

Converting from Sage ACT! to Zoho[®]

Using Exporter[®]

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Getting Started

The following is a step by step guide to help you transfer your ACT! database into Zoho. Using the Zoho Migration Tool, you will be able to import

- All Contact data with custom ACT! fields
- Accounts created from ACT! company (2005+) and contact records
- Notes from ACT!
- Histories from ACT!
- Tasks from ACT!
- Opportunities from ACT!
- Group Membership information for each contact

Before you Begin

You need to make certain your ACT! database is free of duplicate records, does not contain blank records and contains only the data you want to bring into Zoho. ACT! had some basic clean-up tools. Depending on the version, you can check for duplicates, mass delete records that are older than a given date etc.

Step 1 -- Export the ACT! data using Exporter

Start the *Exporter*

There is a separate User Guide for the Exporter. It is recommended that you read it before proceeding.

Select the following options

1. Select the version of your ACT! database.
2. Select the **ZOHO** option .
3. Select the SQL Server Instance you are using to read the database (This is required for ACT! 2005+ and above. *See Exporter User Guide for more information*)
4. Browse to your ACT! database and select it
5. Browse to the folder where the exported data will be saved and select it

Click the **Export** button

Exporter Version 11.10.4

Help

Setup Custom Controls Filters

1 What's the ACT! version?
ACT! 2005-2010(7-12)

2 What type of output do you want?
ZOHO

3 What SQL instance are you using to read your ACT! database?
LK-VOSTRO200\ACT7

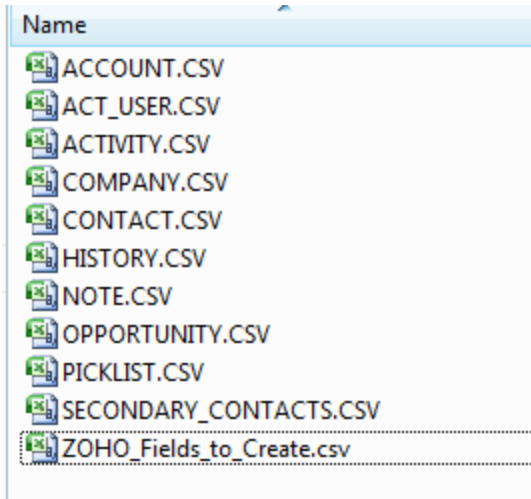
4 Where is your ACT! database?
C:\ACT_TEST_FILES\COPYACT2012DEMO.ADF Browse...

5 Where will the exported data be saved?
C:\ACT_TEST_FILES\ Browse...

Export ***Filters are Set!

Files Exported

When the Exporter software completes, there will be a folder named Zoho located in the path specified in Step 5. In this folder there will be several files, all with a .csv extension. These are the files you will use to migrate from ACT! to Zoho.



In addition to the migration files, there will be files named ZOHO_Fields_to_create.CSV and PICKLIST.CSV. These files contain information you will need to add the user fields from ACT! into Zoho

- **ZOHO_Fields_to_Create** – this file contains a list of the fields from ACT! that you will need to create in Zoho. Fields not on this list have been pre-mapped into standard Zoho fields.

A screenshot of a CSV file named SF_Fields_to_create.csv. The table has 5 columns: A, B, C, D, and E. Row 1 is the header: CDB Fields to Create, Field Type, Field Length, Populated Count. Rows 2-9 list various fields with their types, lengths, and counts.

	A	B	C	D	E
1	CDB Fields to Create	Field Type	Field Length	Populated Count	
2	ACT_AccountID	Text	150	205	
3	ACT_ContactID	Text - External ID	150	205	
4	ACT_CreateDate	Date	8	205	
5	ACT_EditDate	Date	8	205	
6	ASI No	Text	20	4	
7	Account No	Text	50	3	
8	Alt Address 1	Text	254	6	
9	Alt Address 2	Text	254	7	

- **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 Zoho, you can open the file in Excel. You will be able copy and paste the values in the Items cell for the field into the Picklist for the Zoho field.

The screenshot shows an Excel spreadsheet with a list of fields and their corresponding items. The 'Accountant' item is highlighted in the 'ITEMS' column. A callout box points to the 'Accountant' item with the text 'Copy these items into the Salesforce drop-down list'.

