



# Exporter<sup>®</sup>

## User Guide

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## INTRODUCTION

The **Exporter**<sup>®</sup> software extracts data from an ACT!<sup>®</sup> database and reformats it into several types of standard, flexible output formats which can be used to migrate into other CRM packages or use the data in applications not provided in ACT!. The output formats include: Microsoft<sup>®</sup> Access<sup>®</sup>, pre-mapped CSV files for import into Salesforce.com and ZOHO and delimited text (CSV) which can be used with Microsoft Excel.

Exporter will export the following ACT! data

- Contacts
- Companies (ACT! 2005 +)
- Groups
- Notes
- History
- Opportunities (Base Record, Line Items and Products)
- Secondary Contacts (ACT! 2005+)
- Group Membership
- Pick List (ACT! 2005+)

**Attachments are not stored within the ACT! database so they are not exported directly. The path to the attachment/library document is exported as a history record and the actual attachment is stored in the Attachments folder contained in the database files folder.**

## System Requirements

ACT! does not need to be on your system. The Exporter software will extract from a copy of the database and does not use any of the functions in ACT!. However, for ACT! 2005 and above a SQL or SQL Express server is required. If you do not have a SQL Server, the Microsoft installer is included in the download package.

If you are exporting to Access, Access must be installed on your system.

## Evaluation Version vs Complete Version

The evaluation version of the Exporter software is the same program as the complete version. The only difference is that the evaluation copy will only export 200 contacts. All the data associated with the 200 contacts – companies, notes, history and opportunity records will be exported. This will allow you to test using your data with the target application. When you're ready to export the entire database, you simply purchase an activation key at [www.jltechnical.com](http://www.jltechnical.com).

# INSTALLING EXPORTER

## Installation

The installation program is named ExporterSetup.exe. You must run it to install the Exporter software on your hard disk. The following is a summary of what the Setup program does.

- Expands and copies the Exporter program to your hard disk. Unless you change the destination, these files are put in the directory C:\Program Files (x86)\JL Technical\Exporter.
- Creates an Exporter group on Windows Start Programs list. Within the group, there are icons for the program, utilities and documentation supplied with the Exporter software.
- If you are using Vista, Windows 7, 8 or 10 it will create a JL Technical folder in the Public folder.
- Places an icon on your desktop 

## Permissions

For ACT! 2005 and above, the Exporter software uses SQL to access the database. This can sometimes cause permission issues. To resolve this, the program installs to always run as Administrator. Depending on your system setup, this may mean that you will need an Administrator's password to run the program.

## BEFORE YOU BEGIN

Exporter will work on all SQL versions of ACT! However, depending on the version and whether or not you have ACT! on your system, you may need to do a couple of additional things before getting started.

**If you have an ACT! 4-6 database, you can either upgrade to a newer version of ACT! using a trial or send us a copy of the database.**

### If you DON'T have ACT! and exporting ACT! 2005 or above

Follow the instructions here:

<https://jltechnical.com/BLOG/Exporting%20with%20out%20ACT.htm>

### If you are using ACT! 2011 and above

You will be able to use the ACT7 server directly and you do not need any additional downloads.

### If you are using ACT! 2005-2010

We recommend that you make a backup copy of your database and follow the instructions here:

<https://jltechnical.com/BLOG/Exporting%20with%20out%20ACT.htm>

**While it is possible to export from the active ACT! database, to avoid permission issues, you may want to work with a backup copy of the database. Put this backup(.zip) file in a folder on the root. i.e. C:\ACT\_Export**

