

Affiliate Program
CSV Export
User Guide

SmartOffice®



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Overview

This guide outlines the steps necessary to export contact data to and from commonly used Customer Relationship Management (CRM) programs for import into SmartOffice®. This guide is comprehensive; however, it may not cover every possible situation. If you find that you require more detailed or specific instructions, please use the links provided to contact the manufacturer of the corresponding software.

What is a CSV file?

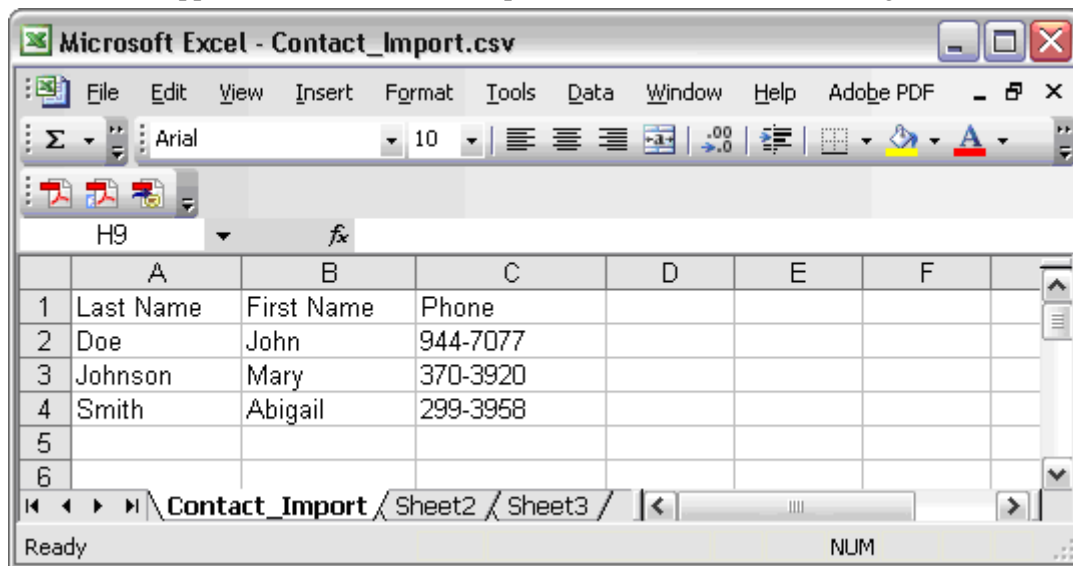
To import data into SmartOffice, the data must be in Comma Separated Value (.csv) format.

A CSV file contains the values in a table as a series of ASCII text lines organized so that each column value is separated by a comma from the next column's value and each row starts a new line.

For example:

```
Doe, John, 944-7077  
Johnson, Mary, 370-3920  
Smith, Abigail, 299-3958
```

A number of applications can be used to open and work with CSV files (e.g., Microsoft® Excel®).



Most importantly, the data must be saved to a file with a .csv extension. To learn how to use Microsoft® Excel® to save data in a CSV file format, consult the MS Excel Help system.

Importing to SmartOffice

After following the steps for the applicable affiliate program to export your contact information into .csv format, follow the links below for instructions on importing your data into SmartOffice.

SmartOffice Data Import Fast Class

<http://www.ezdata.com/news/eznews/SOFCv53DataImport/SOFCv53DataImportFlash/SOFCv53DataImport.html>

SmartOffice Data Import User Guide

http://www.ez-data.com/support/SO50_UserGuides/SmartOffice_v51_-_Data_Import_User_Guide.pdf

SmartOffice - Available Fields for Import

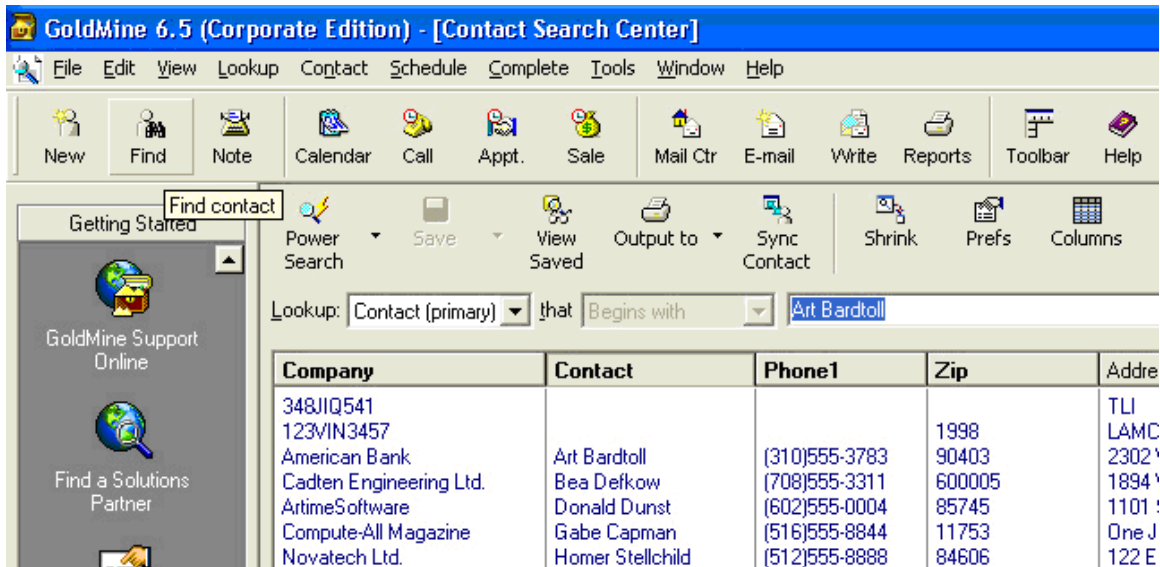
Important: When importing data into SmartOffice, all data must be separated into its own column. If, for example, the Contact's Name is in one field, it must be separated into a First Name Column and a Last Name Column.

The following is a list of fields in SmartOffice that data can be imported into:

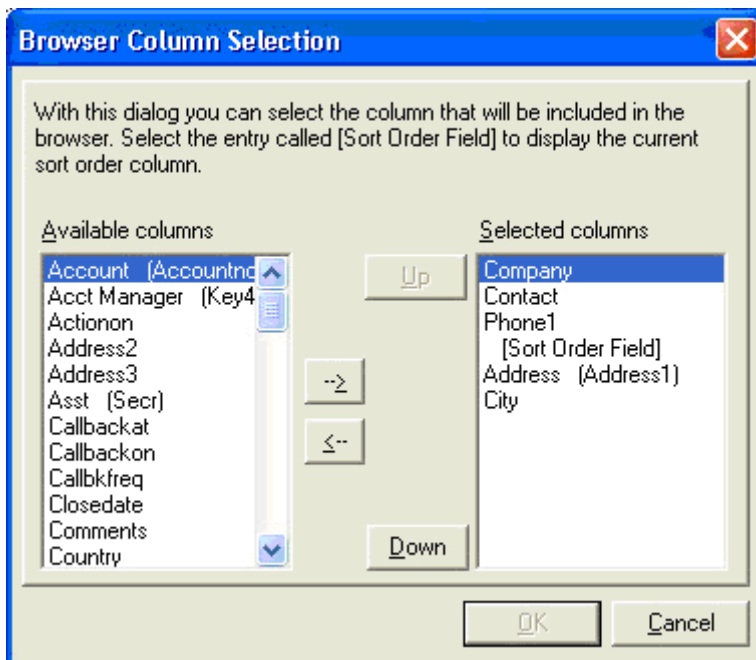
- # of Children
- Age
- Alphakey
- AlphaNum1
- AlphaNum2
- Birth Place
- Business Fax
- Business Phone
- Business City
- Business Country
- Business Moved in Date
- Business Remark
- Business State
- Business Street
- Business Street2
- Business Street3
- Business Street4
- Business Street5
- Business ZIP Code
- Date of Birth DOB
- E-Mail
- Employer
- First Name
- Gender
- Greeting
- Job Title
- Last Name
- Marital
- Middle Name
- Mobile (Cell Phone)
- Nationality
- Net Worth
- Occupation
- Pager
- PIC
- PICQ
- Primary Language
- Remarks
- Residence Fax
- Residence Phone
- Residence City
- Residence Country
- Residence Moved in Date
- Residence Remark
- Residence State
- Residence Street
- Residence Street2
- Residence Street3
- Residence Street4
- Residence Street5
- Residence ZIP Code
- Review Date
- Salary
- SmartPad Notes
- Spouse Notes
- Spouse Age
- Spouse Date of Birth DOB
- Spouse Employer
- Spouse Greeting
- Spouse Info
- Spouse Job Title
- Spouse Occupation
- Spouse Preferred Phone
- Spouse Salary
- Social Security #
- Sub-Source
- Sub-Type
- Suffix
- Title
- Tobacco
- Total Income
- Web Site
- ZIP Code

