

CSV Fast Import for ACT!

Designed for ACT!

Print Manual

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CSV Fast Import for ACT!

Import CSV Data into ACT! Fast!

by *PersonalCRM Inc.*

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CSV Fast Import for ACT!

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Publisher

Tom Wikman

Special thanks to:

Special thanks to our customers for their input and support in testing and encouraging us to go forward with this project.

Special thanx to the Wikman family for all their support.

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Foreword

*Clicking the OK button when importing data is a
waste of my time...
A PersonalCRM Customer*

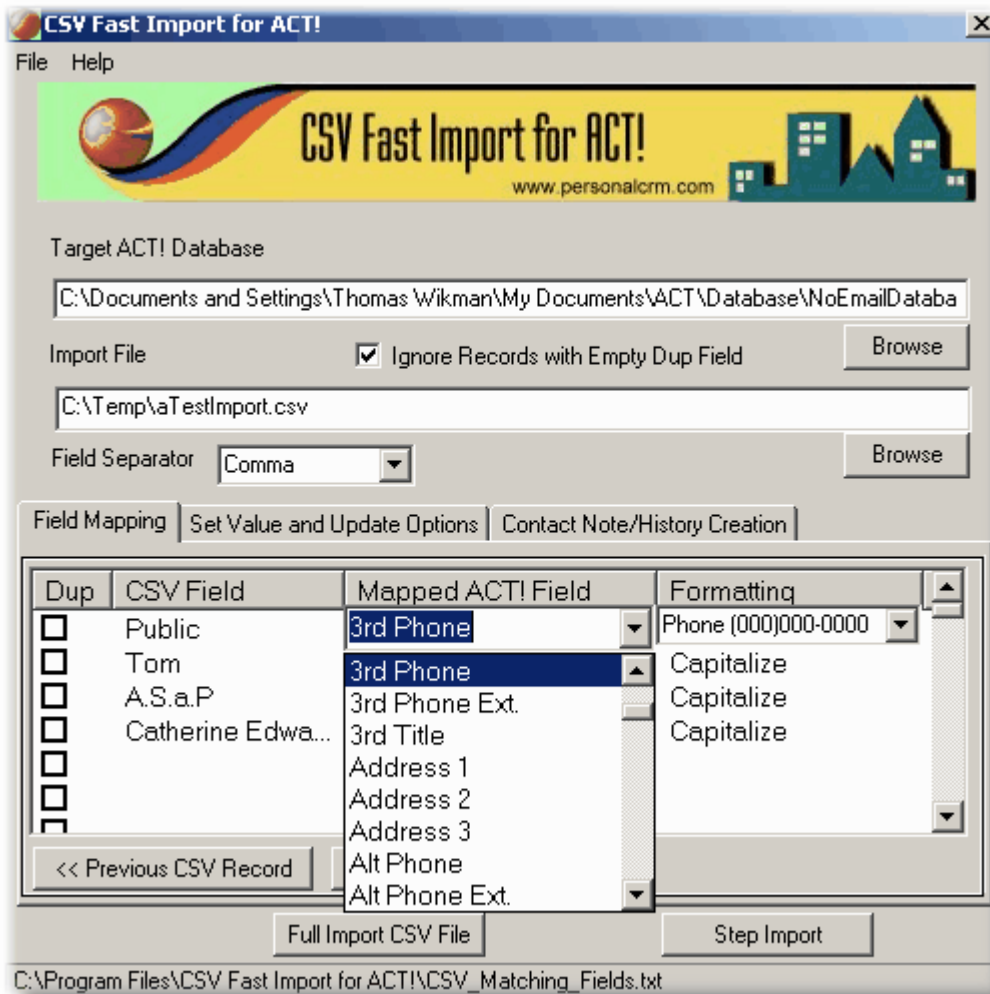
CSV Fast Import for ACT!

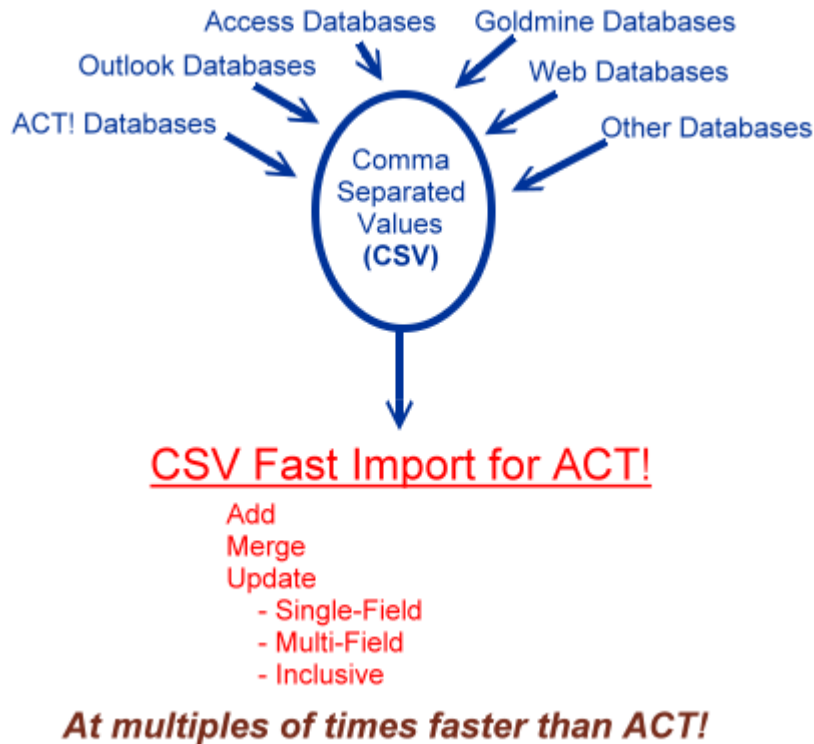
Import CSV Data into ACT! Fast!

