

CSV Professional Import for ACT!

Designed for ACT!

Print Manual

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CSV Professional Import for ACT!

Import CSV Data into ACT! Fast!

by *PersonalCRM Inc.*

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CSV Professional 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.

Table of Contents

Foreword	1
Part I Welcome	3
Part II Introduction	6
1 Why Use CSV Professional Import	6
2 Help on CSV Professional Import for ACT!	7
3 What is New With V5.0	8
4 How to Buy CSV Professional Import for ACT!	9
Part III Installation	11
1 CSV Professional Import Compatibility	11
2 Registration	12
3 End-User License Agreement	14
4 Uninstall	15
Part IV Running CSV Professional Import	17
1 The Main Screen	18
Selecting a CSV File	18
Matching CSV Fields to ACT! Fields	19
Duplicate Checking	20
Serial Import	21
2 Set Value and Merge Options	22
3 Contact Note/History Creation	25
4 Other	25
5 Saving Field Maps and Batch Jobs	26
6 Read Only Fields	26
7 Background Processing	27
Part V Tips and Tricks	29
1 Keeping ACT Open	29
2 Merge a CSV File	29
3 Updating Contacts with CSV File	30
4 Only Adding New Records	31
5 Disabling Duplicate Checking	32
Index	33

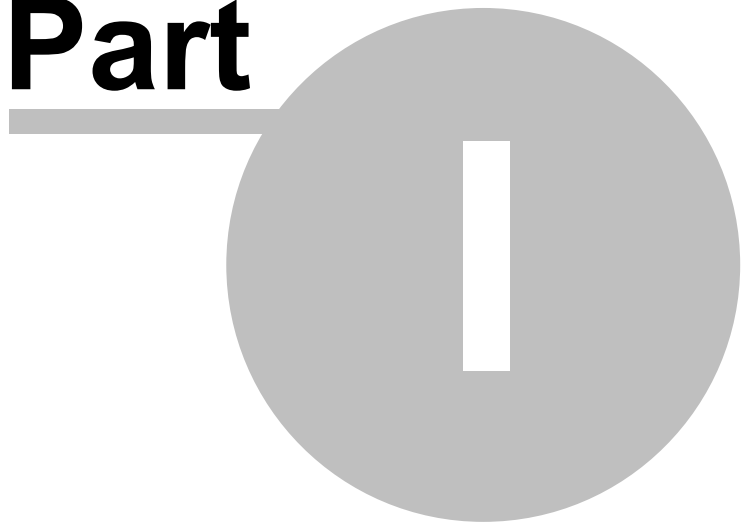
Foreword

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

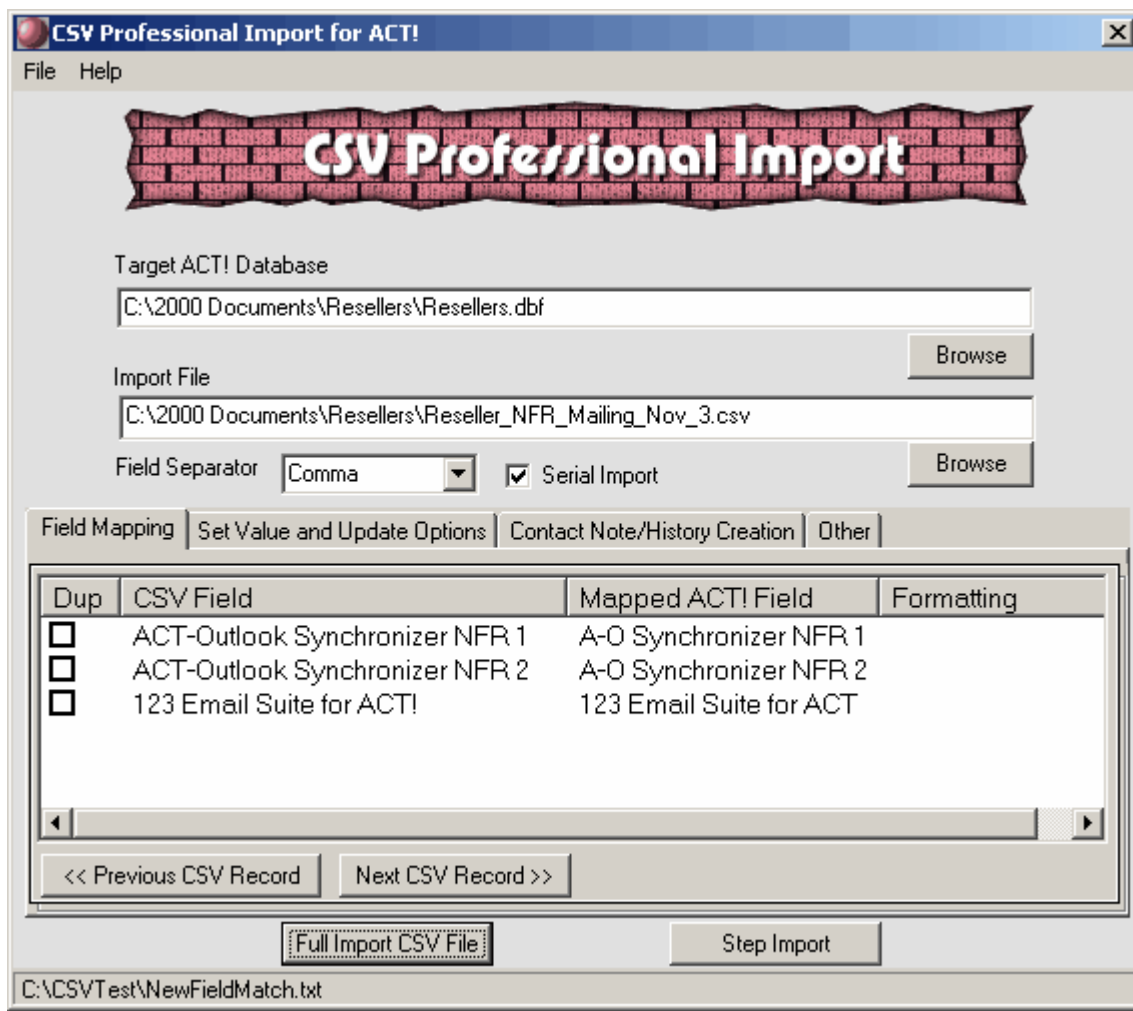
CSV Professional Import for ACT!

