

*ACT-To-Outlook Professional  
2005/2006 Edition*

*Designed for ACT! 2005 and 2006*

**Printed Manual**

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# ACT-To-Outlook Professional 2006 Edition

**Accurately transfer 2005/2006/2007 ACT! Databases into Outlook**

*by ACT-To-Outlook.com Inc.*

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## **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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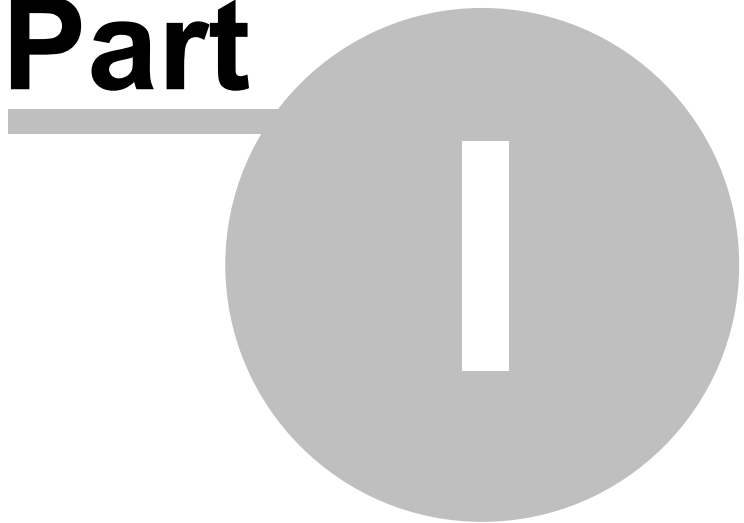
# Foreword

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

# **ACT-To-Outlook Professional 2006 Edition**

Accurately Transfer ACT! 2005/2006 Databases into Outlook

# **Part**



## 1 Welcome

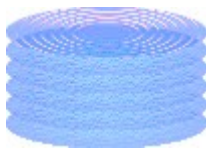
### **ACT-To-Outlook Professional** **2005/2006 Edition**

### **The Ultimate ACT 2005/2006->Outlook Tool!**

Never has such a complete and powerful tool been available to maintain your ACT! 2005/2006 data in Outlook.

### **Multiple ACT! Users->Multiple Outlook Folder Configurations**

ACT! Multi-User Database



Outlook 2000, 2002, 2003



A multitude of *mixed* folder configurations can be run simultaneously from ACT! to Outlook. Users can have individual or shared Outlook folders!

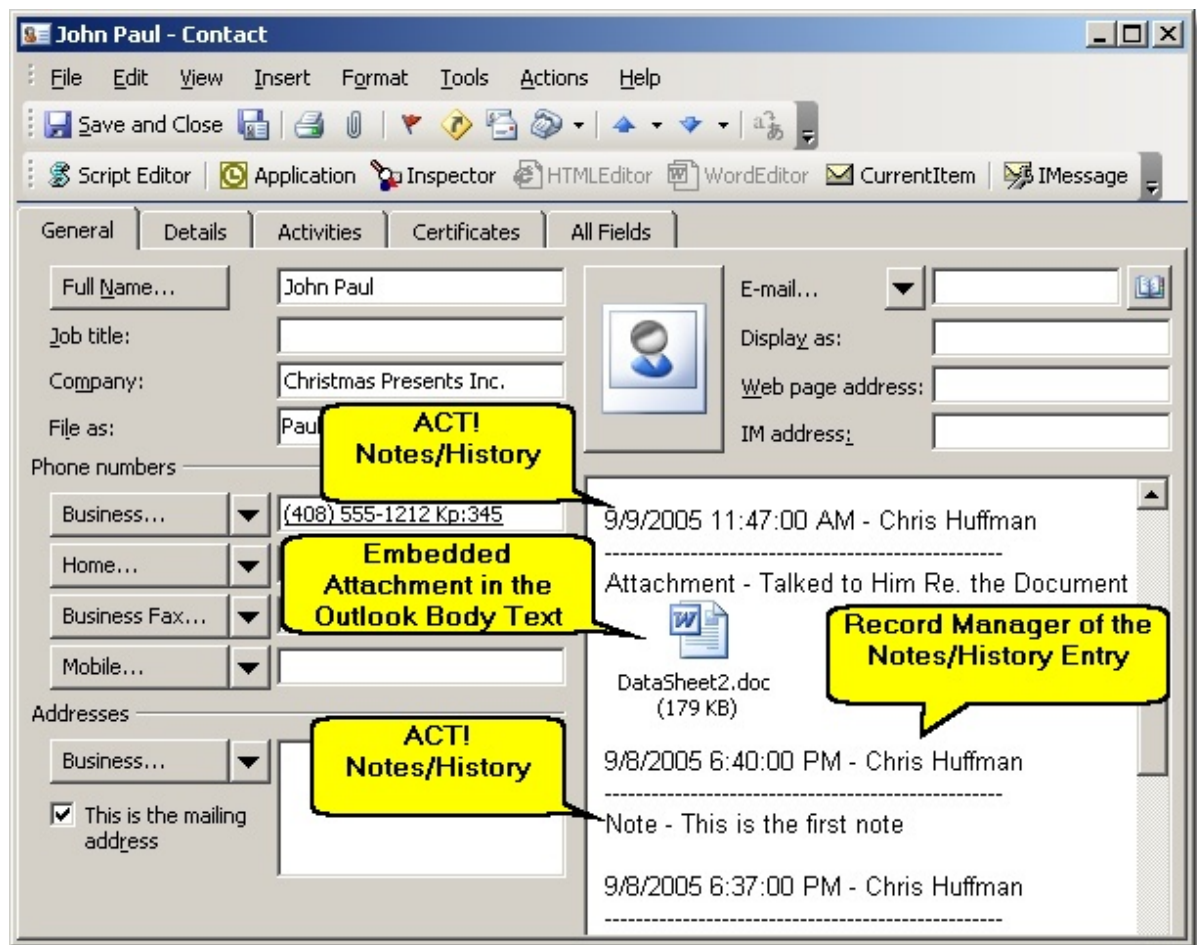
### **Compatible with ACT 2005/2006 and Outlook 2000 SR-\*, Outlook 2002 and Outlook 2003!**

The purpose of ACT-To-Outlook Professional 2005/2006 Edition is to provide users with a tool to quickly convert, update, and transfer a multi-user ACT! Contact database into multiple individual or shared Outlook Folders. Enhanced filtering system and options allow you to slice which segments of the ACT! database that you want to bring over to Outlook.

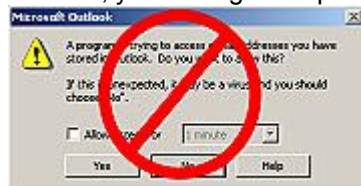
#### **Highlights of ACT-To-Outlook Professional 2005/2006 Edition:**

- **Single Click Multi-User Conversion.** Use either our standard field mapping or setup your own customized field mapping, select which users and their respective Outlook folders and then simply click on the Convert button to convert all the users.
- **Unrivaled ACT! History to Outlook Contact Body Text mapping.** Convert all the ACT! history items to the Outlook contact body text. All of the contact's attachments are brought over and accessible from within the Outlook Contact form. In addition, every history item's owner is listed with the text!

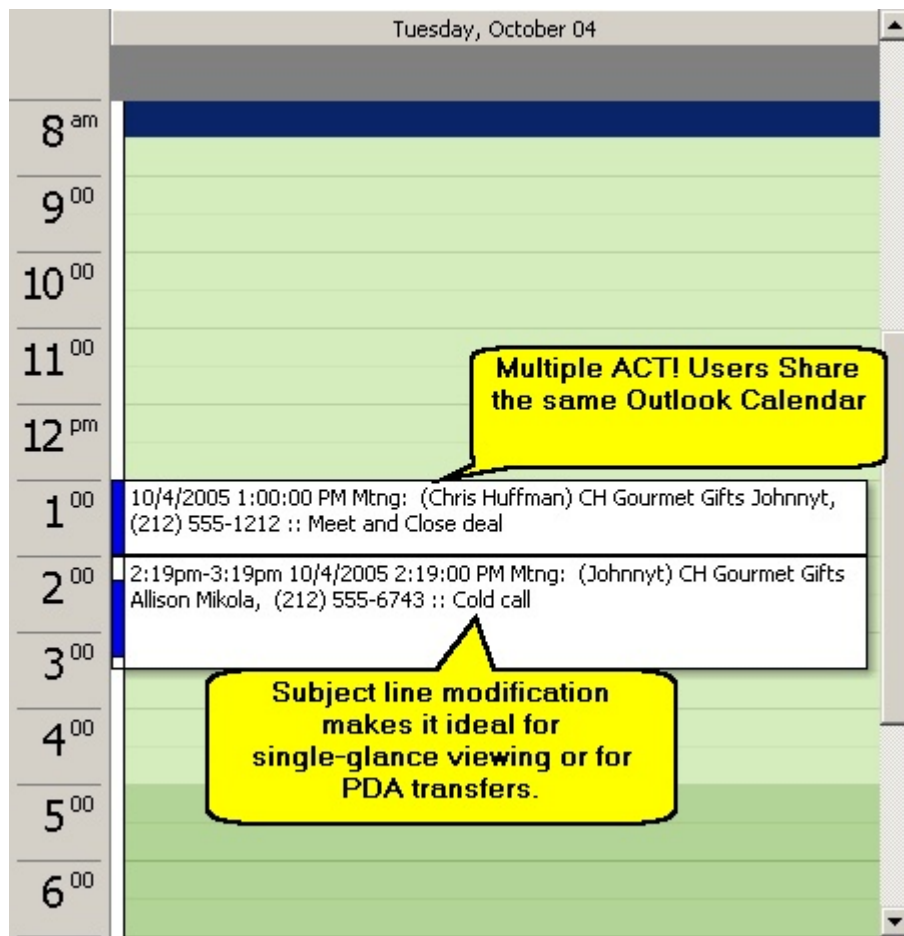




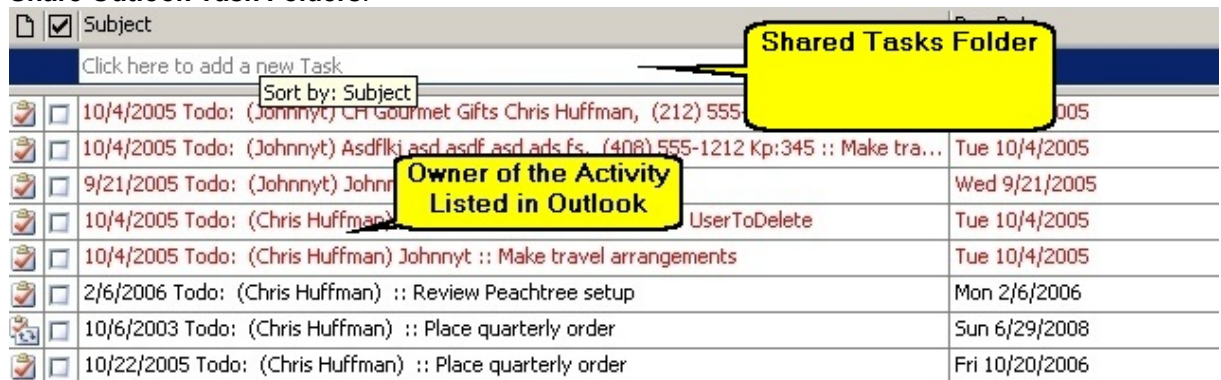
- **ACT! Email to Outlook .msg support.** Convert ACT! Emails that reside in the history to Outlook .msg messages.
- **Group, Query, Calendar and Ownership support.** Filter selected contacts by Group, Query, Calendar or Ownership to be converted.
- **Integrated with Outlook.** Closely integrated with Outlook for easy of use and fast conversions. In addition, you don't get the persistent Outlook security warnings during the conversion.



- **Speed.** ACT-To-Outlook Professional 2005/2006 Edition is the fastest conversion tool around, in most cases 2000% faster than the closest rival. Once the first conversion is done, updates are fast.
- **Powerful Activities Options.** Activities are converted over and you can tag the activities with a variety of items that make it ideal for PDA's. Share calendars and more...



- **Share Outlook Task Folders.**



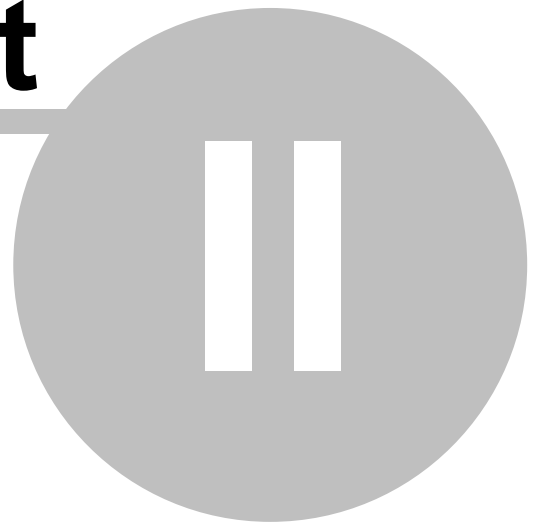
- **And much, much more....**

# **ACT-To-Outlook Professional 2006 Edition**

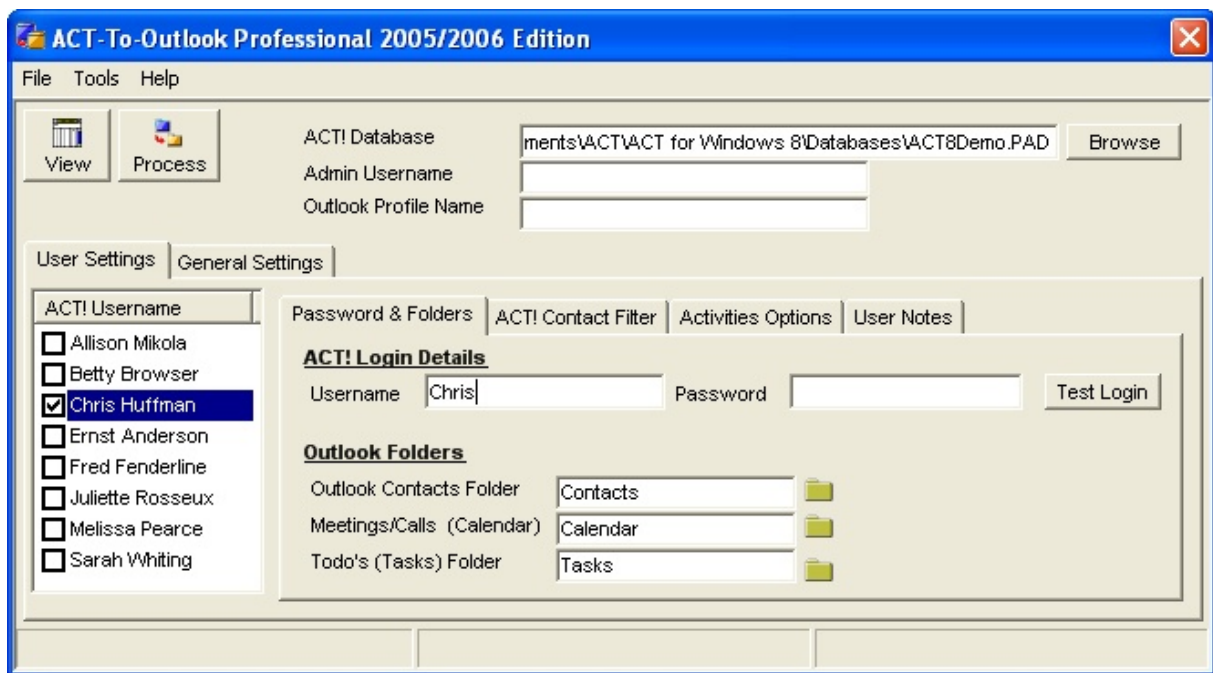
Accurately Transfer ACT! 2005/2006 Databases into Outlook

## **Part**

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## 2 Introduction



The purpose of ACT-To-Outlook Professional 2005/2006 Edition is to provide users with a tool to quickly convert, update, and transfer a multi-user ACT! Contact database into multiple individual or shared Outlook Folders. Enhanced filtering system and options allow you to slice which segments of the ACT! database that you want to bring over to Outlook.

### 2.1 Why Use ACT-To-Outlook Professional 2005/2006 Edition

ACT-To-Outlook Professional 2005/2006 Edition 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. In addition, Outlook folder sharing and intelligent multi-user management makes this product the leading solution to share your ACT! Data with Outlook.

