

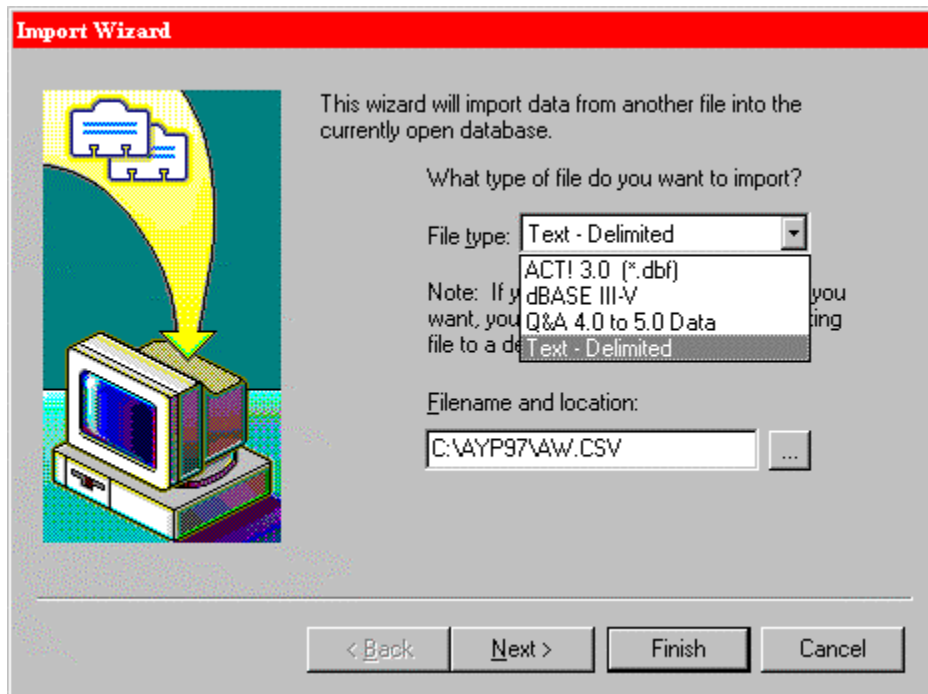


PINNACLE LISTS

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IMPORTING DATA: ACT!

1. Click on **File** and **New**. Select **ACT! Database** and click **OK**.
2. Give the new database a name and click on **Save**.
3. A "My Record Information" box will appear. If all of the information is correct, click **OK**. Then it will ask you if the information is complete and correct -- answer appropriately.
4. Click on **File**, select **Data Exchange**, and click on **Import**.



5. In the **File type:** box, choose **Text - Delimited**.
6. Click the browse button (the button with the three dots on it) next to the **Filename and location:** box.
7. In the **Look in...** box, select the folder on your drive where your new data resides. Double-click on the file that appears in the window. Click on **Next**.

NOTE: your file must be named with a .txt or .csv extension to be visible in this window. We send out our files with .csv extension by default.

8. Make sure **Contact records only** is selected. Click on the **Options...** button and make sure there is not a check mark in the box next to **Yes, import the first record**. Click on **OK**, then **Next**.
9. Ensure that **Don't use predefined map** is checked, then click **Next**.
10. In the Contact Map window, match up the fields from your file with the fields in ACT!. Example: to map the field **Contact Name** from the left side of the list, click on the right side next to **Contact Name** & go through the list until you see **Contact**, then click on it. Do this same procedure for all the fields on the left side (if you don't need a particular field, don't map it; if you can't find anything on the right side that matches your field, you can select one of fifteen **User** fields).

On Time, On Target, Complete List Solutions!
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11. If you want to save the map you've created, click on **Save Map**. Give the map a name & click **Save**. You will be able to use this map for future imports with files that have the same fields.
12. Click on **Finish**, and the records will be imported into the database.

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