

September 2004

THIS MONTH:

Working with ACT! 2005

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Customizing Fields in ACT! 2005

Liz Hendon

ACT! Certified Consultant & ACT! Premier Trainer, MarkeTech Services

ACT! 2005 has many new enhancements in the area of field customization. Users with Administrative or Manager privileges may add, delete, or modify fields to customize these four program areas:

- ◆ Contact fields
- ◆ Company fields
- ◆ Groups fields
- ◆ Opportunity fields

All field customization begins by choosing **Tools | Define Fields** from your menu. The *Define Fields* dialog box will open, displaying a current database

field directory.

This dialog box also displays lists of available *Field Tasks* (such as creating, editing, and deleting fields), *List Tasks* for drop-down list management, and a *Field Details* box.

Drop-down lists are managed separately, and they may be created either before the field is created or after the field has been created. If the drop-down list is created after the field it's to be associated with, then the administrator or manager must go back and edit the field to include the drop-down list and associated attributes.

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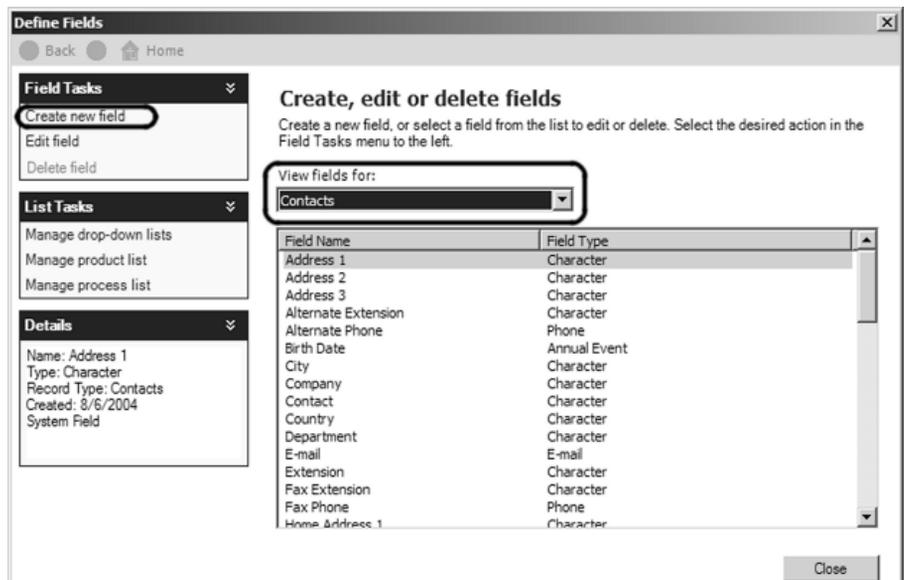


Figure 1. Create a new field.

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Customizing Fields...

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Creating a New Field

To create a new field in ACT! 2005, follow these steps:

- 1 Choose **Tools | Define Fields** from ACT!'s menu.
- 2 Select the type of field you'd like to create from the *View fields* for drop-

down list.

- 3 Click **Create new field** from the *Field Tasks* list (see **Figure 1**).

Assign a Field Name and Select the Field Type

Next, name your field. In the example shown in **Figure 2**, I've named my field "Sample Field." Now, choose a **Field data**

Continued on page 4

The screenshot shows a window titled "Define Fields" with a "Back" button and a "Home" icon. The main heading is "Enter field name and type". Below this, there is a text box for "Field name:" containing "Sample Field". Underneath is a dropdown menu for "Field data type:" set to "Character". A section titled "Customize field behavior" contains several checkboxes: "Allow Editing - Users are able to edit this field's value" (checked), "Allow Blank - This field can accept empty values" (checked), "Generate History - Track changes made to this field's value in history" (unchecked), "Primary Field - Copy this field when duplicating the record" (unchecked), and "Use drop-down list:" (unchecked) with a small dropdown menu. At the bottom are buttons for "< Back", "Next >", "Finish", and "Cancel".

Figure 2. Enter field name and type.

The screenshot shows the same "Define Fields" window, now on the "Customize field behavior" step. The heading is "Customize field behavior" with the instruction "Specify formats or rules for entering data in the field." There are three input fields: "Default value (optional):" (empty), "Field format (optional):" (empty), and "Field length:" (containing "50"). At the bottom are buttons for "< Back", "Next >", "Finish", and "Cancel".

Figure 3. Additional customization options.

Customizing Fields...

Continued from page 3

type. Available types include:

- ◆ Address (*New field type!*)
- ◆ Annual Event
- ◆ Character
- ◆ Currency
- ◆ Date
- ◆ Date/Time (*New field type!*)
- ◆ Decimal (*New field type!*)
- ◆ Email
- ◆ Initial Caps
- ◆ Lowercase
- ◆ Memo (*New field type!*)
- ◆ Number
- ◆ Phone
- ◆ Picture (*New field type!*)

- ◆ Time
- ◆ Uppercase
- ◆ URL Address
- ◆ Yes/No (*New field type! Checkbox field*)

Depending on the field type chosen, you may have the option to customize the behavior for your new field by checking on or off each of the following attributes:

- ◆ **Allow Editing** – Users are able to edit this field’s value.
- ◆ **Allow Blank** – This field can accept empty values.
- ◆ **Generate History** – Track changes made to this field in history.
- ◆ **Primary Field** – Copy this field when duplicating the record.
- ◆ **Use drop-down list** – I’ll cover this later in the article.

If the type of field you’ve chosen doesn’t allow for further customization, these options won’t be enabled for selection.

When finished, click **Next**.

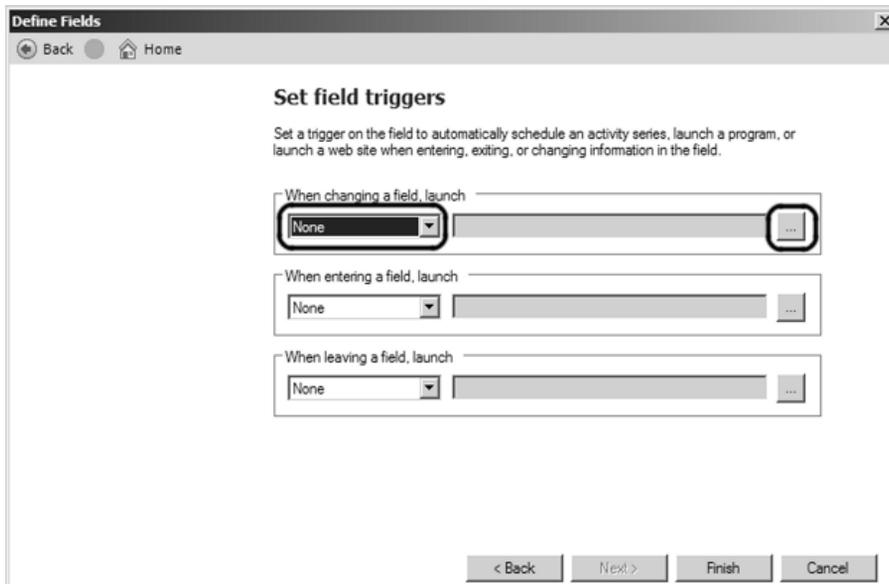


Figure 4. Select triggers.

