

ACT-To-Outlook Professional V6.6

Designed for ACT!

Printed Manual

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ACT-To-Outlook Professional

Accurately convert ACT! Databases into Outlook

by ACT-To-Outlook.com Inc.

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Publisher

ACT-To-Outlook.com

Special thanks to:

Special thanks to our customers for their input and support in testing and encouraging us to go forward with this project.

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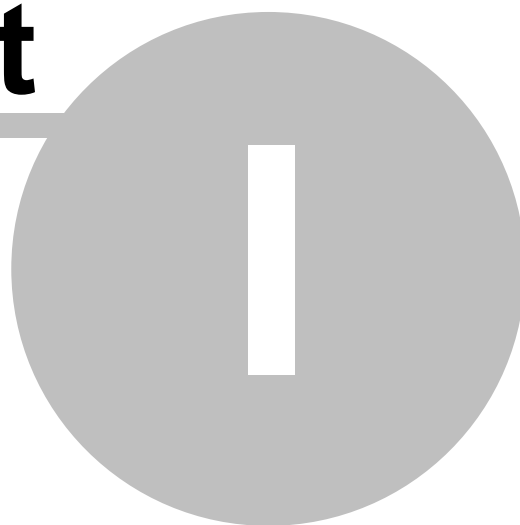
Foreword

I want all my data in Outlook as accurately as possible.

ACT-To-Outlook Professional

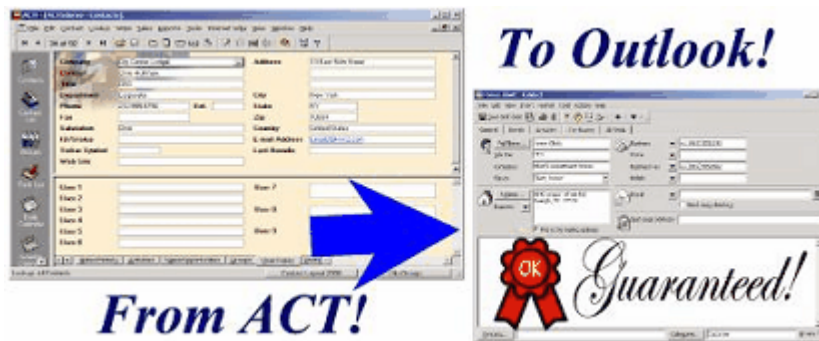
Accurately convert ACT! Databases into Outlook

Part



1 Welcome

ACT-To-Outlook Professional **6.6**



Compatible with ACT 2000 and ACT! 6.0 and Outlook 2000 SR-1 and above, Outlook 2002, Outlook 2003 and Outlook 2007!

The purpose of ACT-To-Outlook Professional is to provide users with a tool to quickly convert, update, and transfer an ACT! Contact database into Outlook Contacts. Powerful update and selection options makes this product ideal for anyone that wants to keep Outlook updated from ACT!.

Highlights of ACT-To-Outlook Professional:

- **Inclusion of Outlook Cleaner.** Clean your outlook folders rapidly with the click of a button.
- **Auto-Map generation of all standard and user defined ACT! fields.**
- **Single Click Conversion.** Use either our standard field mapping or setup your own customized field mapping. Click on a button and convert all the contacts.
- **Active Lookup Support.** Convert the Active Lookup in ACT! with a click. Also, convert single contacts as well as groups!
- **Integrated with Outlook.** Closely integrated with Outlook for easy of use and fast conversions. In addition, you don't get the persistent Outlook security warnings during the conversion.



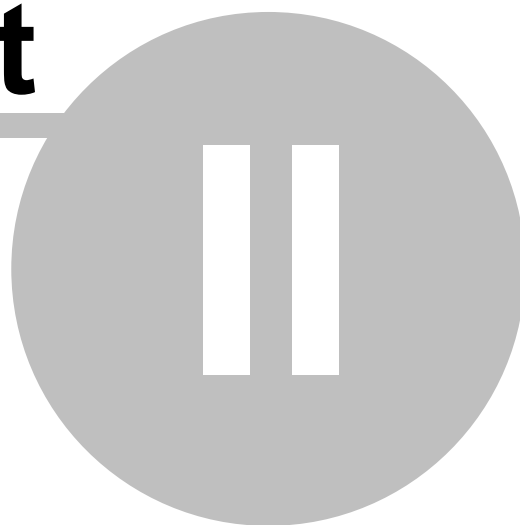
- **Convert Single Contacts, ACT! Groups or the whole database.** Convert selected contacts from the ACT! database, convert an ACT! group or convert the whole database into Outlook.
- **Custom Field Remapper.** Convert standard fields or custom fields from ACT! into Outlook User properties.

- **Background Processing.** Setup ACT-To-Outlook Professional to convert data at scheduled times.
- **Unique Duplicate Identifier.** Once a database has been converted, ACT-To-Outlook Pro establishes a unique 1-To-1 relationship between the ACT! Item and the Outlook Item.
- **ACT! Items Converted.** History, Attachments, Notes, Calendar, Groups, Standard Fields, Custom Fields, To Do's, Meetings, etc..
- And much, much more....

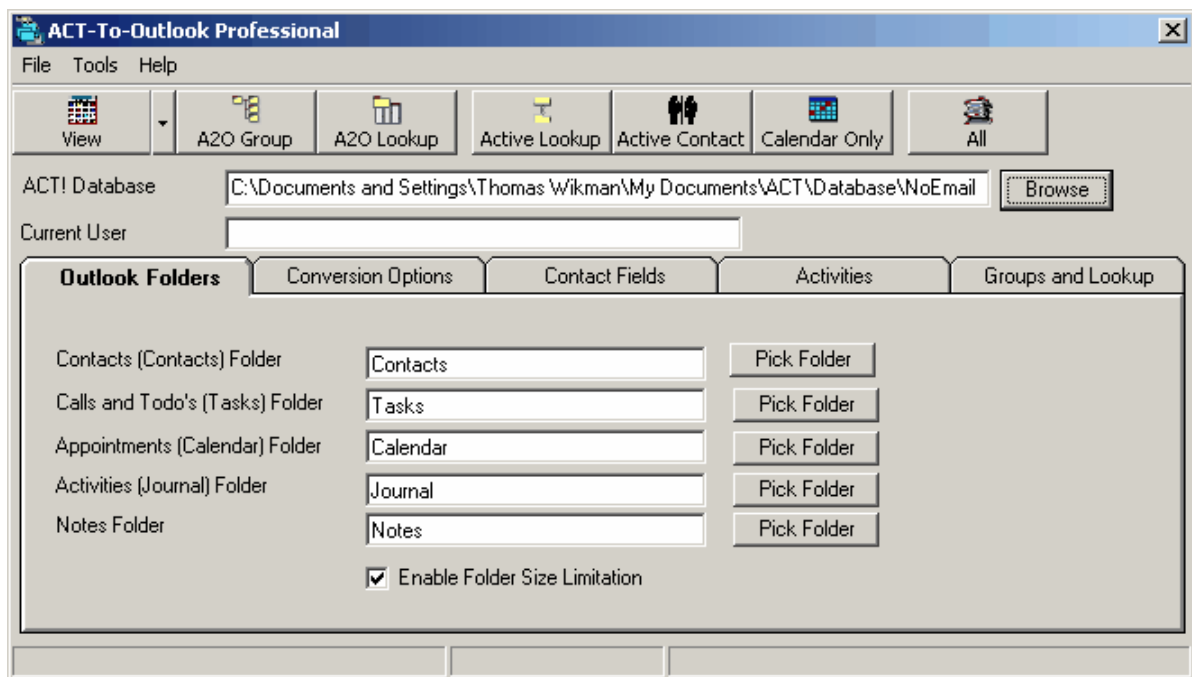
ACT-To-Outlook Professional

Accurately convert ACT! Databases into Outlook

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2 Introduction



The purpose of ACT-To-Outlook Professional is to provide users with a tool to quickly convert, update, and transfer an ACT! Contact database into Outlook Contacts. Powerful update and selection options makes this product ideal for anyone that wants to keep Outlook updated from ACT!.

2.1 Why Use ACT-To-Outlook Professional

ACT-To-Outlook Professional is designed for users that have an active ACT! database and want to transfer data from the ACT! database to the Outlook folders with modifications that make the data in Outlook more accessible and relevant.

[Major Features](#)

Ease of Use	Install, and you are ready to go. Merge and folder flexibility allows you to keep your ACT! Contacts updated with your Outlook.
Multi-User Support	ACT-To-Outlook Professional supports ACT! Multi-User configurations and properly converts the activities relating to the currently logged-in user.
PIMs Supported	ACT-To-Outlook Professional supports ACT! 2000 (build 5.0.4.495) and ACT! 6.0. In addition, Outlook 2000, 2002, 2003 and 2007 are supported.
Field Conversion Capabilities	All the fields in ACT! can be converted, whether they are standard fields or user defined fields. In addition, fields that are mapped to Outlook Custom forms are also converted.
Field Remapping Capabilities	All fields in ACT! can be remapped to Outlook fields, whether these fields exist in Outlook or not. The field remapping is maintained if you exit ACT-To-Outlook Professional.
ACT! Items Converted	<p>The following ACT! Items are converted to Outlook equivalents:</p> <ul style="list-style-type: none"> • Todo's - ACT! Todo's are converted into Outlook Tasks with the same time-reoccurring properties. • Calls - ACT! Calls are converted into equivalent Outlook Tasks. • Meetings - ACT! meetings are converted into Outlook Appointments. • History/Notes - All ACT! history items can be converted into Outlook Journal Items with links to the corresponding contacts. In addition, all and any notes, attachments, and files existent in the History is converted into Outlook. History Filtering allows the user to select which history type to convert.
Selective Conversion	You can convert contacts from a selected list of contacts. Simply choose the contact and all the fields, activities and history are converted into Outlook.
Group Conversion	You can select contacts belonging to an ACT! group and convert only the group.
State-of-the-art duplicate checking	<p>When you first want to convert your ACT! database into an existing Outlook contact folder, we check for corresponding contacts according to the following criteria</p> <ul style="list-style-type: none"> • Email Address. • First and Last Name and City • Company Name and City <p>Only when these criteria fail do we create a new contact.</p> <p>Once the first conversion has been made, ACT-To-Outlook Professional keeps a 1-to-1 match between the ACT! database and the corresponding Outlook item so that no duplicates are ever created.</p>
Outlook Overflow Checking	Due to Outlook's restrictions on the size of the folder (16K items), ACT-To-Outlook Pro will automatically create new folders during the conversion so that Outlook does not crash.

