Converting from ACT!®

to Salesforce.com®

Using Exporter® Software

Contents

Data Clean-up

If you weren't using the data in ACT!, you probably won't be using the data in Salesforce.

1. Remove duplicate records
2. Remove records where the Contact and/or Company is blank.
3. Make certain any picklist that you plan to move contains only valid data.
4. Separate the data that will be imported. You can put it in groups and only export those groups.
5. Clean up your Group list.

Analyze the Conversion Data

Decide what data will be imported from ACT! and where it will go in Salesforce. Here are few questions to address that can help set up your Salesforce org.

1. Do you want to import everything? Or, can some of the really old data be filtered out.
2. Do you want to use Leads and only import your contacts into the Salesforce Accounts/Contacts?
3. How do you plan to deal with attachments? They can be imported into Professional and above editions. But, Salesforce does charge for excess data. They can be loaded into Drop Box with a field that links to them.

Export the ACT! Data

There is a separate User Guide for the Exporter software. It is recommended that you read it before proceeding. The steps below are a summary to get you started.

Depending on the size of your database, full extracts can take a while. We suggest that you first export a sample of your database for testing.

Setup Tab

1. Select the version of your ACT! database.

2. Select the **Salesforce.com** option.

3. Select the SQL Server Instance you are using to read the database

4. Browse to your ACT! database and select it.

5. Browse to a folder to put the exported data and select it.

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Custom Controls Tab

Specify how you want Accounts built.

If you're testing…..

select Run in Evaluation Mode and specify your sample size.

set the "Drop Fields" limit to zero to force all fields to be exported.

Remap the ACT! Users

Specify how the ACT! contacts will be assigned in Salesforce. By remapping during export, you will save a significant amount of time when preparing the records for import.

> **In this example only Chris Huffman and Allison Mikola are moving to Salesforce. Allison will become the owner of all records that don't belong to Chris.**

	Setup	Custom Controls	Filters	Map Users

Remap ACT! User names to Target system User names

ACT! User Name	ACT! User ID	Target System UserID
Allison Mikola	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2	00541000000Qf00AAC
Betty Browser	U6689D53A-6FC8-492E-873A-641E2059BA72	00541000000Qf00AAC
Chris Huffman	U086273C0-12CF-446E-9AFE-F09164628D4D	00541000000QeuzAAC
Ernst Anderson	UCF47F0E8-4A3B-498F-A327-CFF670D48AAC	00541000000Qf00AAC
Fred Fenderline	U7DB3666D-2B70-4DEB-8AFE-575CBE72E932	00541000000Qf00AAC
Jonathan Sommer	U50A13FE7-961C-4E8D-AEB1-BAA4C1A74F50	00541000000Qf00AAC
Juliette Rosseux	U6AD0E080-B19B-4B68-B8EC-2755D99358CA	00541000000Qf00AAC
Melissa Pearce	UFD540A2D-A131-41B3-947B-1B9DFA826597	00541000000Qf00AAC
Sarah Whiting	UD9C02DC2-3B07-48E6-8335-9AC969A66AAB	00541000000Qf00AAC

Note--User map is saved as a CSV file which can be modified using Excel.
A blank will be inserted for any User not mapped.

Save

Cancel

Apply Filters

ACT! creates a history record for numerous events – when you delete a contact, change a field, sync the database, send a mass mailing etc. In some older databases this can be over 100K+ records. We recommend that you always set the "Recommended filters" on.

> **For testing, we suggest that you use the Group filter to target your testing efforts to known contacts. You can build an ACT! group just for testing.**

Exporter Output

When the Exporter completes, there will be a folder named Salesforce_com located in the path specified in Step 5. There will be several files, all with a .csv extension and a folder named Auxiliary Tables. .

