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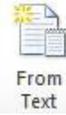
For your convenience, we have made instructions available to assist you with importing your data. Please select the link below that corresponds to the program you wish to import your data. If you need any further assistance, feel free to contact our office at 985-809-0600. We would be happy to assist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

## **Contents**

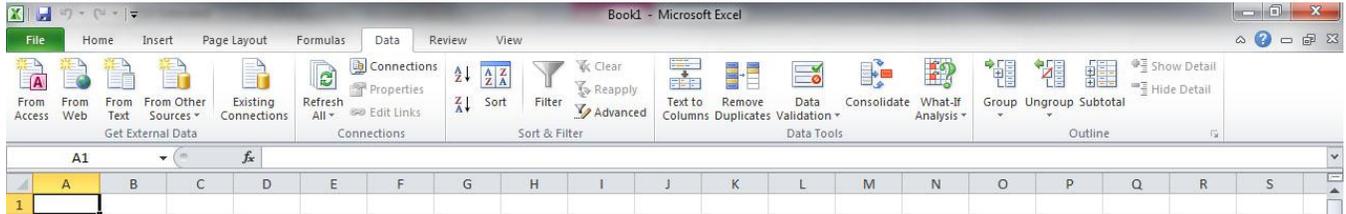
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## OPENING A LEADS.TXT FILE IN EXCEL 2010

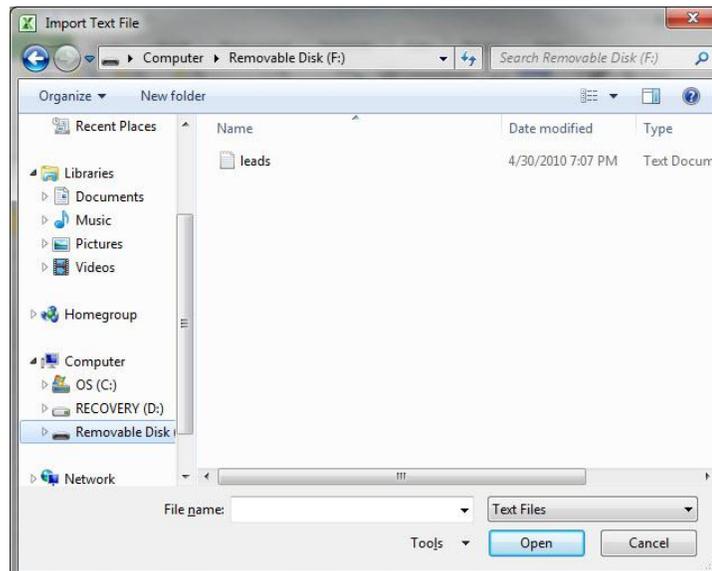
1. Open **EXCEL**.
2. Insert the **USB FLASH MEMORY DRIVE** in an available USB port on your computer.



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.



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)

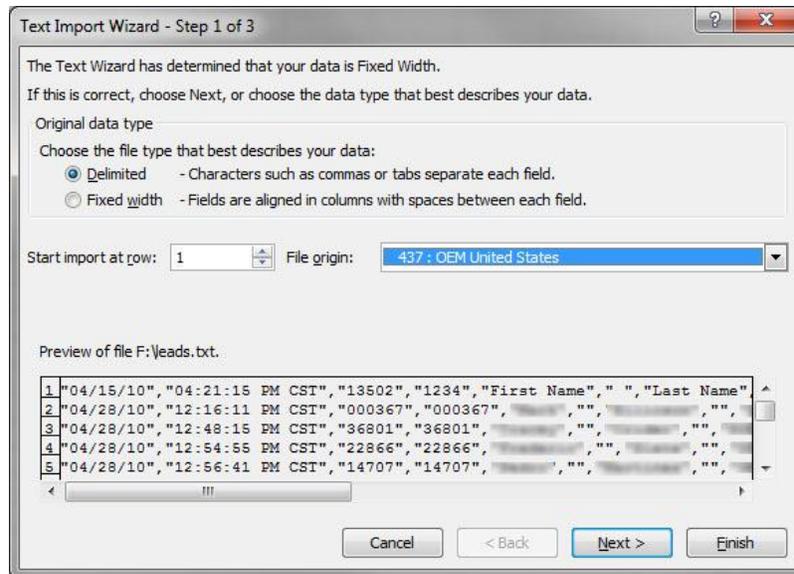


Figure 1

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)

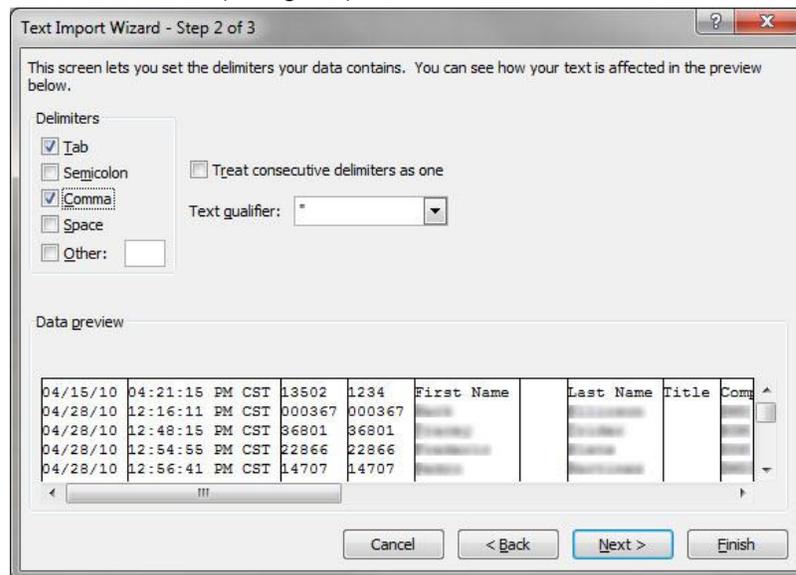


Figure 2

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)

