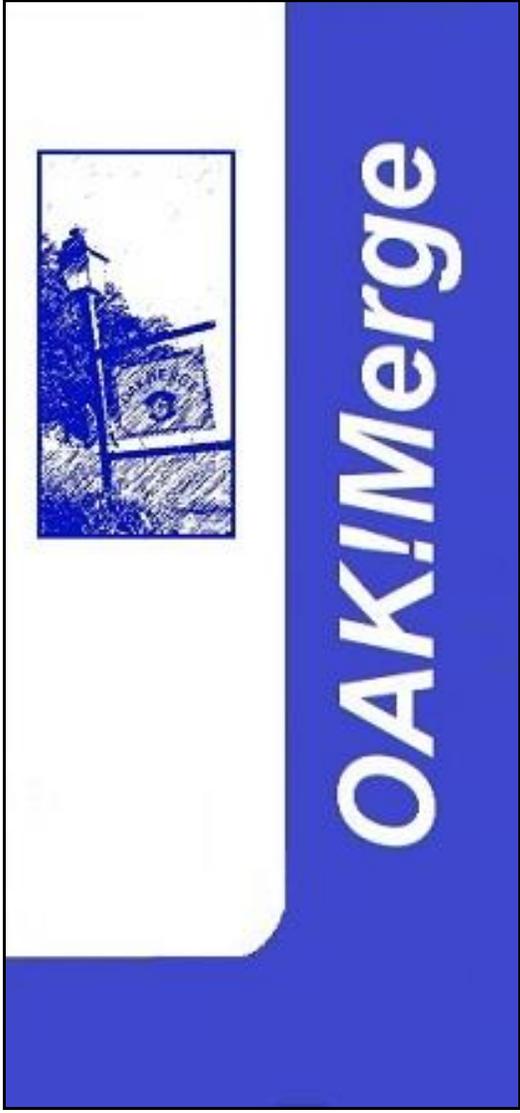




OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

	 <h2>User Guide v25.1.1</h2> <p>OAK!Merge for Act! is the leading data import, export, and update utility for</p> 
--	--

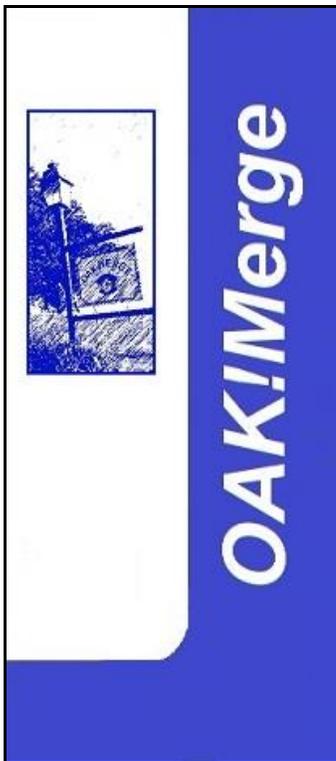


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What OAK!Merge can do for you:



- Unlimited uses: update sales info in Act! with mainframe data matching on customer number, update sales territory matching on zip codes, import trade show or web leads, etc.
- Add, Update, Skip or Delete records from any of Act!'s "updateable" tables: Contact, Group, Company, Product, Opportunity, Secondary Contacts, or Custom Tables. Match on one or more fields for updating.
- Append data to Notes, History or Activities and link them to Contacts, Companies, Opportunities, or Groups. Delete History and notes.
- Export all data in a selected table
- Import Act! Users or Copy Users from one Act! database to another
- Updates ONLY the Act! fields you specify. All other Act! data remains unchanged
- Allows constants, key words, or transformations to be done 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 and Target files as well as the mapping
- Run OAK!Merge from a scheduler in unattended batch mode



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Preface

Warning! OAK!Merge updates your Act! database. Make a backup copy of your database before using this product. **ALWAYS** execute a sample request on a test Act! database before using OAK!Merge on your production database.

Disk Space Caution: Each time you execute a merge, OAK!Merge can create a log file that contains specific information about each contact record processed by OAK!Merge. Make sure you have enough disk space to hold a potentially large file.

Caution: If you merge data into Act! fields that have the History attribute on, Act! creates a History record for each field updated. If Synchronization is enabled, Act! creates a record for the Transaction Synchronization Log Database.