#### [Major Features](#)

<b>Ease of Use</b>	Install, and you are ready to go. Merge and folder flexibility allows you to keep your ACT! Contacts updated with your Outlook.
<b>Multi-User Support</b>	ACT-To-Outlook Professional - 2006 Edition supports ACT! Multi-User configurations and properly converts the activities relating to all the users enabled to be converted.
<b>ACT! Versions Supported</b>	ACT-To-Outlook Professional - 2006 Edition supports ACT! 2005/2006. It does not support ACT! 2000 or 6.0.
<b>Outlook Versions Supported</b>	Outlook 2000 SR-* and above, Outlook 2002 and 2003 are all supported.
<b>Field Conversion Capabilities</b>	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.
<b>Field Remapping Capabilities</b>	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 2005/2006 Edition.
<b>ACT! Items Converted</b>	<p>The following ACT! Items are converted to Outlook equivalents:</p> <ul style="list-style-type: none"> <li>• <b>Todo's</b> - ACT! Todo's are converted into Outlook Tasks with the same time-reoccurring properties.</li> <li>• <b>Calls</b> - ACT! Calls are converted into equivalent Outlook Calendar.</li> <li>• <b>Meetings</b> - ACT! meetings are converted into Outlook Calendar.</li> <li>• <b>History/Notes</b> - All ACT! history items can be converted into the Outlook contact body text. All attachments and note ownership are converted and can be viewed in the contact's body text.</li> <li>• <b>Attachments</b> - Note and History attachments are converted into Outlook Embedded Attachments that can be viewed directly from the contact body text.</li> <li>• <b>ACT! Email</b>. ACT! Email is converted into Outlook .msg format (excluding embedded attachments).</li> </ul>
<b>Attachments</b>	No longer are attachments lost in the conversion. All attachments are added to the contact body text where you can see it and open it with the click of a button.
<b>Selective Conversion</b>	You can choose to convert All, Group, or Calendar.
<b>Group Conversion</b>	You can select contacts belonging to an ACT! group and convert only the group.
<b>State-of-the-art duplicate checking</b>	<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"> <li>• If it exists on our index database and if it has been transferred to Outlook.</li> <li>• Email Address.</li> <li>• First and Last Name and City</li> <li>• Company Name and City</li> </ul> <p><b>Outlook Item Move Capability</b></p> <p>With our system, you can convert locally and then move the items (contacts, calendar and tasks) into another Outlook folder with no resulting duplicates when converting again.</p> <p>Once the first conversion has been made, ACT-To-Outlook Professional 2005/2006 Edition keeps a 1-to-1 match between the ACT! database and the corresponding Outlook item so that no duplicates are ever created.</p>

## 2.2 Version History

### March 15, 2006, Release V 8.2.0.0

**General Comments.** Continued improvements to the product aimed to enhance support for ACT!->Outlook duality. New support for conversion of ACT! email to Outlook .msg is a major step on maintaining the data consistent between ACT! and Outlook.

#### **Improvements/New Features.**

- ACT! Email Support. ACT! Emails attached to a contact's history and notes can be converted into Outlook .msg equivalents (less any email attachments).
- File As Options. Added the File As options to be able to select just the last name of a contact and the remainder of the full name. This resolved a lot of filing issues when converting names like First & Wife Lastname. Much cleaner.
- Outlook Cleaner. Added Outlook Clean where you can remove all the data in Outlook with the click of a button.
- Improved the Create Outlook Export Folder Tree Tool. More modifications and options were made available for this great tool.
- Better Help. Improved the help file both online and the help topics.

### March 8, 2006, Release V 8.1.6.0

**Bug Fix.** On certain databases, the software would produce a Memory Overflow when retrieving the activities from the ACT! database. That is now fixed.

### February 26, 2006, Release V 8.1.5.0

**General Comments.** This product keeps improving to provide the absolute best interface, the fastest speed and the biggest offering of innovative features. This release added a few more improvements that we saw lacking on the original release.

#### **Improvements/New Features.**

- Secondary Contacts Transfer. We added the capability to transfer secondary contacts. These contacts come over as user defined properties to the Outlook Contact.
- Sales Opportunities. We now transfer sales opportunities to the contact body text. Quite neat. Get all the sales info on your Outlook or your PDA/Cell Phone.
- Customizable Sales, Notes, and History headers. You can now customize the headers used to generate the sales, notes and history lists to anything you want, including a foreign language.
- Improved the Create Outlook Export Folder Tree Tool. This tool keeps getting better. You can save time and effort by using this fabulous tool.
- Better Help. Improved the help file both online and the help topics.

### February 9, 2006, Release V 8.1.0.0

#### **Improvements/New Features.**

- International Country Codes. Added support for these
- Enhanced Custom Field generator makes matching and generating custom fields a breeze.
- Create Outlook Export Folder Tree Tool. Improved the tool tree creation to have 3 options. This reduces folder selection by
- Better Help. Improved the help file both online and the help topics.
- Activity Processing. Added speed and intelligence to activity processing therefore increasing efficiency by over 1000%.
- Annoyance Reduction Measures. Changed the behavior of password acceptance and storage so that you only need to enter a password once. Added quick options to the Outlook Clean list so that you can select all contacts with the click of a button. Added more speed on the outlook cleaning process. And much more... Over 85 annoyance reduction measures.

### January 6, 2006, New Release V 8.0

This release is compatible with ACT! 2005 and 2006 and can be downloaded directly from the Download area.

## 2.3 Help on ACT-To-Outlook Professional 2005/2006 Edition

You can obtain help for ACT-To-Outlook Professional 2006 Edition in the following ways:

- **The help file shipped with the product.** The help file provided with ACT-To-Outlook Professional 2006 Edition is the most recent help file when this version 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 the online help, go to the Help menu on the software.
- **Printed Version of this Help File.** You can download the made-for-print version of this help file from the Help menu on the software. You will need to have the Adobe .pdf reader installed on your system. To download the Adobe .pdf reader, [click here](#). To print the manual, click on the print button of the .pdf reader and the manual will then be printed on your local printer.
- **Email Support.** You can obtain free email support from PersonalCRM. Make sure that you explain your problem/question with as much detail as possible. Use the support form on our web to contact us at [ACT-To-Outlook.com](#). [Click here](#) to submit your problem report.
- **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](#). A support professional will call you (US Only). 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 2005/2006 Edition



ACT-To-Outlook Professional 2006 Edition is distributed worldwide by a variety of resellers and distributors.

### **To Purchase**

Click on the Registration->Purchase menu option of ACT-To-Outlook Professional 2006 Edition and you will be taken to the purchase page for the product.

### **Home page**

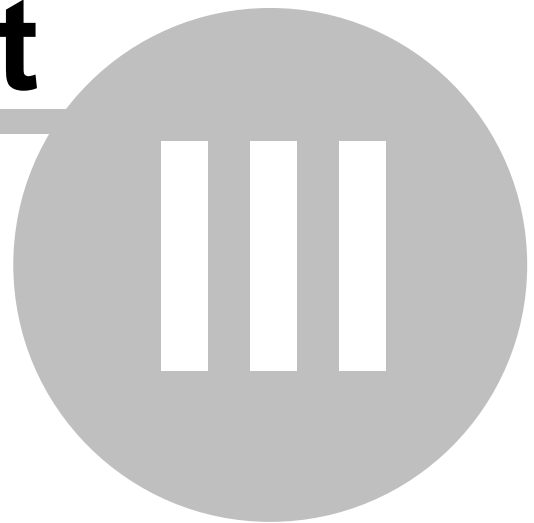
<http://www.ACT-To-Outlook.com>

# **ACT-To-Outlook Professional 2006 Edition**

Accurately Transfer ACT! 2005/2006 Databases into Outlook

## **Part**

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## 3 Installation

Installation of ACT-To-Outlook Professional 2006 Edition is straightforward. The following is needed

- You'll need approximately 60mb of hard disk space if you do not have the .Net framework installed.
- ACT! 2005 or 2006
- Administrator Privilege if running Windows XP, XP Pro, and 2000

To install, simply execute the ACT-To-Outlook Professional 2006 Edition executable and follow the directions to install the program.

Once installed, ACT-To-Outlook Professional 2006 Edition is accessed via the Start->Programs->ACT-To-Outlook Professional 2006 Edition Menu.

### Sub-topics

ACT-To-Outlook Professional 2006 Edition Compatibility

Lists the system with which ACT-To-Outlook Professional 2006 Edition is compatible with.

License Registration

Instructions on the procedures on registering ACT-To-Outlook Professional 2006 Edition

End-User License Agreement

Uninstall

### 3.1 ACT-To-Outlook Professional 2005/2006 Compatibility

ACT-To-Outlook Professional 2006 Edition is an Addon Product for ACT!. Hence, it requires the user to have ACT! installed on the machine. ACT-To-Outlook Professional 2006 Edition is **ONLY** compatible with ACT! 2005/2006. For versions of ACT-To-Outlook Professional compatible with other versions of ACT!, come to our web site at ACT-To-Outlook.com.

#### ACT! 2005/2006 compatibility

ACT-To-Outlook Professional 2006 Edition is compatible with the following versions of ACT!:  
ACT! 2005 (7.0), and ACT! 2006 (8.0)

#### 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.

#### Outlook Compatibility

ACT-To-Outlook Professional 2006 Edition is compatible with Outlook 2000 service pack 1 or higher, Outlook 2002 and Outlook 2003

### Operating System Compatibility

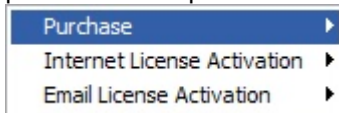
ACT-To-Outlook Professional 2006 Edition is compatible with the following Windows operating systems:

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

## 3.2 Registration

### Purchasing ACT-To-Outlook Professional 2006 Edition

To purchase ACT-To-Outlook Professional 2006 Edition, 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.

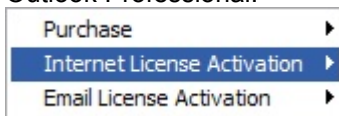


### ACT-To-Outlook Professional 2006 Edition Registration

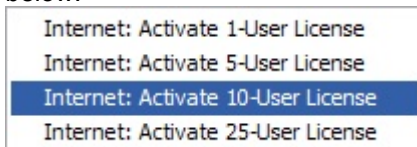
ACT-To-Outlook Professional 2005/2006 is licensed by the number of users that have an account in the ACT! database.

**The software will not allow you to activate if you have a larger number of users than the license allows.**

When you purchase ACT-To-Outlook Professional 2006 Edition, 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 your product so that it works unencumbered, you need to enter the license number. You need a valid internet connection in order to activate ACT-To-Outlook Professional.



To register, click on the Registration ->License Activation Menu Option and you'll get the screen below:



To activate the product, click on option to which you purchased the license, and you'll get the screen below:



The image shows a 'License Activation' dialog box with the title 'Enter License Key'. It contains four input fields: 'Name' with the placeholder 'Enter name', 'Company' with 'PersonalCRM', 'Email Address' with 'personalcrm@personalcrm.com', and 'License' with '1234-1223-1234-1234'. At the bottom are 'Cancel' and 'Register' buttons.

License Activation	
<b>Enter License Key</b>	
Name	Enter name
Company	PersonalCRM
Email Address	personalcrm@personalcrm.com
License	1234-1223-1234-1234
<div>Cancel Register</div>	

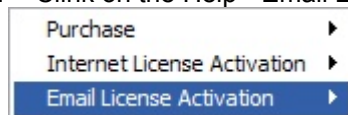
To activate, enter the license in the Registration->License Activation screen. This will register your software with ACT-To-Outlook.com's License Registration Server and enable your product.

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 2006 Edition Registration Problems**

To register, ACT-To-Outlook Professional 2006 Edition 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->Email 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 2006 Edition LICENSE AGREEMENT - ACT-To-Outlook.com Inc.

This is a user license agreement (the "AGREEMENT") between you (either individual or single entity) and ACT-To-Outlook.com, Inc., for the version of the software (the "SOFTWARE") accompanying this AGREEMENT.

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### 3.4 Uninstall

To uninstall ACT-To-Outlook Professional 2006 Edition, do the following:

- Click on [Start->Settings->Control Panel](#)
- Execute [Add/Remove Programs](#) from the Control Panel
- Select ACT-To-Outlook Professional 2006 Edition from the listed programs
- Click Remove and ACT-To-Outlook Professional 2006 Edition will be removed from your system.

#### [A Few Things](#)

- Installing and Uninstalling will **NOT** reset the evaluation period for ACT-To-Outlook Professional 2006 Edition
- Uninstalling ACT-To-Outlook Professional 2006 Edition will not reset the conversion counter

# **ACT-To-Outlook Professional 2006 Edition**

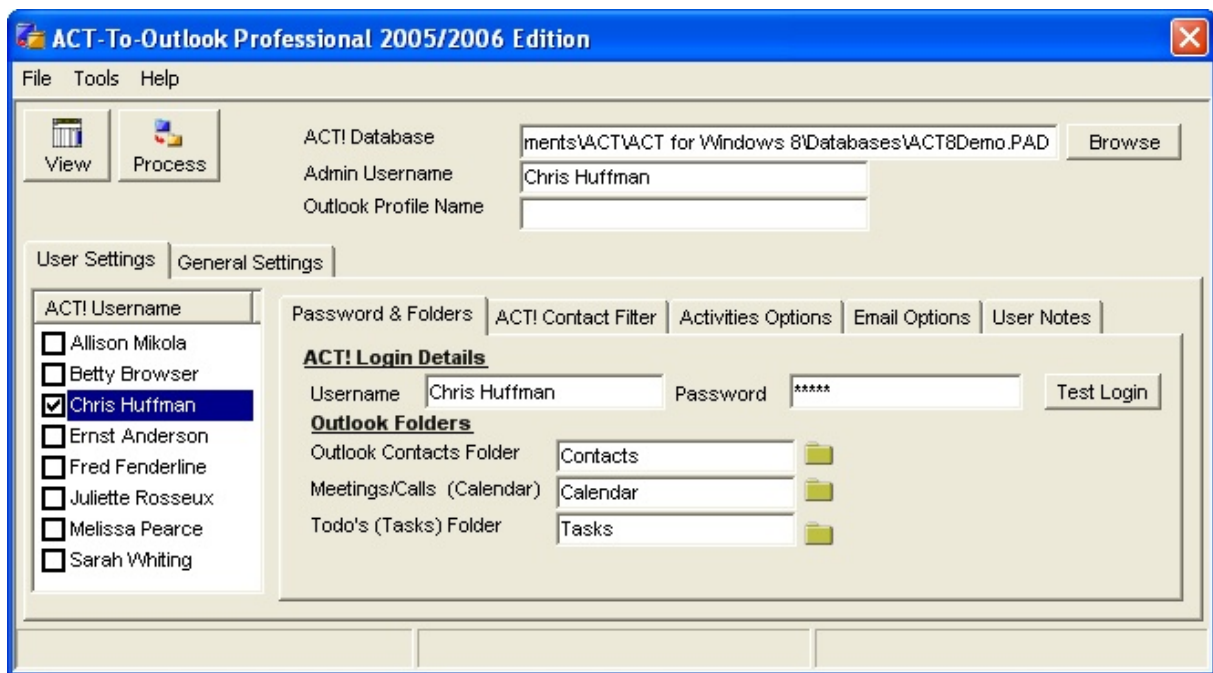
Accurately Transfer ACT! 2005/2006 Databases into Outlook

## **Part**

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# **IV**

## 4 Main Interface



### ACT! Database and Outlook Profile Details

**ACT! Database:** This field contains the path to the ACT! database to be converted. Click on the browse button to select a new database. When a new database is selected, you will be prompted for Username and Password. The username should be someone that has Administration privileges so that the software can access the data properly.

**Admin Username:** This is the name of the ACT! database user authorized to open the database. Use the Tools->Administration option if you want to change the Administration username.

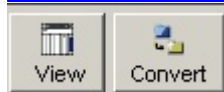
**Outlook Profile:** Some users use Outlook profiles to access Outlook. Use the Tools->Administration options to set/modify the Outlook Profile Name and Password.

### User and General Settings Tabs

**User Settings Tab:** The User Settings Tab provides the list of users as defined in the ACT! Database and each Tab setting is specific to the user and is only used when the user contacts and items are converted.

**General Settings Tab:** The General Settings Tab contains the settings that are applied throughout the whole conversion of all users.

### View and Convert Buttons



**View:** The View button opens the contact view screen.

**Convert:** The convert button activates the Conversion Preview screen

## 4.1 User Settings

The screenshot shows the 'User Settings' dialog box with the 'General Settings' tab selected. On the left, under 'ACT! Username', there is a list of users with checkboxes: Allison Mikola, Betty Brower, Chris Huffman (checked), Ernst Anderson, Fred Fenderline, Juliette Rosseux, Melissa Pearce, and Sarah Whiting. On the right, the 'Password & Folders' sub-tab is active. It contains 'ACT! Login Details' with fields for Username (Chris Huffman) and Password (\*\*\*\*\*), and a 'Test Login' button. Below that, the 'Outlook Folders' section has three rows: 'Outlook Contacts Folder' set to 'Contacts', 'Meetings/Calls (Calendar)' set to 'Calendar', and 'Todo's (Tasks) Folder' set to 'Tasks'. Each folder name is in a text box followed by a folder icon.

### [ACT! Username List](#)

Once the ACT! database has been opened, all the users defined on the database are listed. Each username has its own set of User Settings. To enable an ACT! user to be converted, you must check mark the user. Users not check marked are ignored for conversion purposes.

### [The Password and Folders Tab](#)

This screenshot is identical to the one above, showing the 'User Settings' dialog box with the 'General Settings' tab selected. The 'Password & Folders' sub-tab is active, showing the 'ACT! Login Details' and 'Outlook Folders' sections. The 'ACT! Username' list on the left has 'Chris Huffman' checked.

In the Outlook Folders Tab, the destination folders where ACT-To-Outlook Professional 2006 Edition deposits the data are defined.