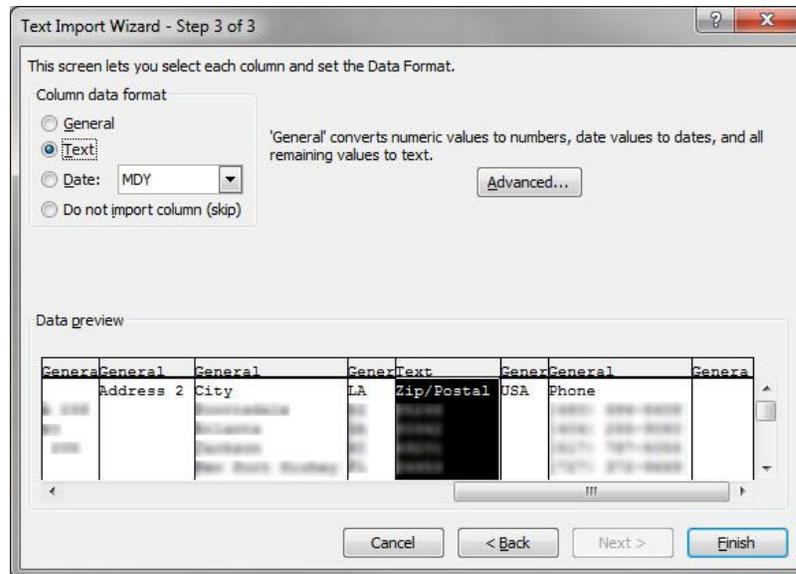
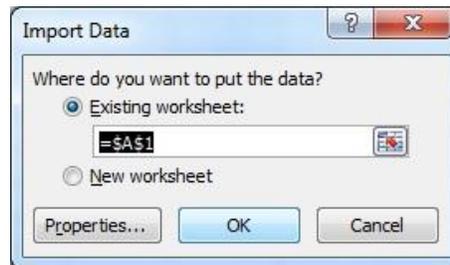


Figure 3

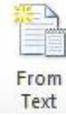
15. Click on the **GENERAL** header of the Zip Code field, this will select the entire Zip Code column. Choose: **TEXT** using the buttons at the top right of the window (Column Data Format) (See Figure 3)
16. Click the **FINISH** button. (See Figure 3)
17. The Text Wizard window will close and Excel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



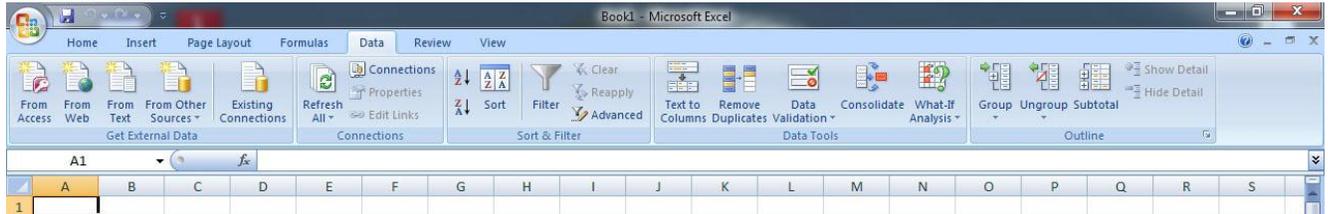
18. Select all of the data by clicking on the gray box above the [1] column and next to row [A]. This will select all of the data on the spreadsheet.
19. Go to the top menu, Choose: **FORMAT, COLUMN, AUTOFIT SELECTION**. You are now ready to view and use the lead data.

## OPENING A LEADS.TXT FILE IN EXCEL 2007

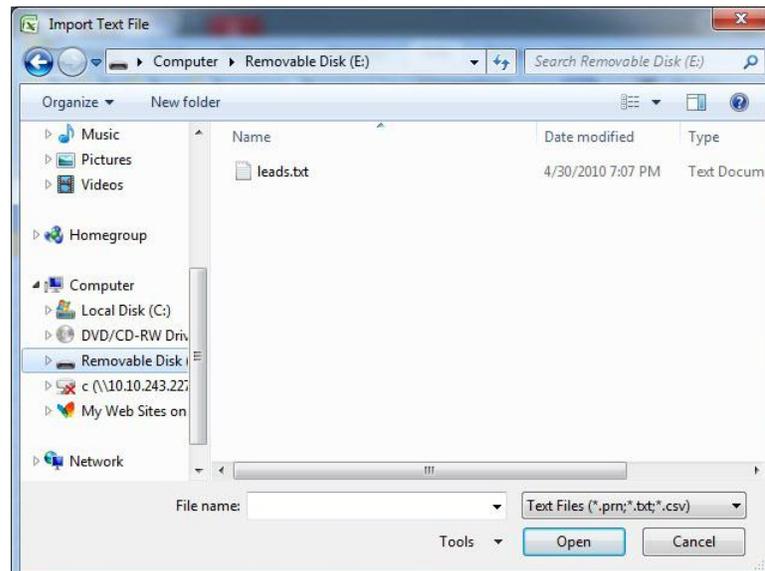
1. Open **EXCEL**.
2. Insert the **USB FLASH MEMORY DRIVE** in an available USB port on your computer.



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.



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)

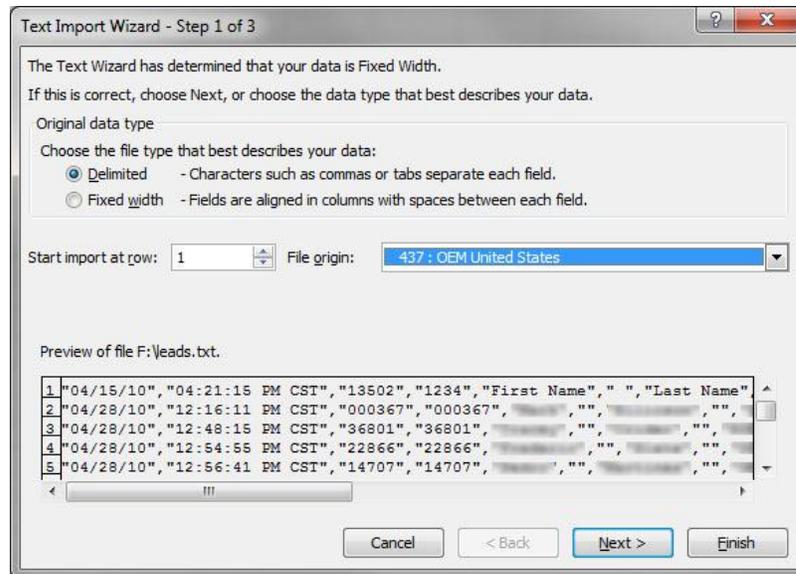


Figure 1

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)

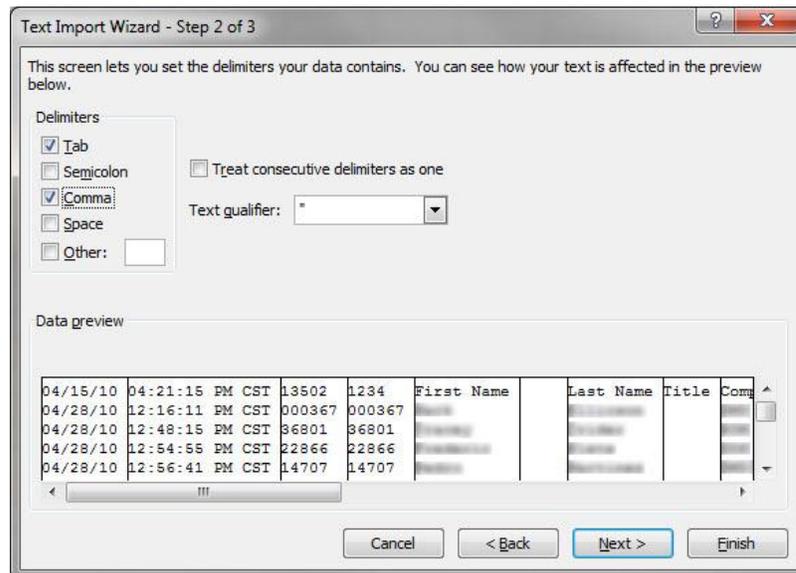


Figure 2

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)

