

From the project manager to a team of administrative, programming, and technical specialists, ATS believes in a team approach that brings together all of the necessary elements pre-conference and onsite to make your show a success. We are on your team!

For your convenience, we have made instructions available to assist you with importing your data. Please select the link below that corresponds to the program you wish to import your data. If you need any further assistance, feel free to contact our office at 985-809-0600. We would be happy to assist you.

Contents

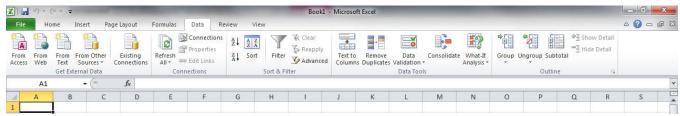
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OPENING A LEADS.TXT FILE IN EXCEL 2010

- 1. Open EXCEL.
- 2. Insert the USB FLASH MEMORY DRIVE in an available USB port on your computer.

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3. Click on the **Data** tab and click on the option **From Text**



- 4. Then select the drive labeled **REMOVABLE DISK**. The **REMOVABLE DRIVE** letter will depend on how many devices are already attached to your machine.
- 5. Select the leads text file.

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Organize 🔻 New	folder				
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F	ile <u>n</u> ame:		-	Text Files	•

- 6. The text import wizard window will now pop up.
- 7. In the Original data type section at the top: Choose the DELIMITED button. (See Figure 1)

The Text Wizard has	determined that you	r data is Fixed Width			
(f this is correct, cho	ose Next, or choose	the data type that be	est describes you	ur data.	
Original data type					
100 The State of Stat	e that best describes	your data:			
Opelimited	- Characters such a	as commas or tabs se	eparate each fiel	d.	
Fixed width	- Fields are aligned	in columns with space	es between ead	h field.	
Start import at row:	1 🖨 Fi	e origin: 437 :	OEM United Stat	es	
atar t import at row:	1 7 10	c origin.			
start import at <u>r</u> ow;					E
Preview of file F: Ve 1 "04/15/10", 2 "04/28/10", 3 "04/28/10", 4 "04/28/10",		ST","13502","11 ST","000367","(ST","36801","34 ST","22866","22	000367", 5801", 2866",		ast Name"
Preview of file F: Ve 1 "04/15/10", 2 "04/28/10", 3 "04/28/10", 4 "04/28/10",	ads.txt. "04:21:15 PM C: "12:16:11 PM C: "12:48:15 PM C: "12:54:55 PM C:	ST","13502","11 ST","000367","(ST","36801","34 ST","22866","22	000367", 5801", 2866",		ast Name" ^ ,"", ,"", ,"", ,"", ,
Preview of file F: Ve 1 "04/15/10", 2 "04/28/10", 3 "04/28/10", 4 "04/28/10",	ads.btt. "12:16:11 PM C: "12:46:15 PM C: "12:48:15 PM C: "12:56:41 PM C: "12:56:41 PM C:	ST","13502","11 ST","000367","(ST","36801","34 ST","22866","22	000367", 5801", 2866",		ast Name" ^ ,"", ,"", ,"", ,", +
Preview of file F: Ve 1 "04/15/10", 2 "04/28/10", 3 "04/28/10", 4 "04/28/10",	ads.btt. "12:16:11 PM C: "12:46:15 PM C: "12:48:15 PM C: "12:56:41 PM C: "12:56:41 PM C:	ST","13502","11 ST","000367","(ST","36801","34 ST","22866","22	000367", 5801", 2866",		ast Name" • ,"", ,"", ,"", ,", +

- 8. In the same window: **START IMPORT AT ROW**: [1] and **FILE ORIGIN**: should be [437 : OEM United States] (See Figure 1)
- 9. Click the **NEXT>** button (See Figure 1)
- 10. Delimiters should be set to **COMMA** (See Figure 2)

ext Import Wiz	ard - Step	2 of 3					8	X
his screen lets y lelow. Delimiters Tab Semicolon Semicolon Space Other: Data greview			secutive o	a contains. Jelimiters a	You can see how y s one	our text is affecte	d in the pre	view
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•	m			Cance	el 🦳 < <u>B</u> ack	<u>N</u> ext >	E	nish