2.2 New Features with 6.0

ACT-To-Outlook Professional 6.0 comes loaded with added features:

- **Added Outlook Clean.** New tool helps users clean up the mounted folders with the click of a button.
- **New Auto-Mapping Feature.** Beyond the standard field map, you can map all the fields from ACT! to Outlook with the click of a button. Auto generation of user defined fields makes this process incredibly easy!!!
- **Groups and Subgroups Processing.** Finally, groups and subgroups are processed to the categories field in Outlook
- **Online .PDF Manual.**
- **Extended Outlook 2003 and 2007Support.**
- **Faster, easier, and better!!!!**

ACT-To-Outlook Professional 5.0 comes loaded with added features:

- **Active Lookup and Contact support.** Create a lookup in ACT! and then just press a button to convert all the contacts in the lookup, right from the ACT! toolbar.
- **Groups and Lookup support.** Select groups from your ACT! database and convert only that group. Also, setup a lookup in ACT-To-Outlook Professional and convert only those contacts.
- **Enhanced Interface.** Better interface and easier to use.
- **ACT! Icon Support.** Add the conversion actions into your ACT! toolbar.
- **Group Hierarchy Conversion Support.** Convert all the groups into Outlook and maintain the hierarchy of all the groups.
- **Customized FileAs Support.** Customize the way your contacts are filed in Outlook. Control their Destiny!
- **Enhanced Platform Support.** The software now supports Outlook 2000, 2002, and 2003.
- **Faster, easier, and better!!!!**

2.3 Help on ACT-To-Outlook Professional

You can obtain help for ACT-To-Outlook Professional in the following ways:

- **The help file shipped with the product.** The help file provided with ACT-To-Outlook Professional is the most recent help file when this version of ACT-To-Outlook Professional was created. We provide, an online version of this help file which may be more up-to-date than the shipped version
- **The online help file.** This is the most updated version of the help file. When additions and changes are made to the help file, they are always posted on the online help file. To access it, [click here](#).
- **Contact Support.** You can obtain free email support from ACT-To-Outlook.com. Make sure that you explain your problem/question with as much detail as possible. Use the support form by [clicking here](#).
- **Personalized, one-on-one support.** ACT-To-Outlook.com will provide personalized, one-on-one support to paying customers. Support is provided on an hourly basis. If you are interested on one-on-one support, you can purchase it by [clicking here](#). If you are based outside the U.S., schedule a time to call so that we can make sure the best support person is available to receive your call.
- **Suggestions.** ACT-To-Outlook.com is driven to provide software solutions that will satisfy our customers. Your input is important to us and we want you to contact us if you have any suggestions on added features or even improvements we can make to our products in order to make them better. [Please click here to submit a suggestion](#).

2.4 How to Buy ACT-To-Outlook Professional



ACT-To-Outlook Professional is distributed worldwide by a variety of resellers and distributors.

To Purchase

Click on the Registration->Purchase menu option of ACT-To-Outlook Professional and you will be taken to the purchase page for the product.

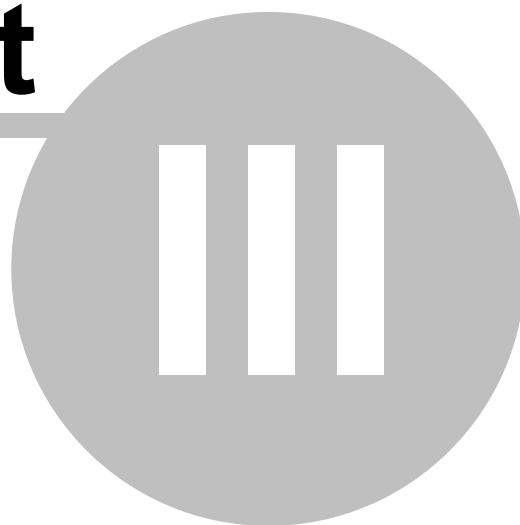
Home page

<http://www.ACT-To-Outlook.com.com>

ACT-To-Outlook Professional

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3 Installation

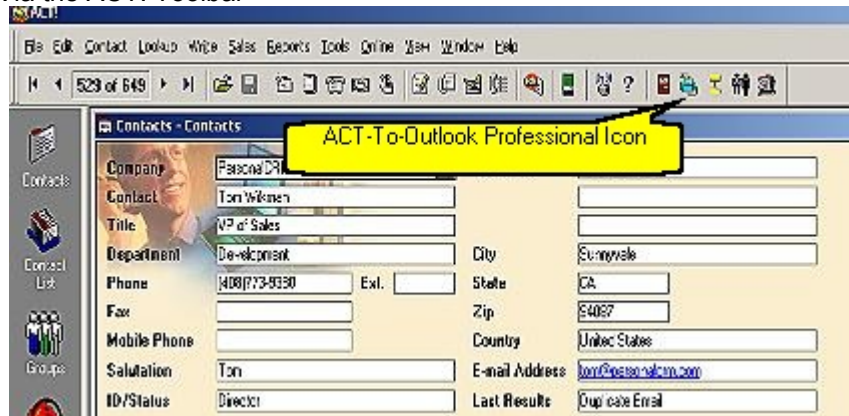
Installation of ACT-To-Outlook Professional is straightforward. The following is needed

- You'll need approximately 8mb of hard disk space
- ACT! 2000, build 5.0.4.495 or ACT! 6.0 installed on your system
- Administrator Privilege if running Windows XP, XP Pro, and 2000

To install, simply execute the ACT-To-Outlook Professional executable and follow the directions to install the program.

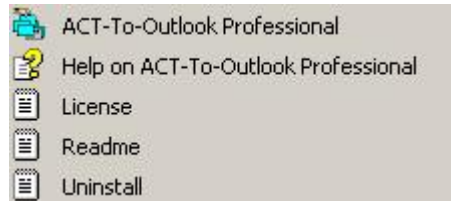
Once installed, ACT-To-Outlook Professional may be accessed two ways:

1. Via the ACT! Toolbar



2. From the windows start menu:

Click on the Start->Programs->ACT-To-Outlook Professional and you should get the menu below:



Select the ACT-To-Outlook Professional options and the software will start.

[To Download ACT-To-Outlook Professional](#)

To download the latest version of ACT-To-Outlook Professional, [click here](#).

[Sub-topics](#)

ACT-To-Outlook Professional Compatibility

Lists the system with which ACT-To-Outlook Professional is compatible with

License Registration

Instructions on the procedures on registering Email Address Validator

End-User License Agreement

Uninstall

3.1 ACT-To-Outlook Professional Compatability

ACT-To-Outlook Professional is an Addon Product for ACT!. Hence, it requires the user to have ACT! installed in the machine. ACT-To-Outlook Professional is compatible with ACT! 2000 or above.

ACT! 2000/6.0 compatibility

ACT-To-Outlook Professional is compatible with the following versions of ACT!:

- ACT! 2000 with Service Pack 5.0.4.495 or 5.0.3
- ACT! 6.0 - All versions.

ACT-To-Outlook Professional may not work with ACT! 2000 without a service pack i.e. build 5.0.0. The programming interface in the original ACT! version has posed problems with ACT-To-Outlook Professional and we suggest that if you are running an original version of ACT!, that you upgrade.

What to do if you have the original ACT! 5.0.0 build?

You have to upgrade to ACT! to Version 5.0.4.495. The upgrade may be obtained for free from act.com. Download the software (16mb) and execute it.

From our tests, V 5.0.4.495 has shown to be very reliable.

How to find out what version/build of ACT! you are running

To find out what version of ACT! you are running, do the following:

1. Click on **Help->About ACT!** on the ACT! Contact Screen
2. Check the Build Number on the right hand corner of the About Screen. The number of the build has to be higher than 5.0.0.X which is the original release of ACT! 2000.

Outlook Compatibility

ACT-To-Outlook Professional is compatible with Outlook 2000 service pack 1 or higher, Outlook 2002, Outlook 2003 and Outlook 2007.

Operating System Compatibility

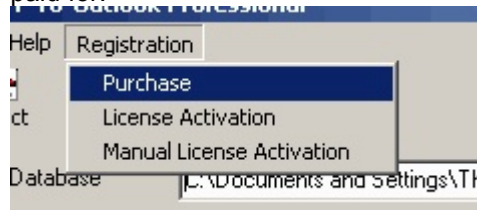
Email Address Validator for ACT! is compatible with the following Windows operating systems:

- Windows 98
- Windows 98 - SE
- Windows Me
- Windows 2000
- Windows XP
- Windows XP Professional
- Windows Vista

3.2 Registration

Purchasing ACT-To-Outlook Professional

To purchase ACT-To-Outlook Professional, click on the Buy/Purchase Button and it will take you to the web site for purchase. When the product is purchased, you receive a license code (some of our partners also call it a Serial Number), indicating that your product has been purchased and paid for.



ACT-To-Outlook Professional Registration

When you purchase ACT-To-Outlook Professional, you are provided with a License Number (in some cases it is called a purchase serial number). This number is your proof that you have purchased the product.

To activate, enter the license in the Registration->License Activation screen. This will register your software with ACT-To-Outlook.com's License Registration Server and enable your product.

The license provided to you will only work on 1 computer. If you attempt to activate the software on another computer, the license server will not allow that.

ACT-To-Outlook Professional Registration Problems

To register, ACT-To-Outlook Professional sends a registration request to a license server. In some cases, this registration request is blocked by a firewall. You'll get a message like "Connection was forcibly interrupted" or "Failed to Connect". When such even happens, do the following:

1. Click on the Help->Manual License Registration
2. Enter the registration details and instructions to activate the product will be sent to you.

3.3 End-User License Agreement

ACT-To-Outlook Professional LICENSE AGREEMENT - ACT-To-Outlook.com Inc.

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3.4 Uninstall

To uninstall ACT-To-Outlook Professional, do the following:

- Click on [Start->Settings->Control Panel](#)
- Execute [Add/Remove Programs](#) from the Control Panel
- Select ACT-To-Outlook Professional from the listed programs
- Click Remove and ACT-To-Outlook Professional will be removed from your system.