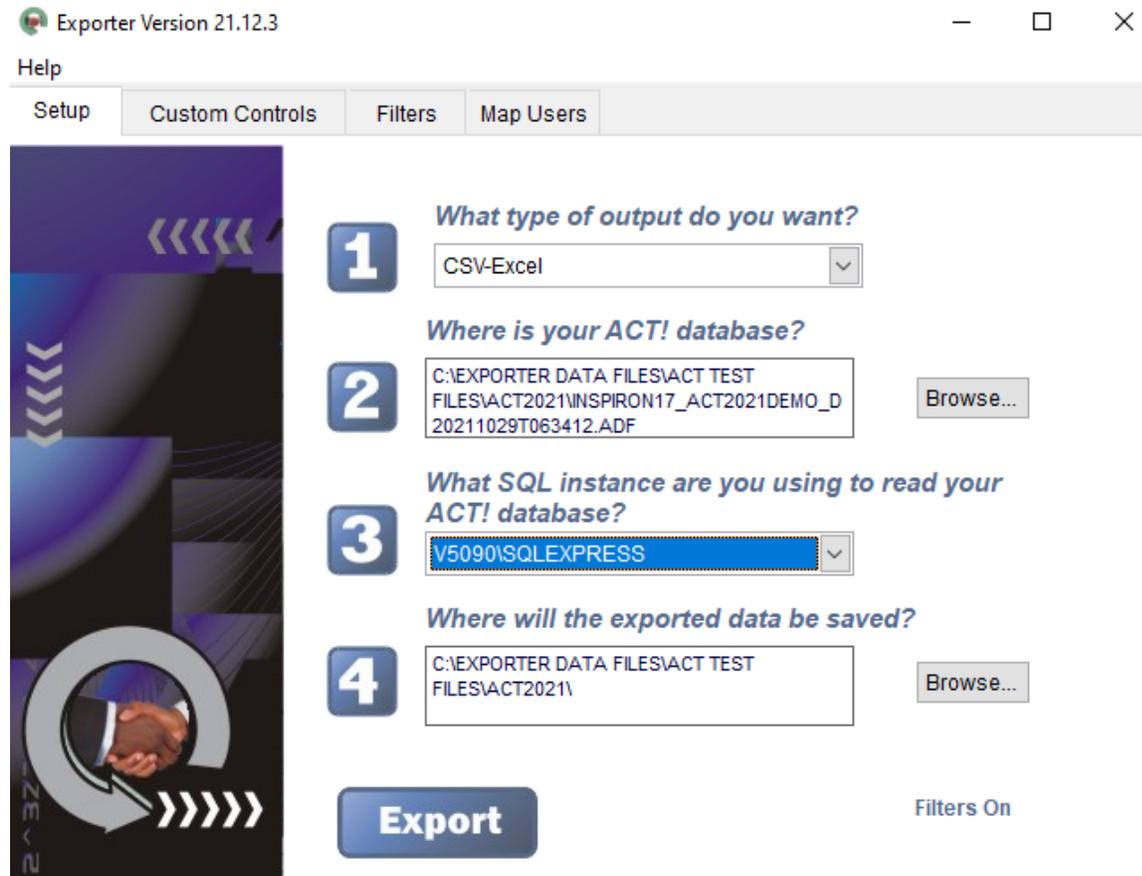
# RUNNING EXPORTER

To run Exporter, click the icon placed on your desktop at installation. Exporter's main screen will appear.



Exporter's main screen will appear.

## Setup



Item Number	Description
1	What type of output do you want? Specify the type of file you want the ACT! tables convert to. Each type is discussed in greater detail in the <a href="#">Export File Types</a> section.
2	Where is your ACT! Database? Select the database you plan to export. Use the Browse button to find the database and select it. This can be the active ACT! database .pad or .adf or a backup .bak or .zip.
3	Server to use There are 2 options. <b>Local independent SQL server:</b> If you have a separate instance of the SQL server on your system, you can use it to export from a copy of your ACT! database.

**ACT! SQL server instance:** (ACT7) Your ACT! 2011+ database can be used directly with this server. If you have a lower version of ACT! you should make a copy of the database and load an independent SQL instance from Microsoft.

- 4 Where will the exported data be saved?

This is the folder where the exported files will be saved. This should NOT be a folder in a protected area like the Desktop, Documents, virtual drive etc..

## Custom Controls

The custom controls allow you to “tweak” features of the export which may be required for your specific target application. When you move your mouse over each control, an explanation will be provided.

Exporter Version 19.1.1514

Help

Setup Custom Controls Filters Map Users

*Custom Controls allow you to add controls for the exported data to meet the requirements of your target application.*