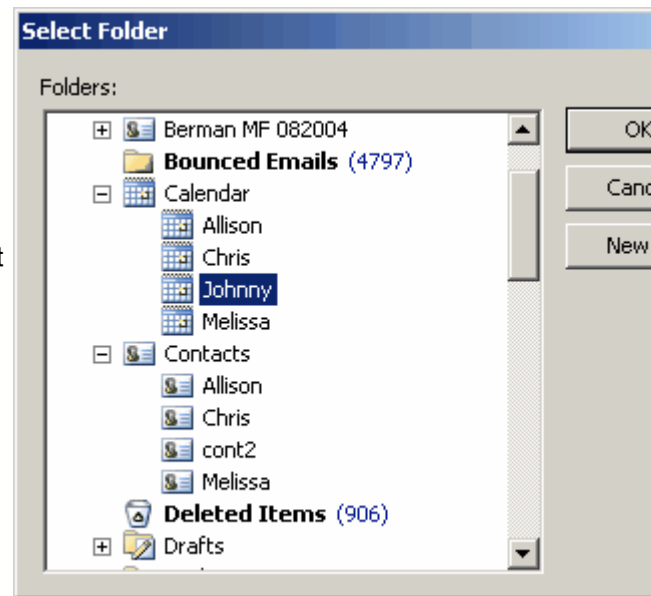


With ACT-To-Outlook Professional 2006 Edition you must select which Outlook folder you want to deposit or update the data from the ACT! 2000/6.0 database. By clicking on the folder button, the Outlook folder selection form pops up which then allows you to enter the destination folder(s) for your conversion.

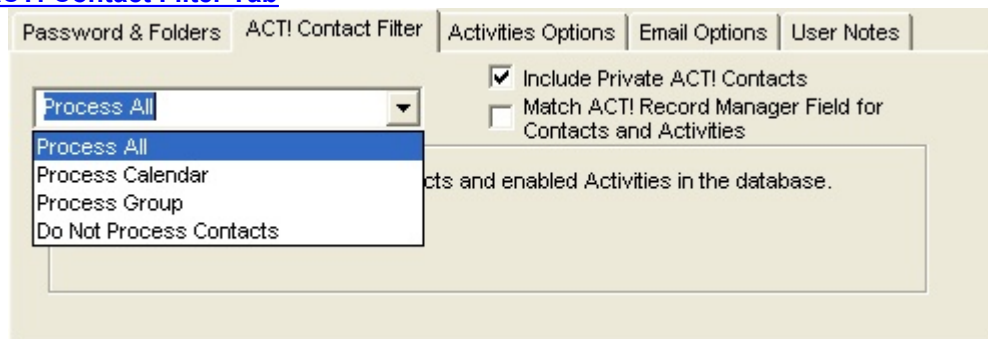
Make sure that the folder selected matches the type that has been requested i.e. Contact Folder should be of type Contact Folder; Appointments folder should be the same as a Calendar folder, etc..

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

Calls and Appointments are deposited into the Outlook Calendar folder while Todo's are deposited to the Tasks folder in Outlook.



### ACT! Contact Filter Tab



Each user has 5 primary filtering options to convert contacts:

1. **Convert All:** All the contacts are converted
2. **Convert Calendar:** Only contacts that have calendar items (calls, meetings or todo's) that are not cleared are selected.
3. **Convert Group:** Convert only a selected group and/or subgroups.
4. **Do Not Convert Contacts:** No contacts are converted for this user.

For more information on Contact Conversion Filters, [click here](#).

**Include Private ACT! Contacts.** When this option is set, private contacts are included in the conversion. If unset, no contacts flagged as private are converted to the Outlook Folder.

**Match ACT! Record Manager Field for Contacts and Activities.** Each ACT! Contact and Activity has a Record Manager Field. When set, only records that have a record manager ID equal to the ACT! User being converted are brought over.

### Activity Options

Password & Folders	ACT! Contact Filter	Activities Options	Email Options	User Notes
<u>Activities to Convert</u>		<u>Subject Line Modification Settings</u>		
<input checked="" type="checkbox"/> Convert Calls	<input checked="" type="checkbox"/> Modify Calendar			
<input checked="" type="checkbox"/> Convert Meetings	<input checked="" type="checkbox"/> Modify Tasks	<input checked="" type="checkbox"/> Add Date		
<input checked="" type="checkbox"/> Convert To Do's	<input checked="" type="checkbox"/> Tag Calls	Call:	<input checked="" type="checkbox"/> Add Name	
<u>Other Options</u>	<input checked="" type="checkbox"/> Tag Meetings	Mtng:	<input type="checkbox"/> Add Company Name	
<input type="checkbox"/> Convert Alarms	<input checked="" type="checkbox"/> Tag Todo's	Todo:	<input checked="" type="checkbox"/> Add Phone Number	
<input checked="" type="checkbox"/> Include Private Activities	<input checked="" type="checkbox"/> Exclude Modifications with MyRecord Info	<input checked="" type="checkbox"/> Add (Owner)		

The Activities Options control which activities are converted and how they are modified in Outlook.

### Activities To Convert

This converts which activities are converted.

**Convert Calls:** Enable/Disable the conversion of calls to Outlook

**Convert Meetings:** Enable/Disable the conversion of calls to Outlook

**Convert To Do's:** Enable/Disable the conversion of calls to Outlook

### Activities Options

**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 pop up 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.

**Include Private Activities.** Enable/Disable the inclusion of Private Activities into the conversion.

### Subject Line Modification Settings.

The idea of subject line modifications of ACT! activities when transferred to Outlook is to provide users with additional contact and activity information by simply looking at the activity (meetings, calls and todo's) subject line. This is very useful when transferring data to a shared calendar or event to a PDA, since most of the important contact data is included in the activity subject line.

**Activity Tags:** These are tags that are added in front of the subject line: For example, the word "Call: " can be added in front of the Call activity being transferred. This word can be edited to anything you wish, for example "Llamada: " if you reside in a Spanish speaking country. Although this is not so important in the Tasks folder, it is important in the Calendar since it helps users differentiate between Calls and Appointments.

### Modification Options

**Modify Calendar:** Enable/Disable the modification of Calendar items (Calls/Meetings).

**Modify Tasks:** Enable/Disable the modification of Tasks items (Todo's).

You can modify and enable/disable the tags that are in front of the subject line to whatever you want.

**Tag Calls:** Enable/Disable the tagging of Calls with a specific tag.

**Tag Meetings:** Enable/Disable the tagging of Meetings with a specific tag.

**Tag Todo's:** Enable/Disable the tagging of Todo's with a specific tag.

**Add Date:** Enable/Disable the addition of the activity date.

**Add Name:** Enable/Disable the addition of the Contact Name with whom the activity is scheduled with.

**Add Company Name:** Enable/Disable the addition of the company name.

**Add Phone Number:** Enable/Disable the addition of the phone number.

**Add (Owner):** Enable/Disable the addition of the activity owner in parenthesis. This is the name

of the ACT! username that is the owner of this activity. This feature is useful if you have multiple users sharing a single calendar/task folder.

**Exclude Modifications with MyRecord Info:** When enabled, the logged user's details are not added to the subject line. This is useful when users have Activities assigned to themselves as reminders of what to do. Obviously one doesn't want the same name over and over on the tasks folder. Hence, this option disables the insertion of the

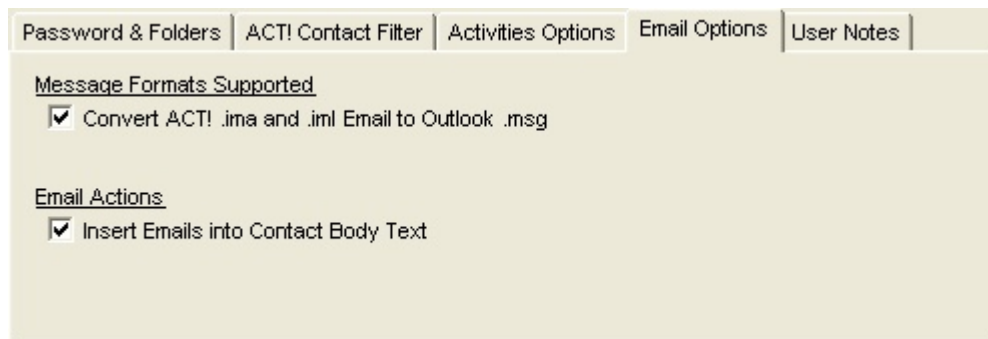
#### Color matched Example of Subject Line Modifications

<u>Date Added</u>	<u>Meeting Tag</u>	<u>Activity Owner</u>	<u>Company</u>	<u>Contact Name</u>	<u>Phone number</u>	<u>Subject</u>
10/4/2006 2:19:00 PM	Mtng:	(Johnnyt)	CH Gourmet	Allison Mikola,	(212) 555-6743	Meet Re. Sales

Activity Subject Line without subject line modifications enabled: Meet Re. Sales

#### Email Options

The email options enables/disables the conversion of ACT! .ima emails into Outlook .msg messages.



- Convert ACT! .ima and .iml Email to Outlook .msg. When enabled, this option convert ACT! .ima and .iml emails into corresponding Outlook emails so that you can open the email directly from the Outlook Contact. Note. This option is only valid if the Attachments option is enabled in the general settings.
- Insert Emails into Contact Body Text. When enabled, the email is inserted into the contact body text as an icon that can be opened directly from the contact. Currently, this is the only option available for email processing. However, more options will be available in future releases.

#### User Notes.

This area is reserved for miscellaneous notes that are pertinent to the user.

### 4.1.1 How to clear an Outlook Folder Link

In some cases you may want to clear a link to an Outlook folder. For example, below, we want to clear Mellisa Pearce's link to Allison's Contact Folder.

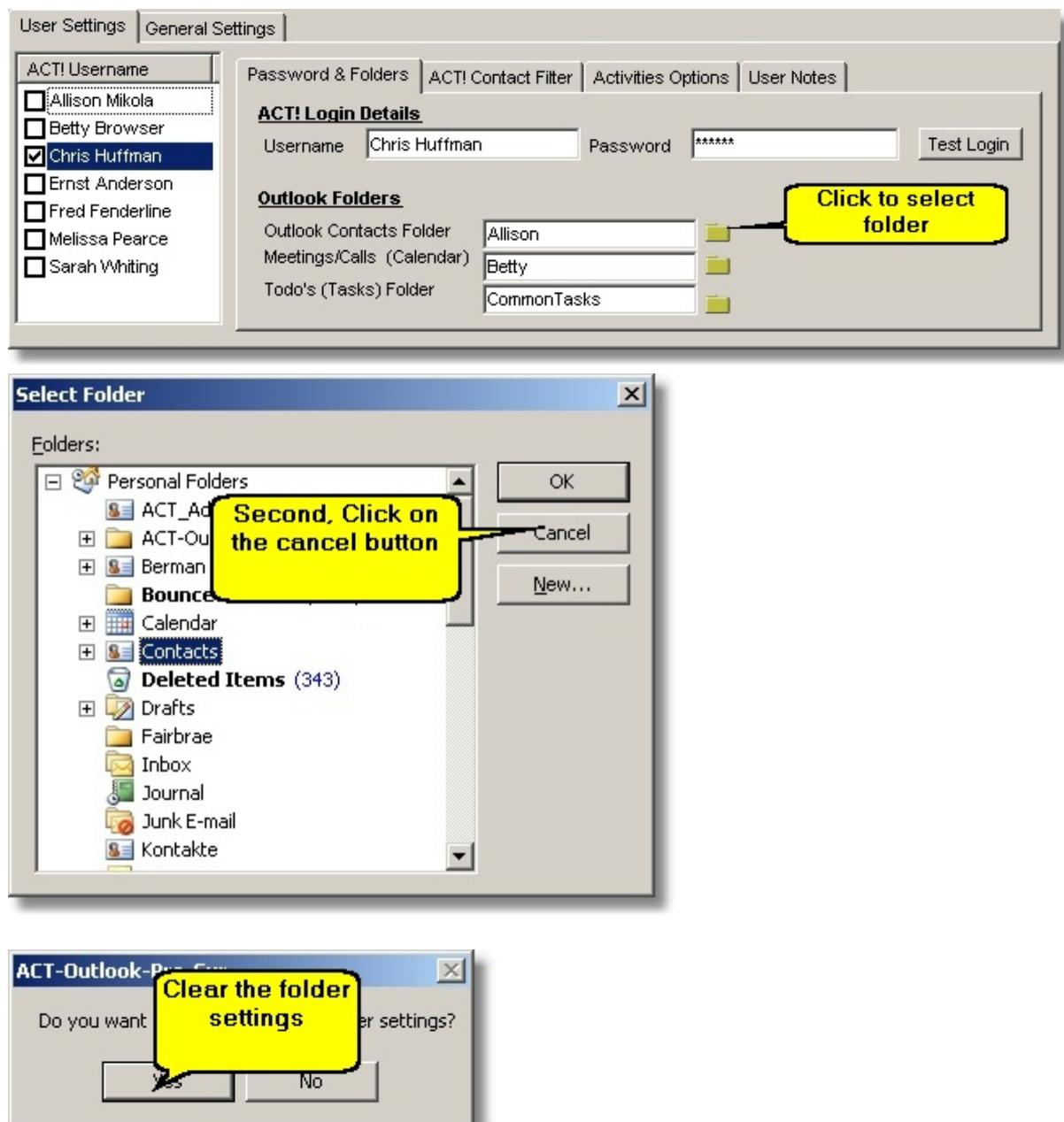
To clear the link,

1. Click on the folder selection
2. Select the Cancel button
3. Select Yes to clear the Outlook entry from the User Settings.

One thing: Only when the last user has cleared the folder link will the relevant Index maintained by the

software be cleared. This means, for example, if you have 3 users pointing to the same Outlook folder, clearing one will not reset the item index for that folder. Only when the last user is disconnected, is the index reset.

#### [Visual Description on how to clear the Outlook Folder Link](#)



### 4.1.2 Contact Filters

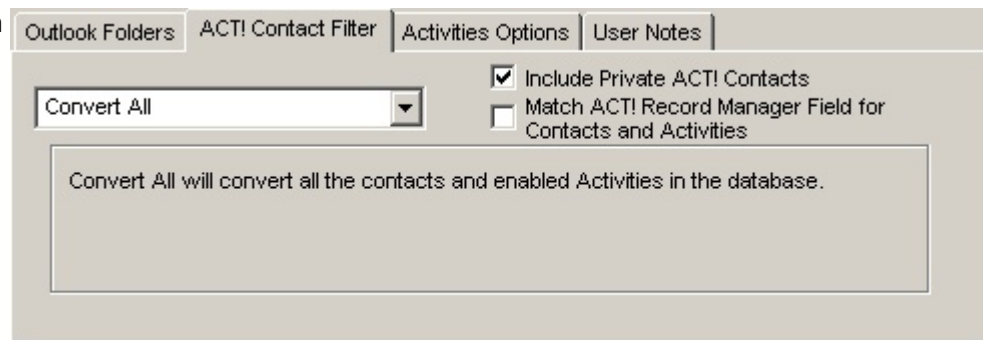
Contact filters allows users to slice the database and only export the data that is needed. In all filter settings, the "Include Private ACT! Contacts" and "Match ACT! Record Manager Field for Contacts and Activities" is applied.

There are 5 type of filters available:

### Convert All

In Convert All, all the contacts in the ACT! database are converted to the user's Outlook Folder.

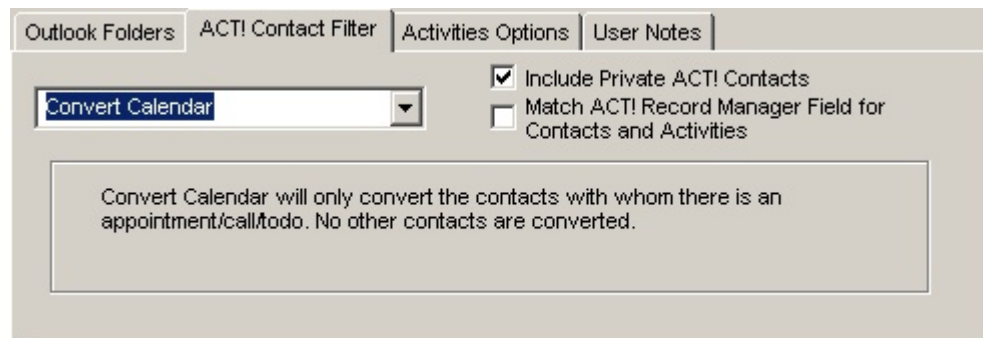
The Inclusion of Private Contacts to the matching of the ACT! Record Manager ID to the Contacts still apply.



### Convert Calendar

In Convert Calendar, only contacts that have a corresponding calendar items i.e. a Meeting, Call or Todo, are converted over to Outlook.

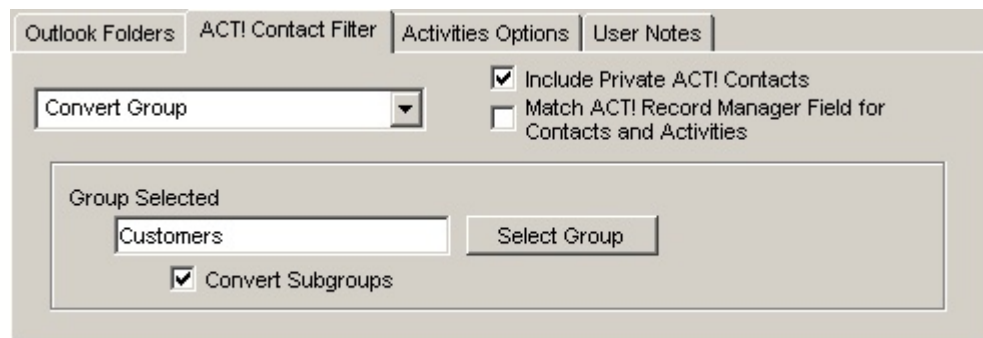
Note: If the contact folder is not set, the calendar items are transferred as independent items and no contact link is established.



