

# Manual

# ACTcess

Datatransfer from ACT!  
to Microsoft Access



**CRM-SERVICE**.com

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## What is ACTcess?

ACTcess transfers an ACT! database to an Microsoft Access database.

All ACT! data will be transferred completely:

- Contacts
- Notes/histories
- Activities
- Sales opportunities
- Groups

After the transfer from ACT! To Access you have all your ACT! Data in Microsoft Access. 100%

The transfer is only one way from ACT! to Access. For the other direction CRM-Service provides different ACT! addons.

ACTcess is tested with:

- ACT! 5 / 2000 German / English
- ACT! 6 German / English
- Microsoft Access 97 / 2000 / 2002 (XP) / 2003

Microsoft Access does not necessarily be installed on the computer you use ACT!cess with. But ACT! has to be installed.

## Who needs ACTcess?

The transfer from ACT! to Access is useful for:

- Creation of very detailed reports of your ACT! data in Access
- Access to your ACT! data by another application via Microsoft Access
- Data transfer of your ACT! data to another application

## Something about the free trial version

The free trial version has all the same functions as the full version but transfer is limited to 100 record sets each table, that means maximal 100 contacts, 100 notes/histories etc.

Please note that you cannot use ACT!cess together with the free 30 days trial version of ACT!

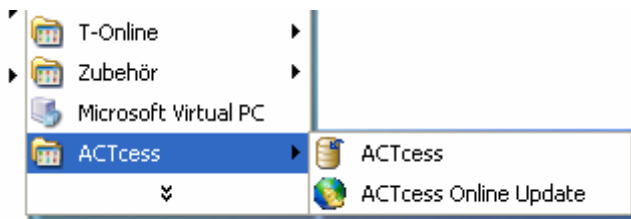
## Installing ACTcess

Make sure you are logged on as administrator to your local windows PC. Close all other applications before you start the installation.

To install doubleclick on the setup file that you have received and follow the instructions.



After installation you have a folder “ACTcess” in your windows start menu. We recommend to start the ACTcess Online Update to get the latest version.



Now you have a free trial version installed. Proceed with the next chapter to register your product and get a full version.

## How to register ACTcess

To get a full version you need to get a registration key. This can be obtained by sending an email to [info@crm-service.com](mailto:info@crm-service.com) . You may also ask your local ACT! Certified Consultant (ACC) or ACT! Authorized Reseller (AAR).

One doubleclick on the reg-file and your product is a full version.

To get more information about your product registration and about ACTcess you may click on the about-button in the ACTcess configuration.



## Online update

We recommend to start the online update on a regular basis for CRM-Service always works on product improvement to integrate more functions.

Even this manual will be updated.

Choose the update button in the windows start menu or in the ACTcess configuration.

