

OLIVIA CLARE PRESENTS

CRM Education Help Sheets

Exporting data with memo fields

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CRM Education produce help sheets, best practice documentation and bespoke courseware specifically for our clients. We try to ensure our CRM Users always enjoy a straight forward and easy CRM experience.

Data exports with notes fields

Background

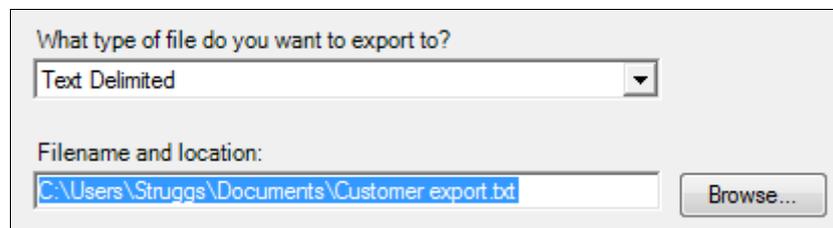
There may be occasions when you need to export data from your database, but the conventional method of simply pressing the export to excel button will not extract enough of the text. This is most commonly seen when trying to export data where one or more of the fields are formatted as memo fields within your database. The following help sheet explains how to export your data, it is a slightly longer way around the export but it will solve the problem of missing data from memo fields. This help sheet can also be used if you are on an older version of ACT! that is not compatible with later Office versions.

Create your lookup first

It is important to get the record cards that you wish to export as an active Lookup before you begin. When you begin the export routine, ACT! will ask which contacts you wish to export. For this reason make sure the Lookup is ready first.

Exporting your data

Next select **File > Export** from the main menu line (top left corner within ACT!) this will activate the export Wizard. Select **Next** on the first screen and on the second screen change the drop down option to **Text Delimited**. Below this select the location in which you wish to save the file, this can be your My Documents folder or a specific folder on the Server: Browse to the correct location and give your file a relevant name:



What type of file do you want to export to?

Text Delimited

Filename and location:

C:\Users\Struggs\Documents\Customer export.txt

Browse...

Select **Next** and if you are exporting from the Contact entity then leave the top box on **contact**, as you can see from the dialogue box below you also have the ability to export group and company records too. It is not possible however to export Opportunity data using this method.

In the lower box of this area of the wizard, ensure you choose **current lookup**, otherwise you will export either just the contact currently active on screen, or the entire database.

Specify record type(s)

What kind of records would you like to export?

Contact Records
 Group Records
 Company Records

Which records do you want to export?

Current record
 Current lookup
 All records

Select **Next** - personally I take the data out tab separated, and this documentation will assume you have followed my recommendation and done the same. Make sure that you also leave the field names box ticked, this can be seen at the bottom of the screen in the wizard. Failure to do so will result in the spreadsheet having no column headers and you will not be able to clearly see which fields from the database the columns relate to.

Select field separator

Export files are created with a specific character separating each field of a record. What character do you want to use?

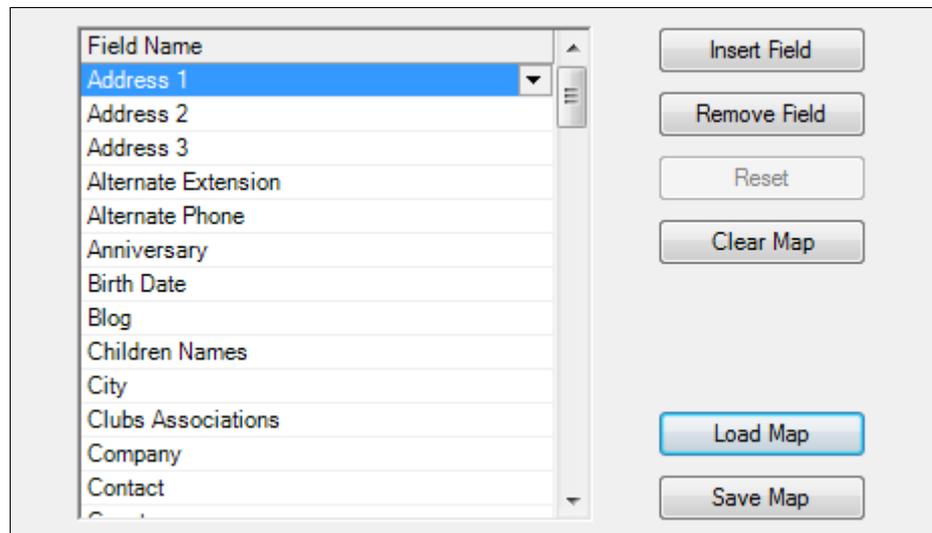
Comma
 Tab

Do you want to export field names?