Figure 2

- 11. TREAT CONSECUTIVE DELIMITERS AS ONE show be unchecked (See Figure 2)
- 12. TEXT QUALIFIER is ["](See Figure 2)
- 13. Click the **NEXT>** button (See Figure 2)
- 14. Using the horizontal scroll bar, scroll to the right until you see the Zip Code field in the white data area window. (See Figure 3)

This screen lets you select each o	olumn and set the Data Format.	
Column data format General Text	'General' converts numeric values to numbers, date values to dates, and remaining values to text.	d all
© Date: MDY ▼	Advanced	
O Do not import column (skip)		
Data preview General General Genera	1 GenerText GenerGeneral Gener	a
	il GenerText GenerGeneral Gener LA Zip/Postal USA Phone	a _
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		a ▲ ↓ ↓

Figure 3

- 15. Click on the **GENERAL** header of the Zip Code field, this will select the entire Zip Code column. Choose: **TEXT** using the buttons at the top right of the window (Column Data Format) (See Figure 3)
- 16. Click the **FINISH** button. (See Figure 3)
- 17. The Text Wizard window will close and Excel will ask where you would like to put the data. Press OK.

Where do you want to Existing works	100	ita?
=\$A\$1	neeu	I
O New workshee	et	
Properties	ОК	Cancel

- 18. Select all of the data by clicking on the gray box above the [1] column and next to row [A]. This will select all of the data on the spreadsheet.
- 19. Go to the top menu, Choose: **FORMAT, COLUMN, AUTOFIT SELECTION**. You are now ready to view and use the lead data.

OPENING A LEADS.TXT FILE IN EXCEL 2007

1. Open EXCEL.

2. Insert the USB FLASH MEMORY DRIVE in an available USB port on your computer.

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TE	min
1	- 22
Fr	om

3. Click on the **Data** tab and click on the option **From Text** Text

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- 4. Then select the drive labeled **REMOVABLE DISK**. The **REMOVABLE DRIVE** letter will depend on how many devices are already attached to your machine.
- 5. Select the leads text file.

	 Removable Disk (E:) 	• + j	Search Removable Dis	:k (E:) 🔎
Organize 🔻 New folde				
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My Web Sites on			Text Files (*.prn;*.txt;*.c	sv) 🔻

- 6. The text import wizard window will now pop up.
- 7. In the Original data type section at the top: Choose the **DELIMITED** button. (See Figure 1)

ext Import Wizard	Step 1 of 3
The Text Wizard has	determined that your data is Fixed Width.
If this is correct, choo	se Next, or choose the data type that best describes your data.
Original data type	
Choose the file type	that best describes your data:
Opelimited	- Characters such as commas or tabs separate each field.
🔘 Fixed <u>w</u> idth	- Fields are aligned in columns with spaces between each field.
Start import at <u>r</u> ow:	1 🗘 File origin: 437 : OEM United States
Start import at <u>r</u> ow: Preview of file F: \e	
Preview of file F:\le	ads.txt. "04:21:15 PM CST","13502","1234","First Name"," ","Last Name","
Preview of file F:\le	ads.txt. "04:21:15 PM CST","13502","1234","First Name"," ","Last Name" ^ "12:16:11 PM CST","000367", "000367", "", "", "",
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Preview of file F:\/e 1 "04/15/10", 2 "04/28/10", 3 "04/28/10", 4 "04/28/10",	ads.bxt. "04:21:15 PM CST", "13502", "1234", "First Name", ", "Last Name", " '12:16:11 PM CST", "000367", "000367", ", ", ", ", ", ", ", ", '', '', '', '
Preview of file F:\/e 1 "04/15/10", 2 "04/28/10", 3 "04/28/10", 4 "04/28/10",	ads.bxt. "04:21:15 PM CST", "13502", "1234", "First Name", ", "Last Name", " '12:16:11 PM CST", "000367", "000367", ", ", ", ", ", ", ", ", ", ", ", ", "

