



# Importer4Act

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## Installation

Download the setup file from:

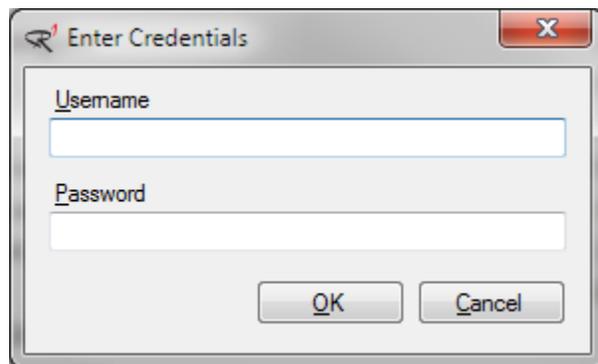
<https://www.keystroke.ca/en/apps/keystroke-downloads/download/4-4act-products/8-importer4act.html>

And then run the file to install the application.

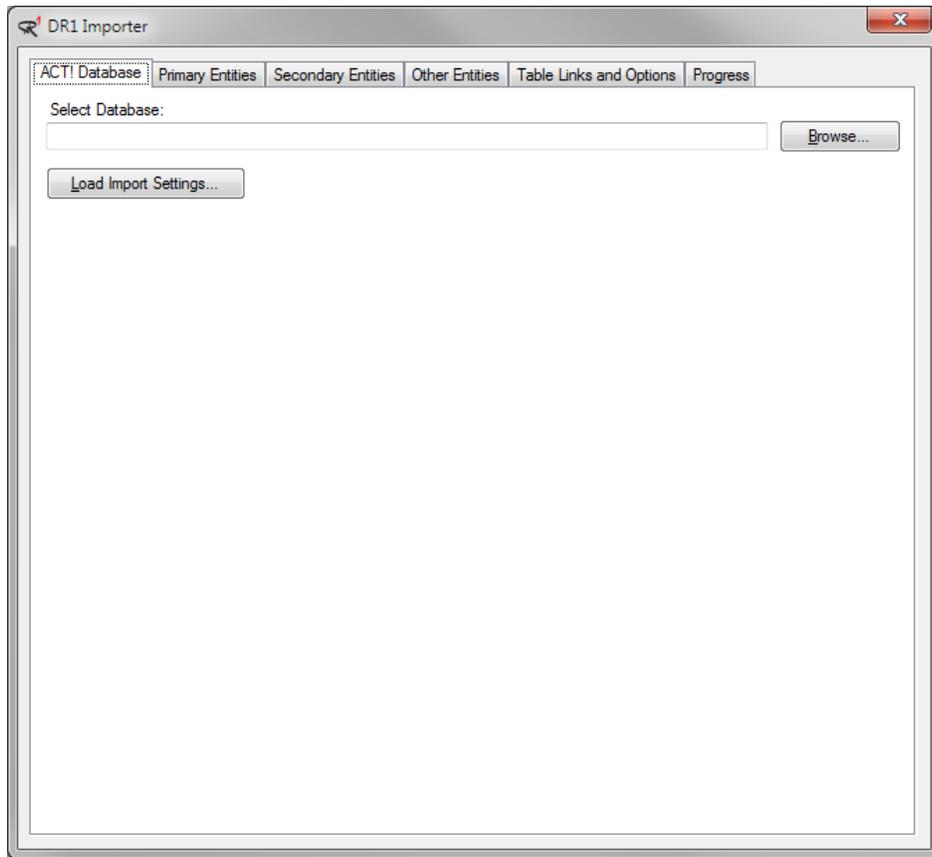
## Features

To Run the program:

1. Double click on the Importer4Act exe file.
2. Enter your ACC Admin pack credential and press ok, or enter your license key provided with purchase

