

Outlook-To-ACT Migration Professional

Migrate all your Outlook data to ACT!

Printed Manual

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Outlook-To-ACT Migration Professional

Migrate your Outlook contacts into ACT!

by *PersonalCRM Inc.*

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Outlook-To-ACT Migration Professional

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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	5
1 Why Use Outlook-To-ACT Migration Professional	5
2 Help on Outlook-To-ACT Migration Professional	6
3 What is New With V6.0	7
4 How to Buy Outlook-To-ACT Migration Professional	8
Part III Installation	10
1 Compatability	10
2 Registration	11
3 End-User License Agreement	13
4 Uninstall	14
Part IV Running Outlook-To-ACT Migration Professional	16
1 File Menu	17
2 Help Menu	18
3 Conversion Buttons	18
Select Contacts	19
Convert All Contacts	19
4 Tabs	19
Outlook Folders	20
Conversion Options	20
Contact Fields	22
Filters	24
Activities	25
5 Performance	25
6 ACT and Outlook Fields	25
Part V Tips and Tricks	27
1 Phone Numbers	27
2 Journal	27
Index	28

Foreword

*The best of both worlds! Outlook
and ACT! Aaahhh.....*

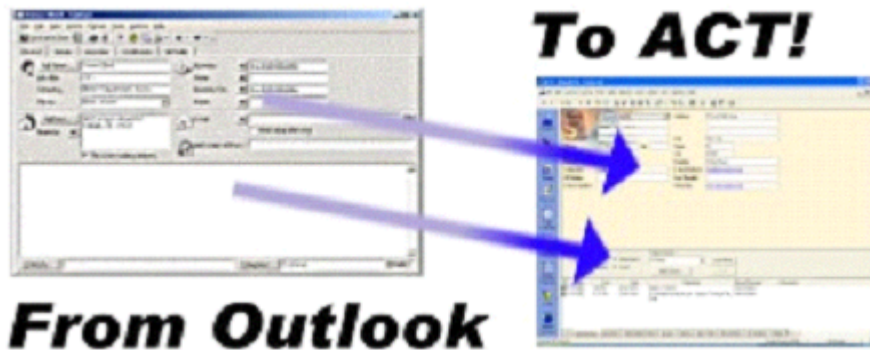
Outlook-To-ACT Migration Professional

Bring over your contacts!!!

Part



1 Welcome

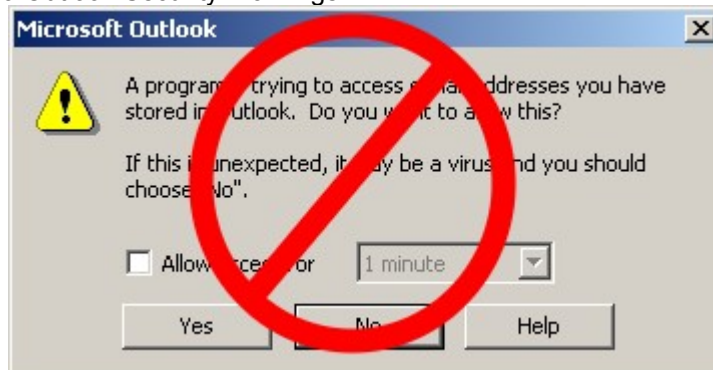


Welcome to **Outlook-To-ACT Migration Professional!**
The most complete tool to create an image of your Outlook Database in
ACT!

Compatible with ACT! 2000 and 6.0 and Outlook 2000, 2002, and 2003

With **Outlook-To-ACT Migration Professional** you'll be able to:

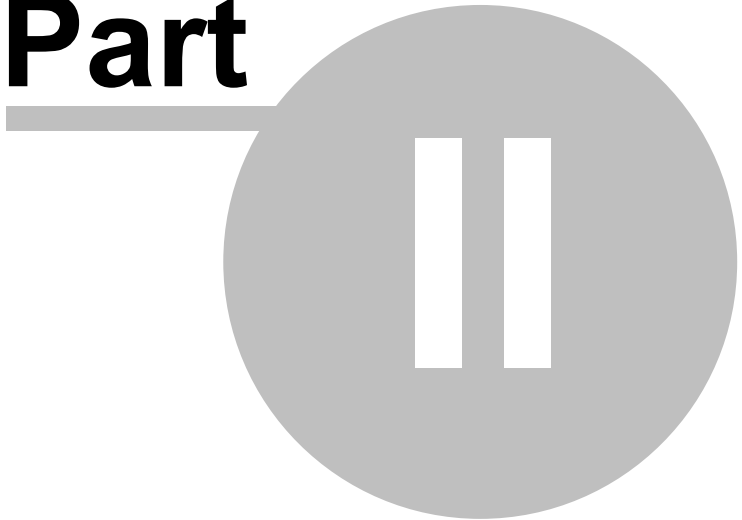
- Migrate an unlimited number of contact from Outlook into ACT!
- Maintain all the tasks (todo's), appointments, journal items, attachments, etc..
- Effortlessly bring over any amount of data from Outlook into ACT!
- Guarantee that all the data in Outlook is properly mapped, transferred, and represented in ACT! in useable form.
- Convert User Defined Fields in Outlook into ACT! fields
- Convert the following activities from Outlook:
 - Tasks - Convert them into ACT! Todo's
 - Appointment - Convert them into ACT! Meetings
 - Quick Notes - Convert them into Outlook Notes.
 - Journal - Convert Outlook Journal entries into ACT! History/Notes, including emails and attachments
- Full support for Outlook Local and Exchange Public Folders
- Outlook-To-ACT Professional converts the whole database in one click. Our innovative Outlook Warning Suppression mechanism ensures that your conversion only stops when all contacts are converted
- Last but not least, leave your computer and let Outlook-To-ACT Migration Professional do the job.
- No Outlook Security Warnings!



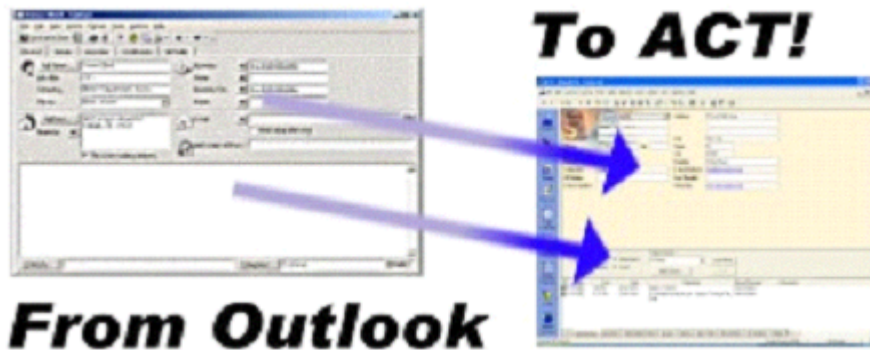
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Bring over your contacts!!!