Figure 1

- 8. In the same window: **START IMPORT AT ROW**: [1] and **FILE ORIGIN**: should be [437 : OEM United States] (See Figure 1)
- 9. Click the **NEXT>** button (See Figure 1)
- 10. Delimiters should be set to **COMMA** (See Figure 2)

his screen let elow.	s you set the	delimiters	your data	contains.	You can see how y	our text is affecte	d in the preview
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04/15/10	04:21:15		14 000307-0005	1234	First Name	Last Name	Title Comp ^
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04/15/10 04/28/10 04/28/10	04:21:15 12:16:11 12:48:15	PM CST PM CST	000367 36801	0003 <mark>67</mark> 36801	First Name	Last Name	Title Com
04/15/10 04/28/10 04/28/10 04/28/10	04:21:15 12:16:11 12:48:15 12:54:55	PM CST PM CST PM CST	000367 36801 22866	000367 36801 22866	First Name	Last Name	Title Comp
04/15/10 04/28/10 04/28/10 04/28/10	04:21:15 12:16:11 12:48:15 12:54:55 12:56:41	PM CST PM CST PM CST PM CST	000367 36801 22866	0003 <mark>67</mark> 36801	First Name	Last Name	Title Com +
04/15/10 04/28/10 04/28/10 04/28/10	04:21:15 12:16:11 12:48:15 12:54:55	PM CST PM CST PM CST PM CST	000367 36801 22866	000367 36801 22866	First Name	Last Name	Title Com +
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Figure 2

- 11. TREAT CONSECUTIVE DELIMITERS AS ONE show be unchecked (See Figure 2)
- 12. TEXT QUALIFIER is ["](See Figure 2)
- 13. Click the **NEXT>** button (See Figure 2)
- 14. Using the horizontal scroll bar, scroll to the right until you see the Zip Code field in the white data area window. (See Figure 3)

This screen lets you select each co Column data format	olumn and set the Data Format.		
© General © Text	'General' converts numeric value remaining values to text.	s to numbers, date values to o	dates, and all
Date: MDY Do not import column (skip)	[<u>A</u> dvanced	
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GeneraGeneral Genera			Cenera

Figure 3

- 15. Click on the **GENERAL** header of the Zip Code field, this will select the entire Zip Code column. Choose: **TEXT** using the buttons at the top right of the window (Column Data Format) (See Figure 3)
- 16. Click the **FINISH** button. (See Figure 3)
- 17. The Text Wizard window will close and Excel will ask where you would like to put the data. Press OK.

Where do you want to pu	
=\$A\$1	
New worksheet	

- 18. Select all of the data by clicking on the gray box above the [1] column and next to row [A]. This will select all of the data on the spreadsheet.
- 19. Go to the top menu, Choose: **FORMAT, COLUMN, AUTOFIT SELECTION**. You are now ready to view and use the lead data.

OPENING A LEADS.TXT FILE IN EXCEL 2003

- 1. Open EXCEL.
- 2. Insert the USB FLASH MEMORY DRIVE in an available USB port on your computer.
- 3. At the top of the window, Choose Data > Import External Data > Import Data ...

Data	a			
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	Text to Columns			
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	Group and Outline			
1	PivotTable and PivotChart Report			
	Import External <u>D</u> ata	•	ě	Import Data
	List	+	勸	New Web Query
	XML	•	1	New Database Query
2	Refresh Data	- 1	影	Edit Query
		ľ	ET.	Data Range Properties
			-2[2]	Parameters

- 4. Then select the drive labeled **REMOVABLE DISK**. The **REMOVABLE DRIVE** letter will depend on how many devices are already attached to your machine.
- 5. Select the leads text file.