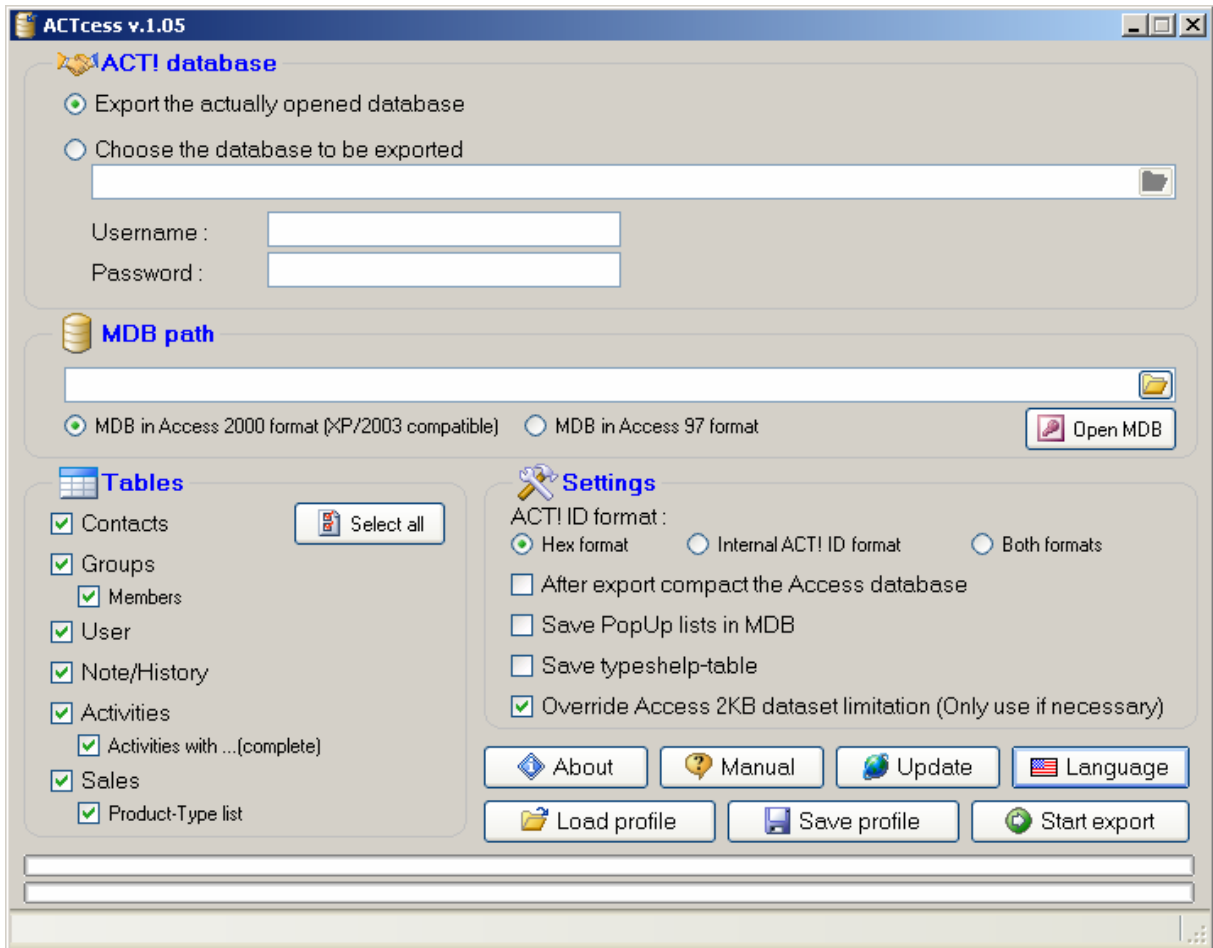


*Start, Programs, ACTcess, ACTcess Online Update*

## Handling & Configuration

Start ACTcess via *Start, Programs, ACTcess, ACTcess*

In the **ACT! database** part you can choose the ACT! database together with the necessary login data or you can choose the ACT! database that is opened right now. You don't need login data in this case.



In the **MDB path** area you can select an existing Microsoft Access database or you can create a new one if you enter path and name of a not existing database.

Don't forget to choose the Access database format (97, 2000/2002/2003).

In the **tables** area you may select single tables to be exported or you can select all of them.

The settings part is useful for advanced configuration:

- You can choose the format of the transfer of the ACT! unique ID:  
Hex format, for example. A31F32998873C32E  
Internal ACT! format, for example -,L# 7Z<F]
- You can also choose to export all the ACT! dropdown lists to Microsoft Access.
- ACTcess can create a translation table that contains descriptions for all the notes/histories type numbers such. For example type 1 = call completed, type 2 = call received, type 3 = field changed etc.

You can also start the manual, start the online update, change the language or work with profiles.

