

# ACT! to Daylite Conversion

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# Overview

This document is for ACT! users who wish to switch to Daylite or users who need information about ACT! to Daylite conversion before they switch to Daylite. If you are currently using ACT!, Marketcircle can convert your ACT! database into a Daylite database having the same volume of data. The way this process works is that we will acquire your ACT! database, perform the conversion on our end, and send you the Daylite database.

**ACT! versions supported:** We only support conversion for ACT! Premium 2011 version 13.0.401.0 (or lower) databases.

The ACT! conversion is a paid service. Read this document carefully to understand what the conversion process entails. We recommend that you familiarize yourself with Daylite during the 2-4 days turnaround involved in the ACT! conversion. When you receive the converted database, check the database for anomalies with the import. If any, do inform your designated new business team member, so that Marketcircle can investigate.

In the process of converting your ACT! database into a Daylite database, Marketcircle will try to bring in as much data as possible. However, any field that is not present in our list of supported fields will not be imported. If you are very specific about what kind of data gets imported, then go through this list in detail before you approach us for a database conversion. Keep in mind that we **don't** support the following:

- a. The suffix (for example, PhD, B.A., B.S, B.Sc, etc) cannot be imported properly because of how ACT! stores it. ACT! ties these suffixes to the contact's last name. There is no way for us to accurately split this during the import process. Keep in mind that the suffix is imported, just not in the most appropriate field.
- b. ACT! has a default phone field which stores the primary phone number. The rest of the phone fields are additional phones which are not stored in any ranked order. This means the second, third, and fourth phone numbers are not listed in any specific order. So, we can't control the order in which they will be imported.
- c. Emails, layouts and reports in ACT! cannot be brought into Daylite.
- d. In some cases, where you have significantly altered the original format of the ACT! custom defined field, several custom fields in ACT! cannot be imported into Daylite. These are rare cases. Also, note that later versions of ACT! only have 10 user-defined fields. If you have an older ACT! database (version 6.0 or earlier) with more than 10 user-defined fields, it's possible that they will be lost during the upgrade. We will try to salvage what we can.
- e. Secondary contacts.
- f. ACT! attachments for databases from ACT!11 to ACT! 13.
- g. Cleaning up notes/emails where the code is a part of the contents of the object.

# Specifications for the conversion

## a. ACT! Contacts

- Contacts from ACT! are converted directly to contacts in Daylite.
- In ACT!, contacts have a Company Name field, but in Daylite companies are treated as a separate entity: organizations.
- Thus, for every unique Company Name imported from ACT!, a corresponding Daylite organization will be created.
- If a contact record from ACT has no Name (i.e. no first name or last name) but has a company name, the organization corresponding to that name in Daylite will be populated with the contact information for that record, i.e. phone numbers, email, address, etc. <sup>1</sup>
- If there are multiple contact records with the same company name and no first name/last name each one will be added as its own record in organization.

## b. ACT! Groups

- Many people use Groups in ACT! to represent companies. Daylite has a feature called 'groups,' but instead uses organizations to represent companies.
- The Importer decides if an ACT! Group should be imported as a Daylite organization based on the following criteria:
  - If the Group name is also found as a Company Name in any of the Contact records
  - If the Group has a ticker symbol
- If the Group meets any of these criteria it will be imported as an organization rather than a Daylite group.
- However, because Daylite does not support sub-organizations, if the Group has subgroups or is a subgroup, will ALSO be imported as a Group, so that the Group hierarchy remains intact.

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<sup>1</sup> **No Name contacts:** In every ACT! conversion, there will be several contacts with 'No Name.' This is normal, so don't be alarmed. You will find that all these 'No Name' contact records are linked to an organization (company) record. This is the result of different database structures between ACT! and Daylite. Daylite stores both organization and contact as individual records, whereas ACT! consolidates them into one. During the import, we split the organization and contact into two records and link them together. This has many benefits that you will encounter as you begin to use Daylite. In cases where you have only filled in a Company Name in your ACT! database, you will see the record in Daylite with a 'No Name' contact record linked to it. You can consider this as a placeholder for a future point of contact for that company.

