Converting ACT!®

to CSV/Excel

Using Exporter® Software

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OUTPUT FILES

Accounts vs ACT! Companies

Many contemporary CRMs use Accounts which are like ACT! Companies. Some, such as Salesforce, require that all Contacts be assigned to an Account. Even if not required, it is generally considered best practice to have all Contacts assigned to an Account. Because ACT! has a ContactCentric structure, Contacts are often not assigned to a Company. Therefore, the Exporter software will build Accounts using the rules below.

- If a contact belongs to an ACT! Company, the account information for that Contact will be taken from the ACT! Company data table. The UniqueID for the Company will be placed in the AccountID field in the Contact.csv file. The X_AccountName field will be populated with this name.
- If a Contact does not belong to an ACT! Company and the contents of CompanyName in the Contact record does not match an existing Company, then CompanyName will be used to create the account. All Contacts with the same CompanyName will be assigned to the created Account.
- If a Contact does not belong to an ACT! Company and does not have a company name in the record, the contact will be assigned to an Account called "*Not Given*"

Because ACT! has numerous ways to assign Contacts to Companies, sometimes what you see in the Company field in the Contact detail display can be misleading. For example, if the Contact is assigned using the Groups/Companies tab or using a dynamic assignment rule, the data in the Company field will not reflect this. Generally, the information in the Groups/Companies will display all the links.

ACT! allows Contacts to be assigned to multiple Companies. This can frequently cause issues with other CRMs. If a Contact has been assigned to multiple Companies, this information is contained in the X_Other_Companies field.

More information here: ACT! Company vs Company Name
https://jltechnical.com/article_blog.htm

CSV/Excel Format

All tables are exported in windows qualified Comma Delimited Values (CSV) format. This means that each line of the file is a data record. And each record consists of one or more fields, separated by commas. A quote mark (") qualifier is placed around each field. This allows embedded quotes, commas, and line feeds within the fields.

These files can be opened and edited with Excel. However, this can produce some unwanted results.   For example, Excel will strip off leading zeros of zip codes. To stop this, you will need to format the Zip Code field each time before saving the file.

Tables Exported

Account	The Account table is created by the Exporter software. It is intended to be used instead of the ACT! Company table. For additional information, see the Creating Accounts section in this document.
ACT_User	Contains the users of the ACT! Database. In ACT! each user also has a "my record" in the Contact Table. The ContactID field points to this record. This table also shows the number of Contacts assigned to the user.
Activity	Contains the fields for the Activity record – reoccurring and nonrecurring can be associated to one or more of any of the ACT! entities – Contact, Group, Company, Opportunity For additional information, see the Migrating ACT! Activities article here https://jltechnical.com/article_blog.htm
Campaign Results	Contains the data in the Campaign Results table.
Company	These are the Company records created in ACT! This is a subset of the Account table. For additional information, see the ACT! Company vs. Company Name article here https://jltechnical.com/article_blog.htm
Company Associations	ACT! allows Contacts to be assigned to multiple Companies. This table contains the joining IDs for the multiple Companies. Entries here can often be misleading and the result of an invalid assignment rule.
Contact	Contains the main Contact data table. It is related to the Account/Company via the AccountID and/or CompanyID. Contact records can have related Notes, History, Activity and Opportunity records. This table combines the Address, E-mail, and Phone data from the separate ACT! tables.
Contact_Relationships	An association table relating Contacts to Contacts and the details of the relationship.
Opportunity_ProductService	This table contains the Line Items for the Opportunities. A one to many for listing the Product line items for each Opportunity.
Opportunity_Roles	A joining table linking multiple Contacts to an Opportunity.
Product	A data table containing product and service information.
Picklist	A definition table. Contains the items for fields defined a Picklists.
Sales_Stage	A definition table. Contains both stock and user defined Sales Stages.
Secondary Contacts	This is a table created by the Exporter software. Contains data entered in the Secondary Contact tab. Related to Contact table via the ContactID. Entries do NOT have any related records. ACT! maintains the Secondary Contacts in the Contact table. The Exporter software separates them. These are often the result of a conversion of a pre-SQL database.

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Spillover Tables

ACT! does not limit the number of user fields that can be added to the base tables. However, if the maximum row size is exceeded, Spillover tables are created. The Exporter attempts to combine as many of these as possible. However, when this cannot be done, extra tables are labeled CONTACT_SPILLOVERn (where n is the is the sequential number of the Spillover table).
Example :
CONTACT.CSV
CONTACT_SPILLOVER3.CSV
CONTACT_SPILLOVER4.CSV
In the above example, the Spillover tables 1 and 2 have been combined into the CONTACT.CSV table.

CustomTables

ACT! does provide the ability to add Custom Tables. These are done via an option from Swiftpage or 3rd party. These tables will be labeled XCUST_*tablename* (where tablename is the name assigned by the user). There will also be joining tables for the Company, Contact, Group and Opportunity tables. These are labeled XCUST_COMPANY_*tablename* , XCUST_CONTACT_*tablename* ..etc.