Exporting from GoldMine®

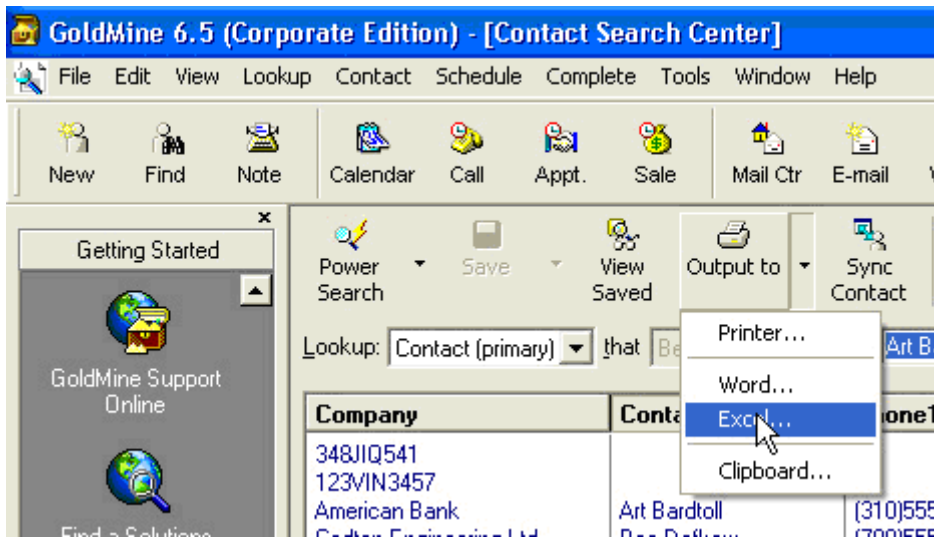
1. Open the **Contact Search Center** to display the Contacts for export.



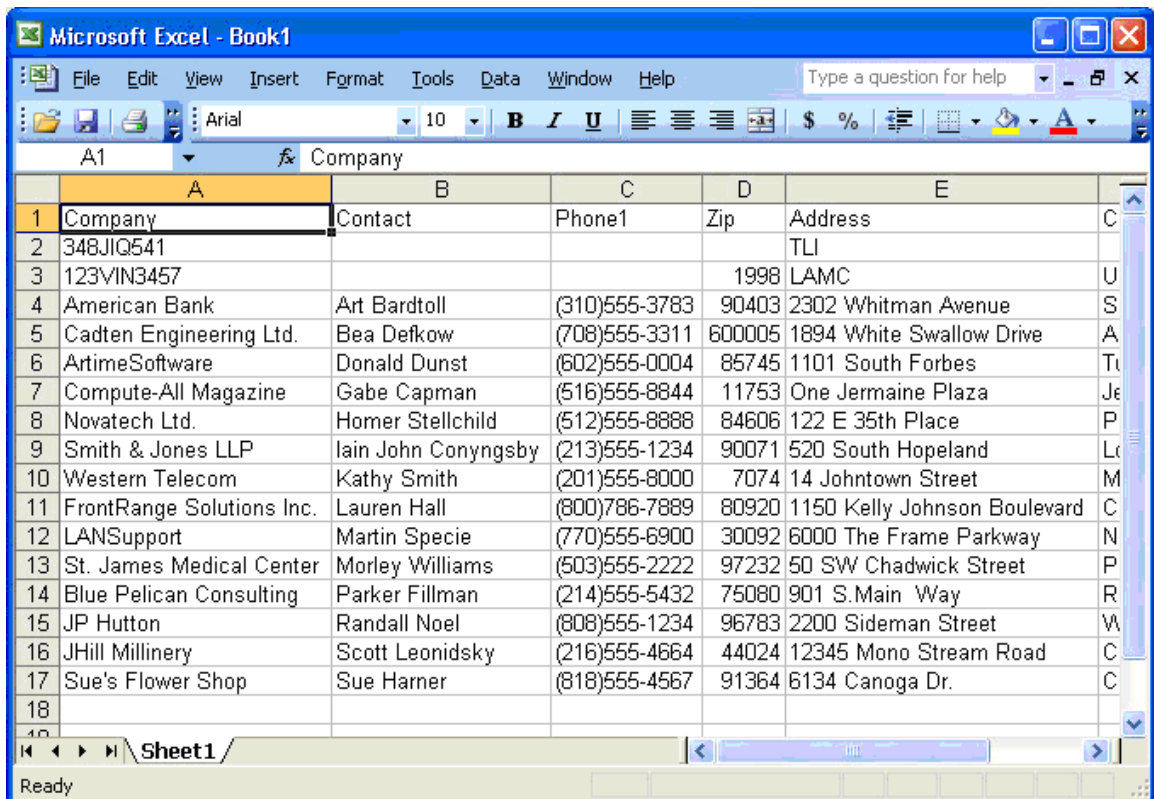
2. After displaying the Contacts for export, click the **Columns** button to open the Browser Column Selection dialog box.



- Specify the appropriate columns for export and then click the **OK** button to return to the Contact Search Center.



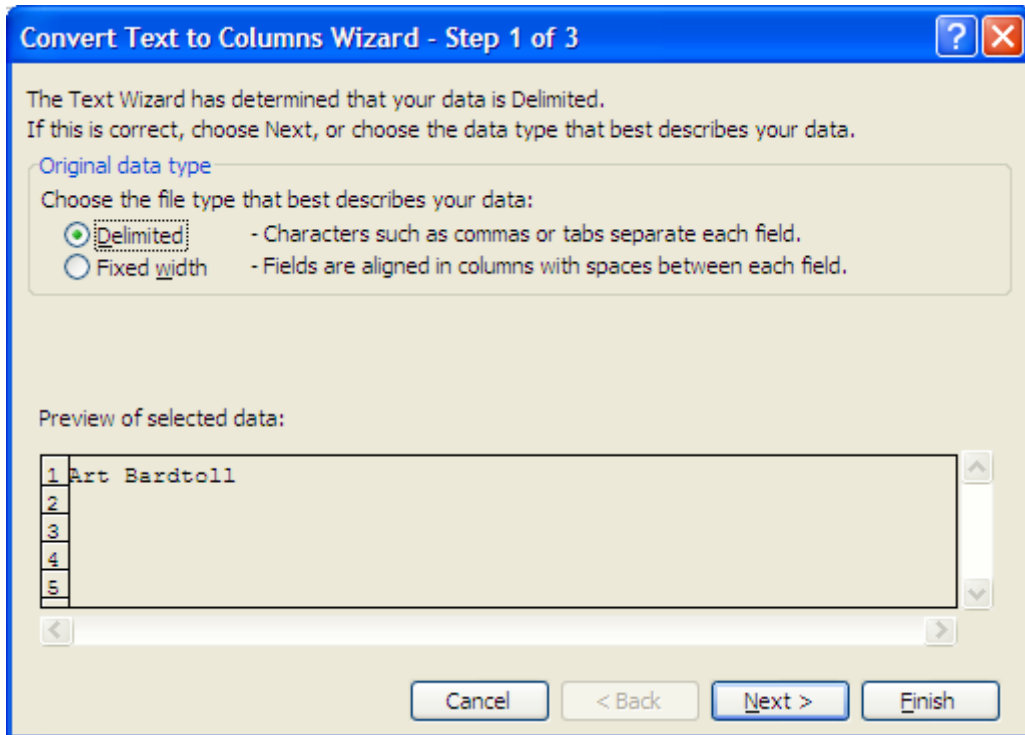
- Click the **Output To** button and then select the **Excel** option from the expanded menu to open Microsoft Excel and display the exported information.