### Convert Group

Select a group to be converted using the Select Group button and the group is converted. You can choose to convert the subgroups as well.

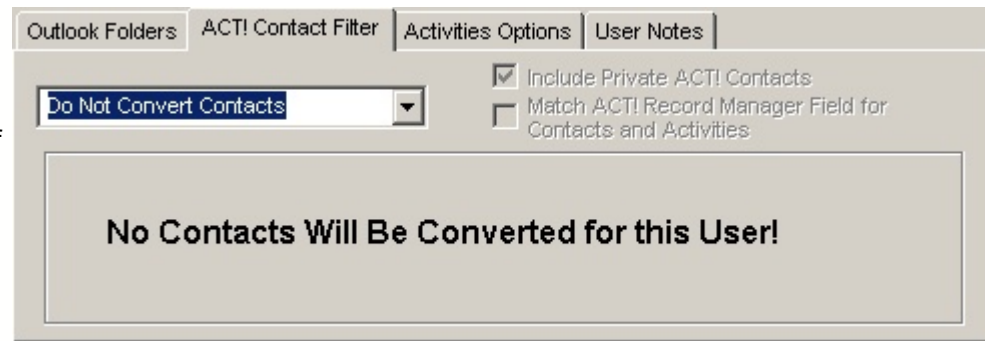
When To Use: When you only want to convert a group (with/without subgroups).



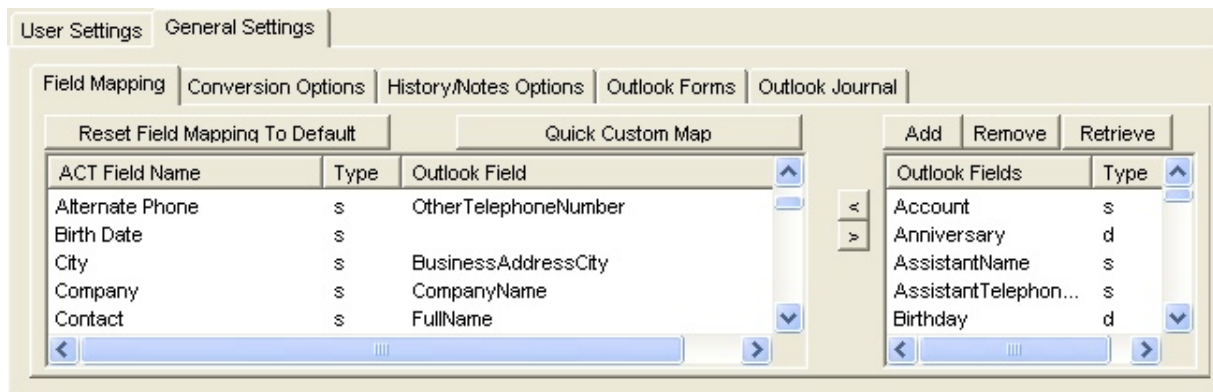
### Do Not Convert Contacts

This option instructs the software Not to perform any conversion activity for this user.

When to User: Use this option if you have multiple users converting contacts to a single contact folder and then converting the activities. If you are sharing a contact folder, make sure the contact folder is set.



## 4.2 General Settings



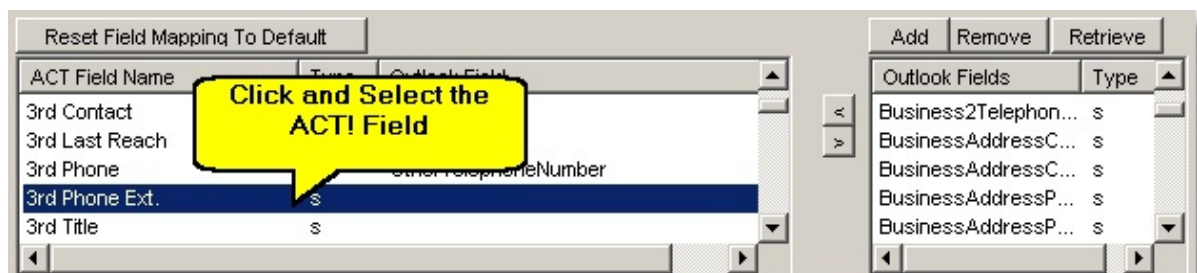
The general settings are used for ALL conversions and apply to ALL users.

### Field Mapping

The field mapping option allows ACT! fields to be matched to their Outlook equivalent. A preliminary set of default matches is provided with the software. However, You can either match other ACT! fields to their "standard" Outlook fields or you can create your own Outlook custom field (please refer to the section on Adding Outlook Custom Fields for more information on this feature).

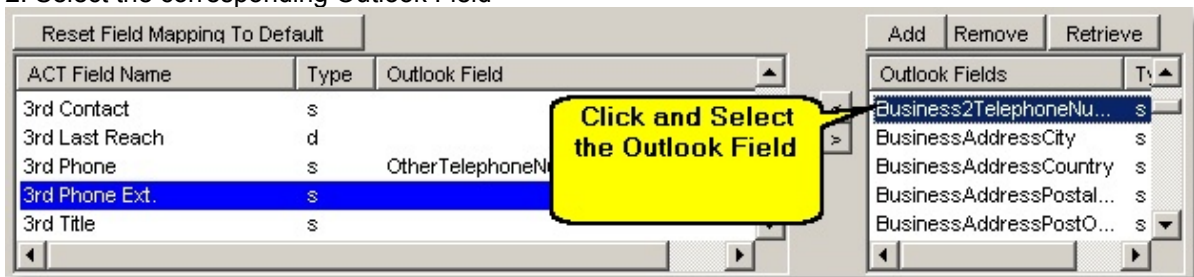
#### To map an Outlook field to an ACT! field

1. Select the ACT! field you want to map to.

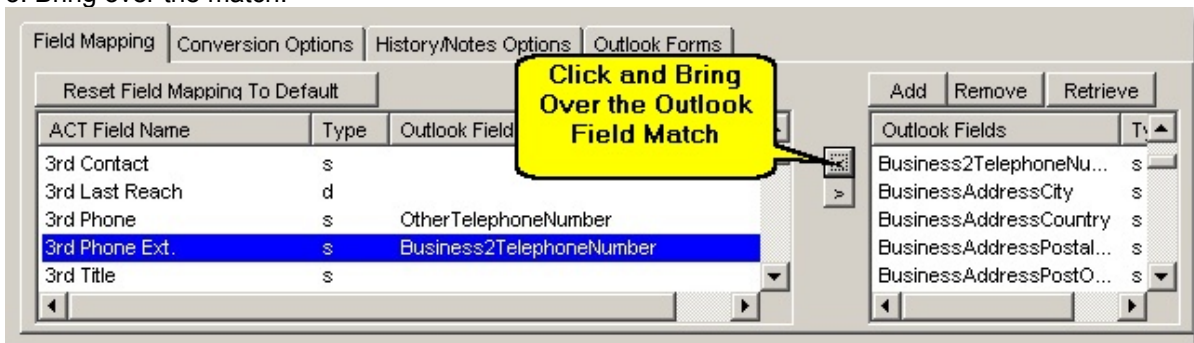
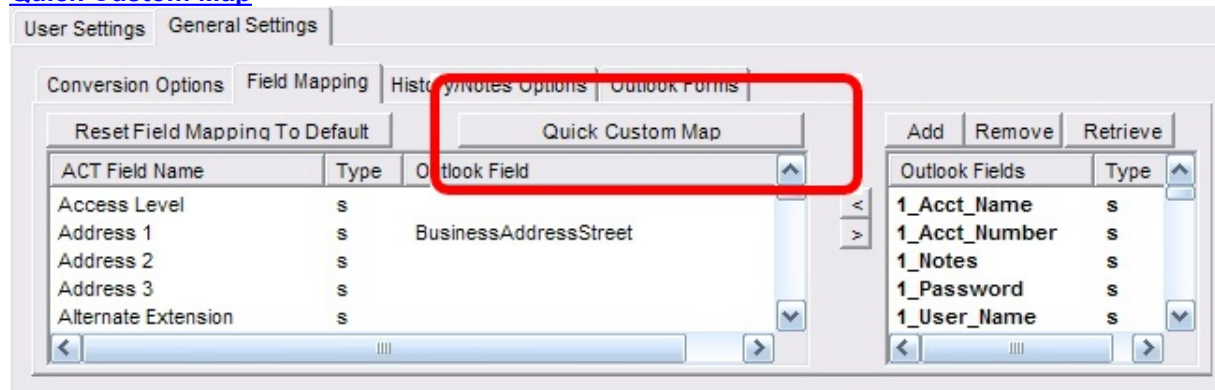




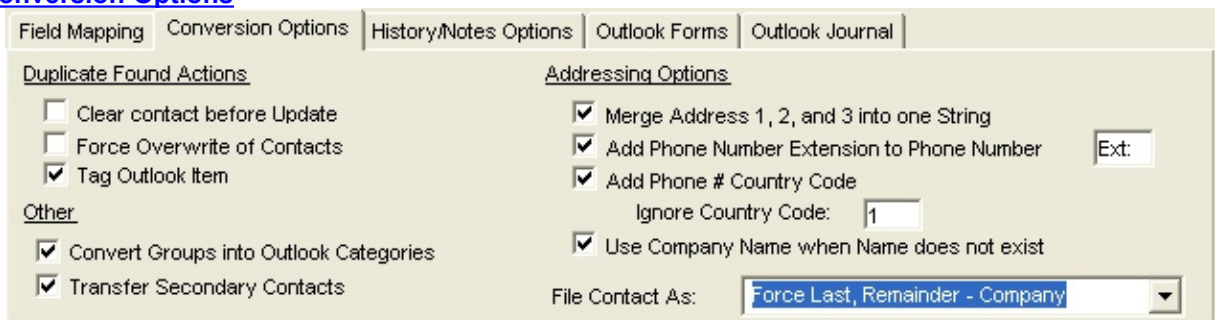
## 2. Select the corresponding Outlook Field



## 3. Bring over the match.

[Quick Custom Map](#)

The Quick Custom Map is a very easy and effective way of bringing over large number of ACT! Custom Fields as Outlook custom fields. It takes the ACT! field and transposes the custom fields to Outlook-Friendly form.

[Conversion Options](#)

### **Duplicate Found Actions**

**Clear Duplicate Before Update.** When this flag is set, all the data in the contact is cleared before adding the information to the Outlook Contact.

**Force Overwrite of Contacts.** When set, all the contacts are forcefully overwritten without regard to update dates of the contacts in ACT!.

**Tag Outlook Item.** When set, a tag is added to each item in Outlook. By default, this field is enabled so that a minimum of duplicate Outlook items are generated and so that you can move Outlook items to other folders and when you convert again, a positive match is made and no duplicates are created.

### **ACT! Groups->Categories Conversion**

**Convert Groups into Outlook Categories.** When enabled, ACT! Groups are consequently converted into Outlook Categories.

**Transfer Secondary Contacts.** When enabled, secondary ACT! contacts are converted into Outlook as User Defined Properties starting with the name Secondary# where # is the number of the first contact.

### **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.
- **Add Phone # Country Code.** By default, the country code is not added to the Outlook phone number. However, if you so wish, enable this option and the country code in the format of +CC (like +44) is added to each Outlook phone number that has a country code.  
**Ignore Country Code:** If a number exists in this box, country codes that match that number are not brought over to Outlook. This is usefully since most of the time you want to only bring over "foreign" country codes but not your own.
- **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 2006 Edition 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.
- **File Contact As:** This is the string that will be used to file the contact as in Outlook.

One interesting part in the File Contact As selection is that the contact can be saved into Outlook using the ACT! Firstname and Lastname parameters. However, in our experience, the stored ACT! Firstname and Lastname are 90% incorrect on an ACT! database. Hence, the option of Force\_Last will take the last string of the name and then it will use the remainder of the contact name as the first name. The contacts can therefore be Filed As using the formats below:

Company  
 (Company) Last, First  
 First Last  
 Last, First  
 Last, First (Company)  
 Last, First - Company  
 Last, First Company



Force\_Last, Remainder (Company)  
 Force\_Last, Remainder - Company  
 Force\_Last, Remainder Company

### History/Notes Options

The History/Notes options provides the user with the capability to convert the History, Notes and Attachments that exist in ACT! over to the Outlook Contact Body Text.

**Convert Sales Opportunities:** When enabled, the contact opportunities are converted. The header is, by default, "\*\*\* SALES OPPORTUNITIES \*\*\*". This field can be changed to suit the user.

**Convert Notes:** When enabled, the notes for the contact are converted. The header is, by default, "\*\*\* NOTES \*\*\*". This field can be changed to suit the user.

**Convert History:** When enabled, history items are converted. The header is, by default, "\*\*\* HISTORY \*\*\*". This field can be changed to suit the user.

**Max History:** This number controls the Maximum number of history items to be converted.

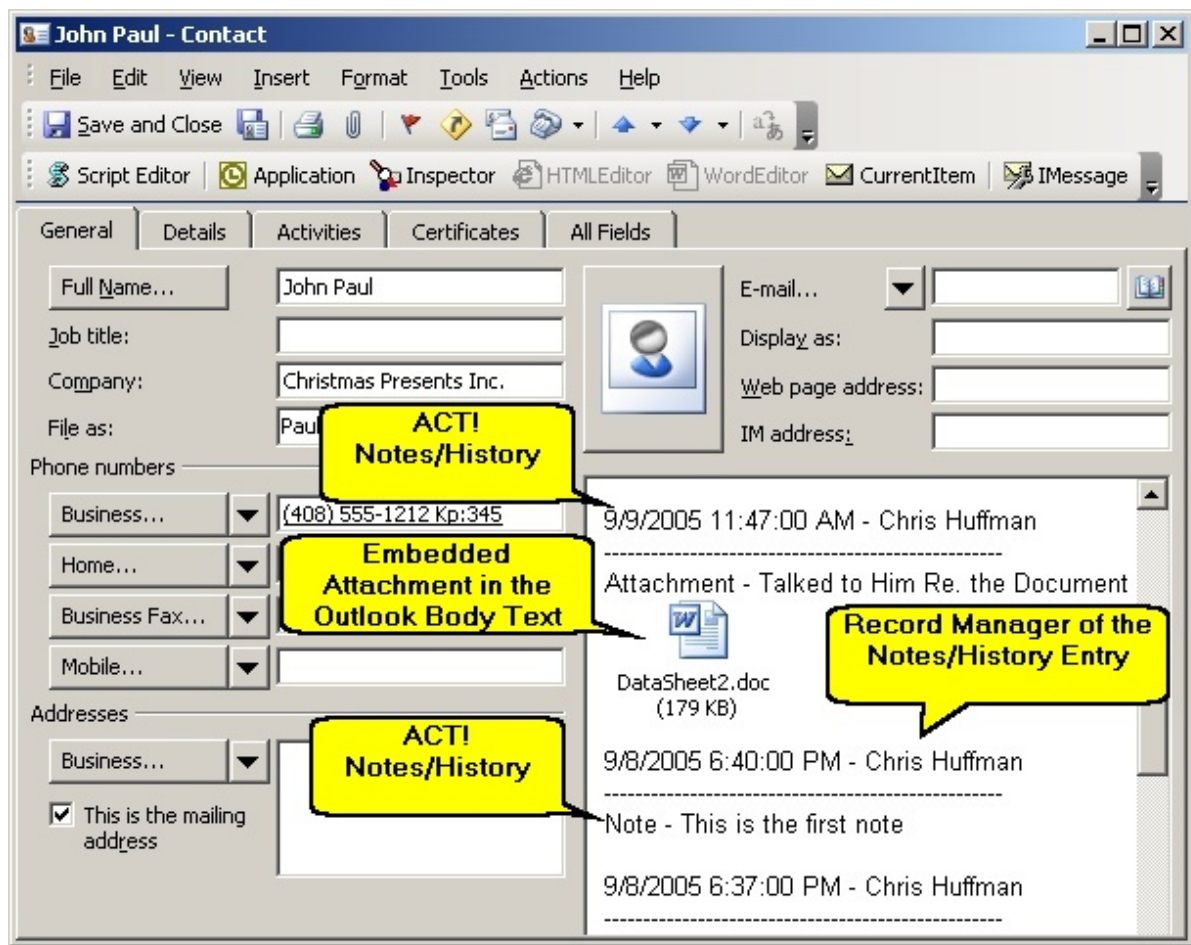
**Convert Attachments:** When enabled, the attachments in the history and notes items are inserted into the contact's body text.

**Ignore Attachments with the Following Extensions:** Here you can instruct the software to ignore any attachment with the extensions provided. By default we provide the IMA and DET attachments because these are incompatible ACT! attachments and can only be viewed within ACT!.

**Ignore Records With Attachments:** When enabled, all records with attachments are ignored.

**Add Owner Name:** When enabled, the owner's name of the record being converted is added to the history item.

When Convert History/Notes is enabled, the items enabled on the Notes/History To Convert are concatenated and inserted into the contact body text as listed below.



