

Converting from ACT![®] to ZOHO[®]

Using Exporter[®] Software

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Getting Ready

Data Clean-up

If you weren't using the data in ACT!, you probably won't be using the data in ZOHO.

1. Remove duplicate records
2. Remove records where the Contact and/or Company is blank.
3. Make certain any picklist that you plan to move contains only valid data.
4. Separate the data that will be imported. You can put it in groups and only export those groups.
5. Clean up your Group list.

Analyze the Conversion Data

Decide what data will be imported from ACT! and where it will go in ZOHO. Here are few questions to address that can help set up your ZOHO org.

1. Do you want to import everything? Or, can some of the really old data be filtered out.
2. Do you want to use Leads and only import your qualified Contacts into the ZOHO Accounts/Contacts?
3. How do you plan to deal with attachments? Our recommendation is to use Drop Box for your external storage. There is a free Drop Box for ZOHO app.
4. ACT! allows you to keep inactive users in the system. As you move into a new database, you may not want to continue this practice. The Exporter software allows you to map your ACT! users to valid ZOHO users.

Export the ACT! Data

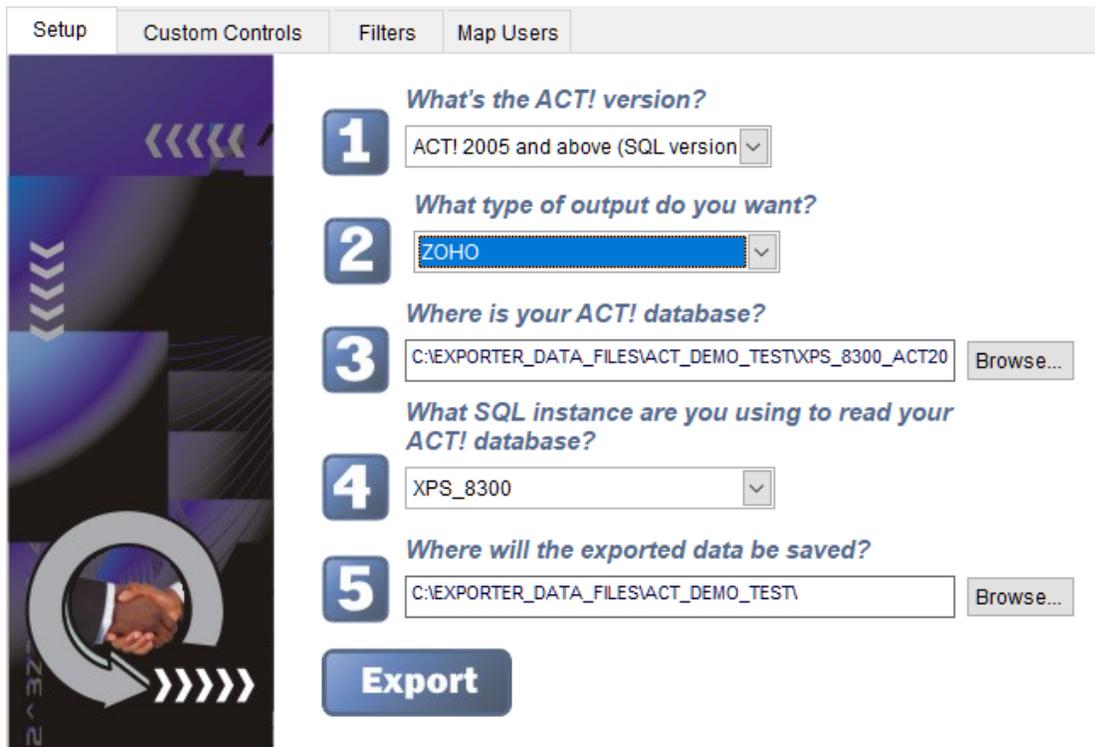
There is a separate User Guide for the Exporter software. It is recommended that you read it before proceeding. The steps below are a summary to get you started.

