<u>Allied Financial Software Knowledgebase</u>

How to Import Data and Retain User Record::Multi-user Import for ACT! by Sage 2007-2010

If you are upgrading an ACT! 6.0 database such as Act4Advisors 1x or 2x, there are two major parts to the upgrade 1.Do a custom conversion to bring the ACT! 6.0 database into the new ACT! SQL format (See the separate document regarding the upgrade conversion. You should have those instructions) 2.Import the converted database above into the new Act4Advisors v3 database (See How to Import Data and Retain User Record instructions below) a.Export existing user's contact records to the new database. These are know in ACT! as the "My Record" b.Open the new Act4Advisors database and make these contact records ACT! Users c.Import all data If you are simply importing your data from an existing ACT! SQL database, #2. above is all you should consider.The step by step instructions are included below. **How to Import Data and Retain User Record: Multi-user Import**

I Exporting User Contact Records (My Records):

1. In ACT, locate your existing database. Go to Lookup, Advanced and choose Users. Go to Tools, Preferences, click on the Duplicate Checking button. Uncheck "Enable duplicate checking for the database." And press OK.

2. Click the File menu, and then click Export. The Export Wizard - Welcome to the Export Wizard dialog box appears.

3. Enable (if desired) the Check to hide in the future option, and then click Next. The Export Wizard - Specify Destination dialog box appears.

4. Choose ACT! Database
5. Click the Browse button at the Filename and location field. An Open dialog box appears.

6. Browse to (if necessary) and Open the new Act4Advisors database (AdvisorXX). The Export Wizard - Specify Destination dialog box reappears with the Filename and location field now populated with the file path to the destination database AdvisorXX.

7. Enter the User Name as ME, and then click Next. The Export Wizard - Specify record type(s) dialog box appears.

8. Ensure that "Contact records" is enabled in the What kind of records would you like to export? section and that Current lookup is enabled in the Which records do you want to export? section, and then click Next. The Export Wizard - Contact Map dialog box appears.

Note: The left (Map this Field) column of the contact map displays the fields in the source database while the right (To this Field) column displays the fields in the destination Act4Advisors database. When exporting to an Empty Copy of the source database, the fields in the left column will match the fields in the right column. BEFORE YOU CLICK ON THE NEXT OR FINISH BUTTON, SAVE YOUR MAP INCASE YOU HAVE TO

REDO THE IMPORT. This will save you time.

Here are some mapping matches for Act4Advisors v1x or 2x upgraders.
Version 2 Converted Name MAP to: Version 3 Field Name
Asst- Title Assistant Title
Birth Date* DO NOT MAP FROM AdvisorConv db
Birthday Event DO NOT MAP
Calc1 and Calc2 DO NOT MAP
Child 1 Month Child 1 Note
Child 2 Month Child 2 Note
Child 3 Month Child 3 Note
Child 4 Month Child 4 Note
Child 5 Month Child 5 Note
Child 6 Month Child 6 Note
Client Birth Month Birth Text
Date of Birth* Birth Date*
Date of Birth Sp* Birth Date Spouse*
Dbchild1-6 DO NOT MAP
Email (1-x)* Personal Email or Email
Intermediate Bond Intermediate Bonds
MailAddress 1 1MailName
OrgPath OrgXPath
Phone** Work Phone**
Policy 1 -1 Policy 1 Num
Policy 2 - Policy 2 Num
Policy 3 - Policy 3 Num
Policy 4 - Policy 4 Num
Policy 5 - Policy 5 Num
Policy 6 - Policy 6 Num
Policy 7 - Policy 7 Num
Policy 8 - Policy 8 Num
Birth Month Spouse Birth Text Spouse

For additional information on importing, consult with your ACT! documentation. If you require a consultant to import your data, feel free to contact us for a quote. If you are uncomfortable importing data, feel free to contact us for our Data Conversion Services. We often convert data from Bill Good, FDP, Brokers Helper, Advisors Assistant, EZ Data, dbCAMS, Junxure, Protracker, Brokers Ally, and even from other ACT! databases. Our fees are based on the time it takes for us to convert the data but the fees are very reasonable.
9. Click Next. The Export Wizard - Specify Merge Options dialog box appears.