When exporting records, you have the option to include field names from the current database.

Yes, export field names

Select **Next** to move forward and at the next screen and choose the fields that you wish to see in your spreadsheet. Click remove field to take out any fields you do not need, and add field to put any in that you do. If you accidentally take a field out click the add field option to place it back in the export routine. Make sure you include your notes field at this point:



Notice at this point you are also able to Load or Save a map. If you are going to perform this same export over and over again, it is worth saving the map. By doing so next time you export you will have it ready to load at this point, this will save you from having to use the Insert/Remove field function every time you do the export.

Tip: If you save a map, ensure you save it to the database folder within ACT! I would recommend that you create an export routine folder in your ACT! folder structure on the server.

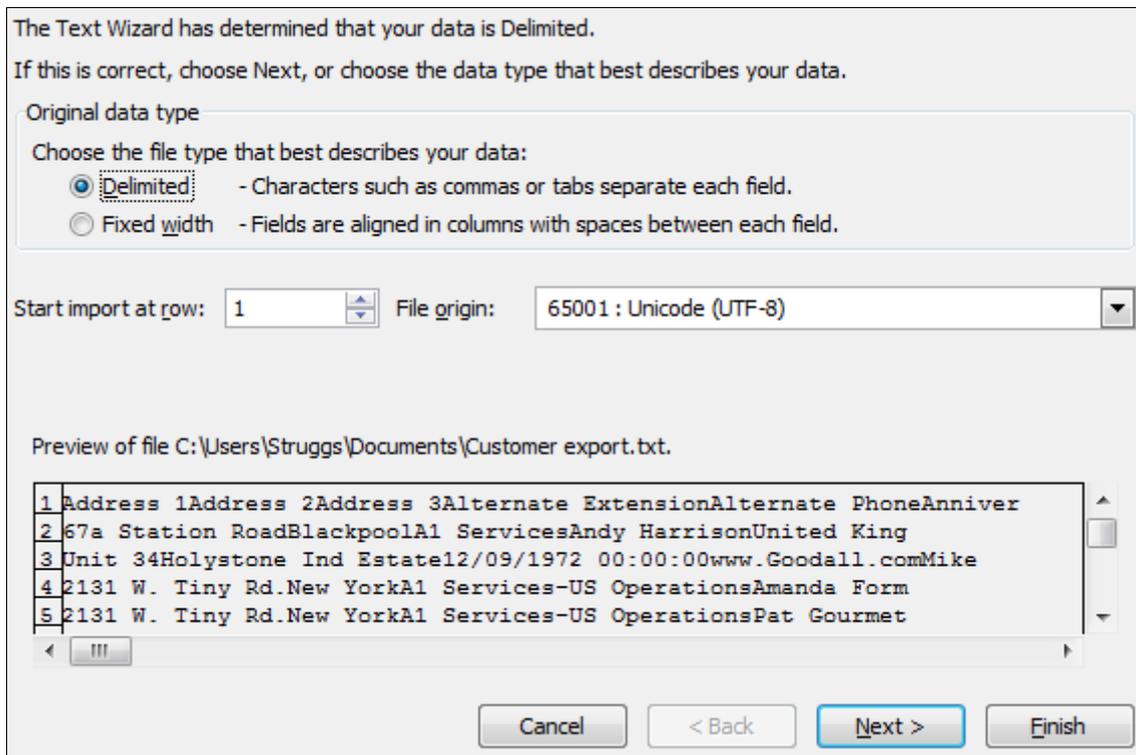
At the final screen, check the details if you wish and then click finish. The data will export to a text delimited or csv file depending on the choices that you made during the export.