Depending on the size of your database, full extracts can take a while. We suggest that you first export a sample of your database for testing.

Setup Tab

1. Select the version of your ACT! database.
2. Select the **ZOHO** option.
3. Browse to your ACT! database and select it.
4. Select the SQL Server Instance you are using to read the database
5. Browse to a folder to put the exported data and select it.

This will auto-fill to the same folder as the database.



The screenshot shows the 'Setup' tab of the ACT! Exporter software. The interface is divided into four main sections: 'Setup', 'Custom Controls', 'Filters', and 'Map Users'. The 'Setup' section contains five numbered steps, each with a question and a corresponding input field or button. Step 1 asks 'What's the ACT! version?' with a dropdown menu set to 'ACT! 2005 and above (SQL version)'. Step 2 asks 'What type of output do you want?' with a dropdown menu set to 'ZOHO'. Step 3 asks 'Where is your ACT! database?' with a text input field containing 'C:\EXPORTER_DATA_FILES\ACT_DEMO_TEST\XPS_8300_ACT20' and a 'Browse...' button. Step 4 asks 'What SQL instance are you using to read your ACT! database?' with a dropdown menu set to 'XPS_8300'. Step 5 asks 'Where will the exported data be saved?' with a text input field containing 'C:\EXPORTER_DATA_FILES\ACT_DEMO_TEST\' and a 'Browse...' button. At the bottom of the setup section is a large blue 'Export' button. The left side of the interface features a vertical navigation bar with a circular arrow icon and a 'ZE v 2' label.

Custom Controls Tab

Specify how you want Accounts built.

If you're testing, here are some helpful settings-
--Select Run in Evaluation Mode and specify your sample size.
--Set the "Drop Fields" limit to zero to force all fields to be exported.

Setup	Custom Controls	Filters	Map Users
<i>Custom Controls allow you to add controls for the exported data to meet the requirements of your target application.</i>			
<input type="checkbox"/> Remove embedded LF & CR characters.	Date Format	Seperator	Time Format
<input type="checkbox"/> Include cleared activities	MM/dd/yyyy	T	HH:mm:ss
<input type="checkbox"/> Include Date with note text.	<input checked="" type="radio"/> Comma Delimited <input type="radio"/> TAB Delimited		
<input checked="" type="checkbox"/> Include User Name with note text.			
Split Text over 100000 Rows OR 50 MegaBytes	<input checked="" type="checkbox"/> Run in Evaluation Mode	Size	800
<input checked="" type="checkbox"/> Add Phone Country Code Except for: 1	<input type="checkbox"/> Combine Phone and Ext. with Text String		
Create Accounts using Name plus <input checked="" type="radio"/> None <input type="radio"/> State <input type="radio"/> City <input type="radio"/> Zip/PC	Drop fields with less than 0 entries		
Combine into single contact field: <input type="checkbox"/> Note <input type="checkbox"/> History <input type="checkbox"/> Note/History <input type="checkbox"/> Activity	Drop Multiple Instances: <input type="checkbox"/> Note <input type="checkbox"/> History <input checked="" type="checkbox"/> Opportunity <input checked="" type="checkbox"/> Activity		
<input type="button" value="Set to Default"/>			

Remap the ACT! Users

Specify how the ACT! contacts will be assigned in ZOHO. By remapping during export, you will save a significant amount of time when preparing the records for import.

In this example only Chris Huffman and Allison Mikola are moving to ZOHO. Allison will become the owner of all records that don't belong to Chris.

