

## Importing Contacts into the ACT! Contact Manager

You can import data provided on *Casino City's Gaming Business Directory CD* and data downloaded from the [GamingDirectory.com](http://GamingDirectory.com) website into the ACT! contact management system. This section outlines the data import process for the ACT!2000 version of this software.

First you should select the data you wish to import into ACT!. If you only wish to import a portion of the contacts contained in one of the *Gaming Business Directory* files you must first use a tool other than ACT! to create a file that includes just the contacts you want to import. If you want to import a portion of the `GamingProperty`, `GamingPropertyContacts`, `PropertyOwners` or `PropertyOwnerContacts` tables, then we recommend using the [GamingDirectory.com](http://GamingDirectory.com) website to select and download the appropriate information. Using [GamingDirectory.com](http://GamingDirectory.com) you can easily select contacts based on a variety of criteria including geographic location, department, and type of gaming facility.

Once you have *Gaming Business Directory* data ready to import you should open the ACT! database into which the contacts are to be imported. If you want to create a new database for the contacts, use the ACT! menu system to select `File > New > ACT Database` and provide a name for the new database. If you want to import contacts into an existing database, we recommend you create a backup copy of the database before proceeding so you can restore the original database if necessary. Open the ACT! database, select `File > Backup`, provide the name of the location where the backup .zip file should be saved, make sure all of the Options tab items are checked and click `Start`. You can restore the ACT! database to the backup version by selecting `File > Restore`, providing the location and name of the backup .zip file, and clicking `Start`.

When ACT! is importing contact records into a new empty database and it encounters a match with the first and last name of a previously imported contact, it normally prompts you to determine if the new contact should be merged with the existing contact record, added as a separate contact record, or skipped and not added. When importing *Gaming Business Directory* contacts into a new database we recommend that you disable these duplicate checking prompts so that all contacts are added automatically without any intervention. Use the ACT! menu system to select `Edit > Define Fields > Advanced Tab` and uncheck the "Enable duplicate checking" option for a newly created database.

If you have previously imported contacts from the `GamingProperties`, `GamingPropertyContacts`, `PropertyOwners`, or `PropertyOwnerContacts` tables into ACT! we recommend using the `PropertyId`, `OrganizationId` and `ContactId` values for duplicate checking when importing subsequent updates downloaded from [GamingDirectory.com](http://GamingDirectory.com). Use the ACT! menu system to select `Edit > Define Fields > Advanced Tab`. In the dropdown lists under the heading "Match duplicates using," select the ACT! field used to hold `PropertyId` or `OrganizationId` in the "Match on" dropdown list. Next select the ACT! field used to hold `ContactId` in the first "Then on" dropdown list and select `<None>` in the second "Then on" dropdown list.

You use the ACT! import wizard to add *Gaming Business Directory* contacts to an ACT! database. Use the ACT! menu system to select `File > Data Exchange > Import`. You will then be prompted for the type and name of the file to be imported. If you are importing contact data downloaded from the [GamingDirectory.com](http://GamingDirectory.com) website, you should select a file type of "Text - delimited" since the file being imported is in comma-separated values format. If you are importing contacts from the CD, you should either select a file type of "dBase III-V" and use the

dBase III format files provided in the dBase folder on the CD or select a file type of “ACT! 3.x, 4.x, or 2000” and use the ACT!2000 files provided in the ACT folder on the CD.

There are a variety of factors that will dictate whether it is better to use the dBase III or ACT!2000 version of the data when importing data from the CD. You can only use the ACT!2000 version of the data if it contains all of the information you wish to import. ACT! has limitations on the number of fields so the ACT! version of the data does not contain as much information as the dBase III version of the data. Appendix D documents the limitations on information available in the ACT!2000 version of the data. Additionally, you cannot import data from an ACT! database when it is only available read-only as is the case for files on the CD. This means you must first copy ACT! files from the CD to your computer’s hard drive and change their file attributes so they are no longer read-only before you can import data from them. There are two advantages to importing data from an ACT! database. First, the mapping of fields is simpler. Second, the issues that can arise when importing phone numbers with country codes into ACT! described later in this section are avoided.

