

Allied Financial Software Knowledgebase

How To Import Data From Existing ACT! Database (Multi-User)

Please read and execute steps 1, 2, and 3.

Step 1. Install ACT! PreImport.

Step 2. Import Users

Go to Start on your computer, Programs or All Programs, find Act4Advisors and select Act4Advisors User Conversion.

It will ask for the location of your existing database and the location of the new database.

Please log in using the username and password from your old database.

Step 3. Now it's time to import the remaining data into Act4Advisors.

ACT! has an exceptional importing wizard allowing you to import your existing data. You can import an ACT! database, a dBase file, a Microsoft Outlook file, Palm Desktop or an ASCII text file with delimiters like commas or tabs.

To import your existing ACT! data or any other database, open the Advisor database. Click on File, Data Exchange, Import. Be sure to pick the correct file type and browse to where your database is located, Click on the NEXT button.

If you are importing an ACT! 3.0 database or higher, click on Contact and Group records. If you are importing any other database, click on Contacts Only then click the NEXT button.

Choose the importing "MAP" file that corresponds with your data. You may have to scroll to the right to see them. Some MAP files that are included with ACT! are for Goldmine, Maximizer, and many others and are loaded in the Program Files\ACT folder.

Which Map Should I Use?

Select this one : "act standard fields to act4advisors.map"

If you are importing data from another ACT database, we have created two MAP files that direct your BASIC ACT! data fields into the Act4Advisors. The name of the main MAP file is "act standard fields to act4advisors.map" is located under the C:\Program Files\A4A folder. **THIS MAP IS ONLY GOOD IF YOU HAVE NOT MODIFIED FIELDS.** If you choose this map, you will still have to map the rest of your data fields.

Select this one : act top address fields to a4a home address fields.map

If you were using the Address fields at the TOP of your ACT! screen for the contact s Home Addresses, you

will want to alternately use the map file named act top address fields to a4a home address fields.map This maps the Address fields to the home address fields in Act4Advisors.

Other map files included are for Agent Workbench CIM, Laser App and Brokers Ally.

Very Important Note: Whether your "Map" file is located or not, you may still have to map data fields to the appropriate data fields in Act4Advisors. This is quite easy but it may take you a few minutes.

The left column of the contact map screen includes the data fields of your current database. The right hand side column includes the available data fields for Act4Advisors. Simply click in the boxes on the right hand side to choose a data field in Act4Advisors. **BEFORE YOU CLICK ON THE NEXT OR FINISH BUTTON, SAVE YOUR MAP INCASE YOU HAVE TO REDO THE IMPORT.** This will save you time.

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 to convert the data but the fees are very reasonable.

<http://kb.actforadvisors.com/questions.php?questionid=68>