Use Caution When Updating Contact Names. First Name, Last Name, Prefix, Suffix are **not** updatable fields. See Appendix 2 on Contact Name updates for more info. When using an OAK!Merge action that updates the Contact field, OAK!Merge automatically updates the First Name, Last Name, and Salutation fields according to Act! Preferences for Names. Contact names can be blank, but a period is inserted as the last name as a place holder. It can be deleted in Act!."

TIP: If you are matching and adding and you have multiple rows for the same contact; OAK!Merge recognizes that as a duplicate and will only take the first one to update the matching contacts. Blanks count as valid data to match on.

You can sort the CSV in date order before importing it; to get the one you want used for your import.

NOTE: If Act! is open, you must Refresh to see the data updates.
VIEW REFRESH

See the warranty section for terms and conditions of use.



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Section 1: Overview of OAK!Merge

OAK!Merge Versions: There are 6 versions of **OAK!Merge** currently released: Trial, Basic, Standard, Advanced, Pro, and Enterprise. You can purchase at any level and upgrade to any level.

- Basic version includes merges to Contacts and Companies
- Standard version also includes merges to Notes, History and Groups
- Advanced version also includes merges to opportunities, activities, products, unattended merges, EXCEL and ACCESS support
- Pro version also includes Secondary Contacts, Custom Act! Tables and Act! Table to Act! Table Merges
- Enterprise Version with Salesforce Data Migration Kit imports data from a Salesforce data backup into Act! with one click.

OAK!Merge v25 is compatible with **Act!** 24, and 25 Desktop versions only, i.e. PRO, Standard, Corporate, or Premium (not Act v23 or earlier)

OAK!Merge v24 is compatible with **Act!** 18, 19, 20, 21, 22, 23, and 24, i.e. PRO, Standard, Corporate, Premium, Premium Cloud, **Act!** for Web server, and Act! 365

Not all current features of OAK!Merge will work with previous versions of Act! or on all current versions. The Cloud, Web, and Act 365 use the Act! API which is more limited in features and no longer fully supported.

OAK!Merge internal code generations share code and features:

- Gen 0: Act! 4, 5, 2004 and 6 (these use OAK!Merge v6 only)
- Gen 1: Act! 2005 v7 & 2006 v8 SQL versions are not supported
- Gen 2: Act! 2007 v9 and 2008 v10.0 versions are not supported
- Gen 3: Act! 2008 v10.2 and 2009 v11 versions are not supported
- Gen 4: Act! 2010 v12 to v21 Last Perpetual Standard and API
- Gen 5: Subscription Only: Act! v22 to v24 Standard and API (supports Act v18 to v24 and possibly later on)
- Gen 6 64 Bit Act: v25 and later; Desktop only

See the Feature Roadmap in Appendix 3 for more information and details.



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Section 2: Using the OAK!Merge Wizard

After initial installation, **OAK!Merge** will operate in Free Trial mode for 10 days and write up to 10 records per merge. After 10 days, if it has not been activated, it will not allow Trial runs to update Act!. It may be activated to use more features at any time without reinstalling via the Tools button. See Activation section below for more information.

OAK!Merge uses a simple 1-2-3-4 wizard. There is a welcome screen where you can pick a predefined merge via a Profile or you can configure and execute a merge in 3 more steps

1. Welcome; pick an existing profile or Next button
2. Pick source and target data sources
3. Map data and select matching/linking options
4. Execute

This manual goes through examples of merges to each area of Act! using the Act! demo database as a target. The sample source fields are in the OAK!Merge Samples file folder.



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Example 1: Merge FROM a CSV to Act! Contact Fields

Start **OAK!Merge**:

After installation you will find the **OAK!Merge** program in START, **OAK!Merge** for **Act!**

The splash screen appears when the program launches



Advanced Tip: You can run multiple instances of OAK!Merge at the same time. Just start additional sessions as needed. Each runs independently and can be using the same or different databases. This is great for testing while a large production merge is running.