	A	B	C	D	Mu
1	DISPLAY_NAME	ITEMS	ITEM_COUNT	LONGEST_ITEM	
2	Address Type	Business	3	8	
3	City	Abingdon	1165	17	
4	Country	Albania	236	28	
5	Email Type	E-Mail 2	4	8	
6	ID/Status	Accountant	15	30	
7	Industry	Automotive/Aerospace	20	24	

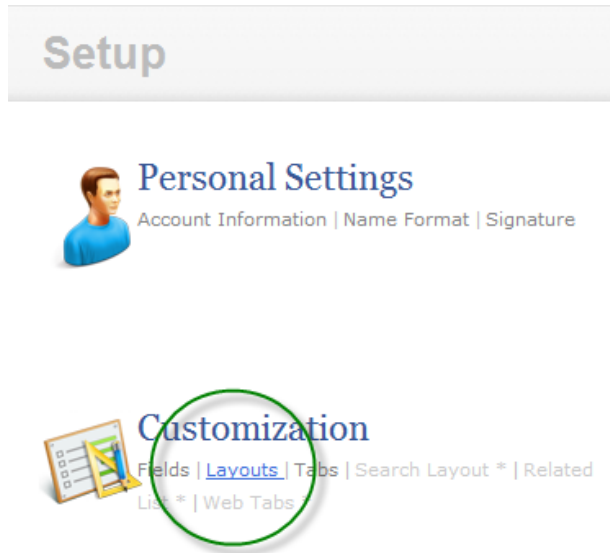
All the CSV files can be opened with Excel by double clicking on the file icon. We recommend that you print the ZOHO_Fields_to_create file so you can work with it when adding fields to Zoho.

Step 2 -- Customize Zoho

You will probably not want to add all ACT! fields to Zoho. However, we strongly recommend that you add the ACT_CONTACTID and the ACT_ACCOUNTID. This will insure that you can link back to your ACT! Database if required.

Adding a section to you Zoho layout for the custom fields

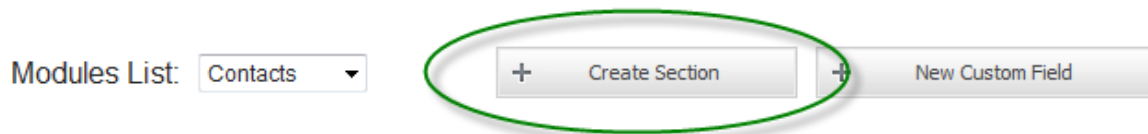
As a first step, we recommend that you add sections to your Zoho Page Layout. To do this, go to the Setup screen. Then select the CRM Module you are customizing. Then select Edit Page Layout.



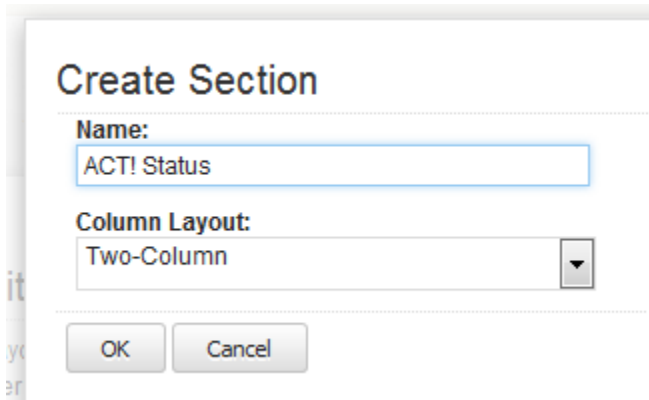
We recommend adding sections for each tab you have in ACT! hat contains your custom user fields. The minimum we suggest are two -- ACT! Status and ACT! User Fields.

Contacts : Edit Page Layout

Customize the page layout by changing the order of the columns and fields, marking fields as mandatory, adding or rer drop the section header to reorder the sections. You need to drag and drop the fields to move them to the List of Remov



Create a name for the Section



Create Section

Name:
ACT! Status

Column Layout:
Two-Column

OK Cancel

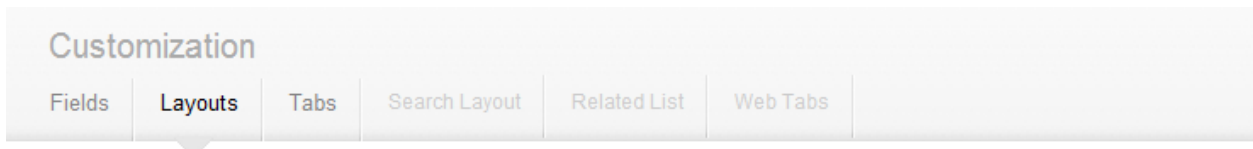
Continue until you have completed all the sections to be added.