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1 Welcome





Welcome to **CSV Fast Import for ACT!**, the fastest way for you to import **Comma Separated Values (CSV)** into ACT! Comma separated files are data files represented in text format that are a common representation of data amongst more providers of data.

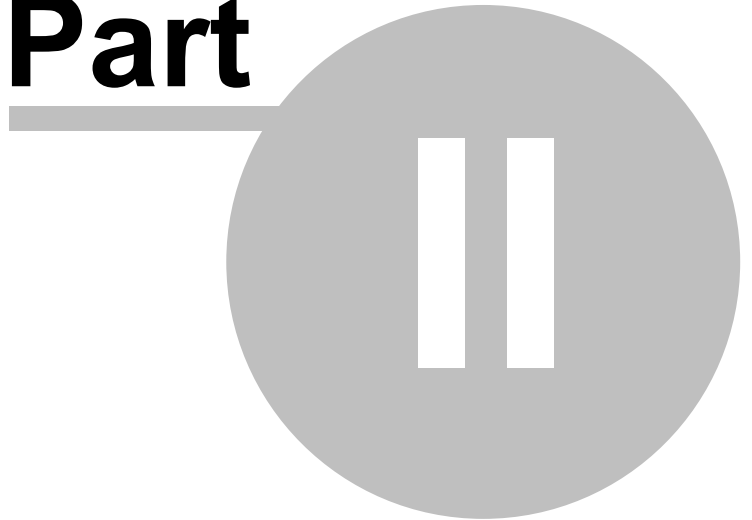
With **CSV Fast Import for ACT!** you'll be able to:

- **Import CSV data into ACT! in record time.** In our tests, we have metered the speed of CSV fast import to be 10-40 times faster than the built-in ACT! import routines. What would otherwise take 1 week to do, it takes only 1 hour with CSV Fast Import.
- **Update data with CSV Files.** Select 1 or many fields that you want to match and update date in your ACT! database.
- **Format Data when importing!** Format the data to what you desire when importing.
- **Run the import interactively or in the background.** You can setup automatic imports using the windows scheduler
- **Use any field in ACT!** as duplicate checking field, including the Email Address of the contact.
- **Setup different import profiles** to manage different import parameters and matching
- **And Much, much more....**

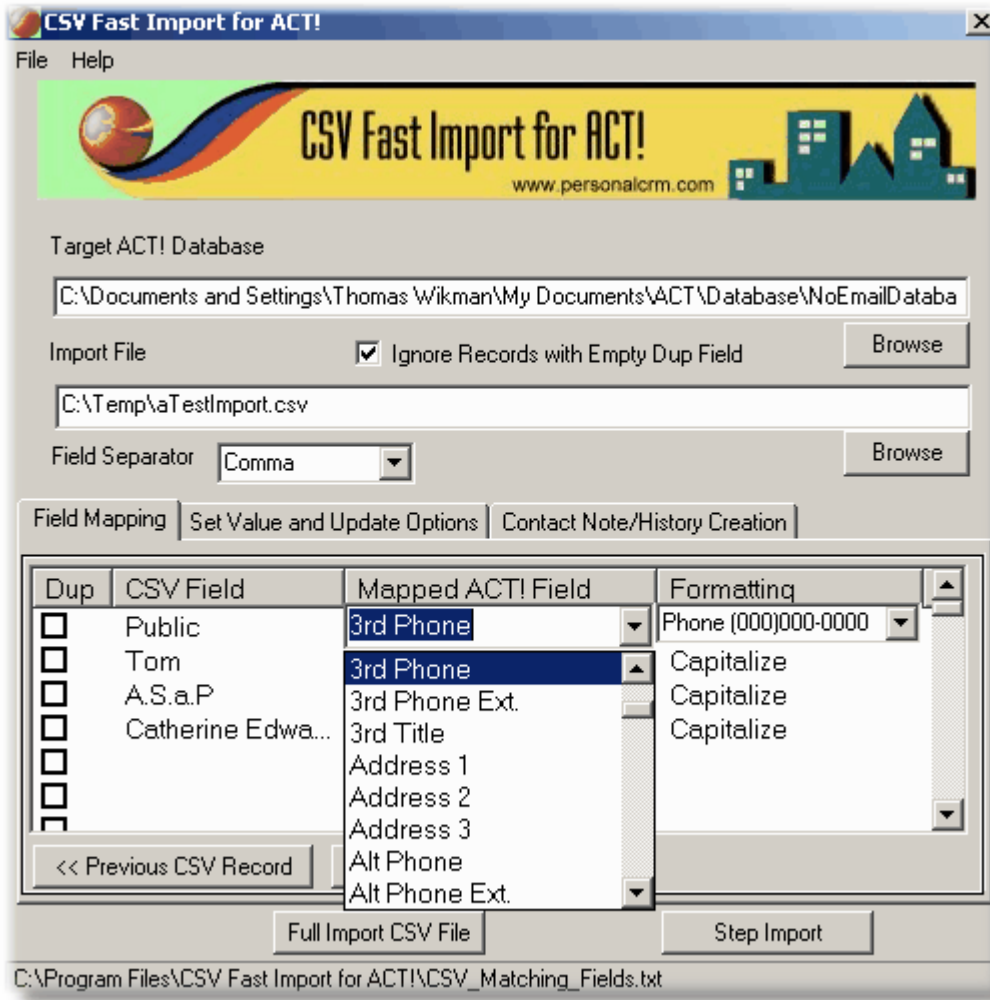
CSV Fast Import for ACT!

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2 Introduction



The purpose of CSV Fast Import for ACT! is to allow users to import Comma Separated Values into an ACT! database very fast. With our unique duplicate checking, your time to import contacts into ACT! is reduced dramatically. In addition, you can allow CSV Fast Import for ACT! to do its work unhindered i.e. you can spend your time doing others tasks while CSV Fast Import does the work.

