

First Movers Advantage, LLC  
How To Export From ACT!  
Updated: October 21, 2004

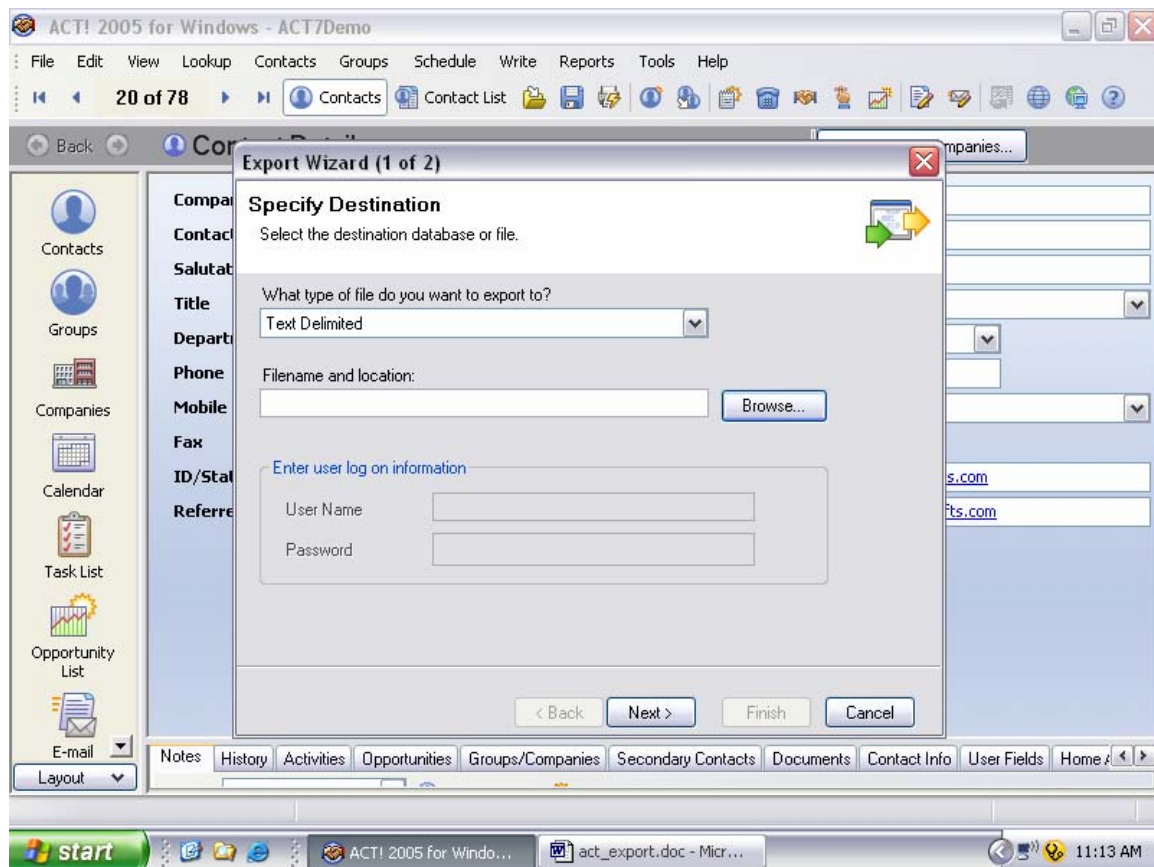
In order to use the Clairvoyance monitoring service, it is necessary to first export your contact 'watch' list from Act! This is a pretty simple process as shown in the instructions below. These instructions were created in Act! 2005 and Windows XP. If you are using a different version of Act! or windows, the screen shots shown here may be a little different. Regardless of software version, these instructions should give you the information you need to export your data. If you have questions, feel free to call Brian Long at 612-759-3755.

Step 1: Start Act! and open the database you would like to use in the Clairvoyance service.