When you're done, select the Save button at the bottom of the page.



Adding a custom field to the Zoho Contact Record

From the same location you selected the Edit Page Layout, select the Fields List option.



Contacts : Edit Page Layout

Customize the page layout by changing the order of the columns and fields, marking fields as mandatory, adding or removing the drop the section header to reorder the sections. You need to drag and drop the fields to move them to the List of Removed Fields

Modules List: Contacts

+ Create Section

+ New Custom Field

Add the information about your custom field

Select the Field Type for your new field. This will be specified on the Fields to Create list created by the Exporter software. If you are adding a Pick List item, the Pick List Values will be in the Items column in the PickList.csv file. You can open this file and cut and paste the information into the Zoho Pick List Values box. Click the Save button at the bottom of the screen to save the information. The new field will be displayed in the section you selected in the Section Name box.

Contacts: Create Custom Field

Field Information

Select Field Type:

- ab| Text
- 99 Integer
- % Percent
- 0.00 Decimal
- ⌘ Currency
- i Date
- DateTime
- Email
- Phone
- Pick List**
- URL
- TextArea
- Checkbox
- Multiselect Pick List
- Auto Number
- 9..9 Long Integer

Provide Field Details:

Label: ID/Status

Section Name: ACT! User Fields

Pick List Values:

- Qualified Lead
- Reseller
- Resource
- Retailer
- Supplier
- Vendor
- Warm Lead
- Wholesaler

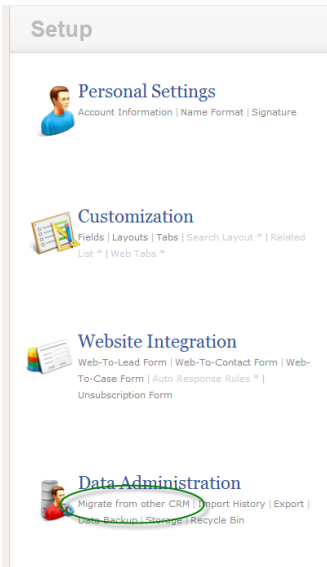
Use first value as default value.

Repeat the above steps until you've added all the fields from ACT!

Step 3 -- Migrate your data

Start the Zoho Migration wizard

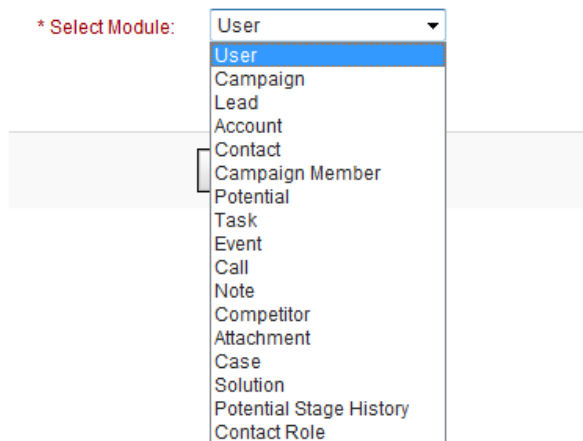
From the Data Administration section on the Setup page, select the **Migrate Data from other CRM** option



You will see a list of modules for migration. This is also the order you should migrate your data.