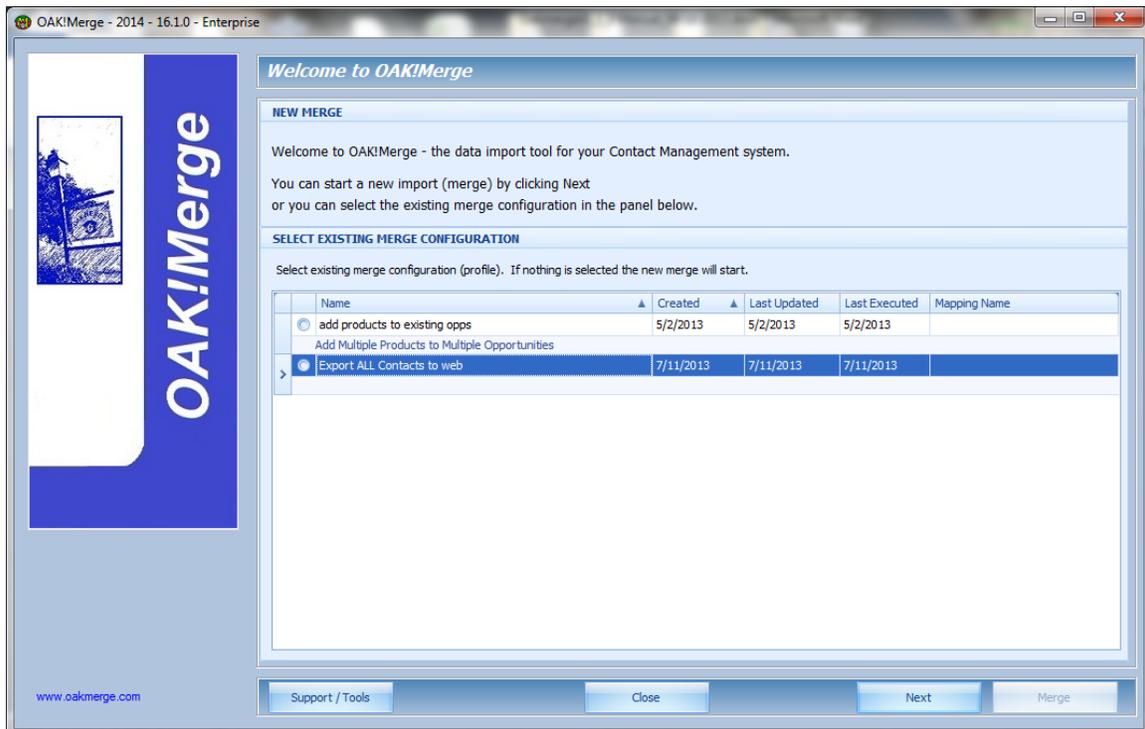
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Step 1 of 4: Beginning a New Merge

Page 1 of the Wizard will appear. Here you can select an existing merge configuration called a "Profile" if any have been saved. In the screen shot below, 2 existing Profiles have been previously saved. This feature is discussed later.





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MATCHING vs. LINKING:

OAK!Merge merges or appends data from an external file into an **Act!** database on a field-by-field basis. You can use a variety of import source files as your input, you specify one or more **Act!** fields to match on, and you can specify the **Act!** fields to update. You can also link some records to others, such as linking a history record to a contact. In OAK!Merge terms Matching is to find and update an existing record, whereas Linking is to connect 2 records together. Merges do not have to use matching or linking to just add records to Act!

OAK!Merge supports the following relationships to connect one record to another

- linking contacts to companies
- linking contacts to groups
- linking companies to a parent company
- linking group to a parent group
- linking opportunity to contact, company
- linking note, activity, history to a company, contact, opportunity

Linking is handled by GUID, Name or OAKMergeID of the corresponding record (groups do not have OAKMergeID). A GUID is unique internal ID Act! uses. It is an acronym for Globally Unique Identifier

A key capability in OAK!Merge is you decide IF you need to match (to update) and then what to do if you match versus what to do if you don't match. This means you can specify what action to take if data in the input file matches records in the **Act!** database and what action to take if data in the input file does **not** match any records in the **Act!** database. **OAK!Merge** updates only the specified field(s) in the **Act!** database; all other **Act!** fields remain unchanged.



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Merge Rules

Zoho Table: Accounts

Delimited File (csv or txt) Table: CSV Table Display Mapped Only

Merge Source	Source: Delimited File (csv or txt...)	Matchin...	Target: Zoho Field	Target: Z...	Data Type	Transformation Rule
> Source Table...	OAKMergeID	<input checked="" type="checkbox"/>	Record Id	id	String	No Transformation
Source Table...	INITIALCONTACT	<input type="checkbox"/>	Rating	Rating	String	No Transformation
Source Table...	F	<input type="checkbox"/>	Fax	Fax	String	No Transformation

MERGE RULES (related to matching)

If a Match is Found: Update If a Match is NOT Found: Skip

Field Update Condition: All fields are updateable

- All fields are updateable
- Only blank fields are updateable
- Only fields with data are updateable

Support / Tools

At the field level there are 3 options and several transformation overrides.