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2 Introduction

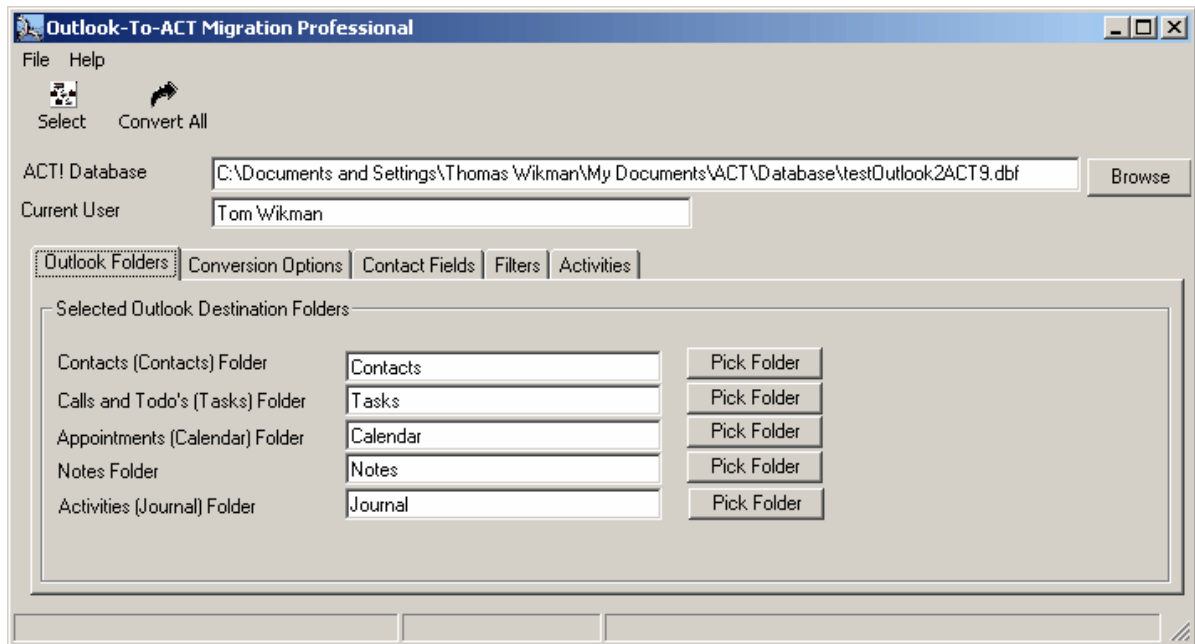


The purpose of Outlook-To-ACT Migration Professional is to migrate Outlook databases to ACT!, including groups, activities, journals, and custom fields.

Sub Topics

- Why use Outlook-To-ACT Migration Professional
- Help on Outlook-To-ACT Migration Professional
- What is new with V4.0
- How to buy

2.1 Why Use Outlook-To-ACT Migration Professional



Outlook-To-ACT Migration Professional is the most comprehensive software program to bring over an Outlook database to ACT!.

Full Field Remapping

Don't lose any data on your conversion. Bring over all your custom user fields from Outlook to ACT!. Easy field remapping technology makes discovery and mapping of Outlook fields 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.

[Categories-To-Groups Mapping](#)

Map your Outlook categories into ACT! groups. Full update mapping of Group membership in ACT!

[Address Analyzer and Breakup](#)

Map all the fields in the Outlook Address to the corresponding ACT! fields

[Notes, Tasks, Calendar and Quick Notes transfer](#)

Bring what is essentially the whole database into related records in ACT!, including the notes for the contact.

[Intelligent Phone Number migration](#)

Bring over all the phone numbers from Outlook, including number in letter format i.e. 1-800-MY-PHONE to ACT!. In addition, our phone number analyzer identifies and maps phone number extensions to your ACT! database.

[Update matching contacts.](#)

Our proprietary contact matching allows you to always update the contact that is related to the Outlook contact. Once a match has been done, that contact has a 1-to-1 relationship with the Outlook Contact

2.2 Help on Outlook-To-ACT Migration Professional

You can obtain help for Outlook-To-ACT Migration Professional in the following ways:

- **The help file shipped with the product.** The help file provided with Outlook-To-ACT Migration Professional is the most recent help file when this version of Outlook-To-ACT Migration Professional 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.
- **Outlook-To-ACT Migration Professional Discussion Board.** Participate on PersonalCRM's discussion board free of charge and pose questions and exchange ideas with other users of Outlook-To-ACT Migration Professional. 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 outlook2actprosupport@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 V6.0

Version 4.0 of Outlook-To-ACT Migration Professional has added some key components that improve importing data into ACT!.

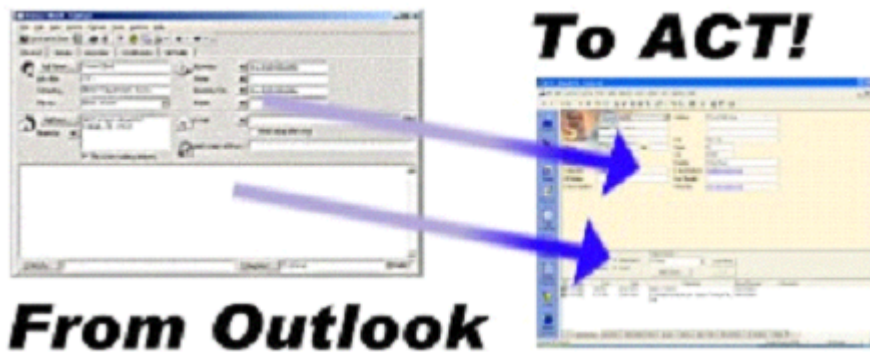
Major Features

- **Added support to import Outlook Journal entries.** The Outlook journal entries are attached to the contacts related to the entries.
- **Improved Help Functionality.** New local and web help eases the use of Outlook-To-ACT Migration Professional.
- **Event Selection Improvements.** Filter out which contact events you want to import by date and type.
- **Duplicate Actions.** We've speeded up duplicate finding. In addition, we've added 3rd string duplicate finding:
 1. Find duplicates by Full Name match.
 2. Find duplicates by Full Name and Company match.
 3. Find duplicates by Full Name, Company and City.
 4. Find duplicates by Full Name and City.
- **Outlook Filtering.** We've added the capabilities for users to filter which contacts in Outlook to convert.
- **Speed, speed, speed.** Multiple improvements in data management have been introduced to improve processing speed.
- **Installation.** Our installation now takes less than 1 minutes and you are up and running before you know it.
- **More Conversion Options.** Specialized phone number management, support for Outlook Alpha numbers, and full field remapping are now standard features.

Bugs Fixed

- Fixed the tagging mechanism for Appointments and Tasks which were rendering Outlook Appointments and Tasks into repetitive mode.
- Fixed the phone number parsing mechanism
- Fixed bringing over independent Journal Entries
- Fixed duplicate checker
- and much more....

2.4 How to Buy Outlook-To-ACT Migration Professional



Outlook-To-ACT Migration Professional is distributed worldwide by a variety of resellers and distributors.