Data Migration Wizard

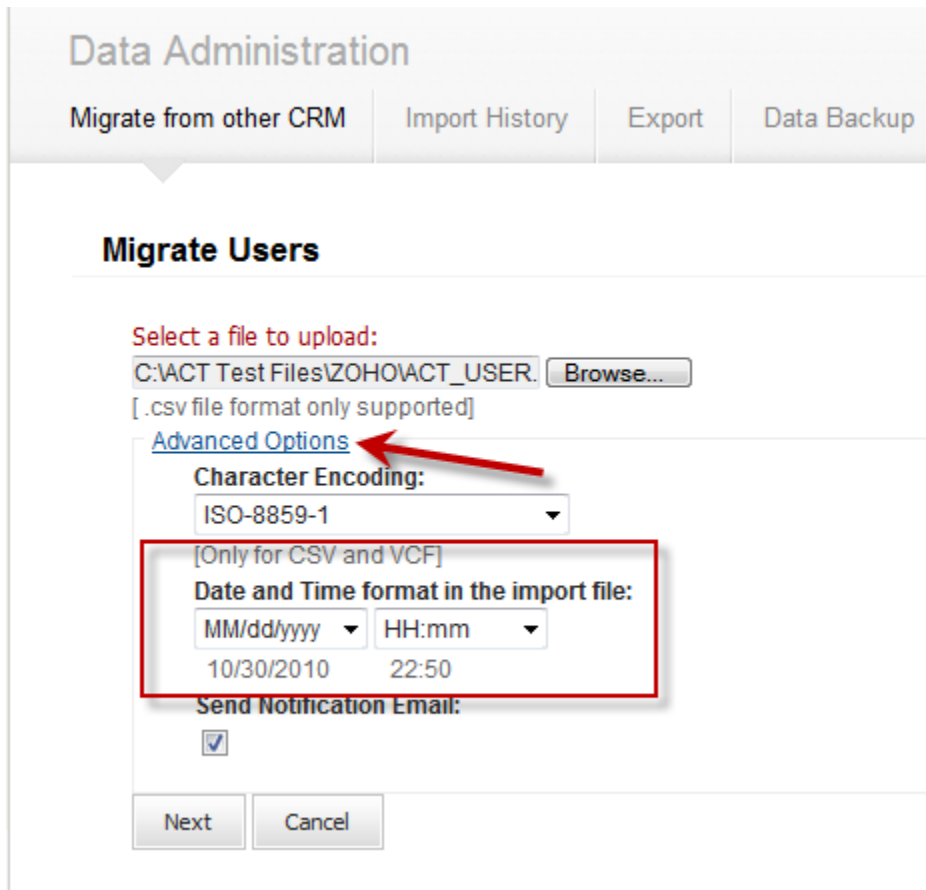
This page helps you to migrate data from other CRM systems to your Zoho CRM account.



The Users should always be brought in first. This will allow the individual records from ACT! to be assigned to the proper manager.

Specify the input file

Locate the input file for the Zoho module.



Data Administration

Migrate from other CRM | Import History | Export | Data Backup

Migrate Users

Select a file to upload:
C:\ACT Test Files\ZOHO\ACT_USER.
[.csv file format only supported]

[Advanced Options](#)

Character Encoding:
ISO-8859-1

[Only for CSV and VCF]
Date and Time format in the import file:
MM/dd/yyyy HH:mm
10/30/2010 22:50

Send Notification Email:

Specify the date format. The Exporter software will always put the date in mm/dd/yy hh:mm. This Zoho option will revert to its default (YYYY/mm/dd HH:mm:ss) for each import. So check this carefully before proceeding. The Exporter date format is consistent with the format used with your system's Region and Language settings.

Check the field mapping

The Exporter software re-labels the ACT! fields to match the corresponding Zoho fields. However, not all ACT! fields will map to Zoho fields. You can either ignore these fields or add custom fields to the object. At the end of the mapping display sequence, Zoho will provide a list of fields that were not mapped. Check this to be certain that you haven't missed any important data. If all is OK, Click the Import Now! Button and your data will load.

Migrate Users

* Required Field(s)

Map Fields:

Map the Zoho CRM field names with the appropriate column names of the source file that you import.

User Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
* User Id : User Id(Col: 7) ▼	* Email Address : Email Address(Col: 4) ▼
First Name : First Name(Col: 5) ▼	* Last Name : Last Name(Col: 6) ▼
Alias : Alias(Col: 2) ▼	Phone : None ▼
Mobile : None ▼	URL : None ▼
Fax : None ▼	

Address Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Street : None ▼	City : None ▼
State : None ▼	Country : None ▼
Zip : None ▼	

