

## **Allied Financial Software Knowledgebase**

### **How to Import Contact Data From a Text Delimited File (\*.TXT or \*.CSV) into an ACT! Database**

#### Question

You have information in a CSV or Text Delimited file that you want to import in to an existing ACT! database.

#### Answer

Note: Before proceeding, it is strongly recommended that you perform a backup of the destination database. In ACT go to File, Backup, choose a location...

Before merging databases, it is imperative to verify the duplicate matching criteria in the database you will be importing to. Follow the steps below:

#### Duplicate Matching Criteria:

1. Click the Tools menu, and then click Preferences. The Preferences dialog box appears:
2. Under the General Tab, click the Duplicate Checking button. The Duplicate Checking dialog box appears; prompting you to verify the fields and the field order that will best distinguish duplicate contacts in the databases you will be merging.

Note: Browse users will not have access to this feature.

3. Click OK to close the Duplicate Checking dialog box and save the settings.

Note: To import a Comma Delimited text file into ACT!, each field is required to be marked with quotation marks. If you were to open a standard Comma Delimited file in Notepad it would look similar to this (each line is one contact):

```
"Chris Huffman" , "Cordoba Coffee" , "400 Madison Avenue" , "New York" , "New York"
"Bob Smith" , "Smith Bakery" , "1300 Quaker Street" , "Springfield" , "Oregon"
"Robert Actman" , "Active Roasters" , "20 Hidden Lane" , "Savannah" , "Georgia"
```

A Tab Delimited file uses Tabs to separate fields and rows.

ACT! import also requires that any Text Delimited file have either a .txt or .csv file extension. If necessary, change the file extension to .txt. For example, if the original file name is named Data.dat, change the file name to Data.txt.

#### Importing Text Delimited Contacts:

After verifying the duplicate matching criteria you are ready to begin the import process.

Follow the steps below to import Text Delimited Contacts into an ACT! database:

1. Open the database that you will be using as the destination database.
2. Click the File menu, and then click Import. The Import Wizard launches.
3. If the Welcome to the Import Wizard dialog box appears, enable the Check to hide in the future option (if desired), and then click Next. The Specify Source dialog box appears:

4. Ensure that Text Delimited is displayed in the What type of file do you want to import? field.
5. Click the browse button to the right of the File name and location field. An Open dialog box appears.
6. Navigate to (if necessary), click the text delimited file (.txt or .csv) you would like to import, and then click Open.
7. Click Next. The Specify record type(s) dialog box appears:
8. Enable the radio button for the kind of records you would like to imported from the source file; Contact Records, Group Records, or Company Records, and then click Next. The Specify Import Options dialog box appears:
9. Enable the appropriate field separator in the text file (CSV is usually Comma separated).

Important Note: If the Yes, import the first record option is enabled while importing a Text Delimited file, the Contact Map will NOT display correctly. This is a known issue that is under investigation. Please be sure to clear this option.

10. Click Next, the Contact Map, Group Map, or Company Map dialog box appears depending which option you choose in the Specify record type(s) window:

11. The Map from this field column represents the fields in the Text Delimited (source) file you are importing. The To this field column represents the fields in the current (destination) ACT! database. Complete the mapping by ensuring the To this field column has an entry for each field that you wish to receive data into. If a field is not mapped in the To this field column, any data in the source field will not be imported into the ACT! database. To change the mapping of a particular field, click in the To this field column, and then click the desired field from the drop-down.

If the source column does not list entries as expected, click the advance button to advance to the next record in the source file. You may need to click this button several times to find a record from the source file that will give you complete mapping information.

12. When all fields have been mapped as desired, click Next. The Specify Merge Options dialog box appears:

Note: you can only map a field to one other field, selecting the field again in this list will remove the first selection.

Note: Enabling the Confirm each match option will create a warning for any Contact that matches on two or more duplicate checking criteria fields, if you have many records in either database that will match your duplicate criteria, you will be prompted to manually confirm every match. This can cause delays importing a large number of matching records.

13. Click the Merge Options button that correspond to the type of records (Contact, Group or Company) that you are importing. The Merge Options dialog box appears.

If source records match destination records (according the your Duplicate Matching Criteria), merge options allow you to combine the data in duplicate records, replace with the newest data, replace with the source data or leave the data unchanged. This applies only to duplicate records:

Merge - Imports data only into fields that are blank in the destination record

Replace with the newest contact - Populates all fields with the newest data from either record

Replace with the source contact - Replaces all fields with source data

Do not change - Leaves all data in destination record unchanged

Note: If these merge options are not adequate, you may create new fields in the destination database, and map these for the import of your data. Once the data is in the destination database, you can use the Replace feature in ACT! to copy (or swap) data between two different fields in your ACT! database.

The Contact Merge Options provide options on how records will be merged for, Contact records. Click OK to

return to the Specify Merge Options dialog box.

14. When the options have been set, click Next. The Completing Import Wizard dialog box appears:

15. Review your settings, and then click Finish to begin the import process. A progress indicator appears as the text file is imported:

Note: The amount of time required for an import depends upon the amount of data being imported (Contacts, Activities, Notes/History, Opportunities, and so on), the speed of the computer performing the import, and the available network bandwidth if accessing a databases stored on a network drive. Please do not interrupt the process.

<http://kb.actforadvisors.com/questions.php?questionid=153>