2.1 Why Use CSV Fast Import

CSV Fast Import is an efficient means for you to import Comma Separated Values (CSV) from multiple sources into an ACT! common database with speed and efficiency.

Speed

CSV Fast Import is the fastest import tool for ACT! in this planet!!! Whether you are importing 500 or 50,000 contacts into your ACT! database, CSV Fast Import will zoom through the import procedure in record time. Our innovative duplicate checking mechanism makes bringing in data from other databases a breeze.

Ease of Use

Install and in less that 1 minute you could be importing the data you need into your database with full control of where, how, and which fields you want to import. Our interface makes imports as easy as possible.

[Field Selectable Updates](#)

Our user selectable fields allow you to select which fields you want to bring in to your database. Select from the input source as well as which ACT! field you want the data to be moved to.

[Email Specific Update](#)

Update contacts keyed on the email address of the contact. No longer keep contacts with the same email and create duplicate contacts when importing data.

[Profiles](#)

Setup different profiles for different import requirements. And you can use the profiles in the background processing as well!

[Background Processing](#)

Process your default profile or any defined profile in the background via a batch job.

[User Defined Update Checking](#)

Select which field you want to use to check for update matching i.e. use the name, email address, web site, contact user ID, etc.. Select and configure your import to your needs.

[Multi-Source Input into 1 Common Database](#)

Bring your data from multiple sources into 1 common database with no duplicates. Re-map fields and reassign fields that have been misplaced/mis-created on other databases.

[Update only matching contacts.](#)

Update only contacts that are related to the importing data. If a contact is not found, instruct CSV Fast Import to ignore, hence, do not create unnecessary contacts.

2.2 Help on CSV Fast Import for ACT!

You can obtain help for CSV Fast Import for ACT! in the following ways:

- **The help file shipped with the product.** The help file provided with CSV Fast Import for ACT is the most recent help file when this version of CSV Fast Import for ACT was created. We provide, an online version of this help file which may be more up-to-date than the shipped version
- **The online help file.** This is the most updated version of the help file. When additions and changes are made to the help file, they are always posted on the online help file. To access it, [click here](#).
- **Printed Version of this Help File.** You can download the made-for-print version of this help file from the web by [clicking here](#). You will need to have the Adobe .pdf reader installed on your system. To download the Adobe .pdf reader, [click here](#). To print the manual, click on the print button of the .pdf reader and the manual will then be printed on your local printer.
- **CSV Fast Import for ACT! Discussion Board.** Participate on PersonalCRM's discussion

board free of charge and pose questions and exchange ideas with other users of CSV Fast Import for ACT. All discussion threads are monitored by PersonalCRM's personnel and you will receive answers to questions that relate to product installation, setup, and use. To access the discussion board, [click here](#).

- **Email Support.** You can obtain free email support from PersonalCRM. Make sure that you explain your problem/question with as much detail as possible. You can either send the email to csvfastimport4actsupport@personalcrm.com, or use the support form by [clicking here](#).
- **Personalized, one-on-one support.** PersonalCRM will provide personalized, one-on-one support to paying customers. Support is provided on an hourly basis. If you are interested on one-on-one support, you can purchase it by [clicking here](#). A support professional will call you (US Only). If you are based outside the U.S., schedule a time to call so that we can make sure the best support person is available to receive your call.
- **Suggestions.** PersonalCRM is driven to provide software solutions that will satisfy our customers. Your input is important to us and we want you to contact us if you have any suggestions on added features or even improvements we can make to our products in order to make them better. [Please click here to submit a suggestion](#).

2.3 What is New With V3.0

Version 3.0 of CSV Fast Import for ACT! has added some key components that improve importing data into ACT!.

Major Features

- **Background Processing.** You can process profiles from the command line.
- **Multi- Profile Support.** Just create a profile and save it for later use.
- **History Creation Support.** Transfer data from the CSV file to the history record of a contact.
- **Multi-Database Support.** You can import CSV Data from multiple sources.
- **Improved Help Functionality.** New local and web help eases the use of CSV fast import.
- **Field Validation.** Fields are validated and converted before inserted into the ACT! contact.
- **Duplicate Actions.** With the new duplicate actions capabilities, you can do many things:
 1. Select to update the whole contact with the new data being imported.
 2. Select a particular field as duplicate identifier (including Email), and then update either the whole contact or just a specific field.
 3. Match input to email addresses. Use the contact's email address as identifier of the duplicate
 4. Select not to add contacts if no duplicate is found i.e. update only contacts that have been found on the database (inclusive update).
- **Speed, speed, speed.** Multiple improvements in data management have been introduced with leaps in processing speed.
- **Installation.** Our installation now takes less than 1 minutes and you are up and running before you know it.

2.4 How to Buy CSV Fast Import for ACT!



CSV Fast Import for ACT! is distributed worldwide by a variety of resellers and distributors.

To Purchase

Click on the Registration->Purchase menu option of CSV Fast Convert and you will be taken to the purchase page for the product.

Home page

<http://www.personalcrm.com>

Email support

support@personalcrm.com

Snail mail

PersonalCRM Inc.
891 Quetta Court
Sunnyvale, CA 94087

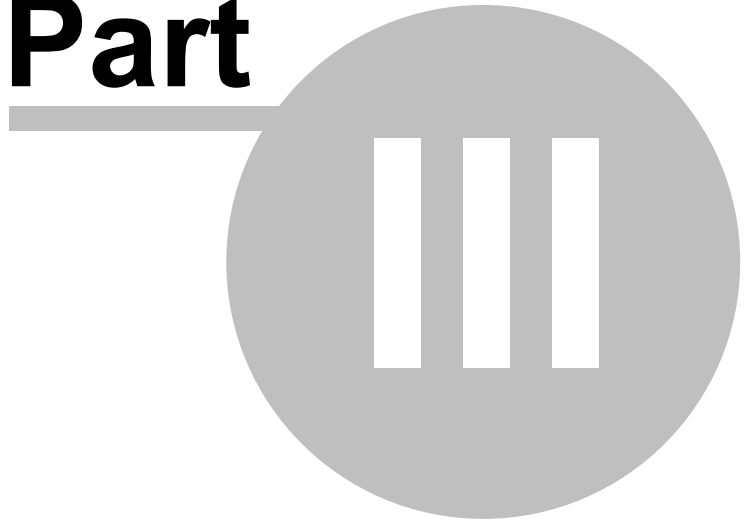
Fax

USA: (240)220-3244

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3 Installation

Installation of CSV Fast Import for ACT! is straightforward. The following is needed