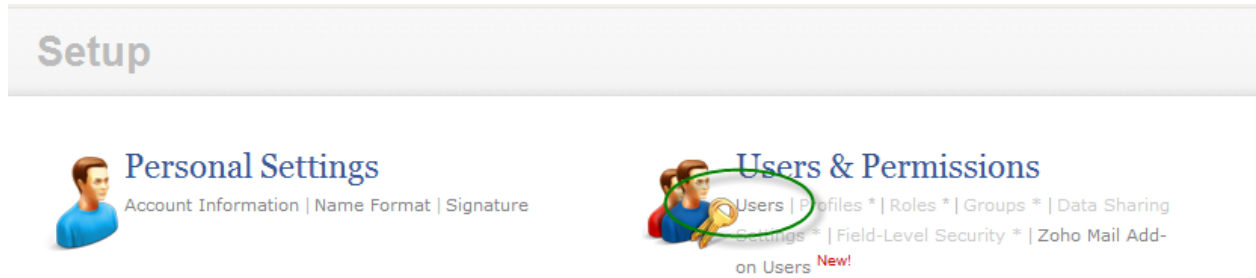
Previous

Next

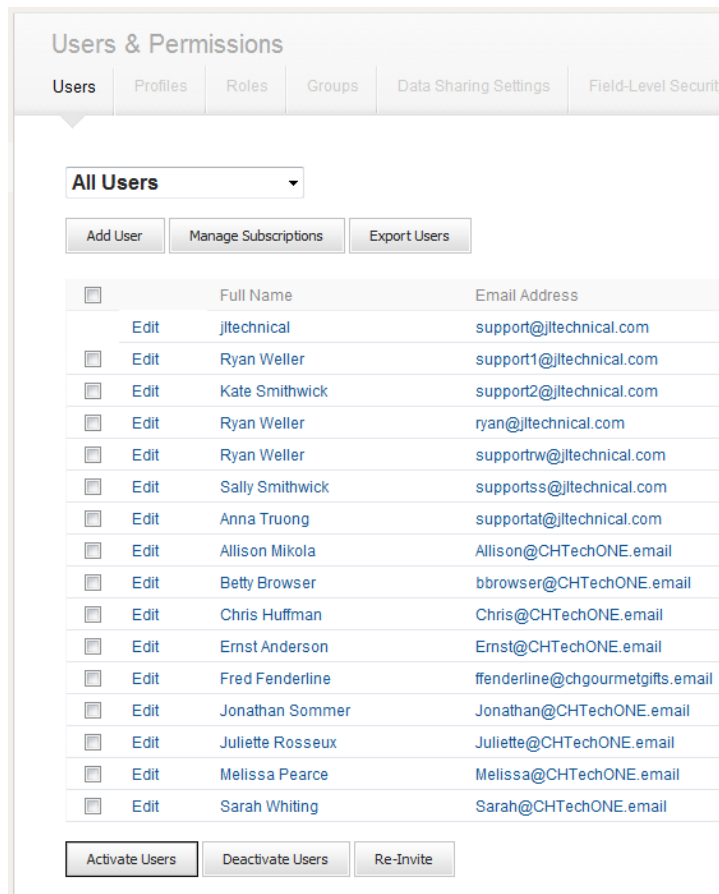
Cancel

CHECK AND RECHECK HOW EACH FIELD IS MAPPED!

Verify that all the users were migrated properly. To do this select Users from the Setup screen.



Display All Users. This will let you verify that all users from ACT! have been entered.



Migrating the Accounts, Contacts, Activities, History, Notes etc. Records

If you are using the Account/Contact model, to manage your customers, the next step is to migrate the Account records. Exporter will create this file for you. It uses your company records from ACT! and when there is no Company record for a Contact, the Exporter software will create one.

Exporter will rename the ACT! fields to match the Zoho field name.

Migrate Accounts – Account.csv

Map the Zoho CRM field names with the appropriate column names of the source file that you import.