Once you have specified the file type and file name to import click Next. You should be careful not to click Finish at this point. On the next Import Wizard screen, check Contact Records. If you have selected a file type of “Text - delimited” you should also click Options and uncheck the “Yes, import the first record” option. This prevents the comma-separated values header record from being imported as a contact record. Clicking Next takes you to the subsequent Import Wizard screen. Check the “Don’t use predefined map” option on this screen and click Next.

You should now be presented with the Import Wizard Contact Map screen, which you must use to specify how to map *Gaming Business Directory* column names (shown in the left column) to ACT! fields (shown in the right column). Table 3 shows the names of the *Gaming Business Directory* columns used in Text-delimited and dBase input formats and the corresponding ACT! field names. When the names do not match exactly, you must explicitly define the mapping. For example, you should locate PostalCode in the first column, click the right column for that row, and select Zip from the dropdown list showing all ACT! fields. This will map the PostalCode input column or field to the Zip ACT! field. When importing from an ACT! database the fields shown in Table 1 will already match directly to the ACT! field names.

The mappings shown in Table 3 are suggested mappings. In some cases you may want to alter the mappings if the suggested use does not match your normal use of the fields. For example, the Phone and Email provided for *Gaming Business Directory* contacts are for the company, and not for the individual contact. If you normally keep personal phone or e-mail addresses in the ACT! Phone and E-mail Address fields then saving company information in these fields may be inappropriate. Doing so would make it hard to merge new *Gaming Business Directory* contact data into existing contact records since the normal merge process would then replace older personalized data with newer company data for an individual contact.

You must decide if you would rather import the TitleLong column or the more compact Title column into ACT! as the Title field. We generally recommend using the shorter Title column. Please note that the columns shown in the table are not present in all *Gaming Business Directory* files. For example, the PhoneExtension column is only present in the Suppliers and SupplierContacts tables.

You can also import additional columns listed in Appendix A or C that are not shown in Table 3, into ACT! Generally, additional columns should be mapped to ACT!’s user defined fields. You

should import any columns that will be useful to you in your interaction with the contacts you are importing.

We recommend that you import the PropertyId or OrganizationId and ContactId columns into ACT! We will change the name of a property contained in the Company field to match a newer preferred property name. Similarly, the name of an individual can change due to a change in marital status or a spelling correction. If the PropertyId or Organization Id and ContactId fields are included in your ACT! database then subsequent updates can be merged based on the more stable PropertyId or OrganizationId and ContactId values.

Please note that importing telephone numbers may work differently than you would expect. ACT! will frequently add a country code to the beginning of an imported telephone number based on the contact's country even if a country code is already present in the telephone number. When this occurs the country code will be duplicated at the beginning of the imported telephone number.

Once you have completed the field mappings, click Finish. The data will then be imported into the existing or newly initialized ACT! database. The time required to complete the import will vary based on the number of contacts being imported. Normally only a few minutes are required, but importing a large file such as GamingPropertyContacts, which contains 18,000 contacts, may take over an hour. After the import is complete be sure to restore any settings you altered for duplicate checking to the values in effect before the import was performed.

**Table 3: Mapping *Gaming Business Directory* Columns to ACT! Fields**

<b>Text – delimited Column Name</b>	<b>dBase Column Name</b>	<b>ACT! Field Name</b>
Company	Company	Company
Address1	Address1	Address 1
Address2	Address2	Address 2
Address3	Address3	Address 3
City	City	City
State	State	State
PostalCode	PostalCode	Zip
Country	Country	Country
Phone	Phone	Phone
PhoneExtension	PhoneEx	Phone Ext.
Fax	Fax	Fax
TollFree	TollFree	Alt Phone
TollFreeExtension	TollFreeEx	Alt Phone Ext.
StockSymbol	StockSyml	Ticker Symbol
WebSite	WebSite	WebSite
Email	Email	E-mail Address
Salutation	Salutation	Salutation
FirstName	FirstName	First Name
LastName	LastName	Last Name
Title	Title	Title
TitleLong	TitleLong	Title