- You'll need approximately 8mb of hard disk space
- ACT Installed on your system
- Administrator Privilege if running Windows XP, XP Pro, and 2000

To install, simply execute the CSV Fast Import for ACT! executable and follow the directions to install the program.

Sub-topics

CSV Fast Import for ACT! Compatibility

Lists the system with which CSV Fast Import is compatible with

License Registration

Instructions on the procedures on registering eConvert

End-User License Agreement

Uninstall

3.1 CSV Fast Import Compatibility

CSV Fast Import for ACT! is an Addon Product for ACT!. Hence, it requires the user to have ACT! installed in the machine. CSV Fast Import for ACT! is compatible with ACT! 2000 or above.

ACT! 2000/6.0 compatibility

[CSV Fast Import for ACT! is compatible with the following versions of ACT!:](#)

- ACT! 2000 with Service Pack 5.0.4.495 or 5.0.3
- ACT! 6.0 - All versions.

CSV Fast Import for ACT! may not work with ACT! 2000 without a service pack i.e. build 5.0.0. The programming interface in the original ACT! version has posed problems with CSV Fast Import for ACT! and we suggest that if you are running an original version of ACT!, that you upgrade.

[What to do if you have the original ACT! 5.0.0 build?](#)

You have to upgrade to ACT! to Version 5.0.4.495. The upgrade may be obtained for free from act.com. Download the software (16mb) and execute it.

From our tests, V 5.0.4.495 has shown to be very reliable.

[How to find out what version/build of ACT! you are running](#)

To find out what version of ACT! you are running, do the following:

1. Click on **Help->About ACT!** on the ACT! Contact Screen
2. Check the Build Number on the right hand corner of the About Screen. The number of the build has to be higher than 5.0.0.X which is the original release of ACT! 2000.

[CSV Fast Import is fully compatible with ACT! 6.0](#)

Operating System Compatibility

CSV Fast Import for ACT! is compatible with the following Windows operating systems:

- Windows 98
- Windows 98 - SE
- Windows Me
- Windows 2000
- Windows XP
- Windows XP Professional

3.2 Registration

Purchasing CSV Fast Import for ACT!!

To purchase CSV Fast Import for ACT!, click on the Buy/Purchase Button and it will take you to the web site for purchase. When the product is purchased, you receive a license code (some of our partners also call it a Serial Number), indicating that your product has been purchased and paid for.

To activate (we call it *unlock*) CSV Fast Import for ACT!, you must obtain an unlock key from PersonalCRM. To obtain the unlock key, you must submit your CSV Fast Import for ACT! serial number and license number to PersonalCRM Inc.

CSV Fast Import for ACT! License Code

When you purchase CSV Fast Import for ACT!, you are provided with a License Number (in some cases it is called a purchase serial number). This number is your proof that you have purchased the product. Click on Registration->License Registration and the software is then registered with our license server.

3.3 End-User License Agreement

CSV Fast Import for ACT! LICENSE AGREEMENT - PERSONALCRM Inc.

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3.4 Uninstall

To uninstall CSV Fast Import for ACT!, do the following:

- Click on [Start->Settings->Control Panel](#)
- Execute [Add/Remove Programs](#) from the Control Panel
- Select CSV Fast Import for ACT! from the listed programs
- Click Remove and CSV Fast Import for ACT! will be removed from your system.

[A Few Things](#)

- Installing and Uninstalling will not reset the evaluation period for CSV Fast Import for ACT!
- Uninstalling CSV Fast Import for ACT! will not reset the conversion counter

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4 Running CSV Fast Import

CSV Fast Import for ACT! is run by selecting the [Start->CSV Fast Import for ACT!](#) icon from the Start menu.

When you click on the program, the screen below will appear.

Before you are fully acquainted with CSV Fast Import for ACT!, it is recommended you backup the database in case any of the import is done erroneously.

Once the main screen is up, the following steps should be taken:

1. Select your database
2. Select the Field Separator used in the CSV Input File
3. Select your CSV Input file
4. Browse through the CSV file and match the CSV to the ACT! field
5. Check which field is to be used as duplicate checking.
6. Click on the Import CSV File.

Sub-Topics

The Main Screen

A description of the different areas of the main management screen.

Selecting a CSV File

How to select a CSV File and what settings to use.