[A Few Things](#)

- Installing and Uninstalling will not reset the evaluation period for ACT-To-Outlook Professional
- Uninstalling ACT-To-Outlook Professional will not reset the conversion counter

ACT-To-Outlook Professional

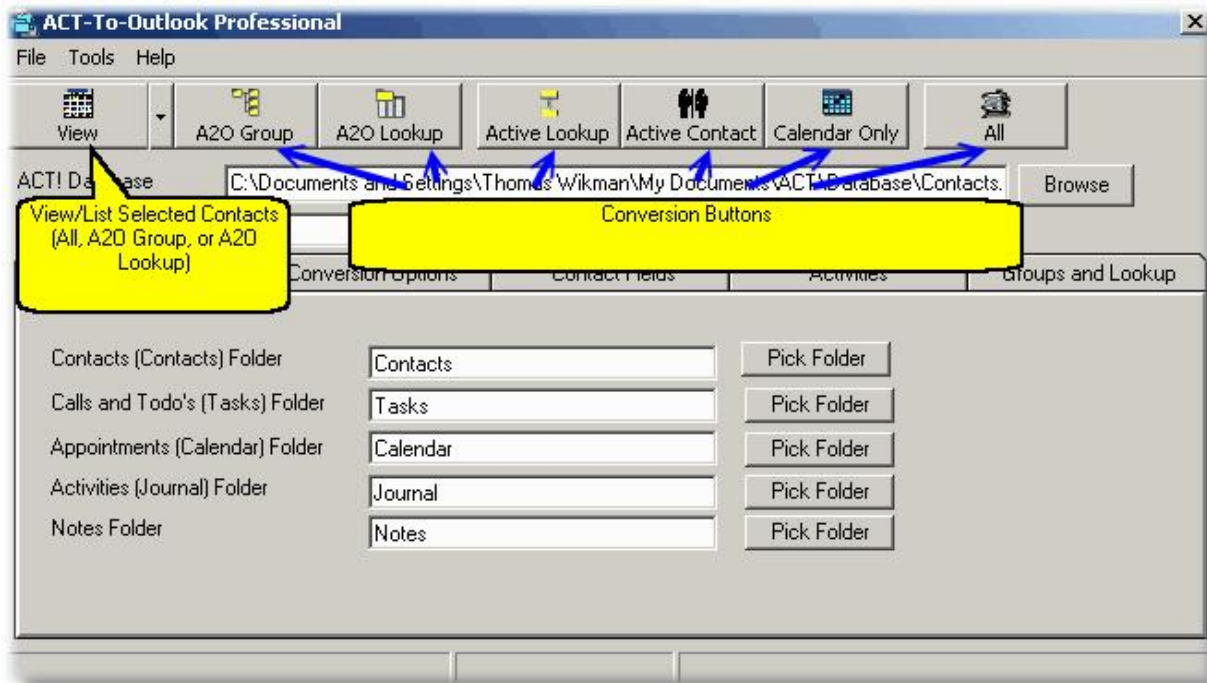
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IV

4 ACT-To-Outlook Pro Screens



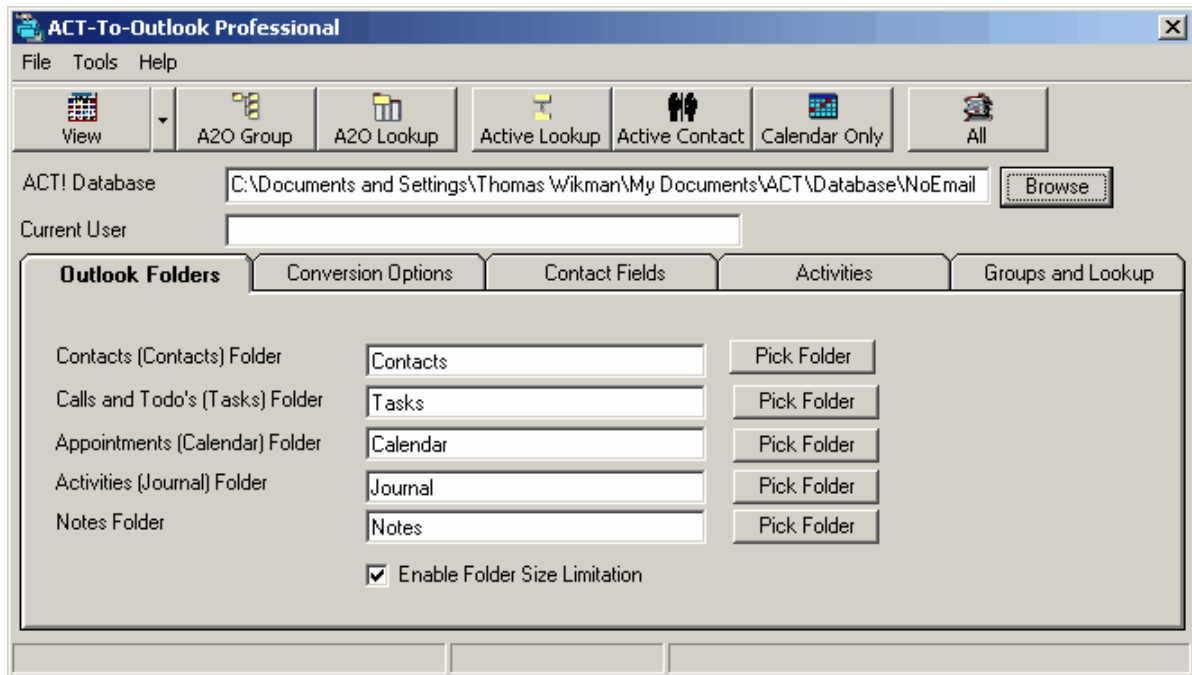
ACT-To-Outlook Professional allows you to convert ACT! databases into corresponding Outlook representations.

You can either convert the whole database using the Convert All button (available only when you purchase the product) or selectively convert contacts using the Select option. For evaluation purposes, you are allowed to convert a limited number of contacts.

ACT-To-Outlook Professional is run by selecting the [Start->ACT-To-Outlook Professional](#) icon from the Start menu.

When you click on the program, the screen above will appear. If you want to run ACT-To-Outlook Pro in the background, refer to

4.1 The Main Screen

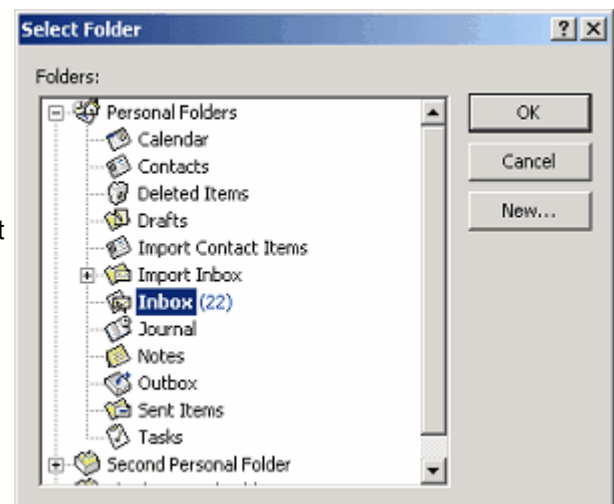


The Outlook Folders Tab

In the Outlook Folders Tab, the destination folders where ACT-To-Outlook Professional deposits the data are defined.

With ACT-To-Outlook Professional you can select which Outlook folder you want to deposit or update the data from the ACT! 2000 database. By clicking on the Pick Folder button, the form pops up which then allows you to enter the destination folder(s) for your conversion.

Make sure that the folder selected matches the type that has been requested i.e. Contact Folder should be of type Contact Folder; Appointments folder should be the same as a Calendar folder, etc..



These folders do not have to reside on your local machine. If your current version of Outlook can find the folders, ACT-To-Outlook Pro can find them as well.

If a folder is left empty, ACT-To-Outlook will deposit the information in the default folder for that type of information i.e. all Appointments will be created using the default Calendar folder.

ACT-To-Outlook Professional Toolbar



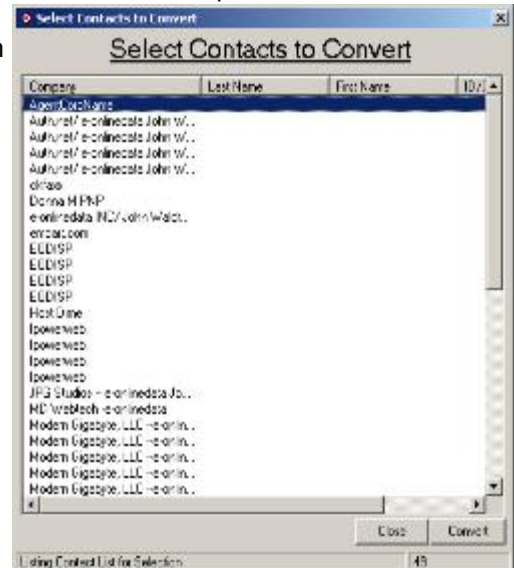
There are seven icons in the toolbar that perform the following:

View. When pressed, the View button will display all the contacts in the database. From this viewer, you can consequently select which contacts you want to convert and then press the convert button.

When you receive the select contacts screen, you can select single contacts or multiple contacts to convert. Use the mouse with either the control key down (for individual selections) or with the shift key (for a range of contacts) and select the contacts you want to select.

The Select Contacts screen is displayed in using 3 filters selected from the View Drop-Down Menu:

- **All.** Open Filter, you get to see all the contacts.
- **A2O Group.** Here, the filter used is the group selection active in the Group and Lookup tab.
- **A2O Lookup.** The filter applied here is the filter setup in the Group and Lookup tab.



A2O Group. This button converts only the contacts selected in Group filter from the Group and Lookup tab.

A2O Lookup. This button converts only the contacts selected in the Lookup Filter from the Group and Lookup Tab.

Active Lookup. The contacts being viewed by the current ACT! lookup are converted into Outlook

Active Contact. The contact being viewed by the open ACT! is converted.

Calendar Only. This option will convert all the contacts that have a calendar items related to the record that is logged in.

All. All the contacts in the database are converted.

The Active Lookup, Active Contact and All buttons are also available from the ACT! toolbar by default. To add any of the other buttons to the ACT! toolbar, simply click on Tools->Add Icon to ACT! Toolbar and the choices are then added to ACT!.

Enable Folder Size Limitation

Outlook folders has a size limitation of 16K Items for Outlook 2000 and 2002. Outlook 2003 does not have such a limitation. Enabling size limitation, ACT-To-Outlook Professional allows only 12000 items to be created in a folder and no more. Once 12001 items are created, a new folder is created and all subsequent items are created in the overflow folder. Overflow folders are the same name as the initial folder but followed by a number; for example, Journal is the original folder, all overflow folders are called Journal1, Journal2, etc..

