comments
1.	Open Act!	
2.	In Act!, click the **Write** menu	
3.	Click **Quotes4Act! Merge Document** **Note:** If this menu item is missing, ensure you have activated Quotes4Act! - see [How to Activate Quotes4Act!](#)	Quotes4Act! New Template Quotes4Act! Edit Template Quotes4Act! Merge Document
4.	Select to send to the **Current Contact** or **Current Contacts Lookup**	Quotes4Act! - Merge Documents Merge the following records ● Current Contact ○ Current Contacts Lookup To ● Email ○ Documents
5.	Select to merge to an Outlook **Email** or a **Document** file	Quotes4Act! - Merge Documents Merge the following records ● Current Contact ○ Current Contacts Lookup To ○ Email ● Documents Document Settings Merge to ● PDF ○ Word Document
6.	If selecting Email, select which Email address fields to send the message(s) to and enter a subject line for the message(s) If merging to an attachment or document file, select PDF or Word format, and a filename If using the custom field to add tax to a quote, enter the tax rate & type	

Compatibility

Act! version 16 and above
Microsoft Word 2010 and above

Troubleshooting

If you have any trouble with the installation or use of Quotes4Act!, please try the following steps prior to requesting support.

1. **Restart your computer & try again**

2. **Download Latest Version of Quotes4Act!**

Ensure you have the latest version of Quotes4Act!. You can download the latest version from
http://downloads.acttoday.com.au/software/addons/Quotes4Act.exe

Still need help?

If you are still experiencing issues with Quotes4Act!, please email support@acttoday.com.au
To speed up the resolving of your issue, please include the version of Act! and Windows that you are using as well as any screen shots of your issue.