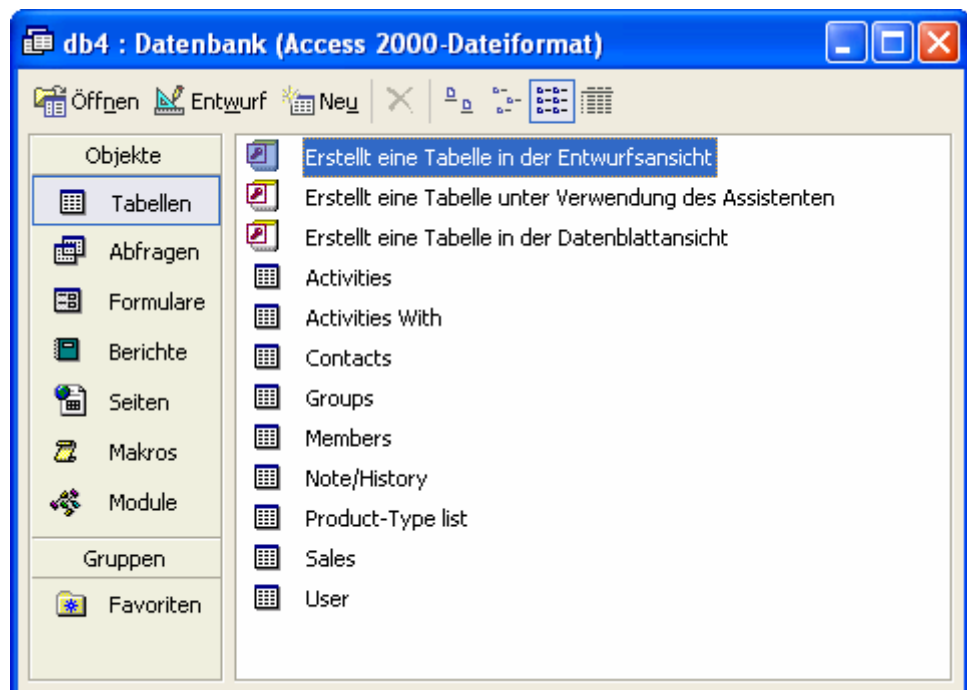
## Starting export

After doing all settings necessary you can start the transfer with the Start Export button.



This may take up to some minutes depending on the database file size and the tables you have selected.

As a result you may get a Microsoft Access database that – if opened – looks like this:



## Automation and Profiles

In order not to do all the configuration and settings after you restart ACTcess you can work with profiles. This means you do the configuration as described above and save these in a profile.



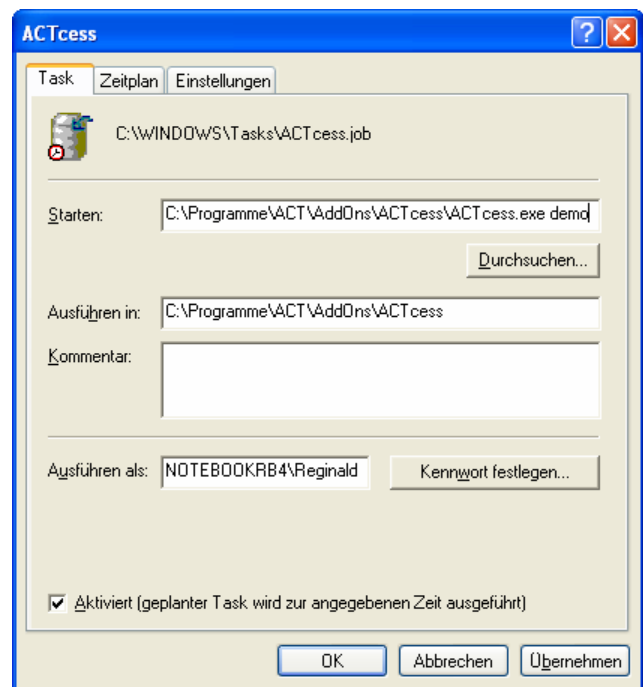
Once it is saved you can load it again by with the load profile button.



To do automatic exports you can use the Microsoft Windows Task Planer. You can add one profile as the start profile in this case.

To start the task planer go to *Start, Programs, Additions, System programs, Planned Tasks*. Configure it and add start profile as given in the example on the picture.

On this picture you see the advanced configuration of the Task Planer with the *demo* profile as start profile.



## Limitations of MS Access and how to handle them

Microsoft Access has 2 limitations compared to ACT!

These are:

- A maximum of 255 columns of each table
- Max. 2000 bytes for each recordset

They occur only in single ACT! databases or ACT! record sets.

Nevertheless, ACTcess provides handling of these limits:

If an ACT! contact table contains more than 255 fields (columns), the export table will be splitted to two or more tables in Microsoft Access. Each table contains the ACT! unique id as a key.

Microsoft Access has a limit of 2,000 bytes (e. g. 2,000 characters) for each record set. You can create an Access table with 100 character fields with a maximum length of 50 characters each. This means you can theoretically fill it with 5,000 characters but the actual limitation is 2,000 characters.

If an ACT! record set contains more than 2,000 characters they will be cut off.

It is not possible to create a forecast if this happens or not so ACTcess makes the export and if there is loss of data this will be shown in a separate table.

If so, you can ACTcess let the table split in two or more separate Access tables.