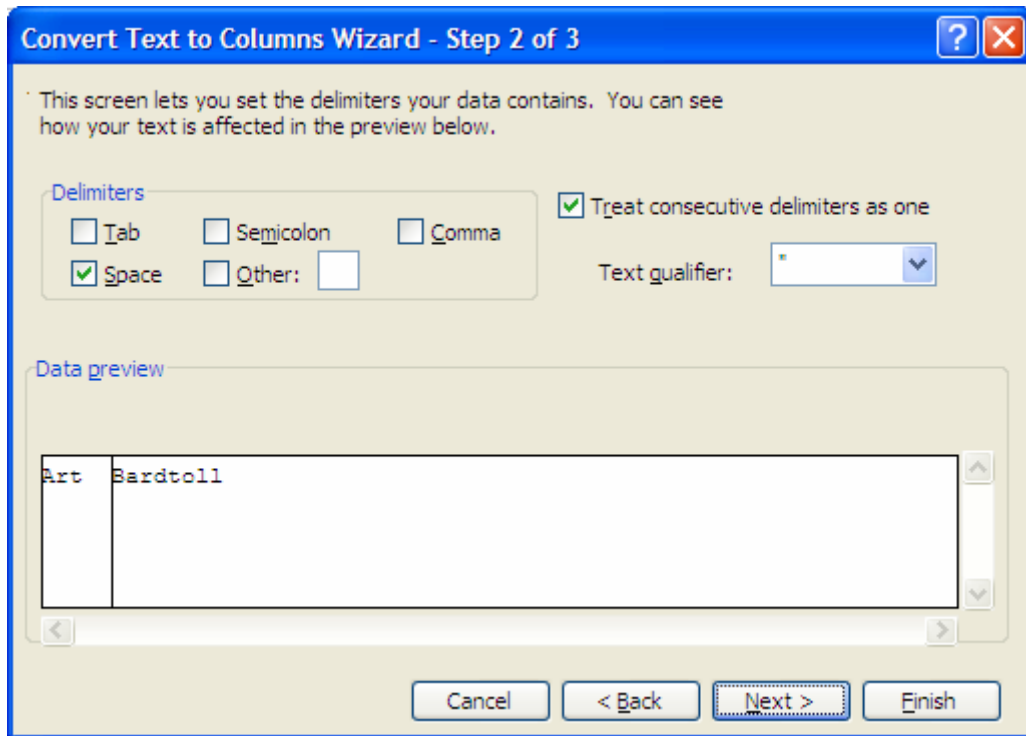
Separating Names into Individual Columns

Note that when contact data is exported from GoldMine, the Contact's First and Last Name display in the same column. Before importing data into SmartOffice, you will need to separate the first and last names into separate columns.

1. Position your cursor in the column to the right of the Contact column. In the example above, this would be column C.
2. Select **Column** from the expanded **Insert** menu.
3. Click the Contact column heading to select the entire column. In the example above, this would be column B.
4. Click **Data** then select **Text to Columns** to display the Convert Text to Columns Wizard - Step 1 of 3 dialog box.

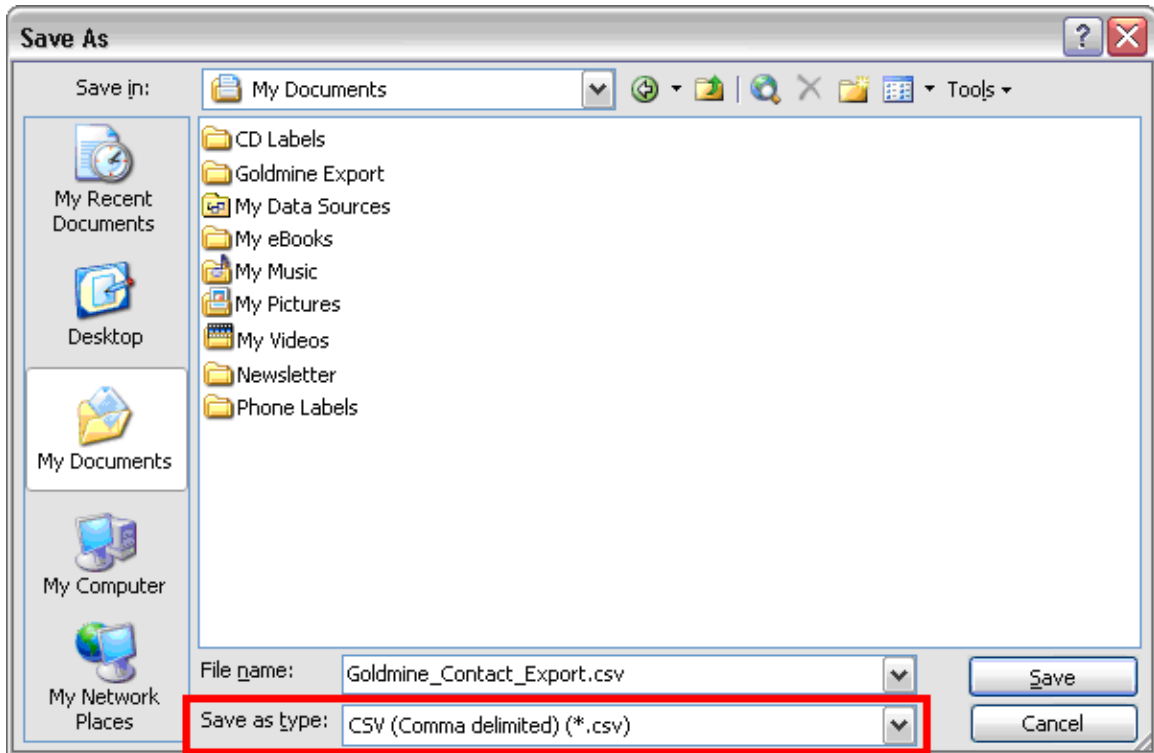


5. Select the **Delimited** option and then click the **Next** button to display Step 2 of 3 of the Wizard.



6. In the Delimiters section, select the **Space** option and then click the **Next** button.
7. Click the **Finish** button on the last screen of the Wizard. The first and last names now display in separate columns. For help on this feature, please refer to the Microsoft Excel Help system.

8. In MS Excel, select **Save** from the expanded **File** menu to open the Save As dialog box.



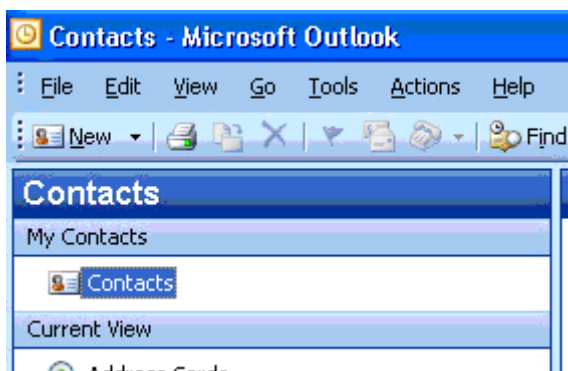
9. Enter a **File name**, specify a **Save In** location, select **CSV (Comma delimited) (*.csv)** from the Save as Type drop-down list and then click the **OK** button to save the exported information.

For more information on export features in GoldMine, contact GoldMine Technical Support.

