

## *Data Fields Exporter for ACT!*

*Designed for ACT! 2007  
and beyond....*

## **Printed Manual**

# Data Fields Exporter for ACT! 2007+

Share your data with the World!

by *datafieldsexporter.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

*.csv is the international means to export data. We just do a better job at it.*

# Data Fields Exporter for ACT! 2007+

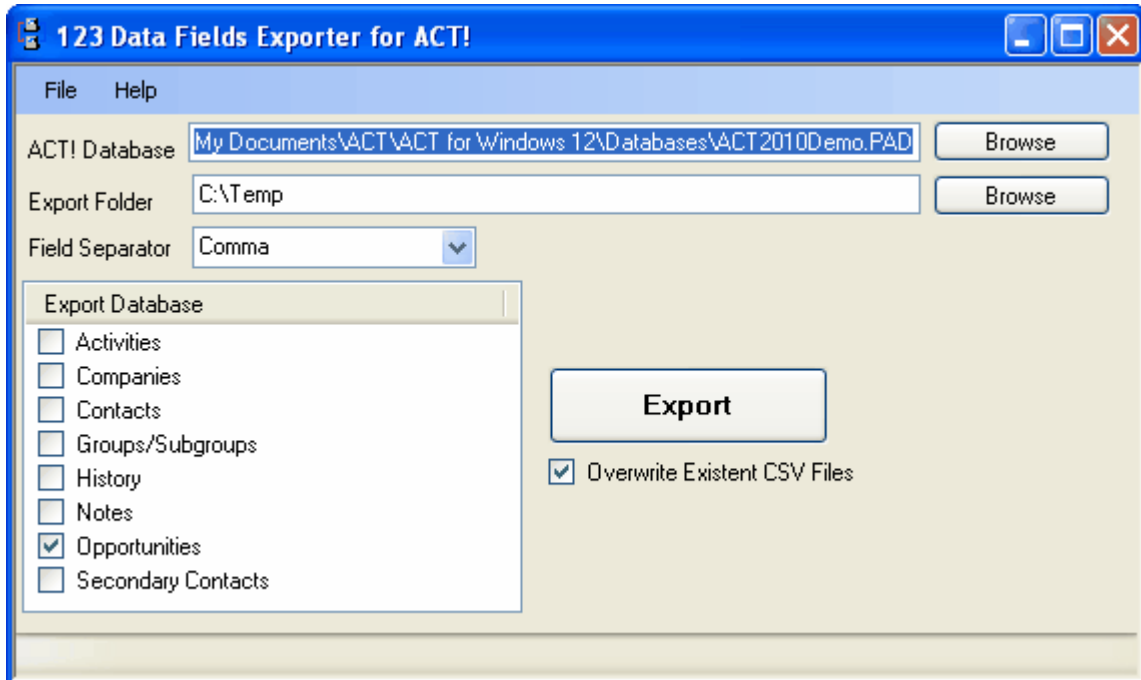
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# Part



# 1 Welcome

## **123 Data Fields Exporter for ACT!** **For ACT! 2007 or later** **Export all your ACT! data in .csv format**



The purpose of 123 Datab Fields Exporter for ACT! is to export all your ACT! data, including generated data so that it can be accessed using MS-Excell or another package for data mining or import.

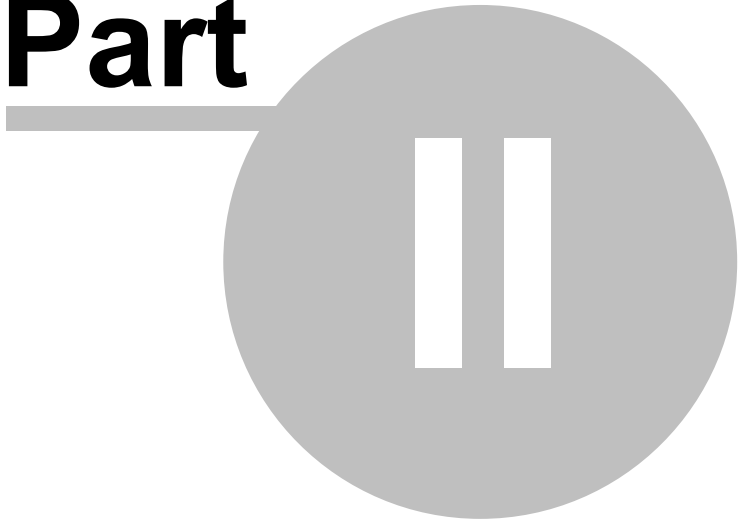
### Highlights of 123 Data Fields Exporter for ACT!:

- **Single Click Export.** No complex setup procedures. Just select the database and the export folder and we do the rest.
- **Export of Contact related histories/groups, notes, and more.** Contact data is exported with fields that contain complete history, notes, group membership, secondary contacts, and opportunities.
- **All the relevant ACT! tables are exported individually.**
- **Speed.** As fast as it can be.

# Data Fields Exporter for ACT! 2007+

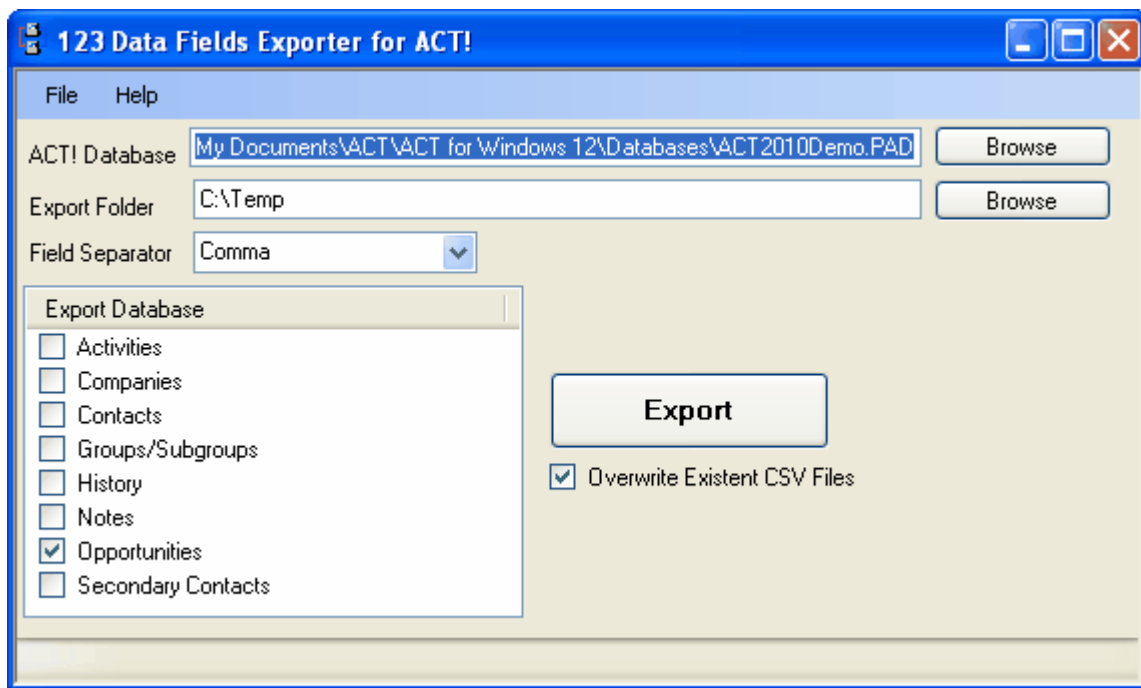
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## 2 Introduction



The purpose of 123 Synchronizer 2010 Edition is to provide users with a tool to quickly convert, synchronize, update, and transfer 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 123 Data Fields Exporter