Account Owner Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Account Owner Id:	Account Owner ID(Col: 1) ▼

Account Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
* Account Id:	ACCOUNTID(Col: 2) ▼
* Account Name:	ACCOUNTNAME(Col: 3) ▼
Account Site:	None ▼
Parent Account Id:	None ▼
Account Number:	None ▼
Account Type:	None ▼
Industry:	None ▼
Annual Revenue:	None ▼
Created By Id:	Created By ID(Col: 11) ▼
Created Time:	Created Time(Col: 12) ▼
Rating:	None ▼
Phone:	Phone(Col: 16) ▼
Fax:	FAX(Col: 13) ▼
Website:	WebSite(Col: 20) ▼
Ticker Symbol:	None ▼
Ownership:	None ▼
Employees:	None ▼
SIC Code:	None ▼
Modified By Id:	Modified By ID(Col: 14) ▼
Modified Time:	Modified Time(Col: 15) ▼

Address Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Billing Street:	Billing Street(Col: 10) ▼
Billing City:	Billing City(Col: 6) ▼
Billing State:	Billing State(Col: 9) ▼
Billing Code:	Billing Code(Col: 7) ▼
Billing Country:	Billing Country(Col: 8) ▼
Shipping Street:	None ▼
Shipping City:	None ▼
Shipping State:	None ▼
Shipping Code:	None ▼
Shipping Country:	None ▼

Description Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Description:	None ▼

ACT! Status

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
ACT_AccountID:	ACCOUNTID(Col: 2) ▼
ACT_RecordManager:	ACT_RecordManager(Col: 5) ▼

Check the import status before proceeding

You will receive an e-mail and you can also check the status of migration by viewing the Import History. At this point, you should carefully check the data that was migrated. If you are not satisfied with the import, you can select the Rollback button.

DO NOT remove the migrated records any other way. They will not re-import properly if you do.



Data Administration

Migrate from other CRM | **Import History** |
Export | Data Backup | Storage | Recycle Bin

Import History

This page displays the history of imported files. To permanently save imported records, select them and click on Confirm. To delete imported records, select them and click on Rollback. By default, Zoho CRM allows 30 days Rollback after which you can neither Rollback nor access history of the imported file(s).

List of Imports:

<input type="checkbox"/>	Import File Name	Import Type	Imported By	Imported Time	Status	Records
<input type="checkbox"/>	ACCOUNT.CSV	Accounts	jitechnical	10/13/2011 09:06 PM	Completed	141 added

Rollback

Confirm

After migrating the Account records, you can proceed with the Contacts, Activity etc. The following are examples of each data types.

We recommend migrating the History records as Completed Tasks. This will mean that you will have two migrations into the Task object. One for open Tasks (no Status field) and one for History records (Status field contains Completed).

Migrate Contacts – Contacts.csv

Migrate Contacts

* Required Field(s)

Map Fields:

Map the Zoho CRM field names with the appropriate column names of the source file that you import.

Contact Owner Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Contact Owner Id: <input type="text" value="Contact Owner ID(Col: 9)"/>	

Contact Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
* Contact Id: <input type="text" value="Contact ID(Col: 8)"/>	Lead Source: <input type="text" value="Referred By (Contact)(Col: 51)"/>
First Name: <input type="text" value="First Name(Col: 18)"/>	* Last Name: <input type="text" value="Last Name(Col: 30)"/>
Account Id: <input type="text" value="ACT_AccountID(Col: 2)"/>	Vendor Id: <input type="text" value="None"/>
Email: <input type="text" value="Email(Col: 15)"/>	Title: <input type="text" value="Title(Col: 56)"/>
Department: <input type="text" value="Department(Col: 14)"/>	Phone: <input type="text" value="Phone(Col: 50)"/>
Home Phone: <input type="text" value="Home Phone(Col: 21)"/>	Other Phone: <input type="text" value="None"/>
Fax: <input type="text" value="Fax(Col: 17)"/>	Mobile: <input type="text" value="Mobile(Col: 42)"/>
Date of Birth: <input type="text" value="Date of Birth(Col: 13)"/>	Assistant: <input type="text" value="None"/>
Asst Phone: <input type="text" value="None"/>	Reports To: <input type="text" value="None"/>
Created By Id: <input type="text" value="Created By ID(Col: 10)"/>	Modified By Id: <input type="text" value="Modified By ID(Col: 43)"/>
Created Time: <input type="text" value="Created Time(Col: 11)"/>	Modified Time: <input type="text" value="Modified Time(Col: 44)"/>
Email Opt Out: <input type="text" value="None"/>	Skype ID: <input type="text" value="None"/>
Salutation: <input type="text" value="Salutation(Col: 52)"/>	Add to QuickBooks: <input type="text" value="None"/>
ContactID: <input type="text" value="Contact ID(Col: 8)"/>	Commission: <input type="text" value="None"/>
Company: <input type="text" value="Company(Col: 7)"/>	E-Mail_Secondary: <input type="text" value="None"/>
Group Membership: <input type="text" value="Group Membership(Col: 20)"/>	ID/Status: <input type="text" value="ID/Status(Col: 22)"/>
Secondary Email: <input type="text" value="None"/>	ACT_ContactID: <input type="text" value="Contact ID(Col: 8)"/>
ACT_Record Manager: <input type="text" value="ACT_RecordMgr(Col: 5)"/>	