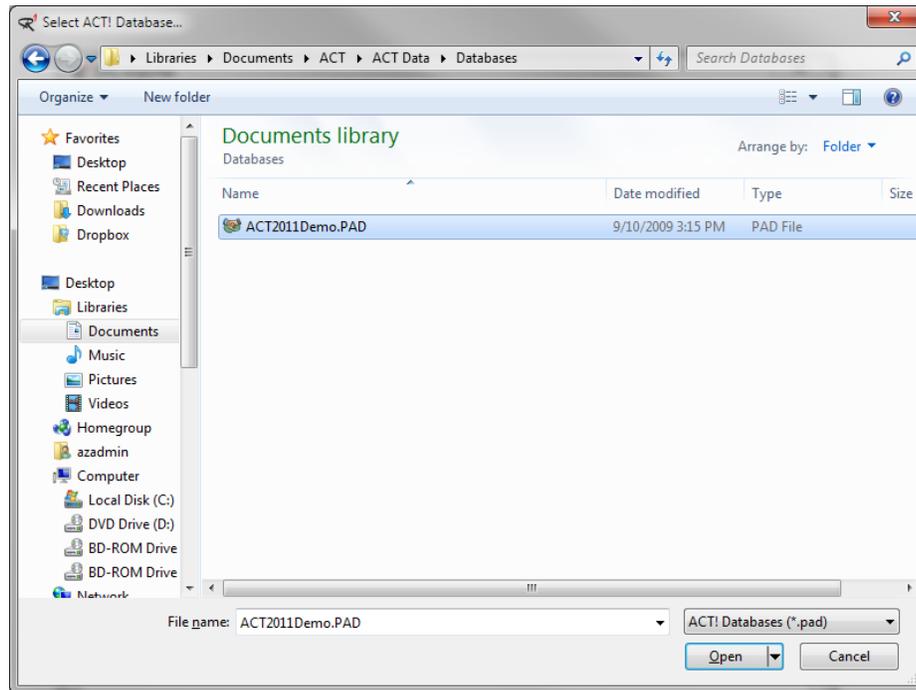


3. You are now read to use Importer4Act, you should see the following screen.

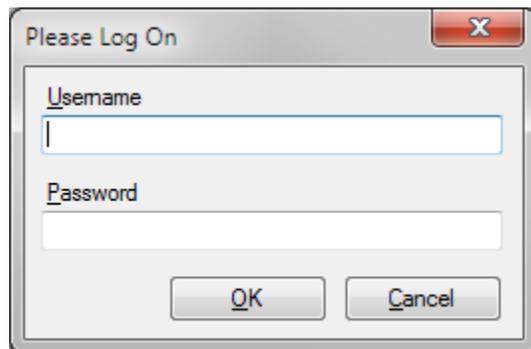


## Importing a Database

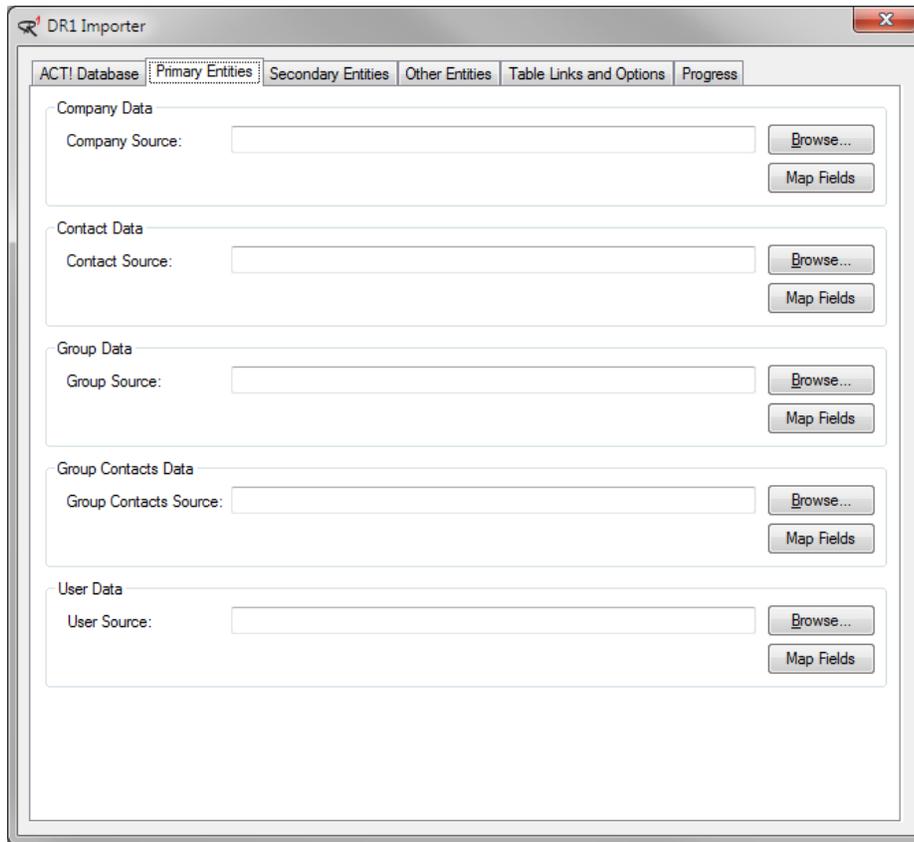
1. Select the database you'll be importing to by pressing the "Browse..." button.



2. Press the open button to choose your selected database.
3. You will be prompted for your username and password to log into your chosen database.