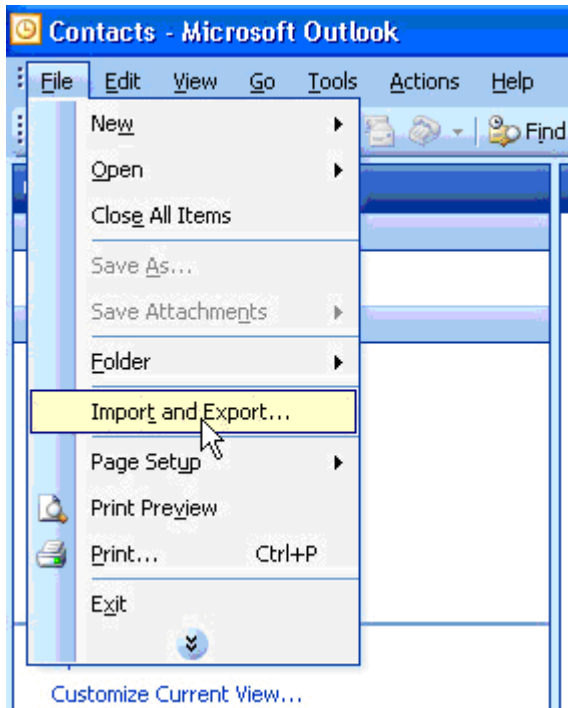
GoldMine Support: <http://www.frontrange.com/Support/Category.aspx?id=194&ccid=62>

Exporting from Microsoft® Outlook®

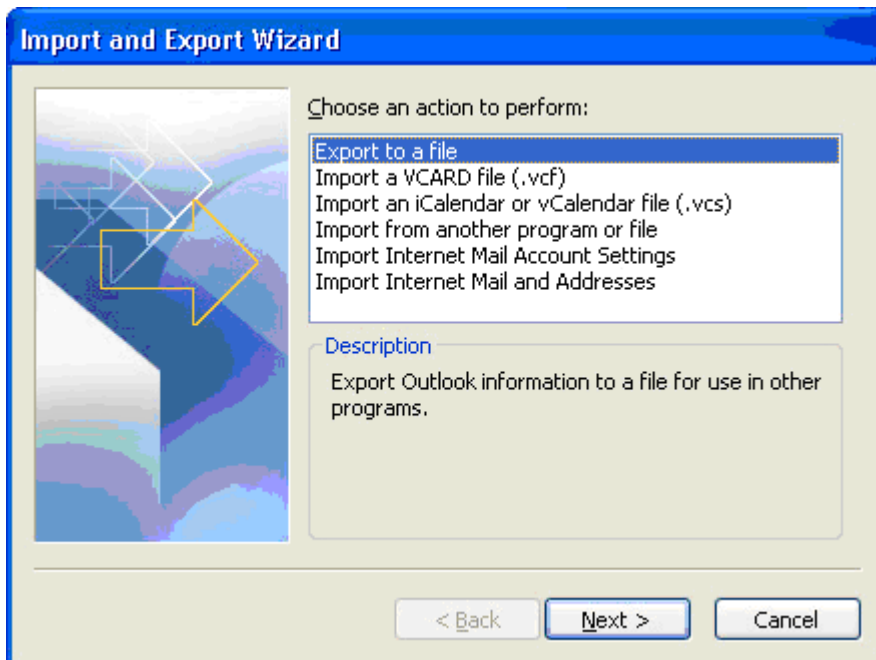
1. From MS Outlook, select the **Contact** folder containing the data to be exported.



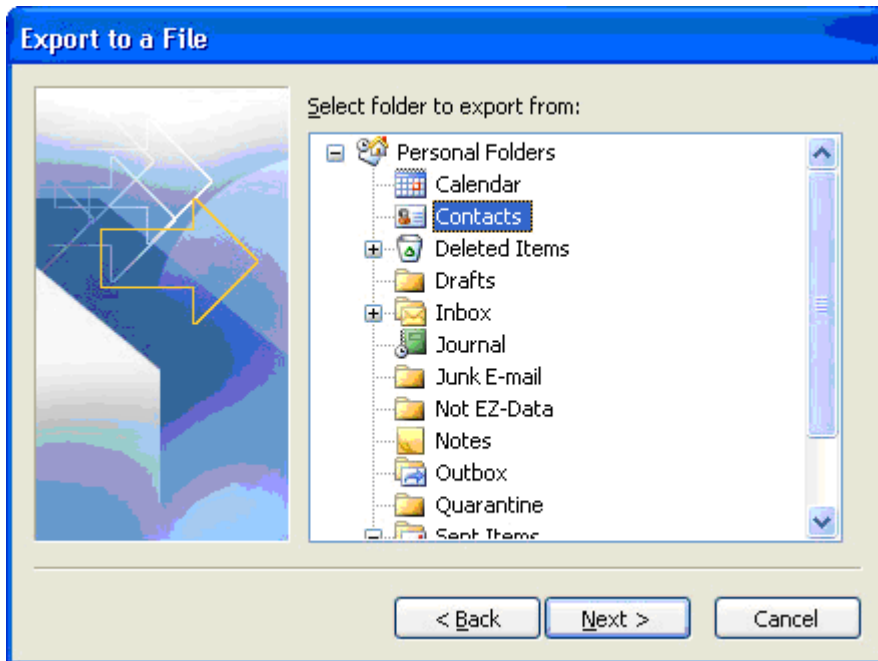
2. Select **Import and Export** from the expanded **File** menu.



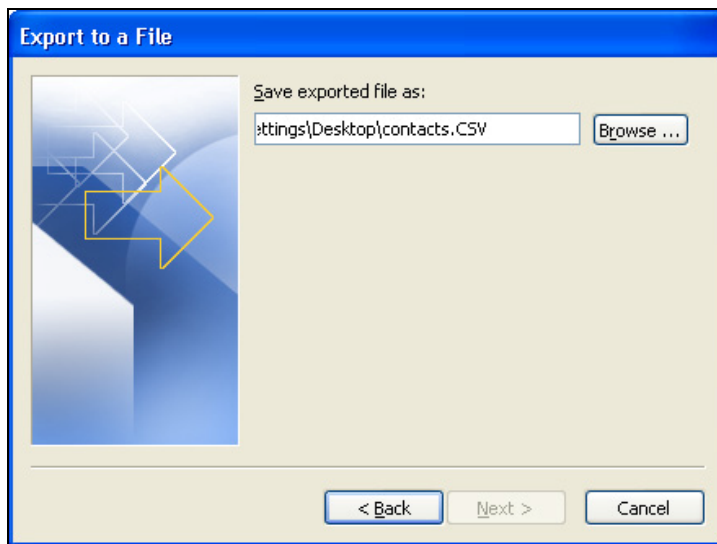
3. From the Import and Export Wizard dialog box, select the **Export to a file** option and then click the **Next** button.



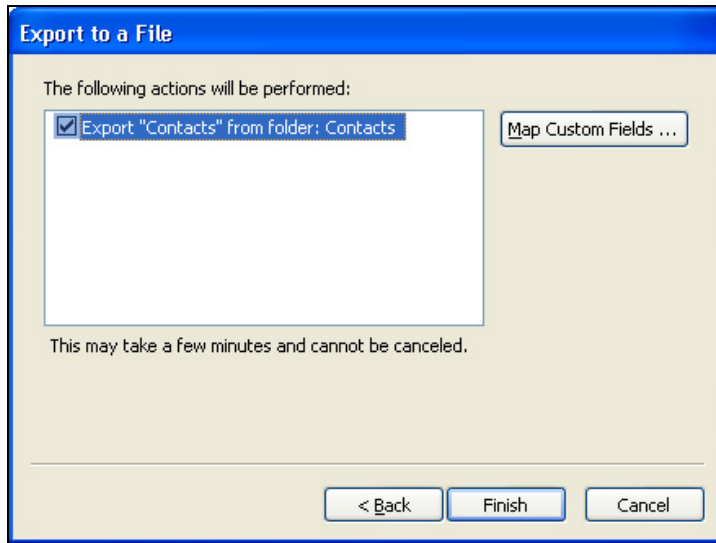
4. Select the MS Outlook Contact folder containing the data to be exported and then click the **Next** button.