If you disable folder limitation for Outlook 2000 and 2002 and the max number of items are stored in the Outlook folder, Outlook will behave erratically and hang and possibly crash.

4.1.1 Contact Options Tab

The Conversion Options screen provides you with Options to automate, filter and manage your conversion process.

ACT-To-Outlook offers options for the conversion to make it easier to synchronize your Outlook data with your ACT! data.

[Duplicate Found Options](#)

The Duplicate Found Options allow you specify what you want to do when a duplicate is found.

- **Check for Duplicates** – Indicates to the system to check for duplicates and perform smart updates. Otherwise no duplicate search is enabled. If you are doing a conversion to an empty outlook folder, uncheck this option since it speeds up processing.
- **Clear Duplicate Before Update**. When this flag is set, ACT-To-Outlook will clear the data in the Outlook record *before* adding the information to the Outlook Duplicate Record.
- **Ignore Update Dates**. When set, ACT-To-Outlook Professional does not compare whether an activity, contact, or meeting has changed in order to process the contact i.e. it simply goes ahead and process the activated fields/activities independent of whether these fields have been changed or not.

[Enable Intelligent Updater](#)

The Intelligent Updater, when enabled, does not process any items before the Update Cutoff Date. This date is automatically set at the end of each successful conversion i.e. the full conversion has to go through and then the date is set. However, users can choose to change this date at their choosing.

A few things about Intelligent Updater:

- The Intelligent Updater will only filter the items if the contact already exists in Outlook. If the contact does not exist in Outlook, every item is then analyzed and processed for the contact.
- The Intelligent Updater takes the date entered in the Cutoff date and if an existent contact does not have any changes made to it after the cutoff date, it will skip the item and go to the next one. It applies this logic to the main contact data (the last time the contact was edited) and to the last time the todo's, calls, meetings and history notes.
- The Cutoff date is always set after a full processing of a lookup, group or all conversion.
- If you conversion data shifts, for example, you convert a group, then a contact, then a lookup, it is not advisable that you use the Intelligent Updater since the base data changes so many items may not be converted when they should.

When Intelligent Updater is used with a fixed conversion base, you will dramatically improve conversion speeds.

Options

The options check boxes represent the following:

- **Add Date to Subject Line.** When items are converted into Outlook, the date in ACT! is inserted in the subject line. This simplifies visual searches by date.
- **Convert ACT! Groups into Outlook Categories.** All the groups to which the contact belongs to in ACT! and convert them into Categories in Outlook.
- **Include Private Contacts.** When checked, all private contacts are converted as well. When unchecked, private contacts are not included
- **File Contact As:.** This enables the user to specify how to create the keywords for the record in Outlook. These keywords determine how the contact is identified in the Outlook Contact Book.

In the File Contact As, you can set the filing as Custom. When custom is chosen, another set of options make themselves available:

You must then build the FileAs string. All the ACT! fields MUST be enclosed in right parenthesis [ACT! Field] for the parsing mechanism to do it properly.

Building a FileAs String.

Click on the Build button and the build screen is displayed. Select which fields you want to appear in your fileas screen and separate them using whatever strings you wish.

Do not use square parenthesis of your own on the build string. The parenthesis are reserved for parsing the string. However, you can use any other string.

Whatever you insert in the string, that is the way the contact will be entered into Outlook.

- **Form To Use.** If you defined your own custom contact form in Outlook, enter the name here. The name of the form must match the name in Outlook. If there are any discrepancies, the conversion of the contact will not succeed. Outlook form names are generally named "IPM.Contact.FormName", where "IPM.Contact" indicates to Outlook that this is a contact

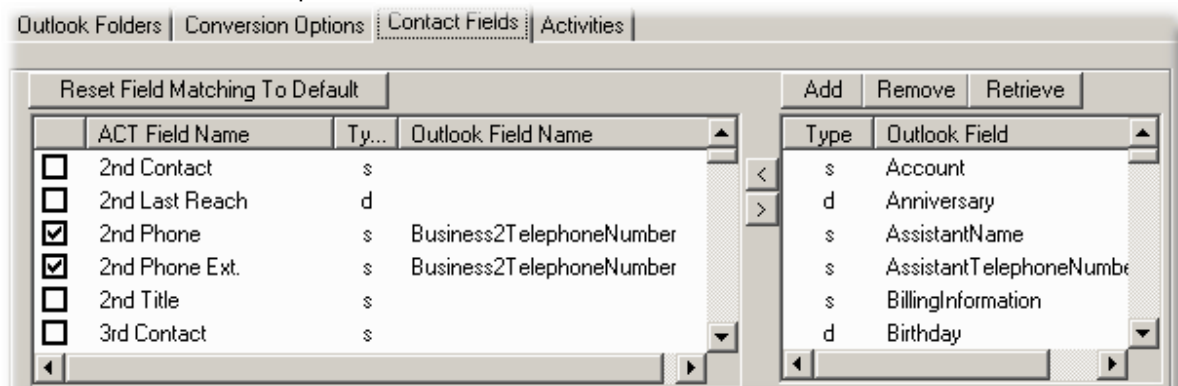
form. ACT-To-Outlook Professional attaches the prefix "IPM.Contact." to the name of the form in this field. Hence, you only need to enter the name of the form, in our case FormName.

Addressing Options

- **Merge Address 1, 2, and 3 into one string.** When enabled (default), this option takes the standard address fields in ACT and merges them into one single string with the fields separated by returns. This makes the addresses "Outlook friendly". The address fields converted are Address 1, 2, and 3 and Home address 1 and 2. **Note: you must not map Address 2 and Address 3 in order for this option to work. Make sure that you have Address 1 enabled. If Address 2 and 3 are mapped, the address field will be overwritten**
- **Add phone number extension to Phone number.** When set, this option adds the phone number extension to the end of the phone number. For example, Outlook only provides 1 field to add a phone number to. Hence, this feature will take the standard phone fields with extensions and put merge them to make one field in Outlook.
- **Remove Phone # Country Code.** When this option is set, ACT-To-Outlook Convert professional will remove the country code specified in CC from the phone number. The reason this option is available is because ACT! provides the phone number in the format of +1 (408) 555-1212 where +1 is the country code, (408) is the area code, and 555-1212 is the phone number. Some installations of Outlook will accept this phone number. However, others will not. Hence, you can specify ACT-To-Outlook Professional to remove a specified country code.
- **Add Hyphen to Phone Number.** Some ACT! configurations provide the phone number as a string of 7 digits i.e. 1234567 and Outlook will import those phone numbers and not add the customary hyphen to the phone number. By setting this option, you can force the phone number to have a separating hyphen on the last 4 digits before they are imported i.e. The number would look like 123-4567 therefore making it more legible.
- **Use Company Name when Name does not exist.** Outlook requires a contact name in order for the links to function properly. This option instructs ACT-To-Outlook Professional to replace the company name in the name field of FileAs so that the contact get's saved properly and links to the contact work well. If this option is not set, the user will be queried for every instance of this problem.

4.1.2 Contact Fields Tab

Click on the fields on the picture to find out what it does.



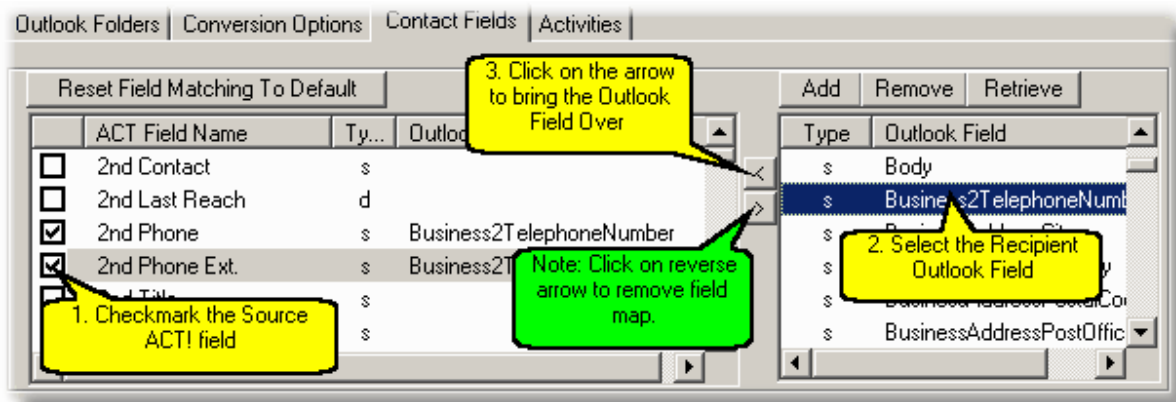
ACT-To-Outlook Pro provides users with a standardized set of fields. However, for users that have customized fields defined, the fields remapping feature provides the avenue for users to successfully move over data from custom fields. There are 3 types of fields, namely: s for String, d for Date, and n

for numbers.

4.1.2.1 Mapping ACT! Fields To Outlook

There are various ways to map Outlook fields to ACT! fields. ACT-To-Outlook Professional provides a set of default field mappings but you can map any field in ACT! to an existent or to a new field in Outlook.

Mapping To Outlook Fields



The process of mapping Standard Outlook fields to ACT! fields is done as follows:

1. Select which ACT! field you want to map. Enable the mapping by clicking on the check box.
2. Click on the Standard field in the Outlook Field List.
3. Click on the arrow button to bring over the field map.

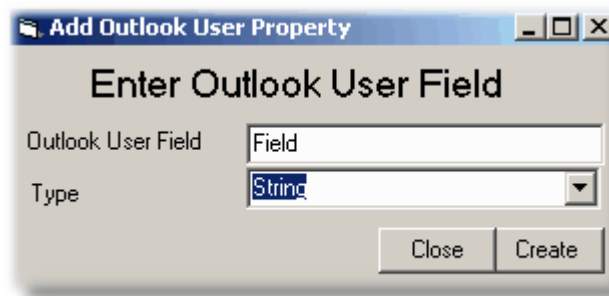
The field mapping is automatically saved. If you'd like to remove the field mapping, simply click on the reverse arrow and the map will be removed. Pressing the Del key will also remove the mapping.