### Notes/History Options

**Max Number of History/Notes.** This is the maximum number of ACT! history/notes to be brought over. Default is 100.

**Add Notes Owner.** When enabled, the Notes/History record manager's name is entered at the end of the date the history was entered into ACT!.

### Outlook Forms

Outlook provides the capability to assign a form to a specific contact, calendar and task entry. If you are using a form that is specific to your application, enter it here.

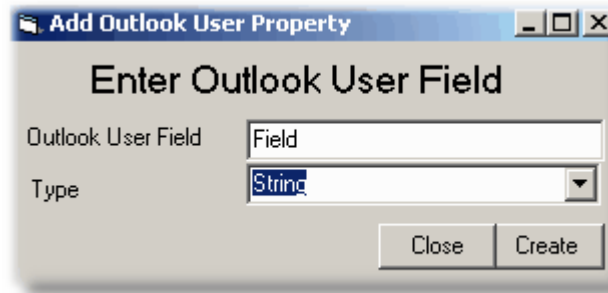
Field Mapping	Conversion Options	History/Notes Options	Outlook Forms	Outlook Journal
Contact			Default	
Calendar			Default	
Tasks			Default	

## 4.2.1 Adding Outlook User Defined Fields

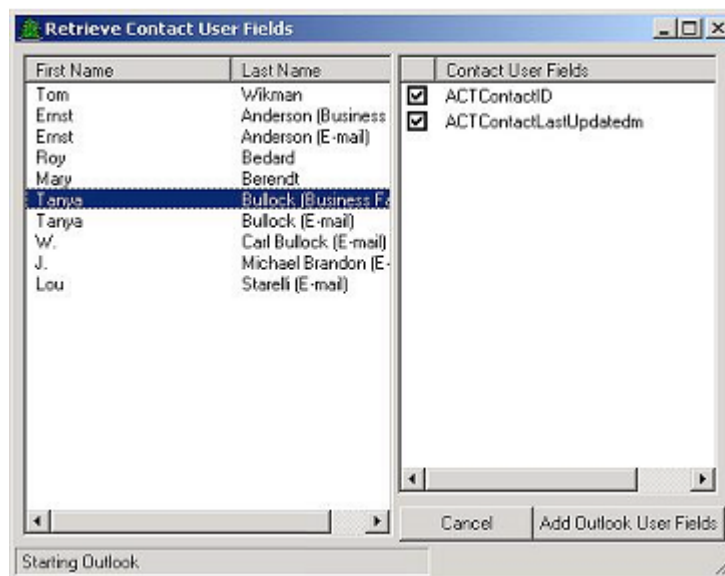
### Setting up the Outlook User Defined Fields

**All Outlook User Defined Fields are displayed in Bold in the User defined field list.** ACT-To-Outlook Professional 2006 Edition 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.

#### 4.2.2 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

### 4.2.3 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.

#### 4.2.4 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 2006 Edition. 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 2006 Edition provides users with the option to merge address and phone number fields to be Outlook Friendly.

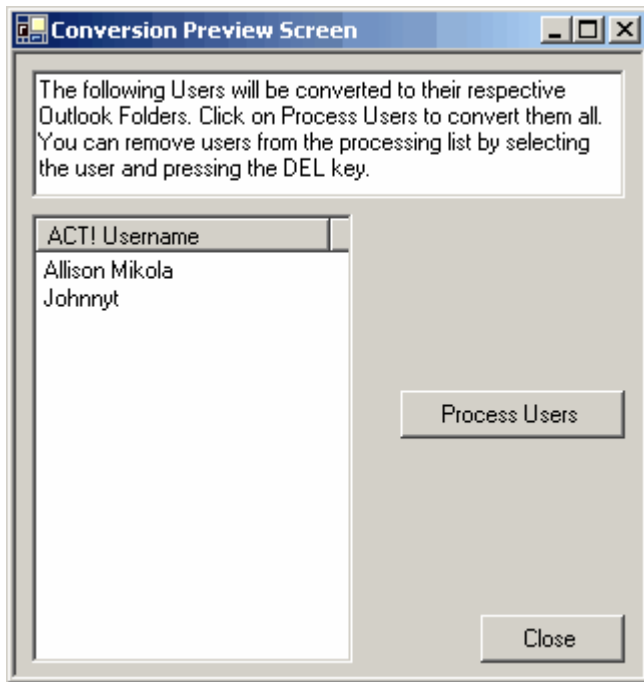
<u>ACT! Representation</u>		<u>Outlook Representation</u>	
Field	Example	Field	Example
<u>Contact's Street Address</u>		<u>Outlook Street Address</u>	
Address 1	1892 Washington	BusinessAddressStreet	1892 Washington Apartment A Suite 202
Address 2	Apartment A		
Address 3	Suite 202		
<u>Contact's Home 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.			

### 4.2.5 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:

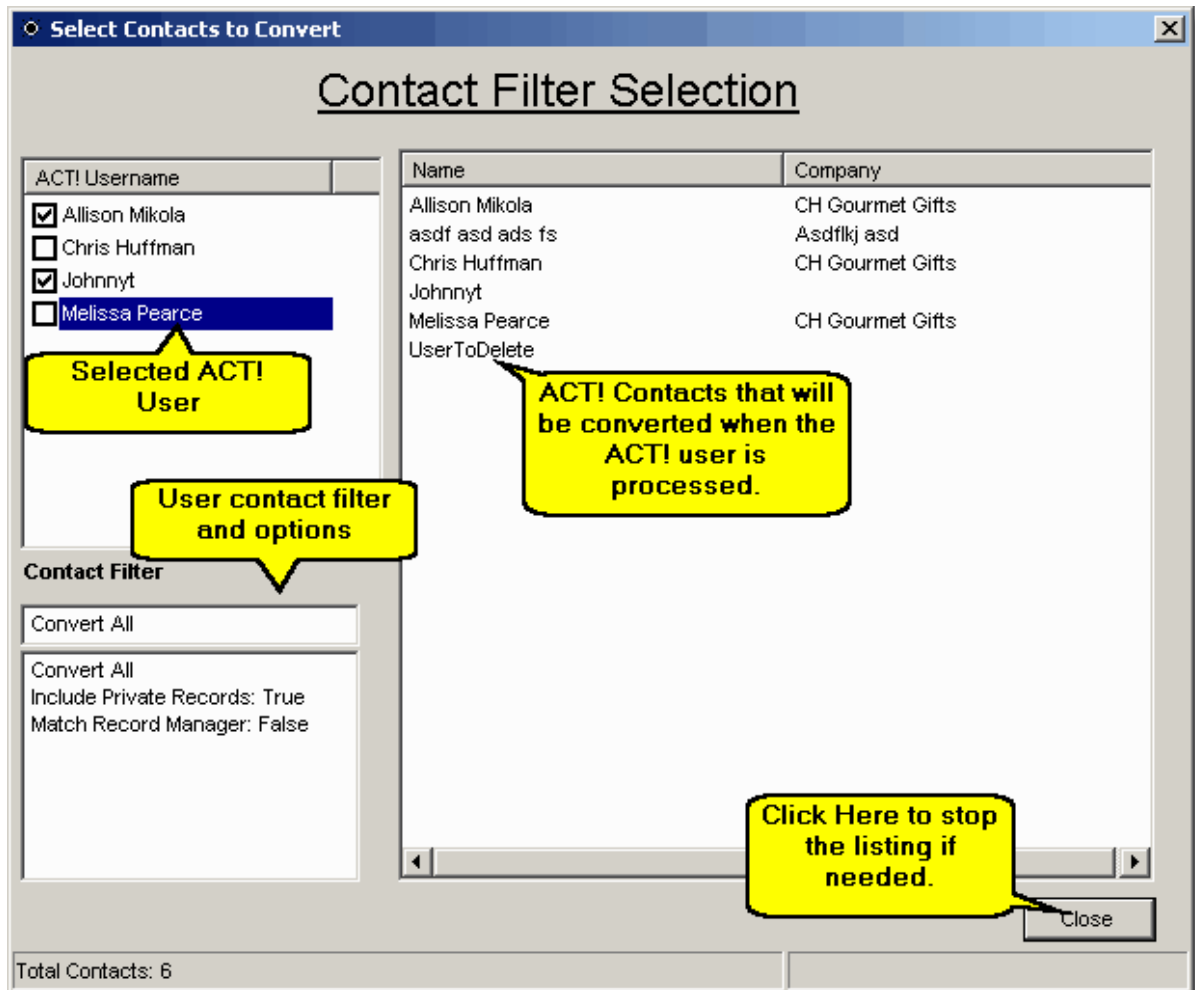
- The ACT! default (or Primary) email address gets converted to Email1Address

## 4.3 Conversion Preview



The contact preview screen comes up when you press the Convert button. The ACT! users listed on the ACT! Username list are the users that will be processed for the database conversion. These are users that have the check mark in the main screen. Pressing the Process Users will start the conversion of the contacts from ACT! to Outlook.

## 4.4 Contact Selection Viewing



The contact selection viewing form comes up when you press the View button on the main screen. It's objective is to provide a listing of the contacts that will be selected for conversion once the Process Users button in the preview screen is pressed.

### Dealing with Large Databases

The objective of the Contact Selection Viewing is to provide users with a list of the contacts that will be converted for a particular user. If you have Convert All enabled, all the contacts will be listed on the database. However, if you have over 20000 contacts in the database, the listing will take awhile. You can press on the Stop button to stop the listing and still see the front end of the contact list.

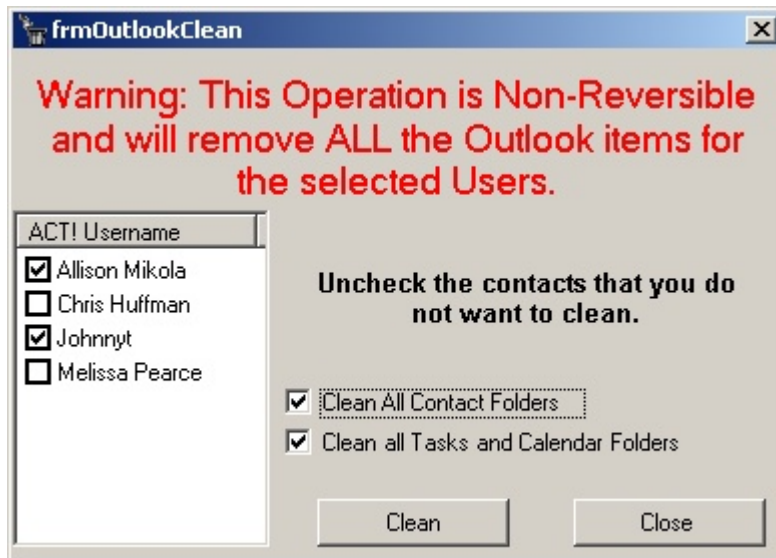
### Contact List with no contact name and company name

In many ACT! databases, there are a lot of empty records and these records will display at the beginning of the list. Scroll down the list and you'll see the real contact records.

## 4.5 Tools Menu

- Outlook Clean - Quick and easy way to remove items from the Outlook folders.
- Administration - Change current admin settings.
- Create Outlook Export Tree

### 4.5.1 Outlook Clean

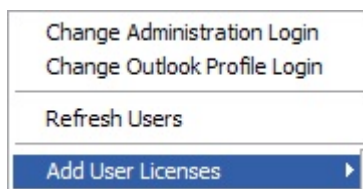


The Outlook Clean option in the Tools Menu will **DELETE** all items from the folders that have been setup for the individual users. Only the users that are check mark'ed are considered for cleaning.

### 4.5.2 Administration

#### [The Administration Menu](#)

When the administration menu is clicked, you get the options below:



#### [Change Administration Login](#)

This from is used to change the administration login details. Remember, whatever username you change the login to be, that username has to have privilege to access the details required by the software. It is recommended that you use a login profile with administration privileges.



### Change Outlook Profile Login

This screen enabled the user to change the profile settings of the main login.

To properly test the profile login, make sure that Outlook is closed and that there is no Outlook process running in the background.

### Refresh Users

If you add/remove users from the ACT! database, the refresh users option goes through the ACT! database and refreshes all the users that exist in it. If the user already exists in ACT-To-Outlook Professional, nothing is done. However, if it is a new user, it is added to the user list.

### Add User Licenses

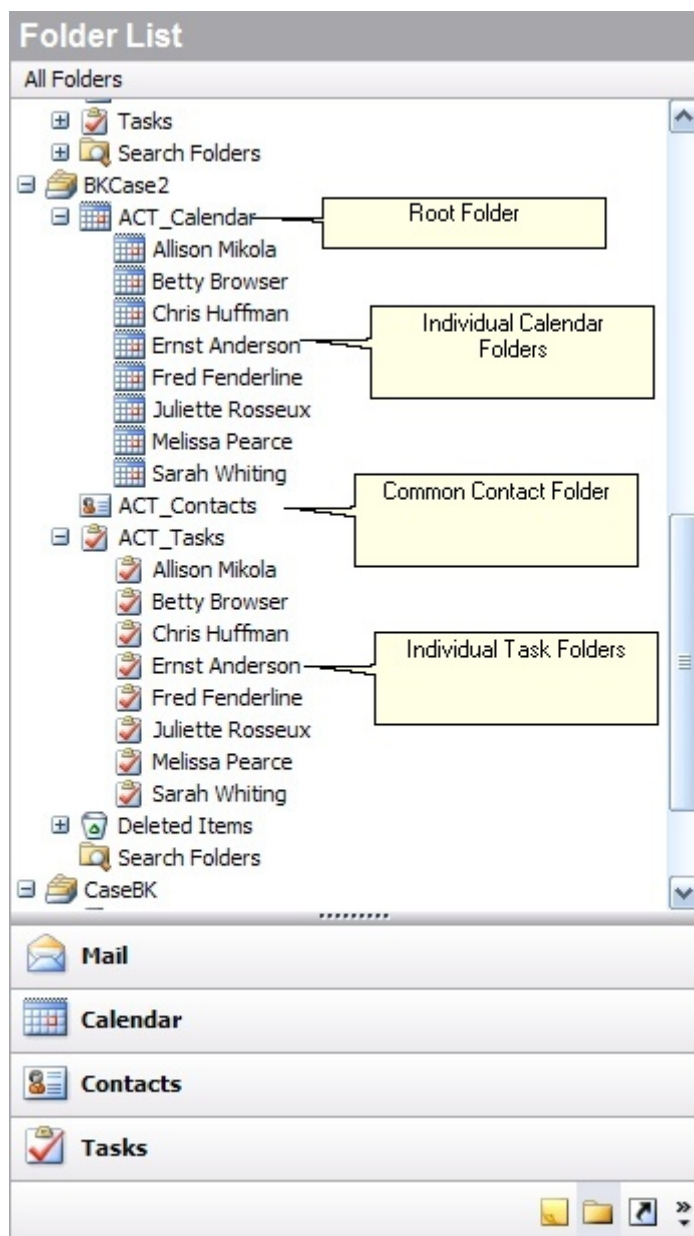
This option allows you to add user licenses to your current set of users.

## 4.5.3 Create Outlook Export Tree

This tool provides for a quick way to setup a whole Outlook Folder tree with a shared contact folder and each user with his/hers individual Calendar and Tasks folder. In the example above, using the demo database provided with ACT!, the corresponding Outlook tree is shown below. What would otherwise take hours to setup, only takes a matter of seconds.

If you don't like any of the names provided, you can simply click twice on the name and then edit it to your desired nomenclature.





# **ACT-To-Outlook Professional 2006 Edition**

Accurately Transfer ACT! 2005/2006 Databases into Outlook

## **Part**

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**V**

## 5 Getting Started

### 5.1 Step 0 - Activating your product

When you download any of ACT-To-Outlook.com's products, you receive our demo version of the product. In order to enable this demo, you must activate it.

#### The License Number

When you purchase, you receive an unique license number from us in the form of a 17-digit number, for example: 49015-2822-1273-1966 . This number has to be entered into the Registration->License Activation menu in order for the product to operate unencumbered.

#### Registration->License Activation



The License Activation Option instructs the software to activate using the internet. This option instructs it to authenticate with our license server and then activate the product. When selected, you get the screen below:

A screenshot of a dialog box titled 'License Activation' with a subtitle 'Enter License Key'. It contains four input fields: 'Name' with the placeholder 'Enter name', 'Company' with 'PersonalCRM', 'Email Address' with 'personalcrm@personalcrm.com', and 'License' with '1234-1223-1234-1234'. At the bottom right are 'Cancel' and 'Register' buttons.