CSV Tables
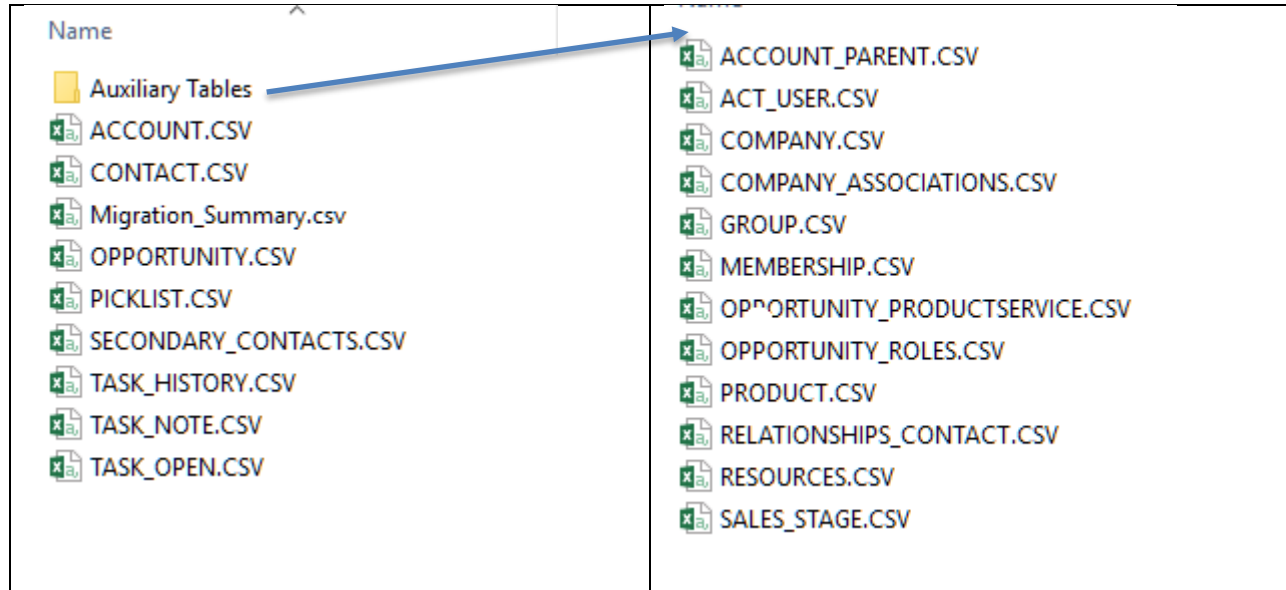
The ACT! IDs

The Exporter software puts a letter in front of each of the IDs to help identify the type. Salesforce does this too but with a 3 digit code.

A Exporter Created Account	T Activity
X Account that was an ACT! Company	Q Product/Service
C Contact	P Product
H History	S Secondary Contact
N Note	G Group
O Opportunity	

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Salesforce Setup

User Set-up – You're probably not going to transfer all the users from your ACT! database into Salesforce. You should set up the users that will be moving to Salesforce before running the export. Once set up export the internal Salesforce IDs to load into the Exporter software's map table.

> The Exporter will allow you to reassign ACT! users to your SFDC users.
> Salesforce users must be Active Users if you plan to assign data to them.

Name option setup – Salesforce allows you to add a middle name and suffix options to the data entry screen. ACT! Automatically separates them when you enter the full contact name. So, if you've been using a suffix and/or middle name in ACT!, you need to enable this function. You will find more information in the Salesforce on-line instructions.

Salesforce Duplicate Checking – You should temporarily turn off the Salesforce duplicate checking for both the Accounts and Contacts. If records are rejected, you will have issues when trying to import records that have been linked to them i.e. Notes, History and Activities.

Audit Fields – Salesforce allows you to import the actual create date and edit date. You will need to enable this option before importing your data.

Migration Summary. The Migration Summary is a list of the ACT! fields that did not map to Salesforce fields. If you plan to transfer these, you will need to add them to Salesforce.

*** ACCOUNT	Field			Valid	Invalid	Max	
*** Fields to Create	Type	Length(DF	Populated	Picklist	Picklist	Length	
ACT_AccountID	Text - Exte	150	132			37	
ACT_CreateDate	Date		132				
ACT_EditDate	Date		131				
ACT_RecordMgr	Text	150	132			5	
ID/Status	Pick List	254	118	25	0	26	
Import Date	Date		130				
Referred By	Pick List	64	23	8	0	17	
Toll Free Phone	Text	38	11			14	
Account Total Fields = 8							
The ACT! Company Business address was remapped to Shipping Address							
*** CONTACT	Field			Valid	Invalid	Max	
*** Fields to Create	Type	Length(DF	Populated	Picklist	Picklist	Length	
ACT_CompanyName	Text	128	200			34	
ACT_ContactID	Text - Exte	150	202			37	
ACT_CreateDate	Date		202				
ACT_EditDate	Date		201				
ACT_EditUser	Text	150	201			5	
Dear	Text	32	198			9	
Group Membership	Pick List(N		190	0	0	183	See Note 1
ID/Status	Pick List(N		197	196	1	30	
Last Results	Pick List	128	4	3	1	64	
Messenger ID	Text	16	17			15	
Private	Checkbox	1	2				

The Migration Summary also contains information about how your data is distributed. This may help you decide if you would like to apply any filters to the data instead of importing everything. Any field that has been created by the Exporter and not part of the ACT! database will be prefaced by X_. ACT! system fields the field will be prefaced by ACT_.