<input type="checkbox"/> Remove embedded LF & CR characters.	Date Format MM/dd/yyyy	Seperator SPACE	Time Format HH:MM
<input type="checkbox"/> Include cleared activities	<input checked="" type="radio"/> Comma Delimited <input type="radio"/> TAB Delimited		
<input type="checkbox"/> Include Date with note text. <input checked="" type="checkbox"/> Include User Name with note text.	<input checked="" type="checkbox"/> Run in Evaluation Mode    Size 200		
Split Text over 100000 Rows OR 50 MegaBytes	<input type="checkbox"/> Combine Phone and Ext. with Text String		
<input checked="" type="checkbox"/> Add Phone Country Code    Except for: 1	Drop fields with less than 1 entries		
Create Accounts using Name plus <input checked="" type="radio"/> None <input type="radio"/> State <input type="radio"/> City <input type="radio"/> Zip/PC			
Combine into single contact field: <input type="checkbox"/> Note <input type="checkbox"/> History <input type="checkbox"/> Note/History	This option allows you to specify how contacts are assigned to Accounts None -- only the Contact/Company Name is used Zip -- the Contact/Company Name + Zipcode is used State -- the Contact/Company Name + State is used City -- the Contact/Company Name + City is used  If the contact is assigned to an ACT! Company, the ACT! Company is always used.  Default is None The Contact/Company Name is the data contained in the Company field on the ACT! Contact tab.		

ENGLISH (UNITED STATES)

## Filters

The selections on Filters tab allow you to specify which data is exported. The settings on this tab are “sticky” so they will remain set each time you run Exporter for the database.

Item Number	Description
1	History types to include If you want to include only certain types of History records, click the <b>Selected Types</b> button and choose the items from the list. To select multiple items, hold the Ctrl key and click the item you want to select
2	Groups to include To export contacts only in specific groups, select the <b>Selected Groups</b> button and chose from the list. To select multiple items, hold the Ctrl key and click the item you want to select
3	Table Date Filters The data for each table can be filtered to Export All data, Exclude All data or select data where the date is within a given range.

## User ReMap

Frequently not all ACT! users will transfer to a new target system; the Map Users tab allows you to specify how users will be reassigned. The field X\_MapToRecord\_Manager is created for all records which contains the mapped record owner.

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	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Betty Browner	U6689D53A-6FC8-492E-873A-641E2059BA72	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Chris Huffman	U01FDA2DF-92FD-402F-A433-068640F245B7	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Christine Niquette	U5E096DE5-DABF-45E9-8FAD-86816FC005A3	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Crystie Morgan	U3D02B43C-7C3C-44B5-AA1F-88712B3D519C	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Customer Service	UBBB6415C-C153-4884-9E3F-39E92597BD68	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Gloria Grant	UE0D8674B-998F-44F2-8E3E-5D71C5680E99	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Jim Nellis	U1EBACAFF-51E2-4C1D-9B9A-F86A5326AE42	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Kayla Danforth	UB4C2BECE-E220-4948-97DE-98C36F89144D	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Linda	UB47E2183-05E4-492D-B78E-5F490D1453CA	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Melissa Pearce	UFD540A2D-A131-41B3-947B-1B9DFA826597	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Odette Eddy	UE0AE1428-4AC4-4908-B92F-C0FEB2A5AB71	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Ray Miner	UC292B063-7C25-4484-B240-99CE5C682EFB	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Sarah Whiting	UD9C02DC2-3B07-48E6-8335-9AC969A66AAB	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2

**For the ZOH0 and Salesforce type exports, the Mapped To data is put into the OwnerID field for import.**

## EXPORT FILE TYPES

### Access Database (ACT! 2005 and above only)

All tables are exported into an Access database. The relationships between the tables are setup. Access must be on your system.

**Exporter will use the version of Access that is present on the system where it is being run. Files created using Access 2007 cannot be opened with earlier versions of Access. So, if you intend to use the Access database created by Exporter on a different system, you need to be certain that all systems are at the same version of Access.**

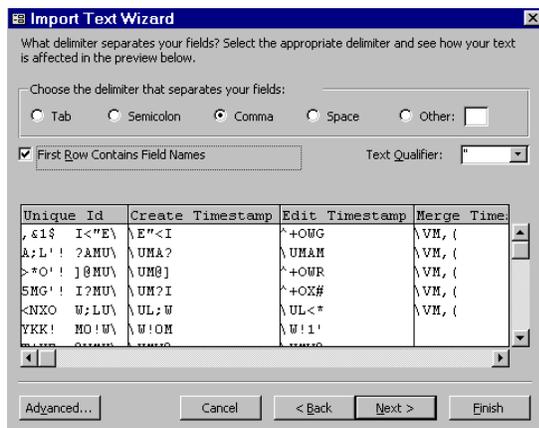
### CSV/Excel

All tables are exported in windows standard comma or Tab delimited format.

