

# Importing PinPointer® Data Into Act!

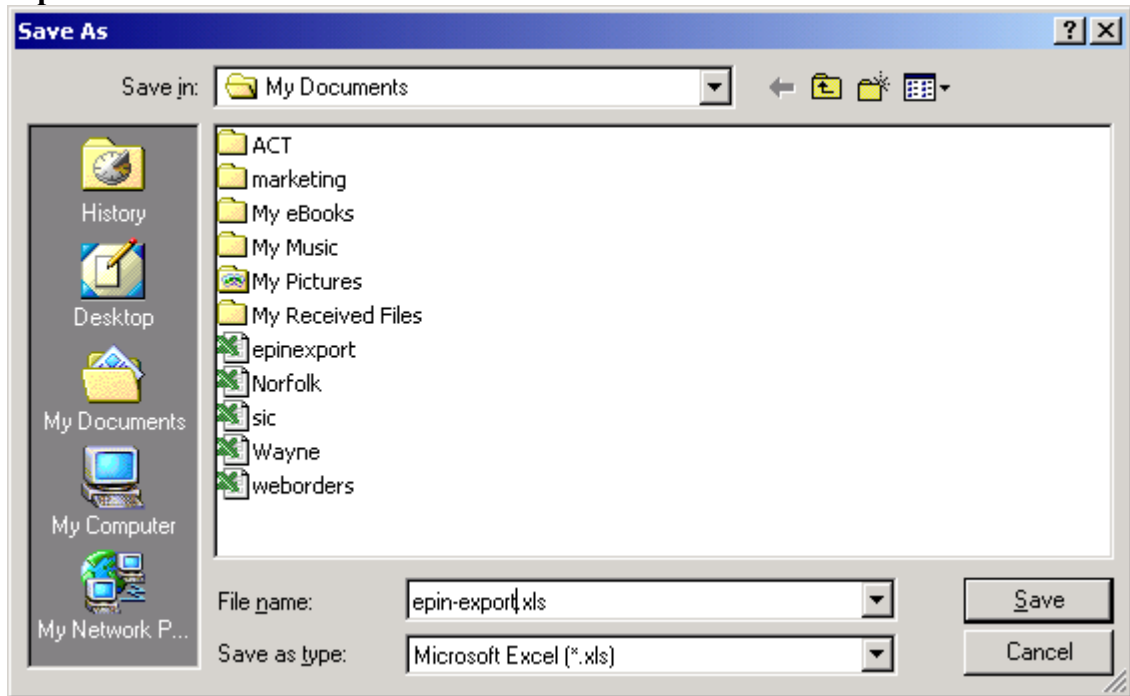
Note: These instructions were written for Act! 2000. Other versions may be different.

- 1) Export your ePinPointer data to Excel.
- 2) From the Search Criteria Screen click on “Save to Excel”

The screenshot shows the 'ePinPointer - Search Criteria' application window. On the left side, there are several search filters: 'Choose City (ies)', 'Choose Zip Code (s)', 'Choose Area Code (s)', 'Choose SIC Code (s)', 'Choose County (ies)', 'Number of Employees', 'Type of Product', 'Select Field', and 'Target Score and above'. Below these filters are 'Apply' and 'Undo' buttons. At the bottom left, there are fields for 'No of Companies' (set to 65) and 'Enter % of companies to be filtered out'. The main area is a table with columns: Company Name, Contact Name, Phone, City, EMP, and SIC. The table is sorted by EMP. The bottom toolbar contains buttons for 'Filter', 'Save to Excel', 'SIC Codes', 'Print Company Info', 'Print Mailing Labels', 'Customize Fields', 'Show all Companies', 'Plot on Map', 'Show Map Screen', and 'Exit'.