Select Data So	urce	? 🗙
Look in:	🖙 Removable Disk (E:) 💽 🎯 🗸 🖄 🔯 🐺 🛪 Tools 🗸	
My Recent Documents Desktop My Documents My Computer	Eeads.txt	
My Network Places		Open

- 6. The text import wizard window will now pop up.
- 7. In the Original data type section at the top: Choose the **DELIMITED** button. (See Figure 1)

ext Import Wizard	Step 1 of 3
The Text Wizard has	determined that your data is Fixed Width.
If this is correct, choo	se Next, or choose the data type that best describes your data.
Original data type	
Choose the file type	that best describes your data:
Opelimited	- Characters such as commas or tabs separate each field.
🔘 Fixed <u>w</u> idth	- Fields are aligned in columns with spaces between each field.
Start import at <u>r</u> ow:	1 🗘 File origin: 437 : OEM United States
Start import at <u>r</u> ow: Preview of file F: \e	
Preview of file F:\le	ads.txt. "04:21:15 PM CST","13502","1234","First Name"," ","Last Name","
Preview of file F:\le	ads.txt. "04:21:15 PM CST","13502","1234","First Name"," ","Last Name" ^ "12:16:11 PM CST","000367", "000367", "", "", "",
1 "04/15/10", 2 "04/28/10", 3 "04/28/10", 4 "04/28/10",	ads.txt. "04:21:15 PM CST","13502","1234","First Name"," ","Last Name","
Preview of file F:\/e 1 "04/15/10", 2 "04/28/10", 3 "04/28/10", 4 "04/28/10",	ads.bxt. "04:21:15 PM CST", "13502", "1234", "First Name", ", "Last Name", " '12:16:11 PM CST", "000367", "000367", ", ", ", ", ", ", ", ", '', '', '', '
Preview of file F:\/e 1 "04/15/10", 2 "04/28/10", 3 "04/28/10", 4 "04/28/10",	ads.bxt. "04:21:15 PM CST", "13502", "1234", "First Name", ", "Last Name", " '12:16:11 PM CST", "000367", "000367", ", ", ", ", ", ", ", ", ", ", ", ", "

Figure 1

- 8. In the same window: **START IMPORT AT ROW**: [1] and **FILE ORIGIN**: should be [437 : OEM United States] (See Figure 1)
- 9. Click the **NEXT>** button (See Figure 1)
- 10. Delimiters should be set to COMMA (See Figure 2)

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- 11. TREAT CONSECUTIVE DELIMITERS AS ONE show be unchecked (See Figure 2)
- 12. TEXT QUALIFIER is ["](See Figure 2)
- 13. Click the **NEXT>** button (See Figure 2)
- 14. Using the horizontal scroll bar, scroll to the right until you see the Zip Code field in the white data area window. (See Figure 3)

Fext Import Wizard - Step 3 of 3			?
This screen lets you select each column and set the Data Format. 'General' converts numeric values to numbers, date values to dates, and all remaining values to text.	Column data O <u>G</u> eneral O <u>Text</u> O <u>D</u> ate:	MDY 💌	
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		104 - 11- 14 17- 474 - 27	>
Cancel	< Back	Next >	Einish

Figure 3

- 15. Click on the **GENERAL** header of the Zip Code field, this will select the entire Zip Code column. Choose: **TEXT** using the buttons at the top right of the window (Column Data Format) (See Figure 3)
- 16. Click the **FINISH** button. (See Figure 3)
- 17. The Text Wizard window will close and Excel will ask where you would like to put the data. Press OK.

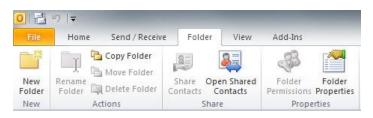
Import Data	
Where do you want to put the data?	OK Cancel
Create a PivotTable report	
Properties Parameters	Edit Query

- 18. Select all of the data by clicking on the gray box above the [1] column and next to row [A]. This will select all of the data on the spreadsheet.
- 19. Go to the top menu, Choose: **FORMAT, COLUMN, AUTOFIT SELECTION**. You are now ready to view and use the lead data.

OPENING A LEADS.TXT FILE IN OUTLOOK 2010

First, open the file in EXCEL in order to organize the headers and contact data. Refer to EXCEL instruction page. Save file from EXCEL as a **Tab Delimited** text file.

- 1. Open OUTLOOK
- 2. Click on the **CONTACT** icon Solution Contacts on the left side of the window.
- 3. Click on the Folder tab and click on the option New Folder Folder



- 4. Create New Folder window pops up. Name the folder (example: Use the name of the show). Click **OK**.
- Now choose in the menu at the top FILE > OPEN>IMPORT. The Import and Export Wizard windows will open.