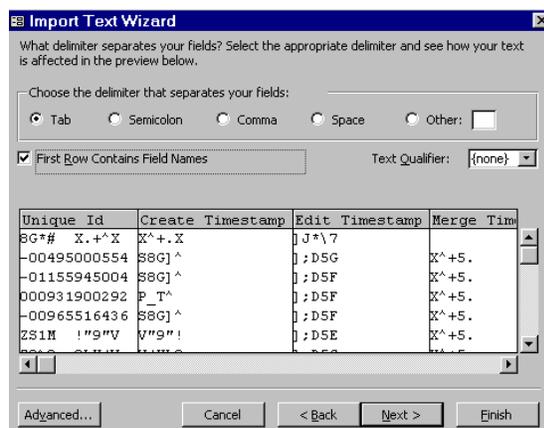
In the comma delimited format, the fields are qualified with a quote mark (“). If there are quote marks within the field they are doubled. This is standard .csv format. Excel will open the file directly.

In the Tab delimited mode, there are no qualifiers.

#### *Comma Delimited import example*



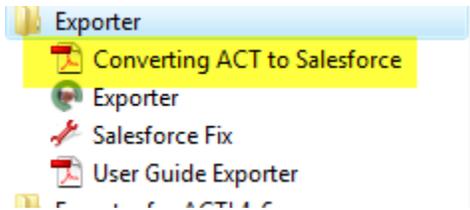
#### *Tab Delimited import example*



**We have found that the .csv file format is more reliable than tab delimited when importing into Microsoft applications.**

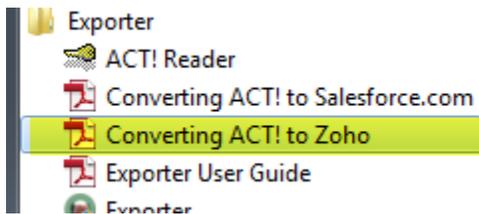
## Salesforce.com (ACT! 2005 and above only)

The ACT! database will be converted into files that can be easily imported into Salesforce.com. There is a separate detailed guide with step-by-step instructions to load the data into Salesforce.com. It can be found in the Exporter group on the start menu or on our web site in the Resources section.



## ZOHO (ACT! 2005 and above only)

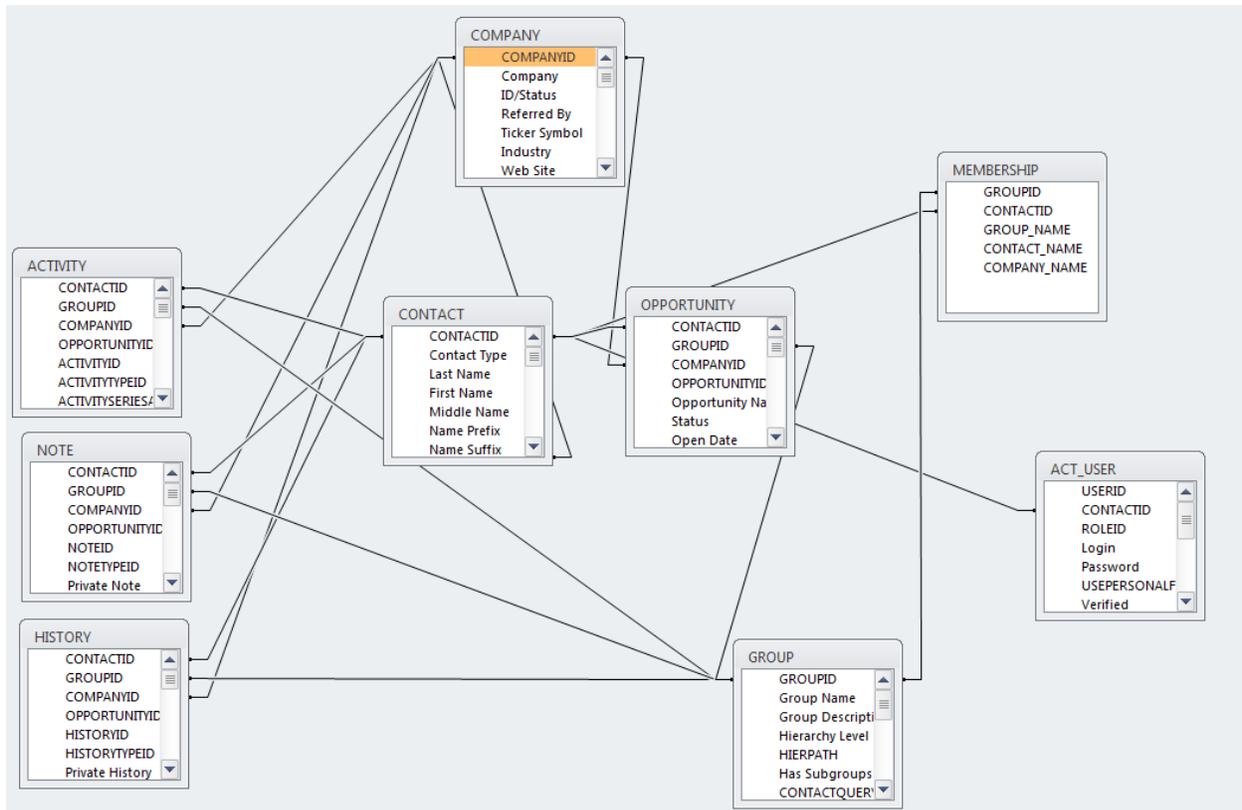
The ACT! database will be converted into files that can be easily imported into ZOHO.com. There is a separate detailed guide with step-by-step instructions to load the data into ZOHO.com. It can be found in the Exporter group on the start menu or on our web site in the Resources section.