4.1.2.2 Adding Outlook User Defined Fields

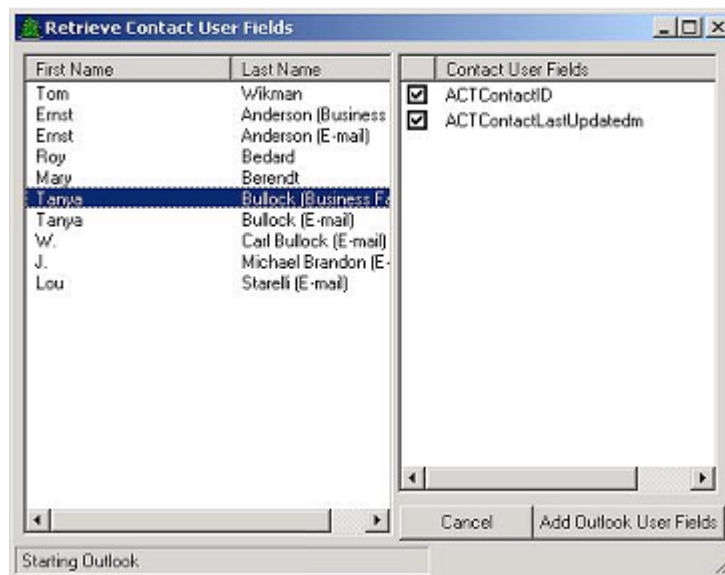
Setting up the Outlook User Defined Fields

All Outlook User Defined Fields are displayed in Bold in the User defined field list. ACT-To-Outlook Professional allows the user to create corresponding Outlook User defined fields for ACT! records.

- **Add Outlook User Defined Field:** add a user defined field to Outlook by simply typing in the input box. Duplicate fields will be ignored. Also, all fields are considered to be of type string.



- **Remove Outlook User Defined Field:** remove the selected Outlook user defined property from the list of defined fields. You can only remove user defined fields.
- **Retrieve User Properties from Existing Contacts.** If you already have outlook contacts that have the user defined fields that you want, you can search outlook for these fields using this option. This option creates a screen that displays all the contacts in the Outlook Contact Database and when you click on the contact, it will display the user fields defined for that contact.



By clicking on the contact, this screen displays the user defined fields found for the contact.

Note: if the user defined field has an empty value, Outlook does not see it as a user defined field and it will not appear in the list!

To add these user fields to the list of user fields that you want to create, select the Add Outlook User Fields button.

4.1.2.3 Outlook and ACT! Fields

All Outlook Fields that are write/read are available to be overwritten. Fields that are Read-Only in Outlook cannot be overwritten by ACT-To-Outlook Professional. The fields below cannot be overwritten by the conversion.

Fields that cannot be overwritten in Outlook

Actions	Email2EntryID	LastFirstSpaceOnlyCompany
Application	Email3DisplayName	LastModificationTime
Class	Email3EntryID	LastNameAndFirstName
CompanyLastFirstNoSpace	EntryID	Links
CompanyLastFirstSpaceOnly	FormDescription	OutlookInternalVersion
ConversationIndex	FullNameAndCompany	OutlookVersion
ConversationTopic	GetInspector	Parent
CreationTime	LastFirstAndSuffix	Saved
EmailDisplayName	LastFirstNoSpace	Session
EmailEntryID	LastFirstNoSpaceCompany	Size
Email2DisplayName	LastFirstSpaceOnly	

Street Address Fields and Phone Numbers

Street Address fields are handled differently between ACT and Outlook. In ACT, the street address fields are defined as Address1, Address2 and so on. In Outlook, the street address fields are one field separated by returns (carriage-return-line-feed).

Hence, ACT-To-Outlook Professional provides users with the option to merge address and phone number fields to be Outlook Friendly.

<u>ACT! Representation</u>		<u>Outlook Representation</u>	
Field	Example	Field	Example
<u>Contact's Street Address</u>		<u>Outlook Street Address</u>	
Address 1	1892 Washington	BusinessAddressStreet	1892 Washington Apartment A Suite 202
Address 2	Apartment A		
Address 3	Suite 202		
<u>Contact's Home Address</u>		<u>Outlook Street Address</u>	
Alt Address 1	1892 Washington	HomeAddressStreet	1892 Washington Apartment A Suite 202
Alt Address 2	Apartment A, Suite 202		
<u>Contact's Phone Number</u>		<u>Outlook Phone Number</u>	
Phone	408-773-9380	BusinessTelephone Number	408-773-9380 Ext. 2343
Ext	2343		
All other phone numbers in ACT! are dealt with in the same way i.e. the extension is applied directly to the phone number, unless the merge fields feature is not set.			

4.1.2.4 Email Addresses

An ACT! contact can have an unlimited number of Email Addresses while Outlook only allows 3

"standard" email addresses, namely Email1Address, Email2Address, Email3Address. ACT-To-Outlook converts email addresses using the following logic:

- The ACT! default (or Primary) email address gets converted to Email1Address
- Any other email addresses found in the database get converted into Email2Address and Email3Address. If there are more than 3 Email addresses for the contact, the remaining email addresses get converted to User Properties named Email#Address where # is a number starting at 4 and increasing for every additional Email Address found for the ACT! Contact

4.1.2.5 ACT! Standard Fields

Database		
schema name	Field name	Description
ADDR1	Address 1	
("Address" displays)	First line of the contact's primary address.	
ADDR2	Address 2	
	Second line of the contact's primary address. <i>This field is spliced with ADDR1</i>	
ADDR3	Address 3	Third line of the contact's primary address. <i>This field is spliced with ADDR1</i>
ALT1REACH	2nd Last Reach	
(not displayed unless added in the Layout Designer)	Date of the last completed call to the second contact. The format is YYYYMMDD. This field is supplied by the system.	
ALT2REACH	3rd Last Reach	
(not displayed unless added in the Layout Designer)	Date of the last completed call to the third contact. The format is YYYYMMDD. This field is supplied by the system.	
ALTADDR1	Home Address 1	First line of the contact's home address.
ALTADDR2	Home Address 2	Second line of the contact's home address.
ALTCITY	Home City	City in the contact's home address.
ALTCOUNTRY	Home Country	Country in the contact's home address.
ALTEXT	Alt Phone Ext.	
("Ext." displays)	Extension for the contact's alternate phone number.	
ALTPHONE	Alt Phone	Contact's alternate phone number.
ALTSTATE	Home State	State in the contact's home address.
ALTZIP	Home Zip	Zip code in the contact's home address.
ASSISTANT	Assistant	Name of the contact's assistant.
ASST_EXT	Asst. Phone Ext.	
("Ext." displays)	Extension for the phone number of the contact's assistant.	
ASST_PHONE	Asst. Phone	Phone number of the contact's assistant.
ASST_TITLE	Asst. Title	Title of the contact's assistant.
CITY	City	City in the contact's address.
COMPANY	Company	Contact's company name.
CONT_TYPE	Contact Type	Contact record type.
Values are:		

CREATOR	Record Creator	The database user who created the contact record. This field is supplied by the system.
CTIME	Create Timestamp	
("Create Date" displays)	Date and time the contact record was created. This field is supplied by the system and stored in a compressed format.	
DEPARTMENT	Department	Contact's department.
ETIME	Edit Timestamp	
("Edit Date" displays)	Date and time the contact record was last modified. This field is supplied by the system and stored in a compressed format.	
EXT	Phone Ext.	
("Ext." displays)	Extension for the contact's primary phone number.	
FAX	Fax	Contact's fax number.
FAX_EXT	Fax Ext.	
(not displayed unless added in the Layout Designer)	Extension for the contact's fax number.	
FNAME	First Name	
(not displayed unless added in the Layout Designer)	Contact's first name. This field is parsed by the system from the contact.	
HOME_PHONE	Home Phone	Contact's home phone number.
IDSTATUS	ID/Status	Category assigned to the contact.
LAST_ATMPT	Last Attempt	Date of the last attempt to call the contact. The format is YYYYMMDD. This field is supplied by the system.
LAST_MEET	Last Meeting	Date of the last meeting with the contact. The format is YYYYMMDD. This field is supplied by the system.
LAST_REACH	Last Reach	Date of the last completed call to the contact. The format is YYYYMMDD. This field is supplied by the system.
LAST_RSLTS	Last Results	Comments on the last results with the contact.
LNAME	Last Name	
(not displayed unless added in the Layout Designer)	Contact's last name. This field is parsed by the system from the contact name.	
LTTR_DATE	Letter Date	Date of the last letter sent to the contact. The format is YYYYMMDD. This field is

PAGER	Pager	Contact's pager number.
PHONE	Phone	Contact's primary phone number.
PHONE2	2nd Phone	Second contact's phone number.
PHONE2_EXT	2nd Phone Ext.	
("Ext." displays)	Extension for the second contact's phone number.	
PHONE3	3rd Phone	Third contact's phone number.
PHONE3_EXT	3rd Phone Ext.	
("Ext." displays)	Extension for the third contact's phone number.	
PUB_STATUS	Public/Private	Access level for the contact.
Values are:		
1 Public (default)		
2 Private		
REFER_BY	Referred By	Description of the contact's referral source.
SALUTATION	Salutation	Contact's letter salutation or greeting name.
SPOUSE	Spouse	Name of the contact's spouse.
STATE	State	State in the contact's address.
TICKERSYM	Ticker Symbol	Company's stock ticker symbol for ACT! 4.0 or later databases only.
TITLE	Title	Contact's title.
TITLE2	2nd Title	Second contact's title.
TITLE3	3rd Title	Third contact's title.
UNIQUE_ID	Unique Id	Unique contact record identification number. This field is supplied by the system.
URL	Web Site	Contact's web site URL address.
USER	Record Manager	The Unique ID of the database user permitted to access and change the status of private contacts. This field is supplied by the system.
USER1	User 1	User-definable field 1.
USER2	User 2	User-definable field 2.
USER3	User 3	User-definable field 3.
USER4	User 4	User-definable field 4.
USER5	User 5	User-definable field 5.
USER6	User 6	User-definable field 6.
USER7	User 7	User-definable field 7.

USER8	User 8	User-definable field 8.
USER9	User 9	User-definable field 9.
USER10	User 10	User-definable field 10.
USER11	User 11	User-definable field 11.
USER12	User 12	User-definable field 12.
USER13	User 13	User-definable field 13.
USER14	User 14	User-definable field 14.
USER15	User 15	User-definable field 15.
ZIP	Zip	Zip code in the contact's address.