#### [Major Features](#)

<b>Ease of Use</b>	Install, and you are ready to go.
<b>ACT! Versions Supported</b>	123 Data Fields Exporter for ACT! supports ACT! 2007 and later editions.
<b>Field Conversion Capabilities</b>	All the fields in ACT! can be converted, whether they are standard fields or user defined fields. In addition, certain fields are generated; for example, a contact's history is concatenated into a single field and put under the History_Generated field in the contact.
<b>ACT! Tables Exported</b>	The following ACT! tables are exported. Every table contains the relevant item ID as well the parent/owner ID (where applicable): <ul style="list-style-type: none"> <li>• <a href="#">Activities</a></li> <li>• <a href="#">Companies</a></li> <li>• <a href="#">Contacts</a> - All ACT! Contacts and fields are converted/synchronized.</li> <li>• <a href="#">Groups and subgroups.</a></li> <li>• <a href="#">History</a></li> <li>• <a href="#">Notes</a></li> <li>• <a href="#">Opportunities</a></li> <li>• <a href="#">Secondary Contacts</a></li> </ul>
<b>Excel Compatible Attachments</b>	All files can be opened using Excel or a .csv import utility. The attachments links are embedded into the history/notes (where applicable).
<b>Evaluation Period</b>	123 Data Fields Exporter for ACT! allows you to export 30 records under the evaluation. A maximum total of 210 records (7 exports or 30 records) is allowed.

## 2.2 Help on 123 Data Fields Exporter

You can obtain help for 123 Data Fields Exporter for ACT! in the following ways:

- **The help file shipped with the product.** The help file provided with 123 Data Fields Exporter for ACT! 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.** A printer-friendly version of the manual may be obtained via the Help Section on 123 Data Fields Exporter for ACT! toolbar.
- **Email Support.** You can obtain free email support from DataFieldsManager.com. Make sure that you explain your problem/question with as much detail as possible. Use the support form on our web DataFieldsManager.com to contact us.
- **Personalized, one-on-one support.** DataFieldsManager.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.** DataFieldsManager.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.](#)

## 2.3 How to Buy 123 Data Fields Exporter



123 Data Fields Exporter for ACT! is distributed worldwide by a variety of resellers and distributors.

### To Purchase

Click on the Registration->Purchase menu option of 123 Data Fields Exporter for ACT! and you will be taken to the purchase page for the product.

### Home page

<http://www.datafieldsexporter.com>

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## 3 Installation

Installation of 123 Data Fields Exporter for ACT! is straightforward. The following is needed

- You'll need approximately 60mb of hard disk space if you do not have the .Net framework installed.
- You need .Net Framework 2.0 and 3.5 Installed
- ACT! 2007 or later. Works with ACT! Standard or Premium.
- Administrator Privilege if running Windows Vista, XP, XP Pro, and 2000
- On Windows Vista, please enable UAC so that we can run properly.

To install, simply execute the 123 Data Fields Exporter for ACT! executable and follow the directions to install the program.

Once installed, 123 Data Fields Exporter for ACT! is accessed via the Start->Programs->123 Data Fields Exporter for ACT! Menu.

### Sub-topics

123 Data Fields Exporter for ACT! Compatibility

Lists the system with which 123 Data Fields Exporter for ACT! is compatible with.

License Registration

Instructions on the procedures on registering 123 Data Fields Exporter for ACT!

End-User License Agreement

Uninstall

### 3.1 123 Data Fields Exporter for ACT! Compatibility

123 Data Fields Exporter for ACT! is an Addon Product for ACT!. Hence, it requires the user to have ACT! installed on the machine.

#### ACT! compatibility

[123 Data Fields Exporter for ACT! is compatible with all versions of ACT! from 2007 or later](#)

#### 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.

#### Operating System Compatibility

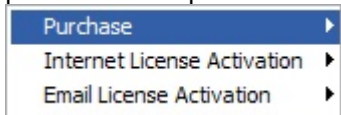
123 Data Fields Exporter for ACT! is compatible with the following Windows operating systems:

- Windows 2000
- Windows XP
- Windows XP Professional
- Windows Vista
- Windows XP 64-Bit
- Windows Vista 64-Bit

## 3.2 Registration

### [Purchasing 123 Data Fields Exporter for ACT!](#)

To purchase 123 Data Fields Exporter for ACT!, 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.

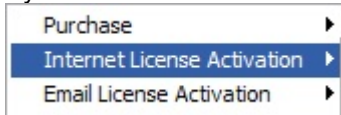


### [123 Data Fields Exporter for ACT! Registration](#)

123 Synchronizer 2010 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 123 Data Fields Exporter for ACT!, 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 123 Synchronizer.