### c. ACT! Activities

- ACT! has 3 types of activities: Meeting, To-Do, and Phone Call.
- In Daylite, these three types can most logically be split into the two Daylite entities: tasks and appointments.
- ACT! Meetings are imported as appointments.
- ACT! Calls and To-Dos are imported as tasks.
- Any recurring Activities will show up, but at this time the importer does not convert recurrence settings, therefore it will appear as a once off task or appointment.

### d. ACT! Sales

- ACT! Sales are analogous to Daylite opportunities.
- Since Daylite does not support linking of groups to opportunities, if Daylite encounters an opportunity that is linked to a group (but that group has not been deemed an organization) Daylite will create a link between the opportunity and each member of the associated group.
- For ACT! versions 11 to 13, ACT! Sales are not supported.

### e. ACT! Note/History

- As in ACT!, notes are most commonly tied to an entity such as a contact or a group. The import should preserve these links.
- ACT! ties file attachments to a note, in Daylite, an attachment is called a "File Reference" and is a separate entity. It can be linked to a contact, group, or organization, so the link should remain intact.
- If however the file could not be found, that note will not be imported.
- ACT! stores the contents of a note and the formatting associated with it in a certain way which makes it difficult for our convertor to analyze. Our convertor does not have the ability to parse the formatting and separate it from the contents of the note. This may result in the note coming over into Daylite while having irrelevant code data along with the actual content. We cannot fix this either pre or post conversion.

### f. ACT! Templates

- At this time, Daylite does not import ACT! Templates. If you are having any problems finding a particular field from ACT!, please consult the conversion tables below.

# Conversion of an ACT! 2.8 - 6 (2000) database into a Daylite database

The following tables list the supported fields for the conversion of an ACT! 2.8 - 6 database into a Daylite database.

## ACT!: Contact ➔ Daylite: Contact

ACT! User Field	Location in Daylite
Address, City, State, Zip, Country	Contact card->Phones/Addresses tab
Phone Numbers	Contact card->Phones/Addresses tab
Department	Contact card->Organization link
Contact (Name)	Contact card-> split into first name, middle name and last name. If the name is prefixed with Mr., Mrs., Ms., Dr., etc, then that will be put in the Salutation field.
Title	Contact card->Organization link
Salutation	Contact card->Extra Fields Tab->Nickname field
Company	Contact card->Roles In Daylite, a single Contact can be linked to multiple Organizations, these links are created via a Role and are displayed as a list in the contact card. See <b>Help &gt; Daylite Help</b> for more information.
Assistant, Assistant Title, Assistant Phone, Assistant Extension	Contact view->Forms Tab
Referred By	Contact view->Forms Tab

ACT! User Field	Location in Daylite
Web Site	Contact Card->Phones/Addresses tab
E-Mail	Contact Card->Phones/Addresses tab
User1, User2, User3, etc (or whatever you renamed these fields to)	Contact view->Forms Tab
Last Results	Contact view->Forms Tab
Ticker	Contact view->Forms Tab
ID/Status	Contact card->Category
Notes/History List (except for notes with attachments)	Contact view->Activity Tab
Notes/History List (notes with attachments)	Contact view->Activity Tab
Activities List (for activities with type "Meeting")	Contact view->Activity Tab (or main Appointment view)
Activities List (for activities with type "Call" or "To-Do")	Contact view->Activity Tab (or main Task view)
Sales/Opportunities	Contact view->Linked To (or main Opportunity view). A Contact in Daylite is linked to Opportunities via a Role. Look for these links in the Linked To pane in the contact view. See <b>Help &gt; Daylite Help</b> for more information.
Groups	Contact view->Linked To, (or main Group view)

**ACT!: Group ➡ Daylite: Group or Organization**

The ACT! groups can be imported either as groups or organizations in Daylite.

ACT! Field	Location in Daylite (Group)	Location in Daylite (Organization)
Group Name	Group card->Name field	Organization card->Name
Description	Group card->Details Field	Organization card->Notes Drawer->note with title Description
Division	Group view->Forms Tab	Organization view->Forms Tab
Region	Group view->Forms Tab	Organization view->Forms Tab
Web Site	Group view->Forms Tab	Organization card->Phones/Addresses tab
Priority	Group Card->Extra Tab	Organization card->Extra Fields Tab
SIC Code	Group view->Forms Tab	Organization view->Forms Tab
Industry	Group view->Forms Tab	Organization card->Organization Tab
Revenue	Group view->Forms Tab	Organization view->Forms Tab
Employees	Group view->Forms Tab	Organization view->Forms Tab
Referred By	Group view->Forms Tab	Organization view->Forms Tab
Ticker	Group view->Forms Tab	Organization card->Extra Fields Tab
Notes/History List	Group view->Activity Tab	Organization view->Activity Tab
Activities List (for activities with type "Meeting")	Group view->Activity Tab	Organization view->Activity Tab