4.1.2.6 Outlook Standard Fields

Name	Description
Account	Specifies the account information
Anniversary	Specifies the date of the contact's anniversary
AssistantName	The name of the contact's assistant
AssistantTelephoneNumber	The telephone number for the contact's assistant
BillingInformation	Contains a free-form string that can be used to hold the billing information associated with the item.
Birthday	The date of the contact's birthday
Body	A free-form string containing the body of the item.
Business2TelephoneNumber	The second business telephone number for the contact
BusinessAddress	The entire unparsed business address for the contact
BusinessAddressCity	The city part of the contact's business address
BusinessAddressCountry	The country part of the contact's business address
BusinessAddressPostalCode	The postal code part of the contact's business address
BusinessAddressPostOfficeBox	The Post Office Box of the contact's business address
BusinessAddressState	The state code for the contact's business address
BusinessAddressStreet	The street information for the contact's business address
BusinessFaxNumber	The contact's business fax number
BusinessHomePage	The URL of the home web page of the business
BusinessTelephoneNumber	The contact's business telephone number
CallbackTelephoneNumber	The telephone number at which the contact may be called back
CarTelephoneNumber	The contact's car telephone number
Categories	Specifies the categories that are assigned to the item.
Children	The names of the contact's children
Companies	A free form string containing the company names associated with the item
CompanyMainTelephoneNumber	The main telephone number for the contact's company
CompanyName	The name of the company that the contact works for

Email1AddressType	The address type ("SMTP") of the contact's first email address
Email2Address	The contact's second email address
Email2AddressType	The address type ("SMTP") of the contact's second email address
Email3Address	The contact's third email address
Email3AddressType	The address type ("SMTP") of the contact's third email address
FileAs	The keyword for the contact
FirstName	The contact's first name
FTPSite	The contact's FTP site entry
FullName	The contact's whole name
Gender	The gender of the contact
GovernmentIDNumber	The government ID number for the contact
Hobby	The contact's hobby
Home2TelephoneNumber	The second home telephone number for the contact
HomeAddress	The entire unparsed home address of the contact
HomeAddressCity	The city part of the home address
HomeAddressCountry	The country part of the home address
HomeAddressPostalCode	The postal code part of the home address
HomeAddressPostOfficeBox	The Post Office Box of the home address
HomeAddressState	The state code for the home address
HomeAddressStreet	The street information for the home address
HomeFaxNumber	The contact's home fax number
HomeTelephoneNumber	The home telephone number of the contact
Importance	Specifies the importance of the contact (0=low, 1=medium, 2=high)
Initials	The initials of the contact
InternetFreeBusyAddress	The URL for the contact's free/busy information
ISDNNumber	The contact's ISDN number
JobTitle	The contact's job title
Journal	Specifies whether all the transactions are to be entered into the journal
Language	The language for the contact
LastName	Specifies the contact's last name

MailingAddress	The entire unparsed mailing address of the contact
MailingAddressCity	The city part of the mailing address
MailingAddressCountry	The country part of the mailing address
MailingAddressPostalCode	The postal code part of the mailing address
MailingAddressPostOfficeBox	The Post Office Box of the mailing address
MailingAddressState	The state code for the mailing address
MailingAddressStreet	The street information for the mailing address
ManagerName	The name of the manager of the contact
MiddleName	The middle name of the contact
Mileage	Mileage record for the contact
MobileTelephoneNumber	The contact mobile phone number
NetMeetingAlias	The contact's ID or alias for Net Meetings
NetMeetingServer	The name of the server to host the Net Meeting
NickName	The contact's nickname
OfficeLocation	The office location information for the contact
OrganizationalIDNumber	The organizational ID number for the contact
OtherAddress	The entire, unparsed for of another address for the contact
OtherAddressCity	The city part of the other address
OtherAddressCountry	The country part of the other address
OtherAddressPostalCode	The postal code part of the other address
OtherAddressPostOfficeBox	The Post Office Box part of the other address
OtherAddressState	The state code for the other address
OtherAddressStreet	The street information for the other address
OtherFaxNumber	Another Fax Number for the contact
OtherTelephoneNumber	Another Telephone Number for the contact.
PagerNumber	The contact's pager number
PersonalHomePage	The URL for the contact's personal home page
PrimaryTelephoneNumber	The primary phone number for the contact
Profession	The profession for the contact
RadioTelephoneNumber	The radio telephone number of the contact

ReferredBy	The name of the person that referred this contact to you.
Sensitivity	Specifies the level of sensitivity for the contact (0=normal, 1=personal, 2=private, 3=confidential)
Spouse	The name of the contact's spouse
Subject	Contains the subject of the item
Suffix	The contact's suffix
TelexNumber	The contact's telex number
Title	The contact's Title
TTYTDDTelephoneNumber	The TTY/TDD telephone number for the contact
User1	The first MS Schedule+ user for the contact
User2	The second MS Schedule+ user for the contact
User3	The third MS Schedule+ user for the contact
User4	The fourth MS Schedule+ user for the contact
UserCertificate	The authentication certificate for the contact
WebPage	The URL for the contact's web page
YomiCompanyName	The Japanese phonetic rendering of the company name
YomiFirstName	The Japanese phonetic rendering of the contact's first name
YomiLastName	The Japanese phonetic rendering of the contact's last name

4.1.3 Activities Tab

The screenshot shows the 'Activities' tab in the ACT-To-Outlook Pro interface. It is divided into three main sections:

- Activities to Convert:** Contains checkboxes for converting various activity types:
 - ☒ Convert To Do's
 - ☒ Convert Calls
 - ☒ Convert Meetings
 - ☐ Convert Alarms
 - ☒ Convert History/Notes
 - ☒ Convert Selected Activities into Journal
 - ☐ Convert Selected Activities into Body Text
- Outlook Forms:** Contains dropdown menus for selecting the target Outlook form:
 - Calendar: Default
 - Tasks: Default
 - Journal: Default
- Notes/History To Convert:** Contains a list of activities with checkboxes:
 - ☐ Access
 - ☒ Attachment
 - ☐ Call Attempted
 - ☒ Call Complete
 - ☒ Call Erased
 - ☐ Call Log

At the bottom, there are additional checkboxes: ☒ Add Name To Activity Subject Line and ☒ Include Private Activities. A 'Date Filter' section with a text box and a button is also present.

Activities Conversion Options

The Activities Conversion options allows you to convert/update activities that exist in the Notes/History of ACT!.

Activities to Convert

- **To Do's**. You can enable or disable conversion of Todo's.
- **Calls**. You can enable or disable conversion of calls.
- **Meetings/Appointments**. You can enable or disable conversion of meetings.
- **Convert Alarms**. This option enables the creation of Outlook alarms for ACT! alarms for todo's, calls, and meetings/appointments. Most ACT! activities tend to have the alarm set but the user has disabled it via either the snooze button or by some other means. The alarm, however, still lingers and will pop-up in Outlook as an item to be dealt with. Disabling the conversion of the alarm flag, you basically do not activate Outlook alarms. If the database is clean and the activities well maintained, converting alarms should not be a problem. However, if you have lots of old alarms that have not been dealt with, these alarms will popup in Outlook with an annoying speed. Hence, we provide you with the option of converting/not converting the alarms. By default, we do not convert the alarm.
- **History/Notes**. Convert all the history and notes for all the contacts into outlook Journal Entries and Notes when applicable.
 - o **Convert Notes into Journal**. This is the recommended option to convert Notes from ACT! to Outlook. ACT-To-Outlook can convert ACT! Notes into Outlook Notes. However, If you prefer to convert the ACT! Notes into Outlook Quick Notes, you may do so.
 - o **Convert Notes into Body Text**. All the selected activities for the contact are converted into the Outlook Body text for the contact form
- **Date Filter**. This allows you to filter out activities before a specific date i.e. if you only want ACT-To-Outlook Professional to convert activities that happened after Jan 1, 2002, you set the date here to be Jan 1, 2002 using the provided date picker and consequently no Activity before Jan 1, 2002 will be converted. It allows you to select/deselect what type of history items you want transferred to Outlook. This prevents over populating the Outlook journal with information that may not be necessary (such as field changed history record).
- **Add Name to Activity Subject Line**. This option will add the contact's name to the beginning of the activity subject line in Outlook. This makes it easier to see with whom an activity is scheduled with.
- **Include Private Activities**. This option enable/disables the inclusion of private activities (with the private flag set) to be transferred to Outlook.

Outlook Forms

If you use customized outlook forms for Tasks, Activities, and Appointments, enter the form names here.

History/Notes Dates

Due to restrictions in Outlook, when a Journal item is created, the date of creation of that item is the day of the execution of ACT-To-Outlook Professional. However, this does not match the ACT! recording date. Hence, when ACT-To-Outlook Professional creates Journal entries, each entry is provided with a custom variable called ACTRecordedDate which can then be used as the date is the design of custom forms.

4.1.4 Group and Lookup Tab

The screenshot shows the 'Groups and Lookup' tab in the ACT-To-Outlook Pro application. The interface includes a tab bar at the top with five tabs: 'Outlook Folders', 'Conversion Options', 'Contact Fields', 'Activities', and 'Groups and Lookup'. The 'Groups and Lookup' tab is currently selected. Below the tab bar, there is a section labeled 'Current Group Selected' with a text input field and a small button with two dots. Below this is a section labeled 'Current Lookup Parameters'. This section contains two columns: 'Field' and 'Value'. Under 'Field', there is a text input field containing 'First Name' and a small button with two dots. Under 'Value', there is a text input field containing 'Tom'.

The group and lookup Tab allows you to pre-define selected groups to convert (which are named A2O Groups) or Lookup fields to use when selecting contacts to convert. You can view the contacts that are defined by these fields by clicking on the View->A2O Groups or View->A2O Lookup option.