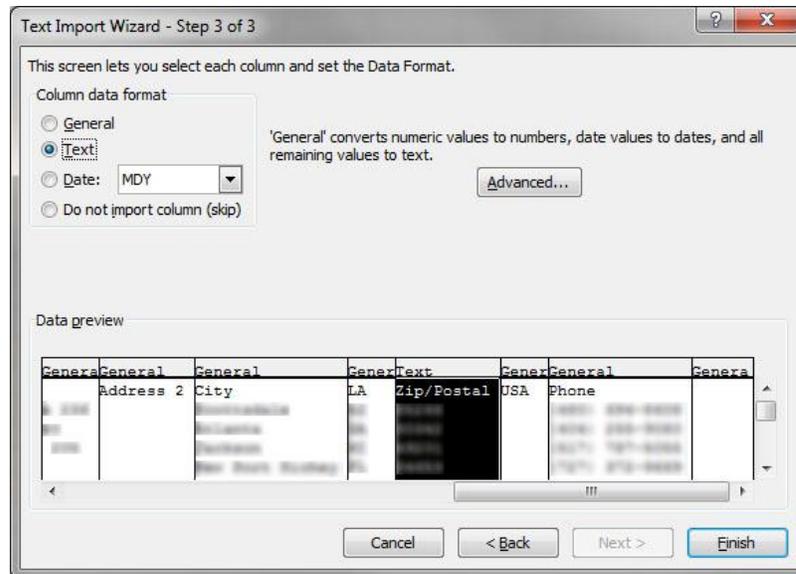
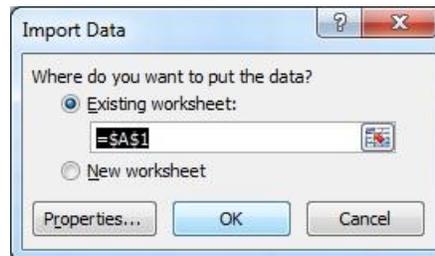


Figure 3

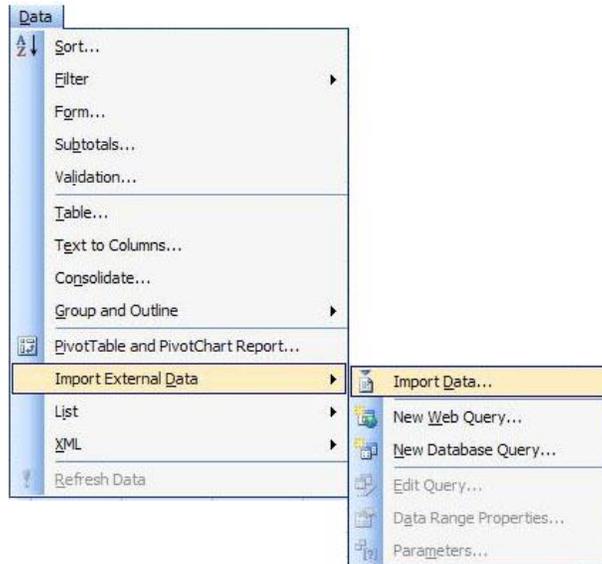
15. Click on the **GENERAL** header of the Zip Code field, this will select the entire Zip Code column. Choose: **TEXT** using the buttons at the top right of the window (Column Data Format) (See Figure 3)
16. Click the **FINISH** button. (See Figure 3)
17. The Text Wizard window will close and Excel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



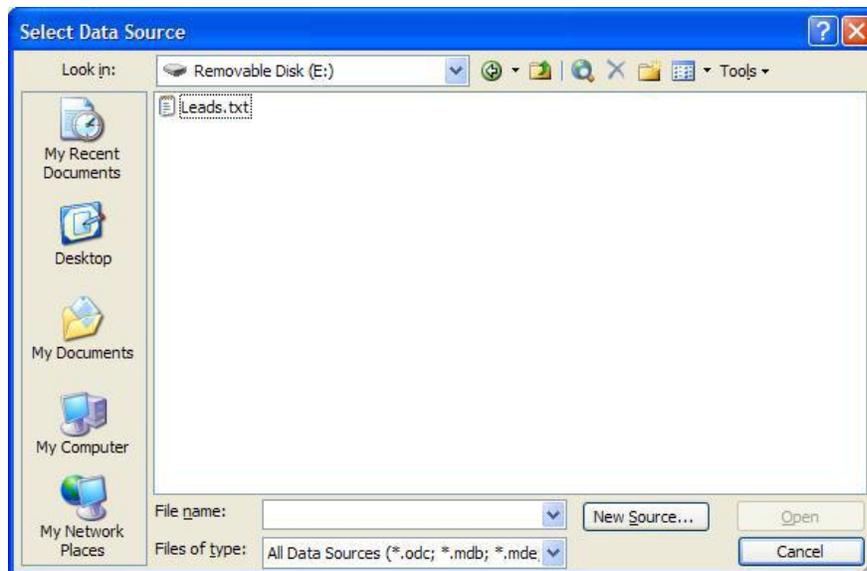
18. Select all of the data by clicking on the gray box above the [1] column and next to row [A]. This will select all of the data on the spreadsheet.
19. Go to the top menu, Choose: **FORMAT, COLUMN, AUTOFIT SELECTION**. You are now ready to view and use the lead data.

## 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 ...**



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.