Add User Defined Fields to Salesforce. Using the Migration Summary, you need to determine which fields will transfer from ACT! to Salesforce. There are some that must be included. These are the ID fields for each object. They are not visible to the user in ACT! but are required for import.

> We recommend that when you create the new fields in Salesforce you match the names in ACT! This will allow the import program to auto match your fields. If you want to change the names, you can do so after the import is complete.
>
> For the ACT_ContactID, ACT_AccountID and ACT_OpportunityID, select the "External ID" checkbox .

PickList.CSV– This files contains a list of fields that have pick list (drop downs) in ACT!. If you want to use the pick list in Salesforce, you can copy the values and when you define the field in Salesforce, paste the list into the Salesforce field or create a global picklist.

a.

> ACT! is not fussy about what goes into PickList fields. Salesforce is. Entries that are not in the picklist will be rejected. These will need to be corrected or you can change the field type to Text.

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Import your data

There are several data loaders for Salesforce – Jitterbit, dataloader.io, Excel Connector and the Apex DataLoader. If you are using an SFDC edition with access to the API, we would recommend using the Apex DataLoader from Salesforce. It can be downloaded from Salesforce.

The order that you import your data is important. You must load the parent (top) level objects first. i.e. Accounts before Contacts.

Import Order

1. Accounts (ACCOUNT.CSV) >>insert into Account Object

2. Contacts (CONTACT.CSV) >>insert into Contact Object

3. Opportunities (OPPORTUNITY.CSV) >>insert into Opportunity Object

4. Notes (TASK_NOTE.CSV) >>insert into Task Object

5. History (TASK_HISTORY) >>insert Task Object

6. Activities (TASKS_EVENTS.CSV) >>insert into Task or Events Object

7. Secondary Contacts (SECONDARY_CONTACT.CSV) >>insert into Contact Object

> **Depending on the complexity of your ACT! database, there are several extended options that can be imported – Account Relationships, Opportunity Line Items etc.. These files are found in the Auxiliary Tables folder. If you plan to use these files, you will need to consult the Salesforce documentation to migrate them.**

Preparing the Exported Files for Import

With the exception to the Account table, all tables must be related to another table. To do this, you will need to use the Excel Vlookup command to convert the ACT! IDs into Salesforce IDs. Below are the steps for importing Contacts.

Import the Accounts.

Export the ACT_AccountID and the ID (SalesforceID) from the Accounts table into a file named Account_Extract.

> **The ACT_AccountID must be in Column 1 of the reference file. If not you can cut it and insert it there.**

Open the Account_Extract file with Excel and sort the ACT_AccountID column in ascending order.

Open the Contact.csv file.

Insert a column to the right of the ACT_AccountID column and label it AccountID.

Insert the formula =vlookup(a2, Account_Extract.csv!a2:b50000,2,false) into the B2 cell.

> **a2:b50000 is the range of the lookup table (Account_Extract). If yours is larger, it should be modified i.e. a2:b150000. The top location should always be set to a2.**

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Copy the B2 cell

Paste it into the remaining cells in Column B. They should all populate with the Salesforce AccountID. If they don't, there's likely an error with the formula and/or the lookup file (Account_Extract)

There should be no cells that do not match.

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The Contact.csv file can be inserted using the DataLoader. When you now view the Account records in Salesforce, you should see the related Contacts.

You will need to do this for the remaining files. Below is the list of ACT! IDs that need to be changed to Salesforce IDs.

