

## Introduction

MaxPort – Version 5.0 is a 32-bit application specifically designed to transfer your existing contact management data into Maximizer. Its simple! You can import [Company](#), [Individual](#) and [Contact](#) data into Maximizer from applications ACT!, GoldMine, Lotus Organizer, Clipper, dBase, FoxPro, FoxBase or other ASCII files.

With MaxPort you can also save import specifications as templates to simplify and automate importing data into Maximizer.

Due to file changes, MaxPort – Version 5.0 will work only with Maximizer 5.0, Maximizer Enterprise 4.0 and subsequent releases of either product.

To obtain a copy of MaxPort that will work with previous versions of Maximizer, visit our Web site at [http:// www.maximizer.com](http://www.maximizer.com).

## Importing Other Contact Management Databases into Maximizer

You can import your contact management data directly into Maximizer from other applications such as ACT!, GoldMine, Lotus Organizer, Clipper, dBase, FoxPro, FoxBase or from any character delimited ASCII files. Once you've imported the information into Maximizer, it is categorized into three main types: Companies, Individuals and Contacts. These are stored in an Address Book folder.

**Note:** If you are importing data from ACT!, use the Import > ACT! Database option on the File menu in Maximizer.

**Warning** – Before you begin the import process, back up your existing target Maximizer Address Book folder, if you have one. This ensures that if for some reason you ever need this information, or if anything interferes with the import process, you can restore your original Address Book Folder and start again.

When you are importing data from a Contact Management Database an application called MaxPort is launched. It is a tool used to import contact management data and it automatically recognizes and maps all fields in Maximizer. User-defined fields are also automatically created and mapped.

The type of database file format you identify in the import procedure determines what import features are available in MaxPort. If you are importing data from ACT!, GoldMine, Lotus or Organizer, MaxPort automatically recognizes and maps all fields in Maximizer. User-defined fields are also automatically created and mapped. With other applications such as dBase, FoxPro and Clipper, or a similar type of program, you have to map the fields manually. Note, this is not a time consuming process, you simply have to select the fields you want to have included in your Maximizer Address Book folder.

1. In Maximizer, select Import > Other Contact Manager Database from the File menu. MaxPort is launched and the Import Databases dialog appears.
2. Select the file format of the database you are importing from the List Files of Type drop-down list.
3. Locate the file you are importing. If the file is a network file, click the network button or use the Drives field drop-down list to access your network drive.
4. In the Import Options box, select the options you want to include – Skip First Record, Log Errors to File, Make Salutation and Receive Mail. Depending on what type of database you are importing, some of these options may not be available.

If you are importing a character delimited ASCII (.txt) file, you must specify a Date Format. To do so, click the Date Format button. Once you've selected the format on the Date Format dialog box, click OK. You must also identify the character used as the field delimiter in the import file. Click on the Delimiter button and select the delimiter type: comma, tab or semicolon in the Delimiter dialog box. If the character used as a delimiter in the import file is not listed, select Custom and type the character in the field. Click OK to close the Delimiter dialog.

5. Specify how you want duplicate records handled. Your options include: Do Not Check for Duplicates, Combine Entries with the Same Name or Reject Duplicate Records. When you're finished specifying the import options, click OK on the Import Databases dialog box. The Select Target Address Book Folder dialog box appears.

Maximizer requires that each Address Book entry be assigned a unique Address Book entry ID. If the import record contains an Address Book Entry ID that is the same as an existing Maximizer Company, Individual, or Contact, the Address Book Entry ID of the imported entry is automatically changed when that entry is added to the Maximizer Address Book folder and this action is recorded in the import error message file.

6. From the list of available databases, select the Maximizer Address Book folder that is to receive the imported data. To create a new Maximizer Address Book folder to receive the imported data, click the New button.
7. If the import file is a type for which MaxPort automatically maps the fields, the import process starts immediately. During the import process, a status indicator will appear on your screen. Click on Cancel if you want to halt the import process.