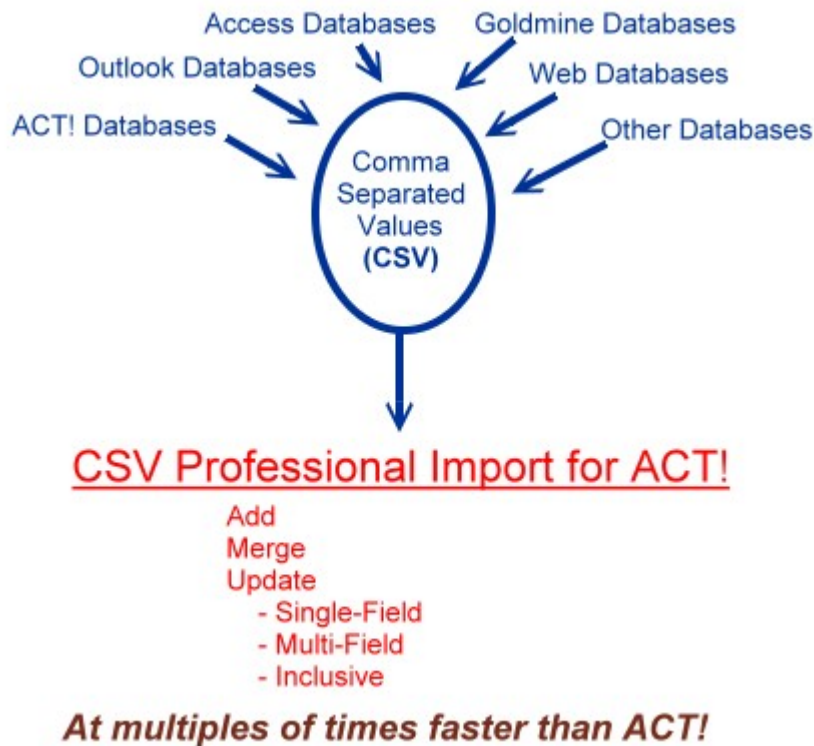
Import CSV Data into ACT! Fast!

Part



1 Welcome





Welcome to [CSV Professional 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 Professional 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 Professional 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 Professional 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....**

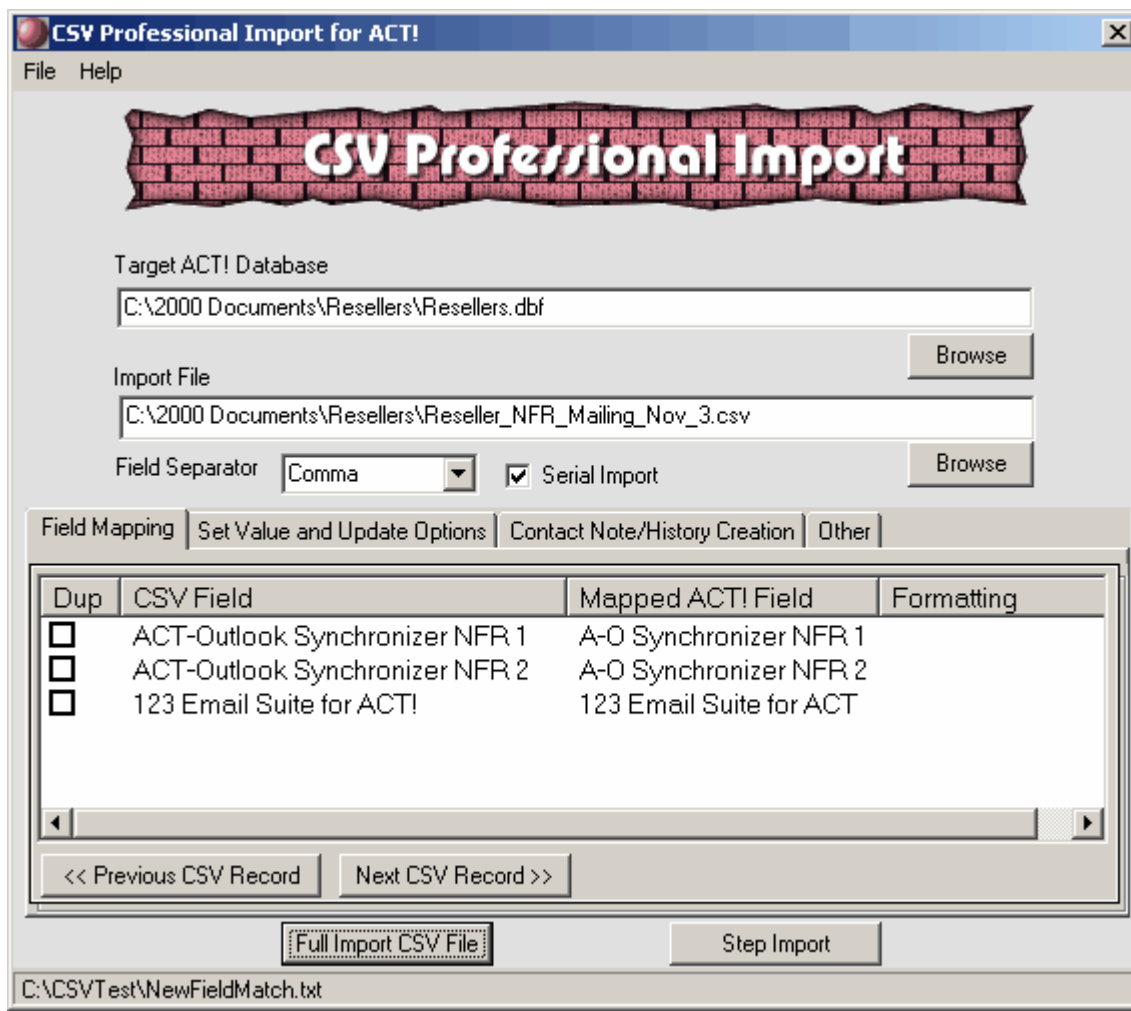
CSV Professional Import for ACT!