Extension Files

Most Import utilities restrict the size of the CSV to 50-100MB. This means that large tables need to be split. When this happens, the tables are labeled TABLE_NAMEn(where n is the is the sequential extension number).
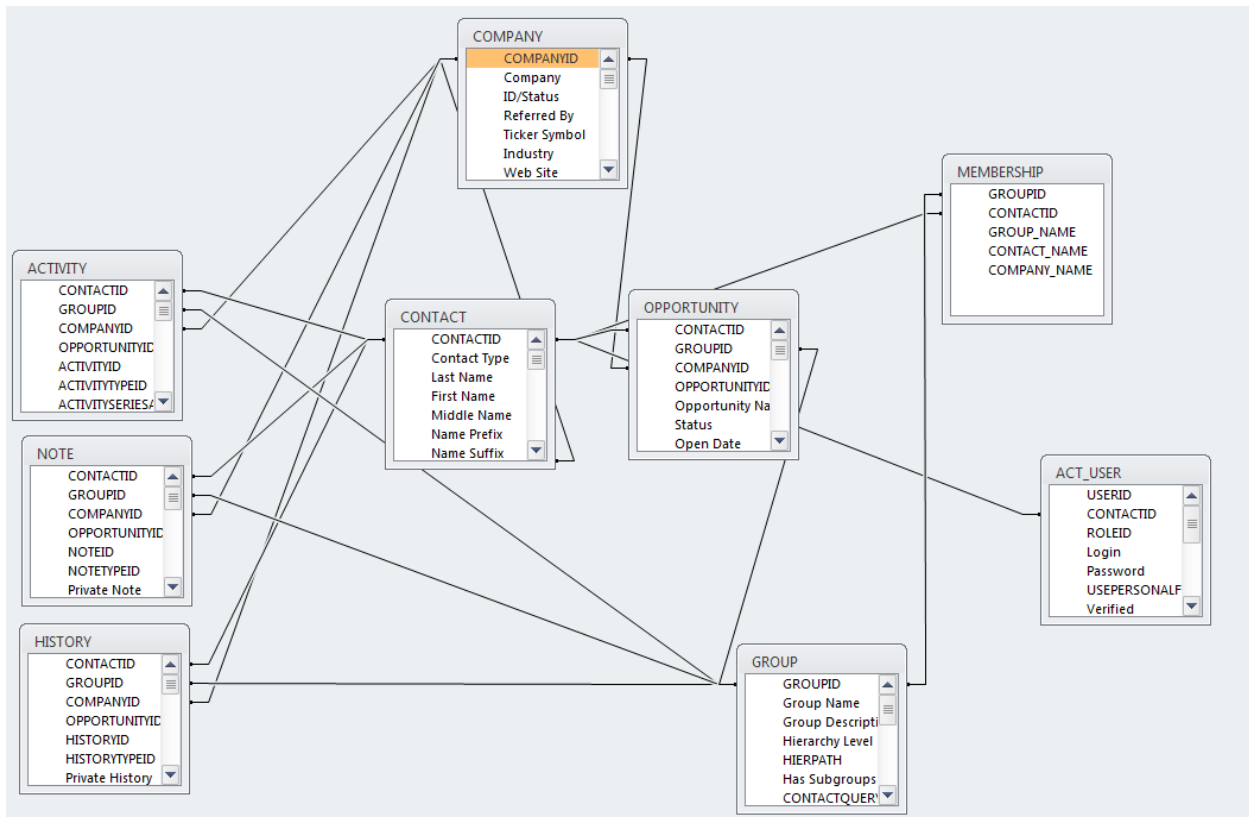**Example:**
HISTORY.CSV
HISTORY_1.CSV
.
HISTORY_*n*.CSV

RELATING THE EXPORTED DATA

The data is exported into several files. These files are linked together by a uniqueID field. You need to be aware of how they are joined to link the "child" records back to the "parent". In each file (Contact.csv, Note.csv etc, you will see fields whose names end in ID. The flowing diagram illustrates how the tables are linked

Relationship Diagram

Relationship IDs

Table	Primary ID	Joining/Parent IDs
Account	X_AccountID	
ACT_User	UserID	Lookup table for all other tables
Activity	ActivityID (not unique) X_Multiple_ActivityID(unique) *See Note1*	CompanyID ContactID GroupID OpportunityID *Activities must always be linked to at least 1 Contact.*
Campaign Results	Campaign ResultsID	ContactID
Company	CompanyID	
Company Associations	Joining Table	CompanyID ContactID
Contact	ContactID	CompanyID
Contact Relationships	Joining Table	ContactID1 ContactID2
Group	GroupID	
History	HistoryID (not unique) X_Multiple_HistoryID(unique) *See Note1*	CompanyID ContactID GroupID OpportunityID
Membership	Joining Table	ContactID GroupID
Note	NoteID (not unique) X_Multiple_NoteID(unique) *See Note1*	CompanyID ContactID GroupID OpportunityID
Opportunity	OpportunityID	CompanyID ContactID GroupID
Opportunity_ProductService	ProductServiceID	OpportunityID
Opportunity_Roles	Joining Table	ContactID OpportunityID
Secondary Contacts	SecondID	ContactID

FIELDS CREATED BY THE EXPORTER SOFTWARE

The Exporter software creates several fields to assist you understanding the data.

Fields beginning with ACT_ are ID and/or system fields from ACT! While these usually don't need to be included in your import, we recommend that you do include them for future links back to your ACT! database.

Fields beginning with X_ are translated fields. For example, the X_RecordManager field is the actual name of the Record Manager instead of the coded ID. All coded fields are still exported.

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