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

 A screenshot of a dialog box titled 'License Activation'. The main heading inside is 'Enter License Key'. There are four input fields: 'Name', 'Company', 'Email Address', and 'License'. The 'License' field contains the text '83829-a809-dki0-098jd'. At the bottom right, there are two buttons: 'Close' and 'Register'.

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

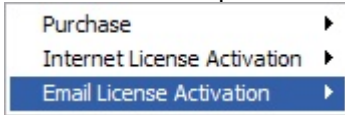
The license provided to you will only work on 1 computer. If you attempt to activate the software on another computer, the license server will not allow that.

### [123 Data Fields Exporter for ACT! Registration Problems](#)

To register, 123 Data Fields Exporter for ACT! sends a registration request to a license server. In 10

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

123 Data Fields Exporter for ACT!

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## 3.4 Uninstall

To uninstall 123 Data Fields Exporter for ACT!, do the following:

- Click on [Start->Settings->Control Panel](#)
- Execute [Add/Remove Programs](#) from the Control Panel
- Select 123 Data Fields Exporter for ACT! from the listed programs
- Click Remove and 123 Data Fields Exporter for ACT! will be removed from your system.

### A Few Things

- Installing and Uninstalling will **NOT** reset the evaluation period for 123 Data Fields Exporter for ACT!
- Uninstalling 123 Data Fields Exporter for ACT! will not reset the conversion counter

# Data Fields Exporter for ACT! 2007+

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## 4 Databases Exported

### 4.1 Activities

All the activities fields are exported. Find below a list of the activity details that are exported. Note, each ACT! Database is different and the fields below may not apply to all. But whatever fields you have in your ACT! database, you always get the generated fields (if any) that we manipulate in order to make it easy for you.

AccessorId	The GUID of the ACT! contact with a link to the Activity
AccessorName	The Name of the ACT! contact with a link to the Activity
ActivitySeriesAppliedId	
ActivityTimeZone	
AlarmDue	
AssociatedWith	
BannerColor	
CalendarAccessLevel	
ContactCount	
CreateDate	
CreateUserId	
Details	
DetailsIcon	
Duration	
DurationDaysUp	
DurationValue	
EditDate	
EndTime	
EventName	
HasAttachment	
HasAttachmentIcon	
ID	The Unique ID of the Activity
InvitationStatus	
IsAlarmCleared	
IsAlarmed	
IsCleared	
IsClearedIcon	
IsEvent	
IsInvitationAcknowledged	
IsLoggedUserOnlyParticipant	

## 4.2 Companies

All the Companies fields are exported. Find below a list of the activity details that are exported. Note, each ACT! Database is different and the fields below may not apply to all. But whatever fields you have in your ACT! database, you always get the generated fields (if any) that we manipulate in order to make it easy for you.

Access Level	
Address 1	
Address 2	
Address 3	
Billing Address 1	
Billing Address 2	
Billing Address 3	
Billing City	
Billing Country	
Billing State	
Billing ZIP Code	
City	
Company	
Company Description	
CompanyMembersIDs	Generated Field. Comma delimited list of the related ACT! Contacts to the company
CompanyMembersNames	Generated Field. Comma separated list of ACT! Contact's names related to the company.
Country	
Create Date	
Customer ID	
Division	
Edit Date	
Extension	
Fax Extension	
Fax Phone	
Has Divisions	
Hierarchy Level	
ID	Company Unique ACT! ID

ID/Status	
Industry	
Last Edited By	
Number of Employees	
Phone	
Private	
Record Creator	
Record Manager	
Referred By	
Region	
Revenue	
Shipping Address 1	
Shipping Address 2	
Shipping Address 3	
Shipping City	
Shipping Country	
Shipping State	
Shipping ZIP Code	
SIC Code	
State	
Territory	
Ticker Symbol	
Toll-Free Extension	
Toll-Free Phone	
Web Site	
ZIP Code	

### 4.3 Contacts

All the Contacts fields are exported. Find below a list of the activity details that are exported. Note, each ACT! Database is different and the fields below may not apply to all. But whatever fields you have in your ACT! database, you always get the generated fields (if any) that we manipulate in order to make it easy for you.