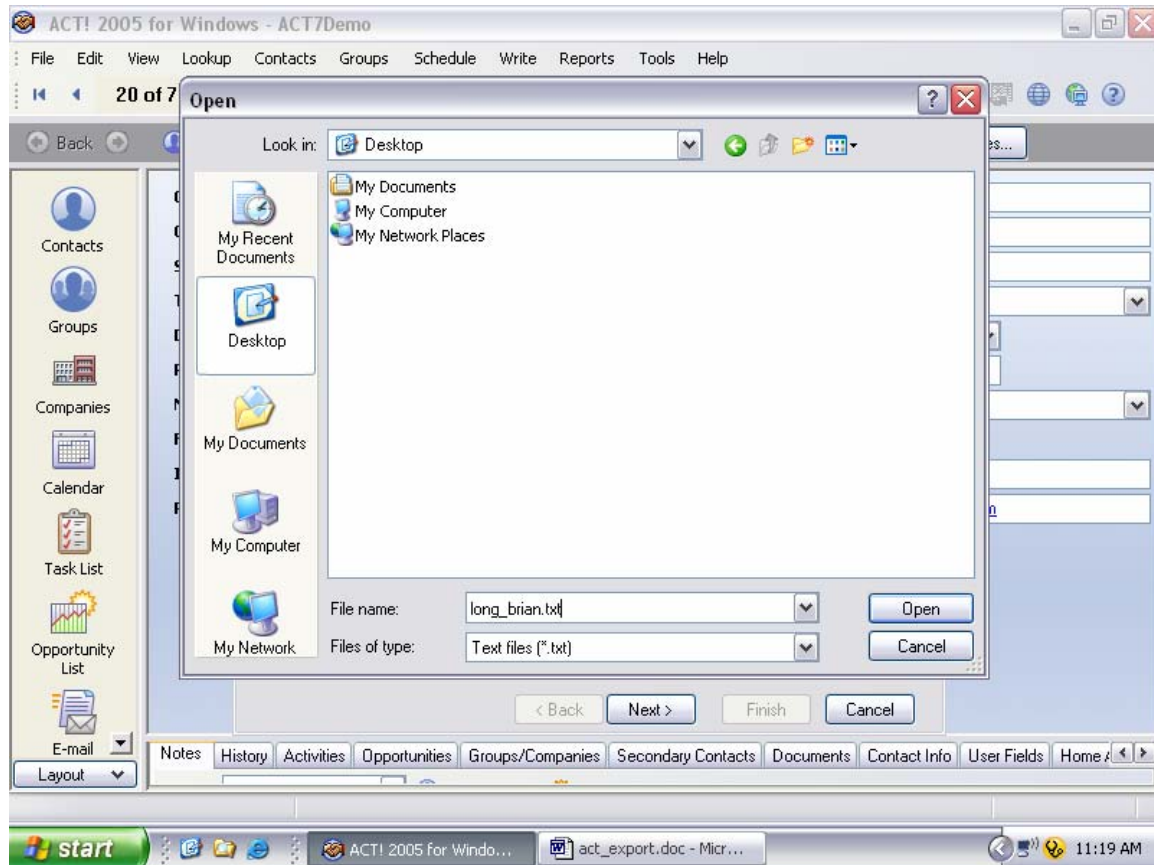
Step 2: If you would like to only use a specific subset of records (e.g. 'newsletter', or 'customers'), lookup that group, otherwise it is OK to skip this step.

Step 3: Using the menu bar at the top of the screen, select the 'File' menu. Then Select the 'Export' sub-menu.

Step 4: If you receive a window that says "File Export Wizard", hit the 'Next' button until you see a screen that looks something like this:



For the question that says ‘What type of file do you want to export to?’ select ‘Text Delimited’ from the drop-down box. For the filename and location, press the Browse button. You should see a screen that looks similar to this:

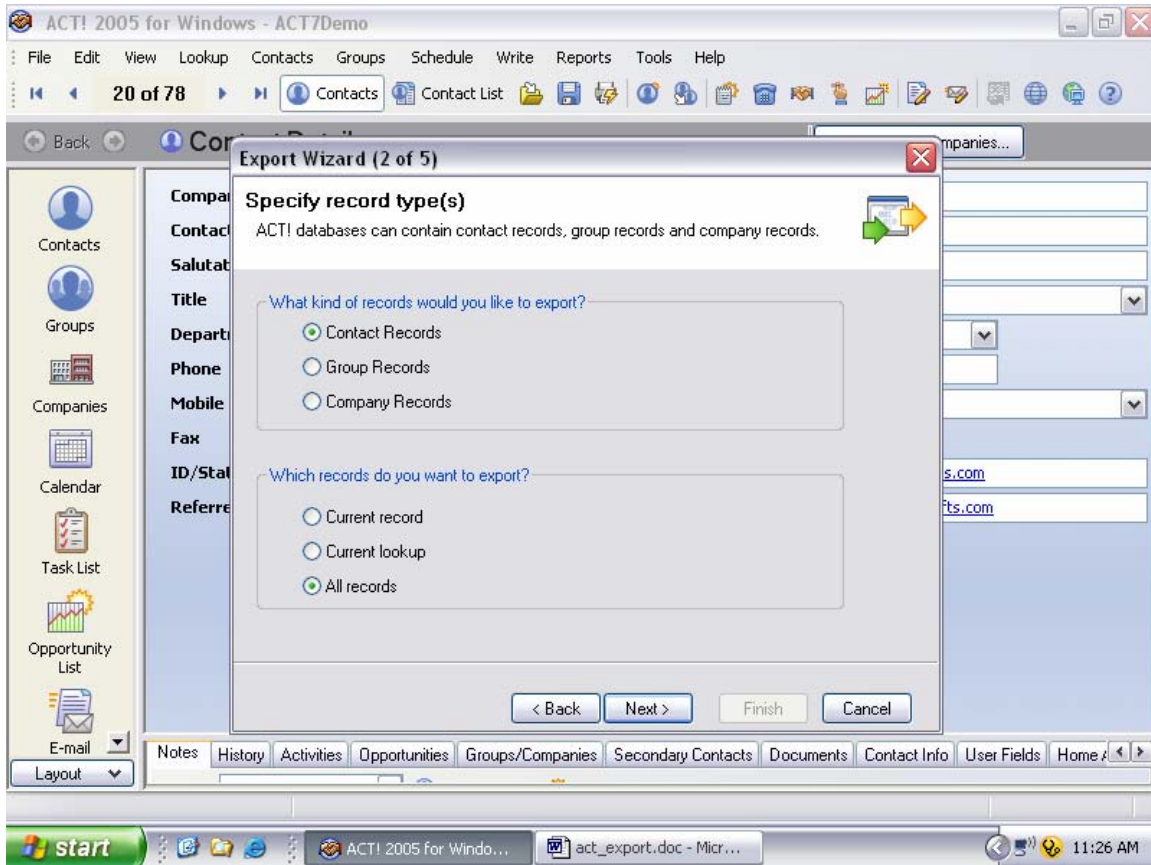


On this screen, you will need to do a few things:

- 1) Select ‘Desktop’ to save the exported file to your desktop.
- 2) In the box that says ‘File name:’ name the file using your last name, the underscore character, and your first name, then .txt on the end. For example, the file name for Brian Long will be ‘long\_brian.txt’.
- 3) Click the ‘Open’ button.

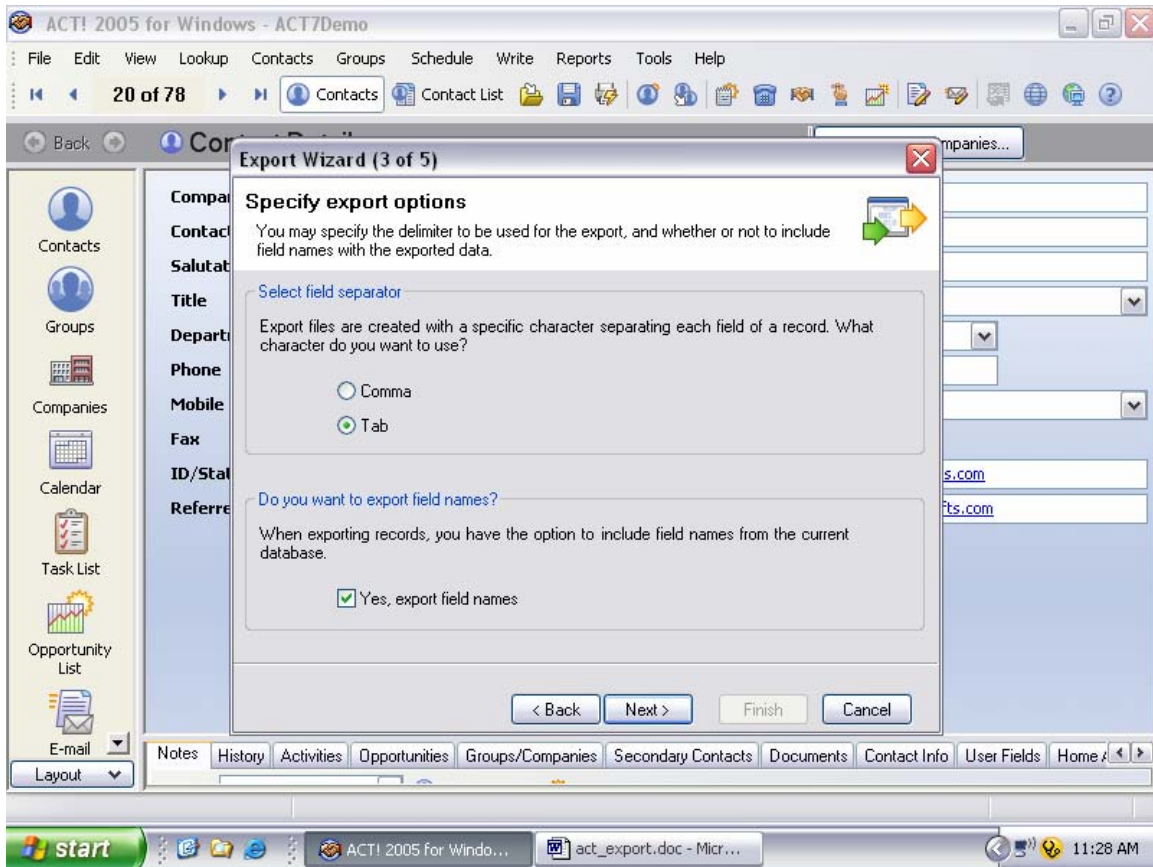
Step 5: After clicking the Open button, you should be returned to the previous screen where you will click ‘Next.’