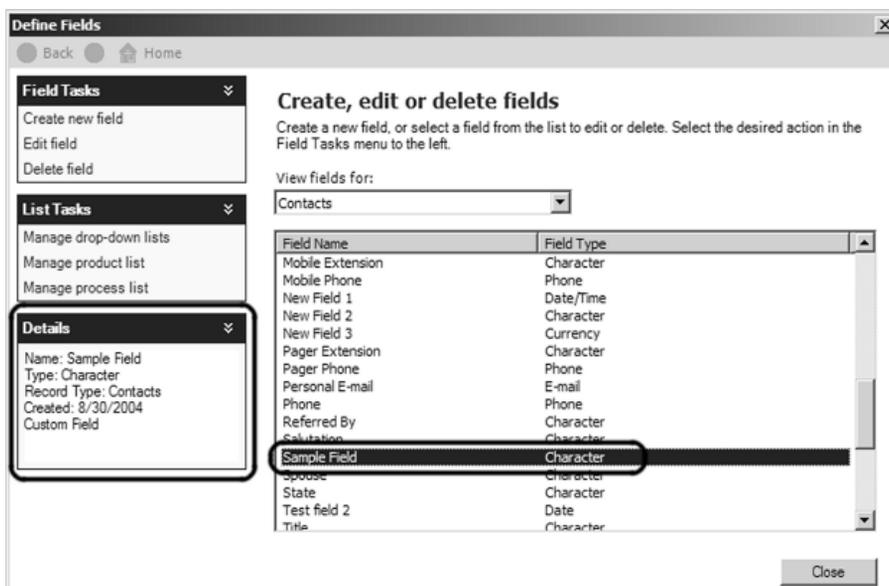


Figure 5. View your new field in the field list.

Define Field Values and Formats

You can further customize your new field’s behavior by setting a **Default value** (see Figure 3). If you choose to use this feature, all new contact records in the database will contain the designated value.

In addition, you may choose to define a **Field format**. For example, a field named “Social Security Number” might have a *Field format* of ###-##-####.

Finally, select a **Field length** to allow for the total number of characters accepted in a field.

Note: These options may not be available depending upon the type of field you’ve created.

Set Field Triggers

If you wish, you can trigger an activity series or launch a program whenever you click in or out of your field or change the field data. Choose the type of trigger you want and browse to find the file to launch it in this window (see [Figure 4](#)). Then, click **Finish**.

Viewing Your New Field in the Field List

Once you've successfully created and customized a new field, you'll see it displayed in the field list in the *Define Fields* dialog box. The field *Details* are displayed in the lower left corner of the screen (see [Figure 5](#)).

Click the **Close** button.

Create a Drop-down List for Your Field

As mentioned earlier, drop-down lists are created and managed separately from fields and may be created before the field is created, and applied with the rest of the new field attributes, or after the field has been created, and the field may be edited to create the association with the drop-down list. For this example, I'm creating the drop-down list after having created the field.

As always, to begin the process of field or drop-down list customization, choose **Tools | Define Fields** from your ACT! 2005 menu. Next, click **Manage drop-down lists** from the *List Tasks* box in the *Define Fields* dialog box.

You'll notice a directory of all the drop-down lists contained in the database. To create a new drop-down list, click **Create drop-down list** from the *Drop-down list tasks* box in the upper left corner of the screen (see [Figure 6](#)).

ACT! will prompt you to enter a name for your drop-down list. You'll also be

able to choose the type of data contained in your list, including character, currency, number, or decimal. Remember to choose a type that corresponds with the field you'll be associating the list with!

You may add an optional description for the list. You may also choose to allow users to edit the list, or to automatically

add new items that users enter to the list (see [Figure 7](#)). When you've made your selections, click **Next**.

The next dialog box will prompt you for the actual drop-down list values. These may be entered manually by clicking the **Add** button and then entering the value and, optionally, a description

Continued on page 6

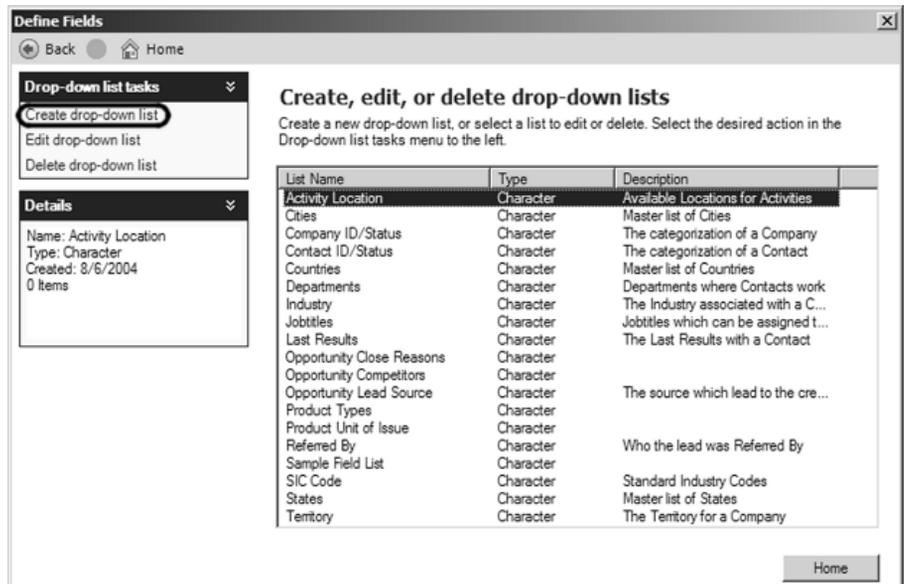


Figure 6. Drop-down list display.

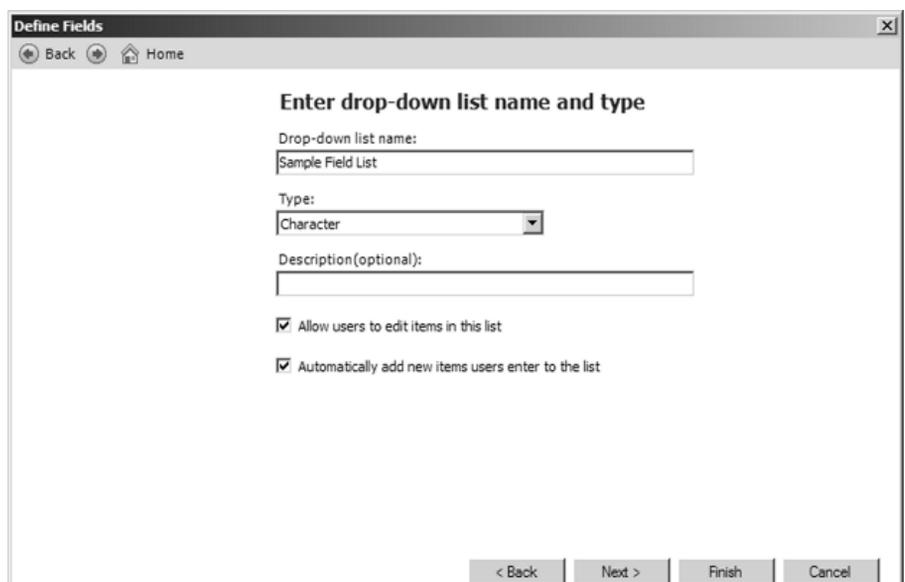


Figure 7. Enter drop-down list name and type.

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tion. Repeat the process until your list has been completed.

If you have a simple text file containing the values for your drop-down list, you may choose to import it rather than entering each value manually. To do this, click **Import drop-down list items** in the *List Tasks* box located in the upper left corner of the screen (see [Figure 8](#)).

When you have completed your drop-down list, either manually or via import, click the **Finish** button.

Assign a Drop-down List to an Existing Field

As always, for any field or drop-down list customization, start by selecting **Tools | Define Fields** from the menu. To assign a drop-down list to an existing field, select your field from the appropriate field type list. Then, click **Edit field** in the *Field Tasks* box (see [Figure 9](#)).

Now, select the **Use drop-down list** option, and click the down arrow on the field to select your drop-down list (see [Figure 10](#)). Then, click **Next**.