File	Home	Send / Receive	Folder	View	Add-Ins
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6. Choose **IMPORT FROM ANOTHER PROGRAM OR FILE** from the selections. Click the **NEXT>** button.

Import and Export Wizard	an and state and	
	Choose an action to perform:	
	Export RSS Feeds to an OPML file Export to a file	
	Import a VCARD file (.vcf) Import an iCalendar (.ics) or vCalendar file (.vcs)	
	Import from another program or file Import Internet Mail Account Settings Import Internet Mail and Addresses Import RSS Feeds from an OPML file	
	Import RSS Feeds from the Common Feed List Description	
	Import data from other programs or files, including ACT!, Lotus Organizer, Personal Folders (.PST), database files, text files, and others.	
	< <u>B</u> ack Next > Cancel	

7. In SELECT FILE TYPE TO IMPORT FROM: Choose Tab separated values (Windows), Click NEXT>

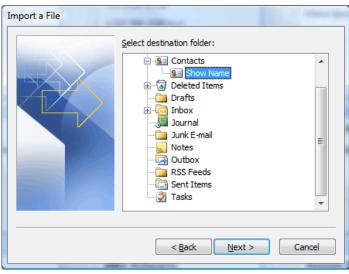
Import a File	all the still was	Status (
	Select file type to import from:	
	Lotus Organizer 5.x Microsoft Access 97-2003 Microsoft Excel 97-2003	^
	Outlook Express 4.x, 5.x, 6.x or Windows Mail Personal Address Book	=
	Personal Folder File (.pst) Tab Separated Values (DOS) Tab Separated Values (Windows)	-
	< <u>B</u> ack <u>N</u> ext > C	ancel
	And the residences of the	The Local Division in which the

8. To select **FILE TO IMPORT**: Click the Browse Button and choose **"Removable Drive"** and select the **LEADS.TXT** file. Go to the very bottom and choose **TAB SEPERATED VALUES (WINDOWS)**. Click the **OK>** button.

Import a File	17 MA - 200 march	allen ar sine
	Elle to import: E:\Leads.txt Options Replace duplicates with items impo Allow duplicates to be created Do not import duplicate items	Browse
	< Back Next >	Cancel

9. Click DO NOT IMPORT DUPLICATE ITEMS radio button. Click the NEXT> button.

10. Double click on the folder that you created in Step 4 found under the Contacts list. If the folder is not displayed, click on the plus (+) sign next to Contacts and the expanded tree displays all of the sub folders under Contacts.



 A window displays the name of the file you are importing and the destination folder with a box next to it. If the box is not checked, then click on the box to add a check. Click on the Right Button MAP CUSTOM FIELDS.

Import a File	Altere for
The following actions will be performed:	
Import "Leads.txt" into folder: Show Name	Map Custom Fields
	Change Destination
This may take a few minutes and cannot be canceled.	
< Back	Finish Cancel

- 12. Click the **NEXT>** button in the From or Value side of the window. This displays the date (leads) from your USB flash drive.
- On the right side of the TO: COLUMN or FIELD side. Click on the plus sign (+) next to the Field description to expand the tree. For example by expanding (+) NAME you get (Title, First Name, Middle Name, Last Name, and Suffix).

Map Custom Fields	X			
Drag the values from the source file on the left, and drop them on the appropriate destination field on the right. Drag the item from the right to the left to remove it from the field mapping.				
From: Tab Separated Values (Windows) Leads.txt	To: Microsoft Office Outlook Show Name			
Value	Field Mapped from			
1 1234 7/7/2009 2:55:18 PM 1 Firstname	Name Title Title First Name First Name Middle Name Last Name Last Name Company Company Company First			
< Previous Next >	Qlear Map Default Map OK Cancel			

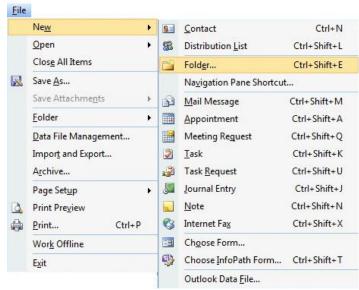
If the contact's information does not appear in the window to the right, click on it in the value column and drag it over to the corresponding word on the right side to add the leads information. Complete all information including Company, Address through Email if included. NOTE: We found that it is necessary to move the **"Title"** value to the **"Job" title"** field columns as opposed to the Title in the expanded Name field. Click **OK** when done.