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2 Introduction



The purpose of CSV Professional 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 Professional Import for ACT! to do its work unhindered i.e. you can spend your time doing others tasks while CSV Professional Import does the work.

2.1 Why Use CSV Professional Import

CSV Professional 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 Professional 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 Professional 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 than 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 Professional Import to ignore, hence, do not create unnecessary contacts.

2.2 Help on CSV Professional Import for ACT!

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

- **The help file shipped with the product.** The help file provided with CSV Professional Import for ACT is the most recent help file when this version of CSV Professional 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 Professional 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 Professional 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 V5.0

Version 3.5.3 of CSV Professional 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.
- **Enhanced Duplicate Support.** Unlimited contact duplicate fields supported so that you can find a contact by an email address or from a variety of matches from Name to phone number, etc..
- **Field Differential Update Management.** Manage which fields are updated and when they are updated. Avoid updating fields unless they have been changed or are new in the data.
- **Enhanced Email Support.** Not only find duplicates depending on email address, but you can also update contact emails via the update matching on the contact names, customer id, etc..
- **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 Professional 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 Professional Import for ACT!



CSV Professional 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

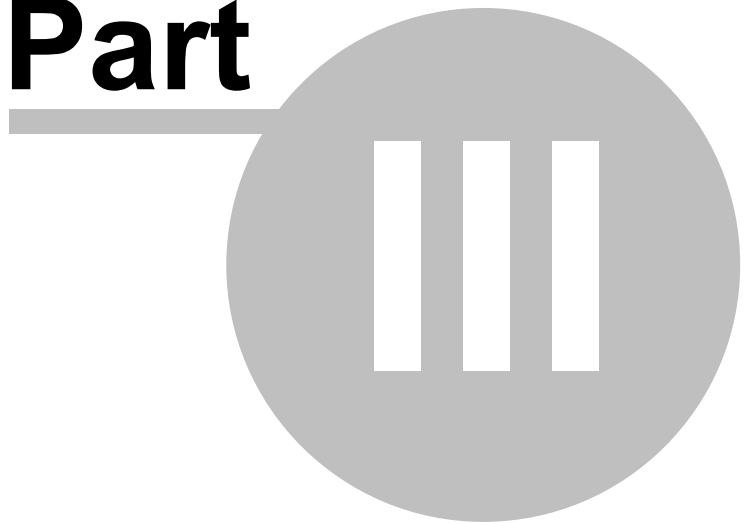
Fax

USA: (240)220-3244

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3 Installation

Installation of CSV Professional 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 Professional Import for ACT! executable and follow the directions to install the program.

Sub-topics

CSV Professional Import for ACT! Compatibility

Lists the system with which CSV Professional Import is compatible with

License Registration

Instructions on the procedures on registering eConvert

End-User License Agreement

Uninstall

3.1 CSV Professional Import Compatibility

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

ACT! 2000/6.0 compatibility

CSV Professional 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 Professional 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 Professional 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 Professional Import is fully compatible with ACT! 6.0

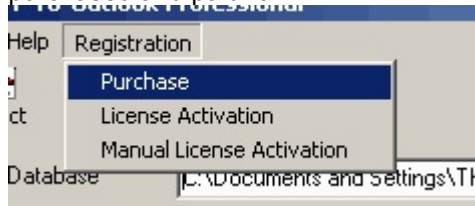
Operating System Compatibility

CSV Professional 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 Professional Import for ACT!**

To purchase CSV Professional 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.

**CSV Professional Import for ACT! Registration**

When you purchase CSV Professional 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.

 A dialog box titled 'License Activation' with the subtitle 'Enter License Key'. It contains four input fields: 'Name' (with placeholder 'Enter name'), 'Company' (with 'PersonalCRM'), 'Email Address' (with 'personalcrm@personalcrm.com'), and 'License' (with '1234-1223-1234-1234'). At the bottom are 'Cancel' and 'Register' buttons.

To activate, enter the license in the Registration->License Activation screen. This will register your software with PersonalCRM's License Registration Server and enable your product.

The license provided to you will only work on 1 computer. If you attempt to activate the software on another computer, the license server will not allow that.

Registration Problems

To register, CSV Professional Import for ACT! sends a registration request to a license server. In some cases, this registration request is blocked by a firewall. You'll get a message like "Connection was forcibly interrupted" or "Failed to Connect". When such even happens, do the following:

1. Click on the Help->Manual License Registration
2. Enter the registration details and instructions to activate the product will be sent to you via email.

3.3 End-User License Agreement

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

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3.4 Uninstall

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

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

[A Few Things](#)

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

CSV Professional Import for ACT!

Import CSV Data into ACT! Fast!

Part IV

4 Running CSV Professional Import

CSV Professional Import for ACT! is run by selecting the [Start->CSV Professional 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 Professional 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.