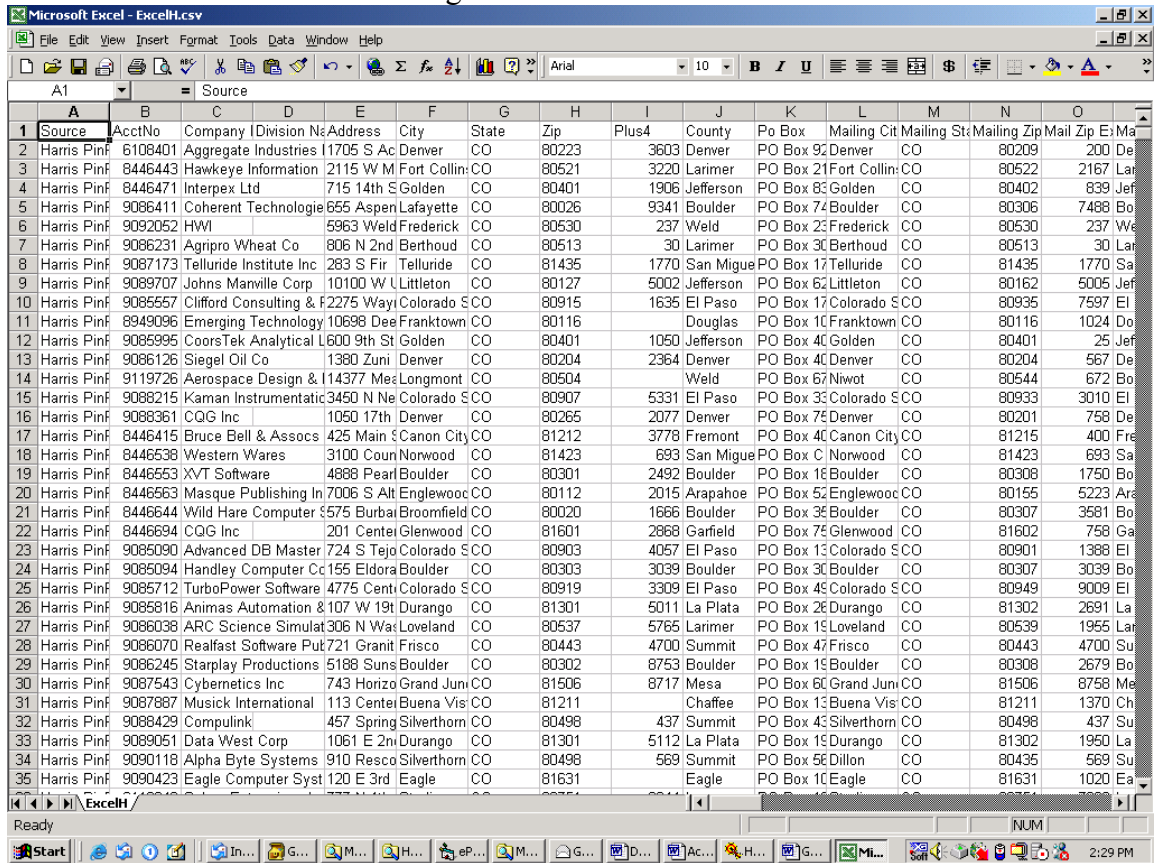
Company Name	Contact Name	Phone	City	EMP	SIC
Newell Rubbermaid	Phil Clouse	330-264-6464	Wooster	1600	3069
Gerstenslager	Tom Ashby	330-262-2015	Wooster	982	3465
Luk Inc	Raymund Heinen	330-264-4383	Wooster	800	3714
Crown North America	Mike Hooper	330-262-6010	Wooster	600	3714
Bosch Rexroth Corp	Larry Ouwerkerk	330-263-3300	Wooster	558	3594
Wooster Brush Co	James Riggs	330-264-4440	Wooster	500	3991
Frito-Lay Inc	Jim Barnard	330-262-1070	Wooster	350	2096
Stahl, Scott A. Fetze	Steve Rowe	330-264-7441	Wooster	350	3713
Akron Brass Co	Brian Hungerman	330-264-5678	Wooster	300	3569
Bell & Howell Public	Andy Wyszowski	330-264-6666	Wooster	300	2741
Arbortech	Keith Barr	330-264-4266	Wooster	200	3713
Timken Co, The	Jeff Hoer	330-264-1122	Wooster	200	3312
Metals USA/Wooste	Don Gingery	330-264-8416	Wooster	150	3312
Seaman Corp, Indu	Dave Slater	330-262-1111	Wooster	150	2299
Wooster Daily Reco	Rhonda Geer	330-264-1125	Wooster	150	2711
CNC Metal Products	Kim Vantol	330-264-6640	Wooster	140	2542
International Paper	James Gracey	330-264-1322	Wooster	130	2653
Metromedia Techno	Ralph A. Gillota	330-264-2501	Wooster	119	3993
FJ Designs	Darcy Pajak	330-264-1377	Wooster	115	2396
Buckeye Container	T. J. Shea	330-264-6336	Wooster	114	2653
Rayco Mfg Inc	J.R. Bowling	330-264-8699	Wooster	110	3524
Bauer Corp	Ron Smith	330-262-3070	Wooster	100	3499

- 3) Save the exported data in your “My Documents” folder. Give it an easy to remember name. For this example we will use “**epin-export.xls**”



- 4) Close PinPointer and open the exported file in Microsoft Excel.

5) Your screen should look something like this:

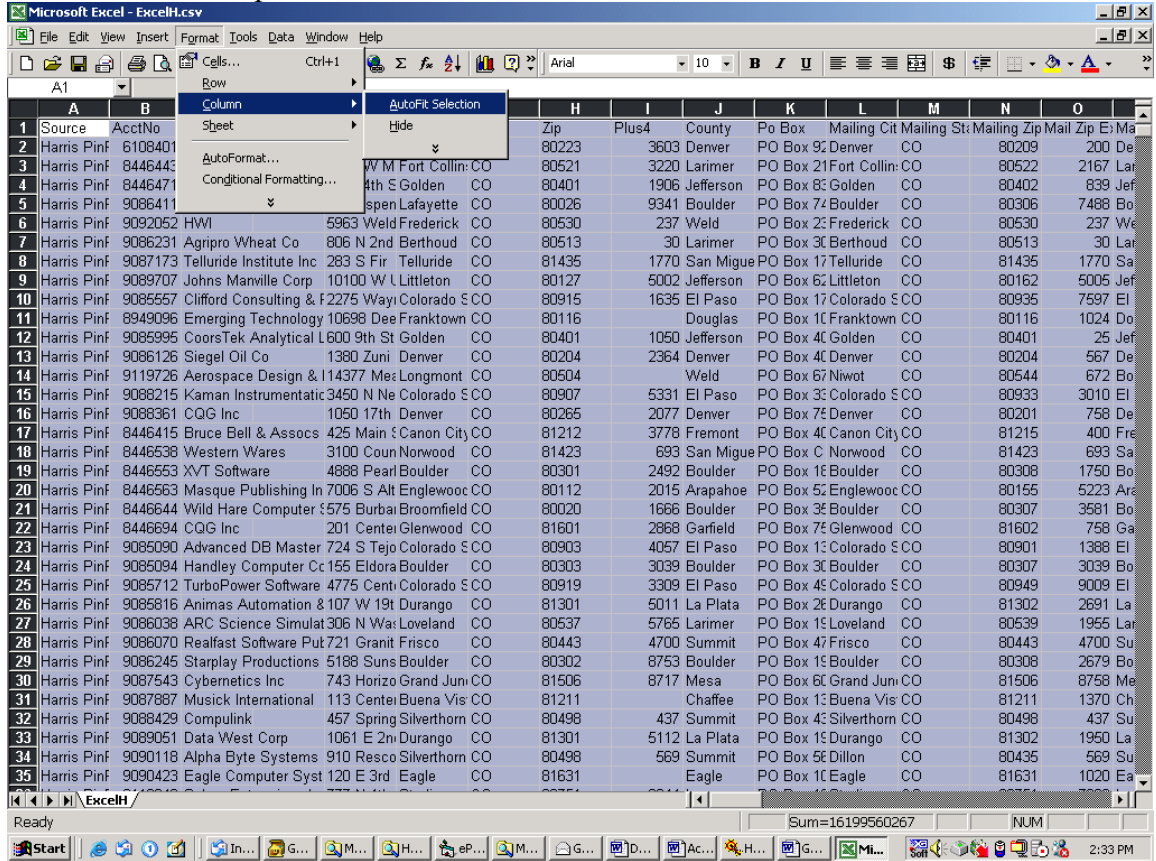


6) Select the entire spreadsheet by clicking the gray box above “1” and to the left of “A”.