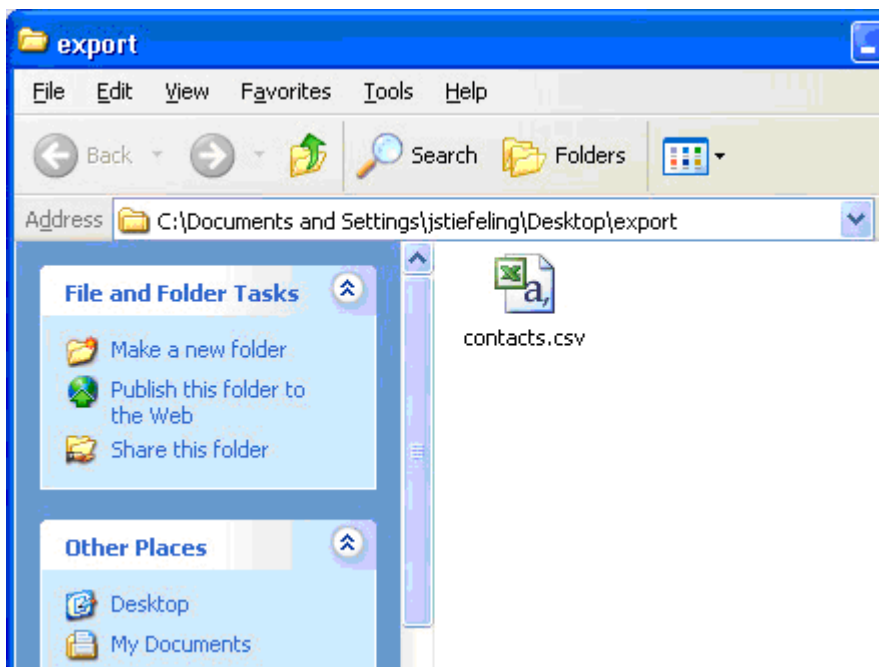
5. Name the exported data file and then click the **Browse** button to select a location to save it. The default save location is the Desktop. Be certain to retain the file's .csv extension and then click the **Next** button.



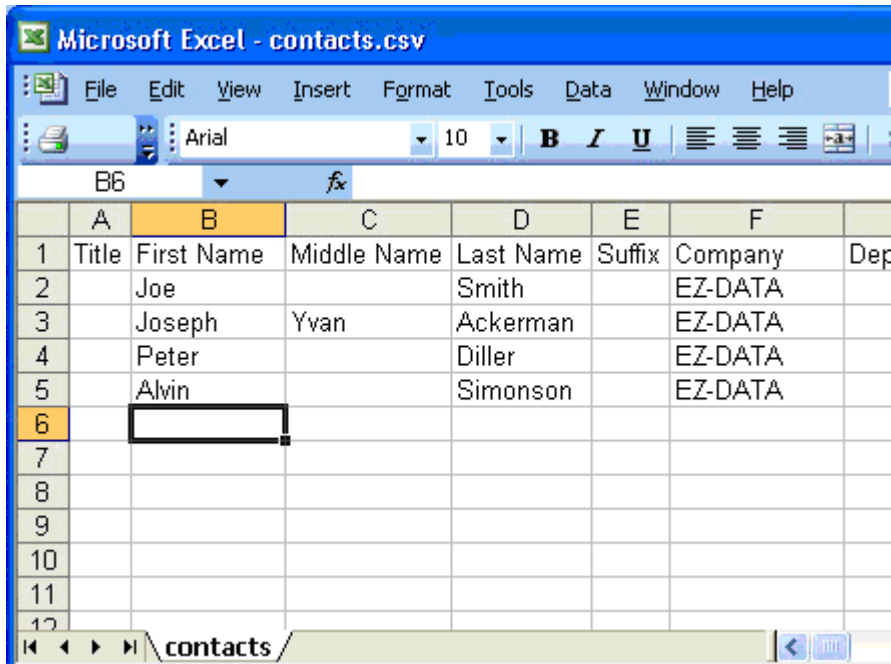
6. Click the **Finish** button to export the information.



7. Locate and open the saved file.



- In MS Excel, remove the columns that do not contain data relevant to SmartOffice.



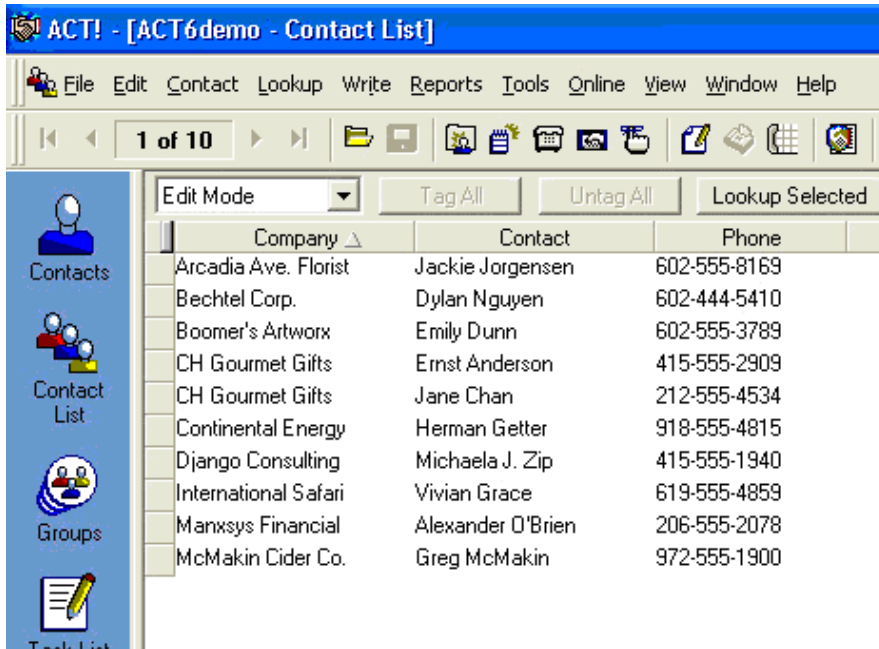
- Select **Save** from the expanded **File** menu.
- Enter a **File name**, specify a **Save In** location, select **CSV (Comma delimited) (*.csv)** from the Save as Type drop-down list and then click the **OK** button to save the exported information.

If you have more questions about exporting from MS Outlook, contact Microsoft Technical Support.

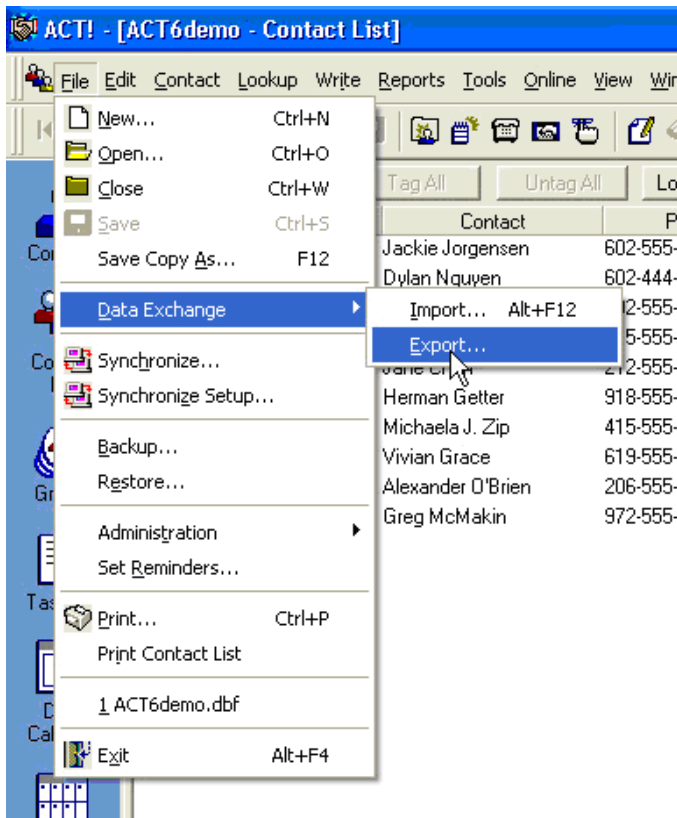
Microsoft Outlook Support: <http://support.microsoft.com/oas/default.aspx?LN=en-us&gprid=2520&x=10&y=17>

Exporting from ACT!™

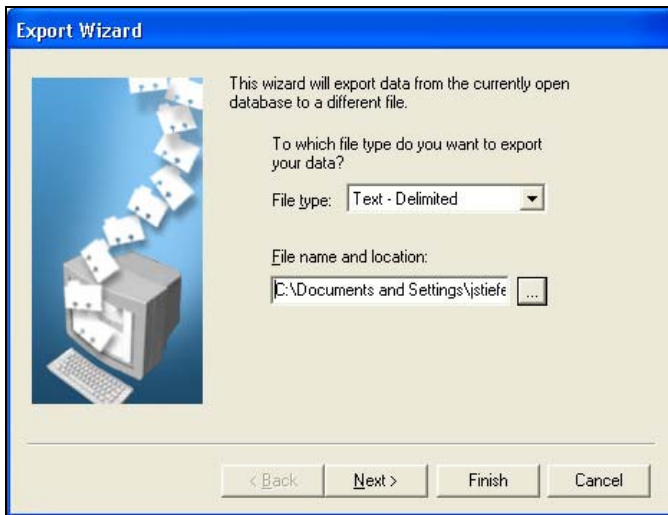
1. In ACT!, adjust the Contact List so that it displays all of the contact records for export.
2. Add or Subtract columns so that the Contact Information displayed is what is for export.