8. If the import file is a type that MaxPort requires you to specify how fields in the import file are to be mapped in Maximizer, the Select Fields for Import dialog appears. For instructions on how to map fields, see [Mapping Fields in MaxPort](#).
9. Once MaxPort imports the data from the import file into Maximizer, the Conversion Completed or Import Completed message box appears displaying the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings. Click OK to close the message box.
10. The Error Log appears next displaying the location of the import error message file. If you want to view this file, you may want to make a note of where it is located. Click OK on the Error Log message box. Unless MaxPort reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

## Importing an ACT! Database into Maximizer

You can import your ACT! contact management data directly into Maximizer in a few simple steps. Once you've imported the information into Maximizer, it is categorized into three main types: Companies, Individuals and Contacts. These are stored in an Address Book folder.

**Warning** – Before you begin the import process, back up your existing target Maximizer Address Book folder, if you have one. This ensures that if for some reason you ever need this information, or if anything interferes with the import process, you can restore your original Address Book Folder and start again.

When you are importing data from ACT!, an application called MaxPort is launched. It is a tool used to import ACT! contact management data and it automatically recognizes and maps all fields in Maximizer. User-defined fields are also automatically created and mapped.

### ∅ To import ACT! data into Maximizer

1. In Maximizer, select Import > ACT! Database from the File menu. MaxPort is launched and the Import Databases dialog appears. The file format of an ACT! database (.blb) is automatically selected for you.
2. Locate the file you are importing. If the file is a network file, click the network button or use the Drives field drop-down list to access your folder.
3. In the Import Options group box, select the Log Errors to File option if you want to log all errors that occur during the import process to a text file. All other options in the Import Options group box are handled automatically by MaxPort.

The Date Format and Delimiter buttons apply only to character delimited ASCII (.txt) files.

4. Specify how you want duplicate records handled. Your options include: Do Not Check for Duplicates or Combine Entries with the Same Name. When you're finished specifying the duplicate records options, click OK. If duplicate records are found in your data, the option you select here determines whether duplicate records are combined or not. They will be added to your Address Book folder. The Select Target Address Book Folder dialog box appears.

Maximizer requires that each Address Book entry be assigned a unique Address Book entry ID. If the import record contains an Address Book Entry ID that is the same as an existing Maximizer Company, Individual, or Contact, the Address Book Entry ID of the imported entry is automatically changed when that entry is added to Maximizer and this action is recorded in the import error message file.

5. From the list of available databases, select the Maximizer Address Book folder that is to receive the imported ACT! data. To create a new Maximizer Address Book folder to receive the imported data, click the New button.
6. The import process starts immediately. During the import process a status indicator will appear on your screen. Click on Cancel if you want to halt the import process.
7. Once MaxPort imports the data from the import file into Maximizer, the Conversion Completed or Import Completed message box appears displaying the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings. Click OK to close the message box.
8. The Error Log appears next displaying the location of the import error message file. If you want to view this file, you may want to make a note of where it is located. Click OK on the Error Log message box. Unless MaxPort reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

**Note:** For more information on importing contact management data, please refer to the MaxPort online help. You can access it directly from the MaxPort 5.0 Help menu or by pressing F1 once the main MaxPort application window appears.

## Mapping Fields in MaxPort

If the import file is a type for which you are required to specify how fields in your existing database are mapped to Maximizer, the Select Fields for Import dialog appears. This is where you perform your field mapping. A list of all the fields that are available in Maximizer, for Contacts, are shown in the upper left portion of the window. Directly below that is a list of all fields available for Companies and Individuals. The list on the right side of the dialog box is a display of all fields contained in the database you are importing.

You can also create templates for mapping fields. See [Mapping Fields Using a Template](#).

### ∅ To map fields from your import file to Maximizer:

1. Select a Maximizer field you want to associate with the first import field shown in the Import file list, then click Add. This will move the field to the Order of Import list.
2. Repeat this step for each field you want to include in the import process. If there is a field in the Import file list you don't want to include, select 'Skip Field' and add it to your list.
3. Once you've added all the fields you want to include in your Maximizer database, click Import.
4. MaxPort displays a status dialog box during the import process. Click Cancel if you want to stop the import prematurely.

Once MaxPort imports the data from the import file into the Maximizer, the Conversion Completed or Import Completed dialogue box appears displaying the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings. Click OK to close the message box.