Remap ACT! User names to Target system User names

ACT! User Name	ACT! User ID	Target System UserID
Allison Mikola	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Betty Brower	U6689D53A-6FC8-492E-873A-641E2059BA72	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Chris Huffman	U086273C0-12CF-446E-9AFE-F09164628D4D	U086273C0-12CF-446E-9AFE-F09164628D4D
Ernst Anderson	UCF47F0E8-4A3B-498F-A327-CFF670D48AAC	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Fred Fenderline	U7DB3666D-2B70-4DEB-8AFE-575CBE72E932	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Jonathan Sommer	U50A13FE7-961C-4E8D-AEB1-BAA4C1A74F50	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Juliette Rosseux	U6AD0E080-B19B-4B68-B8EC-2755D99358CA	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Melissa Pearce	UFD540A2D-A131-41B3-947B-1B9DFA826597	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2
Sarah Whiting	UD9C02DC2-3B07-48E6-8335-9AC969A66AAB	U9A952FCB-ECF6-4FCE-92D1-047686F03BD2

Note--User map is saved as a CSV file which can be modified using Excel.
 A blank will be inserted for any User not mapped.

Apply Filters

ACT! creates a history record for numerous events – when you delete a contact, change a field, sync the database, send a mass mailing etc. In some older databases this can be over 100K+ records. We suggest that you always set the “Recommended filters” on.

For testing, we suggest that you use the Group filter to target your testing efforts to known contacts. You can build an ACT! group just for testing.

The screenshot shows the 'Filters' tab in the ACT! software interface. It is divided into several sections for configuring data filters:

- History Types to Include:** Radio buttons for 'All' and 'Selected Types'. A list of event types is shown, with 'Appointment Erased' and 'Appointment Not Completed' highlighted in yellow. A 'Recommended' button is located below the list.
- Groups to Include:** Radio buttons for 'All' and 'Selected Groups'. A list of contact groups is shown, with 'Customers without email addresses' and 'Prospects' highlighted in yellow.
- Table Filters:**
 - Data managed by:** Radio buttons for 'All' and 'Selected Users'. A list of user names is shown, including Allison Mikola, Betty Browser, Chris Huffman, Ernst Anderson, Fred Fenderline, and Jonathan Sommer.
 - Date range:** Radio buttons for 'All' and 'Selected Dates'. A date range selector is present with a 'Custom...' button.
 - Tables to apply filters:** Radio buttons for 'All' and 'Selected Tables'. A list of database tables is shown, including ACTIVITY, COMPANY, CONTACT, and HISTORY.

Exporter Output

When the Exporter completes, there will be a folder named ZOHO located in the path specified in Step 5. There will be several files, all with a .csv extension and a folder named Auxiliary Tables. .

CSV Tables

Name	Name
 Auxiliary Tables	 COMPANY.CSV
 ACCOUNT.CSV	 COMPANY_ASSOCIATIONS.CSV
 ACT_USER.CSV	 GROUP.CSV
 ACTIVITY.CSV	 MEMBERSHIP.CSV
 CONTACT.CSV	 OPPORTUNITY_PRODUCTSERVICE.CSV
 HISTORY.CSV	 OPPORTUNITY_ROLES.CSV
 Migration_Summary.csv	 PRODUCT.CSV
 NOTE.CSV	 RELATIONSHIPS_CONTACT.CSV
 OPPORTUNITY.CSV	 RESOURCES.CSV
 PICKLIST.CSV	 SALES_STAGE.CSV
 SECONDARY_CONTACTS.CSV	

The ACT! IDs

The Exporter software puts a letter in front of each of the IDs to help identify the type.

A Exporter Created Account	T Activity
X Account that was an ACT! Company	Q Product/Service
C Contact	P Product
H History	S Secondary Contact
N Note	G Group
O Opportunity	

ZOHO Setup

User Set-up – You DO NOT need to set up your users. The first .csv file you import will be the ACT_User file that will do this for you.

The Exporter will allow you to reassign ACT! users to your ZOHO users. While you can use inactive users in ZOHO, we do not recommend this and suggest that you delete them from the import file. You should also check that the e-mail, first and last names are correct. And, if you have already added these to ZOHO match the existing records.

Migration Summary. The Migration Summary is a list of the ACT! fields that DID NOT map to ZOHO fields. If you plan to transfer these, you will need to add them to ZOHO.