Once you've associated your drop-down list with your field, you can customize the manner in which the field and list work together, including:

- ◆ **Limit to List** — This allows users to select values from the drop-down

Continued on page 11

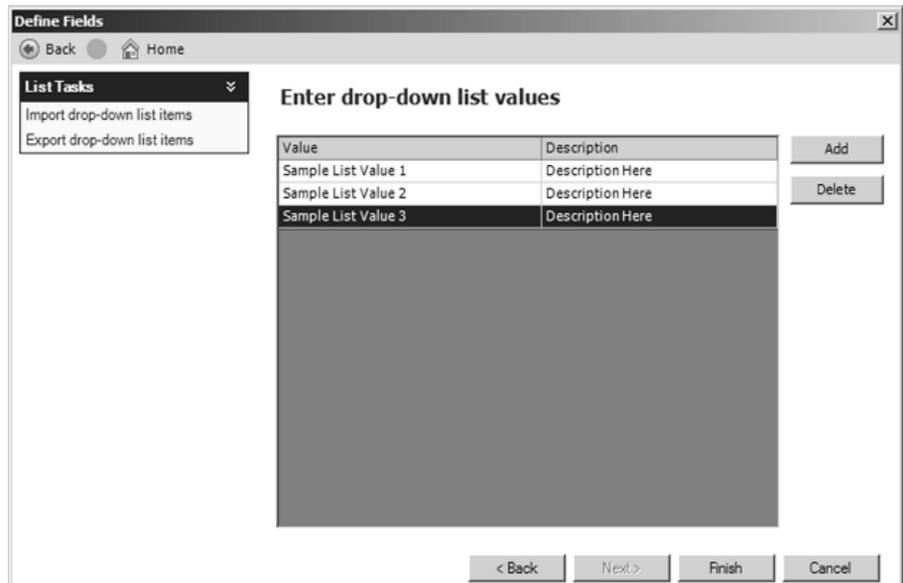


Figure 8. Enter drop-down list values.

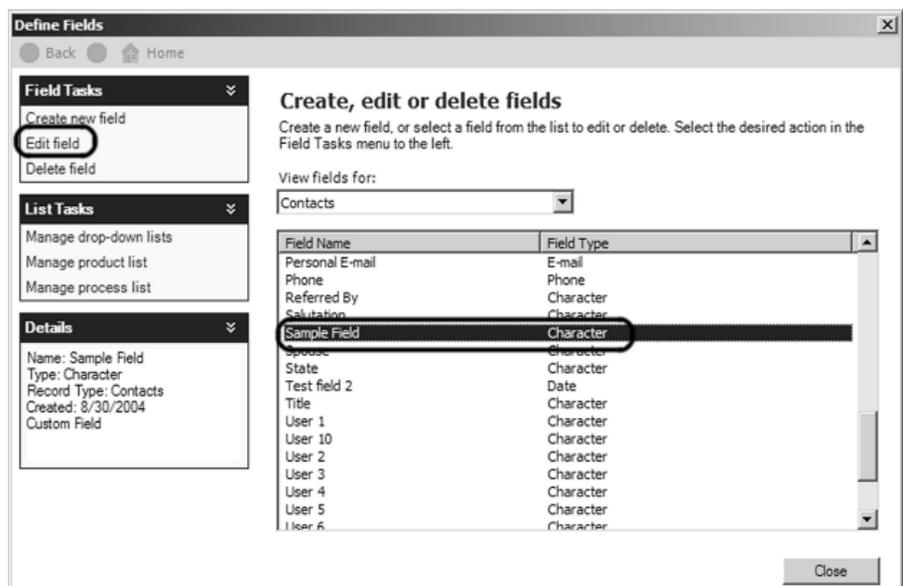


Figure 9. Select the field to edit.



Check out the ACT! Tools column on ACTExtra.com for the latest and best software tools that enhance ACT!.

Deciphering ACT7Diag – a Data Doctor’s Tool

Victoria Marechal

ACT! Certified Consultant, Marshall Associates, Los Angeles

Of all of the tools available with ACT!, Act7Diag is definitely “rabbit up your sleeve” magic. Because ACT! has been substantially redesigned in version 2005, so has this tool, formerly known as actdiag.exe. Old familiar capabilities like Reindex Database are accessible from both ACT! Tools | Database Management and ACT7Diag. Plus, ACT7Diag contains many new tools. It’s so sharp you’ll feel like a doctor who’s been handed a laser scalpel.

Act7Diag will help you to be a good database diagnostician when troubleshooting becomes necessary. This article is written to jumpstart administrators and acclimate serious ACT! users with the ACT7Diag tools set. If you have any hesitation about using these sharp instruments, you can call your local Certified Consultant. The intent here is to give you an overview of the scope of ACT7Diag, not a step-by-step how-to. To increase your understanding of the range of tools and reports, read on. This set of utilities will allow you to operate with surgical precision, almost painlessly.

For those of you who are already familiar with this tool in earlier versions, you know it’s accessed through the Windows Start menu. Click on **Start | Run** and type in **ACT7Diag**.

One noticeable element of actdiag that’s missing in ACT7Diag is the User Report. Therefore, database administrators should keep careful records of users and their respective settings. You can

access a list of users within ACT! with an Advanced Lookup where you can see and print out the listing. However, you won’t find user security settings, logon access, synchronization permissions, team assignments, active or inactive designation, or other user settings. It remains to be seen whether this will be remedied by Best Software or an add-on SDK developer. At press time there was no party stepping forward to confirm intent to fill this need.

Server Information

Server Information describes the native settings of the particular “instance” (see **Figure 1**). Frequently, ACT7Diag refers to an “instance.” An instance (or installation) of Microsoft SQL Server 2000

is composed of four system databases (master, model, msdb, and tempdb) and as many user databases as have been created. The Server Information includes the server name, SQL edition, version, and collation (language lookup settings defaulting to Latin — case-insensitive and accent-sensitive—for English). This information is helpful to identify facts relevant to the particular workstation and assist in troubleshooting network connectivity issues.

Server Security

Under **Server Security**, you can perform actions such as resetting the SQL SA password and adjusting your network settings.

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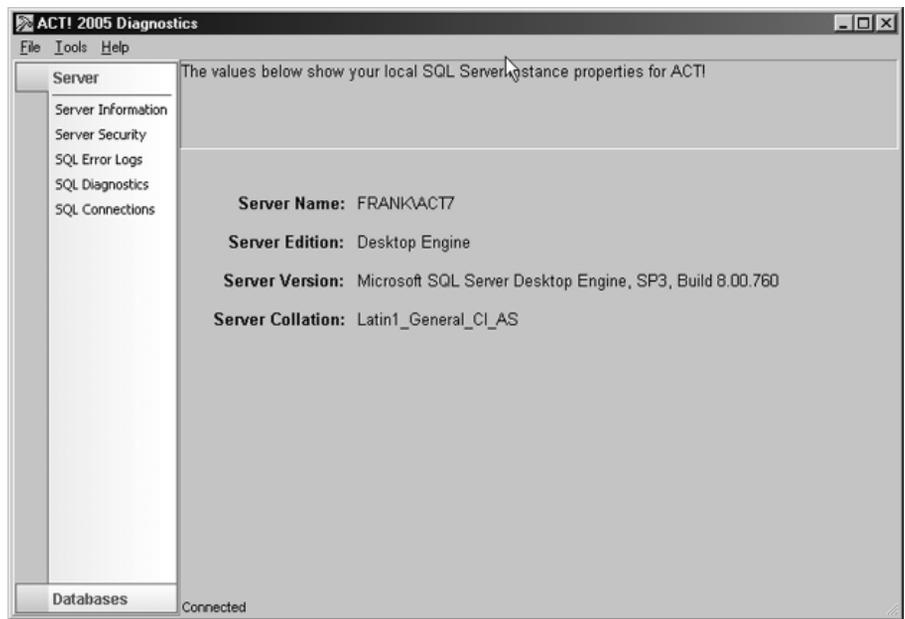


Figure 1. When you enter ACT7Diag, the default window shows Server Information.

Deciphering ACT7Diag...