To Purchase

Click on the Registration->Purchase menu option of Outlook-To-ACT Migration Professional and you will be taken to the purchase page for the product.

PersonalCRM Home page

<http://www.personalcrm.com>

Email support

support@personalcrm.com

Snail mail

PersonalCRM Inc.
891 Quetta Court
Sunnyvale, CA 94087

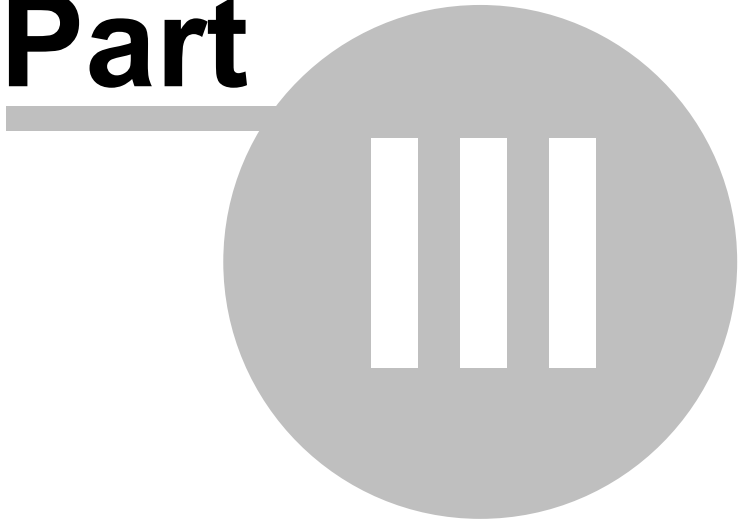
Fax

USA: (240)220-3244

Outlook-To-ACT Migration Professional

Bring over your contacts!!!

Part



3 Installation

Installation of Outlook-To-ACT Migration Professional 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 Outlook-To-ACT Migration Professional executable and follow the directions to install the program.

Sub-topics

Outlook-To-ACT Migration Professional for ACT! Compatibility

Lists the system with which Outlook-To-ACT Migration Professional is compatible with

License Registration

Instructions on the procedures on registering Outlook-To-ACT Migration Professional

End-User License Agreement

Uninstall

3.1 Compatability

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

ACT! 2000/6.0 compatibility

Outlook-To-ACT Migration Professional 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.

Outlook-To-ACT Migration Professional 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 Outlook-To-ACT Migration Professional 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 that 5.0.0.X which is the original release of ACT! 2000.

Outlook Compatibility

Outlook-To-ACT Migration Professional is compatible with Outlook 2000 SP-1 and above, 2002 and 2003

Operating System Compatibility

Outlook-To-ACT Migration Professional is compatible with the following Windows operating systems:

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

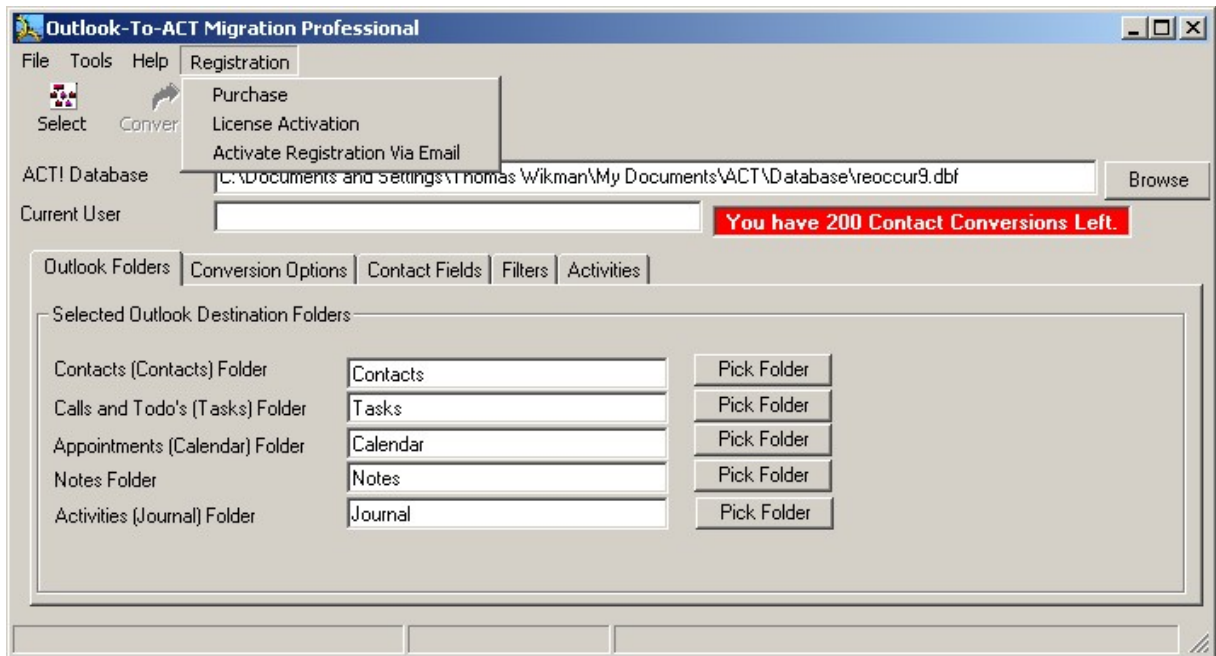
3.2 Registration

Purchasing Outlook-To-ACT Migration Professional!

To purchase Outlook-To-ACT Migration Professional, 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 Outlook-To-ACT Migration Professional, enter the license supplied with your purchase.

Activating your Outlook-To-ACT Migration Professional

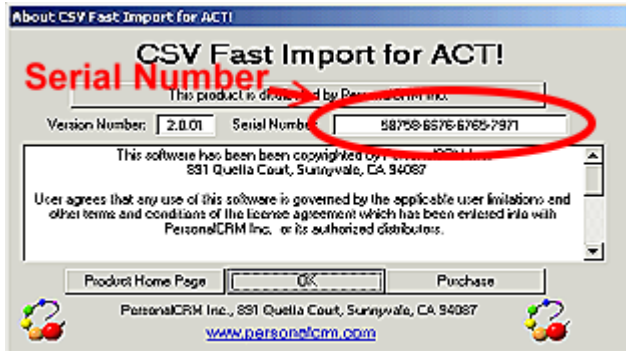


To activate Outlook-To-ACT Migration Professional, click on the [License Activation](#) option and enter the license that was sent to you.

If you have an active firewall, the license activation may fail to register. If the activation fails, click on the [Activate Registration Via Email](#) and upon receipt of your license number and email address, PersonalCRM will provide you with activation instructions for your own copy of Outlook-To-ACT Migration Professional.

Outlook-To-ACT Migration Professional Serial Number

Outlook-To-ACT Migration Professional has a unique serial number for every PC it is installed on. To obtain your serial number, click on [Help -> About Outlook-To-ACT Migration Professional](#) and your serial number is listed.