Step 6: You should now be looking at a screen that asks you to specify the record types. Select 'Contact Records' and 'All records.' Note that if you only want to export the current lookup (see Step 2 above), then you should select 'Current lookup.' This screen is shown below.



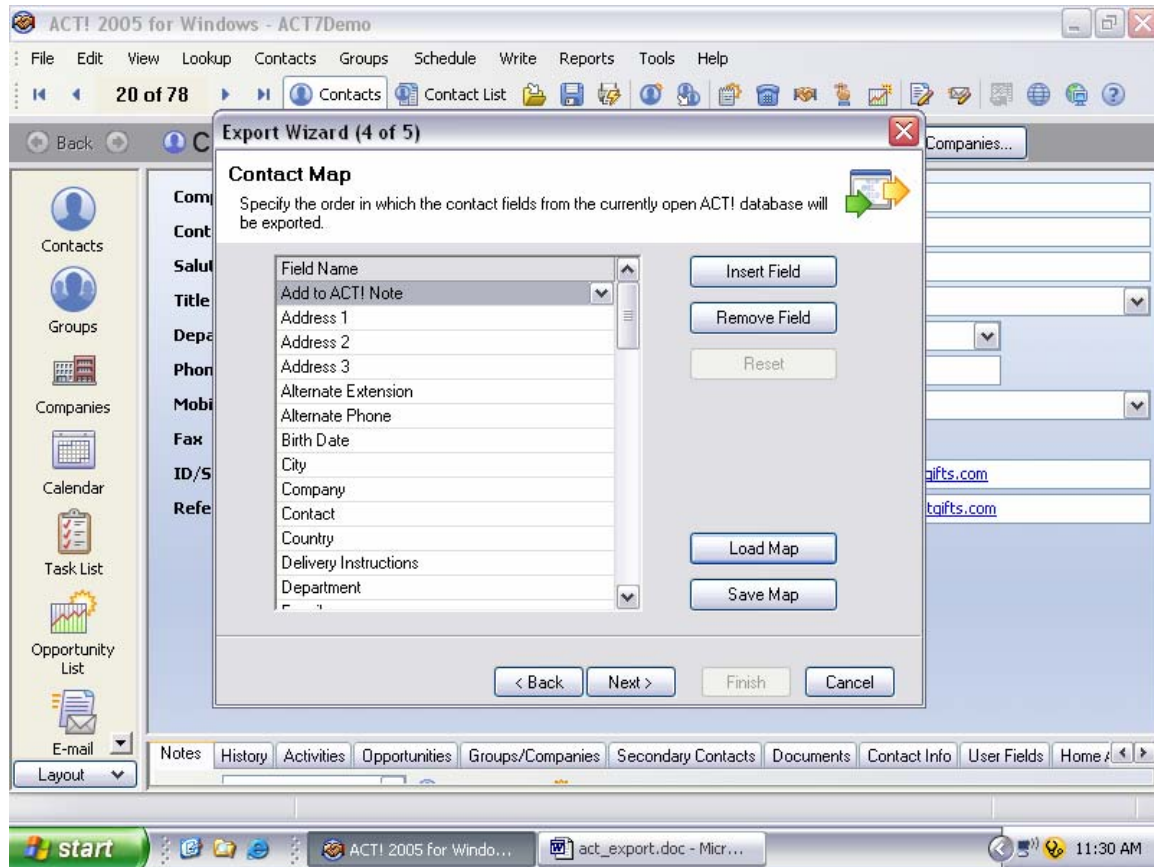
Click 'Next' to move to the next screen.

Step 7: In this step, you will specify the export options. Select 'Tab' as the field separator and check the box to indicate 'Yes, export field names'. This step is shown below:



Click Next to move to the next screen.

Step 8: The next screen will ask you to specify the order in which contacts will be exported.



You do not need to do anything here. Just hit 'Next.'

Step 9: The final export step is to review the information you just entered and hit 'Next.' Act! will now export your list on to your desktop. You will see a status bar that shows export progress and tells you when the export is done.

Step 10: The final step is to e-mail the file to the designated person in your firm. If your firm has not designated a person to do this, then send an e-mail to [brian.long@firstmoversadvantage.com](mailto:brian.long@firstmoversadvantage.com) with the text file you just created as an attachment

Again, please feel free to call Brian Long with questions at 612-759-3755.

Thanks for your business.