ACT! Field	Location in Daylite (Group)	Location in Daylite (Organization)
Activities List (for activities with type "Call" or "To-Do")	Group view->Activity Tab	Organization view->Activity Tab
Sales/Opportunities	N/A	Organizations view->'Linked to' pane
Contacts List	Group view->'Linked to' pane	Organizations view->'Linked to' pane
User1, User2, User3, etc..(or whatever you have named the user definable fields to)	Group view->Forms Tab	Organization view->Forms Tab
Address, City, State, Zip, Country	Group view->Forms Tab	Organization card->Phones/Addresses tab

### ACT! Activities

ACT! Activities can be imported as either tasks or appointments.

ACT! Field	Location in Daylite (Task)	Location in Daylite (Appointment)
Activity Type	N/A	Appointment Card->Type Image
Date	Task Card->Start Date	Appointment Card-> Start Date
Time	N/A	Appointment Card->Start Time
Duration	N/A	Appointment View->Column options
With	Task Card->Linked pane	Appointment Card->Linked pane
Regarding	Task Card->Task Name	Appointment Card->Name
Priority	Task Card->Priority	N/A

ACT! Field	Location in Daylite (Task)	Location in Daylite (Appointment)
Associate with Group	Task Card->Linked pane	Appointment Card->Linked pane
Ring Alarm x Minutes before Activity	Task Card->Reminder	Appointment Card->Reminder
Show full day banner	N/A	N/A
Details:	Task Card->Details	Appointment Card->Details
Recurring Settings	N/A	N/A
Private Activity	N/A	N/A
Send e-mail message to activity participants	N/A	N/A

### ACT! Sales/Opportunities

ACT! Field	Location in Daylite
Product	Opportunity Card->Estimate Tab
Type	Opportunity Card->Opportunity Tab
Units	Opportunity Card->Estimate Tab
Unit price	Opportunity Card->Estimate Tab
Amount	Opportunity Card->Estimate Tab
Forecasted close date	Opportunity Card->Opportunity Tab
Probability	Opportunity Card->Opportunity Tab
Sales Stage	Opportunity View->Progress Tab
Sales opportunity with	Opportunity View->Linked To pane
Associate with group	N/A
Creation Date	Opportunity View->Opportunity Tab

ACT! Field	Location in Daylite
Main Competitor	Opportunity View->Forms Tab
Record Manager	Opportunity View->Forms Tab
Details	Opportunity Card->Details
Actual Close Date	Opportunity Card->Opportunity Tab
Reason	Opportunity Card->Opportunity Tab

# Conversion of an ACT! 7 - 13 database into a Daylite database

Only the following fields listed here are supported by the ACT! to Daylite Conversion tool while converting an ACT! 7 - 13 database into a Daylite database.

**ACT!: Contact ➡ Daylite: Contact**

ACT! User Field	Daylite User Field
Date created	Date Created
date modified	Date Modified
Company	Organization (Company/ Work)
Name	Full Name
Address 1	Address
Address 2	Address
Address 3	Address
City	City
State	State
Postal Code/Zip	Postal/Zip Code
Country	Country
Phone	Phone 1
Fax	Phone 3
Home Phone	Home Phone
Mobile	Mobile Phone
Pager	Pager
Salutation	Salutation
Title	Role (Job title)
User 1	Extra Field 1
User 2	Extra Field 2

ACT! User Field	Daylite User Field
User 3	Extra Field 3
User 4	Extra Field 4
User 5	Extra Field 5
User 6	Extra Field 6
User 7	Extra Field 7
User 8	Extra Field 8
User 9	Extra Field 9
User 10	Extra Field 10
Home Address 1	Address 2 Street
Home Address 2	Address 2 Street 2
Home City	Address 2 City
Home State	Address 2 State
Home ZIP Code	Address 2 Postal/Zip Code
Home Country	Address 2 Country
Alt	Alt Phone
Ext	Phone 1 Extension
Department	Department
Spouse	Relationship to me
Web Site	Web
E-mail	Email 1