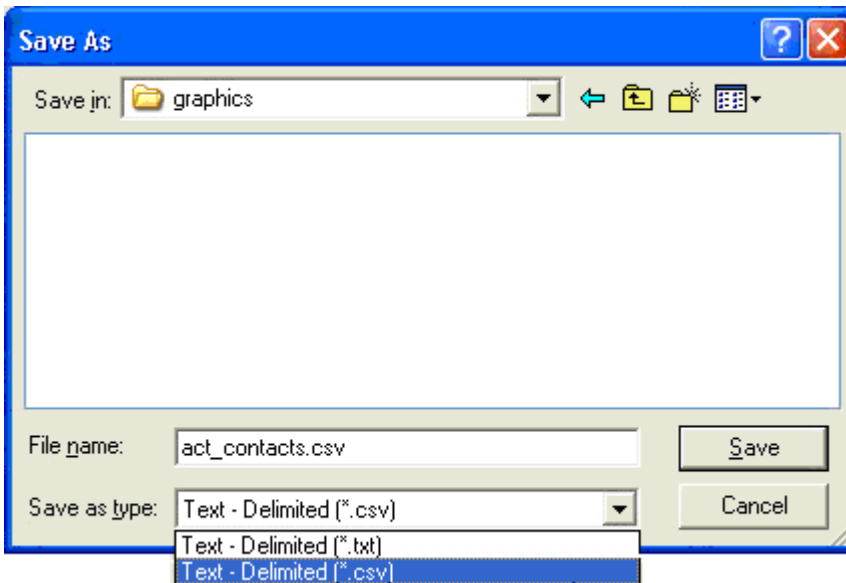
3. Click the **File** menu item and then select **Export** from the expanded **Data Exchange** menu.



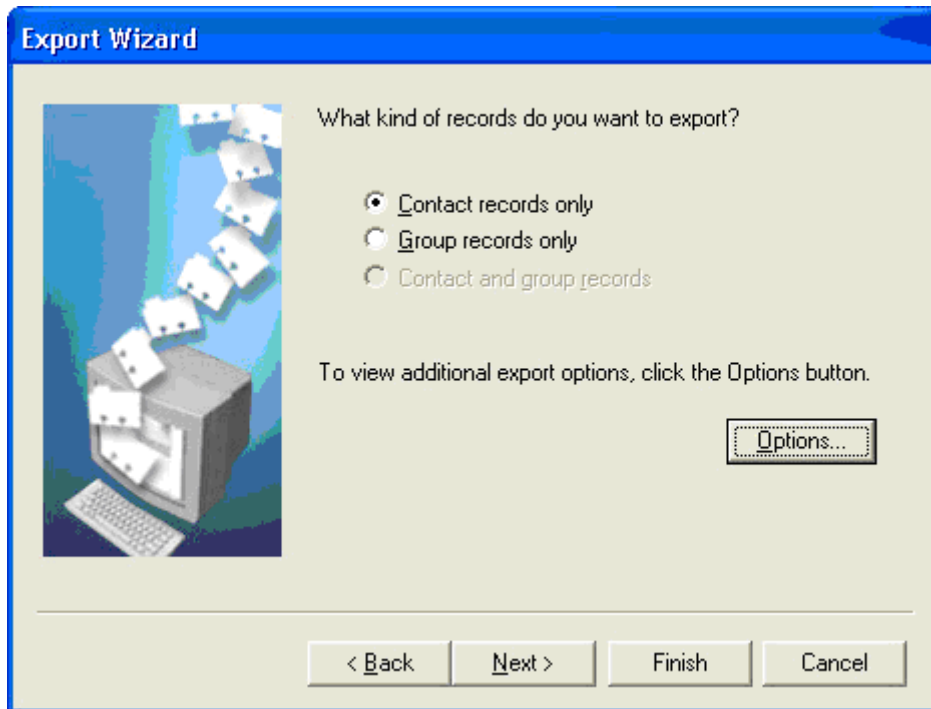
4. Select **Text – Delimited** from the File Type drop-down list and then click the File Name and Location **Selection** button.



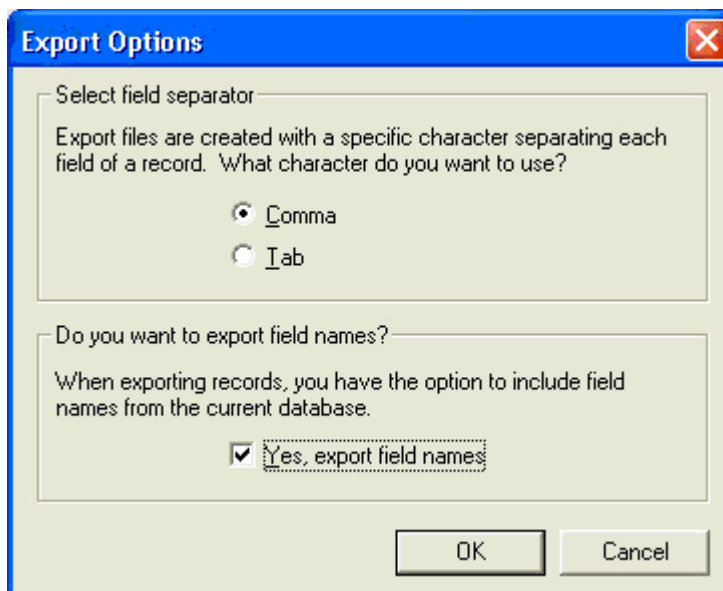
5. In the Save As dialog box, name the exported data file, select **Text – Delimited (*.csv)** from the Save as Type drop-down list, select a location to save the file and then click the **Save** button.



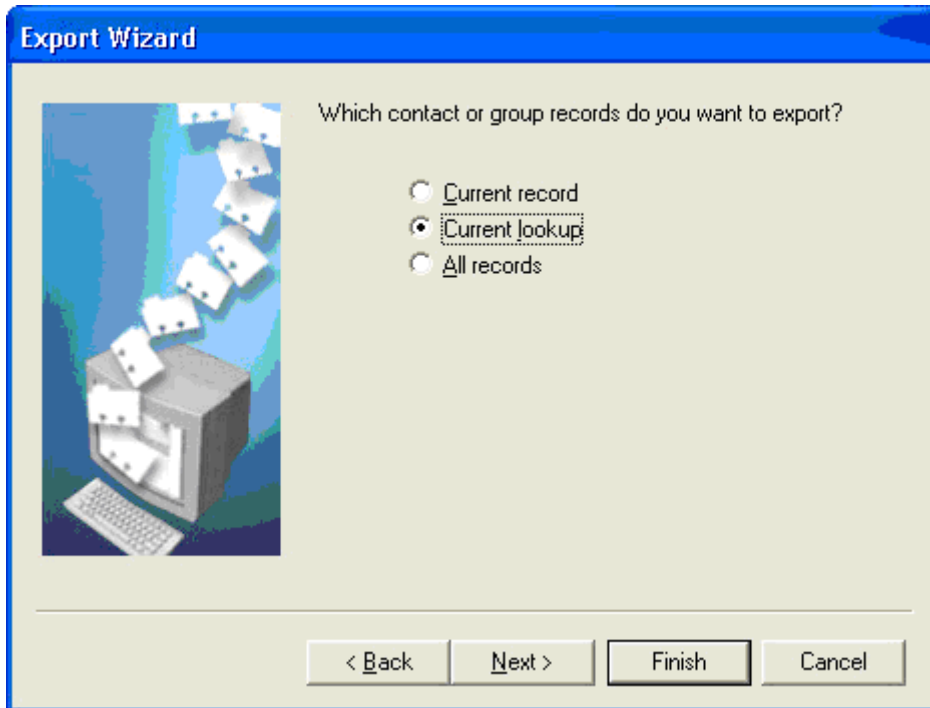
- In the Export Wizard dialog box, select the **Contact records only** option and then click the **Options** button.



