

Skip the retyping! Use Excel to share data with non-ACT! users

 **Application:** ACT! Classic/2006, Microsoft Excel 2000/2002/2003



AT A GLANCE

Your ACT! database and all the information it holds is critical to doing business, but when you must share data with someone who doesn't have ACT!, you may think you need to do a lot of retyping or copying and pasting. Think again. You can export your ACT! data into an Excel file that you can easily email to co-workers or vendors.

To help you generate an Excel file with the information you need to share, we'll:

- Export a contact list using the new 2006 Excel link for quick conversions.
- Work around Classic's lack of a direct Excel link.
- Explore some options for customizing your final Excel file to meet your needs.

You've planned a special marketing campaign to a specific group of contacts, and you need to get a list of those contacts to your printer right away. She can't perform a lookup of contacts on your ACT! database, and since she doesn't have ACT!, you can't export a lookup for her. Or can you? With ACT! 2006, you can export a lookup directly to Excel using the new Export To Excel button. If you're an ACT! Classic user, we've devised a workaround to get that data out the door, fast.

Export to Excel with ACT! 2006

By the time they released ACT! 2006, the developers realized how important a link to Excel is for most business professionals. You'll find 2006's link to Excel one of the easiest and most streamlined features in 2006.

2006's export not only exports directly to Excel but eliminates extra work. It automatically fits the columns to the longest text string, and exports only the columns shown in the Contact List view, instead of every field in ACT!. Let's take a


look at how easily you can export a lookup of all contacts in California, as an example.

Export what you want: You can customize the Contact List view to rearrange columns, and add or remove columns. In a future article, we'll show you how.

To export a lookup to Excel:

1. Perform your desired lookup using a basic or an advanced lookup.
2. Ensure ACT! is in Contact List view.

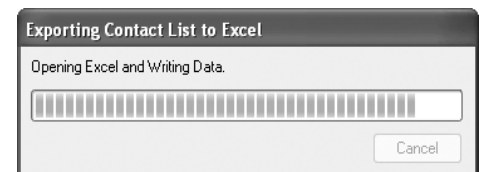
Essential step: Because you can't export to Excel from Contact Detail view, you must switch to Contact List view to export. Until you switch to Contact List view, the Export option is unavailable.

3. Select Tools | Export To Excel or click the Export To Excel button  on the toolbar. As shown in Figure 1, the Exporting Contact List To Excel dialog box appears, indicating the export's progress.

4. When complete, ACT! launches Excel and the newly created worksheet named Contact List. Select File | Save As to save the file.
5. Enter the desired name and location in the Save As dialog box and click Save. You can now email the saved file to your contact or make adjustments in Excel.

Revel in your neatly organized Excel file

ACT! created an Excel worksheet that's organized and easy to read. We show a sample sheet in Figure 2. Notice these convenient features of your new Excel file.



1: ACT! immediately starts to export your contact list to Excel and displays its progress.



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- Each column is labeled with the ACT! name for the column.
- Each column is wide enough to fit the text.
- Each column listed in the Contact List view is represented.

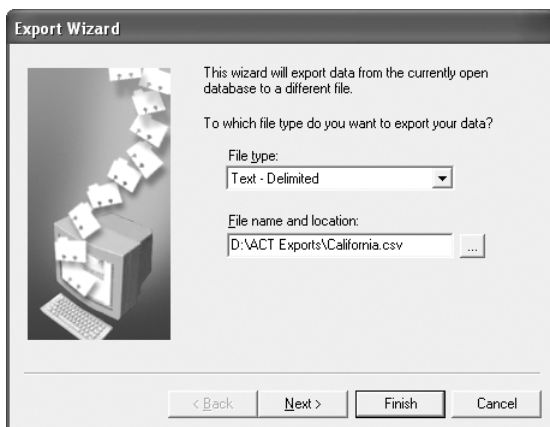
Now you can remove unnecessary columns or rearrange the columns and rows if needed. Once in Excel, your ACT! data works like any other Excel data.