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)

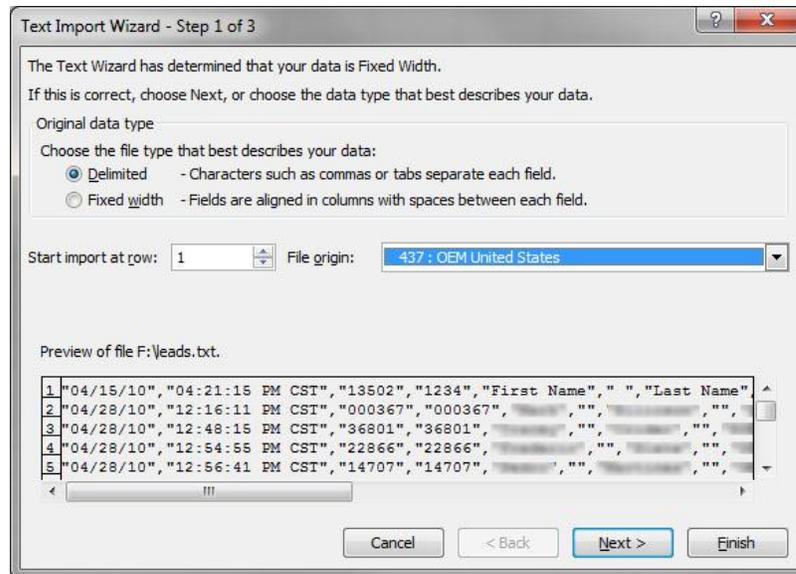


Figure 1

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)

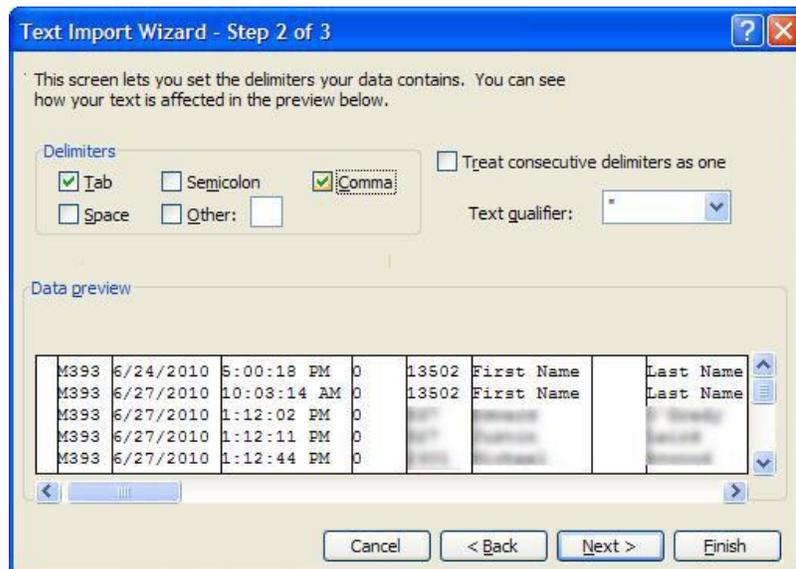


Figure 2

11. **TREAT CONSECUTIVE DELIMITERS AS ONE** should 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)

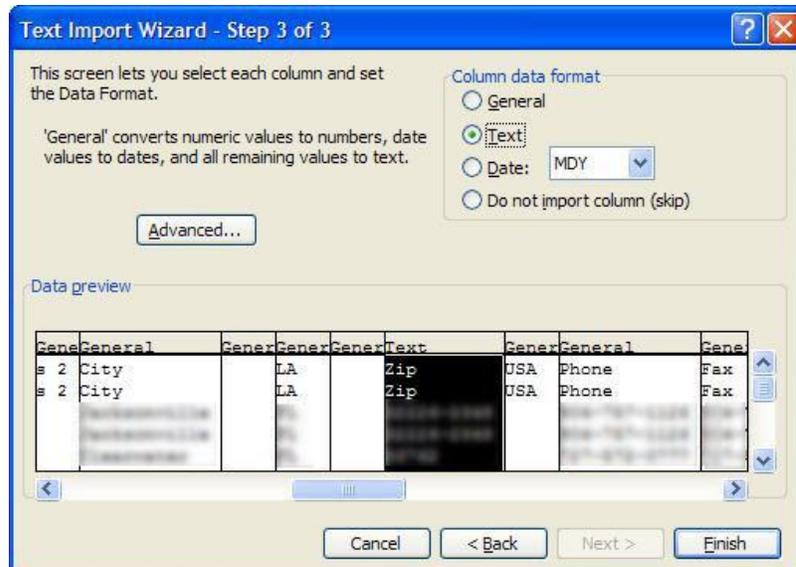
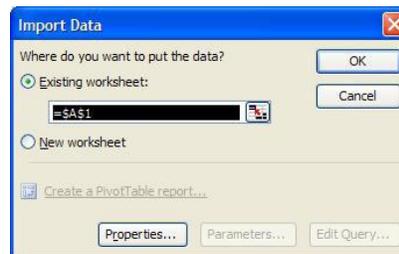


Figure 3

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.



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.

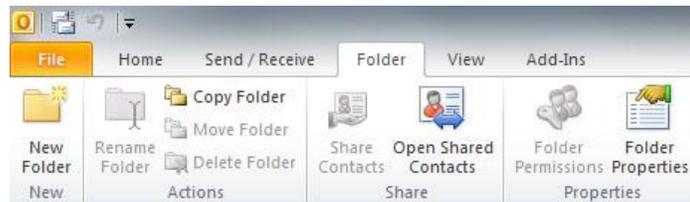
## OPENING A LEADS.TXT FILE IN OUTLOOK 2010

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.

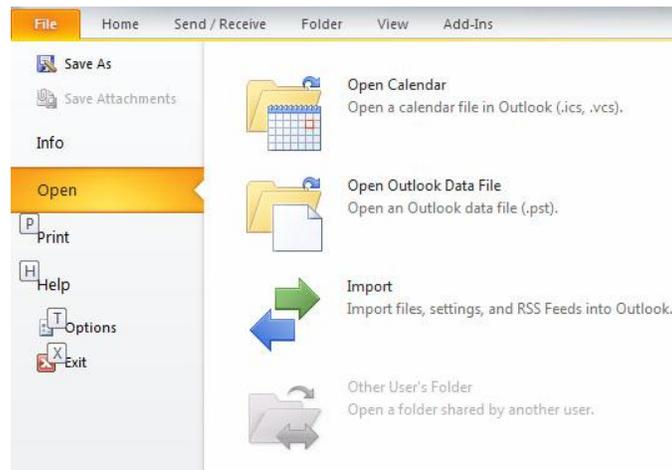
1. Open **OUTLOOK**

2. Click on the **CONTACT** icon  on the left side of the window.

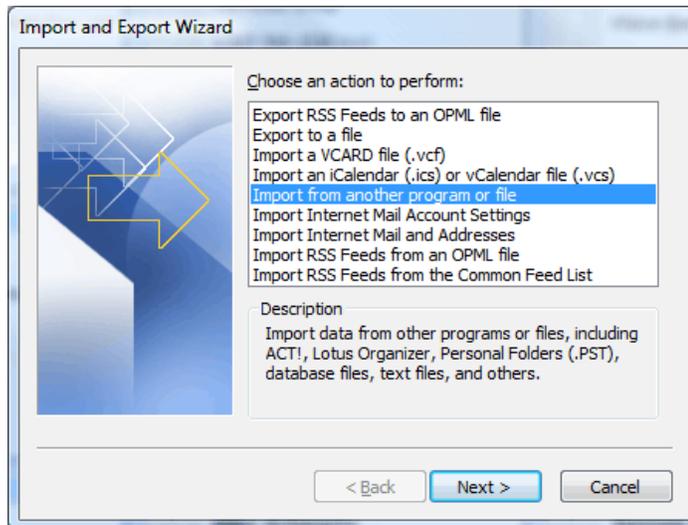
3. Click on the **Folder** tab and click on the option **New Folder** 