Address Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Mailing Street: <input type="text" value="Mailing Street(Col: 38)"/>	Other Street: <input type="text" value="Other Street(Col: 48)"/>
Mailing City: <input type="text" value="Mailing City(Col: 35)"/>	Other City: <input type="text" value="Other City(Col: 45)"/>
Mailing State: <input type="text" value="Mailing State(Col: 37)"/>	Other State: <input type="text" value="Other State(Col: 47)"/>
Mailing Zip: <input type="text" value="Mailing Zip (PostalCode)(Col: 39)"/>	Other Zip: <input type="text" value="Other Zip (PostalCode)(Col: 49)"/>
Mailing Country: <input type="text" value="Mailing Country(Col: 36)"/>	Other Country: <input type="text" value="Other Country(Col: 46)"/>

Description Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Description: <input type="text" value="None"/>	

Migrate Secondary Contacts – Secondary_Contacts.csv

Migrate Contacts

* Required Field(s)

Map Fields:

Map the Zoho CRM field names with the appropriate column names of the source file that you import.

Contact Owner Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Contact Owner Id: Contact Owner ID(Col: 8) ▼	

Contact Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
* Contact Id: Contact ID(Col: 7) ▼	Lead Source: None ▼
First Name: First Name(Col: 12) ▼	* Last Name: Last Name(Col: 22) ▼
Account Id: ACT_AccountID(Col: 2) ▼	Vendor Id: None ▼
Email: Email(Col: 11) ▼	Title: Title(Col: 34) ▼
Department: None ▼	Phone: Phone(Col: 30) ▼
Home Phone: None ▼	Other Phone: None ▼
Fax: Business FAX(Col: 5) ▼	Mobile: Mobile(Col: 28) ▼
Date of Birth: None ▼	Assistant: None ▼
Asst Phone: None ▼	Reports To: Reports to(Col: 33) ▼
Created By Id: Created By ID(Col: 9) ▼	Modified By Id: None ▼
Created Time: Created Time(Col: 10) ▼	Modified Time: Modified Time(Col: 29) ▼
Email Opt Out: None ▼	Skype ID: None ▼
Salutation: None ▼	Add to QuickBooks: None ▼
ContactID: None ▼	Commission: None ▼
Company: Company(Col: 6) ▼	E-Mail_Secondary: None ▼
Group Membership: None ▼	ID/Status: ID/Status(Col: 19) ▼
Secondary Email: None ▼	ACT_ContactID: None ▼
ACT_Record Manager: ACT_RecordMgr(Col: 4) ▼	



Address Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Mailing Street: Mailing Street(Col: 26) ▼	Other Street: None ▼
Mailing City: Mailing City(Col: 23) ▼	Other City: None ▼
Mailing State: Mailing State(Col: 25) ▼	Other State: None ▼
Mailing Zip: Mailing Zip (Postal Code)(Col: 27) ▼	Other Zip: None ▼
Mailing Country: Mailing Country(Col: 24) ▼	Other Country: None ▼

Description Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Description: None ▼	

Migrate Tasks – Activity.csv

Data Administration

Migrate from other CRM | Import History | Export | Data Backup | Storage | Recycle Bin

Migrate Tasks

* Required Field(s)

Map Fields:

Map the Zoho CRM field names with the appropriate column names of the source file that you import.

Task Owner Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Task Owner Id: Task Owner ID(Col: 14)	

Task Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
* Task Id: Task ID(Col: 13)	* Subject: Subject(Col: 12)
Due Date: Due Date(Col: 7)	Contact Name: Contact Name (ID)(Col: 3)
Related To: None	Status: None
Priority: None	Created By Id: Created By ID(Col: 4)
Modified By Id: Modified By ID(Col: 10)	Created Time: Created Time(Col: 5)
Modified Time: Modified Time(Col: 11)	Send Notification Email: None
Recurring Activity: None	

Description Information

Zoho CRM Field: Import Field	Zoho CRM Field: Import Field
Description: Description(Col: 6)	

Previous | Next | Cancel

Migrate Histories – History.csv

Data Administration

[Migrate from other CRM](#)
[Import History](#)
[Export](#)
[Data Backup](#)
[Storage](#)
[Recycle Bin](#)

Migrate Tasks

* Required Field(s)

Map Fields:

Map the Zoho CRM field names with the appropriate column names of the source file that you import.