**ACT!: Company → Daylite: Organization**

ACT! User Field	Daylite User Field
Name	Organization name
Address 1	Address 1
Address 2	Address 1 street 2

ACT! User Field	Daylite User Field
Address 3	Address 1 street 3
City	Address 1 City
State	Address 1 State
Zip Code	Address 1 Postal/Zip Code
Country	Address 1 Country
Description	Notes

**ACT!: Opportunity ➡ Daylite: Opportunity**

ACT! User Field	Daylite User Field
Date Created	Created On
Date Modified	Modified On
Probability	Probability
Sale date	Actual Close Date
State	State
Price	Unit Price
Open date	Start Date
Reason	Opportunity State Reason

**ACT!: Group ➡ Daylite: Group**

ACT! User Field	Daylite User Field
Name	Organization name
Address 1	Address 1
Address 2	Address 1 street 2
Address 3	Address 1 street 3
City	Address 1 City
State	Address 1 State

ACT! User Field	Daylite User Field
Zip Code	Address 1 Postal/Zip code
Country	Address 1 Country
Description	Notes

**ACT!: Activity ➡ Daylite: Tasks and Appointments**

ACT! User Field	Daylite User Field
Date created	Created on
Last modified	Modified on
Priority	Priority
Regarding	Title
Start time	Start
End time	End
Duration	Duration
Scheduled by	Owner
Scheduled with	Linked
Details	Details
Date	Date

**ACT!: NoteHistory ➡ Daylite: Notes**

ACT! User Field	Daylite User Field
Date Modified	Modified On
Regarding	Content

**ACT!: Line Items ➡ Daylite: Products and Services**

ACT! User Field	Daylite User Field
Product name	Name
Item #	SKU
Quantity	Quantity
Cost	Cost
Price	Price
Discount	Discount
Subtotal	Total

**ACT!: User ➡ Daylite: User**

ACT! User Field	Daylite User Field
Name	Name
Last Logged On	Last Logged On
Password Expired	Active (checkbox)
LogOn Name	Username

# ACT! Conversion Agreement Form

I ..... authorize a Marketcircle technician to perform a data conversion using my ACT! database.

Marketcircle will use my ACT! database solely for the purpose of completing the data conversion into Daylite and will promptly delete my ACT! database after the service is complete.

I have read the conversion guide and understand the following:

- My ACT! database is imported as is. Marketcircle will not do data scrubbing\* of any kind.
- Data will be imported as per the conversion guide chart(s). The migration path of the data fields cannot be changed.
- My ACT! database will be upgraded to ACT! 2008 version 10 premium. Any discrepancies I point out will be checked against the upgraded ACT! 2008 version 10 premium database.
- My data will be presented to me in a different way than it was in ACT!
- I have 7 business days to bring up any issues with the ACT! conversion. After that, Marketcircle is not responsible for any anomalies in my database.

Basic information required:

1. What time-zone are you located in?.....
2. What is your ACT! username (required)?.....
3. What is your ACT! password, (if set)?.....
4. What version of ACT! were you using?.....

## Customer information

Signature: .....

Name: .....

Title: .....

Date: .....

\* data scrubbing is the manual manipulation of data before, during, or after an import.

# Frequently asked questions

**1. Can letter attachments created in ACT!'s native editor be brought into Daylite and if so, can they be read?**

Letter attachments created in ACT!'s native editor cannot be brought over into Daylite as it is not supported.

**2. Some of the attachments have lost their links to the contacts, but they are still in the Attachments folder. Will they be brought over even though the link is missing?**

If this is an ACT! 10 conversion, the attachments in the folder may be brought over. However, there will be no reference in Daylite to that file if none existed in ACT!. If this is an ACT! 12 conversion, Attachments are not supported (as per the Conversion Guide).

**3. Do you foresee any problems with importing fields that are not supported by the conversion process into form fields via a text file using the 'Unique' matching process for names?**

The general rules of importing delimited data apply. If the data you are importing is mapped correctly and matches the equivalent value in Daylite, there should be no issues. As always, it is best to test your import against a backup of your database in a test environment.

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