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Reset SQL Password

This utility will reset the SQL Systems Administrator password of the local workstation/server (see [Figure 2](#)). This refreshes the SQL SA password, which could be the cause of difficulties if ACT! isn't running properly in conjunction with the parental SQL database structures. This isn't an exposed user interface password but a key code type of password.

Note the warning: "This will force a closing of this application and possibly others!" — ACT!'s punctuation, not mine. And just as an aside, this exclamation mark seems to be this software's signature. Or perhaps there's an ACT! Fanatic on the loose! Getting back on track, now might be a good time to close your ACT! database.

Change Network Settings

Both ACT! 2005 and Premium for Workgroups open a network port by default. A specific port number has been dynamically established. To close the network port, you remove the checkmark and close

ACT!. If you want to change the TCP/IP port number, this is the place (see [Figure 3](#)). Or, force a dynamic port reallocation by just setting the TCP port to zero (0). It's recommended to close and restart ACT! for this to take effect. For safety's sake you might as well reboot too.

SQL Error Logs

Export, conversion, and symptomatic events relevant to local ACT! database actions are stored in Program Files/

Microsoft SQL Server/MSSQL\$ACT7. Six ERRORLOGs are retained, numerically ordered, with the lowest number the most recent (see [Figure 4](#)). This shows basic information regarding the SQL database engine. It will show the last SQL shutdown as well as other high-level information. Use this for troubleshooting port, network, and attachment issues. If your database has been identified by SQL as "suspect," this report will help diagnose the problem.

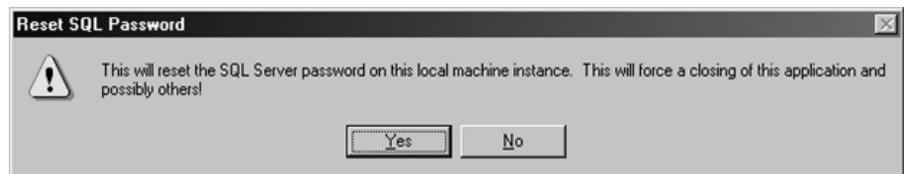


Figure 2. Resetting the SQL password.

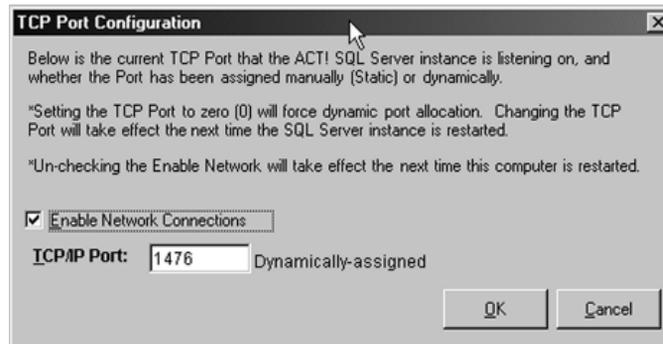


Figure 3. Network TCP/IP port configuration.

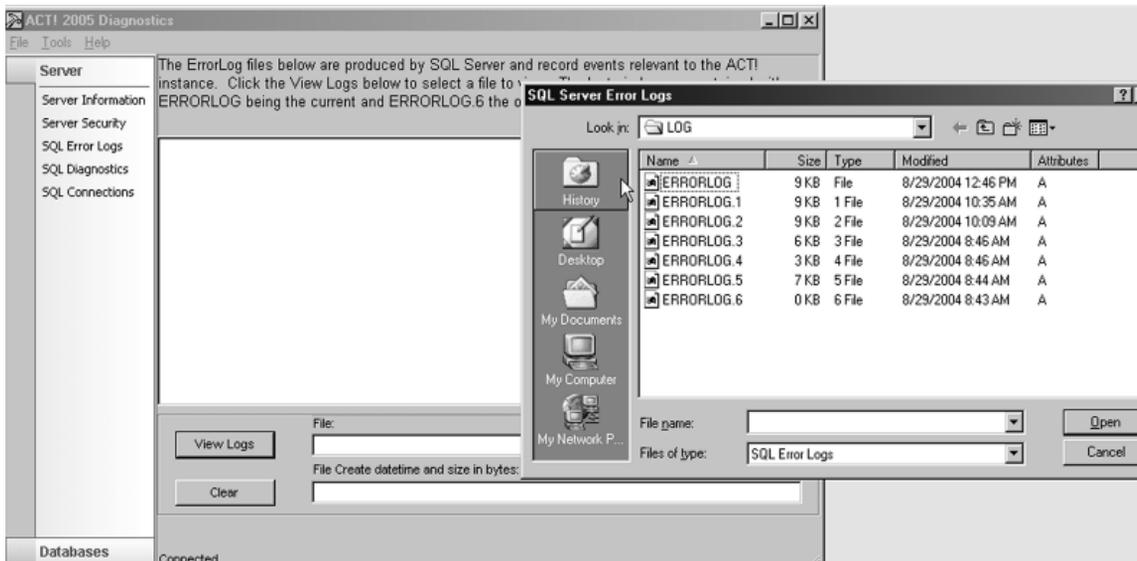


Figure 4. Access and View error logs.

SQL Diagnostics

To use this tool, Run SQLDiag, close the server instance. This diagnostic is designed to deliver a full system and SQL Server report (see [Figure 5](#)). This is a big, extensive, machine-wide, detailed report that encompasses SQL and MSDE repair logs, including fixes of orphaned users plus listening settings, Registry settings, library settings, DLL levels, network hardware connections, IP connections, and startup programs. Everything is here, I think, except your kitchen sink.

SQL Connections

This identifies databases operating under the aegis of SQL. Date particulars like login and last activity are shown as well as Disk I/O and Blocked status (see [Figure 6](#)). Table locks will show if a connection is running or finished.

Databases

At first I didn't see the Database navigation bar on the lower left. But boy am I glad I found it. Clicking on this box invokes a broad range of database diagnostic tools. By default the Database List appears.

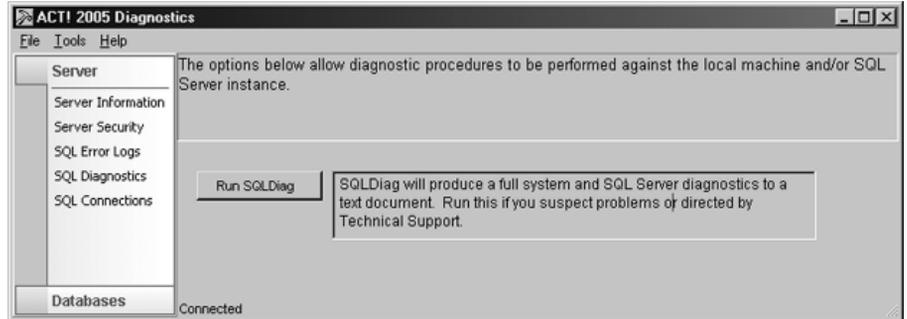


Figure 5. Run SQLDiag.

