# 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. [1]
- 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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[1] **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 **Help > Daylite Help** 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 **Help > Daylite Help** 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.