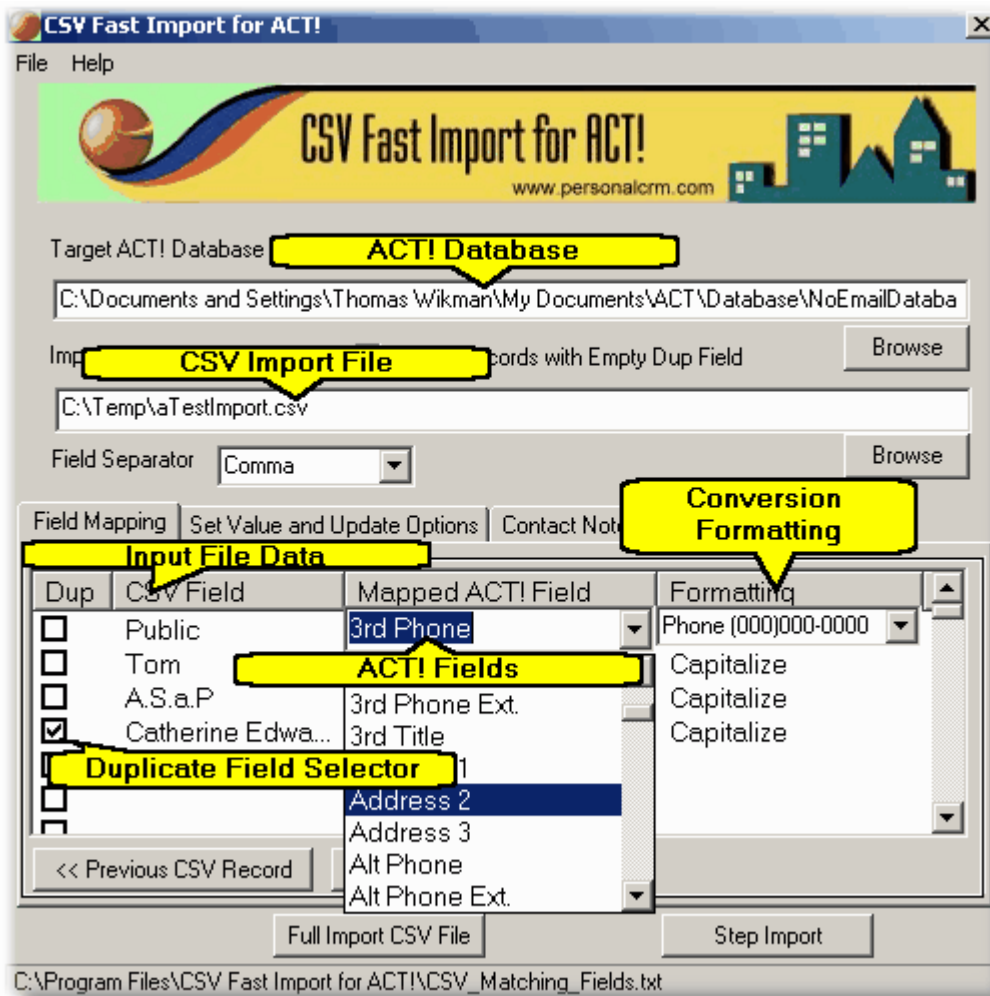
Matching CSV Fields to ACT! fields

How to select CSV fields to be imported and to match them to destination ACT! fields.

CSV Merge Options

A descriptions of the merge options available.

4.1 The Main Screen



The main screen indicates the data target and source. There is one flag that is set on the main screen:

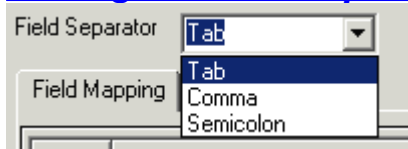
- **Ignore Records With Empty Dup Field.** Set this field when you want to ignore any record that has an empty duplicate field marker. For example, if you have set that the email is the duplicate field marker, ignore any record with an empty email field.

4.1.1 Selecting a CSV File

CSV files are data files that are exported from databases. The format, in general, is as follows:
 "data1", "data2", "data3",

All known databases have an utility or an option that allows it to either export the data as a Comma Separated Value or a Save As.. option that allows the user to save the database as a text file. Most of the time, the user is provided with an option of what to use as a delimiter i.e. what character to use between the fields to be imported. CSV Fast Import for ACT! supports 3 types of field separators, namely **Tab**, **Comma**, and **Semicolon**. If you saved the CSV file using the 3 supported separators, CSV Fast Import for ACT! will be able to read them.

Setting the field Separators



To set the field separators, click on the Field Separator drop down box and select the appropriate field separator you used when you saved the database.

Selecting the CSV File



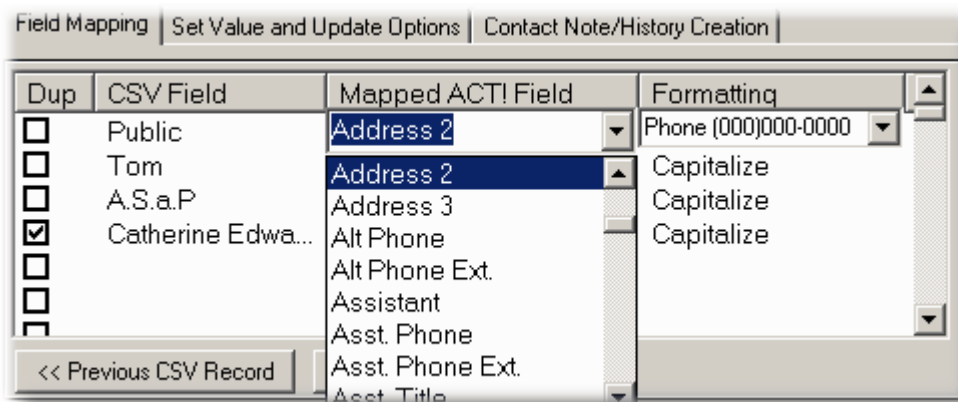
Click on the browse button if you want to search for the file on the system. Click OK when you have found the CSV File.

When the CSV file is selected, CSV Fast Import scans the first record and displays the record in the fields list. You can go to the next record if you need more information about the record fields. You are now ready to setup the field matching parameters.