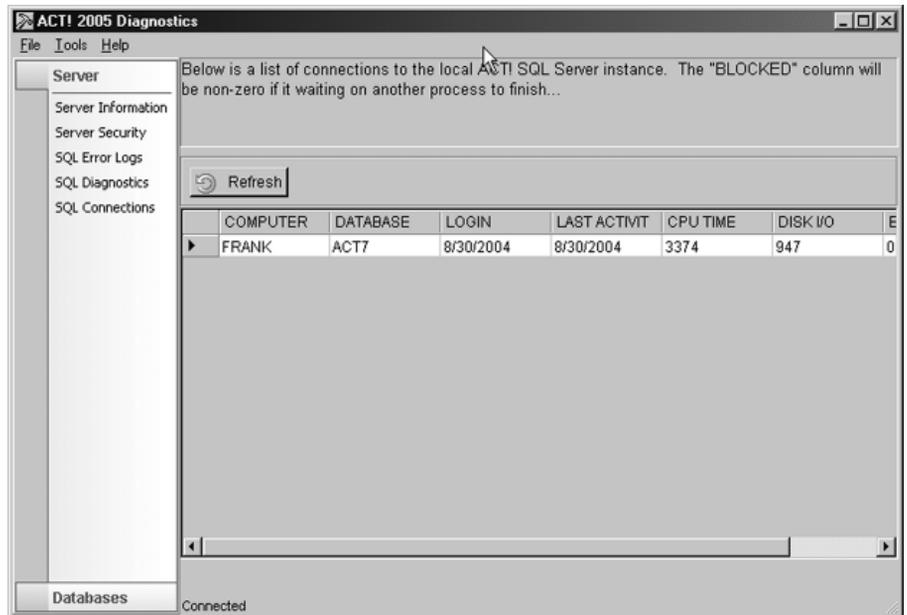
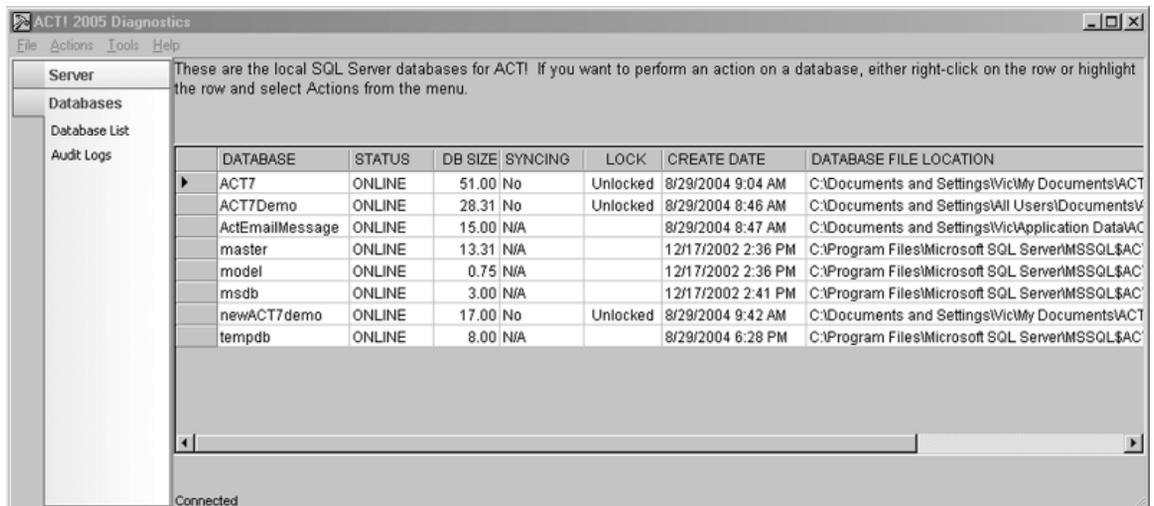


Figure 6. SQL Connection listing.

Figure 7. Local SQL Server list.



Deciphering ACT7Diag...

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Database List

This screen shows the SQL Server databases (see [Figure 7](#)). These are databases created by SQL Server in order to manage your databases. That's right, databases to manage your databases. Plus, there are some created by ACT! — these are ACT7Demo, ActEmailMessageStore, master, model, msdb, tempdb, and whatever ACT! databases you've added.

This is where you'll find a mother lode of database tools (see [Figure 8](#)). You can check, repair, reindex, delete, rebuild, and more using various methods. There are a couple of ways to access the database tools. Highlight a database and right-click to invoke the menu. Or use the **Actions** drop-down menu on the Windows title bar. Keep in mind that some of these tools use the last opened database and don't have a user interface to specify a database.

Check Database — This simply checks your database. Once finished, it confirms that it's been changed.

Repair Database — Upon checking my databases, this tool reported no problems. It's good to know this is here in case of a problem.

Unlock Database — Use this when you know you have a correct logon but it doesn't open your database.

Detach Database — This is a tool to disconnect a particular database from the SQL instance.

Delete Database — If you've tried to repair a database and it has been marked "suspect" by SQL, this handy tool will allow you to properly remove it and the link with SQL. This will not delete your attachments.

Database Structure — This delivers a text report on field level attributes and statistics subtotaled by table. This would include contacts, secondary contacts, companies, groups, and opportunities (stage, products, and so on).

Database Rebuild — Here you have a number of options:

- ◆ **Rebuild Schema** — This will recreate database structures like tables, fields, triggers, and stored procedures, but the data isn't affected.
- ◆ **Security** — This rebuilds all of the security permissions, proper security connectivity, and limits to contact access (a feature available with Premium only).
- ◆ **OLE/DB Report Objects** — This regenerates read-only objects for reporting views.
- ◆ **Rebuild Sync Objects** — This tool disconnects all current database connections. It will rebuild the synchronization sets.

Database Fixes | Groups & Companies | Recover Group — This rounds out the complement of database-oriented fixes by using DBFix to recover ACT! system owned groups and companies.

Audit Logs

History for a number of SQL actions regarding the last opened database is reported. From jobs performed by user, on either a shared or unshared database, to check and repair information, it reports all of this plus other database-specific actions

Tools

Notice the **Tools** drop-down menu (see [Figure 9](#)) — it offers only a few utilities, but they're very important.

Adjust ACT! Timeout Values

If you're dealing with slower hardware or extremely large databases, this tool will optimize data traffic and commands. If, for instance, you're trying to convert a 6.0 database and you receive a timeout error message that halts the conversion, you would want to use this adjustment. Keep in mind the possibility of other data problems if adjusting the timeout values doesn't resolve the issue. These values, shown in seconds, are adjustable to over 10,000 seconds (about three hours). It may be wise to incrementally increase these settings rather than jack them up to the max.

Database Command Time Out Default — If a default command hasn't executed within 30 seconds (the default setting), you may receive an error message. Use this to allow more time (in seconds) to perform a task before ACT! determines that an error has occurred. Try increasing it to 120 seconds (two minutes).

Database Connection Time Out Default — Utilize this if you've received a "timeout" error message related to a data transfer between bases. This setting will allow more time for a database to connect with another data warehouse before ACT! thinks it's time to throw in the towel. The default setting is again 30 seconds. It's been suggested to extend it to 900 seconds (15 minutes).

Database Command Time Out Long — For file import, export, conversion, synchronization, and save as, this adjustment will permit you to expand the meter to finish the task before concluding that an error has occurred and

Figure 8.
Fix Database
main menu.

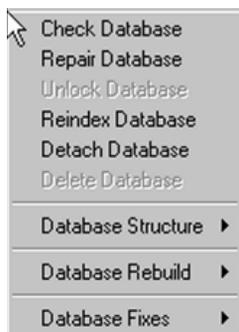


Figure 9.
The Tools menu.

delivering an error message. The default in ACT! is 3,600 seconds (one hour), while the maximum is greater than 10,000.

Delete Preferences

This instrument will delete any customized menus and commands. In addition, it will reset all local preferences to their defaults. Close ACT! before you run it.

Conclusion

Keep in mind that ACT7Diag, like its predecessor, is hidden within the ACT! program files. Remember, you can only invoke it from the Windows Start button. Since ACT7Diag is amazingly helpful, there will be no need to panic if you have to troubleshoot ACT!.

That's it — ACT7Diag from start to finish. While it's an extremely help-

ful tool, it offers no guarantees to fix all problems. However, rumors have started in the data hospital that it actually improves the physician's bedside manner. ♦

Victoria Marechal is an ACT! Certified Consultant and frequent contributing writer to ACT! Extra. She has 11 years of expertise with ACT! and is based in Los Angeles, CA. marshallagency@netscape.net.

Customizing Fields...

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list only.