3.3 End-User License Agreement

Outlook-To-ACT Migration Professional LICENSE AGREEMENT - PERSONALCRM Inc.

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3.4 Uninstall

To uninstall Outlook-To-ACT Migration Professional, do the following:

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

[A Few Things](#)

- Installing and Uninstalling will not reset the evaluation period for Outlook-To-ACT Migration Professional
- Uninstalling Outlook-To-ACT Migration Professional will not reset the conversion counter

Outlook-To-ACT Migration Professional

Bring over your contacts!!!

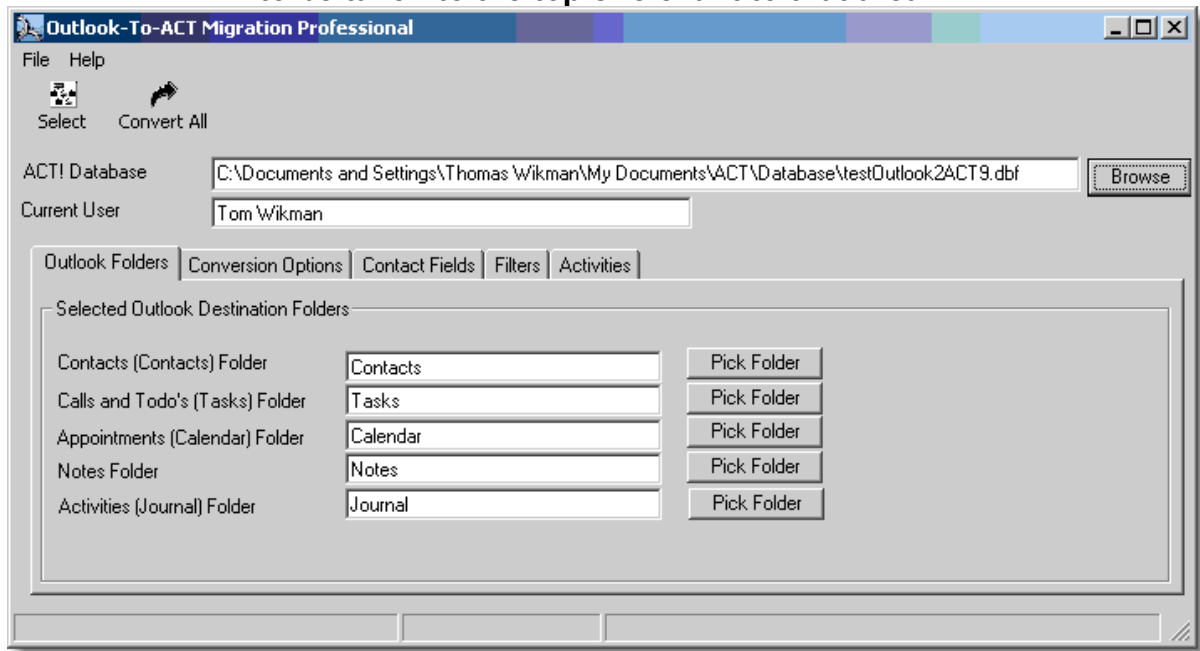
Part



IV

4 Running Outlook-To-ACT Migration Professional

Click anywhere on the screen shot of Outlook-To-ACT Migration Professional to be taken to the topic relevant to that area.

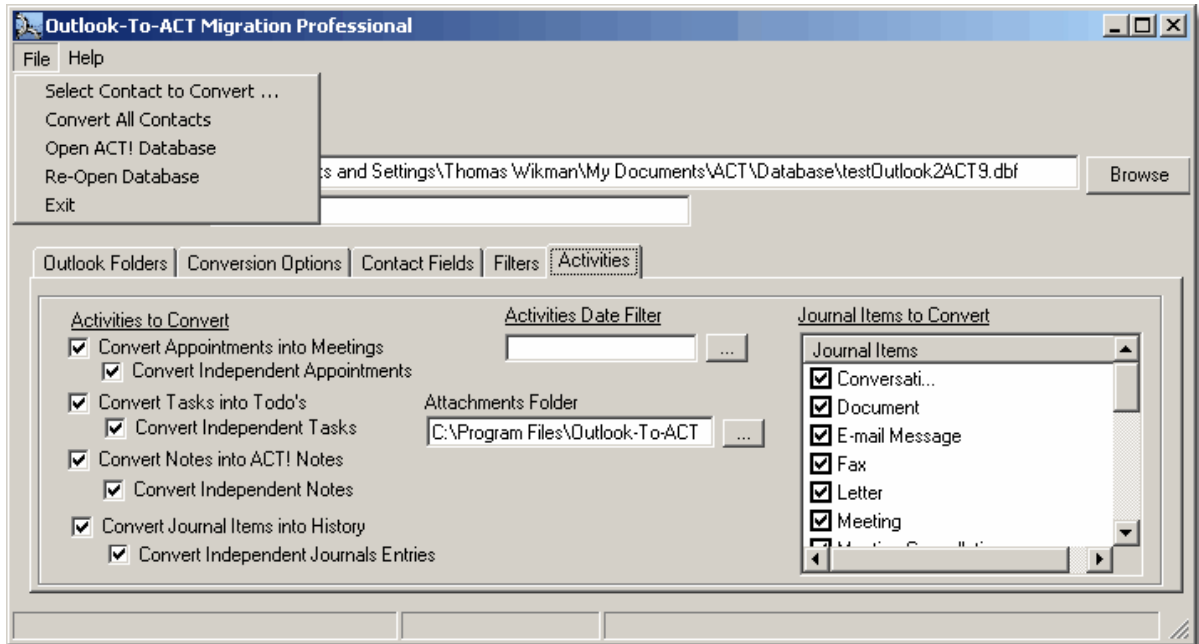


Before you are fully acquainted with Outlook-To-ACT Migration Professional for ACT!, it is recommended you backup the database in case any of the import is done erroneously.