ACT-To-Outlook Professional

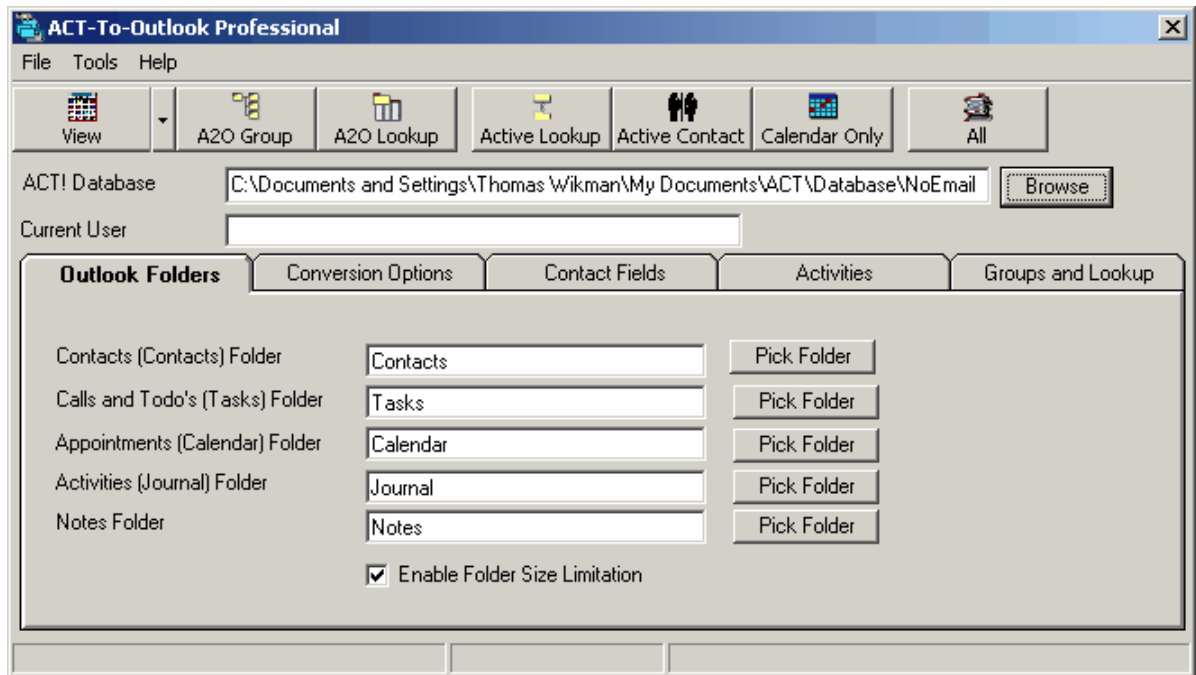
Accurately convert ACT! Databases into Outlook

Part



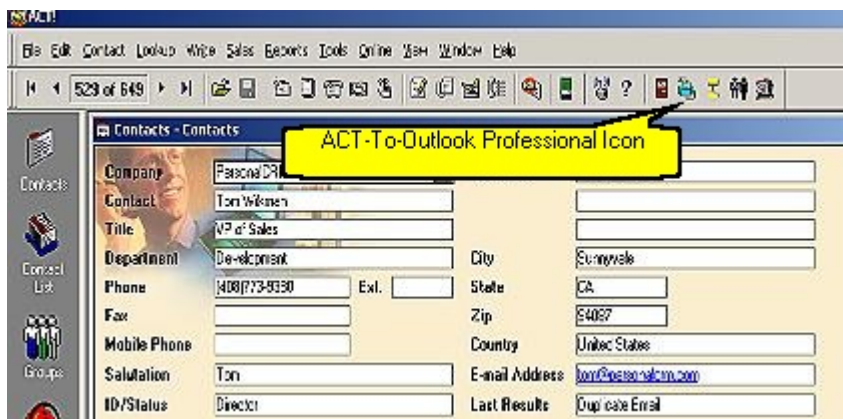
V

5 Using ACT-To-Outlook Professional



You can run ACT-To-Outlook Professional from 2 places:

1. The Start menu in the windows toolbar
2. The icon in the ACT! toolbar.



Converting Contacts

ACT-To-Outlook Professional allows you to convert contacts in two modes:

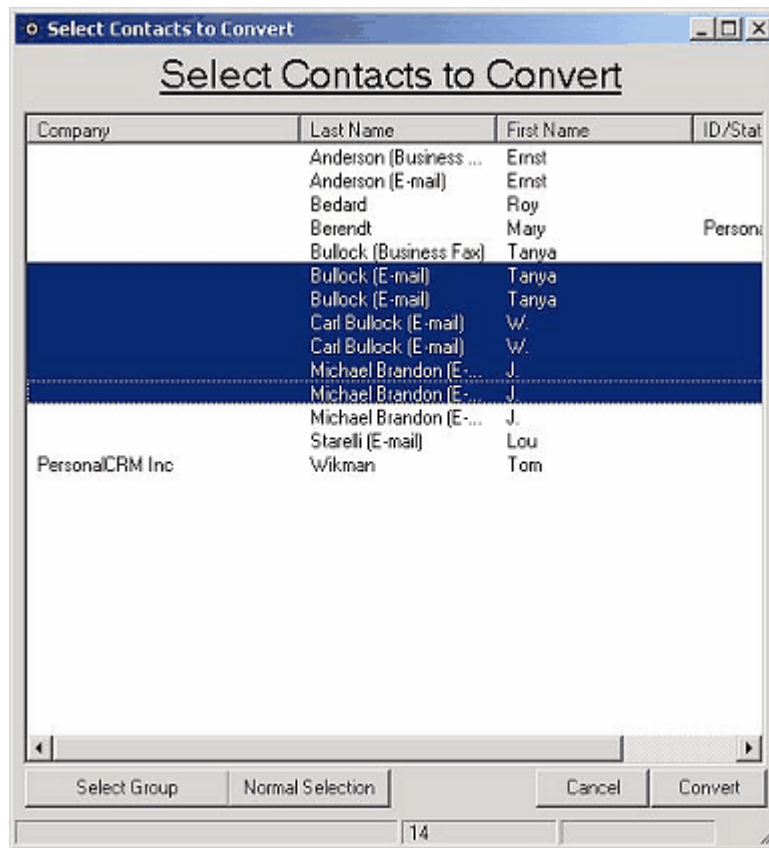
- Selective Conversion. This is where you select contacts or groups to convert .
- Convert All. Click on a button and all contacts are converted.

When a duplicate contact is found, only contacts that have been updated are transferred.

Selective Conversion

When you first open selective conversion, all the contacts in the database are listed. You can select one or a range of contacts using the mouse and the Ctrl or Shift button. Pressing Convert will convert the selected contacts. Selective conversion operates in two modes:

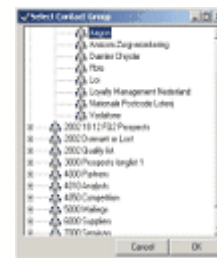
All the options set on the main screen are inherited into this screen. By clicking on the header, the names will sort themselves ascending or descending order.



In this mode, all the contacts that exist in the database are displayed. By clicking on the column headers, you are able to sort the records alphabetically in descending and ascending order. All the options set on the main screen are inherited into this screen. By clicking on the header, the names will sort themselves ascending or descending order.

A2O Group Mode Selective Conversion

In Group mode selective conversion, you can select groups that exist in ACT! and display these groups for conversion. By clicking on the Select Group button, the Existent ACT groups that exist in the database are displayed as shown below. The numbers in parenthesis are the number of members in each group.



When a group is selected only the first and last name of the contact is displayed. To return to normal display, exit the selective contacts conversion and restart it again.

A20 Lookup Mode Selective Conversion

In this mode, all the records are selected according to the lookup criteria in ACT-To-Outlook Professional.

Active Lookup Conversion

In the Active Lookup Conversion, the contacts that are displayed in the current lookup in ACT! are

converted. ACT-To-Outlook Professional will first go through the lookup and then it starts to convert the data.

Active Contact Conversion

In the Active Contact Conversion, the contact that is currently being displayed in ACT! is converted into Outlook.

Convert All

Clicking this options allows you to convert all the contacts in the database.

Interrupting a conversion

To interrupt a conversion, click on the stop button on the front form of ACT-To-Outlook Professional and the conversion will stop. Remember, the stop button only comes visible when a conversion is in progress.

5.1 Empty Contact Names

You will receive the screen below if ACT-To-Outlook Professional encounters a contact that has no name. Outlook establishes the basis for all task, calendar, and journal entries via a linking system on the existence of a valid name i.e. a name other than empty. Hence, ACT-To-Outlook Professional checks whether first and last name are set for the contact. When these fields result in empty, the "No name for this contact" dialog appears.

When this dialog appears, you are provided with the contact details via the roll down list and you can take the following actions:

1. **You can ignore this contact.** ACT-To-Outlook Professional then continues to process the next contact
2. **You can set the name for the contact to be set in Outlook.** Enter the name in the name box to enter the new name. You can look through the list and determine what the name of the contact is.
3. **Apply Button.** This instructs ACT-To-Outlook Professional to continue processing. Remember, if the blank name contact has any activities, todo's, calendar, or journal entries, they will not be linked to the contact
4. **Cancel Conversion Button.** This instructs ACT-To-Outlook Professional to cancel the conversion of the ACT! Database into Outlook.
5. **Do not ask again.** Instructs ACT-To-Outlook Professional to continue processing this contact and in the event of another contact being blank named, continue processing.



5.2 Background Processing

ACT-To-Outlook Professional can be run in the background if the command -Background is passed to it.

The best way to do this is to add this command to the Windows Scheduler and run the software periodically.

Here's an example of a command line that would start ACT-To-Outlook Professional in the

background:

To Convert All the Contacts:

C:\Program Files\ACT-To-Outlook Pro\act2opro50.exe -B -A -V -M

To Convert a Stored Group

C:\Program Files\ACT-To-Outlook Pro\act2opro50.exe -B -G -V -M

To Convert a Stored Lookup:

C:\Program Files\ACT-To-Outlook Pro\act2opro50.exe -B -L -V -M

To Convert the calendar:

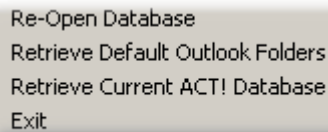
C:\Program Files\ACT-To-Outlook Pro\act2opro50.exe -B -N -V -M

This instructs ACT-To-Outlook Professional to process all contacts in background mode. The following options are available to ACT-To-Outlook Professional

- B - Process the contacts in the background
- V - Enable verbose processing
- G - Convert using the A2O Group settings
- L - Convert using the A2O Lookup settings
- A - Convert All (no filtering)
- C - Convert the current contact
- K - Convert the current ACT! lookup.
- N - Convert calendar items only

Note: Make sure that ACT-To-Outlook Professional is working properly before scheduling for background processing.