7) Your screen should now look similar to this:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	Source	AcctNo	Company	Division	Address	City	State	Zip	Plus4	County	Po Box	Mailing Cit	Mailing Str	Mailing Zip	Mail Zip	E: Mail
2	Harris Pinf	6108401	Aggregate Industries		11705 S Ac	Denver	CO	80223		3603 Denver	PO Box 9	Denver	CO	80209	200 De	
3	Harris Pinf	8446443	Hawkeye Information		2115 W M	Fort Collin	CO	80521		3220 Larimer	PO Box 21	Fort Collin	CO	80522	2167 Lar	
4	Harris Pinf	8446471	Interpex Ltd		715 14th S	Golden	CO	80401		1906 Jefferson	PO Box 8	Golden	CO	80402	839 Jef	
5	Harris Pinf	9086411	Coherent Technologie		655 Aspen	Lafayette	CO	80026		9341 Boulder	PO Box 74	Boulder	CO	80306	7488 Bo	
6	Harris Pinf	9092052	HWI		5963 Weld	Frederick	CO	80530		237 Weld	PO Box 2	Frederick	CO	80530	237 We	
7	Harris Pinf	9086231	Agripro Wheat Co		806 N 2nd	Berthoud	CO	80513		30 Larimer	PO Box 3	Berthoud	CO	80513	30 Lar	
8	Harris Pinf	9087173	Telluride Institute Inc		283 S Fir	Telluride	CO	81435		1770 San Migue	PO Box 17	Telluride	CO	81435	1770 Sa	
9	Harris Pinf	9089707	Johns Manville Corp		10100 W L	Littleton	CO	80127		5002 Jefferson	PO Box 6	Littleton	CO	80162	5005 Jef	
10	Harris Pinf	9085557	Clifford Consulting &		F2275 Way	Colorado	CO	80915		1636 El Paso	PO Box 17	Colorado	CO	80935	7597 El	
11	Harris Pinf	8949096	Emerging Technology		10698 Dee	Franktown	CO	80116		Douglas	PO Box 1	Franktown	CO	80116	1024 Do	
12	Harris Pinf	9085995	CoorsTek Analytical		L600 9th St	Golden	CO	80401		1050 Jefferson	PO Box 4	Golden	CO	80401	25 Je	
13	Harris Pinf	9086126	Siegel Oil Co		1380 Zuni	Denver	CO	80204		2364 Denver	PO Box 4	Denver	CO	80204	567 De	
14	Harris Pinf	9119726	Aerospace Design &		M114377 Me	Longmont	CO	80504		Weld	PO Box 67	Niwot	CO	80544	672 Bo	
15	Harris Pinf	9088215	Kaman Instrumentatic		3450 N Ne	Colorado	CO	80907		5331 El Paso	PO Box 3	Colorado	CO	80933	3010 El	
16	Harris Pinf	9088361	CQG Inc		1050 17th	Denver	CO	80265		2077 Denver	PO Box 7	Denver	CO	80201	758 De	
17	Harris Pinf	8446415	Bruce Bell & Assocs		425 Main	Canon City	CO	81212		3778 Fremont	PO Box 4	Canon City	CO	81215	400 Fre	
18	Harris Pinf	8446538	Western Wares		3100 Coun	Norwood	CO	81423		693 San Migue	PO Box C	Norwood	CO	81423	693 Sa	
19	Harris Pinf	8446553	XVT Software		4888 Pearl	Boulder	CO	80301		2492 Boulder	PO Box 1	Boulder	CO	80308	1750 Bo	
20	Harris Pinf	8446563	Masque Publishing In		7006 S Alt	Englewooc	CO	80112		2015 Arapahoe	PO Box 5	Englewooc	CO	80155	5223 Ara	
21	Harris Pinf	8446644	Wild Hare Computer		S575 Burbai	Broomfield	CO	80020		1666 Boulder	PO Box 3	Boulder	CO	80307	3581 Bo	
22	Harris Pinf	8446694	CQG Inc		201 Cente	Glenwood	CO	81601		2668 Garfield	PO Box 7	Glenwood	CO	81602	758 Ga	
23	Harris Pinf	9085090	Advanced DB Master		724 S Tejo	Colorado	CO	80903		4057 El Paso	PO Box 1	Colorado	CO	80901	1388 El	
24	Harris Pinf	9085094	Handley Computer Cc		155 Eldora	Boulder	CO	80303		3039 Boulder	PO Box 3	Boulder	CO	80307	3039 Bo	
25	Harris Pinf	9085712	TurboPower Software		4775 Cent	Colorado	CO	80919		3309 El Paso	PO Box 4	Colorado	CO	80949	9009 El	
26	Harris Pinf	9085816	Animas Automation &		107 W 19t	Durango	CO	81301		5011 La Plata	PO Box 2	Durango	CO	81302	2691 La	
27	Harris Pinf	9086038	ARC Science Simulat		306 N Wat	Loveland	CO	80537		5765 Larimer	PO Box 1	Loveland	CO	80539	1955 Lar	
28	Harris Pinf	9086070	Realfast Software Put		721 Granit	Frisco	CO	80443		4700 Summit	PO Box 47	Frisco	CO	80443	4700 Su	
29	Harris Pinf	9086245	Starplay Productions		5188 Suns	Boulder	CO	80302		8753 Boulder	PO Box 1	Boulder	CO	80308	2679 Bo	
30	Harris Pinf	9087543	Cybernetics Inc		743 Horizo	Grand Jun	CO	81506		8717 Mesa	PO Box 6	Grand Jun	CO	81506	8758 Me	
31	Harris Pinf	9087887	Musick International		113 Cente	Buena Vis	CO	81211		Chaffee	PO Box 1	Buena Vis	CO	81211	1370 Ch	
32	Harris Pinf	9088429	Compulink		457 Spring	Silverthom	CO	80498		437 Summit	PO Box 4	Silverthom	CO	80498	437 Su	
33	Harris Pinf	9089051	Data West Corp		1061 E 2n	Durango	CO	81301		5112 La Plata	PO Box 1	Durango	CO	81302	1950 La	
34	Harris Pinf	9090118	Alpha Byte Systems		910 Resco	Silverthom	CO	80498		569 Summit	PO Box 5	Dillon	CO	80435	569 Su	
35	Harris Pinf	9090423	Eagle Computer Syst		120 E 3rd	Eagle	CO	81631		Eagle	PO Box 1	Eagle	CO	81631	1020 Ea	

- 8) From Excel's menu, select **Format -> Column -> Autofit Selection**. As shown in this example:



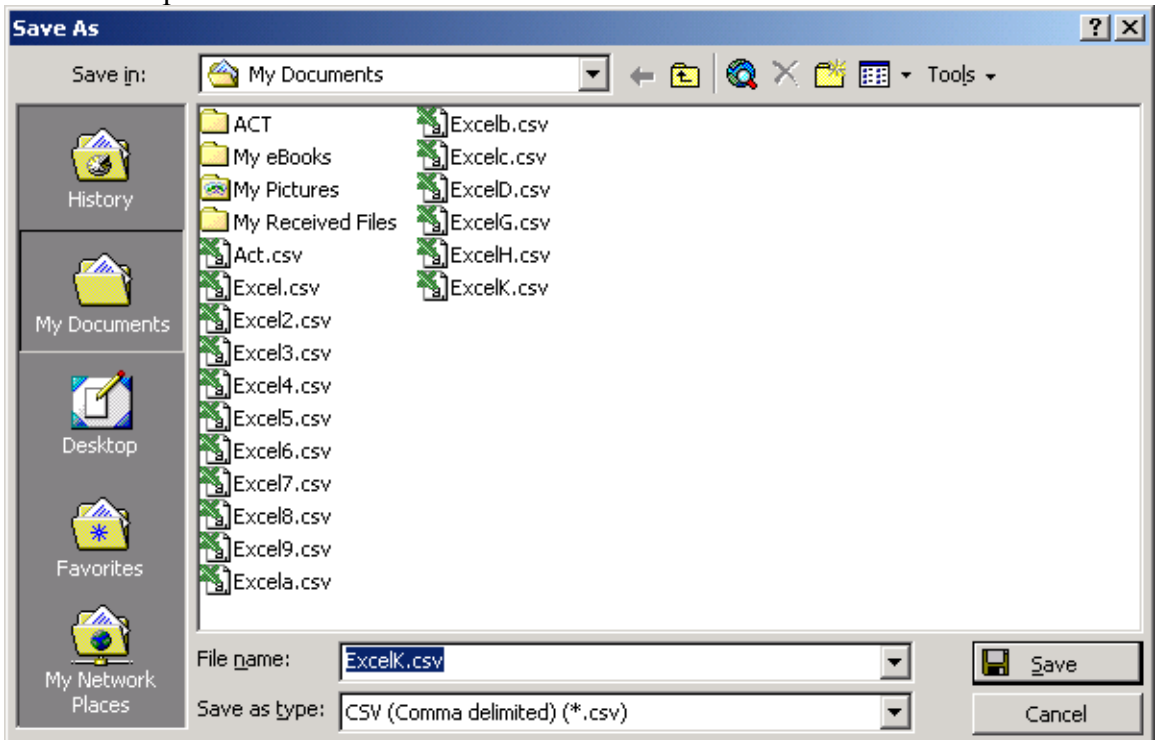
- 9) Click on any cell in the worksheet to turn off the selection. Your screen should look similar to this:

The screenshot shows a Microsoft Excel window titled 'ExcelK.csv'. The worksheet contains a list of companies with columns for Source, AcctNo, Company, Division Name, Address1, City, State, and Zip. The 'Source' cell in row 1 is selected.

Source	AcctNo	Company	Division Name	Address1	City	State	Zip
Harris PinPointer	6108401	Aggregate Industries Inc		1705 S Acoma St	Denver	CO	802
Harris PinPointer	8446443	Hawkeye Information Systems		2115 W Mulberry St	Fort Collins	CO	805
Harris PinPointer	8446471	Interpex Ltd		715 14th St	Golden	CO	804
Harris PinPointer	9086411	Coherent Technologies Inc		655 Aspen Ridge Dr	Lafayette	CO	800
Harris PinPointer	9092052	HWI		5963 Weld County Road 16	Frederick	CO	805
Harris PinPointer	9086231	Agripro Wheat Co		806 N 2nd St	Berthoud	CO	805
Harris PinPointer	9087173	Telluride Institute Inc		283 S Fir	Telluride	CO	814
Harris PinPointer	9089707	Johns Marville Corp		10100 W Ute Ave	Littleton	CO	801
Harris PinPointer	9085557	Clifford Consulting & Research		2275 Waynoka Rd # J	Colorado Springs	CO	809
Harris PinPointer	8949096	Emerging Technology Solutions		10698 Deerfield Rd	Franktown	CO	801
Harris PinPointer	9085995	CoorsTek Analytical Labs		600 9th St	Golden	CO	804
Harris PinPointer	9086126	Siegel Oil Co		1380 Zuni St	Denver	CO	802
Harris PinPointer	9119726	Aerospace Design & Development		14377 Mead St	Longmont	CO	805
Harris PinPointer	9086215	Kaman Instrumentation Opers		3450 N Nevada Ave	Colorado Springs	CO	809
Harris PinPointer	9086361	COG Inc		1050 17th St # 2000	Denver	CO	802
Harris PinPointer	8446415	Bruce Bell & Assocs		425 Main St # 10	Canon City	CO	812
Harris PinPointer	8446538	Western Wares		3100 County Road 43ZS	Norwood	CO	814
Harris PinPointer	8446553	XVT Software		4888 Pearl East Cir # 110	Boulder	CO	803
Harris PinPointer	8446563	Masque Publishing Inc		7006 S Alton Way # A	Englewood	CO	801
Harris PinPointer	8446644	Wild Hare Computer Systems Inc		575 Burbank St # E	Broomfield	CO	800
Harris PinPointer	8446694	COG Inc		201 Centennial Dr	Glenwood Springs	CO	816
Harris PinPointer	9085090	Advanced DB Master		724 S Tejon St	Colorado Springs	CO	809
Harris PinPointer	9085094	Handley Computer Corp		155 Eldorado Springs Dr	Boulder	CO	803
Harris PinPointer	9085712	TurboPower Software Co		4775 Centennial Blvd # 114	Colorado Springs	CO	809
Harris PinPointer	9085816	Animas Automation & Controls		107 W 19th St	Durango	CO	813
Harris PinPointer	9086038	ARC Science Simulations		306 N Washington Ave	Loveland	CO	805
Harris PinPointer	9086070	Realfast Software Publishing		721 Granite St # B	Frisco	CO	804
Harris PinPointer	9086245	Starplay Productions Inc		5188 Sunshine Canyon Dr	Boulder	CO	803
Harris PinPointer	9087543	Cybernetics Inc		743 Horizon Ct # 322	Grand Junction	CO	815
Harris PinPointer	9087887	Musick International		113 Centennial Plaza	Buena Vista	CO	812
Harris PinPointer	9088429	Compulink		457 Spring Beauty Dr	Silverthorne	CO	804
Harris PinPointer	9089051	Data West Corp		1061 E 2nd Ave	Durango	CO	813
Harris PinPointer	9090118	Alpha Byte Systems Inc		910 Rescola Ave	Silverthorne	CO	804
Harris PinPointer	9090423	Eagle Computer Systems		120 E 3rd St	Eagle	CO	816