4.1.2 Matching CSV Fields to ACT! Fields

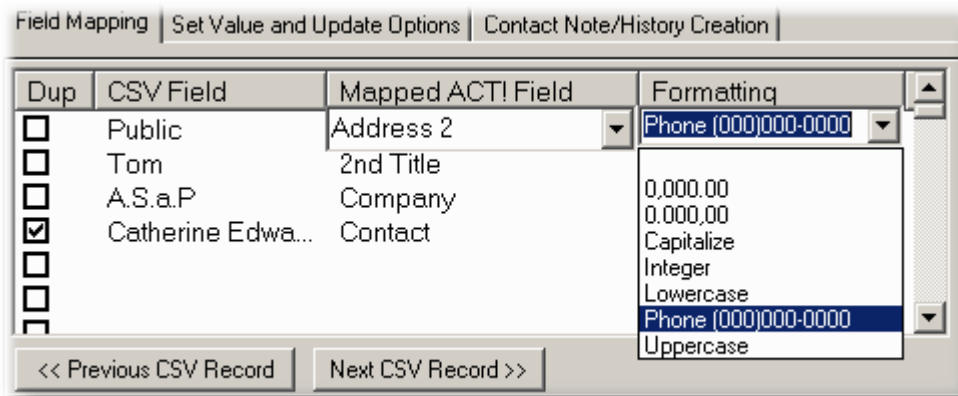
When the CSV file is selected, CSV Fast Import scans the first record and displays the record values in the fields list. You can go to the next record if you need more information about the record fields.

To select an ACT! field to map, simply click on the empty ACT! field and a drop down list will display the fields available.



Selecting the Format

You can select what format you want the data to be imported into the ACT! database.



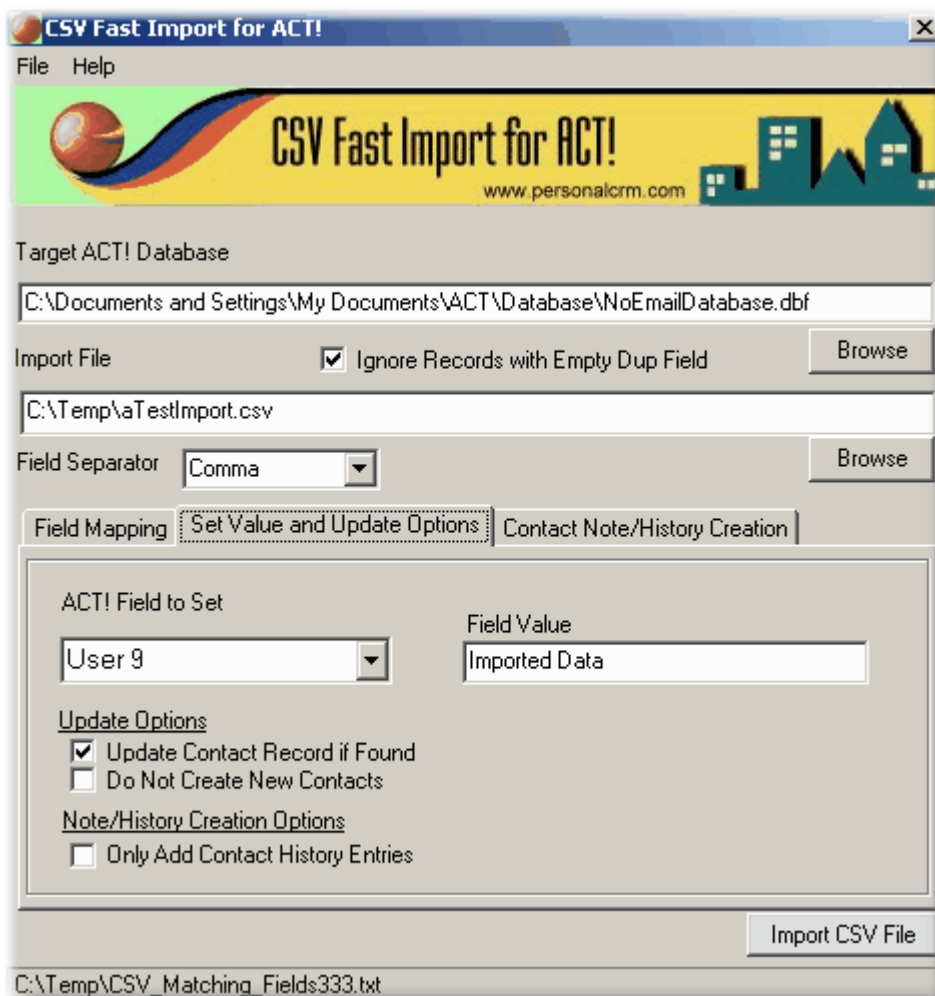
The following conversion formatting is currently performed:

- 0,000.00 - U.S. standard numerical conversion. For example a number 123456 is converted into 1,234.56 before being converted.
- 0.000,00 - European standard numerical conversion. For example a number 123456 is converted into 1.234,56 before being converted.
- Capitalize - Capitalizes the string. For Example first last become First Last
- Integer - Converts any number into an integer (no rounding).
- Lowercase - Convert the data into lowercase
- Phone (000)000-0000 - Takes the numbers in the phone number field and converts them into (123)456-7890
- Uppercase - Converts data into UPPERCASE
- Blank - No conversion is made.

[The Dup Checkbox](#)

The Dup Field is the field used to check for duplicates in the ACT! database. Any field may be used to check for duplicates.

4.2 Set Value and Merge Options



Set Value and Update Options

1. **ACT! Field to Set.** Click on the drop-down menu to get a list of ACT! fields you can set to a specific value. For every contact that is then imported (or updated), this field is then set to the value set in Field Value.
2. **Update Contact if Found.** If a contact is found using the duplicate field set, it is then updated accordingly. Only the fields setup are updated.
3. **Do Not Create New Contacts.** When importing the data, if a contact is not found, CSV Fast Import will not add a new contact. It will ignore that record and go to the next.
4. **Only Add Contact History Entries.** When set, only the history entries set in the Contact Note/History Creation tab are imported. If the contact is not found, the history is not imported.