5.3 File Options

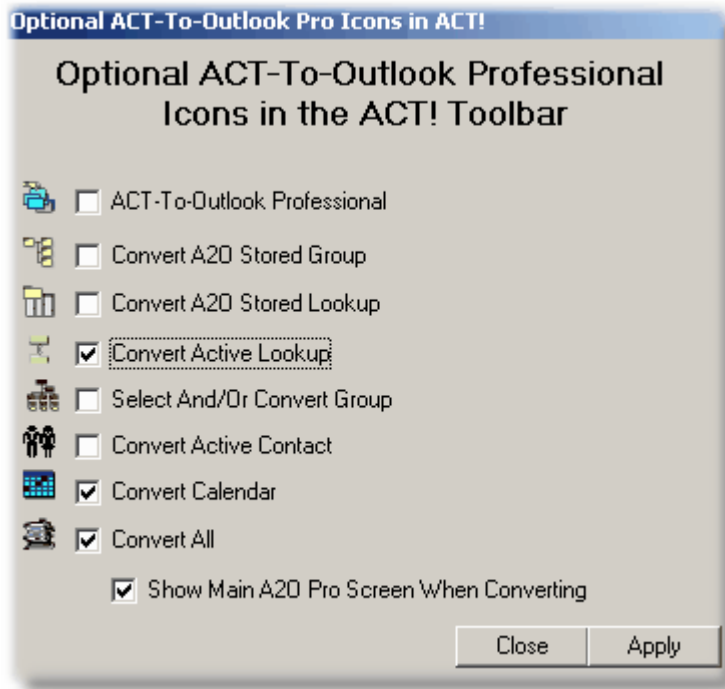


Re-Open Database
Retrieve Default Outlook Folders
Retrieve Current ACT! Database
Exit

In the File Options, you are provided with 4 options:

- Re-Open the Database. This will reset the current username/passwords and re-open the database.
- Retrieve Default Outlook Folders. This option will open Outlook and retrieve all the default folders
- Retrieve CurrentACT! Database. This option will retrieve the current ACT! Database that is being accessed via the ACT! interface. You must have ACT! open for this feature to work.
- Exit. As said, it will exit.

5.4 Adding Icons to ACT!



This option is accessed through the Tools Menu. By enabling/disabling each icon, you can add or remove the icons from the ACT! toolbar for fast access to ACT-To-Outlook Professional features.

Icons and what they represent:



[ACT-To-Outlook Professional Icon](#)

This is ACT-To-Outlook Professional's icon. Installing this icon on ACT!'s toolbar allows you to have direct access to the software by simply clicking on the icon.



[Convert A2O Stored Group](#)

This icon converts the stored group that is selected using the groups and lookup tab. It will either show the whole main screen of A2O Pro if "Show Main A2O Pro Screen When Converting" is set or it will only indicate to the user when it starts and when it finishes converting when "Show Main.." is unset.



[Convert A2O Stored Lookup](#)

This will convert the stored lookup that exists in the Groups and Lookup Tab. It will either show the Main A2O Screen when "Show Main A2O Pro Screen" is set or it will only provide start and finish prompts.



[Convert Active Lookup](#)

This icon, when pressed, will start the conversion of the Active Lookup in ACT! i.e. the lookup that the user is currently looking at in ACT!. So you can establish a lookup in ACT!, filter out contacts from the lookup and then convert the lookup. A2O Pro will go through the lookup and establish a selection of the contacts. Consequently, it will convert the contacts. Also, the "The Show Main A2O Pro Screen" will show the main screen while converting (when set) or will only show the start and end of the conversion.



[Select and/or Convert Group](#)

This icon will display a tree structure of the groups available in the database. You then select which group you want to convert and then press the convert button. This feature will display the main screen while converting and it unaffected by the "Show Main Screen" option.



[Convert Active Contact](#)

The contact being displayed by ACT! is converted.



[Convert Calendar](#)

Only the contacts with which the Current User has calendar items associated with are converted.



[Convert All](#)

All the contacts are converted in the database. This option will show the main screen when "Show Main Screen" is set or it will only prompt for the beginning and end of the conversion.

In essence, when the "Show Main A2O Pro Screen When Converting" is set, the user gets informed when the conversion begins and end.

5.5 Group Conversion

ACT! provides users with 2-level groups while Outlook only provides users with single level Categories. Hence, when groups are converted into Categories, the groups are defined in the following manner:

Master_Group is converted into Master_Group

Master_Group with Subgroups is converted in Master_Group.Subgroups where the . defines the sub groups.

ACT-To-Outlook Professional

Accurately convert ACT! Databases into Outlook

Part



VI

6 Tips and Tricks

The following Topics are available:

- Increasing Speed
- Converting Addresses
- Errors

6.1 Increasing Speed

One of the major issues with ACT-To-Outlook Professional is speed. Unfortunately, the processing is slow due to 2 major factors:

1. The slow speed of ACT!
2. The slow speed of Outlook

In addition, if you are doing processing across a network, the performance will also decrease. Hence, a few things that may make life easier:

- Try to do processing on the local drive as much as possible. Retrieving data across a network is cumbersome and slow.
- Have Outlook fetch all the email before the processing begins. When Outlook is downloading email, our software cannot access the data structures.
- Use History Filtering. Convert only the items in History that you want in addition to the using Date Filtering to reduce the amounts of history items being converted/analyzed.
- Disable Email Retrieval on the Outlook Account.
- Run the process in the background so that you don't have to be there when converting.
- When converting to an empty contact folder, disable duplicate checking. That will increase speed by 40%
- If you have a fixed conversion base, enable the Intelligent Updater and that may increase full conversion speeds by up to 1000%

Stepwise Conversion Options

From experience and from the latest versions of ACT! and Outlook, we've found that the best way to convert the data is to do it in different steps:

1. Convert the contact data first. Disable all the conversion of todo's, call's, meetings and specially history. Also, disable duplicate checking.
2. Make sure that the quantity of history records is less than 16,000. Limit their conversion by setting the date filter so that unnecessary history records are not converted. Enable duplicate checking here to convert the records.

6.2 Converting History

In order to speed up conversion, it is recommended that you restrict the conversion of history items. This can be done in several ways:

1. Set a date in the date filter as the earliest date to convert
2. Remove (clean) your ACT! database of any old history records
3. Only transfer usefull history records i.e. notes and so on. Do not transfer field changes and other historical data that does not really have any effect on the contacts data.

6.3 Converting Addresses

In Outlook, street addresses are represented differently than in ACT! In ACT!, street addresses are 3 fields while in Outlook it is only 1 field. ACT-To-Outlook Professional provides users with the capability to Merge all three addresses into 1 Outlook Field. In addition, it will also convert the 2 fields that ACT! has for representation of Home Address into 1 Outlook Field.

To enable this feature, click on the "Merge Address 1, 2 and 3 into one string" option in the conversion options.

Note: You must enable Address 1 and Home Address 1 to be converted in the Contact Field Mappings. Otherwise, ACT-To-Outlook Professional will ignore the Address conversions.

6.4 Limitations

Outlook Folder Limitation

ACT-To-Outlook Professional limits the number of entries on an Outlook Folder to 12,000. Any entries beyond 12000 items, a new folder is created of the same type and the additional entries are posted to this "overflow" folder. In most cases, this applies primarily to the Journal folder where thousands of ACT! history items are stored. When the Journal folders exceeds 12,000 items, additional folders are created namely Journal1, Journal2 and so on...

Outlook 2000 and 2002 limits the number of entries for folders to 16K. From our experience, if you put more than 12,000 items in a folder, Outlook's performance degrades tremendously and in some cases it even locks up. Hence, we've put a limit of 12,000 items for the folder.

If you happen to have multiple folders that were created during the conversion, you must expand the search path of the Contacts folder to include the additional folders from the conversion. This is done by right clicking over the contact folder and selecting Properties. Then modify the Activities Tab to include the additional folders in the search path. The reason for doing this is to make sure that when you press the Activities Tab that Outlook will search all the proper folders for related activities to the contact.

Duplicates

Duplicates are only checked on the folders that are set. Duplicates are not checked on overflow folders. If you happen to have overflow folders, clean up your database or use a date filter to reduce the size of the folder.

Memory Limitations

ACT-To-Outlook Professional may run out of memory under the following circumstances:

- If you enable History Recording to the Contact Body Text and you have a large number of history records for that contact. This occurs primarily when you are converting My Records or a record that has thousands of history entries. ACT-To-Outlook Professional will save the history into a local temporary file and then read that file to the Outlook contact record. However, if the file is too large, Outlook will run out of memory and the history can't be converted.

Solution: Either clean up the history in ACT! and erase all old records or set the date filter in ACT-To-Outlook Professional to only pick Activity items after a certain date.

6.5 Errors

ACT-To-Outlook Professional errors are generally followed by a code and a string that explains the error. From past experience, ACT-To-Outlook Professional generates very few errors once it is setup. The product has been out for over 2 years and we believe that most bugs have either been found or exterminated (literally). Ever so often we get calls re. errors and here is a list of actions you can take to resolve the error:

Errors with retrieving Outlook Folders

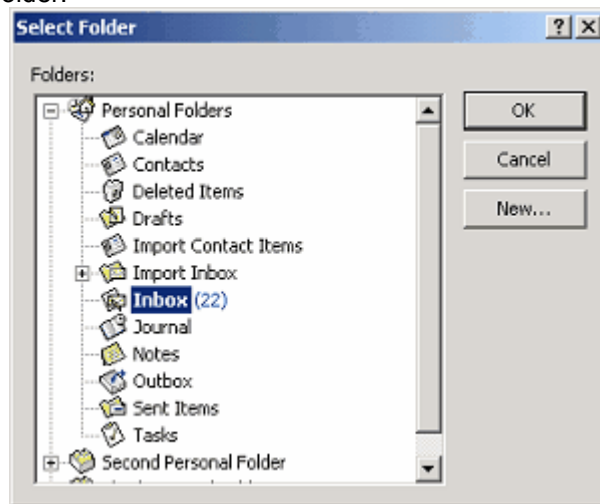
This error occurs when you've changed folders in Outlook and ACT-To-Outlook Pro cannot find the default folder. The message is in general:

"ACT-To-Outlook Professional: Error on retrieving Tasks Folder"
"ACT-To-Outlook Professional: Error on retrieving Contacts Folder"
"ACT-To-Outlook Professional: Error on retrieving Appointments/Calendar Folder"
"ACT-To-Outlook Professional: Error on retrieving Journal/Activities Folder"

"ACT-To-Outlook Professional: Error on retrieving Notes Folder"

Solution 1

1. Click on the Outlook Folders Tab
2. Click on the Pick Folder button for each Outlook Folder and select the corresponding Outlook folder.



3. Do this for each folder.

Solution 2

1. Click on File->Retrieve Default Outlook Folders. This will retrieve the Outlook Default Folders into the folders in question and reset them to the default.

Note: This section is new and we will be expanding it re. any issues with errors with ACT-To-Outlook Professional. Check our online help for any additions and solutions before you contact ACT-To-Outlook.com.

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