Task Owner Information

Zoho CRM Field: Import Field Zoho CRM Field: Import Field

Task Owner Id:

Task Information

Zoho CRM Field: Import Field Zoho CRM Field: Import Field

* Task Id: * Subject:

Due Date: Contact Name:

Related To:

Priority: Created By Id:

Modified By Id: Created Time:

Modified Time: Send Notification Email:

Recurring Activity:

Description Information

Zoho CRM Field: Import Field Zoho CRM Field: Import Field

Description:

Migrate Notes – Notes.csv

Data Administration

[Migrate from other CRM](#)
[Import History](#)
[Export](#)
[Data Backup](#)
[Storage](#)
[Recycle Bin](#)

Migrate Notes

* Required Field(s)

Map Fields:

Map the Zoho CRM field names with the appropriate column names of the source file that you import.

Note Owner Information

Zoho CRM Field: Import Field Zoho CRM Field: Import Field

Note Owner Id:

Import Options

Select the option whether you like to import by Parent entity Id or the Parent entity name of Notes.

Import by Parent entity Id of Notes Import by Parent entity name of Notes

Note Information

Zoho CRM Field: Import Field Zoho CRM Field: Import Field

* Note Id: * Note Title:

Note Content: * Parent Id:

Created By Id: Modified By Id:

Created Time: Modified Time:

Checking the Final Migration

Your Import History will display all the files you attempted to import and any errors that occurred.

Import History

This page displays the history of imported files. To permanently save imported records, select them and click on Confirm. To delete imported records, select them and click on Rollback. By default, Zoho CRM allows **30 days** Rollback after which you can neither Rollback nor access history of the imported file(s).

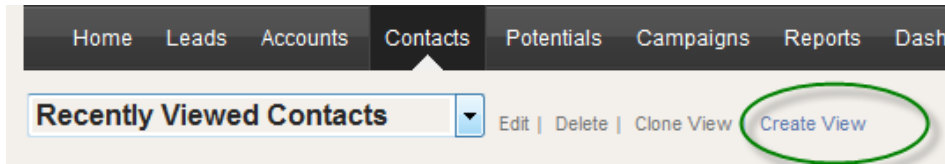
List of Imports:

<input type="checkbox"/>	Import File Name	Import Type	Imported By	Imported Time	Status	Records
<input type="checkbox"/>	NOTE.CSV	Notes	jltechnical	11/08/2011 07:24 PM	Completed	73 added
<input type="checkbox"/>	HISTORY.CSV	Tasks	jltechnical	11/06/2011 04:43 PM	Completed	1701 added
<input type="checkbox"/>	ACTIVITY.CSV	Tasks	jltechnical	11/06/2011 03:55 PM	Completed	578 added
<input type="checkbox"/>	CONTACT.CSV	Contacts	jltechnical	11/06/2011 03:48 PM	Completed	199 added 2 skipped
<input type="checkbox"/>	ACCOUNT.CSV	Accounts	jltechnical	11/06/2011 03:46 PM	Completed	141 added

Groups

Zoho doesn't have the same concept as ACT! groups. However, you can simulate the function of ACT! Groups by creating Views in Zoho.

From the Contacts Page, Select Create View.



You can name the View the same as your ACT! group.

Create New View

View Name:

Choose Columns:

Available Columns:		Selected Columns:
Company		First Name
E-Mail_Secondary		Last Name
Group Membership	<input type="button" value="Add"/>	Phone
ID/Status		Email
Secondary Email		Group Membership
ACT_ContactID		
ACT_Record Manager		
Address Information		
Mailing Street		
Other Street		
Mailing City		
Other City		

Specify Criteria:

Criteria Pattern=1

Depending on how you used ACT! Groups, you might want to consider using Zoho's Campaign feature. You will find detailed information in the Zoho User Guide.