CompuLEAD Data Import Instructions: ACT!

To import ACT! your data must be in Excel .txt format. Click here to convert to .txt



Click the Save in: field to locate the database folder. (Example: My Documents-ACT!-Database")

Type the name of your new database in the File name

Click Save

New Database	? 🗙
Save in: Database	← 1 →
File name: SalesContact.dbf	Save
Save as type: ACT! Database (*.dbf)	Cancel

Enter your information in the My Record Information Box

Click OK

Enter "My Record" Informat	ion 🔼
My Record information appears in letters, memos, fa to identify the creator of these documents.	axes and reports
Create using	ΟΚ
Company: Cordoba Coffee Shops	
Name: Chris Huffman	Cancel
Address: 13 East 54th Street	<u>S</u> elect
	Help
City: New York	
State: NY Zip: 10034	
Phone: 212-555-6756 Ext.:	
Country: United States	

Enter "My Record" Information My Record information appears in letters, memos, faxes and reports to identify the creator of these documents. Create using ΟK ACT! Click Yes if your information Is the My Record information complete and correct? CI Yes ۱D <u>N</u>o State: NY Zip: 10034 Phone: 212-555-6756 ... Ext.: Country: United States -

Import your contacts from the Text Delimited file or dBase file into the NEW ACT! database.

is complete and correct to

create your new ACT!

	٩	ACT! - <mark>[SalesConta</mark>	ct - Conta	icts]
Click File		Eile Edit Contact Lookup	Wr <u>i</u> te <u>S</u> ales (Reports
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Click Data Exchange		Data Exchange		Import Alt+F12
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	4	📇 Synchronize Setup		Zip 1003.
	Ud	Backup		Country Unite
	e E	R <u>e</u> store		
	Impo	Administration	•	No Group>

	This wizard will import data from another file into the currently open database. What type of file do you want to import? File type: Text - Delimited Note: If you do not see the file type that you want, you may need to convert your existing file to a delimited text file. Filename and location: C:\Documents and Settings\Man
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Import Wizard ? Open - 🗢 🗈 💣 🖬 Look jn: 🗀 test) || 1 🚞 ssetech 🗐 2nd001564A01q_SSE__TECHNOLOGIES_A.txt 0 🗐 🗐 3rd001564A01q_SSE__TECHNOLOGIES_A.txt | 🗒 000999A01q_XYZ_COMPANY_A.txt 0 🗐 001017A01k_ADVANCED_DRIVER_TRAINING_SERVICES_A.txt 🗐 O 001017B01h_ADVANCED_DRIVER_TRAINING_SERVICES_A.txt 🗐 Т < > 000999A01q_XYZ_COMPANY_A.txt File name: <u>O</u>pen Files of type: Text - Delimited (*.txt) Cancel -<u>N</u>ext > Finish Cancel

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Select the .txt file

Click Open

Text - Delimited

Select File type:

Click the Browse button to location your .txt file

Import Wizard	
	This wizard will import data from another file into the currently open database. What type of file do you want to import? File type: Text - Delimited Note: If you do not see the file type that you want, you may need to convert your existing file to a delimited text file. Eilename and location: C:\temp\test\000999A01q_XYZ_
	< Back Next > Finish Cancel

Click Next >

Salart	Contact	recorde	only
	Contact	1000103	UTITY

Click	Next	>

Import Wizard	
	ACT! databases can contain contact records and group records. What kind of records do you want to import? © Contact records only © Group records only © Contact and group records To view additional import options, click the Options button. Qptions
	< Back Next > Finish Cancel

Import Wizard ACT! allows you to use predefined map files to help you import data from other applications. These map files are predefined templates that match the database fields from other applications to fields in an ACT! database. Do you want to use a predefined map file? O Use predefined map On't use predefined map Select the map you would like to use when you import your data. edEx GoldMine anna Contact)rganizer < Back <u>N</u>ext > Finish Cancel

Click Next >

map

To map fields, select the label from the Map this field column, then select the corresponding from the To

Select Don't use predefined

fields in the currently open database. Map this field To this field First Name First Name • ~ Middle Initial First Name ~ Last Name Prefix Home Address 1 Last Name Home Address 2 Home City Last Name Suffix Home Country Title Home Phone v Company 1 Home State < Home Zip Reset D/Status ар Last Name Record 1 Default < <u>B</u>ack Cancel Finish

CONTACT MAP The data being imported must be mapped to the individual

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Import Wizard

Click Finish

At this time the records will Merge into your new database. The increasing of the numbers will let you know how many records

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You are done!

If you need assistance importing your sales lead data into your third party software, please contact a technical support specialist at 708-786-5565.