1. Default is **all fields are updateable** BUT only update the target it there is source data.
2. **Only blank fields are updateable**: Update Fields only if there is source data AND target data
3. **Only fields with data are updateable**: Update fields only if there is source data AND target data is blank (this is updating only empty fields in the target.)



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MERGE RULES (related to matching)

If a Match is Found: Update

If a Match is NOT Found: Add

Field Update Condition: All fields are updateable, Only blank fields are updateable, Only fields with data are updateable

A more detailed description of above 3 options is:

1. **Only blank fields are updateable:** Default is all fields are updateable BUT only update the target if there is source data. If there is data in an Act! field and no data in the corresponding source field, then no change is made in Act! unless a transformation is selected to force a blank. The default is OAK!Merge does not replace data in Act! with nothing. The transformation changes it to force a blank in the target if there is data in the source.
1. **Only blank fields are updateable:** Update Fields only if there is source data AND target data. This works like #1 except it skips all the fields where the target is blank, regardless of what is in the source.
2. **Only fields with data are updateable:** Update fields only if there is source data AND target data is blank (this is updating only empty fields in the target.) This skips all fields in the target that are blank, regardless of what is in the source.

If you don't select any fields to match on then you will append all the records. You can still do linking if you are using matching or not.

OAK!Merge dedups the source file using what you select as matching fields.



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You are guided through the **OAK!Merge** process in three main steps using Wizard-style screens. Each step focuses on various options, selection criteria and field mappings specific to a merge. You can save the settings for a merge in a named data map for repeated use with future merges.

There are six buttons available on some of the Wizard screens:

- **Tools/Support:** View the support, activation, and documentation of **OAK!Merge**
- **Close:** Exit **OAK!Merge**
- **Back:** Move back to the previous Wizard screen
- **Next:** Move forward to the next Wizard screen
- **Start Over:** Start at page 1 of the Wizard
- **Merge or Run:** Perform the merge



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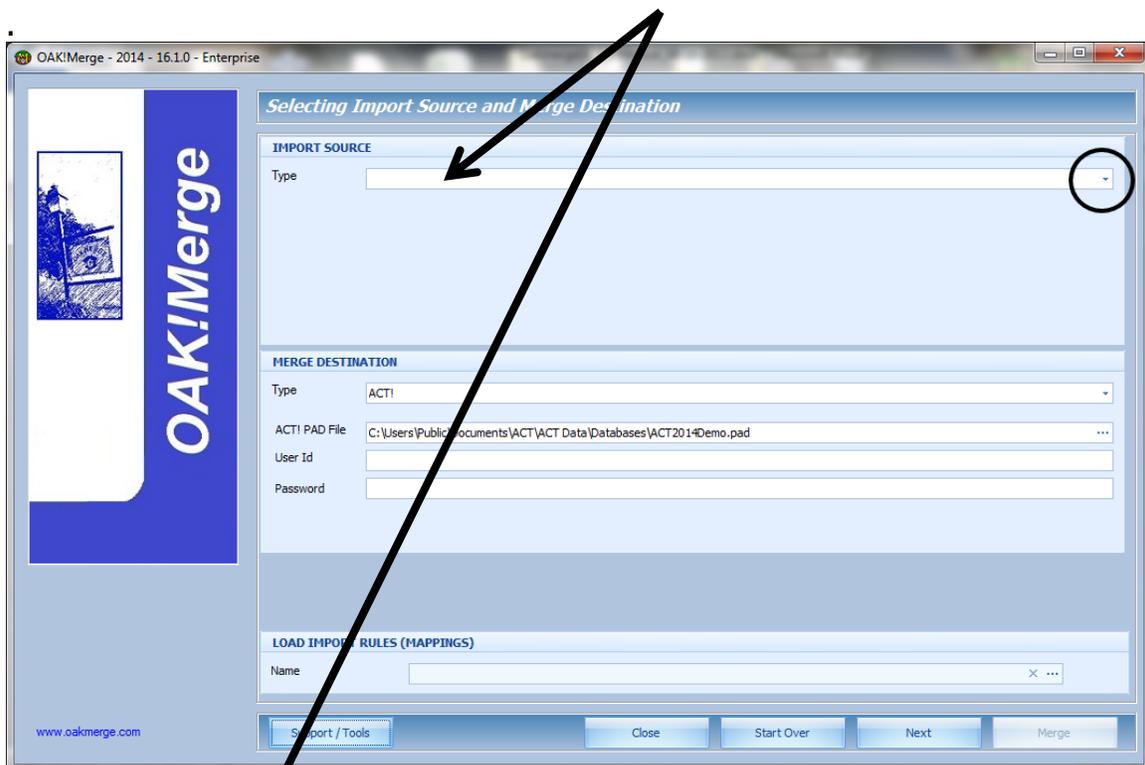
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Click on Next