The Error Log dialogue appears next displaying the location of the import error message file. If you want to view this file, you may want to make a note of where it is located. Click OK. Unless MaxPort reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

## Mapping Fields Using a Template

If you want to create a template definition, just set up the import structure by selecting the database type and fields you want to include in the template, then click Save. By default, templates are saved to the same directory you have specified for your Maximizer database. You can save them to a different directory if you want.

### Ø Mapping fields using a template:

1. If you have set up a template for a specific database format and field sequence, click the Open button in the Template section of the Select Fields for Import dialog box. A file browse dialog box appears.
2. Locate the template file using the browse dialog. Note that templates have a file extension of .itp.

## Changing the Sequence in the Order of the Import List

Once fields have been added to the Order of Import list, each field must be moved separately when changing the sequence of order in the list.

1. Select the first field that is out of sequence from the Order of Import list and click Remove. It will move back to one of the Import file lists.
  2. From the Import file list, select the field you are re-inserting into the import sequence (Order of Import List).
  3. Select a field, in the Order of Import list, that is in the position where you want the field re-inserted. Note that when the field is re-inserted it will be placed directly below the field that is currently selected in the Order of Import list.
  4. Click Add. Repeat steps 1 – 4 for each field you want to move in the list until the fields are properly sequenced.
- ∅ To permanently remove a field from the Order of Import list, select the field and click Remove.

## Tips

### ∅ Two Stage Importing

Fields from some applications such as ACT! are automatically mapped by MaxPort to the corresponding Maximizer fields. MaxPort automatically creates and names Maximizer [UDFs](#) for any user-defined fields found in the imported file. This may create difficulties if the import field contains data that belongs to a UDF that exists in the Maximizer Address Book.

To resolve these field naming problems, we recommend that you import the data to a new temporary Maximizer database. Using Maximizer, you can then modify the name of the automatically created UDFs to the names of the target UDFs in the final Maximizer Address Book. When you have completed the renaming process, you can then use the Maximizer built in data transfer utility to transfer the data from the temporary Maximizer address book folder into the final destination Maximizer address book folder.

### ∅ Location of the Import Error Message File

If an import process generates an error message(s), the file ERRORLOG.TXT is created in the directory where the source import files are located.



## Troubleshooting

### **After I imported information, Maximizer lists all entries as Address Book entries, including Contacts, but I wanted only Company and Individual Address Book entries. What went wrong?**

To import only Companies and Individuals as company Address Book entries, do not import contact information for records containing the Company. This includes the following fields listed under Available Company Fields in the Select Fields for Import dialogue box:

First Name [Company]  
Initial [Company]  
Last Name [Company]  
Mr/Mrs [Company]  
Position [Company]  
Salutation [Company]

### **What parameters are used when MaxPort updates Company and Individual records in Maximizer with Contact information from my import file?**

If a Company or Individual Address Book entry exists and Contact information has been added to records that are updated, the Contact information is added. In order for this to occur the Contact records must contain:

- ∅ A company name
  - and –
- ∅ The first name, initial, last name or full name of the contact. If there is no last name, the Maximizer database field is blank.
  - or –
  
- ∅ The Address Book entry ID

### **What parameters are used when MaxPort updates Company and Individual records in Maximizer with Notes and user-defined fields (UDFs) from my import file?**

If a Company, Individual, or Contact exists, Notes are added. If the Company, Individual or Contact does not exist, the note record is rejected. If the note is for a Contact, the record must also contain the first and last name of the Contact.

If the Maximizer [UDF](#) is numeric, alphanumeric or a date, MaxPort imports data from the import record if no data exists in the Maximizer database field. If data does exist, the field is NOT updated and the incoming data is ignored. If the Maximizer UDF is a table, MaxPort adds the data.

### **I cannot find the error messages for an import I completed yesterday. The messages in the file are for an import I did today.**

MaxPort overwrites the ERRORLOG.TXT file if one already exists in the directory where the source import file is located. Be sure to rename an existing import message file BEFORE running another source import file in that directory if you want to keep the messages.

**Skip First Record**

Select this option if the first record in the import file contains the field names in the database, rather than information about an actual contact.