10. There is no need to modify Contact Merge Options when exporting to an Empty Copy with only a single temporary contact/user. Click Next. The Completing Export Wizard dialog box appears.

11. If the displayed export options are not correct, click Back to correct the settings, otherwise click Finish. An Exporting Data... progress indicator appears. You can then return to the destination database and create users from the records that were exported.

II - Creating the Users:

1. Open the AdvisorXX database (If prompted to login, you must login as ME and no Password).

Go to Tools> Preferences and click on the Duplicate Checking button.
Uncheck "Enable duplicate checking for the database." And press OK.

Click the Tools menu, and then click Manage Users. The Manage Users - Select a User dialog box appears.

2. Click the Create New User option. The Create New User dialog box appears.

3. Ensure that the Create User from Contact - Create a new User from an existing Contact option is enabled, and then click Next. The Choose Contact dialog box appears with the first contact/user selected.

4. Click Next. The Enter User Information dialog box appears with this name displayed in both the Contact Name and User Name fields.

5. Confirm the login name and add a password (if desired) for this user, change the Security Role to either Manager or Administrator, and then click Next. The Specify Access dialog box appears. (The security role and password can be changed after the import is complete.)

6. Ensure that the Logon Access is set to Active - Pending log on: and disable options for handheld sync and/or accounting link tasks as appropriate and then click Finish. (it is not appropriate to add users to teams at this time) The Select a User dialog box re-appears with the new user information displayed.

7. Repeat steps 2 - 6 for each user. When all users have been created as Active Managers or Administrators, close the Select a User dialog box.

8. Close ACT! and re-open.

9. To delete the temporary user (ME), login as another admin user and choose Tools > Manage Users.Select the user ME and choose Delete User.When asked to Delete records or Reassign, choose Reassign Records and select the current user's record to reassign to.There is no need to keep the current user as a contact so when prompted, go ahead and delete the contact.

III - Importing the Contacts from the Source Database while Retaining the Record Manager:

1. If you wish to transfer all records from the existing database, click the File < Import and then follow the prompts in the Import Wizard.

2. Locate the source database with the Browse button and enter your user name and password (if you have one) to this source database. This is the login to your old ACT! database.

3. Check all boxes above and the Next

5. If you saved a map file from the user export section, click on Load Map. Otherwise, be sure to map fields that are important which are not yet mapped. Save the map file when you are done.

Here are some key fields to make sure that are mapped correctly. These fields are for Act4Advisors v1x or 2x customers only.

Version 2 Converted Name MAP to: Version 3 Field Name
Asst- Title Assistant Title
Birth Date* DO NOT MAP FROM AdvisorConv db
Birthday Event DO NOT MAP
Calc1 and Calc2 DO NOT MAP
Child 1 Month Child 1 Note
Child 2 Month Child 2 Note
Child 3 Month Child 3 Note
Child 4 Month Child 4 Note
Child 5 Month Child 5 Note
Child 6 Month Child 6 Note
Client Birth Month Birth Text
Date of Birth* Birth Date*
Date of Birth Sp* Birth Date Spouse*
Dbchild1-6 DO NOT MAP
Email (1-x)* Personal Email or Email
Intermediate Bond Intermediate Bonds
MailAddress 1 1MailName
OrgPath OrgXPath
Phone** Work Phone**
Policy 1 -1 Policy 1 Num
Policy 2 - Policy 2 Num
Policy 3 - Policy 3 Num
Policy 4 - Policy 4 Num
Policy 5 - Policy 5 Num
Policy 6 - Policy 6 Num
Policy 7 - Policy 7 Num
Policy 8 - Policy 8 Num
Birth Month Spouse Birth Text Spouse

You do not need to map Group, Company, Opportunity, or Product fields unless they were customized in your previous ACT! database.

As you proceed through the Import (or Export) Wizard, it is VITAL that you examine the Contact Merge Options dialog box. The "If source records match destination records" section must be configured to Merge for all options.

Configure the Group Merge Options for If source records match destination records section as follows:

Group records: Replace with source group
Notes: Replace with source
History: Replace with source

Configure the Company Merge Options for If source records match destination records section as follows:

Company records: Replace with source
Notes: Replace with source
History: Replace with source

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