The Migration Summary also contains information about how your data is distributed. This may help you decide if you would like to apply any filters to the data instead of importing everything. Any field that has been created by the Exporter and not part of the ACT! database will be prefaced by X_. ACT! system fields the field will be prefaced by ACT_.

	A	B	C	D	E	F	G	H	I	J
4										
5	***									
6	*** ACCOUNT		ZOHO	Field			Valid	Invalid	Max	
7	ACT! Field	Mapped?	Field	Type	Length(DF	Populated	Picklist	Picklist	Length	
8	ACT_LEGACYID	No		Text	41	131				37
9	ACT_RecordMgr	No		Text	14	131				14
10	Billing Street 2	No		Text	254	52				26
11	Billing Street 3	No		Text	254	4				11
12	Customer ID	No		Text	8	2				8
13	ID/Status	No		Pick List	254	118	25	0		26
14	Referred By	No		Pick List	64	23	8	0		17
15	Shipping Street 2	No		Text	254	52				26
16	Shipping Street 3	No		Text	254	4				11
17	Toll Free Phone	No		Text	32	11				14
18	Account ID	Yes	Account ID	Text	41	131				37
19	Account Name	Yes	Account N	Text	128	131				34
20	Account Owner ID	Yes	Account C	Text	37	131				37
21	Billing Address 1	Yes	Billing Str	Text	254	115				30
22	Billing City	Yes	Billing Cit	Text	254	114				19
23	Billing Country	Yes	Billing Co	Text	254	114				14
24	Billing State	Yes	Billing Sta	Text	254	102				14
25	Billing ZIP Code	Yes	Billing Co	Text	254	112				10
26	Create Date	Yes	Created Ti	Date/Time		131				
27	Created By ID	Yes	Created B	Text	37	131				37

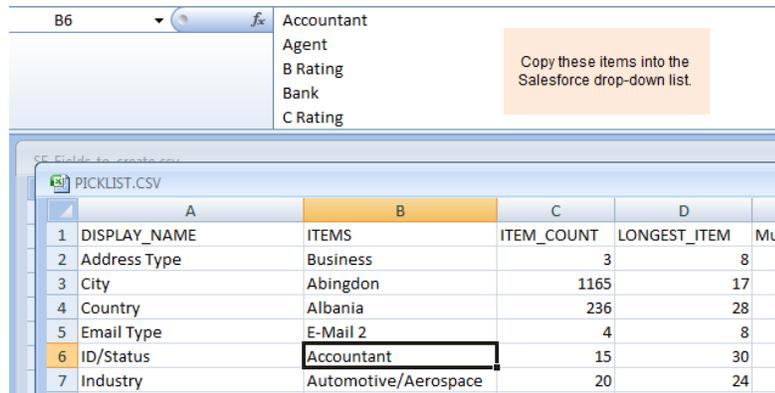
Add User Defined Fields to ZOHO. Using the Migration Summary, you need to determine which fields will transfer from ACT! to ZOHO. Please follow the instructions provided by ZOHO to add the fields.

We recommend that when you create the new fields in ZOHO you match the names in ACT! This will allow the import program to auto match your fields. If you want to change the names, you can do so after the import is complete.

We also recommend that you include the ID fields i.e. ACT_LegacyID etc. These will allow you to link back to ACT! should you need to retrieve data that may not have moved.

PickList.CSV– This file contains a list of fields that have pick list (drop downs) in ACT!. If you want to use the pick list in ZOHO, you can copy the values and when you define the field in ZOHO, paste the list into the field.

The ZOHO Migration Application provides the option of adding fields during the import process. This is OK for standard fields but can make a mess of the pick lists.



