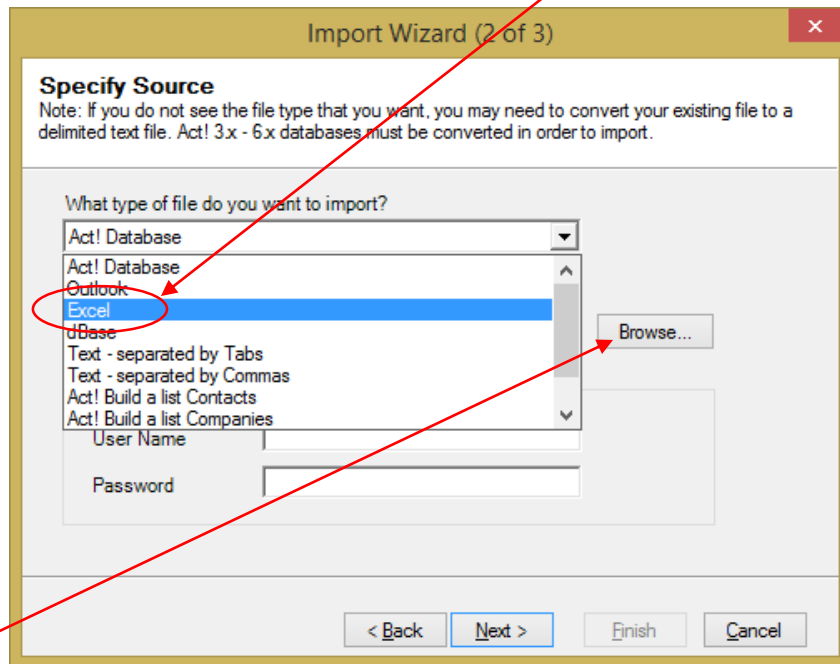


Excel to ACT! Import Cheat Sheet

- 1) Make your Excel Column Titles match the names of your ACT! Fields: For example, Column A shows "Name". Change that to "Contact" as it is in ACT! Change "Address" to "Address 1" as it is in ACT! Continue through all columns in your spreadsheet, making them match ACT! Fields.

	Contact			Address 1
	A	B	C	D
1	Name	Company	E-mail	Address
2	Chris Huffman	CH TechONE	Chris@CHTechONE.email	13 East 54th St.
3	Morgan Kennedy	Coffee Producers of Australia	MK@coffeepa.email	1330 White Cloud Rd.
4	Nick Charles	Continental Detective Agency	nick@continentaldetective.email	26 W Granite St
5	John Guild	Continental Detective Agency	john@continentaldetective.email	26 W Granite St

- 2) Add any identifying columns to your Spreadsheet to describe the Source or the record Type (or other desired info). *For example*, add a "Referred By" titled column and fill all active rows with the words "Chamber Meeting Jan 2016" to allow you to identify all the people you met at the Chamber of Commerce Meeting in Jan 2016. Add an ID/Status titled column and paste Active Lead in each row to identify them all as Active Leads.
- 3) Save and close your Excel spreadsheet.
- 4) Open ACT! (if not already).
- 5) Choose "Import" from the File menu
- 6) An Import Wizard will open: Select "Next"
- 7) From the drop-down menu, select the type of file you wish to Import (Excel)



- 8) Browse to the Excel file you wish to Import and select it.
- 9) In the Specify Record Type step, Contact Records is selected by Default. Leave it as is, and select "Next".
- 10) In the next step, "Typical Import" is selected by Default. Leave it as is, and select next. ** IF you did not make your Excel Columns match the ACT! Fields, you can do a Custom Import and "map" fields manually.*
- 11) The next step confirms that Fields are compatible, and you can proceed with the Import. Select Import.
- 12) That's all it takes!