Access Level	
Address 1	
Address 2	
Address 3	
Alternate Extension	
Alternate Phone	
Birth Date	
City	
Company	
Contact	
Country	
Create Date	
Customer ID	
Department	
Edit Date	
E-mail	
Extension	
Fax Extension	
Fax Phone	
First Name	
First Purchase	
GroupMembershipGenerated	Generated Field. This is a comma separated list of the group memberships for the contact.

Home Address 1	
Home Address 2	
Home Address 3	
Home City	
Home Country	
Home Extension	
Home Phone	
Home State	
Home ZIP Code	
ID	The Unique ID of the contact
ID/Status	
Is Imported	
Is User	
Key Contact	
Last Attempt	
Last Edited By	
Last E-mail	
Last Meeting	
Last Name	
Last Reach	
Last Results	
Last Yrs Purchases	
Letter Date	
Messenger ID	
Middle Name	
Mobile Extension	
Mobile Phone	
Name Prefix	
Name Suffix	
NotesHistoryGenerated	Generated Field. This is a list that is the result of the concatenation of all the notes and history items related to the contact. Date, Ownership and the text of the items are all listed here in one field i.e. the contact's notes/history.

Pager Extension	
Pager Phone	
Personal E-mail	
Phone	
Private	
Record Creator	
Record Manager	
Referred By	
SalesOpportunitiesGenerated	Generated Field. This is a list of all the sales opportunities related to the contact put together into 1 field.
Salutation	
Secondary Access Level	
Secondary Address 1	
Secondary Address 2	
Secondary Address 3	
Secondary City	
Secondary Company	
Secondary Contact	
Secondary Country	
Secondary E-mail	
Secondary Fax Phone	
Secondary First Name	
Secondary ID/Status	
Secondary Last Name	
Secondary Mobile Phone	
Secondary Phone	
Secondary Phone Extension	
Secondary State	
Secondary Title	
Secondary Web Site	
Secondary ZIP Code	
SecondaryContactsGenerated	Generated Field: This is a list of all the secondary contacts related to the contact with all the details listed.
Spouse	
State	



Title	
Trivia	
User 1	
User 10	
User 2	
User 3	
User 4	
User 5	
User 6	
User 7	
User 8	
User 9	
UserDate1	
Web Site	
Work Phone Extension	
Work Phone Phone	
ZIP Code	

#### 4.4 Groups/Subgroups

All the Groups fields are exported. Find below a list of the activity details that are exported. Note, each ACT! Database is different and the fields below may not apply to all. But whatever fields you have in your ACT! database, you always get the generated fields (if any) that we manipulate in order to make it easy for you.

Access Level	
Address 1	
Address 2	
Address 3	
City	
Country	
Create Date	
Edit Date	
Group Description	
Group Name	
GroupMembersIDs	Generated Field. Comma separated list of the ID of contact names associated with this group
GroupMembersNames	Generated Field. Comma separated list of the contact names that belong to this group.
Has Subgroups	
Hierarchy Level	
ID	
Last Edited By	
ParentID	
Private	
Record Creator	
Record Manager	
State	
ZIP Code	

## 4.5 History

All the History fields are exported. Find below a list of the activity details that are exported. Note, each ACT! Database is different and the fields below may not apply to all. But whatever fields you have in your ACT! database, you always get the generated fields (if any) that we manipulate in order to make it easy for you.

AssociationSummary	
Attachment	
AttachmentDisplayName	
AttachmentFileExtension	
AttachmentFileName	
AttachmentFileSize	
AttachmentFileSizeDisplay	
AttachmentFileType	
AttachmentIconLarge	
AttachmentIconSmall	
AttachmentLastModified	
ContactSummary	
CreateDate	
CreateUserID	
CreateUserName	
Details	
Duration	
EditDate	
EditUserID	
EditUserName	
EndDate	
EndTime	
HasAttachment	
HistoryType	
HistoryTypeID	
ID	
IsPrivate	
ManageUserID	
ManageUserName	
Regarding	
RegardingAndDetails	
StartDate	
StartTime	

## 4.6 Notes

All the Notes fields are exported. Find below a list of the activity details that are exported. Note, each ACT! Database is different and the fields below may not apply to all. But whatever fields you have in your ACT! database, you always get the generated fields (if any) that we manipulate in order to make it easy for you.