When the register button is pressed, the software will activate. If you are running a firewall or if there are any connectivity issues that prevent the software from activating, then use the Manual License Activation

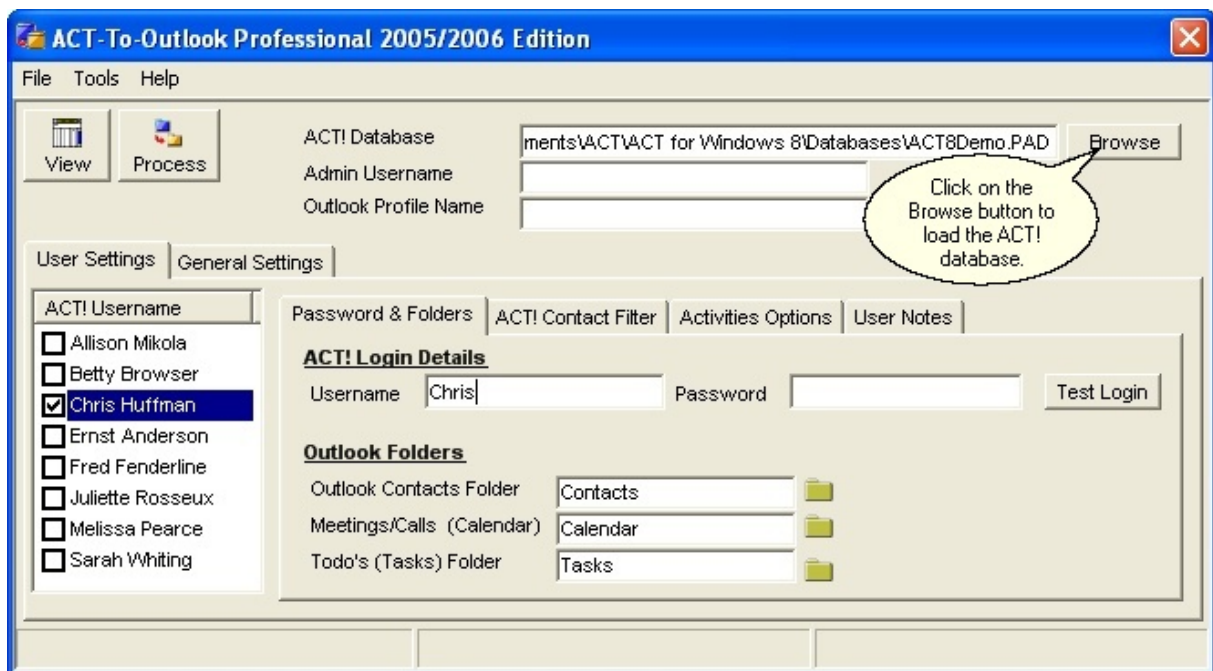
#### Registration->Manual License Activation



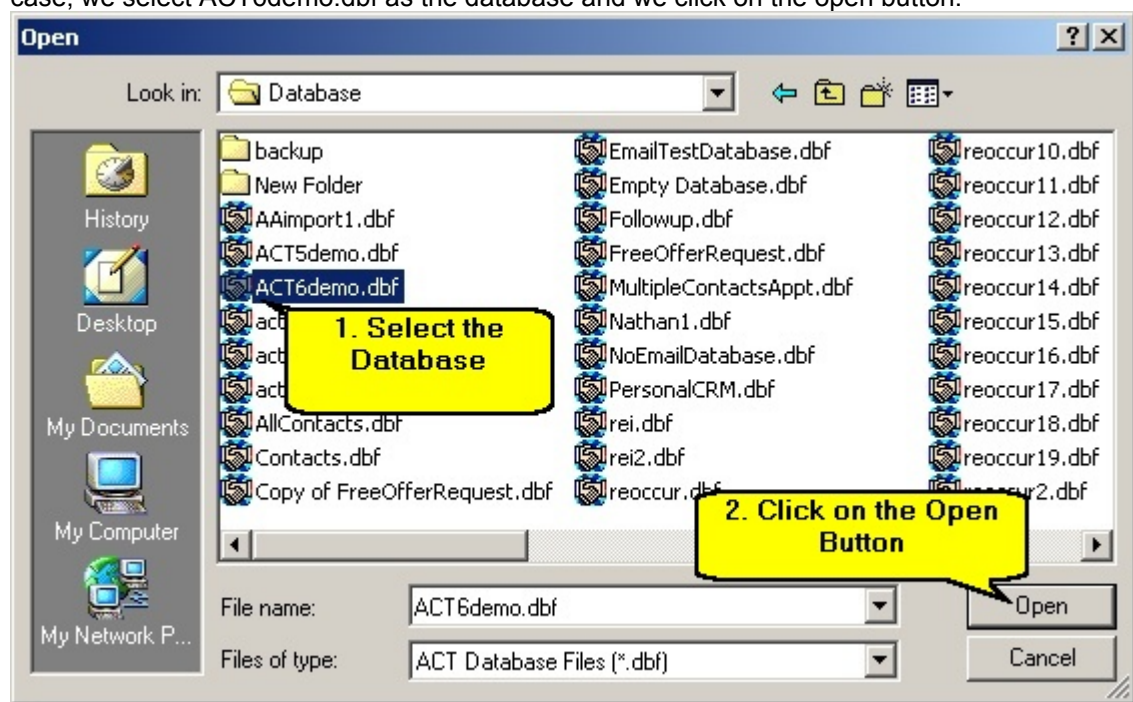
The Manual License Activation should be used when the automated, internet-based license activation fails. The user is taken to a web page at ACT-To-Outlook.com and then an email is sent to the user with instructions on how to register the software. For instructions on activating the software using the email we send, [click here](#).

### 5.2 Step 1 - Opening the ACT! database

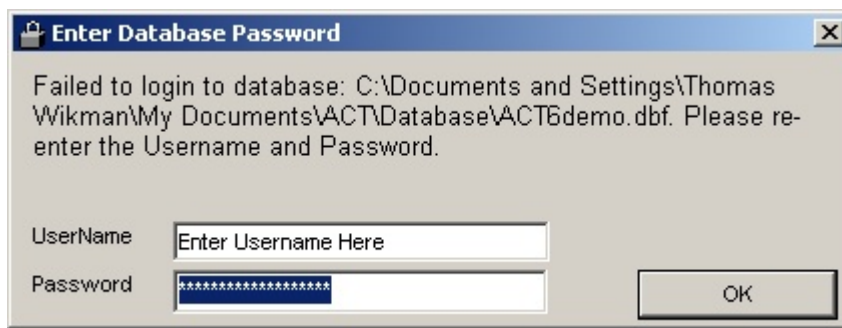
When the software is first run, you get a screen with Empty fields as shown below.



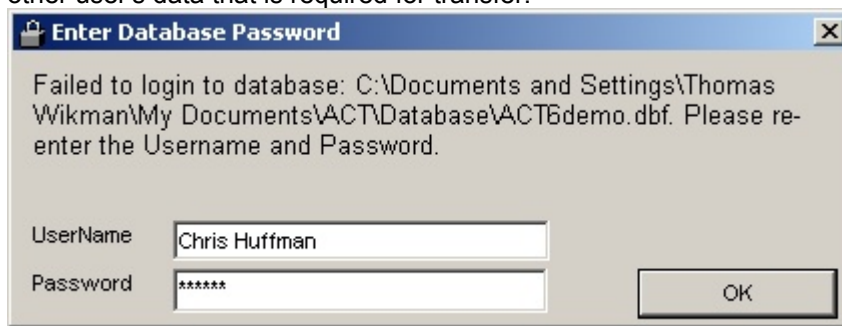
When you click on the browse button, you are provided with the list of available databases. In this case, we select ACT6demo.dbf as the database and we click on the open button.



If your database is password protected and/or you have multiple users defined in the database, the username and password screen is presented.

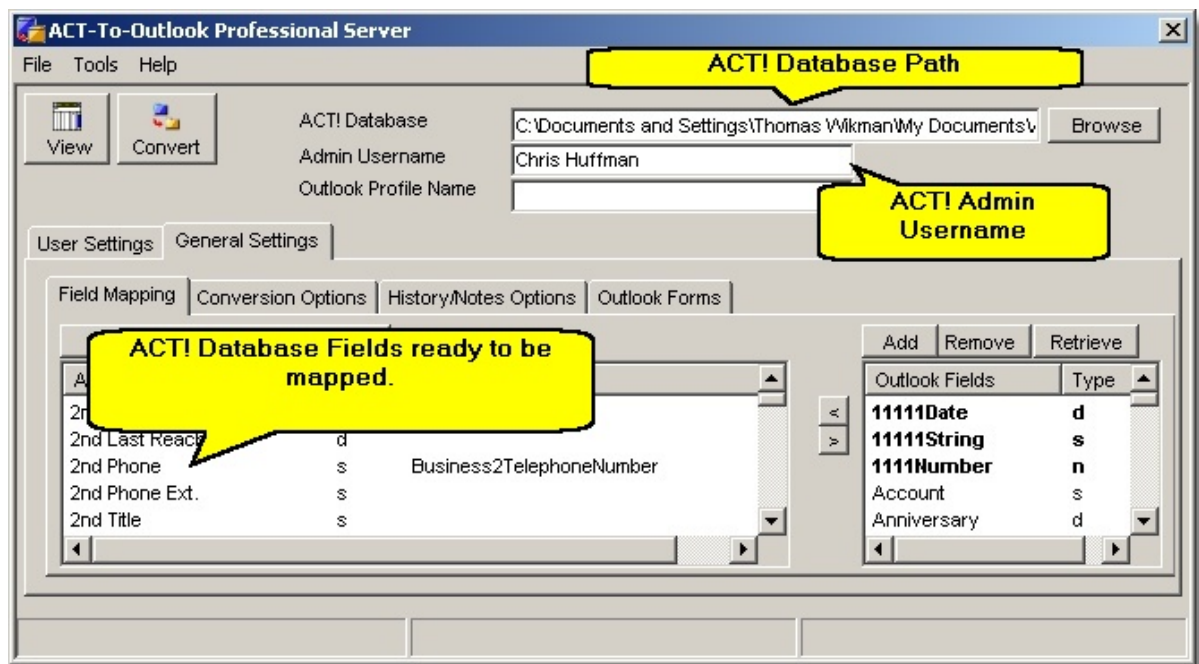


Here, you must enter the username and password for a user that has Administration privileges on the database. If the user does not have Administration privileges, you may not be able to access other user's data that is required for transfer.



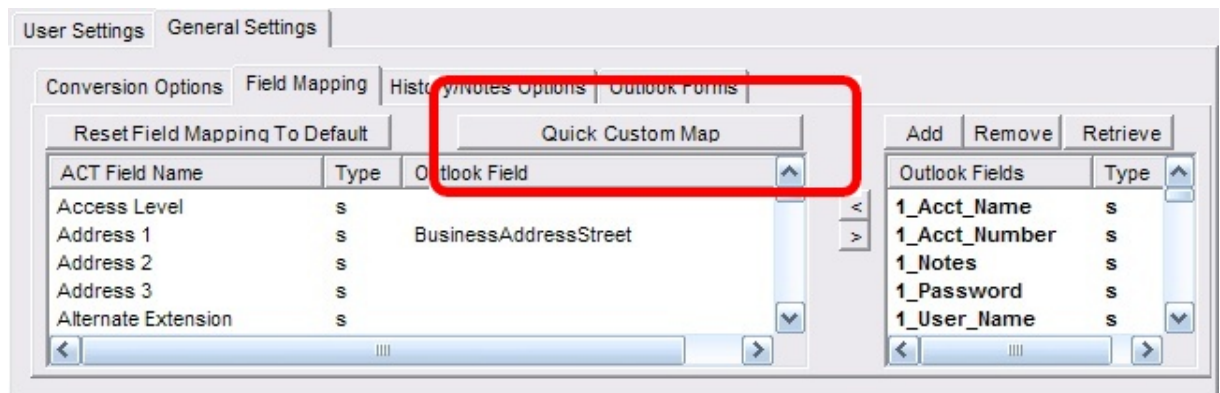
When you have successfully logged in to the database the following happens:

1. The database gets listed on the ACT! Database Field
2. The user you used (in our case, Chris Huffman) is then declared administrator. If you made a mistake and wish to change the administrator, go to the Tools->Administration menu. Click here if you wish to see how to change the administrator login.
3. All users defined in the database are listed on the ACT! Username List.
4. All fields in the ACT! Database are listed in the Field Mapping tab.



### Quick Custom Field Mapping

You can quickly create a custom field map by pressing the Quick Custom Field button on the field mapping Tab.

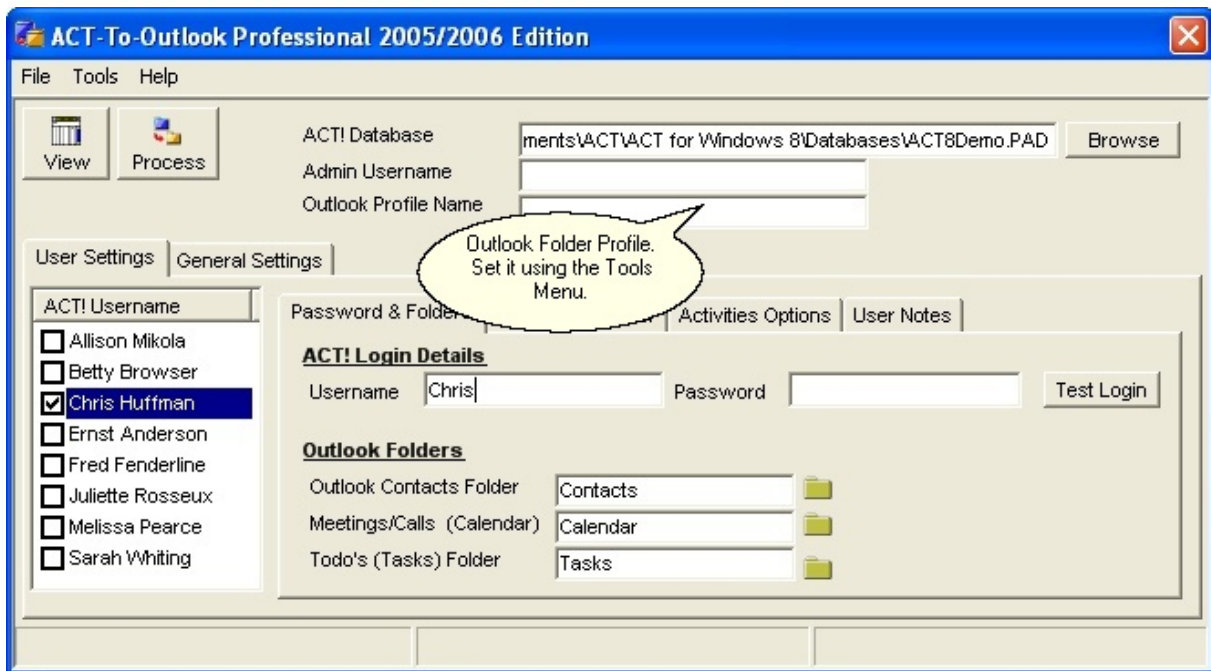


## 5.3 Step 2 - Set the Outlook Profile Name

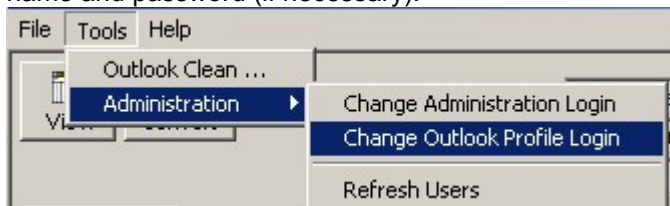
If you use multiple Outlook profiles, you can only change them in the Administration option accessible from the Tools menu.

It is important to set the Outlook profile if you intend to run the software without Outlook being open.



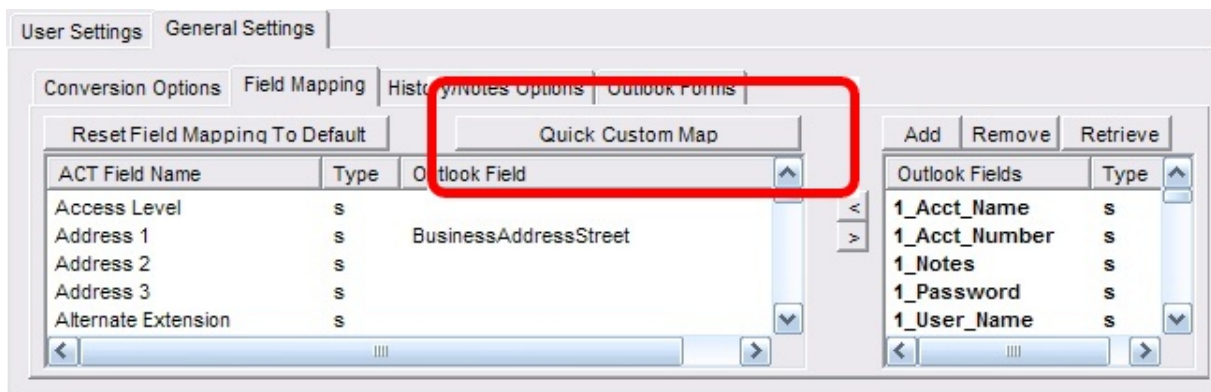


Select the Tools->Administration->Change Outlook Profile Login in order to set the Outlook profile name and password (if necessary).