4.3 Contact Note/History Creation

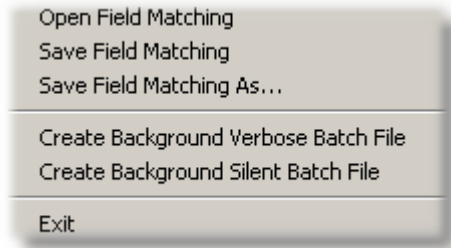


You have two options to create notes in the contact:

1. Create a fixed note on the contact history i.e. something like "Imported on March 12, 2004". A history record in ACT! is then created for the corresponding contact.
2. Create a note/history from the data in a particular field in the input CSV file.
- 3.

4.4 Saving Field Maps and Batch Jobs

Every and all field maps can be saved with CSV Fast Import for ACT!. Simply click on the File menu and you are presented with the following options:



- [Open Field Matching](#). This option allows you to open a field matching profile that you have saved in your drive. All extensions for field maps are .txt so you must know the name of the file you are looking for.
- [Save Field Matching](#). This option allows you to save your current field matching profile to your drive. The name and path of the field matching map you are using is listed on the bottom status bar of CSV Fast Import for ACT!
- [Save Field Matching As ...](#). This option allows you to save your field matching for later use. Make sure that you use a name that you recognize.
- [Create Background Verbose Batch File](#). This option create a .BAT file (a batch file) that can be executed in verbose mode i.e. all the prompts go to the screen and you can see what is happening. This is great for debugging.
- [Create Background Silent Batch File](#). When this batch job is created, the conversion is done without any prompts. Any errors in the conversion are saved into a file named: MessageFile.txt in the folder where the software is installed.

4.5 Background Processing

Background Processing or more aptly, Command Line processing has been introduced into CSV Fast Import with Version 3.0. You can control whether the software executes in interactive mode or in full silent mode. This is done by passing parameters to the CSV Fast Import Executable. The parameters are as follows and must be passed in the following order:

- -B - Indicates CSV fast import is to be run in Background mode i.e. start, execute the conversion, and exit. Any messages or errors are directed to the file MessageFile.txt in the installation directory of CSV Fast Import.
- -V - Indicates CSV Fast Import to run in Verbose mode i.e. if there are any errors or messages, the messages are directed to the screen.
- -F <ProfilePath> . Here you specify the profile you want to run. If no -F is specified, the default profile (the last accessed profile) is run.

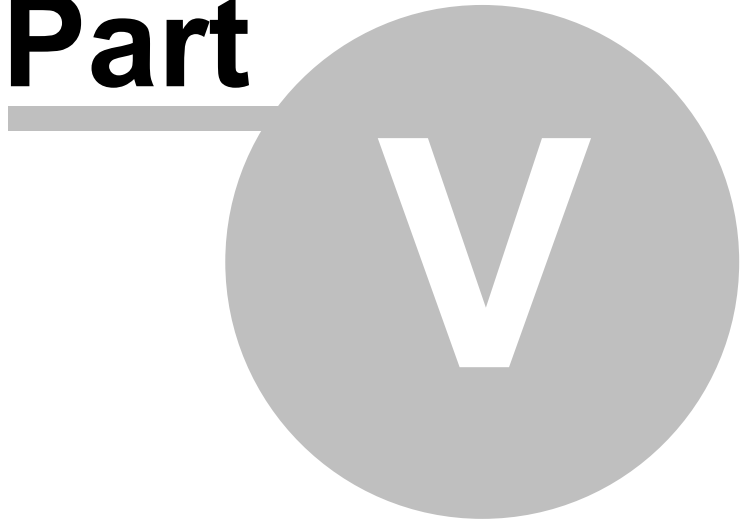
The best way to see how these commands are setup is to use the Batch Saving option in the File menu.

Also, you can execute the batch file from the Windows Scheduler.

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5 Tips and Tricks

The examples below lists a few of the applications of CSV Fast Import for ACT!.

Merge a CSV File

Merge a CSV file into ACT!. Bring in a CSV file exported from any database and merge it with ACT!

Updating Contacts with CSV Files

Use CSV Fast Import to update contacts in ACT!. Update only 1 field or multiple fields in ACT!

Only Adding New Records

Intelligent duplicate checking makes it so that you only add new contacts to your database.

Disabling Duplicate Checking

Import all contacts from a CSV file without any duplicate checking for speed.

5.1 Merge a CSV File

In this example, we want to merge a comma delimited file that has the following fields:
"First name", "Last Name", "Email Address", "Product"

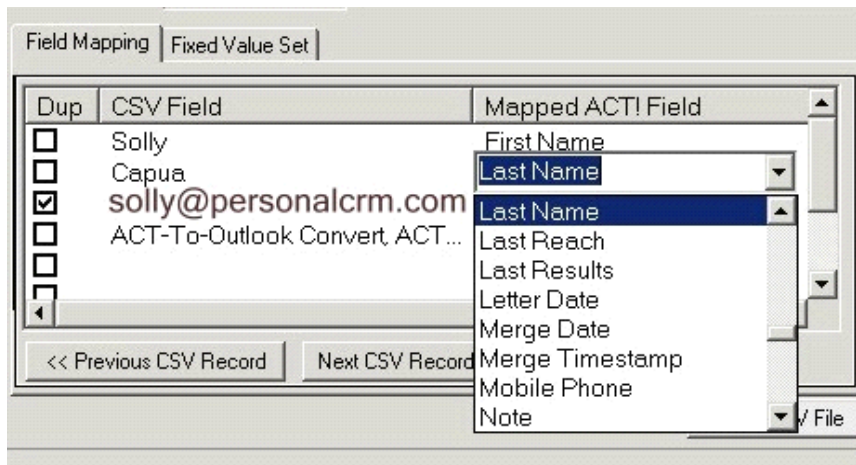
As in most merges, we do not want to import duplicate records as well as records with the same email address.