Attachment	
ContactCount	
ContactSummary	
CreateDate	
CreateUserID	
CreateUserName	
DisplayDate	
DisplayTime	
EditDate	
EditUserID	
EditUserName	
HasAttachment	
ID	
IsPrivate	
ManageUserID	
ManageUserName	
NoteText	

## 4.7 Opportunities

All the Opportunities fields are exported. Find below a list of the activity details that are exported. Note, each ACT! Database is different and the fields below may not apply to all. But whatever fields you have in your ACT! database, you always get the generated fields (if any) that we manipulate in order to make it easy for you.

ActualCloseDate	
AssociatedCompaniesCount	
AssociatedGroupsCount	
Associates	
Company	
Competitor	
Contact	
ContactCount	
CreateDate	
Creator	
DaysOpen	
Details	
EditDate	
EstimatedCloseDate	
GrossMargin	
ID	
IsPrivate	
Manager	
Name	
OpenDate	
OpportunityMembersIDs	Generated Field: comma separated list of ACT! contacts related to the Opportunity
OpportunityMembersNames	Generated Field: comma separated list of ACT! contacts Names related to the Opportunity

OpportunityProducts	Generated list of products.
Probability	
ProcessName	
ProductNames	
ProductTotal	
Reason	
Source	
Stage	
Stage_Description	
Stage_Number	
Stage_Probability	
StageID	
Status	
TotalPerCompany	
TotalPerContact	
TotalPerGroup	
User1	
User2	
User3	
User4	
User5	
User6	
User7	
User8	
WeightedTotal	

## 4.8 Secondary Contacts

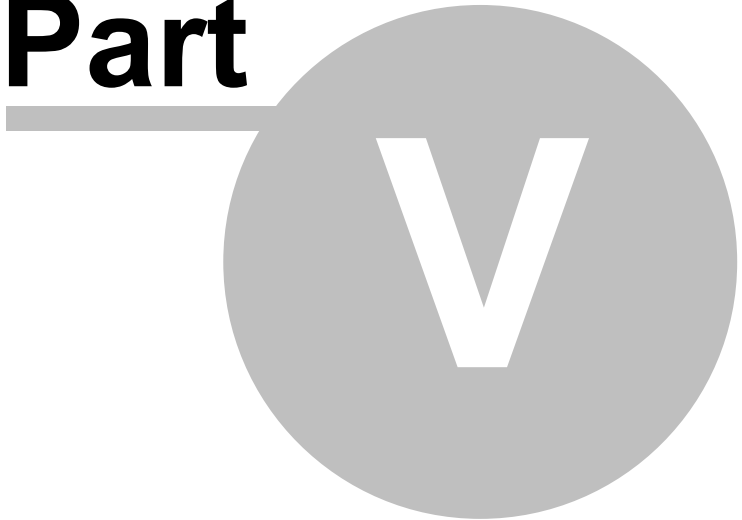
All the Secondary Contacts fields are exported. Find below a list of the activity details that are exported. Note, each ACT! Database is different and the fields below may not apply to all. But whatever fields you have in your ACT! database, you always get the generated fields (if any) that we manipulate in order to make it easy for you.

Address 1	
Address 2	
Address 3	
City	
Company	
Contact	
Country	
E-mail	
Extension	
Fax Phone	
First Name	
ID	
ID/Status	
Last Name	
Mobile Phone	
ParentID	
ParentName	
Phone	
Private	
State	
Title	
Web Site	
ZIP Code	

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## 5 Running Data Exporter

### 5.1 Background Processing

123 Data Exporter for ACT! can be run in the background. To do that, call the executable that is built for your ACT! database with a -B flag. For example:

For ACT! 2010, Build 12.0.x: "C:\Program Files\Data Fields Exporter for ACT!\123-Data-Fields-Exporter-12.exe" "-B"

For ACT! 2010, Build 12.1.x: "C:\Program Files\Data Fields Exporter for ACT!\123-Data-Fields-Exporter-12.1.exe" "-B"

Make sure that all the settings are correct and that you have overwrite files enabled so that the software will run.

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