[Sub-Topics](#)

- File Menu
- Help Menu
- Conversion Buttons
- Tabs
- Performance

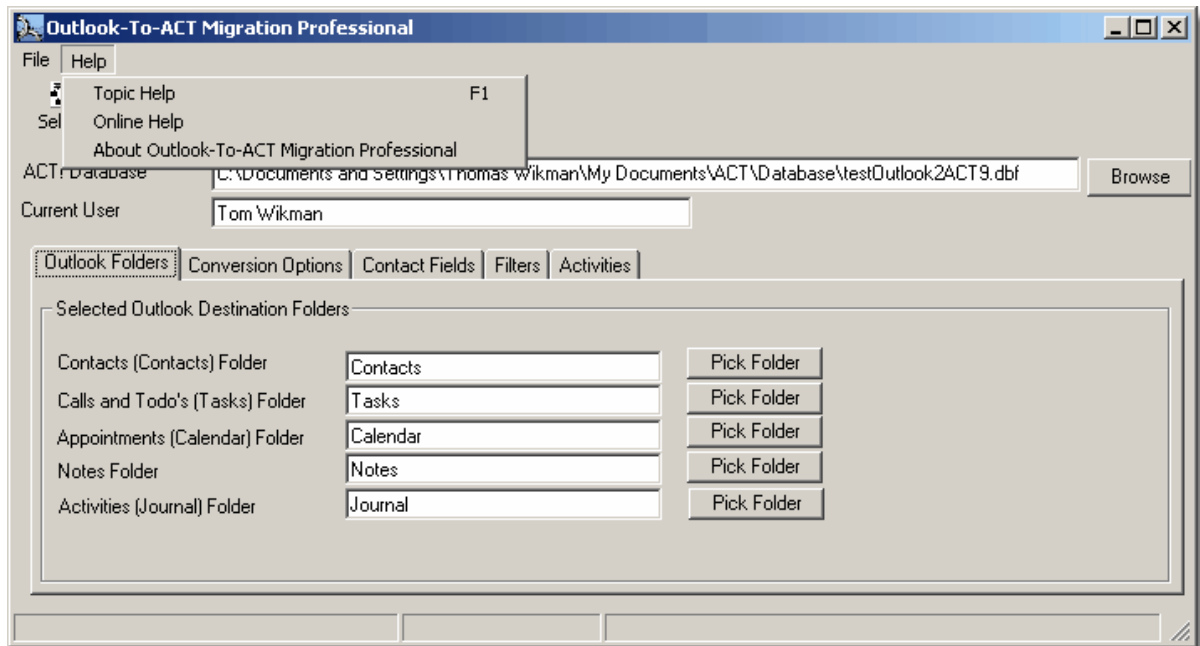
4.1 File Menu



The File Menu provides users with 5 options:

1. Select Contact to Convert. This is the same as pressing the Select button. It displays all the contacts in the Outlook Contact database that are available to be converted.
2. Convert All Contacts. This is the same as pressing the Convert All button. It processes all the contacts that are available in the Outlook find.
3. Open ACT! Database. This is the same as the Browse button. It provides the user with a selection screen to find the database to import.
4. Re-Open Database. This will close the selected database and open it again.
5. Exit. Exit Outlook-To-ACT Migration Professional.

4.2 Help Menu



The help menu has 3 options:

- Topic Help - This is the help shipped with Outlook-To-ACT Migration Professional.
- Online Help - Click here to access the online help. This help system is updated regularly with the latest additions/changes.
- About Outlook-To-ACT Migration Professional. Click here to find out the information about the current version of Outlook-To-ACT Migration Professional that you are running.

4.3 Conversion Buttons

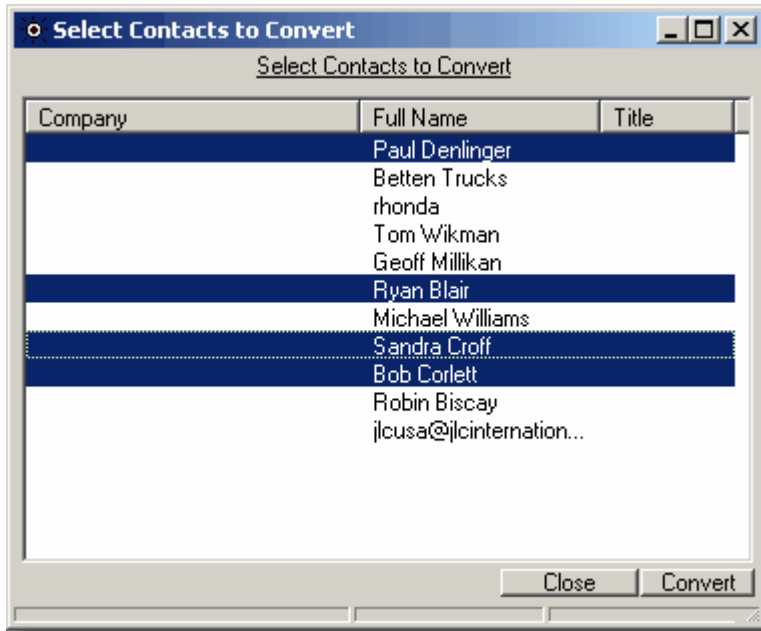


The Conversion Buttons are the buttons that are accessible by the user so convert the whole database or selected contacts in the database.

- Select. Click here to get a list of all the contacts that can be converted.
Important: The list in Select Contacts is created from the Outlook Filter set in the Filters Tab.
- Convert All. Convert All will convert all the contacts in the Outlook Database (restricted by the Outlook Filter in the Filters Tab).

During the Evaluation of Outlook-To-ACT Migration Professional, the Convert All button is disabled. You can only perform selective conversions

4.3.1 Select Contacts

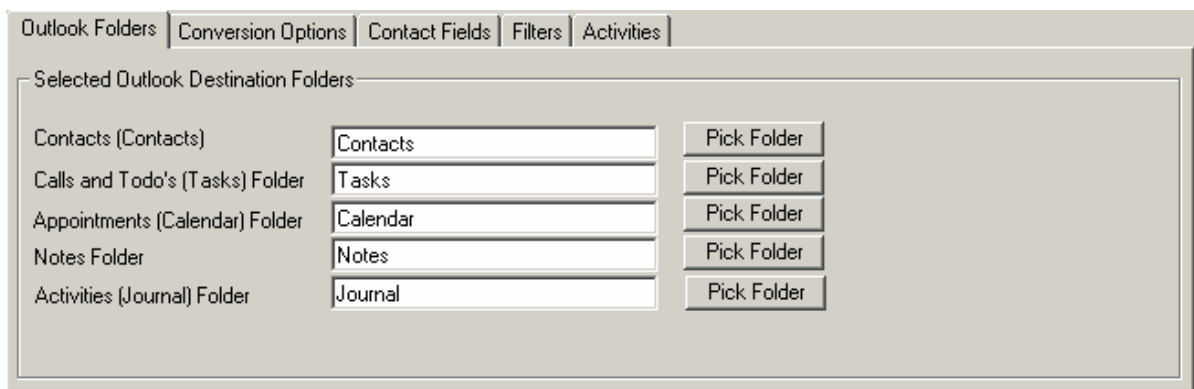


By pressing the Select button, the selective contact conversion windows pops up. You can select one or many contacts to convert. To convert simply press the convert button.

4.3.2 Convert All Contacts

When the convert all contacts is pressed, all the contacts in the Outlook database (restricted by the Outlook Filter) are converted into ACT! contacts.