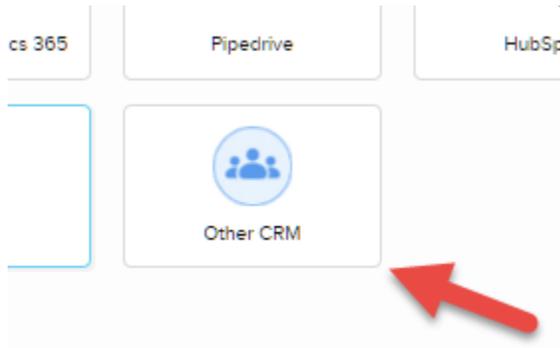
	A	B	C	D	Mu
1	DISPLAY_NAME	ITEMS	ITEM_COUNT	LONGEST_ITEM	
2	Address Type	Business	3	8	
3	City	Abingdon	1165	17	
4	Country	Albania	236	28	
5	Email Type	E-Mail 2	4	8	
6	ID/Status	Accountant	15	30	
7	Industry	Automotive/Aerospace	20	24	

Import your data

The order that you import your data is important. You must load the parent (top) level modules first i.e. Accounts before Contacts.

You will need to follow the ZOHO instructions to import your data. The Import application is found in the Data Administration section of the Setup area.

- Go to the ZOHO Setup Page.**
- Select Import in the Data Migration Section.**
- Click the Other CRM option.**



Import Order

1. Users (ACT_USERS.CSV) import into Users
2. Accounts (ACCOUNT.CSV) import into Account Module
3. Contacts (CONTACT.CSV) import into Contact Module
4. Opportunities (OPPORTUNITY.CSV) import into Opportunity Module
5. Notes (NOTE.CSV) import into Notes Module
6. History (HISTORY.CSV) import into Task Module
7. Activities (ACTIVITY.CSV) import into Task Module
8. Secondary Contacts (SECONDARY_CONTACT.CSV) import into Contact Module

Depending on the complexity of your ACT! database, there are several extended options that can be imported – Account Relationships, Opportunity Line Items etc.. These files are found in the Auxiliary Tables folder. If you plan to use these files, you will need to consult the ZOHO documentation to migrate them.

ZOHO does not allow date/times to be imported that need TimeZone adjustments. Because each ACT! activity must be TZ adjusted, the event times may be incorrect if not adjusted on import.

Field Mapping

The ACT! Fields are named by the Exporter so that they will auto map to the ZOHO system fields. The field with an * are important because they create the relation between the Parent and Child records i.e. the Contacts and their Notes.

The following tables contain the standard fields. You will need to Map

User Module		
<i>From ACT! File</i>	<i>Map to ZOHO Field</i>	<i>Notes</i>
*User ID	User ID	The User table is a bit different than the data tables. The import inserts the ACT! ID which allows records to be associated to the proper user.
User_eMail	Email Address	
X_First_Name	First Name	
X_Last_Name	Last Name	
Created By ID	Created by ID	

If you have already added your users, make certain that the e-mail address in the input file matches the e-mail in the database. If it doesn't ZOHO will create an additional user.

Account Module		Contact Module	
<i>From ACT! File</i>	<i>Map to ZOHO Field</i>	<i>From ACT! File</i>	<i>Map to ZOHO Field</i>
*Account ID	Account ID	*Account ID	Account ID
Account Name	Account Name	*Contact ID	Contact ID
Account Owner ID	Account Owner ID	Contact Owner ID	Contact Owner ID
Billing City	Billing City	Created By ID	Created by ID
Billing Code	Billing Code	Created Time	Created Time
Billing Country	Billing Country	Date of Birth	Date of Birth
Billing State	Billing State	Department	Department
Billing Street	Billing Street	Email	Email
Created By ID	Created by ID	Fax	Fax
Created Time	Created Time	First Name	First Name
Modified By ID	Modified by ID	Home Phone	Home Phone
Modified Time	Modified Time	Last Name	Last Name
Phone	Phone	Mailing City	Mailing City
Shipping City	Shipping City	Mailing Zip (Code)	Mailing Zip
Shipping Code	Shipping Code	Mailing Country	Mailing Country
Shipping Country	Shipping Country	Mailing State	Mailing State
Billing State	Billing State	Mailing Street	Mailing Street
Shipping Street	Shipping Street	Modified By ID	Modified by ID
Website	Website	Modified Time	Modified Time
		Other City	Other City
Recommended User Added		Other Zip	Other Zip (Code)
ACT_LegacyID		Other Country	Other Country
		Other State	Other State
		Other Street	Other Street
		Phone	Phone
		Salutation	Salutation
		Title	Title
		Recommended User Added	
		ACT_LegacyID	