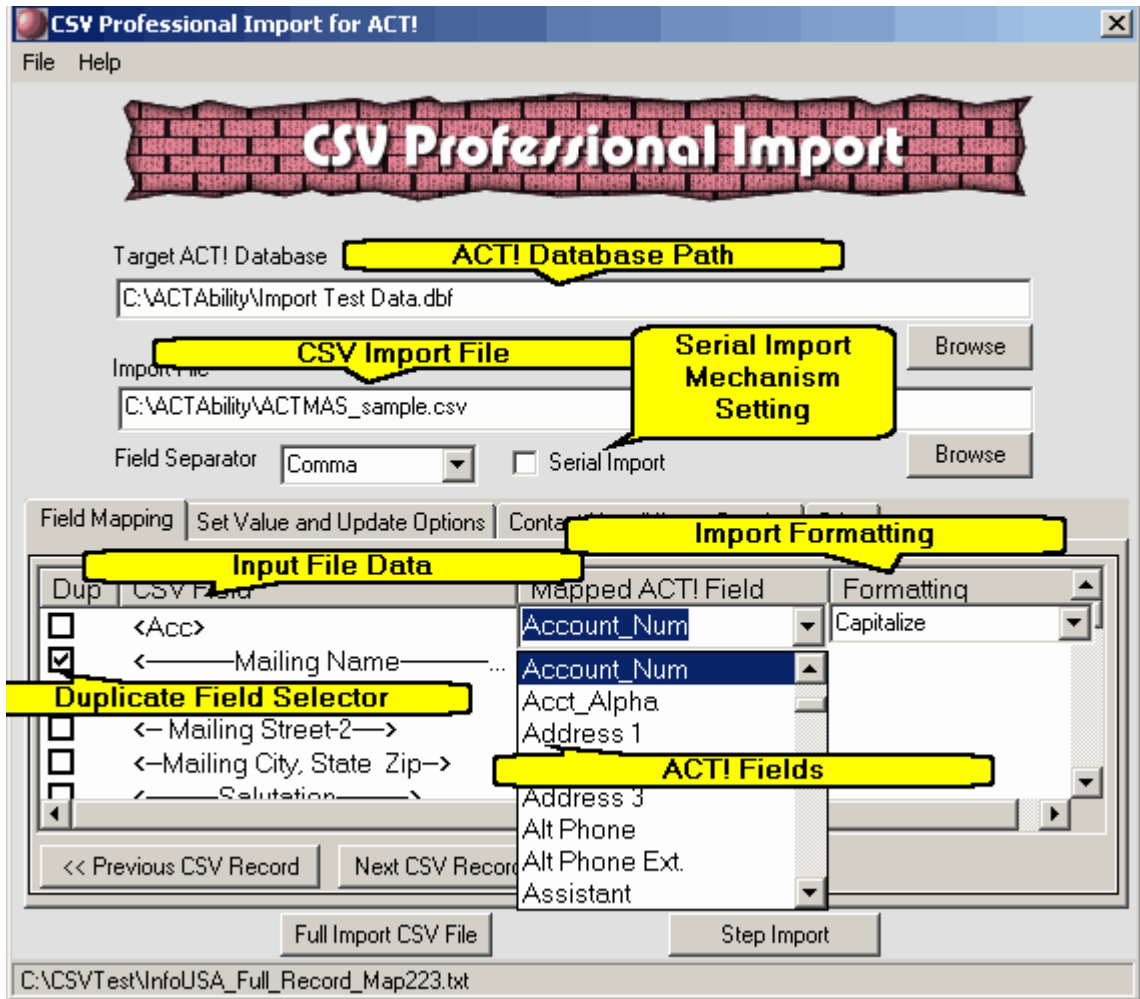
Matching CSV Fields to ACT! fields

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



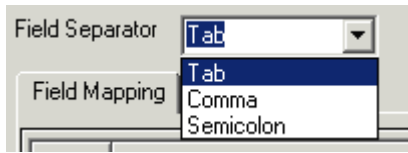
The main screen indicates the data target and source.

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 Professional 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 Professional 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](#)



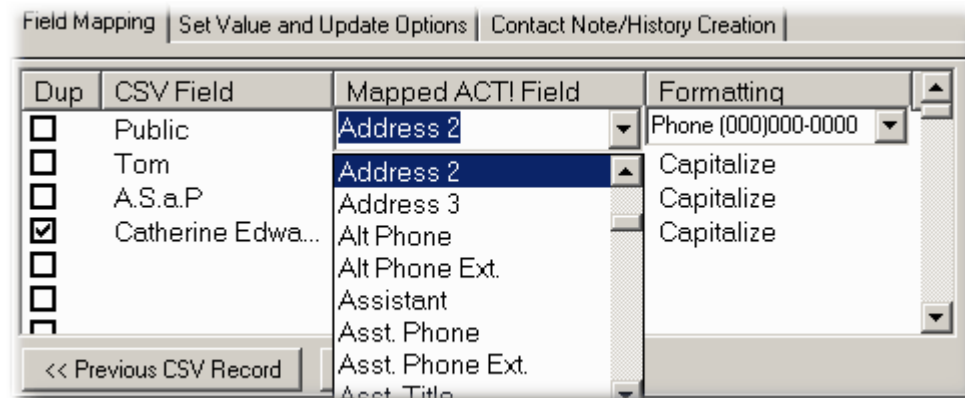
Click on the browse button if you want to search for the file on the system. Click OK when you have found the CSV File.