- ◆ **Allow Multi-select** — This allows the user to select multiple values from the list. (It creates a checkbox drop-down list!)
- ◆ **Show Descriptions** — This displays description text along with list values.
- ◆ **Enable Type-ahead** — Select this so that as the user types, list values are displayed based on the entered value.

After you've made your selections, click **Finish** (see [Figure 11](#)). Then, simply close the *Define Fields* dialog box.

Remember, after creating and modifying your fields, you'll need to read *ACT! Extra* to learn how to add them to your layouts! ♦

Liz Hendon, an ACT! Certified Consultant and ACT! Premier Trainer, is the President of MarkeTech Services (www.marketechservices.com). Her firm specializes in providing ACT! training to companies and individuals.

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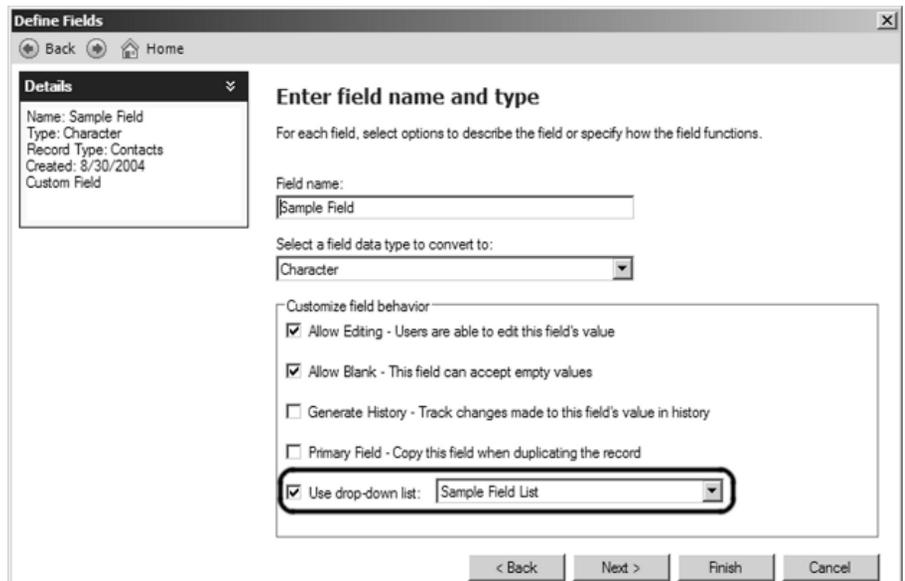


Figure 10. Select the drop-down list.

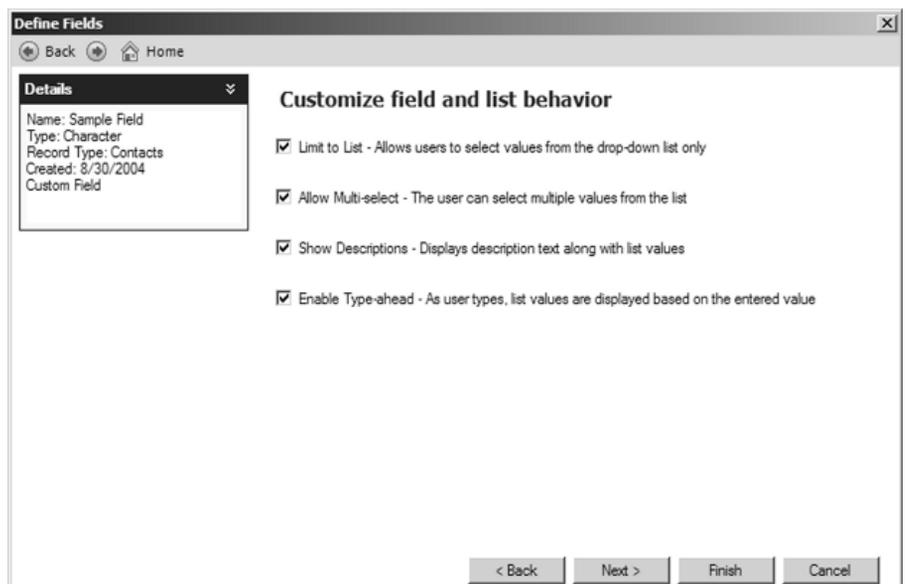


Figure 11. Select your list behavior.

Cool Tools: New Products for ACT! 2005

► AppsAnywhere — Always connected to ACT!, by Go-Web.biz

You can run all versions of ACT! and other applications (for instance, Microsoft Office Suite) from anywhere by using AppsAnywhere. It runs ACT! in 100% native mode via your Web browser. You can also run add-ons like Address Grabber. No other Web software is needed. Significantly less expensive than Windows Terminal Services or Citrix Mainframe. With AppsAnywhere, your 32-bit applications need not be installed on client computers. Use older computers and any Windows Operating System on client machines. Also supports Mac, Linux, or UNIX clients. **703-330-1026 X44**, www.Go-Web.biz. **Internet/Remote Access**

► BusinessMAP 3.5, by ESRI

ESRI's BusinessMAP 3.5 with new link supports ACT! 2005 (and other versions). BusinessMAP is an affordable, easy-to-use mapping solution that transforms database information from ACT! into meaningful custom maps useful for making better business decisions. Launch BusinessMAP directly from ACT! to map an entire database, selected group, company contacts, or the current Lookup. Once contacts are mapped, users can perform geographic queries such as finding all contacts within a 25-mile radius, get driving directions, analyze sales, and more. Query results can be returned to ACT! as a group for mail merges or other activities. **800-465-8971**, www.esri.com/businessmap. **Mapping**

► CompanionLink Professional, by CompanionLink Software

Fast and easy, two-way synchronization for your PDA or Smart Phone and ACT! 2005. CompanionLink supports

ACT! 2005 features like Additional contacts, dynamic Groups, and multiple Attendees. Synchronize to any Palm OS device, any Pocket PC device. CompanionLink Software, Inc., has been supporting ACT! and PDA synchronization longer, and with more features, than any competing product. If you need a reliable, fast, and detailed synchronization solution, CompanionLink delivers. \$79.95. Download a 15-day free trial. Fully compatible with ACT! 6.0 and ACT! 2005. **Sales 800-386-1623**, www.companionlink.com. **Handheld | PDA**

► FaxAdmin, by ASDS Computer

FaxAdmin is a fax utility that lets you fax to your ACT! contacts from right within ACT! 2005. Taking advantage of WinFax and MS Fax technology, FaxAdmin lets you easily write letters and send via fax, fax out cover pages, and do mail merges and fax. The product requires the use of WinFax 10.03 or MS Fax. Price \$79.00. Trial version available. **888-202-3573**, www.asdscomputer.com/products/faxadmin.htm. **Faxing**

► InfoOptics — Universal Data Translator, by Information Optics

Seamlessly integrates your ACT! Contacts, Groups, Activities, Notes, Histories, and Opportunities with nearly any other data source including MS-Access, MS-SQL, QuickBooks, Calyx Point, and ODBC. InfoOptics is bi-directional and relational. **856-489-3737**, www.InfoOptics.com. **Import | Export | Synchronization**

► MedleyAdmin, by ASDS Computer

MedleyAdmin offers improvements for groups, companies, lookups, layout design, contact security access, tree

views, and much more for ACT! 2005. It includes: a Personal Dashboard to show critical daily items, Group and Company Tree Views/Calendar Views, multi-group lookups, including who is not in a group, a lookup and mass update of who has access to contacts (ACT! 2005 Premium), ZIP Code entry that creates city and state, and custom controls for enhanced layouts, pictures, tabs within tabs. Price \$99.00. Trial version available. **888-202-3573**, www.asdscomputer.com/products/medleyadmin.htm. **Utilities**