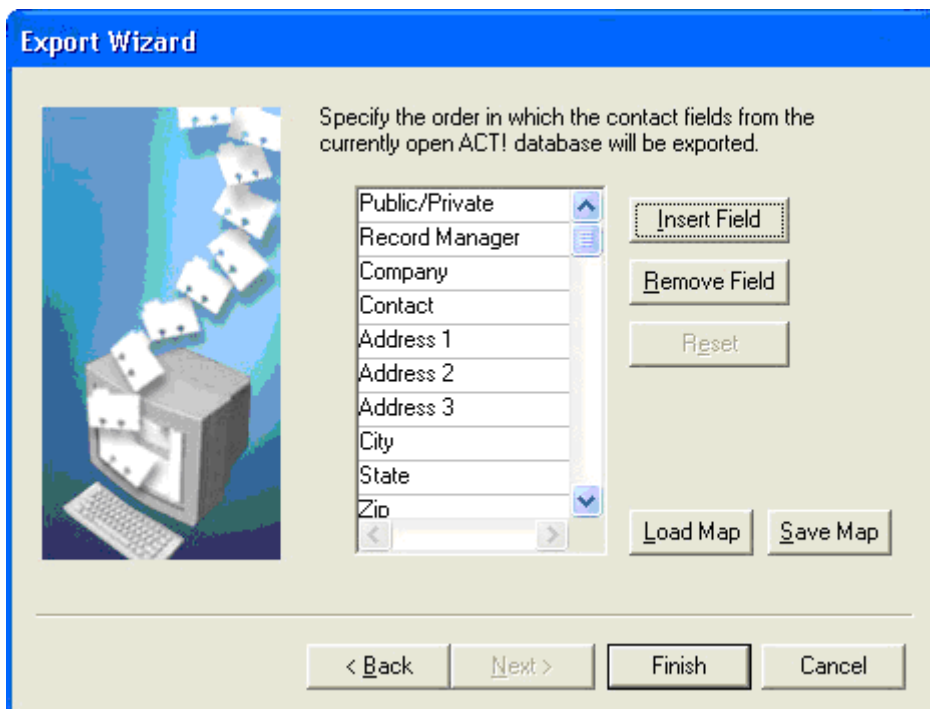
- Select the **Comma** and **Yes, export field names** options and then click the **OK** button.



8. Select the **Current lookup** option and then click the **Finish** button.



9. Specify the order of the fields to be exported and then click the **Finish** button.



- Open the exported .csv file in Microsoft Excel to display the exported information.

The screenshot shows Microsoft Excel with the following data in the spreadsheet:

	A	B	C	D	E
1	Public/Private	Record Manager	Company	Contact	Address 1
2	Public	Chris Huffman	Arcadia Ave. Florist	Jackie Jorgensen	7201 N. Arcadi
3	Public	Chris Huffman	Bechtel Corp.	Dylan Nguyen	5550 South We
4	Private	Chris Huffman	Boomer's Artworx	Emily Dunn	8907 E. Roseb
5	Public	Chris Huffman	CH Gourmet Gifts	Ernst Anderson	552 Everett Ave
6	Public	Chris Huffman	CH Gourmet Gifts	Jane Chan	13 East 54th S
7	Public	Chris Huffman	Continental Energy	Herman Getter	54 S. Utica
8	Public	Chris Huffman	Django Consulting	Michaela J. Zip	1111 Easy St.
9	Public	Chris Huffman	International Safari	Vivian Grace	486 Safari Dr.
10	Public	Chris Huffman	Manxsys Financial	Alexander O'Brien	2864 Yookland
11	Private	Chris Huffman	McMakin Cider Co.	Greg McMakin	615 Minette Dr.
12					
13					

- Select **Save** from the expanded **File** menu.
- Enter a **File name**, specify a **Save In** location, select **CSV (Comma delimited) (*.csv)** from the Save as Type drop-down list and then click the **OK** button to save the exported information.

If you have more questions about exporting from ACT!, contact ACT! Technical Support.

ACT! Support: <http://www.act.com/support/index.cfm>

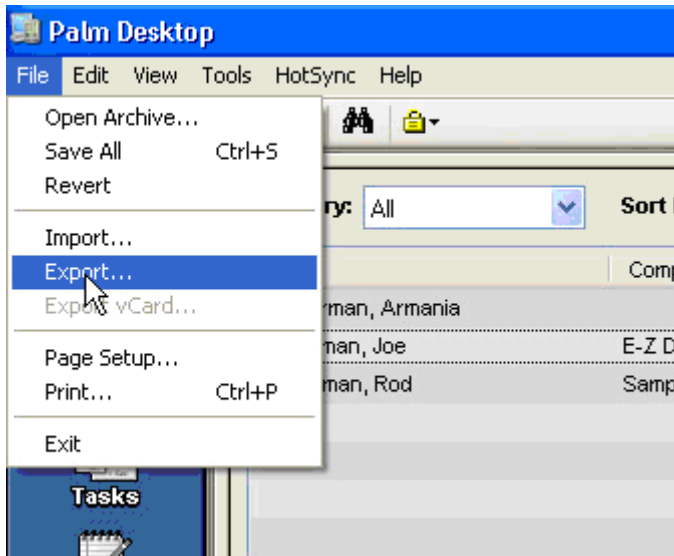
Exporting from Palm™ Desktop

- From Palm Desktop, click the **Contacts** button and then select the contacts you want to export; or, do not select any contacts in order to export all of them.

The screenshot shows the Palm Desktop interface with the following contact list:

Name	Company	Primary	Category
Barberman, Armania		714-555-3456 (H)	Personal
Ackerman, Joe	E-Z Data, Inc.	626-555-1234 (W)	Personal
Stifferman, Rod	Samples Inc.	626-555-4321 (W)	Business

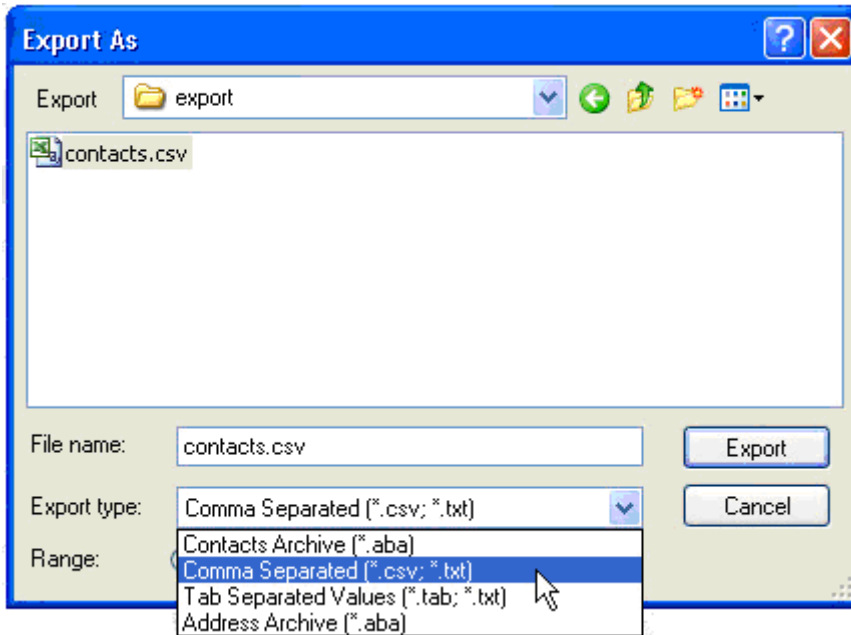
2. Select **Export** from the expanded **File** menu.