When the CSV file is selected, CSV Professional 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

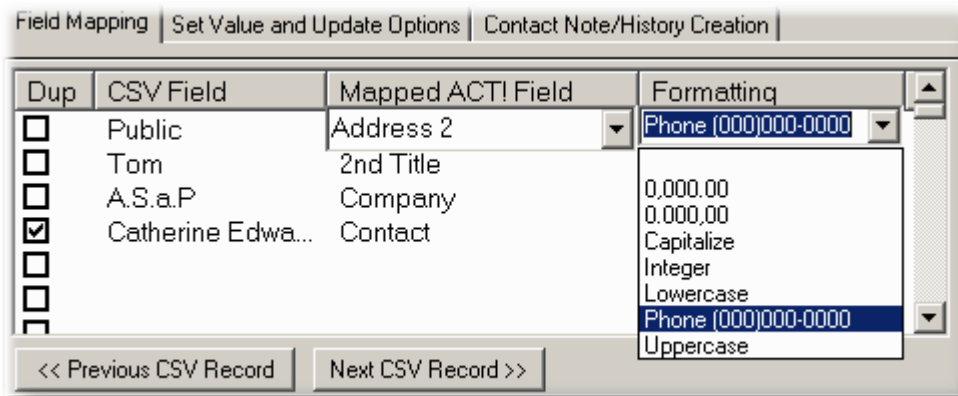
When the CSV file is selected, CSV Professional Import scans the first record and displays the record values in the fields list. You can go to the next record if you need more information about the record fields.

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.



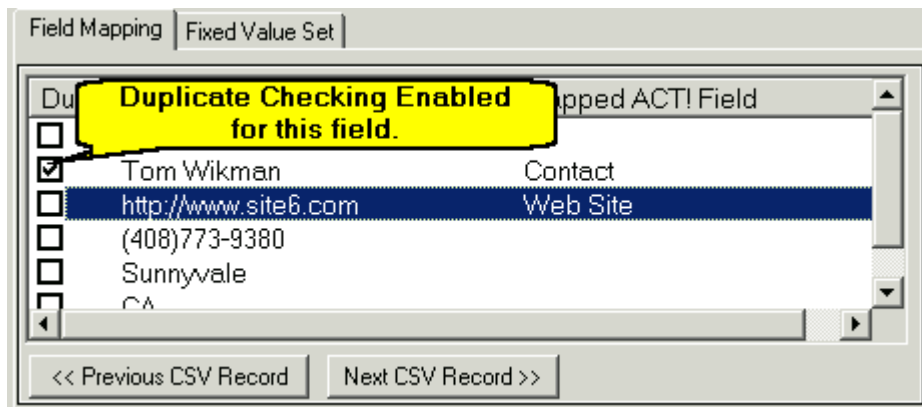
The following conversion formatting is currently performed:

- 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.

4.1.3 Duplicate Checking



CSV Professional Import provides two concurrent ways of duplicate checking:

- **Email Address**. Email addresses are considered unique. Hence, when you use the email address as a duplicate checker, when a match is made, the check is valid.
- **Contact Fields (excluding Email Addresses)**. CSV Professional Import supports unlimited contact field duplicate checking capabilities. That's right, you can have as many contact fields as you want to check for duplicates. You can use either the OR or the AND operation to match the fields selected in the contact. If the fields match and the value of the Duplicate Checking Operation using the operand that has been set is true, then a duplicate has been found.

ACT! Field to Set: []

Field Value: []

Update Options:

- Update Contact Record if Found
- Do Not Create New Contacts

Note/History Creation Options:

- Only Add Contact History Entries

Update Checking Operation: [OR]

Contact multi-field checking operand

Updating Contacts Options

Field Mapping | Set Value and Update Options | Contact Note/History Creation

ACT! Field to Set: [User 8]

Field Value: [Test]

Update Options:

- Update Contact Record if Found
- Do Not Create New Contacts

Note/History Creation Options:

- Only Add Contact History Entries

Overwrite Settings: [Overwrite only empty fields in the Destination]

Update Options when importing data into existing contacts

CSV Professional Import provides users with 4 options to update contacts in the ACT! Database:

- **Overwrite all fields in the Destination.** This option instructs the software to overwrite all the fields in the destination record. If the source field is blank, the destination field is blank as well.
- **Overwrite only empty fields in the Destination.** When set, only fields that are empty in the destination record are overwritten with data. If there is any data on the destination field, the source field data is not imported.
- **Ignore empty Source record fields.** When set, if the source field is empty (with no data or spaces), the field is then ignored in the import of the record.
- **Overwrite Destination only when Destination value is different from Source.** Only when the values are different, does the record get modified.

4.1.4 Serial Import

Serial Import is a strange but usefull option. Imagine that you have a set of unique numbers that you want to import to each record in a database. For example, we wanted to send out an email to all our Resellers and we wanted to provide each reseller with a unique license code for one of our products. We had all the resellers in our database and had all the serial numbers in a CSV file as shown in the example below:

<u>ACT! Contact Database</u>	<u>License File.CSV</u>
Contact 1	231094809
Contact 2	213094098
Contact 3	320498019
Contact 4	479821370
Contact 5	123470912
Contact 6	123948709
Contact 7	123409823
Contact 8	123047098
Contact 9	487987039

So we wanted to copy a set of numbers (in our case it was 3) to specific fields for all the contacts in ACT!.