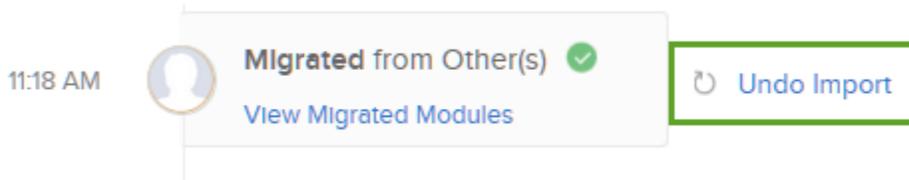
ACT! allows 3 address lines. ZOHO has only one. If you have used, the additional lines, you must add the fields to accommodate them.

Note Module		Task Module	
<i>From ACT! File</i>	<i>Map to ZOHO Field</i>	<i>From ACT! File</i>	<i>Map to ZOHO Field</i>
Created By ID	Created by ID	*Contact Name (ID)	Contact Name
Created Time	Created Time	Created By ID	Created by ID
Modified By ID	Modified by ID	Created Time	Created Time
Modified Time	Modified Time	Due Date	Due Date
Note Content	Note Content	Description	Description
Note Title	Note Title	Modified By ID	Modified by ID
*NoteID	Note ID	Modified Time	Modified Time
*ParentID	ParentID	Status	Status
		Subject	Subject
		Task ID	Task ID
		Task Owner ID	Task Owner ID

The Note Object does not allow you to add fields. If your Notes have Attachments and you are using the Dropbox link, you will need to import these Notes as History records.

Undoing an Import

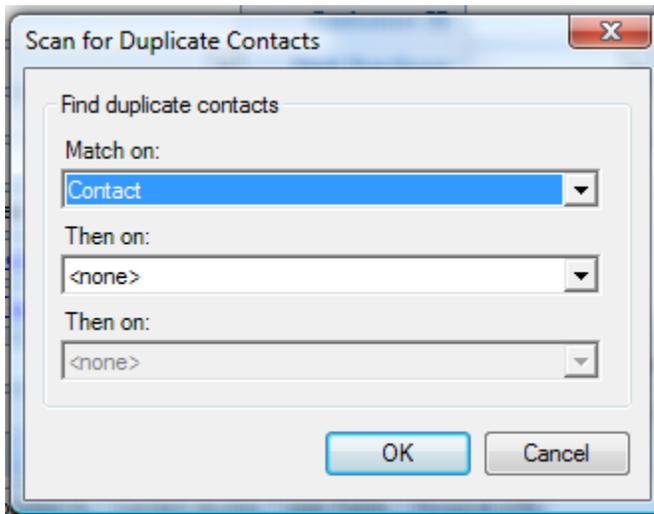
ZOHO has an Undo function if you find you have made an error with the import. You can undo up to 30 days after import. This is handy if you have made an error with mapping or relating records. This is done from the Import History. You can find the option by rolling your mouse over the import record. ZOHO seems to change the UI which sometimes makes it a bit difficult to find things.