Viewing your data in Excel

To view your newly exported data open Excel and using the **File > Open** function locate the data file that was exported. It is very important that once you open the location where you saved your file, you also choose to view **All Files** whilst looking for the file you created. By default Excel wants to open an Excel file, however you saved the file as text delimited and therefore the format is different, it is a plain text document at this point. Unless you change the file type you are looking for to All files you will not see the saved file:



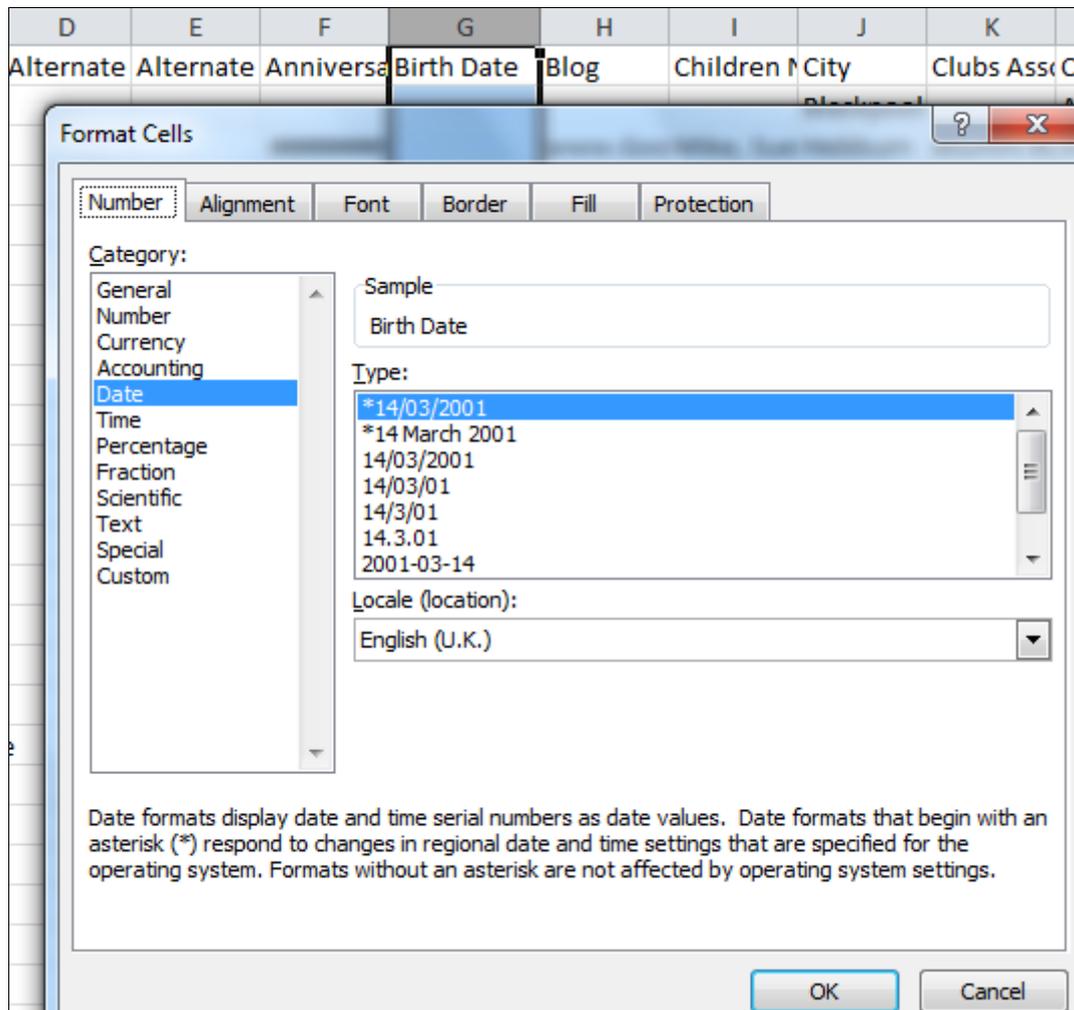
On opening your text file you will see the following wizard, Excel has worked out the file type and metrics of your file leave the settings it has automatically chosen for you:



Select **Next > Next** and then Finish and your Excel file will open. Any notes fields exported will also contain all their relevant data too.

Viewing your data in Excel

On completion of your export, any fields marked ##### are system fields from ACT! and they have been populated automatically as you have used your database. If you wish to view this data, highlight the relevant column, right click over the highlighted data and choose **Format**. Choose the relevant format for your data and select Ok, the data type will then reload correctly:



Now the export is complete, you can manipulate the data in excel however you wish. We would recommend at this point that you now save it as an Excel spreadsheet so that you regain all the full functionality of Excel. CSV and tab delimited files do not allow you to use formatting and other such functions to the same level as full Excel spreadsheets offer.