A couple of things we want to control:

- We do not want to import contacts with Empty Email Addresses. To prevent this, we check the **Ignore Records with Empty Dup Field Option (on the main screen)**
- We do not want any duplicate contacts with the same email i.e. check the dup check box in the matched email address field

- We want to add a new contact if the contact does not exist. Uncheck the **Do Not Create Contacts Option**
- We do not want to update existing contacts. Uncheck the **Update Contact if Found Option**

Click on the Previous or Next CSV Record to find a record that has all the fields.



In the above example, we want to import contacts for a mail merge. We match the following fields:

1. Solly. We match this field to be the First Name in the database.
2. Capua. We match this field to be the Last Name in the database.
3. solly@personalcrm.com. We match this field to be the Email Address in ACT! In addition, we check the Dup check box for that field so that we do not get any duplicate contacts with the same email.
4. We match the fourth field to a user defined field named Product.

Once the above is done, Press on Import CSV File and the data will be merged with the ACT! database.

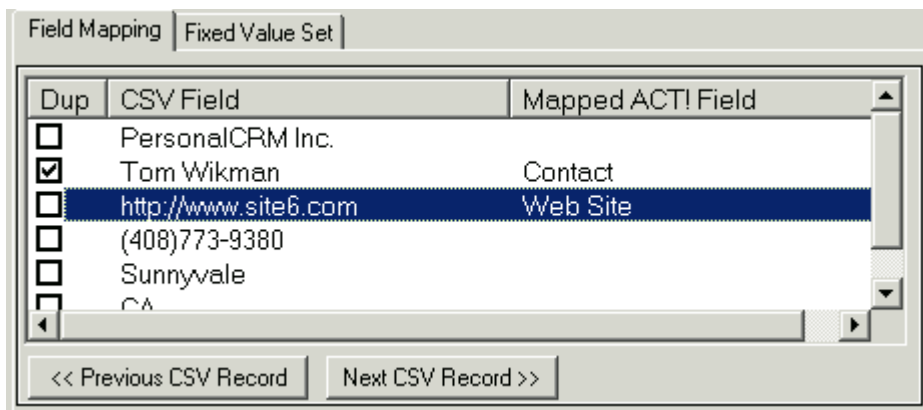
Variants on Mail Merge

- Selecting multiple fields in the merge map enables the merge to update multiple ACT! fields in one merge.
- You can choose any field for duplicate checking, including last name of the full contact name.
- Using different variations of the duplicate checking flags, you are able to either update just current contacts or merge the full database.
- Unchecking the duplicate check box indicates to CSV Fast Import that no duplicate checking is to be done and merge the records sequentially. Faster merge speeds result. However, if there are duplicate records, nothing will be done.

5.2 Updating Contacts with CSV File

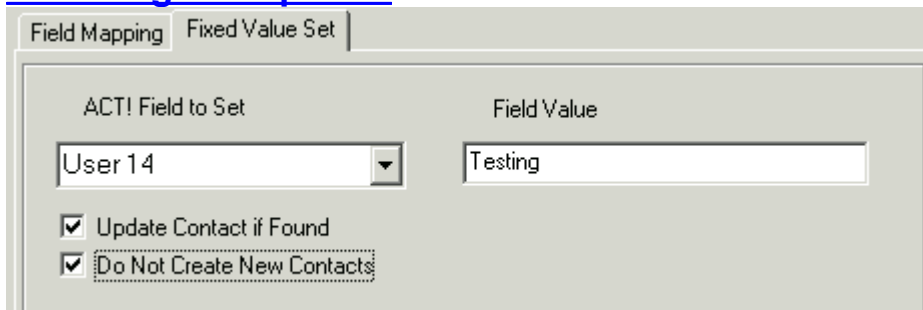
Sometimes you want to update an ACT! database with data from a CSV file but do not want to add any new contacts to the database. For example, you want to update all the web site information for a range of contacts.

Selecting the fields



In the screen above, we only want to update the web site for the contacts that match the contact full name.

Selecting the Options



Here, we have chosen to set:

- User 14 field to Testing for every contact that is updated.
- [Update Contact if Found \(checked\)](#). When a contact is found to match the full name, the web address is updated.
- [Do Not Create New Contacts \(checked\)](#). If a contact is not found, do not create a new contact. Otherwise we'll get a whole bunch of contacts that only have the full name and the web address.
- [Ignore Records with Empty Dup Field \(checked\)](#). Here, any records with an empty dup field is ignored.

Press Import CSV File to Process.

Variants on Update

- If you select all the fields in the contact, you can update all the selected fields for the contacts that are found.
- Using the ACT! Field Set, you can set a particular field to a value that reflects the import you are performing.
- Unchecking the Update Contact if Found, will indicate to CSV Fast Import to just ignore the record if it is found

5.3 Only Adding New Records

An interesting twist with CSV Fast Import for ACT! is that you can set it up to only add records to the database that did not exist there before i.e. only adding new records.

To only add new records on a merge, set the following flags:

Field Mapping Fixed Value Set

ACT! Field to Set: User 14

Field Value: Testing

Update Contact if Found

Do Not Create New Contacts

We just set the User 14 flag for convenience. However, unchecking Update Contact if Found and Do Not Create New Contacts instructs CSV Fast Import to only add the contacts that it does not find a duplicate for.

5.4 Disabling Duplicate Checking

Sometimes, you want to import data unencumbered and without duplicate checking or any checking whatsoever. To do this, click on the Dup check box and leave it unchecked. This will disable duplicate checking altogether (as shown below).

Field Mapping Fixed Value Set

| Dup | CSV Field | Mapped ACT! Field |
|--------------------------|----------------------|-------------------|
| <input type="checkbox"/> | PersonalCRM Inc. | |
| <input type="checkbox"/> | Tom Wikman | Contact |
| <input type="checkbox"/> | http://www.site6.com | Web Site |
| <input type="checkbox"/> | (408)773-9380 | |
| <input type="checkbox"/> | Sunnyvale | |
| <input type="checkbox"/> | CA | |

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End of Printed Manual