

Allied Financial Software Knowledgebase

How to Export to CSV for Mailing Company

You wish to export an ACT! database to another program that imports text-delimited files. For example, your mailing company or another vendor requires a text-delimited file for their use.

See Movie >

To export ACT! data for use in another program:

Launch ACT!, opening the database you want to export from. Click the File menu, point to Data Exchange, then click Export. The Export Wizard opens. In the File type drop-down list, click Text - Delimited. To the right of the Filename and location box, click the browse button. The Save As dialog appears. In the Save as type drop-down list, click either Text - Delimited (*.txt) or Text - Delimited (*.csv). Navigate to the folder you want to save the file to, then enter a name for the exported file into the File name field. ACT! will create this file for you. Click Save. Click Next to advance the Export Wizard. Under What kind of records do you want to export?, enable either Contact records only or Group records only. When exporting to a text-delimited file, you can only export one record type at a time. If you need to export both, first export the contacts to one file, and then export the groups to a second file. (Optional) To specify the export options: Click Options. The Export Options dialog box appears. Select field separator, click either Comma or Tab. The default is Comma. The application you will be importing the data to determines which field separator you should use. Do you want to export field names?, enable the Yes, export field names check box if required. This option can be useful for mapping fields when you import into another application. Click OK to close the Export Options dialog box. Click Next to advance the Export Wizard. Under Which contact or group records do you want to export?, click one of the following: Current record exports only the currently displayed record. Current lookup exports all the records in the current lookup. All records exports all records in the database. Click Next to advance the Export Wizard. The final page of the Export Wizard allows you to specify the order of exported record fields in the text-delimited file. Modify the field export order or remove fields from the export process as you require. Or, if you previously saved a field map, click the Load Map button. Note: To ensure a smooth import process into the destination application, it is important that you set up the field order to match the order in the destination application. For example, if you will be importing the text-delimited file into an Excel spreadsheet, ensure you sequence the fields in the same order that they appear in the spreadsheet. To change the order of fields in the list, click the field name in the list above which you want to insert the field and then click Insert Field. For example, if you want to insert a field above Company, click Company and then click Insert Field. When you click Insert Field, a drop-down list appears from which you can select the field you want to insert. When you insert the field, the field moved from its previous location in the list to the location you specified. To remove a field from the list, click any field in the list and then click Remove Field. When you click Remove Field, the field is removed from the list and will not be exported. If you remove a field from the list, you can always add it back by clicking Insert Field. To replace a field in the list, click the field you want to replace. A drop-down arrow appears to the right of the field. In the drop-down list, click the field that you want to replace the active field. The field that previously appeared in that location is replaced with your selection. (Optional) If you expect to need the field map again, click the Save Map button. In the Save As dialog box, navigate to the folder you want to save the map in, enter a File name for the map, and then click Save. Map files are saved with a .map extension. Click Finish to begin the export process.

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