Screen 2 of the Wizard appears: Selecting Merge Destination and Import Source.

Browse to an import source file by selecting Delimited for TYPE and clicking on the 3 dots at the end of the File box to select a CSV to TXT file.

Or double click in the white area of the file name box





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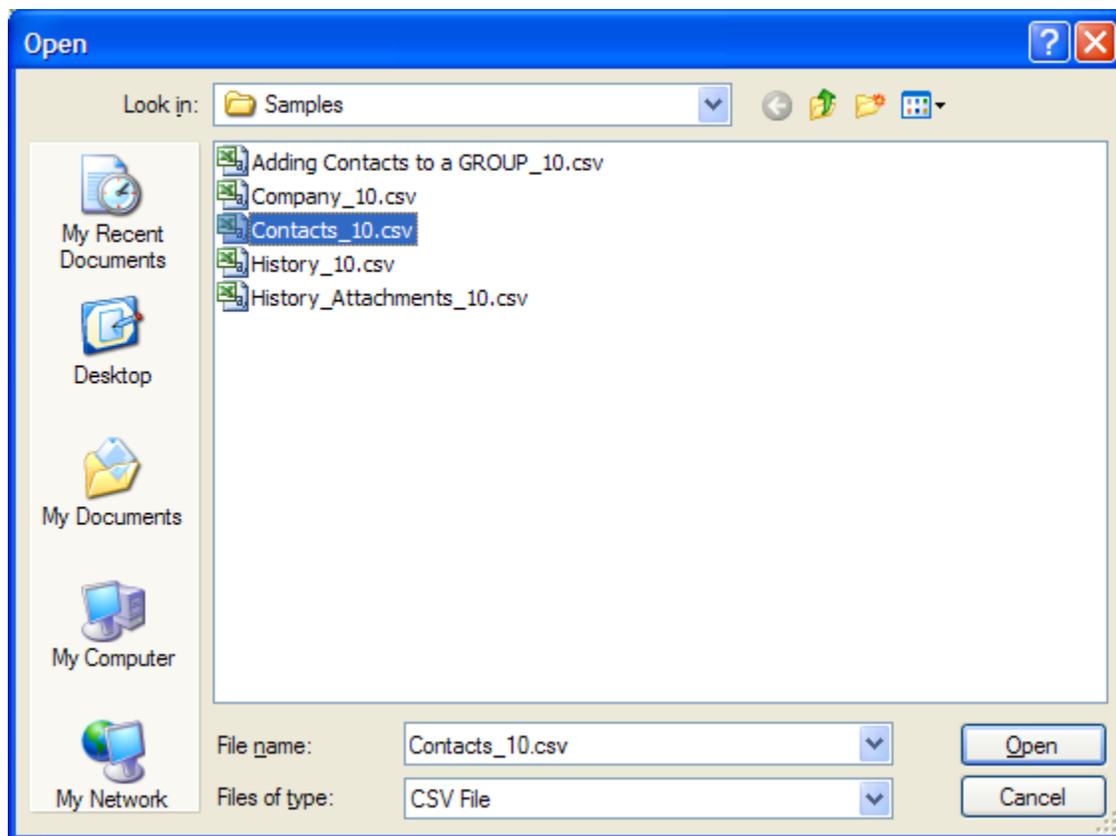


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There are samples included in the Samples folder to test with the **Act!** Demo database.