## RELATING THE EXPORTED DATA

The data is exported into several files. These files are linked together by a uniqueID field. For the Access export type, the links are established as part of the exported database. For the other types of export types, 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 following diagram illustrates how the tables are linked

### Relationship Diagram



**For additional information about the ACT! table and field definitions, you can download the Data Dictionaries for the SQL based databases from the Resource section of our web site.**

## FIELDS CREATED 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.

## APPENDIX A – THE EXPORTED FILES/TABLES

<b>Account</b>	This is a table created for the CSV, Salesforce and ZOHO export types. It is created using the ACT! Company record or one created by using the data in the Company field of the Contact record combined with the State, City or Zip.
<b>Company</b>	These are the Company records as created in ACT!
<b>Opportunity</b>	Opportunity records can be independent or related to Groups, Companies or Contacts. Each Opportunity can have zero, one or more ProductServices records. Opportunity records can have related Notes, History, and Activity.
<b>Group</b>	The base table for Group entity records. Group records can have related Notes, History, Activity and Opportunity records
<b>Contact</b>	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
<b>Secondary Contacts</b>	Contains data entered in the Secondary Contact tab. Related to Contact table via the ContactID. Entries do NOT have any related records.
<b>Notes</b>	Contains the Note record which can be associated to one or more of any of the ACT! entities – Contact, Group, Company, Opportunity
<b>History</b>	Contains the History record which can be associated to one or more of any of the ACT! entities – Contact, Group, Company, Opportunity
<b>Activity</b>	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
<b>Membership</b>	A relational list of ContactID and GroupID records. Groups contain multiple Contacts and a Contact can be in multiple Groups
<b>Relationships_Contact</b>	A related list of ContactIDs. Established by the user entered on the Relationships tab.
<b>Account_Parent</b>	A related list of Account hierarchy.
<b>Product</b>	A product can be either an actual item or service.
<b>Opportunity-ProductService</b>	Opportunity line items. Associated to the Opportunity item.
<b>Sales_Stage</b>	A definition table. Used in the Opportunity record Stage field
<b>Picklist</b>	A definition table. Contains the items for fields defined a Picklists.
<b>CampaignResults</b>	Contains the data in the Campaign Results table.
<b>Attachments</b>	Attachments are stored outside the database and linked to the history record that created them. The Attachment_FileName in the History.csv file contains the unique name of the attachment which is stored in the Attachment Folder.

## APPENDIX B – ACCOUNTS

Many contemporary CRMs use Accounts which are like ACT! Companies. Some, such as Salesforce, requires 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. The UniqueID for the Company will be placed in the AccountID field in the Contact.csv file. For the ZOHO and Salesforce extracts, this will begin with the letter X.
- 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 the account. All contacts with the same Company Name will be assigned to the created Account. The AccountID for Accounts created by the Exporter will begin the letter A. There are additional controls for building the Accounts available in the Custom Control tab.
- 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.**