- 14. In the next menu box that pops up, ensure that the box is checked next to **IMPORT "LEADS.TXT"** that click **FINISH**.
- 15. The window displays Contact. To view the contact that you just created, look above the displays contacts and click on the word **CONTACTS** in the gray bar (horizontal bar—not icon.) A menu tree appears. Look for the sub folders under Contacts in the menu tree and double click the folder name you created in Step 4. You are now ready to use the Outlook database containing your leads.

OPENING A LEADS.TXT FILE IN OUTLOOK 2007

First, open the file in EXCEL in order to organize the headers and contact data. Refer to EXCEL instruction page. Save file from EXCEL as a **Tab Delimited** text file.

- 1. Open OUTLOOK
- See Contacts
- 2. Click on the **CONTACT** icon **Contact** on the left side of the window.
- 3. At the top of the window, Choose FILE > NEW > FOLDER



- 4. Create New Folder window pops up. Name the folder (example: Use the name of the show). Click OK.
- Now choose in the menu at the top FILE > IMPORT AND EXPORT. The Import and Export Wizard windows will open.
- 6. Choose IMPORT FROM ANOTHER PROGRAM OR FILE from the selections. Click the NEXT> button.

7. In SELECT FILE TYPE TO IMPORT FROM: Choose Tab separated values (Windows), Click NEXT>

Import a File	CP-IND-DIRECTOR	dense fin
	Select file type to import from: Lotus Organizer 5.x Microsoft Access 97-2003 Outlook Express 4.x, 5.x, 6.x or Windows Mail Personal Address Book Personal Folder File (.pst) Tab Separated Values (DOS) Tab Separated Values (Windows)	• III •
	< Back Next > Ca	ancel

- To select FILE TO IMPORT: Click the Browse Button and choose "Removable Drive" and select the LEADS.TXT file. Go to the very bottom and choose TAB SEPERATED VALUES (WINDOWS). Click the OK> button.
- 9. Click **DO NOT IMPORT DUPLICATE ITEMS** radio button. Click the **NEXT>** button.

Import a File	All the state over
	Elle to import: E:\Leads.txt Browse Options Replace duplicates with items imported Allow duplicates to be created On ont import duplicate items
	< <u>B</u> ack Next > Cancel

10. Double click on the folder that you created in Step 4 found under the Contacts list. If the folder is not displayed, click on the plus (+) sign next to Contacts and the expanded tree displays all of the sub folders under Contacts.

Import a File	of the state of	and the second
	Select destination folder:	The second secon
	< <u>B</u> ack Next >	Cancel

A window displays the name of the file you are importing and the destination folder with a box next to it.
 If the box is not checked, then click on the box to add a check. Click on the Right Button MAP CUSTOM FIELDS.

nport a File	etanor (pe
The following actions will be performed:	
Import "Leads.txt" into folder: Show Name	Map Custom Fields
	Change Destination
This may take a few minutes and cannot be canceled.	
< <u>B</u> ack	Finish Cancel
	The following actions will be performed:

- 12. Click the **NEXT>** button in the From or Value side of the window. This displays the date (leads) from your USB flash drive.
- 13. On the right side of the **TO: COLUMN or FIELD** side. Click on the plus sign (+) next to the Field description to expand the tree. For example by expanding (+) **NAME** you get (Title, First Name, Middle Name, Last Name, and Suffix).

