Allied Financial Software Knowledgebase

Basic Outlook Import into ACT!

Go to File and select Import.

What type do you want to import? Choose outlook from the dropdown menu.

Press Next.
Contact Records should be checked.

What contacts do you want to import? Typically it is Outlook Contacts unless you have Exchange Contacts.

Import to My Record.

Names, Addresses, and phone numbers should already be mapped. If you have other fields   please map them to the appropriate place.

Click on Merge Options

Click on Restore Defaults and press OK.

Press Finish.

http://kb.actforadvisors.com/questions.php?questionid=5