**Log Errors to File**

Select this option if you want any errors that are generated during an import process to be logged in a text file. If you select the Log Errors to File option, they are logged in a file called ERRORLOG.TXT. Note, each time you import data from the same directory, the error file is overwritten with information from the most recent import. You can prevent this by renaming an existing error file. By default, this file is generated in the same directory as your import file.

**Make Salutation**

Select this option if you want a salutation to be created for each Individual and Contact being imported. If you select the Make Salutations option and the record contains a Mr. or Ms. field, the salutation will be Dear Mr. [last name] or Dear Ms. [last name]; if it does not have a Mr. or Ms. field and it contains a first name, the salutation will be Dear [first name].

**Receives Mail**

Select this option if you want to flag the Contacts you are importing to receive mail you send to their associated Company or Individual.

**Combine Companies with the Same Name**

Select this option to import records with identical company names as a Company with multiple contacts.

**Note:** To import records so that the contacts associated with a particular Address Book entry are imported into Maximizer as a company or individual Address Book entry with multiple contacts, arrange the records in the import file so that the company or individual record appears before the associated contact records.

**Do Not Check for Duplicates**

Select this option to import records without checking for duplicates. Records with identical company names or individual first name and last name combinations are assigned a unique Address Book entry ID.

**Reject Duplicate Records**

Select this option to not include records that contain an identical company name, an identical individual first name/last name combination, or an identical unique Address Book entry ID in the import data.



**Company definition**

In Maximizer, a Company is a type of Address Book entry that represents a group of people such as an organization, association or business. A Company address often has associated Contact entries. See also *Individual* and *Contact*.

**Individual definition**

In Maximizer, an Individual is a type of Address Book entry that represents an individual at a company level. Often, these are individuals are self-employed, or represent themselves. Examples of Individuals are doctors, lawyers or accountants. See also *Individual* and *Contact*.

Note, if both name and company information is present in a record being imported and those fields are mapped to the Maximizer name fields (for example, Last Name [Company] and First Name [Company]) AND the Maximizer company fields (for example, Company [Company]), that record is imported as an individual.

**Contact definition**

In Maximizer, a Contact is a type of Address Book entry that represents a person who is associated with a Company or Individual Address Book entry. See also *Individual* and *Contact*.

**Address Book Folder definition**

In Maximizer, an Address Book folder represents a database where you typically store address and telephone information about your prospects, customers and suppliers. In addition to address information, you also maintain information about appointments, activities, documents and notes for the associated Companies, Individuals and Contacts.

**Address Book ID definition**

In Maximizer, an Address Book ID is an identification code assigned to an Address Book folder entry. This ID is assigned automatically each time you make an entry in Maximizer however you may override the ID assignment and enter it manually.

**User Defined Field (UDF) definition**

In Maximizer, User Defined Fields (UDFs) are field names used to classify specific information about a Company, Individual or Contact. These may be of any criteria you want to use.

**Field Mapping definition**

Specifies where the fields in your import file are to be copied in the Maximizer database.

For example, your import file contains records of different organizations and each record identifies the name of the organization, as well as its address, city, and telephone number. The map specifies the equivalent fields in the Maximizer Address Book folder. This map is then used by MaxPort to copy the data from your import file to the Maximizer Address Book folder.

<b>Import File Field</b>	<b>Maximizer Address Book Field</b>
Company	Company [Company]
Address	Address Line 1 [Company]
City	City [Company]
Telephone	Phone 1 [Company]

**Templates definition**

In MaxPort, you have the option of saving the structure of your file mapping when you are importing data. Saved versions of file mapping become templates, which can be used to automatically map your fields into Maximizer. By default, these files are saved to the same file directory as your Maximizer database and they have a file extension of .itp.



**Duplicate Records definition**

A duplicate record is a record with a field which contains a company name, first name/last name combination, or an Address Book entry ID that is identical to a preceding record.

The Duplicate Handling option determines how these records are imported into your Maximizer Address Book folder.

Ø If your import file contains a record having:

A company name identical to a preceding record, you can choose to import that record as a contact for the company specified on the preceding record, as an individual Address Book entry, or you can choose to skip (omit) the record.

A first name/last name combination identical to a preceding record, you can choose to import that client record as a contact for the individual specified on the preceding record, as an individual Address Book entry, or you can choose to skip (omit) the record.