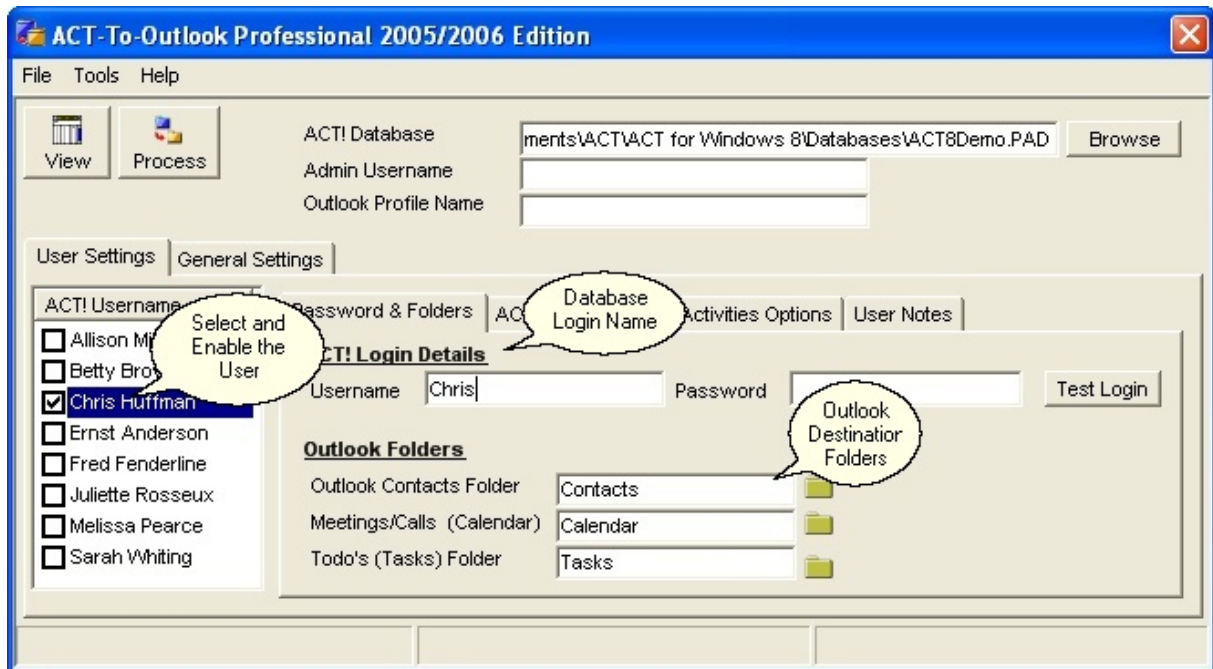


## 5.4 Step 3 - Set the General Settings

Most of the defaults in the general settings work when you first convert the database. However, if you wish to re-map fields from ACT! to Outlook and so on, this is where it is done before the conversion takes place.



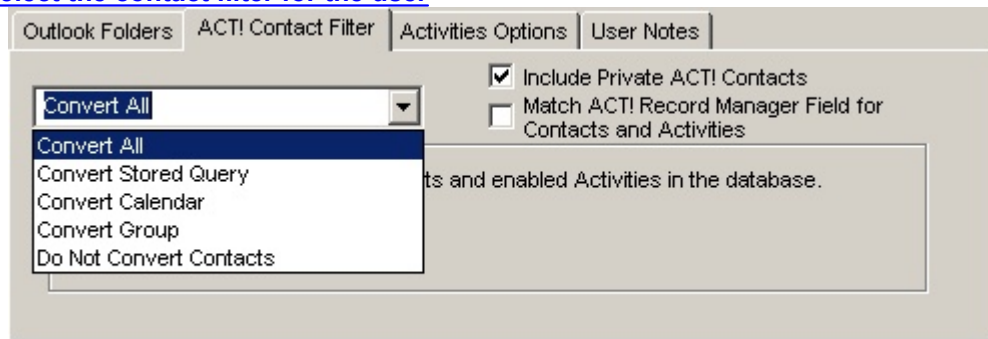
## 5.5 Step 4 - Enable and Set the Individual ACT! Users



This is where you enable/disable which users get converted into the corresponding Outlook Folders. A few things:

- Even if a user is excluded from the conversion, the History/Notes items owned by that user are still converted to the contact body text with the corresponding user ownership.
- For users that intend to share a contact folder, all the Outlook Contact Folders must be the same. You time purposes, you should only convert 1 folder and then setup the contact filters for the other users not to convert.
- If you are converting more than 16K contacts into Outlook 2000 and 2002, the conversion will fail due to folder limitation of 16K. That is NOT the case with Outlook 2003.

### Select the contact filter for the user



Each user has 5 primary filtering options to convert contacts:

1. **Convert All:** All the contacts are converted
2. **Convert Calendar:** Only contacts that have calendar items (calls, meetings or todo's) that are not cleared are selected.
3. **Convert Group:** Convert only a selected group and/or subgroups.
4. **Do Not Convert Contacts:** No contacts are converted for this user.



For more information on Contact Conversion Filters, click [here](#).

**Include Private ACT! Contacts.** When this option is set, private contacts are included in the conversion. If unset, no contacts flagged as private are converted to the Outlook Folder.

**Match ACT! Record Manager Field for Contacts and Activities.** Each ACT! Contact and Activity has a Record Manager Field. When set, only records that have a record manager ID equal to the ACT! User being converted are brought over.

### Activities Options

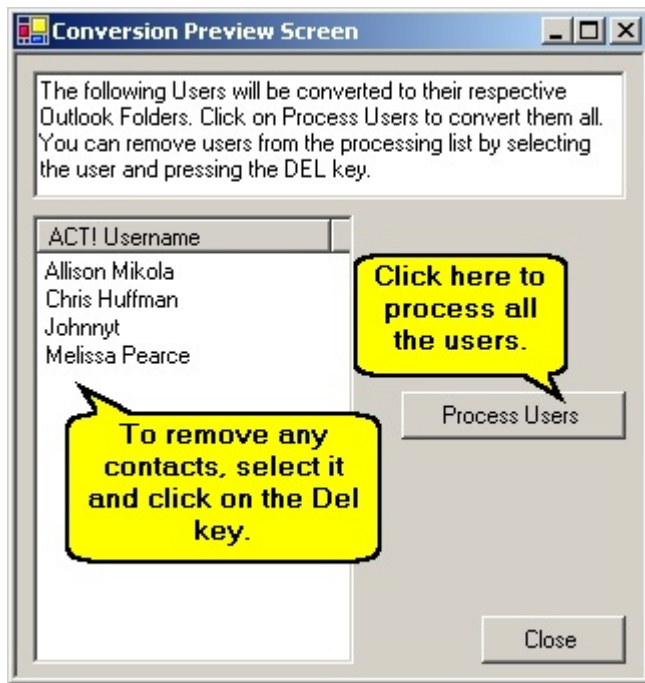
The activities options, by default, come almost all enabled as listed below:

The company addition to the subject line may be added is required.

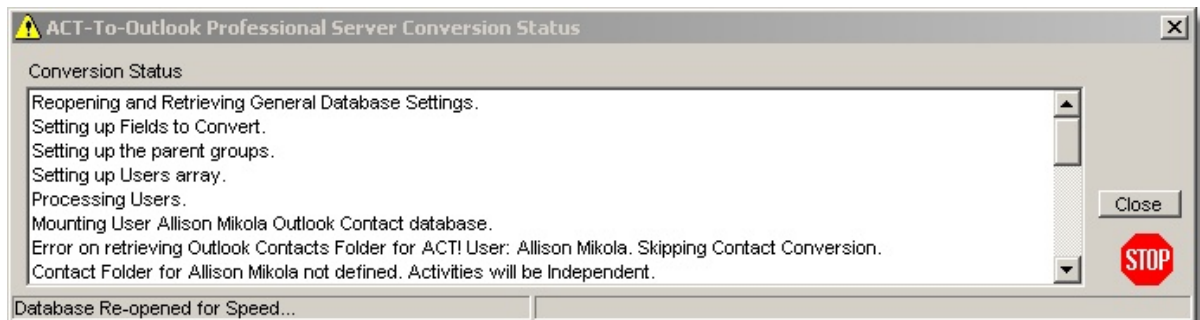
## 5.6 Step 5 - Running the Conversion

To run the Conversion, click on the convert button.

When this button is clicked, you get a list of the enabled contacts that you wish to convert:



Click on process Users and the conversion status screen pops up.



The users will all be converted as long as the STOP icon is not pressed. When the conversion is done, the stop icon disappears and the conversion is done.

# **ACT-To-Outlook Professional 2006 Edition**

Accurately Transfer ACT! 2005/2006 Databases into Outlook

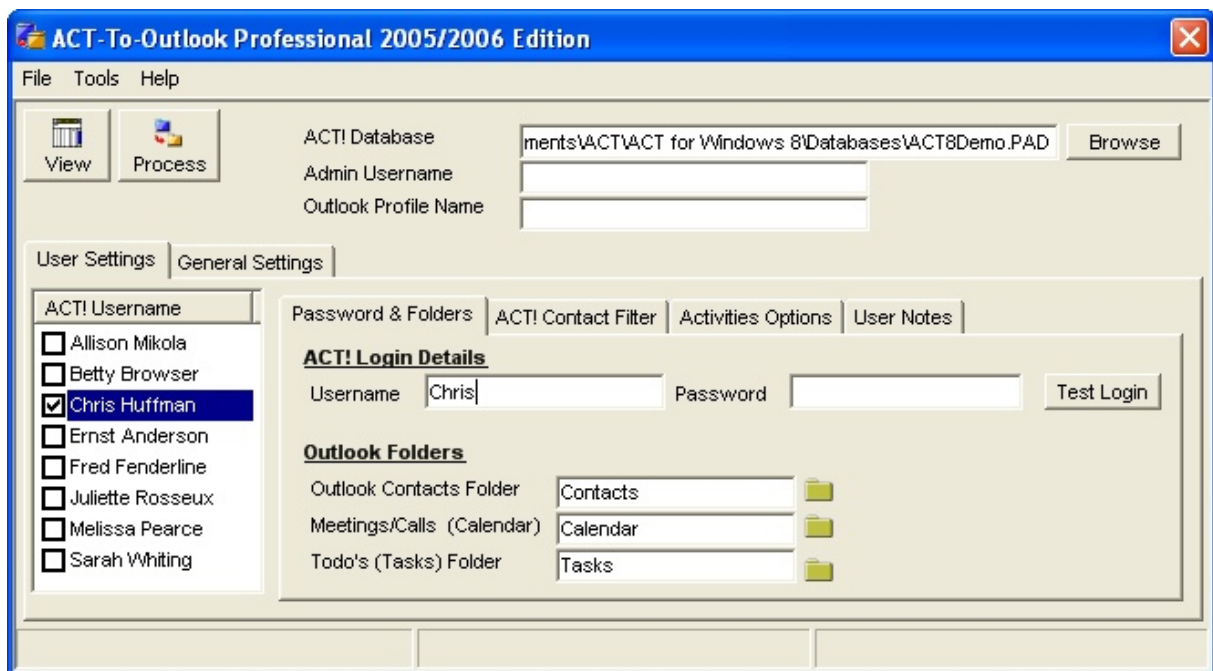
## **Part**

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**VI**

## 6 Examples

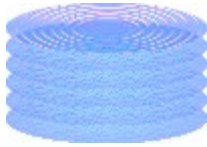


When you open ACT-To-Outlook Professional, you get the screen shown above. The ACT! users defined in the ACT! database are listed on the left column, the ACT! Username column. Each user listed in the user settings tab has its own, customizable set of settings.

### 6.1 Example: Each User with their own set of folders

In this case, you want to have a fully independent set of contacts for each user. In this case, ALL contacts are transferred over.

### ACT! Multi-User Database



User John: →

User Paul: →

User LastUser: →

### Outlook Folders

John's Outlook Folders:

- Contact Folder
- Calendar Folder
- Tasks Folder

Paul's Outlook Folders:

- Contact Folder
- Calendar Folder
- Tasks Folder

...

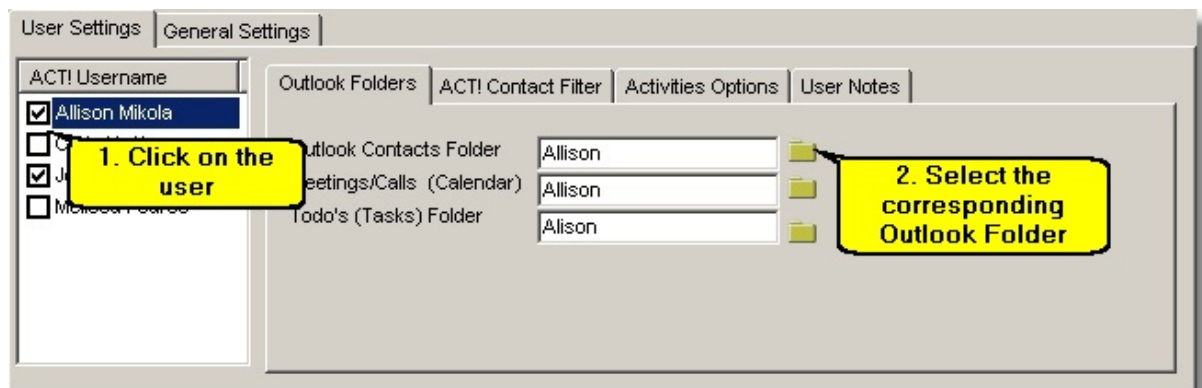
LastUser's Outlook Folders:

- Contact Folder
- Calendar Folder
- Tasks Folder

Each user has it's own set of Outlook Folders that will contain ALL the contacts in the database.

Step 1: Create a contact, calendar and tasks folder in Outlook for each user defined in ACT!

Step 2: Click on the user in ACT! and then select their appropriate folders:



Step 3: Select the contact filter for this user.



Step 4: Select the Activities to convert from the Activities Options

After the activities options are selected, press convert and all the enabled (checked) contacts are selected for processing and processed.

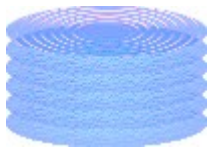
#### Modification 1

If you want only the contacts that belong to the user (record manager is the same as the user), check the *Match ACT! Record Manager Field for Contacts and Activities* and only those items will be transferred over.

## 6.2 Example: Users share a common Outlook contact folder.

In this example, all users share 1 common Outlook folder (in our case it is John's) but have their own independent Calendar and Tasks Outlook folders.

#### ACT! Multi-User Database



User Johnnyt:



User Allison:



User Chris:



#### Outlook Folders

Johnnyt's Outlook Folders:

**johnnyt Contact Folder**

Calendar Folder

Tasks Folder

Paul's Outlook Folders:

**johnnyt Contact Folder**

Paul's Calendar Folder

Folder

Paul's Tasks Folder

.

.

LastUser's Outlook Folders:

**johnnyt Contact Folder**

LastUser's Calendar Folder

LastUser's Tasks Folder

Each user has it's own set of Outlook Folders that will contain ALL the contacts in the database.

Step 1: Click on the primary user/contact (in our case, Johnnyt) in ACT! and then select their appropriate folders:

The screenshot shows the 'ACT! Username' tab with a list of users: Allison Mikola, Chris Huffman, Johnnyt, and Melissa Pearl. Johnnyt is selected. A yellow callout bubble points to Johnnyt with the text 'Select primary contact'. To the right, the 'Outlook Folders' tab is active, showing three input fields: 'Outlook Contacts Folder' (Johnnyt), 'Meetings/Calls (Calendar)' (Johnnyt), and '(Tasks) Folder' (Johnnyt). A yellow callout bubble points to these fields with the text 'Select primary contact's Outlook folder'.

Step 2: Select the contact filter for this user.

The screenshot shows the 'ACT! Contact Filter' tab. A dropdown menu is set to 'Convert All'. A yellow callout bubble points to the dropdown with the text 'Set the contact filter to Convert ALL'. Below the dropdown, a message box states: 'Convert All will convert all contacts and activities in the database.' There are also checkboxes for 'Include Private ACT! Contacts' (checked) and 'Match ACT! Record Manager Field for Contacts and Activities' (unchecked).

Step 3: Set all the Activities Options.

Step 4: Setup the other contacts to point to the primary contact's Outlook folder: Make sure that you select the Calendar and Tasks folder to process.

The screenshot shows the 'ACT! Username' tab with Allison Mikola selected. A yellow callout bubble points to Allison Mikola with the text 'Select the Contact'. To the right, the 'Outlook Folders' tab is active, showing three input fields: 'Outlook Contacts Folder' (Johnnyt), 'Meetings/Calls (Calendar)' (Allison), and '(Tasks) Folder' (Allison). A yellow callout bubble points to these fields with the text 'Select the Shared Outlook Contact Folder'.

Step 5: Set the contact filter processing to be "Do Not Convert Contacts". This stops the repeat processing of the same contact database.

The screenshot shows the 'ACT! Contact Filter' tab. A dropdown menu is set to 'Do Not Convert Contacts'. A yellow callout bubble points to the dropdown with the text 'Set the contact filter to Do Not Convert Contacts'. Below the dropdown, a message box states: 'No Contacts Will Be Converted for this User!'. There are also checkboxes for 'Include Private ACT! Contacts' (checked) and 'Match ACT! Record Manager Field for Contacts and Activities' (unchecked).

Step 6: Repeat step 4 and 5 until all users have been setup.

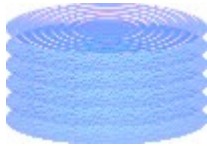
### Modification for Calendar and Tasks.

You can do the above and share both Calendar and Tasks Outlook folders.

## 6.3 Example: Transfer contacts and activities to common folders (copy)

In some instances, you may want to transfer a whole ACT!'s database contacts and all the Todo's, Calls, and Appointments to a set of common Outlook folders, as shown below: For some users, you may want to transfer Activities without necessarily create contacts in an Outlook folder. The attractiveness here is to have a common contact database in Outlook that everybody shares and everyone's activities in one common area.