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n the right. Drag the item from the right t	to the lef	ft to remove it from the	e field mapping.	
From:		To:		
Tab Separated Values (Windows)		Microsoft Office Outle	ook	
Leads.txt		Show Name		
Value	•	Field	Mapped from	-
1		📮 Name		
1234		···· Title	Title	
7/7/2009		····First Name	First Name	
2:55:18 PM		····Middle Name		
1		Last Name	Last Name	
Firstname		ⁱ Suffix		
	-	Company	Company	-
< III >	*	<		
< Previous Next >		Clear Map	Default Ma	ap

If the contact's information does not appear in the window to the right, click on it in the value column and drag it over to the corresponding word on the right side to add the leads information. Complete all information including Company, Address through Email if included. NOTE: We found that it is necessary to move the **"Title"** value to the **"Job" title"** field columns as opposed to the Title in the expanded Name field. Click **OK** when done.

- 14. In the next menu box that pops up, ensure that the box is checked next to **IMPORT "LEADS.TXT"** that click **FINISH**.
- 15. The window displays Contact. To view the contact that you just created, look above the displays contacts and click on the word **CONTACTS** in the gray bar (horizontal bar—not icon.) A menu tree appears. Look for the sub folders under Contacts in the menu tree and double click the folder name you created in Step 4. You are now ready to use the Outlook database containing your leads.

OPENING A LEADS.TXT FILE IN OUTLOOK 2003

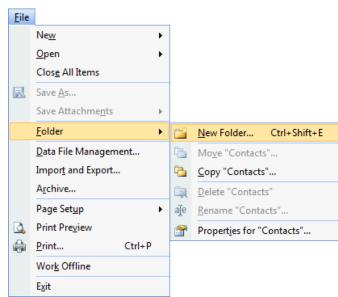
First, open the file in EXCEL in order to organize the headers and contact data. Refer to EXCEL instruction page. Save file from EXCEL as a **Tab Delimited** text file.

- 1. Open OUTLOOK
- 2. Click on the **CONTACT** icon

Secontacts

on the left side of the window.

3. At the top of the window, Choose FILE > FOLDER > NEW FOLDER



- 4. Create New Folder window pops up. Name the folder (example: Use the name of the show). Click **OK**.
- 5. Now choose in the menu at the top **FILE > IMPORT AND EXPORT**. The Import and Export Wizard windows will open.
- 6. Choose **IMPORT FROM ANOTHER PROGRAM OR FILE** from the selections. Click the **NEXT>** button.

Import and Export Wizard				
Choose an action to perform: Export RSS Feeds to an OPML file Export to a file Import a VCARD file (.vcf) Import find another program or file Import Internet Mail Account Settings Import Internet Mail and Addresses Import RSS Feeds from an OPML file Import RSS Feeds from the Common Feed List Description Import data from other programs or files, induding ACT!, Lotus Organizer, Personal Folders (.PST),				
database files, text files, and others.				
< <u>B</u> ack Next > Cancel				

7. In SELECT FILE TYPE TO IMPORT FROM: Choose Tab separated values (Windows), Click NEXT>

Import a File	17-188-1818-1-1-1	Alterna Spec
	Select file type to import from: Lotus Organizer 5.x Microsoft Access 97-2003 Microsoft Excel 97-2003 Outlook Express 4.x, 5.x, 6.x or Windows Mail Personal Folder File (.pst) Tab Separated Values (DOS) Tab Separated Values (Windows)	▲ E
	< Back Next > Ca	incel

- To select FILE TO IMPORT: Click the Browse Button and choose "Removable Drive" and select the LEADS.TXT file. Go to the very bottom and choose TAB SEPERATED VALUES (WINDOWS). Click the OK> button.
- 9. Click **DO NOT IMPORT DUPLICATE ITEMS** radio button. Click the **NEXT>** button.

Import a File	all the state over
	Elle to import: E:\Leads.txt Browse Options Replace duplicates with items imported Allow duplicates to be created Options Logo not import duplicate items
	< Back Next > Cancel

10. Double click on the folder that you created in Step 4 found under the Contacts list. If the folder is not displayed, click on the plus (+) sign next to Contacts and the expanded tree displays all of the sub folders under Contacts.

Import a File	17 Mg. 200	alenar ige
	Select destination folder:	E
	< <u>B</u> ack Next >	Cancel

A window displays the name of the file you are importing and the destination folder with a box next to it.
 If the box is not checked, then click on the box to add a check. Click on the Right Button MAP CUSTOM FIELDS.