Export to Excel with ACT! Classic

ACT! Classic users can't export ACT! contact data directly to Excel XLS file because the same built-in link between ACT! 2006 and Excel doesn't exist. You may already know that you can export ACT! data to a text delimited file or to a CSV. A CSV is a type of file that you can easily save as an XLS, if that's what your vendor prefers, or you can send it as-is. Let's export a lookup of all contacts in California to a CSV, and then import it into Excel.

	A	B	C	D	E	F	G	H	I	J
1	Contact Type	Private	Company	Contact	Phone	Extension	Title	Address 1	Address 2	City
2	Contact	Public	Mad House The	Greg Hart	(310) 555-2244		President	22 Acacia Ave		Manhattan Beach
3	Contact	Public	Nagenast Estate Winery	Scott Nagenast	(805) 555-2222		Owner	6401 Nag Estate Rd.	P.O. Box 6404	Paso Robles
4	Contact	Public	Sewing Room, The	Danielle Middlebury	(415) 555-2242		Owner	2392 Market St.		San Francisco
5	Contact	Public	Sierra's Cafe	Brandon Sloan	(662) 555-2142		Owner	1823 E. 2nd St.		Long Beach
6	Contact	Public	UZI International	Wilhelm Loke	(310) 555-2454		Film Critic	666 Elm St.	Suite 13	Movie City
7	Contact	Public	Yellow Jersey Bike Shop	Lance J. Parker	(619) 555-8893		Owner	315 Center Dr.	Suite 100	San Diego

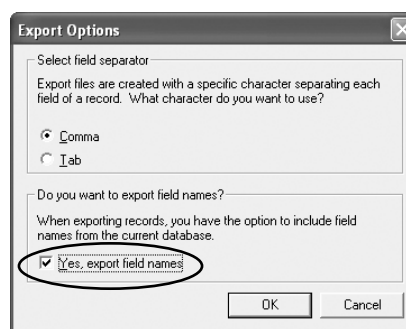
2: You can modify the Excel worksheet or simply save it.



3: You can use the Export Wizard to export ACT! data for use in another ACT! database, or as a text file.

To export a lookup to a text delimited CSV file:

1. Perform your desired lookup using a basic or an advanced lookup.
 2. Select File | Data Exchange | Export from the menu bar. The Export Wizard opens.
 3. As shown in **Figure 3**, select Text – Delimited (*.csv) from the File Type dropdown list, and then type a location, including file name, in the File Name And Location text box. Click Next.
- Tip: You can use the Browse button to select a location.**
4. Select the Contact Records Only option button to export the contact records, or select the Group Records Only option, as desired.



4: You'll save time later if you select the export field names option before you proceed.

5. Click the Options button to open the Export Options dialog box shown in **Figure 4**.
6. Select the Comma option button to designate commas as the field separator.
7. Select the Yes, Export Field Names check box, as shown in **Figure 4**, to automatically label each column in the final Excel file with the ACT! field name. Click Next.
8. Select the option button for the records you want to print (Current Record, Current Lookup, or All Records).
9. If you want to export all fields, click Finish. To organize and remove fields before exporting, click Next and then follow the instructions in the companion article, "Customize your export data in a heart beat" in this issue.

You can open the resulting CSV file in Excel to review it. The file will look similar to that in **Figure 2**, but the column headings won't be bold. Furthermore, your columns won't fit the text automatically.

Fortunately, you can bold text, delete unnecessary or unwanted columns, or change column width right in Excel. To adjust each of the column's width at once, select all the cells and then choose Format | Column | AutoFit Selection. When complete, you save the file as-is or select File | Save As to save it as an XLS file. Now, you're ready to email the file to your contact.

What an opportunity

When you export your ACT! data to provide it to others with Excel, you open up a world of sharing opportunities and save a lot of time you can use for other tasks. You can also take your use of Excel with ACT! 2006 a step further by exporting Opportunity lists to Excel and generate Excel Pivot Tables. In a future issue of ACT! Extra, we'll show you how. ♦