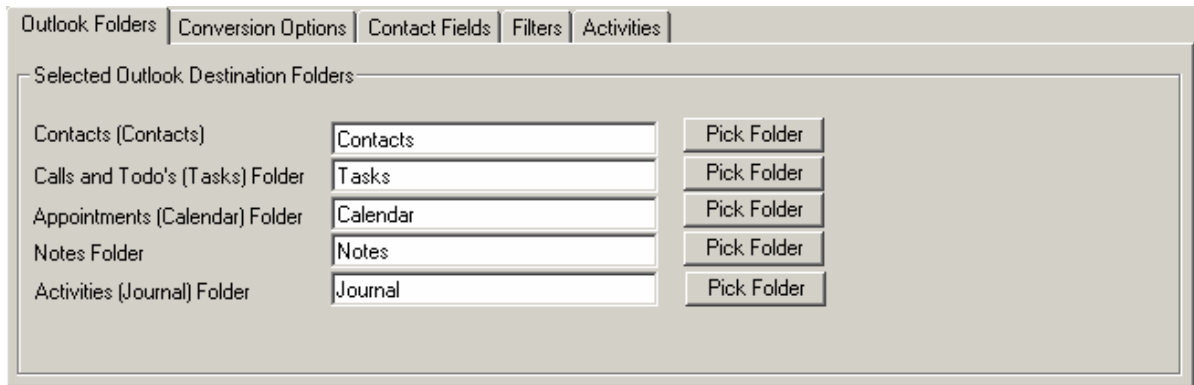
4.4 Tabs



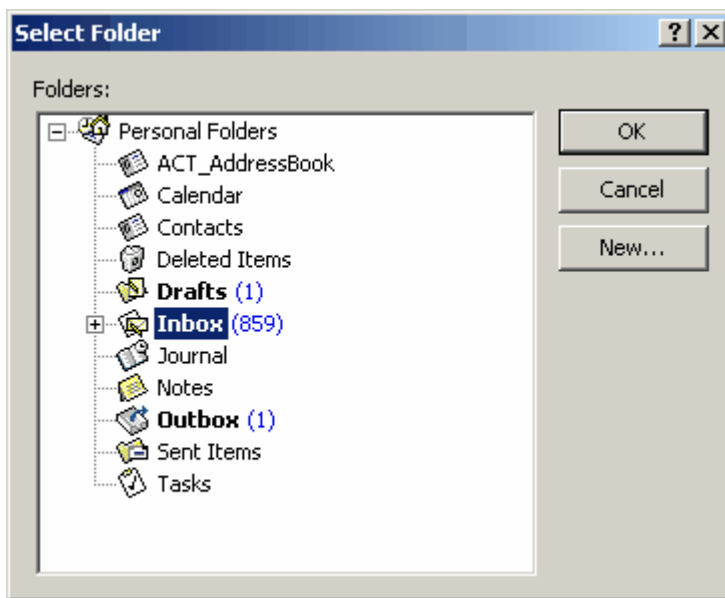
The different conversion options are accessed by clicking the appropriate tab selection:

- Outlook Folders: Setup where you want to retrieve the information in Outlook
- Conversion Options: Setup the options to use in this conversion
- Contact Fields: Field Remapping tab to tab any and all fields in Outlook to the ACT! equivalent.
- Filters: Set a filter to filter out the selection of Outlook contacts
- Activities: Select whether you want to convert Calendar, Tasks, Notes or Journal items from Outlook

4.4.1 Outlook Folders



Here you select the folder in Outlook from where Outlook-To-ACT Migration Professional obtains data. By click on Pick Folder, you are presented with an Outlook folder representation to retrieve the relevant folder. Make sure that you retrieve a folder that is of the type being requested, otherwise an error is generated.



4.4.2 Conversion Options

Click anywhere on the Options Group to find out about the options for that heading.



Conversion options provides you with a set of options used when converting.

Duplicate Found Actions

Check for Duplicates. This instructs Outlook-To-ACT Migration Professional to check for duplicates during the conversion. Duplicate checking is done as follows:

- First, the Outlook contact is analyzed whether it has been converted to ACT! before. If this is true, the contact in ACT! is then updated with the information from Outlook.
- Second, if no match has been found, check whether there is an Email Address in ACT! that matches the contact in Outlook.
- Third and last duplicate check. Check if we can find a contact using the [Duplicate Finding Strategy](#).
- If none of the above searches come with a positive match, then a new contact is created.

Enable Intelligent Updater. When selected, Outlook-To-ACT Migration Professional will only analyze Outlook contacts to be transferred if the Modification Date of that contact is more recent since the last conversion.

Phone Extension Prefix

The phone extension prefix is the alphanumeric character you use when entering a phone number extension in the same line as the phone number i.e. (408)555-1212 ext. 123 . In this case, the software will look for the extension prefix and enter the phone extension into the appropriate ACT! phone extension field. In addition, extension prefixes such e and ex are automatically scanned in the Outlook Phone Number

Addressing Options

Country Code: Enter the country code used.

Intelligent Address Conversion. When enabled, the address from Outlook is split up into fields and entered into the ACT! contact fields. For example, an Outlook address looks like 234 Street Ave., Suite 234, P.O. Box 893 . When this option is enabled, these fields are mapped into ACT! in the following way:

ACT! Address 1 Field: 234 Street Ave.
 ACT! Address 2 Field: Suite 234
 ACT! Address 3 Field: P.O. Box 893

Make Salutation for ACT! First Name. Outlook does not have the concept of Salutation. Also, in many instances, Outlook does not provide for the first name to come over. Setting this option, you ensure that the first name of the contact is set to the Salutation in ACT!

Options

Convert Outlook Categories into ACT! Groups. When set, this option converts the Outlook Categories into ACT! Groups with the contact being a member of that group. If Full Group Update is unset, the group information is added (cumulative) to the current ACT! group

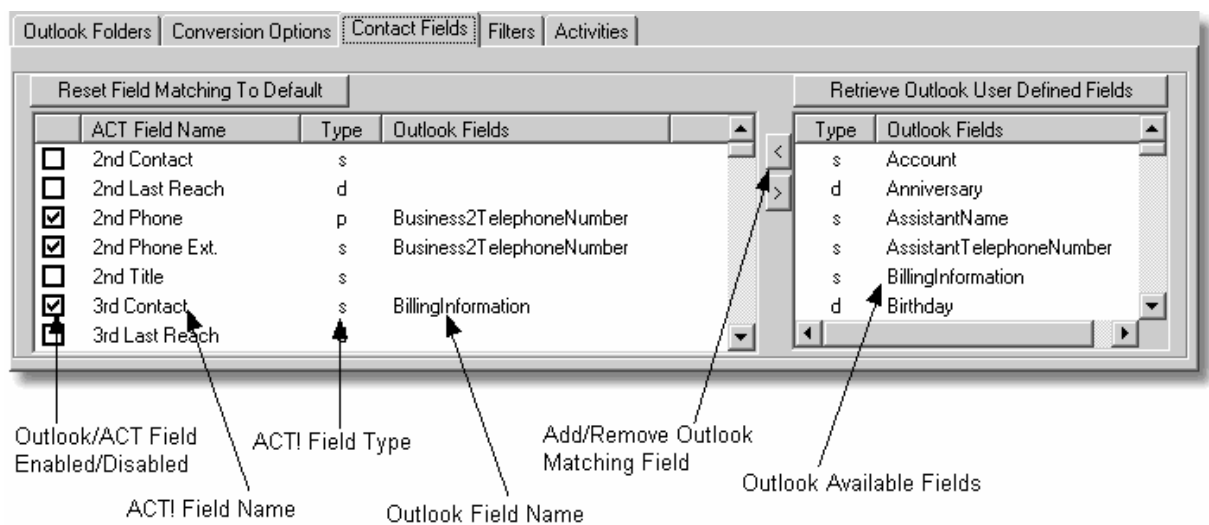
membership.