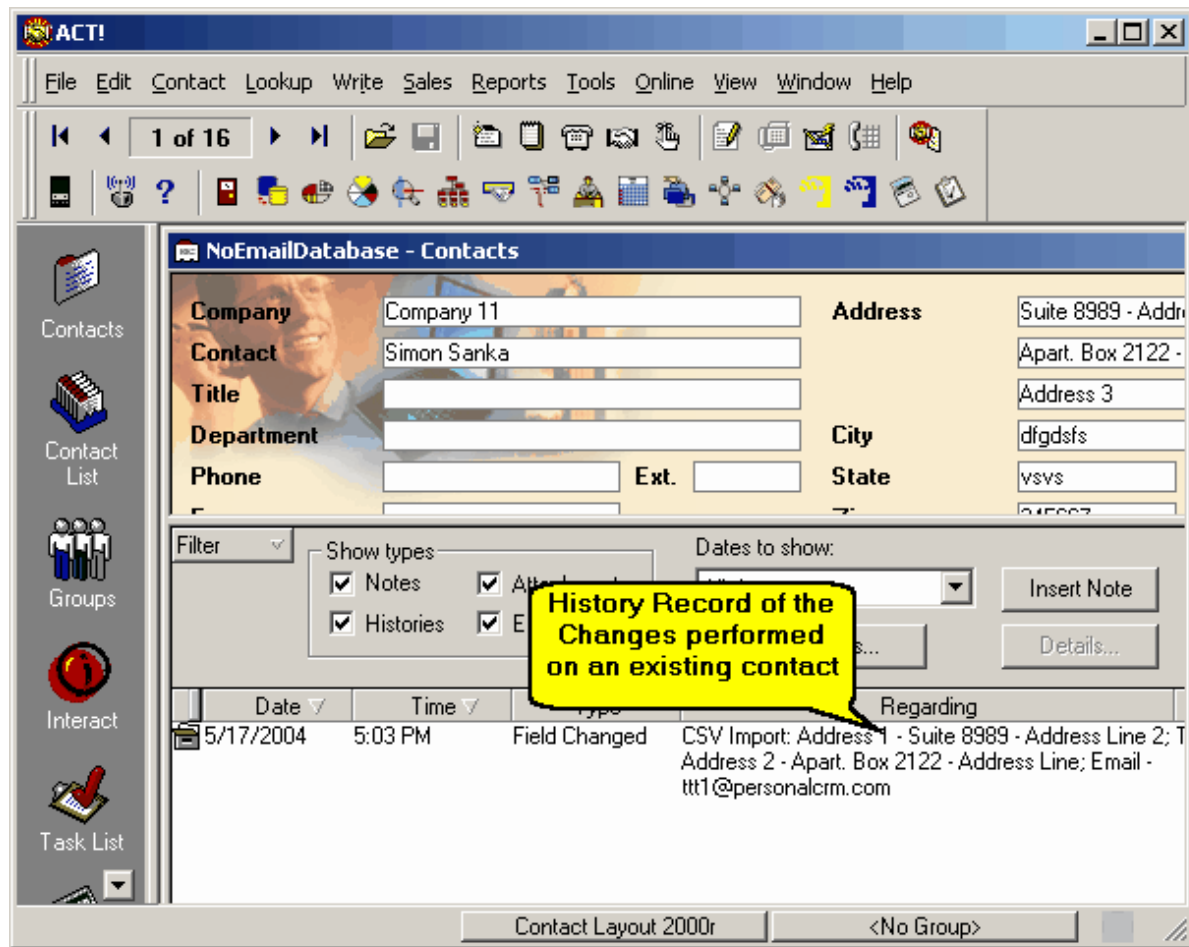
When Serial Import is enabled, that is what happens. It goes through the whole database and in serial fashion, imports all the serial numbers to the fields specified in the import field matching. When using serial import,

you cannot have duplicate checking enabled since it is a serial import and Update Contact Record if Found has to be set.

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. **Current Date.** When enabled, it will set the ACT! Field to Set to the date the import was started i.e. the date is the same for all records that are imported/updated. Current Date overrides the field value that is specified.
3. **Update Contact if Found.** If a contact is found using the duplicate field set, it is then updated accordingly. Only the fields setup is updated.
 - 2.a. **Create Changed Fields History.** This instructs the software to create a history record in the contact when fields are updated in the contacts



3. **Email Options. Exclude Contacts From the Same Domain Name.** When the Email Field is checked, any contact with the same email domain is excluded from the import.
4. **Do Not Create New Contacts.** When importing the data, if a contact is not found, CSV Professional Import will not add a new contact. It will ignore that record and go to the next.
5. **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.

[Duplicate Checking Options in Set Value and Merge Options](#)

Field Mapping | **Set Value and Update Options** | Contact Note/History Creation

ACT! Field to Set: Use [Field Value] [Imported Data] Current Date

Contact Multi-Field Operand

Update Options

Update Contact Record if Found Create Changed Fields History Do Not Create New Contacts

Contact Duplicate Fields Operand: AND

Overwrite Settings: Overwrite all fields in the Destination

Email Options

Exclude Contacts From Same Email Domain Name

Note/History Creation Options

Only Add Contact History Entries

Updating Contacts Options

Field Mapping | **Set Value and Update Options** | Contact Note/History Creation

ACT! Field to Set: Use [Field Value] [Imported Data] Current Date

Update Options when Importing Data into Existing Contacts

Update Options

Update Contact Record if Found Create Changed Fields History Do Not Create New Contacts

Contact Duplicate Fields Operand: AND

Overwrite Settings: Overwrite all fields in the Destination

Email Options

Exclude Contacts From Same Email Domain Name

Note/History Creation Options

Only Add Contact History Entries

CSV Professional Import provides users with 4 options to update contacts in the ACT! Database:

- **Overwrite all fields in the Destination.** This option instructs the software to overwrite all the fields in the destination record. If the source field is blank, the destination field is blank as well.
- **Overwrite only empty fields in the Destination.** When set, only fields that are empty in the destination record are overwritten with data. If there is any data on the destination field, the source field data is not imported.
- **Ignore empty Source record fields.** When set, if the source field is empty (with no data or spaces), the field is then ignored in the import of the record.
- **Overwrite Destination only when Destination value is different from Source.** Only when the values are different, does the record get modified.

4.3 Contact Note/History Creation

CSV Professional Import for ACT!