4. Next press the “Primary Entities” Tab

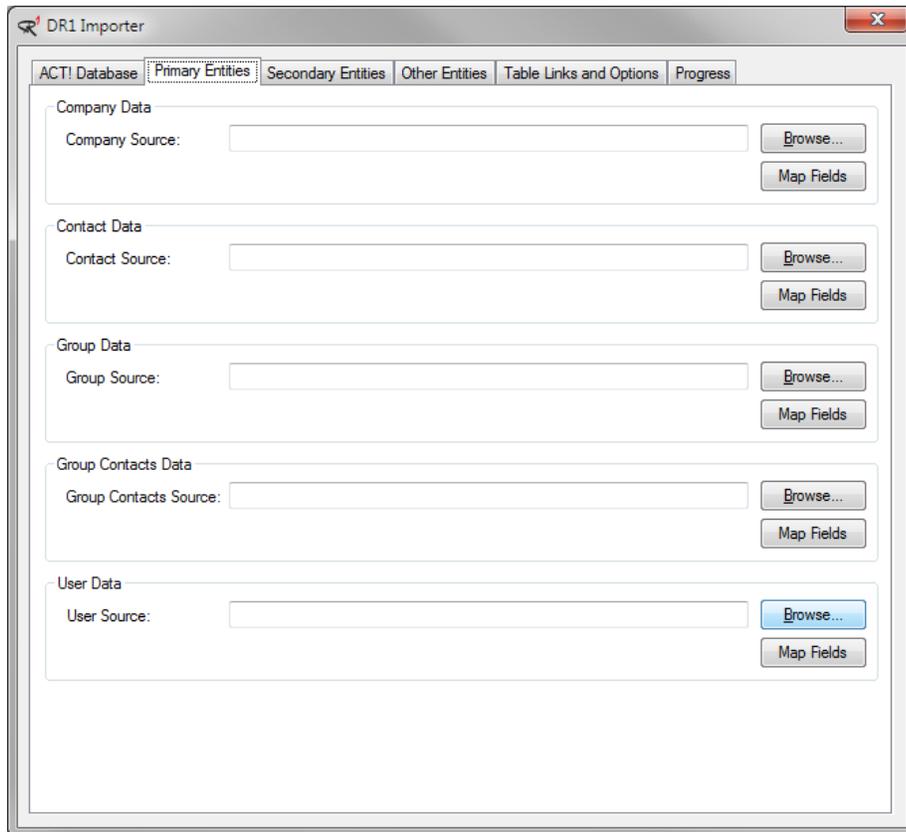


The screenshot shows the DR1 Importer application window. The title bar reads "DR1 Importer". The interface has a tabbed menu at the top with the following tabs: "ACT! Database", "Primary Entities" (which is selected), "Secondary Entities", "Other Entities", "Table Links and Options", and "Progress". The main content area is divided into five sections, each with a "Company Source:" label, a text input field, a "Browse..." button, and a "Map Fields" button below it:

- Company Data**: Company Source: [input field] [Browse...] [Map Fields]
- Contact Data**: Contact Source: [input field] [Browse...] [Map Fields]
- Group Data**: Group Source: [input field] [Browse...] [Map Fields]
- Group Contacts Data**: Group Contacts Source: [input field] [Browse...] [Map Fields]
- User Data**: User Source: [input field] [Browse...] [Map Fields]

5. The recommended order for mapping the primary entities to you new database are:
- 1) Users
  - 2) Companies
  - 3) Groups
  - 4) Contacts

- Click the “Browse...” button on the right hand side of the User Data block



- Select the source file for your user data (csv,txt,mdb,acddb,xls,xlsx,xml)
- You will then be prompted to select the table from your source file to map.
- Press OK to continue.
- Your selected file and table will then be displayed on the primary entities tab.
- Now Press the “Map Fields” Button located below the Browse button used to select your source database
- A new screen will appear with all of the source fields listed out for you to map to your destination fields in ACT!
- Select the destination field from the dropdown in the ACT! Field column for each of the source fields you’d like mapped into your destination ACT! database.
- On entities where fields can be created there is an option [Add New Field] in the ACT! Field dropdown. If selected you can type in the new field name and select a field type to be created. The name of your new field will be displayed in then ACT! Field column and be added to the ACT! field dropdown.
- Once you’re done mapping your fields you can press the “Save Map” Button to saving the mapping to a dmap file for later use.
- It is also recommended on entities where the Select ID Field appears that you map the id field on source database so that if an import needs to be re-done or fields that were not mapped can be mapped at a later time.
- Press OK on the field mapping screen to continue.

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Support

If you are experiencing problems or have questions please contact our support team at:  
[service@kqc.ca](mailto:service@kqc.ca)