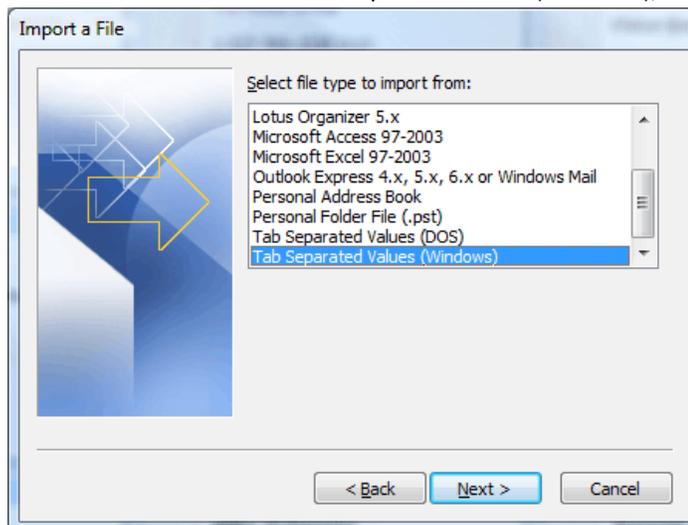
4. Create New Folder window pops up. Name the folder (example: Use the name of the show). Click **OK**.
5. Now choose in the menu at the top **FILE > OPEN>IMPORT**. The Import and Export Wizard windows will open.



6. Choose **IMPORT FROM ANOTHER PROGRAM OR FILE** from the selections. Click the **NEXT>** button.

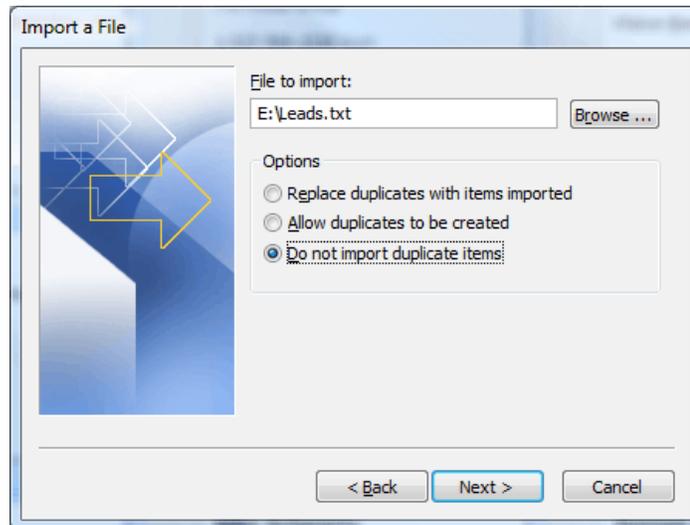


7. In **SELECT FILE TYPE TO IMPORT FROM:** Choose Tab separated values (Windows), Click **NEXT>**

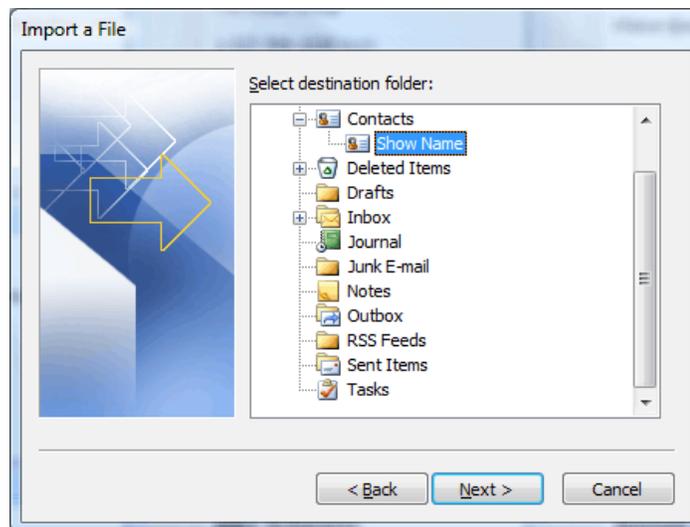


8. To select **FILE TO IMPORT:** Click the Browse Button and choose "**Removable Drive**" and select the **LEADS.TXT** file. Go to the very bottom and choose **TAB SEPERATED VALUES (WINDOWS)**. Click the **OK>** button.

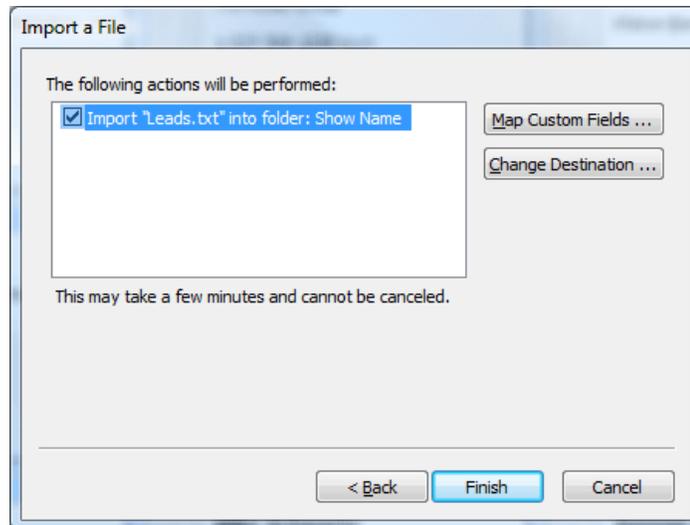
9. Click **DO NOT IMPORT DUPLICATE ITEMS** radio button. Click the **NEXT>** button.



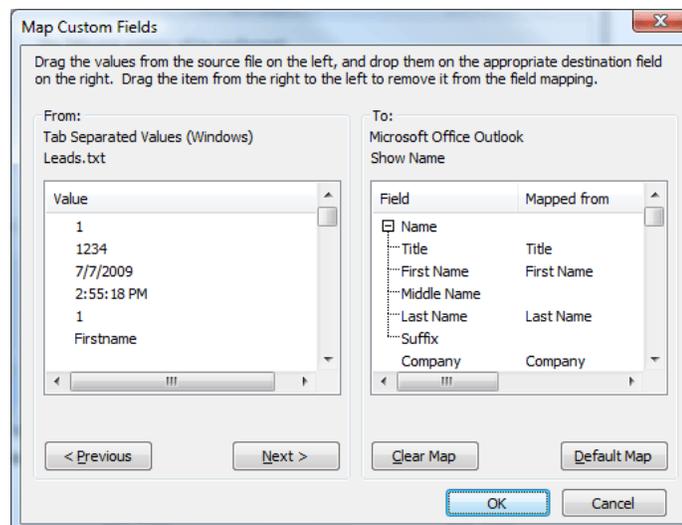
10. Double click on the folder that you created in Step 4 found under the Contacts list. If the folder is not displayed, click on the plus (+) sign next to Contacts and the expanded tree displays all of the sub folders under Contacts.