ACT! Cleanup Tools

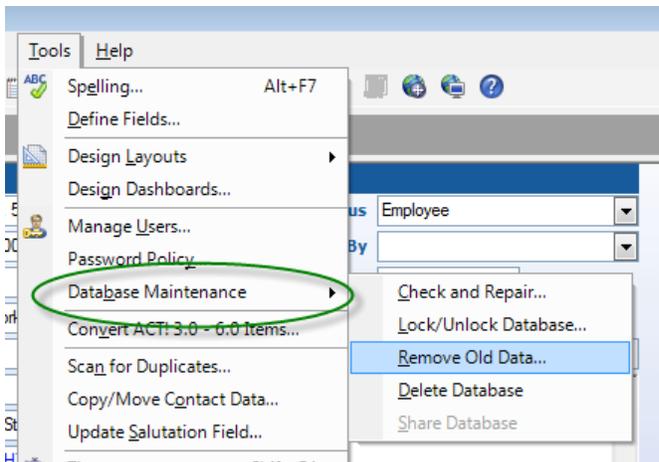
Finding Duplicates

ACT 2005+: You can use ACT! to find these records. To do this, select **Scan for Duplicates** from the **Tools** menu.



Remove the Old Data.

ACT! allows you to save a lot of “stuff” . Unfortunately, a lot the the “stuff” is really junk. So, you might want to take some time and get rid of the data that you will never use.



Remove Old Data ✕

To enhance performance, remove the data you no longer need.

If you want an archived copy of the data, you must back up the database before you begin.

Today's Date:

Remove from database

<input checked="" type="checkbox"/> Notes older than	<input type="text" value="360"/> days
<input checked="" type="checkbox"/> Histories older than	<input type="text" value="360"/> days
<input checked="" type="checkbox"/> Cleared activities older than	<input type="text" value="60"/> days
<input checked="" type="checkbox"/> Closed-Won and Closed-Lost Opportunities older than	<input type="text" value="60"/> days
<input checked="" type="checkbox"/> Open and Inactive Opportunities older than	<input type="text" value="60"/> days
<input checked="" type="checkbox"/> Document tab entries older than	<input type="text" value="0"/> days

Appendix B – How the differences are handled

There are many differences in structure between the ACT! and ZOHO databases. The following explains how the Exporter deals with these:

Account Assignment

ZOHO uses Accounts which are like ACT! Companies. It is generally considered best practice to have all Contacts assigned to an Account. Because ACT! has a ContactCentric structure, this often is not done. Therefore, the Exporter software will build Accounts using the rules below.

If a contact belongs to an ACT! Company, the account information for that contact will be taken from the ACT! Company data. The UniqueID for the Company will be placed in the AccountID field in the Contact.csv file. This will begin with the letter X.

If a contact does not belong to an ACT! Company and the Company Name is present in the contact's record, then this company name will be used to create a ZOHO account. All contacts with the same Company Name will be assigned to the created Account. The AccountID for Accounts created by the Exporter will begin the letter A. There are additional controls for building the Accounts available in the Custom Control tab.

If a contact does not belong to an ACT! Company and does not have a company name in the record, the contact will be assigned to a ZOHO Account called “*Not Given*”

Blank Contacts

If the Contact name is blank and there is a Company name, then the contact will be named Contact at *companyname*.

Account Addresses

ACT! Companies can have three address fields. ZOHO only has two. When ACT! company data is used to populate the ZOHO Account addresses the following rules are used:

If the ACT! Company Billing Address field is blank, the Address is moved to the ZOHO Billing Address.

If both the ACT! Company and billing addresses contain data, the ACT! Company address is put into a field which will need to be created labeled, ACT_Company_Address.

Groups

There are no groups in ZOHO. However, they can be simulated using ZOHO views. Exporter provides a field labeled Group Membership which contains a list of all the groups the contact belongs to. To use this in ZOHO, do the following:

1. On the Contacts home page, click the Create a New View option.
2. Give the view a name –e.g., the name of your ACT! Group
3. Specify the filter for the group
 - a. In the Field dropdown, select the Group Membership field.
 - b. In the Operator field, select *contains*
 - c. In the Value field, enter the name of the group.

Secondary Contacts (ACT! 2005+ only)

ZOHO does not have a similar function to ACT!'s secondary contacts. If you want to include secondary contacts, you will need to load them separately. Secondary contacts will be linked to their primary contact in ZOHO. You will see the primary ContactID in the Reporting To: field of ZOHO.