► MigrateAdmin, by ASDS Computer

MigrateAdmin converts GoldMine 6.0/6.2/6.5 databases into ACT! 2005. This wizard-based application converts all basic contact data, custom fields, histories, notes, activities, and sales data. It includes the ability to mass update Contact Security Access for ACT! 2005 Premium users. Price \$299.00. **888-202-3573**, www.asdscomputer.com/products/migrateadmin.htm. **Conversions**

► SwiftPage Email, by Summit 5

SwiftPage Email is the first online e-mail system for marketing and sales that is fully integrated into ACT!. Send to 1 or 1,000 e-mail addresses at once without using your ISP or tying up your network. You know who opened the e-mail and what they clicked on. Works with ACT! V5/2000/V6 and ACT! 2005. SwiftPage Email — \$29.95 for unlimited e-mail (maximum of 1,000 sent at one time). SwiftPage Email for Workgroups — \$79.95 for three users for unlimited e-mail (maximum of 5,000 sent at one time), \$19.95 for each additional user for unlimited e-mail (maximum of 1,000 sent at one time). Trial version available online. **877-228-8377**, www.SwiftPageEmail.com. **Email Marketing**

Preparing to Convert Your ACT! 5 or 6 Database to ACT! 2005

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If you're upgrading from a previous version of ACT!, you'll need to convert that "old" database so that it's functional in ACT! 2005. The application comes with a conversion wizard that will walk you through converting your database and other files, like templates and layouts. But while the wizard will take you through the steps to convert your old database to the new format, there are some important considerations to take into account before you convert. In this article, I'll focus on preparing to convert your old databases.

The recommendations in this article are for converting from ACT! 6.0 to ACT! 2005, but most of the information will apply to ACT! 5.0 databases as well. I'm going to suggest steps for you to take to make sure that your conversion goes as smoothly as possible, but I'm not going to detail what's involved in each action, mostly for space considerations — this is an article, not a book! In almost all instances you can find detailed instructions and information on the ACT! Web site, in the Knowledge Center. Go to www.act.com/support/technicalsupport/index.cfm, choose your product version, such as ACT! 6.0, and enter the keywords.

A note on converting: You can't go home again. Once you convert your database from a previous version of ACT! to ACT! 2005, there's no going back. ACT! 2005 is built on an entirely new and different code base from previous versions, and is now SQL-based. This means we get a whole bunch of new functionality, like

Company Records, but it also means that you cannot save an ACT! 2005 database to a previous version. You can run both ACT! 2005 and a previous version simultaneously, though. This means that you can convert your database to ACT! 2005 and still open the old version at the same time. This will make it easier to validate the conversion process.

Conversion Fast Track: If you can answer "True" to all of the following statements, you can skip most of the steps below and go right to Step 22. If you answer "False" to any of these statements, you should follow each step closely.

True or False:

- ◆ You're on a single user database. This means that you, and only you, use your current ACT! database.
- ◆ You have not customized any of the fields in your database.
- ◆ You have not customized any of the templates (document, envelope, labels).
- ◆ You have not customized any of the reports.
- ◆ You are not using the Library tab in ACT! 6.0.
- ◆ You have not created any Activity Series.
- ◆ You do not keep any data in SideACT!.

Here are the steps you need to take to effectively prepare for conversion:

1 If you have synchronization set up between a main database and any remote databases, you should first do a final synchronization from all remote databases to the main.

2 If you sync your Pocket PC or Palm PDA device with your ACT! database, you should do a final synchronization from that device.

3 Attachments — Identify all attachments and their locations. Attachments by default are stored in the My Documents/ACT/Document location. If you have attachments for multiple users stored in that local location, you'll need to move all of the attachments to a central location on a server, and then purchase and run the ACT! Attachment Migration Wizard, which costs \$29.95. You can purchase this tool at www.actaddons.com/products/attachment.asp, and an ACT! Knowledge Center article about using the tool is available at <http://itdomino.act.com/act.nsf/docid/2001112133927>.

4 Custom dictionary files — If you've customized the ACT! spelling dictionary, you'll have a custom dictionary file. You'll need to identify and locate that file, make a note of the location, and follow a procedure after converting to ACT! 2005 to convert just that file. An ACT! Knowledge Center article that details how to find these files, and how to convert them to ACT! 2005, is available at <http://itdomino.act.com/act.nsf/docid/200472163242>.

5 Review Library tab — This is applicable only to ACT! 6.0. If you use the Library tab and have selected the *Display* feature for all contacts, you won't have that ability in ACT! 2005. The *Display for all Contacts* feature wasn't included

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as a feature in the ACT! 2005 program. Documents must now be attached to each contact record manually. You'll need to identify those documents and the contacts that you want to have each document attached to, and manually attach the document to each contact.

6 Groups — You should clean up all groups, getting rid of any old, unused groups. If you've been using Groups to manage companies in earlier versions of ACT!, I recommend changing the Group Name in your current version to "Company – GroupName". This will make it much easier after conversion to identify those Company Groups and convert them to Company records in ACT! 2005.

7 Custom reports — There's a known issue with converting and using reports that have a large number of fields in the report. Depending on your available system resources, it's recommended that the total number of fields in an ACT! report be kept below 500. I know, 500 seems like a lot, and most people don't even have 500 fields in their database. If you suspect you have a monster report with an insane number of fields on it, you'll need to edit the report in your old version of ACT! and remove as many fields as possible. An ACT! Knowledge Center article that tells you how to edit your report template in ACT! 5.0 or ACT! 6.0 is available at <http://itdomino.act.com/act.nsf/docid/199752073343>.

8 Templates — I recommend reviewing all of the templates, especially the templates you may have customized or created, and determining which templates you need to keep and convert. Delete all old templates that you aren't using. There's also a known issue if you've used an elliptical shape in any template. These are shapes with curved lines, like an oval.

The ACT! 2005 report/label/envelope generator no longer supports these elliptical (curved line) shapes. You'll have to create a new non-elliptical shape for the template. If you're asking yourself "How the heck would I even add an elliptical shape to an ACT! 5.0 or 6.0 template?" you probably don't have to worry about this issue.

9 Data cleanup — Now is the time to go through your database and clean up all your data. You can technically convert all of your data, but if you're going through all of these preparation steps, I recommend that you go one step further and "clean house" from a data perspective. Now is the time to delete old, incorrect, inactive, or blank contacts. Think of it as spring cleaning for your database. You might want to consider purchasing the ACT! Data Clean-up Wizard, which costs \$29.95. This wizard will selectively remove data from your database, giving you the ability to clean up data using very specific criteria. You can filter data by date range, selected user or users, or individual data type. You'll find the product information at www.actaddons.com/products/datacleanupwiz.asp.

10 Clear activities — This is an issue that many ACT! users are unaware of, and one that can cause serious problems in your ACT! database. If you schedule activities (calls, meetings, or to-do's), you must clear those activities on a regular basis. Uncleared activities over time can cause corruption in your activities table, and that can lead to a corrupt or damaged database. To see how many activities you have in your ACT! 6.0 database, go to the **Task List**. In the **Filter** area at the top, make sure you have selected **All Types**, **All Priorities**, and **All dates**. De-select **Show only timeless** and **Show cleared activities**. Click the **Select Users** button and choose the radio button for **All users**. Now look at the

bottom of your screen; it will tell you the total number of activities. If this is more than 300, or if they date back over a year, you need to start clearing. You can clear multiple activities at once; an ACT! Knowledge Center article that tells you how to do that is available at <http://itdomino.act.com/act.nsf/docid/1998313113623>.

Or, you can use the ACT! Data Clean-up Wizard, which will clean up Uncleared activities en masse. You have the option to select uncleared calls, meetings, and to-do's separately.