11. 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**.



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).



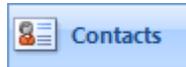
If the contact's information does not appear in the window to the right, click on it in the value column and drag it over to the corresponding word on the right side to add the leads information. Complete all information including Company, Address through Email if included. NOTE: We found that it is 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.

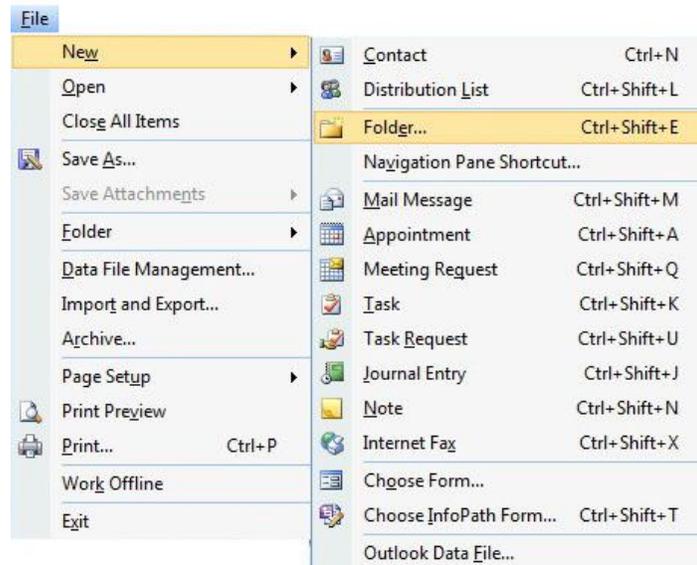
## OPENING A LEADS.TXT FILE IN OUTLOOK 2007

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.

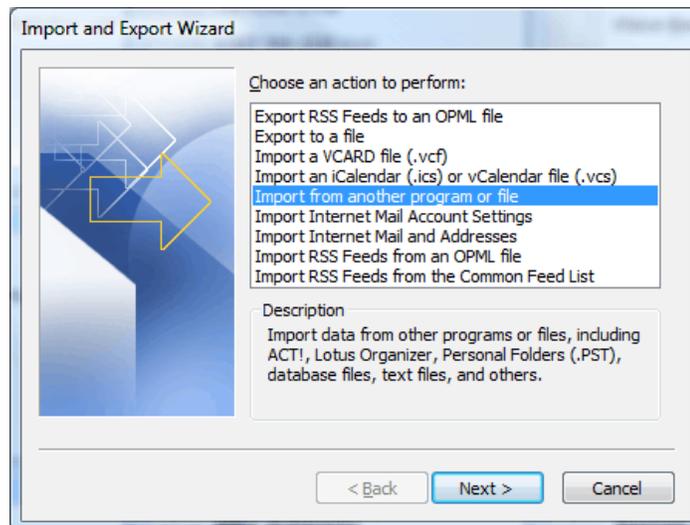
1. Open **OUTLOOK**



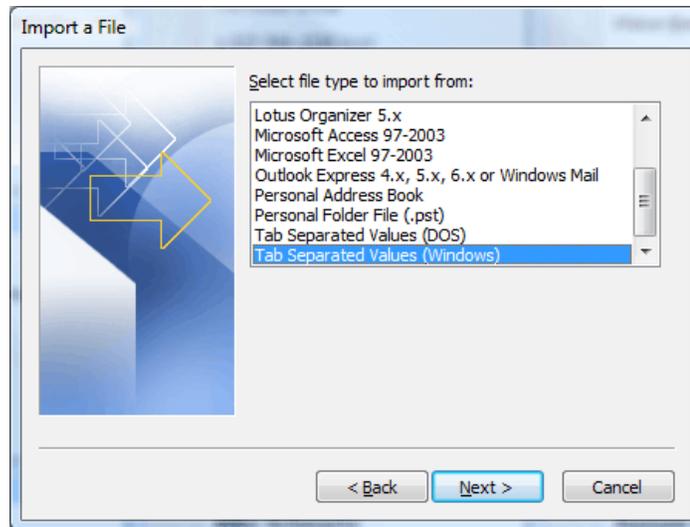
2. Click on the **CONTACT** icon on the left side of the window.
3. At the top of the window, Choose **FILE > NEW > FOLDER**



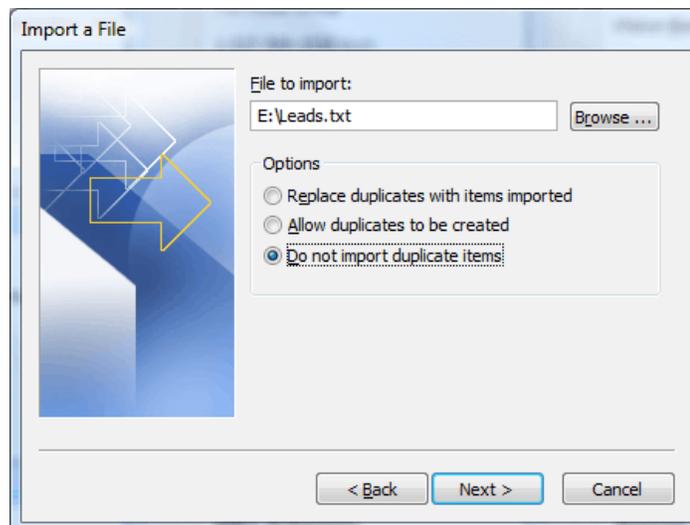
4. Create New Folder window pops up. Name the folder (example: Use the name of the show). Click **OK**.
5. Now choose in the menu at the top **FILE > IMPORT AND EXPORT**. The Import and Export Wizard windows will open.
6. Choose **IMPORT FROM ANOTHER PROGRAM OR FILE** from the selections. Click the **NEXT>**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



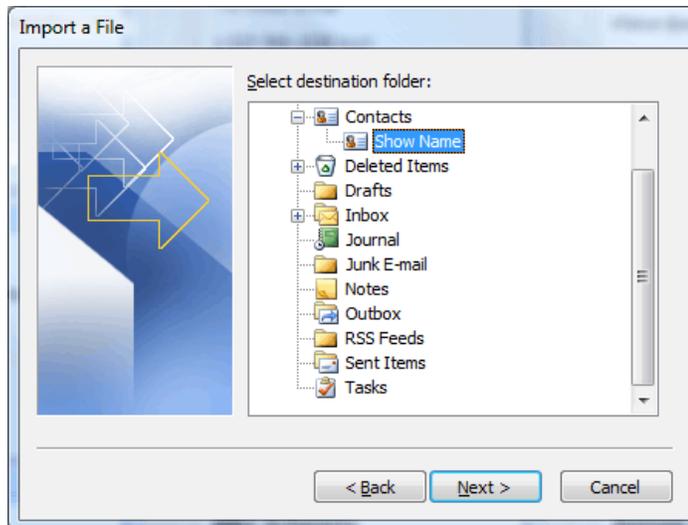
7. In **SELECT FILE TYPE TO IMPORT FROM**: Choose Tab separated values (Windows), Click **NEXT>**



