

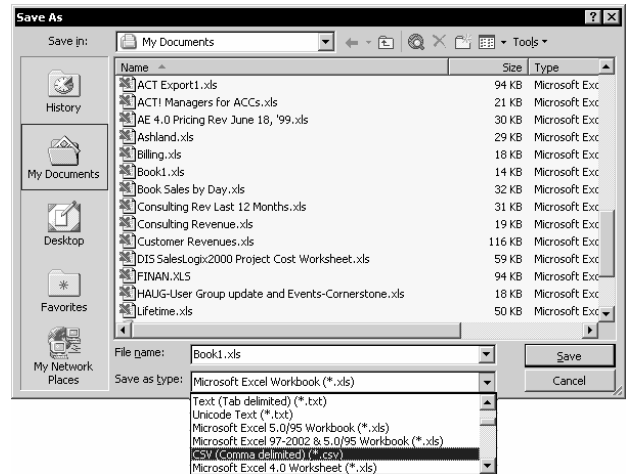
To Import an Excel Spreadsheet

If file already has a .CSV extension, skip this procedure and move to the next.

1. Open the file in Excel
2. Edit the file as necessary (delete extra rows at the top of the spreadsheet, clean up data, etc.)
3. **File, Save As...**, type a file name
4. Change the 'Save as type:' to

CSV (Comma delimited) (*.csv)

5. Change the location that you are saving the file, if necessary.
6. Click **Save**



To Import the Converted Data...

1. Open your ACT! database.
2. Click on **File, Data Exchange, Import...**
3. Change File type: to "Text - Delimited"
4. In the Filename and location:, use the browse button (the square with the 3 periods in it) to find the file that you want to import.
5. Change the Files of type: to 'Text – Delimited (*.csv)'
6. Click on the .CSV file and click **Open**
7. **Next>**
8. Verify that 'Contact records only' is checked and click **Next>**
9. **Next>** (Don't use predefined map)
10. Map the fields by clicking on the right side where they are blank, and using the drop down menu, select the column you are looking to match.
11. **Finish**
12. **Compress and Reindex** the database.

When the Open dialog box displays, make sure the 'Look in:' box is showing "My Documents."

The fields displayed in the left column are the field names from the file you are importing. The fields in the right column are the fields in your ACT! database. To match these columns

The information you are importing will go into your new database in the correct place