Finding Duplicates

ACT 2005+: You can use ACT! to find these records. To do this, select **Scan for Duplicates** from the **Tools** menu.
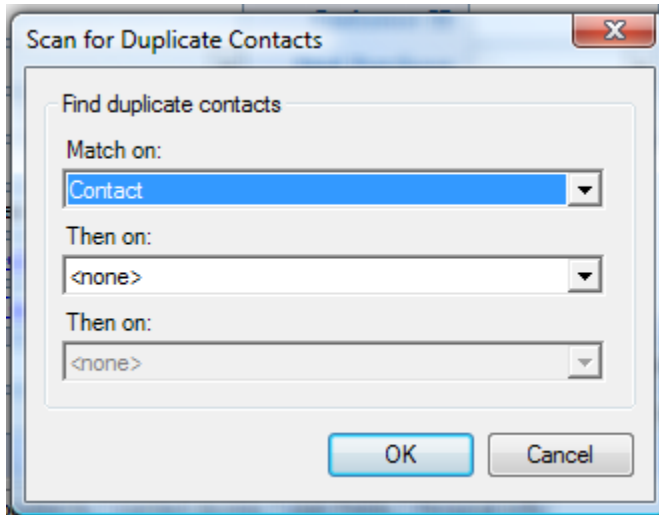
Remove the Old Data.

ACT! allows you to save a lot of "stuff" . Unfortunately, a lot the the "stuff" is really junk. So, you might want to take some time and get rid of the data that you will never use.

Remove Old Data

To enhance performance, remove the data you no longer need.

If you want an archived copy of the data, you must back up the database before you begin.
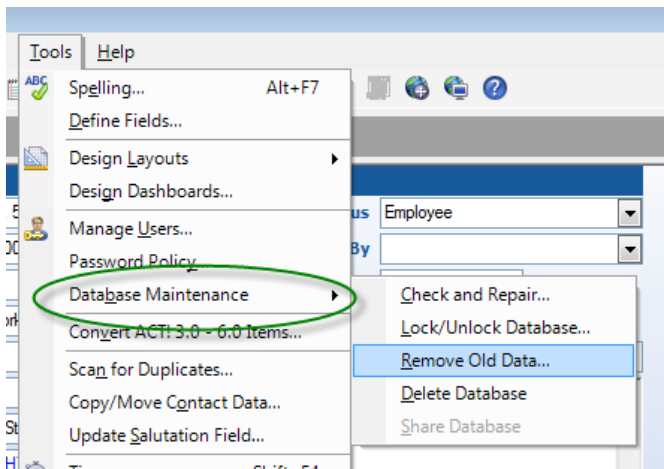
Today's Date: 8/6/2009

Remove from database

- ☑ Notes older than — 360 days
- ☑ Histories older than — 360 days
- ☑ Cleared activities older than — 60 days
- ☑ Closed-Won and Closed-Lost Opportunities older than — 60 days
- ☑ Open and Inactive Opportunities older than — 60 days
- ☑ Document tab entries older than — 0 days

[OK] [Cancel]

Appendix B – How the differences are handled

There are many differences in structure between the ACT! and Salesforce databases. The following explains how the Exporter deals with these:

Account Assignment

In Salesforce.com, if a contact is not assigned to a company, then the record owner is the only user that has access to the contact and the contact cannot be odified. Therefore, when the import files are prepared, each contact is assigned an account using the following rules.

If a contact belongs to an ACT! Company, the account information for that contact will be taken from the ACT! Company data. The UniqueID for the company will be placed in the Salesforce.com Site field.

If a contact does not belong to an ACT! Company and the Company name is present in the contact's record, then this company name will be used to create a Salesforce.com 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 a Salesforce.com Account called "*Not Given*"

Blank Contacts

If the Contact name is blank and there is a Company name, then the contact will be named Contact at *companyname*.

Account Addresses

ACT! Companies can have three address fields. Salesforce.com only has two. When ACT! company data is used to populate the Salesforce.com Account addresses the following rules are used:

If the ACT! Company Billing Address field is blank, the Address is moved to the Salesforce.com Billing Address.

If both the ACT! Company and billing addresses contain data, the ACT! Company address is put into a field which will need to be created labeled, ACT_Company_Address.

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Groups

There are no groups in Salesforce.com. However, they can be simulated using Salesforce views. Exporter provides a field labeled Group Membership which contains a list of all the groups the contact belongs to. To use this in Salesforce, do the following:

1. On the Contacts home page, click the Create a New View option.
2. Give the view a name –e.g., the name of your ACT! Group
3. Specify the filter for the group
   a. In the Field dropdown, select the Group Membership field.
   b. In the Operator field, select *contains*
   c. In the Value field, enter the name of the group.

Secondary Contacts (ACT! 2005+ only)

Salesforce does not have a similar function to ACT!'s secondary contacts. If you want to include secondary contacts, you will need to load them separately. Secondary contacts will be linked to their primary contact in Salesforce. You will see the primary ContactID in the Reports To: field of Salesforce.