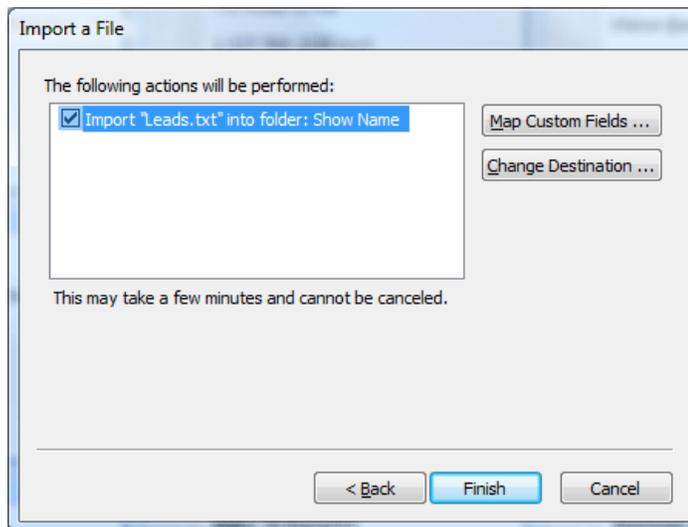
8. To select **FILE TO IMPORT**: Click the Browse Button and choose "**Removable Drive**" and select the **LEADS.TXT** file. Go to the very bottom and choose **TAB SEPERATED VALUES (WINDOWS)**. Click the **OK>** button.
9. Click **DO NOT IMPORT DUPLICATE ITEMS** radio button. Click the **NEXT>** button.



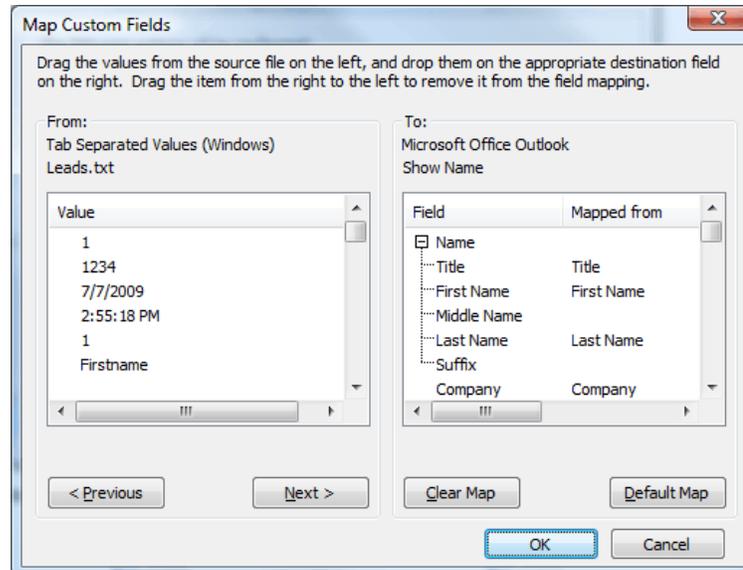
10. Double click on the folder that you created in Step 4 found under the Contacts list. If the folder is not displayed, click on the plus (+) sign next to Contacts and the expanded tree displays all of the sub folders under Contacts.



11. 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**.



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).



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.

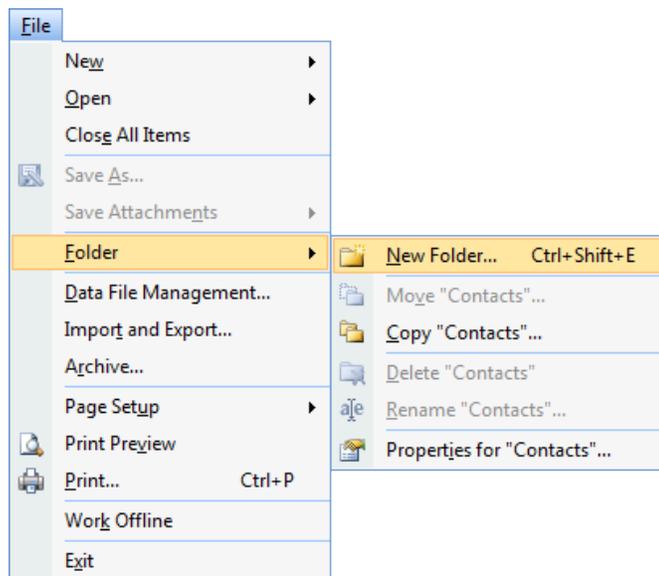
## OPENING A LEADS.TXT FILE IN OUTLOOK 2003

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.

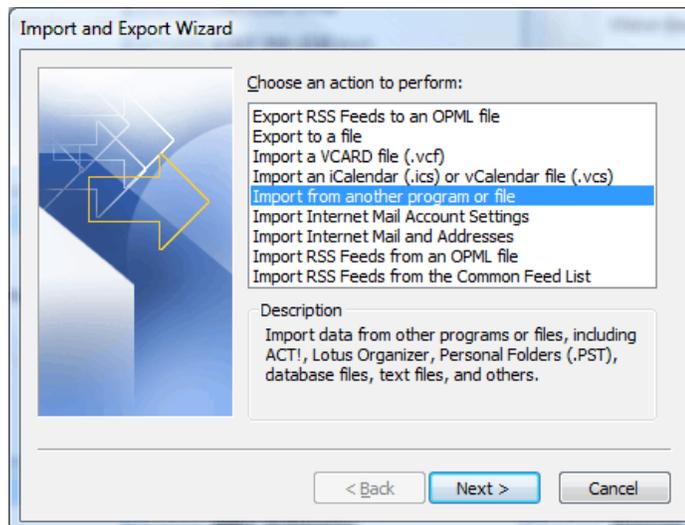
1. Open **OUTLOOK**



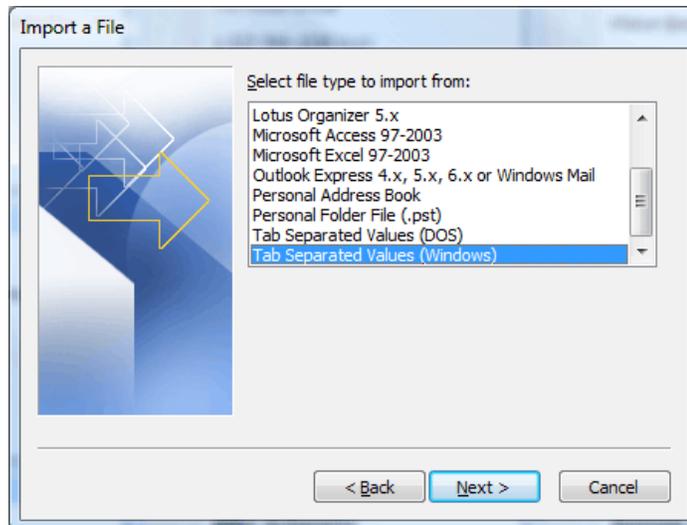
2. Click on the **CONTACT** icon on the left side of the window.
3. At the top of the window, Choose **FILE > FOLDER > NEW FOLDER**