- 10) From the Excel menu, select **File -> Save As**.

11) You will be presented with a screen like this:

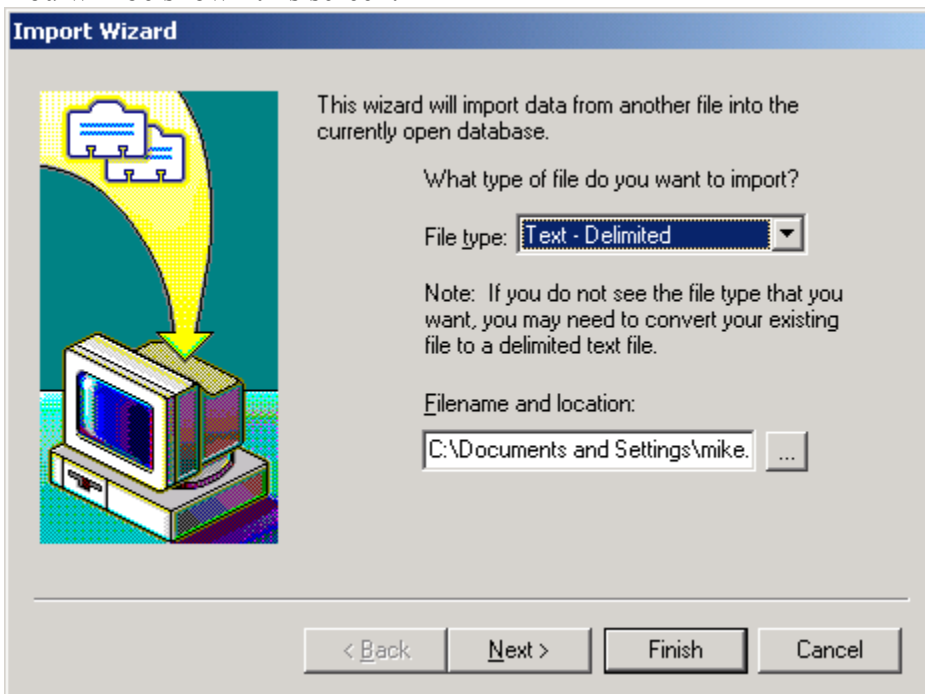


12) Save the file as a CSV type file.

13) Launch Act!

14) From the Act! menu select **File -> Data Exchange -> Import**.

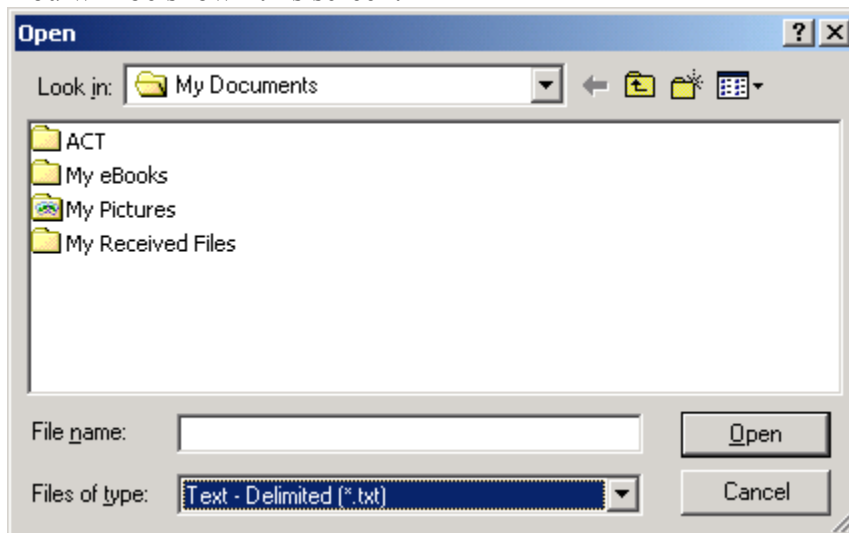
15) You will be shown this screen:



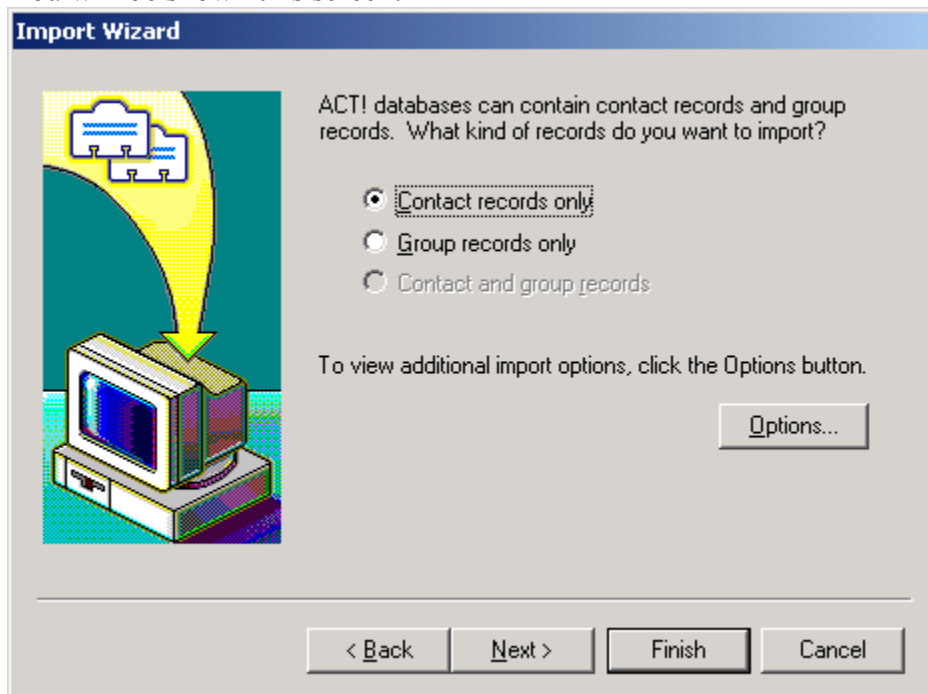
16) Select **Text – Delimited** as the file type.

17) Click on the button to the right of the text box listing the file name.

18) You will be shown this screen:

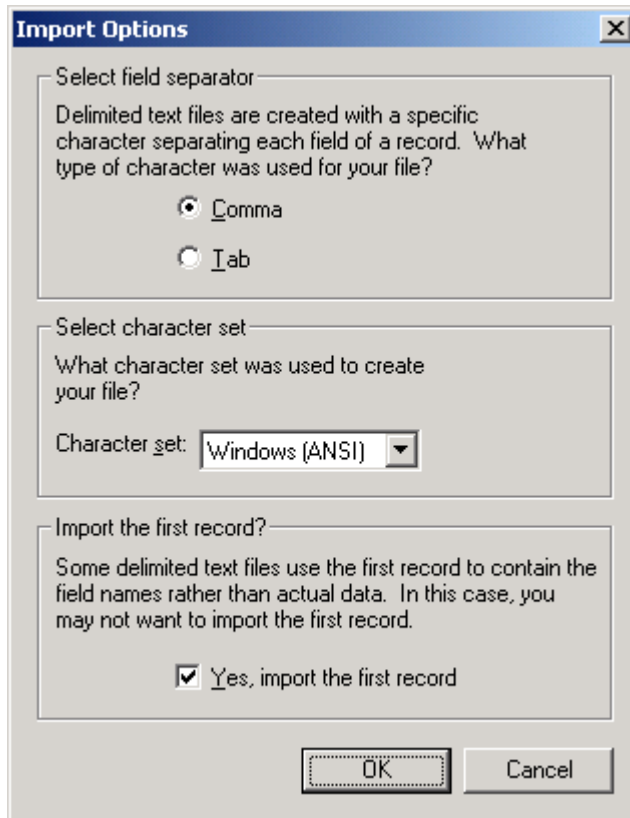


- 19) Select **Text – Delimited (\*.csv)** as the type of file. The two available options are very similar. Make sure you select the one that ends in “(\*.csv)”.
- 20) Select **The CSV File You Saved in Excel** by clicking on it in the list of files.
- 21) Click **Open**.
- 22) Click **Next >**.
- 23) You will be shown this screen:



- 24) Select the **Contact records only** option.
- 25) Click **Options....**

26) You will be shown this screen:

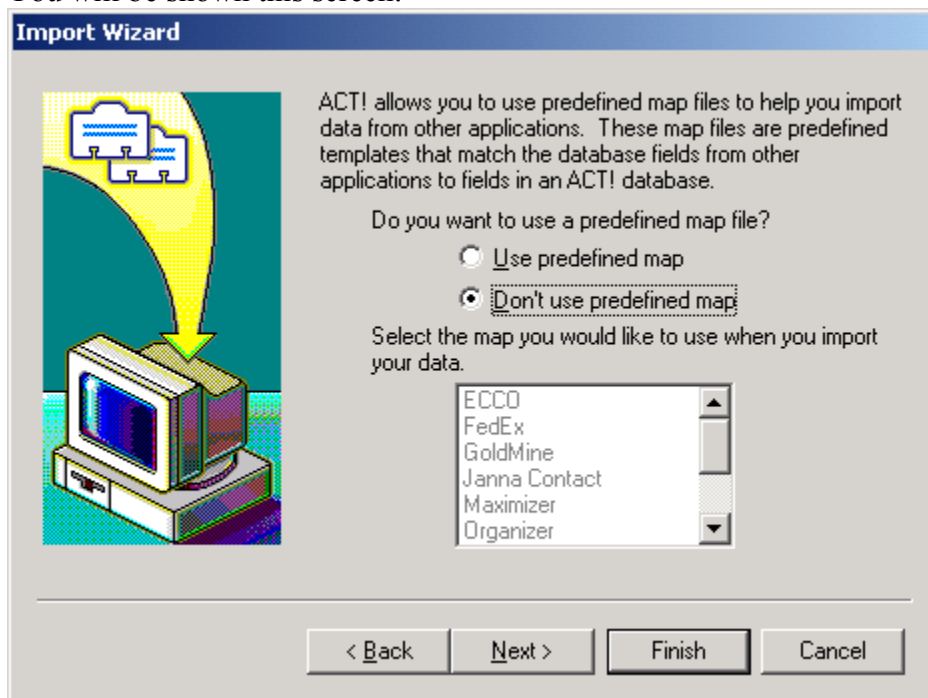


27) Remove the check next to **Yes, import the first record**.

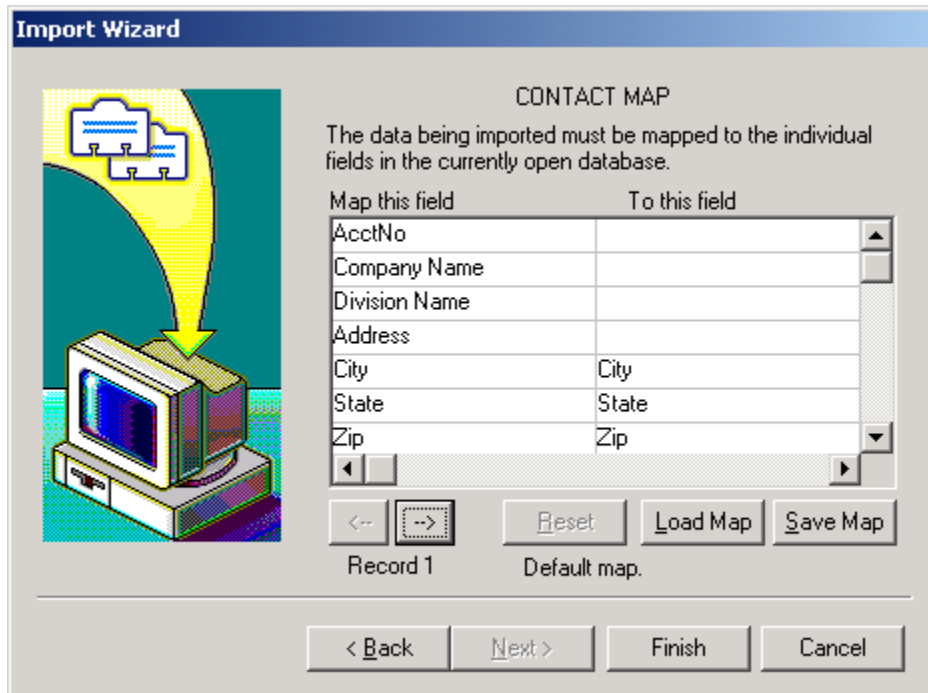
28) Click **OK**.

29) Click **Next >**.

30) You will be shown this screen:



- 31) Make sure the **Don't use predefined map** option is selected.
- 32) Click **Next >**.
- 33) You will be shown this screen:



- 34) The fields have been mapped as shown below. If you wish to change the field mapping, you may do so at this time.

<u>Act Field</u>	<u>Contents</u>
Company	Company name
Address 1	Physical street address
City	Physical city
State	Physical state
Zip	Physical zip
Home Address	Mailing address
Home City	Mailing city
Home State	Mailing state
Home Zip	Mailing zip
Phone	Phone number
Alt Phone	Toll free phone number
User 1	“Technology PinPointer”
User 2	# of employees
User 3	Plant size in sq ft
User 4	Employment change over the last 3 years
User 5	Product description
User 6	Annual sales
User 7	Primary SIC code
Web Site	Web site address
Ticker Symbol	Stock ticker symbol
Contact	Full name of first contact

Title  
2<sup>nd</sup> Contact  
2<sup>nd</sup> Title  
3<sup>rd</sup> Contact  
3<sup>rd</sup> Title

Title of first contact  
Full name of second contact  
Title of second contact  
Full name of third contact  
Title of third contact

35) Click **Finish**.

36) The PinPointer® data will now be imported!