File Help

CSV Professional Import

Target ACT! Database
C:\ACTAbility\Import Test Data.dbf Browse

Import File
C:\ACTAbility\ACTMAS_sample.csv Browse

Field Separator Comma Serial Import Browse

Field Mapping | Set Value and Update Options | **Contact Note/History Creation** | Other

Create a Contact Note/History

Fixed Note Import of Email addresses

Note From CSV Field

Field Value

BUS. PHONE

SINCE

SAL

FAX

Full Import CSV File Step Import

C:\CSVTest\InfoUSA_Full_Record_Map223.txt

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.

4.4 Other

Ignore Records with Empty Dup Fields

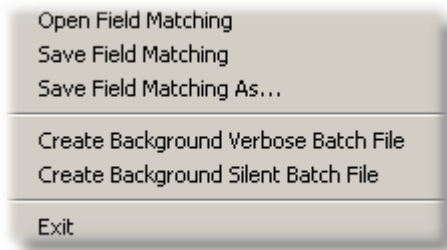
Ignore First Line in CSV File

Country Code 1

- **Ignore Records with Empty Dup Fields.** This option instructs CSV Professional Import to ignore any records that have empty duplicate field identifiers.
- **Ignore First Line in CSV File.** The first line usually has the field name definitions that you do not want to import. This option, when enabled, instructs CSV Professional Import to skip the first line from an import source.
- **Country Code.** Enter the country code for which the ACT! database is set to. This ensures that the comparison algorithm for the phone numbers works as programmed.

4.5 Saving Field Maps and Batch Jobs

Every and all field maps can be saved with CSV Professional 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 Professional Import for ACT!
- **Safe 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.

4.6 Read Only Fields

The following fields are not available in ACT! to be overwritten either because they are read only from the database or because they are obsolete:

Field Name	Field ID	Reason
Unique ID	1	Read Only - Supplied by the system
Create Timestamp	2	Read Only - Supplied by the system
Edit Timestamp	3	Read Only - Supplied by the system
Merge Timestamp	4	Read Only - Supplied by the system
Record Manager	6	Read Only - Supplied by the system
Last Meet	41	Read Only - Supplied by the system
Last Reach	42	Read Only - Supplied by the system
Last Attempt	43	Read Only - Supplied by the system
Letter Date	44	Read Only - Supplied by the system
Creator	90	Read Only - Supplied by the system
ALT1Reach	92	Read Only - Supplied by the system
Alt2Reach	93	Read Only - Supplied by the system
Note	201	Obsolete
Email Logon	202	Obsolete
Email Carrier	203	Obsolete

4.7 Background Processing

Background Processing or more aptly, Command Line processing has been introduced into CSV Professional 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 Professional Import Executable. The parameters are as follows and must be passed in the following order:

- -B - Indicates CSV Professional 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 Professional Import.
- -V - Indicates CSV Professional 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.

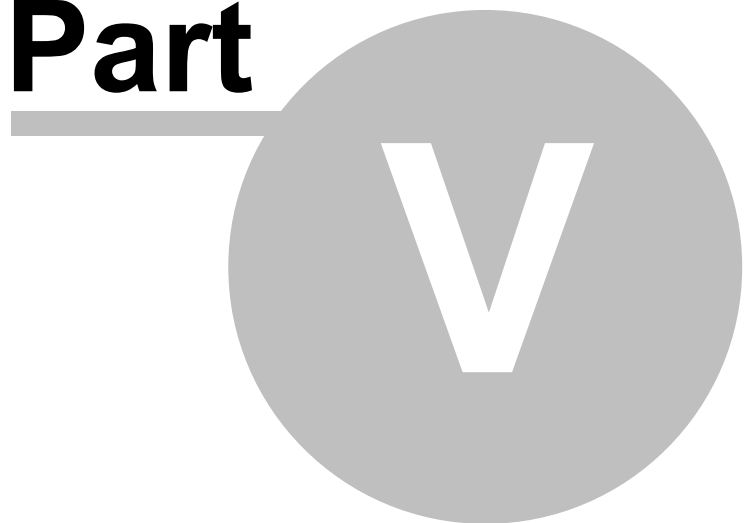
The best way to see how these commands are setup is to use the Batch Saving option in the File menu.

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

CSV Professional Import for ACT!

Import CSV Data into ACT! Fast!

Part



5 Tips and Tricks

The examples below lists a few of the applications of CSV Professional 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 Professional 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 Keeping ACT Open

Do not keep ACT! open when you use CSV Professional Import. If you are updating records, ACT! will overwrite the data that has been transferred to the database with cached data, invalidating updates to database records. Hence, when using (and testing) CSV Professional Import, keep ACT! closed.

5.2 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.

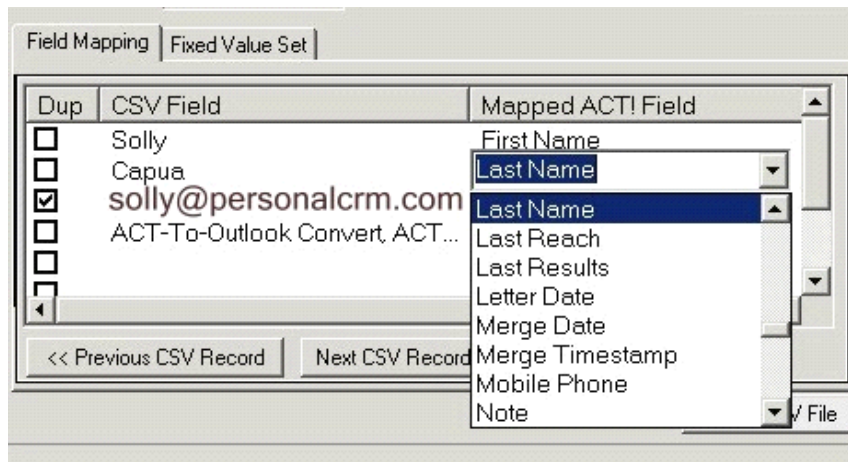
A couple of things we want to control:

- [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

The screenshot shows a dialog box with two tabs: 'Field Mapping' and 'Fixed Value Set'. The 'Field Mapping' tab is active. It contains two columns: 'ACT! Field to Set' and 'Field Value'. Under 'ACT! Field to Set', there is a dropdown menu with 'User 14' selected. Under 'Field Value', there is a text box containing 'Testing'. Below these fields, there are two checkboxes: 'Update Contact if Found' (checked) and 'Do Not Create New Contacts' (unchecked).

