

Overview of OAK!Merge

Field-by-Field Merge of Data into ACT!



For more information, please visit

www.oakmerge.com

- Unlimited uses: Conversions, updates, mass deletes, and clean up databases. Update sales info in ACT! with mainframe data matching on customer number, Update sales territory matching on zip code, import trade show or web leads or update lead status from Remote Reps
- Add, Update, Skip, or Delete records from any of ACT!'s "updateable" tables: Contact, Group, Company, Product, or Opportunity. Match on one or more fields, if updating is desired
- Append data to Notes, History, Activities, Custom tables, Users, and Secondary Contacts; while linking them to Contacts, Companies, Opportunities or Groups.
- Use ID numbers or Name fields to do the linking
- Migrate Salesforce data from a Salesforce backup into ACT! with one click using the Enterprise Edition.
- Read data from CSV, TAB, Excel, Access, or ACT or external data like SQL linked to an Excel or ACCESS database
- Use with unlimited number of ACT! Databases
- Updates ONLY the ACT! fields you specify. All other ACT! data remains unchanged. Add constant values or use transformations such as TRIM or PROPER CASE as part of mapping the data.
- Adds Contacts to be members of static groups
- Provides "mapping" to define which field(s) to update and which field to match on; maps can be saved & reused later. Profiles include mappings
- Profiles also allow saving Source files, Target files, and logins; as well as the mapping
- Run OAK!Merge from a scheduler in unattended batch mode