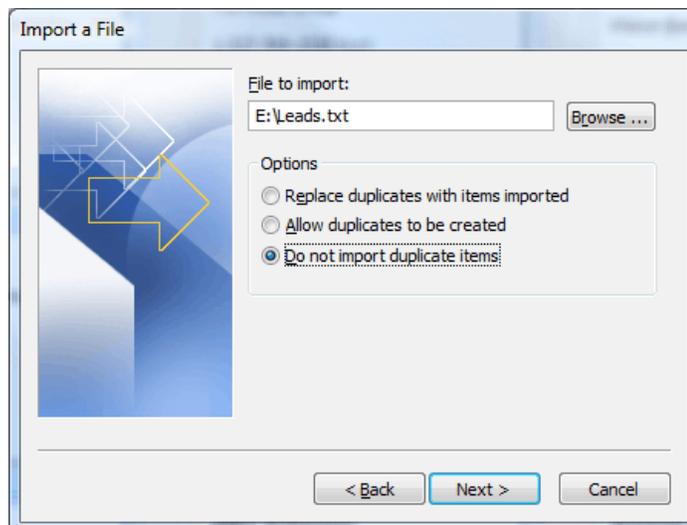
4. Create New Folder window pops up. Name the folder (example: Use the name of the show). Click **OK**.
5. Now choose in the menu at the top **FILE > IMPORT AND EXPORT**. The Import and Export Wizard windows will open.
6. Choose **IMPORT FROM ANOTHER PROGRAM OR FILE** from the selections. Click the **NEXT>**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



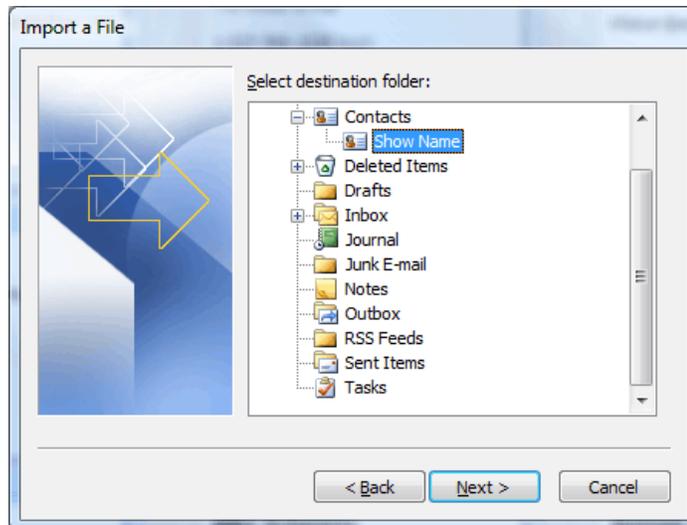
7. In **SELECT FILE TYPE TO IMPORT FROM**: Choose Tab separated values (Windows), Click **NEXT>**



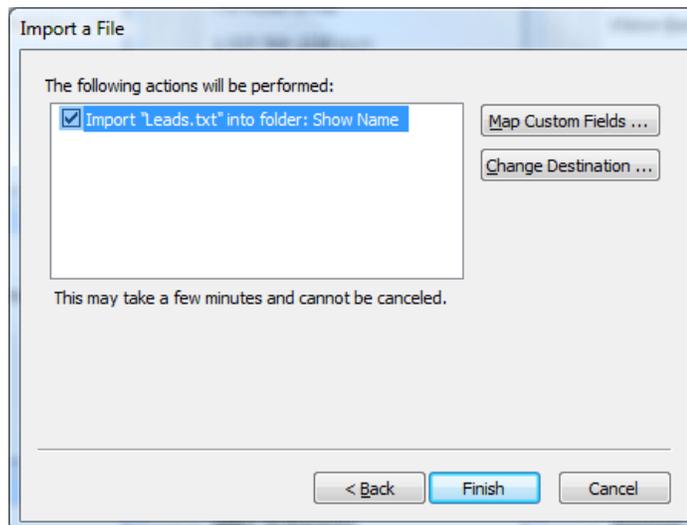
8. To select **FILE TO IMPORT**: Click the Browse Button and choose "**Removable Drive**" and select the **LEADS.TXT** file. Go to the very bottom and choose **TAB SEPERATED VALUES (WINDOWS)**. Click the **OK>** button.
9. Click **DO NOT IMPORT DUPLICATE ITEMS** radio button. Click the **NEXT>** button.



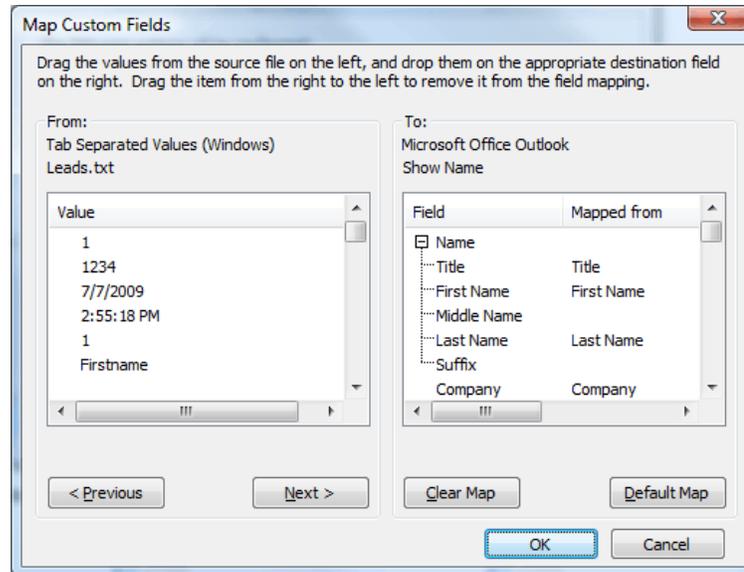
10. Double click on the folder that you created in Step 4 found under the Contacts list. If the folder is not displayed, click on the plus (+) sign next to Contacts and the expanded tree displays all of the sub folders under Contacts.



11. 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**.



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).



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.