Full Group Update. When set, it instructs Outlook-To-ACT Migration Professional to fully update the group membership of the contact in ACT!.

Convert Body Text into ACT! History. When set, this option converts the body text of an Outlook Contact (the notes on the Contact Window) into an ACT! History Event named "Contact Note From Outlook" on the subject line.

4.4.3 Contact Fields

The contact fields tab allows you to map fields in Outlook to different fields in ACT!, Field remapping. This is specially useful when you have many user defined fields that you want to bring over to ACT!.



The fields are of 4 different types:

"s" – String

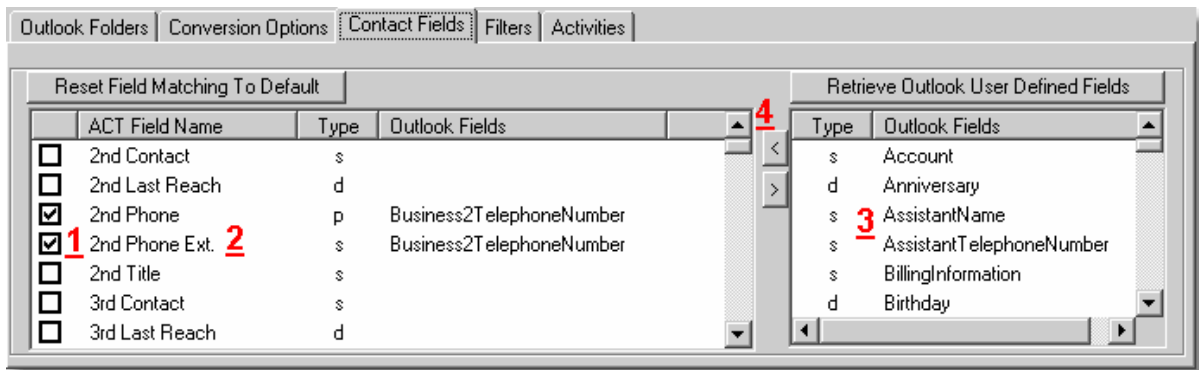
"d" – Date

"n" – Number

"p" – Phone number

It is recommended that you when performing the conversion, the field types be the same.

Mapping/Unmapping Fields



To Map a field over do the following:

1. Check mark the field you want to remap
2. Select the ACT! field
3. Select the Outlook field from the list. If the field is not listed and/or is a user defined field, click on the Retrieve Outlook User Defined Fields to retrieve the field from Outlook.
4. Click on the < button to remap the field

To Unmap a field:

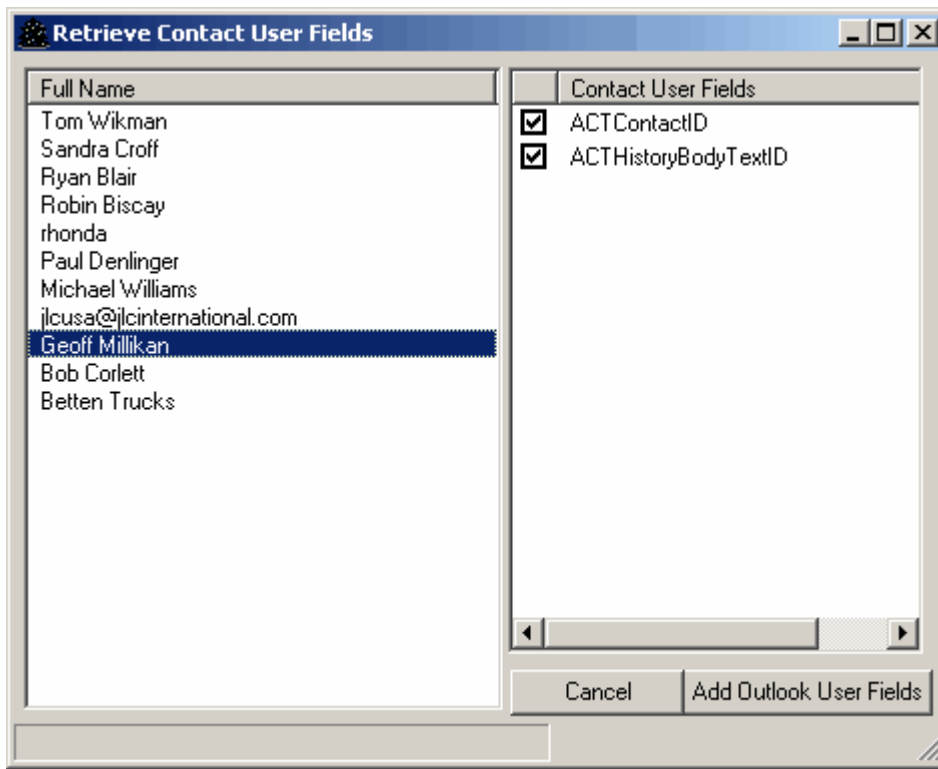
1. Select the field (step 2)
2. Click on the > to move the field back to Outlook

Retrieving User Defined Outlook Fields

All Outlook User Defined Fields are displayed in Bold in the field list. Outlook-To-ACT Professional allows the user to retrieve user defined fields that exist in Outlook.

Retrieve User Properties from Existing Contacts.

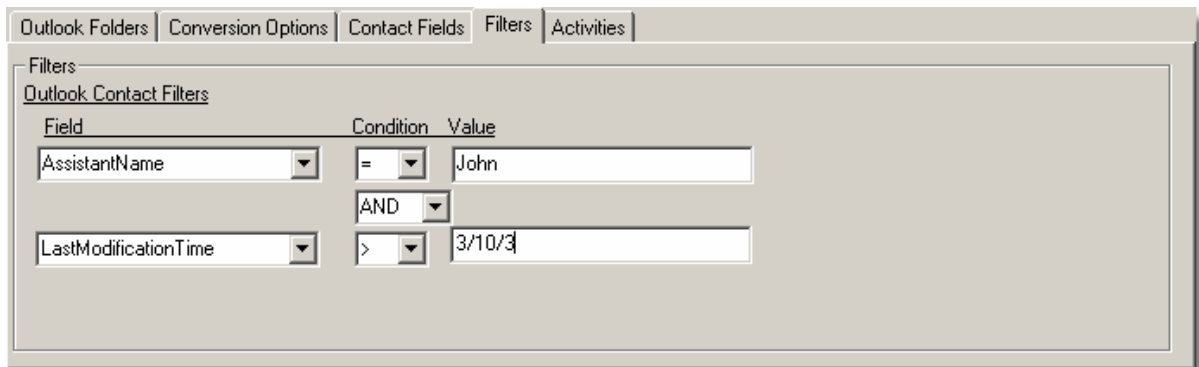
If you have Outlook contacts that have the user defined fields that you want, you can search Outlook for these fields using this option. This option creates a screen that displays all the contacts in the Outlook Contact Database and when you click on the contact, it will display the user fields defined for that contact



By clicking on the contact, this screen displays the user defined fields found for the contact. **Note: if the user defined field has an empty value, Outlook does not see it as a user defined field and it will not appear in the list!**

To add these user fields to the list of user fields that you want to create, select the Add Outlook User Fields button.