- [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.

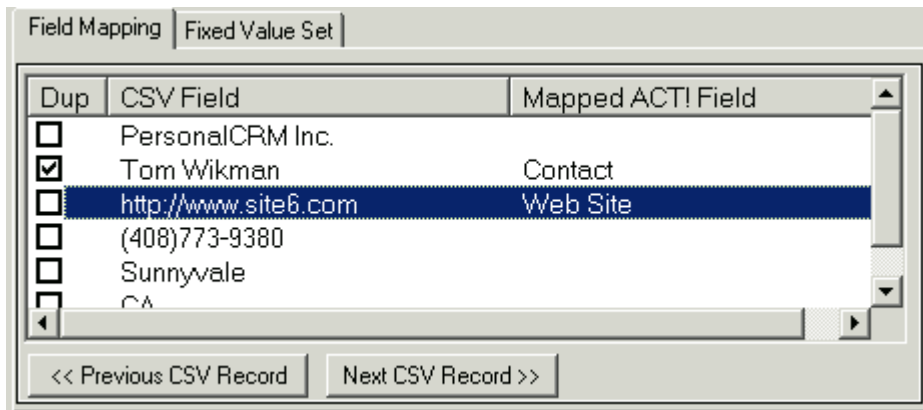
Variants on Mail Merge

- 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 Professional 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.

5.3 Updating Contacts with CSV File

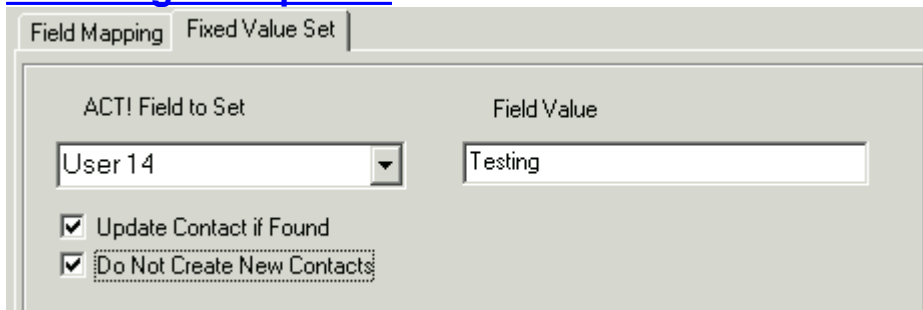
Sometimes you want to update an ACT! database with data from a CSV file but do not want to add any new contacts to the database. For example, you want to update all the web site information for a range of contacts.

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 Professional Import to just ignore the record if it is found

5.4 Only Adding New Records

An interesting twist with CSV Professional 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 Professional Import to only add the contacts that it does not find a duplicate for.

5.5 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	

Index

- A -

ACT 11
ACT! Field To Set 22
Activate 12
Advantages of CSV Fast Import 3

- B -

Background Execution 26
Background Processing 27
Batch Files 26
Best Import 6
Buy 9

- C -

Comma Delimited Value 3
Comma Separated Value 18
Command Line Processing 27
Compatibility 11
Contacts 30
Create a note in ACT! 25
CSV 3, 18
CSV Fast Import Main Screen 18
CSV Merge 29
Current Date 22

- D -

Data Merge 29
Disabling Duplicate Checking 29, 32
Download 11
Duplicate 31, 32
Duplicate 19
Duplicate Checking 20, 32
Duplicate Options 22
Duplicate Records 19

- E -

Examples 29

- F -

Features 8
Field Rematching 19
Field Set Value 22
Field Value 22
Fields 19
Fields Not Available 26
Format 19

- H -

Help 6, 7
How to Register 12
how to use help 7

- I -

Ignore first line 25
Ignore records with empty dup fields 25
Importing Notes/History 25
Installation 11
Introduction 6

- L -

Latest Release 11
License 12
License Agreement 14
License Number 12

- M -

Main 18
Main Features 6
manual 7
Matching Fields 19
Merge 22, 29
Merge a CSV File 29
Merge Options 22
more help 7

- N -

New 8

New Records 31
 Note/History 25

- O -

Only add new contacts 29
 Only New Records 31
 Options 22
 Overwrite only empty fields in the Destination 20
 Overwrite all fields in the Destination 20

- P -

print manual 7
 Profiles 26
 Purchase 9

- Q -

Quick Start 17

- R -

Read Only Fields 26
 Records 31
 Registration 12
 Remove 15
 Running CSV Fast Import 17

- S -

Saving Profiles 26
 Selecting a CSV File 18
 Selecting Formatting 19
 Serial Import 21
 Serial Number 12
 Speed Improvements 6
 support 7

- T -

Technical Support 7
 The Main Screen 18
 Tips and tricks 29

- U -

Uninstall 15
 Unlock Code 12
 Update 30
 Update Contacts 29
 Updates 11
 Updating Contacts 20, 30
 Upgrade 11
 Using ACT! when using CSV Fast Import 29
 Using CSV Fast Import 17

- V -

Version 11

- W -

Welcome 3
 What's New 8
 Where to buy 9
 Where to Purchase 9
 Why 6
 Why Use CSV Import 6

End of Printed Manual