### ACT! Multi-User Database



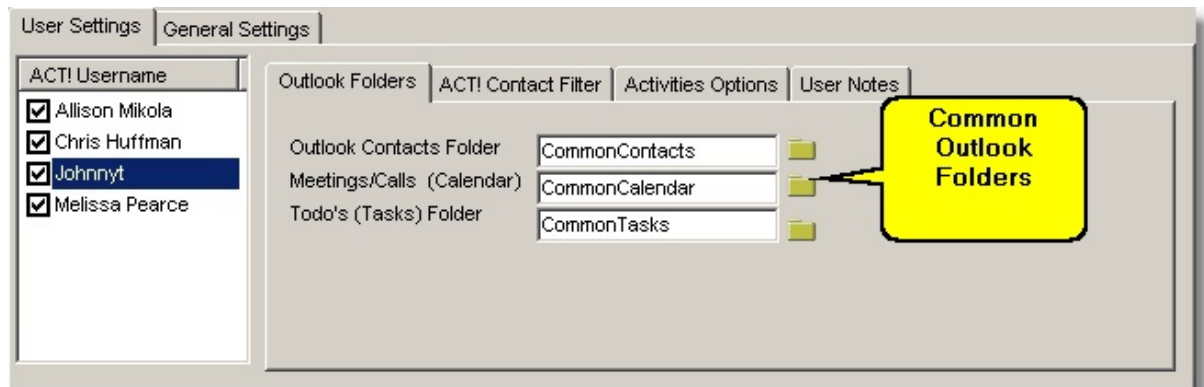
### Outlook Folders

→ User Johnnyt:  
→ User Allison:  
→ User Chris:

Common Contact Folder  
Common Calendar Folder  
Common Tasks Folder

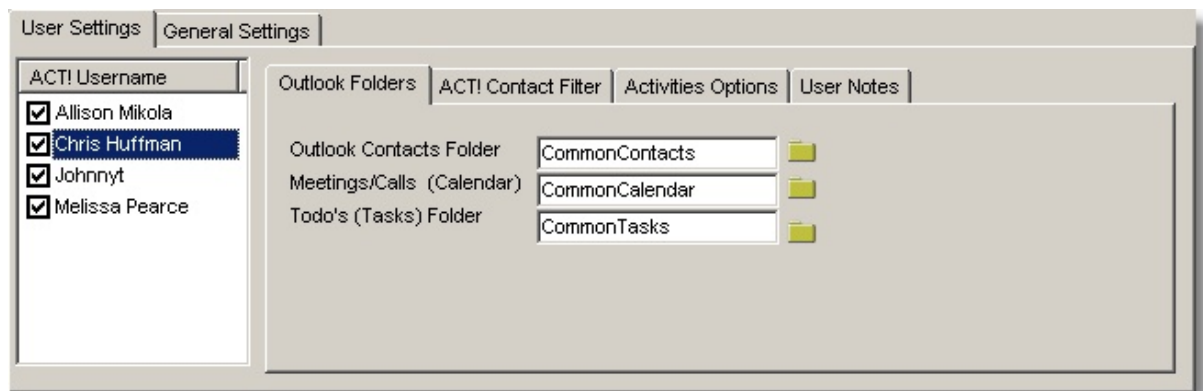
To do this, you do the following:

1. Create the common folders in Outlook
2. Link the users to the common folders

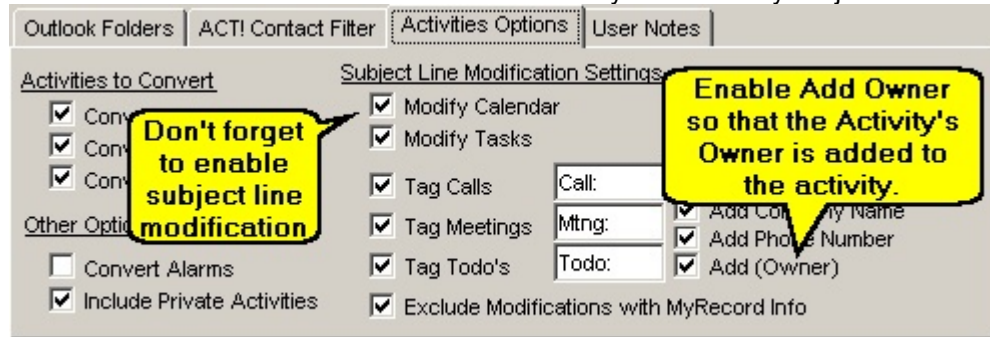


3. Do this to all the users.



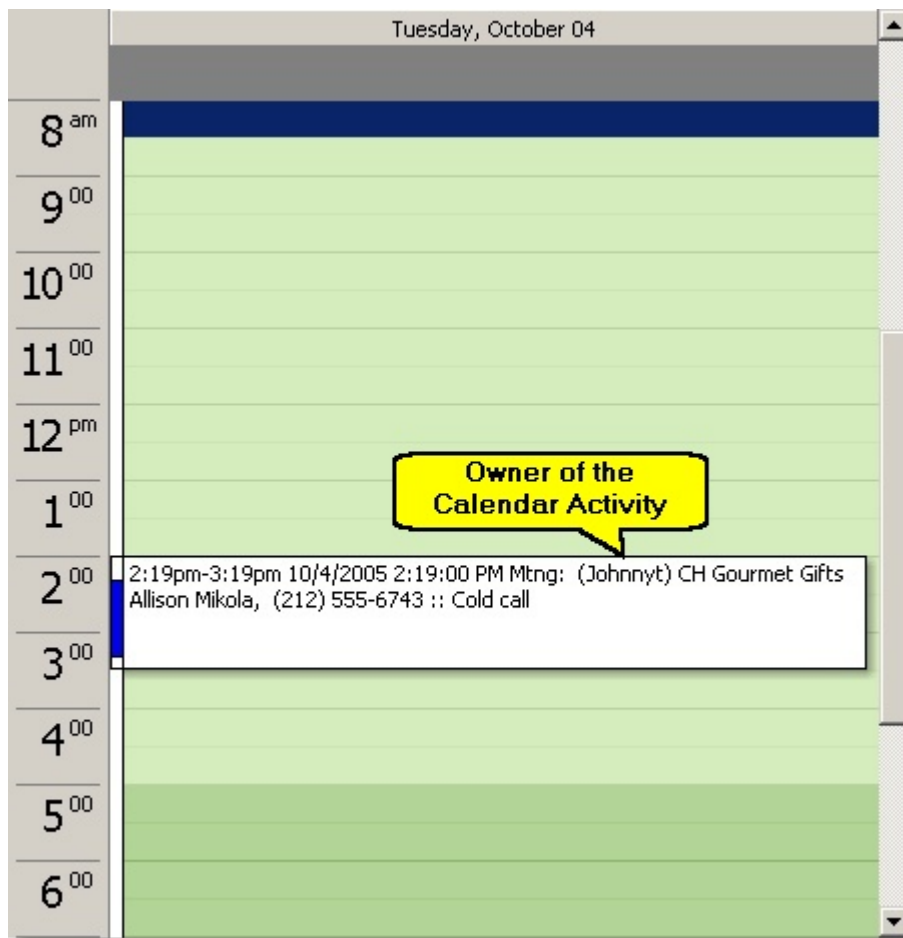


4. Once the folders have been set, set the ACT! Contact Filter for 1 user to be Convert ALL and for all the other users set it to not convert the contacts. Otherwise you'll be double converting the database's contacts to the same contact folder without any real benefit.
5. On the Activities tab, make sure that you have the Add Owner checked. This instructs the software to add the name of the owner of the activity to the activity subject line.



Results: The names of the users (owners) of the activities is listed on the actual activities and they are linked to the common contact database. See below:

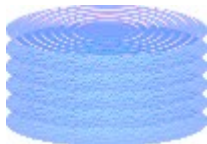
Subject		Due Date
Click here to add a new Task		
Sort by: Subject		
	10/4/2005 Todo: (Johnnyt) CH Gourmet Gifts Chris Huffman, (212) 555-6756 Kp:981 :: Se...	Tue 10/4/2005
	10/4/2005 Todo: (Johnnyt) Asdfkjasd asdf asd ads fs. (408) 555-1212 Kp:345 :: Make tra...	Tue 10/4/2005
	9/21/2005 Todo: (Johnnyt) Johnn...	Wed 9/21/2005
	10/4/2005 Todo: (Chris Huffman) UserToDelete	Tue 10/4/2005
	10/4/2005 Todo: (Chris Huffman) Johnnyt :: Make travel arrangements	Tue 10/4/2005
	2/6/2006 Todo: (Chris Huffman) :: Review Peachtree setup	Mon 2/6/2006
	10/6/2003 Todo: (Chris Huffman) :: Place quarterly order	Sun 6/29/2008
	10/22/2005 Todo: (Chris Huffman) :: Place quarterly order	Fri 10/20/2006



## 6.4 Example: Transfer activities only to common folders

In some instances, you may want to transfer a whole ACT!'s database contacts and all the Todo's, Calls, and Appointments to a set of common Outlook folders without having to transfer the contact data. These type of activities are called **Independent Activities**. Basically, these are activities that in Outlook are not related to any Outlook Contact. You can read the data in the activity but it is not connected to any Outlook contact. These folders can be assigned to each ACT! user or shared by ACT! users.

### ACT! Multi-User Database



→  
User Johnnyt:  
User Allison:  
User Chris:  
→

### Outlook Folders

Common Calendar Folder  
Common Tasks Folder

**Independent Calendar and Tasks items are created every time the software fails to connect to the Contact folder.** If the Contact folder is moved or deleted or rendered invalid, ACT-To-Outlook Professional will create independent Calendar and Tasks items. Hence, the key here is to render the contact folder empty or invalid.

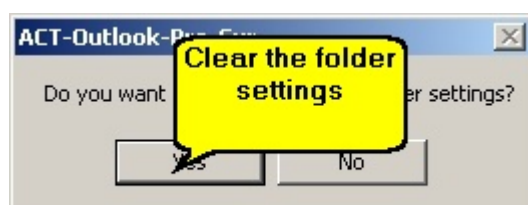
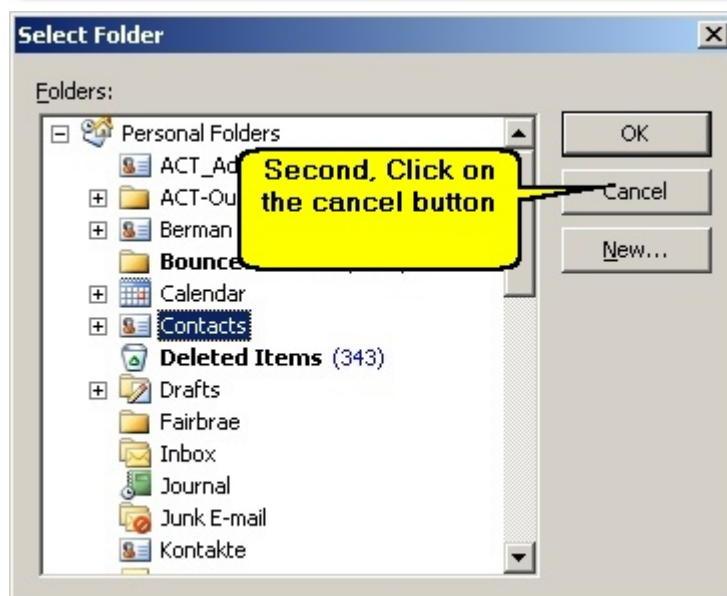
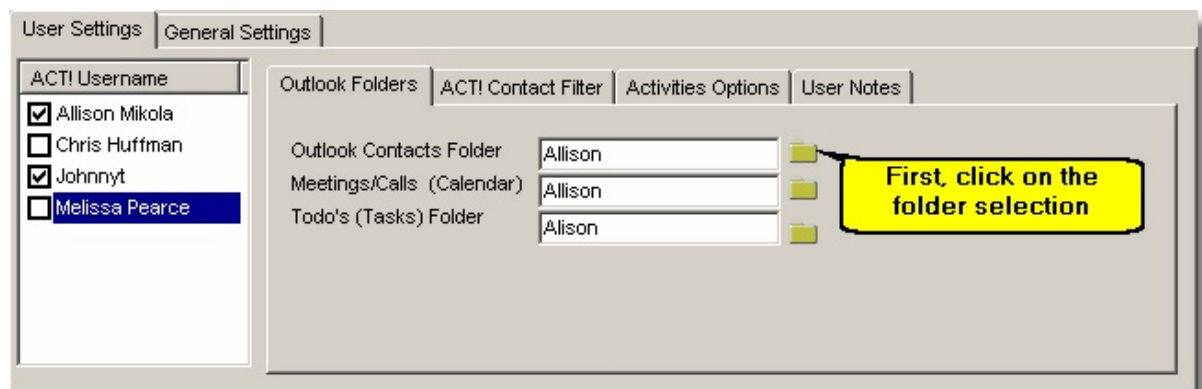
For example, below, we want to clear Mellisa Pearce's link to Allison's Contact Folder.

To clear the link,

1. Click on the folder selection
2. Select the Cancel button
3. Select Yes to clear the Outlook entry from the User Settings.

One thing: Only when the last user has cleared the folder link will the relevant Index maintained by the software be cleared. This means, for example, if you have 3 users pointing to the same Outlook folder, clearing one will not reset the item index for that folder. Only when the last user is disconnected, is the index reset.

### Visual Description on how to clear the Outlook Folder Link



## 6.5 Using The Contact Filters

The contact filters are specific for each user. The users are processed by the settings in their contact filters in the order below:

1. Convert All
2. Convert Calendar
3. Convert Group
4. Do not Convert.

Wise usage of the filter configurations will enable you to reduce processing time when converting data. Just a couple of tips:

- If all users share one contact folder, you just need to do 1 Convert All. You can set all the subsequent user contact filters to Do Not Convert. Make sure, however, that the user that does the Convert All is enabled (check marked).
- Convert All and Convert Query are the fastest conversion modes. Calendar and Group will always be slower for the same number of contacts.
- No conversion optimization is done for the first time a conversion is done. However, subsequent conversions are significantly faster, in some cases about 2000% faster.

## 6.6 Empty Contact Names

You will receive the screen below if a contact that has no name is encountered. 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 2006 Edition 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.** The software 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.** 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.** Cancel the conversion of the ACT! Database into Outlook.
5. **Do not ask again.** Continue processing this contact and in the event of another contact being blank named, continue processing.



# **ACT-To-Outlook Professional 2006 Edition**

Accurately Transfer ACT! 2005/2006 Databases into Outlook

## **Part**

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**VII**

## 7 Tips and Tricks

### 7.1 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 2006 Edition 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 2006 Edition will ignore the Address conversions.

### 7.2 Limitations

#### Outlook Folder Limitation

Outlook 2003 limits the number of entries for folders to 64K. Hence, do not add more than 12K items to an Outlook folder.

#### Memory Limitations

ACT-To-Outlook Professional 2006 Edition 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 2006 Edition 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 2006 Edition to only pick Activity items after a certain date.

### 7.3 Errors

ACT-To-Outlook Professional 2006 Edition errors are generally followed by a code and a string that explains the error. From past experience, ACT-To-Outlook Professional 2006 Edition 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:

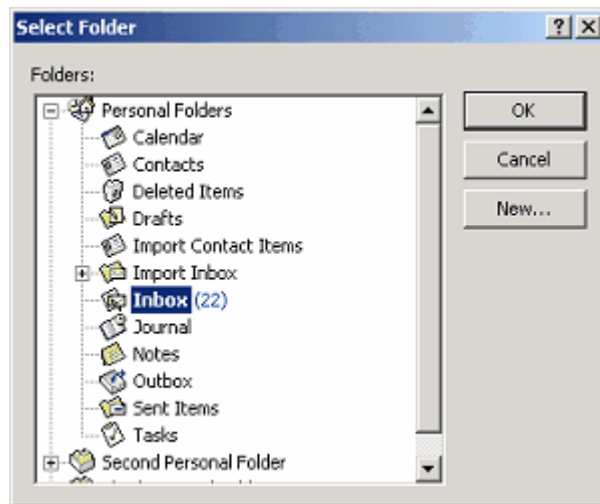
"ACT-To-Outlook Professional 2006 Edition: Error on retrieving Tasks Folder"

"ACT-To-Outlook Professional 2006 Edition: Error on retrieving Contacts Folder"

"ACT-To-Outlook Professional 2006 Edition: Error on retrieving Appointments/Calendar 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.

### **Out of Memory Error of Vbox Error**

This can occur if you are converting many history items into the contact's body text (the part in Outlook contact where you can write). There are various solutions problem:

1. Disable converting history.
2. Reduce the amount of history items that you convert.
3. Clean up your database of old history records

This is a limitation in Outlook when you put large amounts of text into the contact's body.

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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.

# **ACT-To-Outlook Professional 2006 Edition**

Accurately Transfer ACT! 2005/2006 Databases into Outlook

## **Part**



**VIII**



## 8 Known Problems With ACT!

### Corrupt ACT! Database

**Removal of Users from an ACT! database will corrupt your database** and result in fields that cannot be transferred to Outlook.

This is the most common issue we have with ACT! when using our product. We've had users that remove any additional users from their database only to see the database become corrupt as a result. Don't do it!

In general, you'll see strange errors popup and what used to work just fine no longer works.

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