4.4.4 Filters

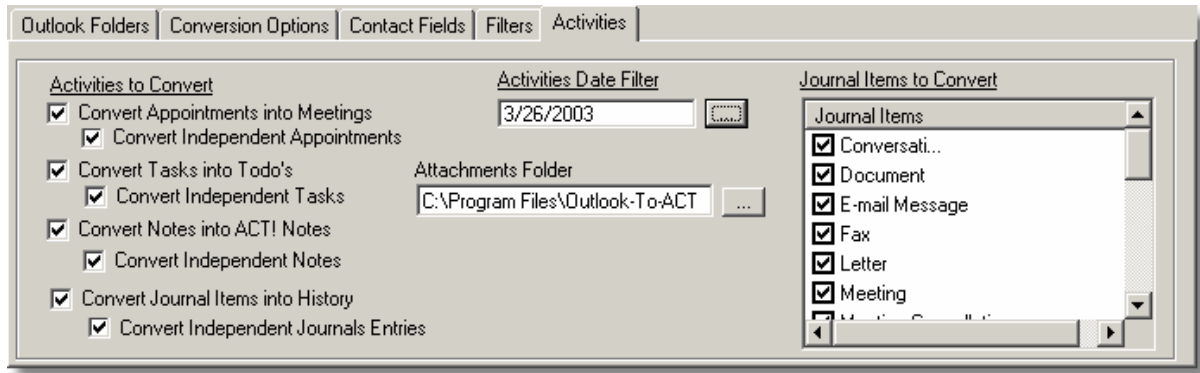


Outlook filters are filters that allow you to select a specific range of Outlook contacts to migrate over to ACT!. These filters are executed first before a conversion is made. To view the result of the contacts selected, click on the Selected option and a full count of the results of the Outlook Filters is displayed.

An empty filter (<None>) indicates all contacts.

An error is generated if a problem is encountered with the filters and the filters will have to be modified to result on a positive result.

4.4.5 Activities



The Activities tab allow you to select which Outlook Activities to bring over to ACT!. There are two types of Activities:

1. Dependant Activities. These are activities that are directly related to a contact i.e. at the bottom of the activity, it specifies which contact the activity has been scheduled with. These activities are mapped to the resulting ACT! contact.
2. Independent Activities. These activities are independent of contacts i.e. they have not been assigned to any contact in Outlook. These activities are brought over under ownership of My Contact.

Calendar, Tasks, and Quick Notes are brought to ACT! as Meetings, Todo's and History Notes respectively. However, Journal Items are brought over to ACT! as history items for the contact but as attachments for that contact.

4.5 Performance

Unfortunately, due to the underlying speed of Outlook and ACT!, Outlook-To-ACT Migration Professional is fully dependent on the speed of these software packages. Hence, it is recommended that you run the software on a local database using Outlook locally. Otherwise, speed will be a major factor. Outlook-To-ACT Migration Professional is not a speed daemon. We perform a large number of checks before we bring the data over and Outlook in conjunction with ACT! does not promote fast processing.

If you are creating a brand new database, disable Duplicate checking and conversion process will speed up significantly since no need to perform duplicate checking is necessary.

4.6 ACT and Outlook Fields

Outlook-To-ACT Migration Professional

Bring over your contacts!!!

Part



5 Tips and Tricks

The examples below lists a few of the applications of Outlook-To-ACT Migration Professional for ACT!.

This section keeps expanding as we receive more requests from users for explanations. Check the web help for any updates.

Subtopics

Phone Numbers
Journal

5.1 Phone Numbers

ACT! is very particular with Phone numbers while Outlook is very liberal with phone numbers. The following types of phone numbers will successfully be converted into ACT! phone numbers:

- Any numeric phone number i.e. (408)555-1212
- Any alpha number i.e. 1-800-MY-PHONE
- Any number with an extension i.e. (408)555-1212 ext: 234, or (408)555-1212 ext. 234

Phone numbers that will not come up as expected:

- Double Phone numbers on the same field i.e. (408)555-1212, (408)555-1213 . The first number will be correct until 1212 and then the second phone number is added to the remainder phone number
- Extensions that have no visible delimiter i.e. (408)555-1212 123 . The 123 string will be added to the phone number (unless a space is setup as an extension delimiter).

5.2 Journal

Journal entries in Outlook range a vast myriad of items from Emails, Notes, Calendar items, etc.. Hence, all journal items are transferred to ACT! in attachment format i.e. as an attachment to the history of the contact. In order to view these items, click on the item icon and the appropriate Outlook viewer is then selected to display the item.

Index

- A -

ACT 10
ACT! 3
Activate 11
Activities 25
Address 20

- B -

Bugs Fixed 7
Buy 8

- C -

Calendar 25
click here 6
Compatibility 10
Conversion Options 20
Convert All 17
Convert Selected 17

- D -

Date 20
download 10

- E -

Examples 27

- F -

Features 7
Field Remapping 22
Field Rematching 22
Fields 22
Find 24

- H -

Help 5, 6
How to Register 11
how to use help 6

- I -

Installation 10
Introduction 5

- J -

Journal 25

- L -

Latest Release 10
License 11
License Agreement 13
License Number 11

- M -

Main 20
Main Features 5
manual 6
Map 22
Matching Fields 22
Migration 3
more help 6

- N -

New 7
Notes 25

- O -

Open The Database 17
Outlook 3
Outlook Filters 24
Outlook Folders 20

- P -

Performance 25
Phone Number 27
print manual 6
Professional 3
Purchase 8

- Q -

Quick Start 16

- R -

Registration 11
Remove 14
Re-Open The Database 17
Running Outlook-To-ACT 16

- S -

Serial Number 11
Speed Improvements 5
support 6

- T -

Tasks 25
Technical Support 6
The Main Screen 20
Tips and tricks 27

- U -

Uninstall 14
Unlock Code 11
updates 10
Upgrade 10
User Fields 22
Using Outlook-To-ACT! 16

- V -

Version 10

- W -

Welcome 3
What's New 7
Where to buy 8
Where to Purchase 8
Why 5
Why Use 5

End of Printed Manual