3. From the Specify Export Fields dialog box, check the fields of information that you would like to export and then click the **OK** button.



- Name the exported data file, specify a location to save the file, select **Comma Separated (*.csv, *.txt)** from the Export Type drop-down list, make certain to retain the .csv extension on the File Name and then click the **Export** button.



- Open the exported .csv file in Microsoft Excel to display the exported information.

	A	B	C	D	E	F
1	Ackerman	Joe		E-Z Data, Inc.	626-555-1234	
2	Stifferman	Rod	Manager	Samples Inc.	626-555-4321	
3	Barberman	Armania				714-555-3456
4						
5						
6						

6. Select **Save** from the expanded **File** menu.
7. Enter a **File name**, specify a **Save In** location, select **CSV (Comma delimited) (*.csv)** from the Save as Type drop-down list and then click the **OK** button to save the exported information.

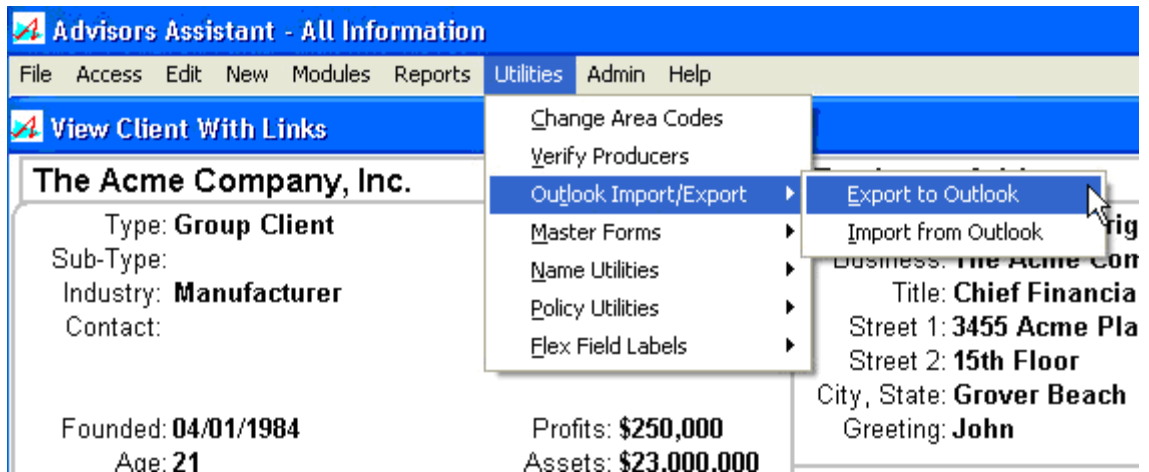
If you have more questions about the Palm export, contact Palm Technical Support.

Palm Support: <http://www.palm.com/us/support/>

Exporting from Advisors Assistant®

The Advisors Assistant contact information export is a two step process. First the information is exported to MS Outlook's Contacts section, then it is exported to a .csv file. Follow the instructions below to export the contacts to MS Outlook and then refer to the *Exporting from Microsoft® Outlook®* section to finish the process.

1. Note that Advisors Assistant can only export to the main MS Outlook Contacts folder. If you do not want to export these pre-existing contacts with the .csv, you will need to move them to a sub-Contacts folder.
2. In Advisors Assistant, select the **Utilities** menu item, and then select **Export to Outlook** from the expanded **Outlook Import/Export** menu.



3. Enter your export criteria if you want to export a certain set of contacts; or, leave the fields as they are and then click the **Search** button to export all contacts.

The screenshot shows the 'Outlook Selection Criteria - Name' dialog box within the 'Advisors Assistant - All Information' application. The dialog is divided into several sections:

- Search Description:** A text input field.
- Search Filters:** A grid of dropdown menus for Primary Producer, Name Type, Name Sub-Type, Occupation, Linked To, Relationship, Market, First Name, Company Name, Area Code, Mailing Option (set to 'Both'), Email (set to 'All'), Organization/Client (set to 'Either'), Gender (set to 'Either'), Head of Household (set to 'Either'), Dependent Status, Birth Month (set to 'Any Month'), Wed. Anniv. Month (set to 'Any Month'), Tax ID, City, State, and Who Changed.
- Search Range:** A table of search criteria with 'Search From', 'Search Range', and 'Search To' columns.

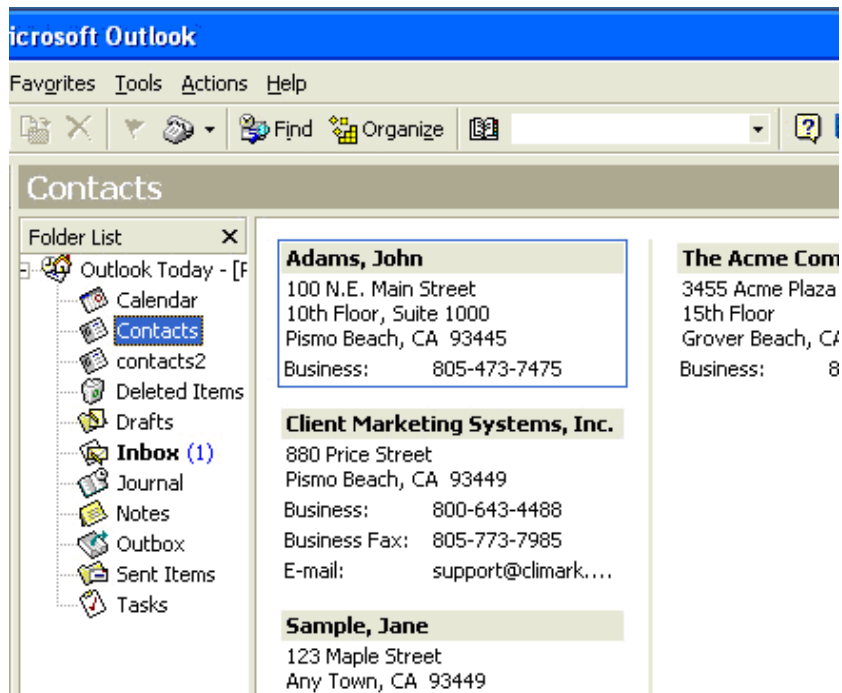
Search From	Search Range	Search To
No Date Of Birth	Name Range	No Upper Limit
No Anniversary	Birthdate	No Upper Limit
No Earned Income	Wed. Anniv.	No Upper Limit
No Total Income	Earned Income	99999999
No Net Worth	Total Income	99999999
No Dependents	Net Worth	99999999
No Zip Code	Dependents	99999999
	Zip Code	No Upper Limit
	Last Changed	No Upper Limit
- Buttons:** Search, Cancel, Clear, Load, Save, Name Flex, Policy, Policy Flex, Underwriting, Help.

4. Select the **Process Selected Contacts** option, clear the Process Calendar option, and then click the **OK** button.

The screenshot shows the 'Outlook Synchronization' dialog box. It contains the following elements:

- Process Selected Contacts:** Process Selected Contacts
- Process Calendar:** Process Calendar
- Calendar Criteria:**
 - Entire Calendar For: E-Z Data
 - Starting on: 12/27/2005
 - Ending on: 01/27/2006
 - Export Birthdays & Anniversaries
 - With Notes
 - ToDo's
 - Export: Appointments
 - Both
- Buttons:** OK, Exit, Help.

5. Open MS Outlook to view the exported contacts in the Contacts folder.



6. Refer to the *Exporting from Microsoft® Outlook®* section above to continue the process of exporting to a .csv file.

If you have more questions about exporting from Advisors Assistant, contact Advisors Assistant Technical Support.

Advisors Assistant Support: <http://www.advisorsassistant.com/support.htm>

Third Party Support Links

ACT! Support:

<http://www.act.com/support/index.cfm>

Advisors Assistant Support:

<http://www.advisorsassistant.com/support.htm>

GoldMine Support:

<http://www.frontrange.com/Support/Category.aspx?id=194&ccid=62>

Microsoft Outlook Support:

<http://support.microsoft.com/oas/default.aspx?LN=en-us&gprid=2520&x=10&y=17>

Palm Support:

<http://www.palm.com/us/support/>