Import a File	Allow Bar
The following actions will be performed:	
Import "Leads.txt" into folder: Show Name	Map Custom Fields
	Change Destination
This may take a few minutes and cannot be cance	ed.
< <u>B</u> ack	Finish Cancel

- 12. Click the **NEXT>** button in the From or Value side of the window. This displays the date (leads) from your USB flash drive.
- 13. On the right side of the **TO: COLUMN or FIELD** side. Click on the plus sign (+) next to the Field description to expand the tree. For example by expanding (+) **NAME** you get (Title, First Name, Middle Name, Last Name, and Suffix).

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From: Tab Separated Values (Windows)		To: Microsoft Office Outl	pok	
Leads.txt		Show Name		
Value		Field	Mapped from	-
1		📮 Name		-
1234		Title	Title	
7/7/2009		····First Name	First Name	
2:55:18 PM		····Middle Name		
1		Last Name	Last Name	
Firstname		ⁱ Suffix		
	Ψ.	Company	Company	Ŧ
•	•		•	

If the contact's information does not appear in the window to the right, click on it in the value column and drag it over to the corresponding word on the right side to add the leads information. Complete all information including Company, Address through Email if included. NOTE: We found that it is necessary to move the **"Title"** value to the **"Job" title"** field columns as opposed to the Title in the expanded Name field. Click **OK** when done.

- 14. In the next menu box that pops up, ensure that the box is checked next to **IMPORT "LEADS.TXT"** that click **FINISH**.
- 15. The window displays Contact. To view the contact that you just created, look above the displays contacts and click on the word **CONTACTS** in the gray bar (horizontal bar—not icon.) A menu tree appears. Look for the sub folders under Contacts in the menu tree and double click the folder name you created in Step 4. You are now ready to use the Outlook database containing your leads.

OPENING A LEADS.TXT FILE IN ACT

These instructions are for a text file. If you are opening from the leads file that you already imported into EXCEL, you must save the file as **"Text (Tab Delimited) *.txt"** file before you import into ACT.

- 1. Insert the **USB FLASH MEMORY DRIVE** in an available USB port on your computer.
- 2. Open ACT
- 3. Close any database that opens.
- 4. Go to FILE, OPEN
- 5. In the open dialog box select the drive labeled **"REMOVABLE DISK"**. At the bottom next to the **FILES OF TYPE** choose **TEXT-DELIMITED** (*.TXT) in the pull down menu.
- 6. Click on the **LEADS.TXT** file and click the **OPEN** button.
- 7. A dialog box appears to tell you the file is not an ACT database and you will have to follow the Import Wizards instructions. Click **YES**.
- 8. The **SAVE AS** window opens. Name the file as you wish. The name of the show that you attended is a good choice. Act is saving the file as an ACT database file. Click **SAVE** when you have named the file.
- 9. The **"MY RECORD"** information box will appear. Fill out your name and company if you have not already done so. Click **OK**.
- 10. Click **YES** to say the information is correct when the dialog box appears.
- 11. The **IMPORT WIZARD** will now pop up. Click **NEXT** on the first dialog.
- 12. Choose **CONTACT RECORDS ONLY** radio button. Click **OPTIONS**. Make sure that the **COMMA** radio button is checked and **WINDOWS (ANSI)** is selected for character set. Also check the **YES, IMPORT THE FIRST RECORD**. Click **NEXT**.
- 13. In the next dialog box for predefined map files, a choice has to be made on what your final use for the data is going to be. For a default ACT database, select **DON'T USE PREDEFINED MAP** radio button and click **NEXT**.
- 14. An import wizard **"CONTACT MAP"** dialog box appears. The headers of the file from the USB drive are to the left. Next to the field on the left, click the corresponding field in ACT from the pull down menu, this is located to the right. Go through each field that you would like to map. If **DEMOGRAPHICS** are included, choose **NOTE**. Click **FINISH**.
- 15. The merging begins. Once finished you are now ready to use ACT.