11 Purge cleared activities — This is the corollary activity to Step 10. The other side of this coin is that unpurged, cleared activities can also wreak havoc in your database. To see how many unpurged, cleared activities you have, go back to the **Task List**. In the **Filter** area at the top, make sure you have selected **All Types**, **All Priorities**, and **All dates**. De-select **Show only timeless**, but this time select **Show cleared activities**. Click the **Select Users** button and choose the radio button for **All users**. Now look at the bottom of your screen; it will tell you the total number of activities. Subtract the uncleared activities from the previous step, and you'll get the total number of cleared, unpurged activities. To keep your database happy and healthy, I recommend that you keep the number of cleared activities to less than 600, total, for all users. Note that you don't lose any data when you purge these cleared activities; the history of the cleared activity will still be on the Notes/History tab. An ACT! Knowledge Center article that tells you how to purge cleared activities is available at <http://itdomino.act.com/act.nsf/docid/20012157455>.

12 Document Activity Series — If you use the Activity Series feature in ACT! 5.0 or 6.0, you'll need to document the

series and the steps in each series, and you'll have to re-create these in ACT! 2005. The bad news is that the series don't convert from earlier versions of ACT!. The good news is that the new Activity Series functionality in ACT! 2005 is vastly improved.

13 *Review all fields with drop-downs for potentially corrupt drop-down items* — Drop-downs items in ACT! 5.0 and 6.0 can get corrupted. If you convert your database without checking for these lurking corruptions, you'll get a nasty error in ACT! 2005: "Conversion had be halted with the following message: External component has thrown an exception." Throwing exceptions! Yikes. Luckily there's a relatively easy way to check for and repair corrupt drop-downs in ACT! 6.0; there's an ACT! Knowledge Center article that tells you how to do it at <http://itdomino.act.com/act.nsf/docid/2004825113020>.

14 *Purge other data* — I recommend purging old data periodically. You can do this from the **File** pull-down menu: Select **Administration** and then **Database Maintenance**. Then click on the **Data Clean-up** tab. You can remove Notes, Histories, Attachments, Cleared activities, and Sales data based on a certain number of days old. If that all-or-nothing approach scares you, I recommend an add-on product called History CleanUp, which costs \$39. This product lets you choose the Before Date, the After Date, which type or types of history to remove, which user(s) created them, and which fields' Field Changes to remove. It lets you choose whether to remove them for the entire database, or only the current contact or contact lookup, or only the current group or group lookup. You'll find the product information at www.actaddons.com/products/historycleanup.asp.

15 *Clean up user list* — You can find

the list of users from the **File** pull-down menu: Select **Administration** and then **Define Users**. You might not want to delete old users, though. When you delete a user, ACT! will prompt you to either delete that user's records (gasp, no!) or reassign them to another user. Sounds good, but there's a catch: If you reassign, it reassigns everything, including all notes, histories, and activities as well as contact records. If you don't want to see the actual user names of old users, I recommend creating a user record for "Past Employee" and reassigning deleted user records to that user. There's an ACT! Knowledge Center article that tells you how to manage users available at <http://itdomino.act.com/act.nsf/docid/200281471831>.

16 *Log in as each user* — You need to make sure that each user defined in the database has a valid My Record associated with it. When you log in as a user with no My Record association, you'll be prompted to create one. I recommend that you first make sure each user has a contact record, and then, when prompted to associate the user record with the My Record, you can click the **Select** button and choose the user's contact record from the list of contacts in the database. An ACT! Knowledge Center article that tells you how to manage users is available at <http://itdomino.act.com/act.nsf/docid/200281471831>.

17 *Move SideACT! data to ACT!* — There's no SideACT! for ACT! 2005. At all. If you use and love SideACT!, I can put you in touch with a support group of folks who will be likewise grieving the loss of this lovable but quirky little applet. What you need to do is open all of your SideACT! files and transfer any items you want to keep into ACT! 6.0. If you're asking yourself "What the heck is SideACT!?" you can skip to Step 18.

18 *Make note of any macros* — There are

no macros for ACT! 2005. At all. If you use and love macros, you can continue to use them, but you'll need a third-party macros application. You can use Macro Express for \$39.95; you'll find the product information at www.macros.com. If you're asking yourself "What the heck is a macro?" you can skip to Step 19.

19 *Review field structure* — In ACT! 6.0 you can get a report of all of your fields, including any custom fields, from ACTDIAG in Microsoft Excel format. An ACT! Knowledge Center article that tells you all about ACTDIAG, including how to run the Field Structure to Excel Report, is available at <http://itdomino.act.com/act.nsf/docid/2000020710185201>.

You need to review the list of fields, and keep this report for comparing a similar report in ACT! 2005.

20 *Rename secondary e-mail fields* — If in that list of fields in Excel from Step 19 you've created a secondary e-mail address field and called it "E-mail" or "E-mail 2" or "E-mail anything," then you'll need to rename those fields in ACT! 6.0. If you don't and you try to convert your database, you'll get this error: "Conversion has been halted with the following message: The descriptor name E-Mail 2 is already in use and cannot be applied." An ACT! Knowledge Center article that tells you how to rename those fields is available at <http://itdomino.act.com/act.nsf/docid/200263135051>. I recommend you use a name that doesn't start with "E-mail" and *do not* just delete the field. Deleting fields in ACT! 5.0 or 6.0 can cause serious issues with your database. You'll find an ACT! Knowledge Center article that has some great tips on adding and modifying fields at <http://itdomino.act.com/act.nsf/docid/2001813155752>.

21 *Change Group fields to Character*

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only — This is the only type of Group field that will convert to ACT! 2005. You can refer back to that handy Microsoft Excel Field Structure Report we ran from ACTDIAG in Step 19. This will list the Group fields, and what type they all are. Note: In ACTDIAG's report, it will list fields with the type of Character as String. An ACT! Knowledge Center article that tells you how to change the type for Group fields is available at <http://itdomino.act.com/act.nsf/docid/2001813155752>.

If you don't do this step, you'll get the following error message when converting: "Specified cast is not valid." Specified cast? Hmm, best to just avoid this.

22 *Back up your database* — Before moving to the next step, it's a really good idea to make a backup of your ACT! database. You'll find an ACT! Knowledge Center article on how to back up your database at <http://itdomino.act.com/act.nsf/docid/199833111232>.

23 *ACTDIAG Scan & Repair* — The Scan & Repair function in the handy ACTDIAG utility will scan your database, checking

for any issues related to data integrity, and it will correct or remove invalid internal database links. If an error is found, it creates an ACT!Diag record in the database that contains information about the error. An ACT! Knowledge Center article that tells you all about ACTDIAG, including how to perform a Scan & Repair, is available at <http://itdomino.act.com/act.nsf/docid/2000020710185201>.

After you run Scan & Repair, you'll need to open the ACT! database, and you'll get a scary message that says "The Index files are missing or corrupt" — you want to select **Yes** to repair. ACT! will rebuild all of the necessary index files.

24 *Move database locally to the machine where the ACT! 2005 database will reside* — If you don't perform the conversion on the machine that the database will permanently live on, you'll get this error message: "The physical filename <Database_Name>.Adf may be incorrect." Each ACT! 2005 database is connected, upon creation or conversion, to the SQL instance on that computer. Therefore, each new database that you create or convert must reside in a physical location on that same computer. You cannot use virtual or mapped drives because they're gen-

erally not local physical locations. The best way to do this is to make a backup of the database and restore it to the location of the ACT! 2005 database. An ACT! Knowledge Center article on how to back up and restore your database is available at <http://itdomino.act.com/act.nsf/docid/199833111232>. This also means that you can't easily move an ACT! 2005 database from one location to another. You'll find an ACT! Knowledge Center article that tells you how to move an ACT! 2005 database from one folder to another on the same machine at <http://itdomino.act.com/act.nsf/docid/20048197345>.

Now, we can convert! If the steps presented here seem too daunting, I highly recommend you contact an ACT! Certified Consultant — visit www.act.com/community/acc to find one in your area.

In a future article, I'll walk you through a conversion and provide all the tips and tricks necessary to successfully convert an ACT! 5.0 or 6.0 database to ACT! 2005. ♦

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