A typical location for the sample import data files is:

C:\E Tech Systems\ACT\OAK!Merge 21\Samples





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Company	Contact	Phone	Title	Address1	Address2	City	State	ZIP	end
Boomer's Artworx	Emily Dunn	(602) 555-4874	Sales Representative	8907 E. Rosebud Lane	Suite 25	Scottsdale	AZ	85258	end
Boomer's Artworx	Bettie James		Sales Representative	8907 E. Rosebud Lane	Suite 25	Scottsdale	AZ	85258	end
Corleone's Pasta Company	Morty Manicotti	(480) 555-4512	Director of Manufacturing	8800 Pasta Way	Suite 200	Scottsdale	AZ	85258	end
Duke Industries	Nathan Cutting Brittles	310-622-1507		4075 Santa Monica Frwy		Los Angeles	CA	90029	end
Duke Industries	Marion Morrison	310-622-1500	Founder	4075 Santa Monica Frwy		Los Angeles	CA	90029	end
Duke Industries	Kirby York	310-622-1506		4075 Santa Monica Frwy		Los Angeles	CA	90029	end
Duke Industries	Ethan Edwards	310-622-1501		4075 Santa Monica Frwy		Los Angeles	CA	90029	end
Jake Flakes Inc.	Bella Minoal		Consultant	1680 N. Deville Dr.	Suite 40	Tempe	AZ	85281	end
Mad House;The	Greg Hart	(310) 555-2244	President	22 Acacia Ave.		Manhattan Beach	CA	90266	end
Yellow Jersey Bikes	Ashley Allan	(619) 555-8890	VP of Sales	315 Center Dr.	Suite 100	San Diego	CA	92109	end



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Select the Import Source and Merge Destination
Below is a CSV going into an Act! database
If you want to export, then the Source is Act!.

Selecting Import Source and Merge Destination

IMPORT SOURCE	
Type	Delimited File (csv or txt)
File	C:\E Tech Systems\ACT\OAK!Merge 16\Samples\Contacts_10.csv
Delimiter	Comma
	<input checked="" type="checkbox"/> First Row Contains Field Names

MERGE DESTINATION	
Type	ACT!
ACT! PAD File	C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad
User Id	Chris Huffman
Password	



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Step 2 of 4: Select the Source and Destination

Identify the source/ input file, the **Act!** target database, **Act!** user name and password (if necessary), location of the mapping database and the specific data map to use.

FROM: the IMPORT SOURCE

Type Text delimited files are supported in Basic and Standard versions. Excel, ACCESS, and XML are supported in Advanced and Pro versions and **Act!** to **Act!** in the Pro version.

File Specifies the full pathname for the input file containing the data to merge into the target **Act!** database. Click the Browse button to select the input file.

Delimiter Comma or TAB

TO the MERGE DESTINATION

File This is the target **Act!** database. It specifies the full pathname for the **Act!** database to update with data from the input file. Click the Browse button to select the database. The target **Act!** database can be open or closed at the time of the merge.

IF you are exporting, the Destination can be ACT, Delimited, or XML

User ID (Optional for single user databases) Specifies the user name used by **OAK!Merge** to log on to the target **Act!** database. All changes made during this merge are recorded with this user name.

Password (Optional for single user databases) Specifies the password for the user name used to log on to the target **Act!** database.



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TIP: OAK!Merge logs into the database the same as an Act! user. If the user can log into the database without a password, then so can OAK!Merge. Act! may allow blank passwords, depending on the Act! password policy. If a password is used, then OAK!Merge will stop if it is not supplied correctly.

Note, if a database has only one active user, then no login screen is shown/used when logging into ACT. But the Act! user name and a blank password is still required for OAK!Merge.

Click on Next

If you have the Advanced or PRO version you can pick other data types such as MS EXCEL for your input source type. ACCESS and EXCEL 2000 through 2016 are supported. XLS XLSX mdb or accdb or XML

“Type” is a pull down menu

The screenshot shows the 'Selecting Import Source and Merge Destination' dialog box. The 'IMPORT SOURCE' section has a 'Type' dropdown menu with a list of options: ACT!, ACT! Web API, ACT! Essentials, Delimited File (csv or txt), MS Excel 2000-2003 (xls), MS Excel 2007-2016 (xlsx), and MS Access 2000-2003 Database (mdb). The 'MERGE DESTINATION' section has fields for Type (ACT! Web API), URL (http://vmact17/ACT.Web.API), Database (ACT2015Demo), User (Chris Huffman), and Password. The 'LOAD IMPORT RULES (MAPPINGS)' section has a 'Name' field. At the bottom, there are buttons for Support / Tools, Close, Start Over, Next, and Merge.

You do NOT need to have Excel or Access installed to see all the options. On some systems the MDB options will work even if Access is **not** installed. You may need to install a free Microsoft driver installed to see Access options.



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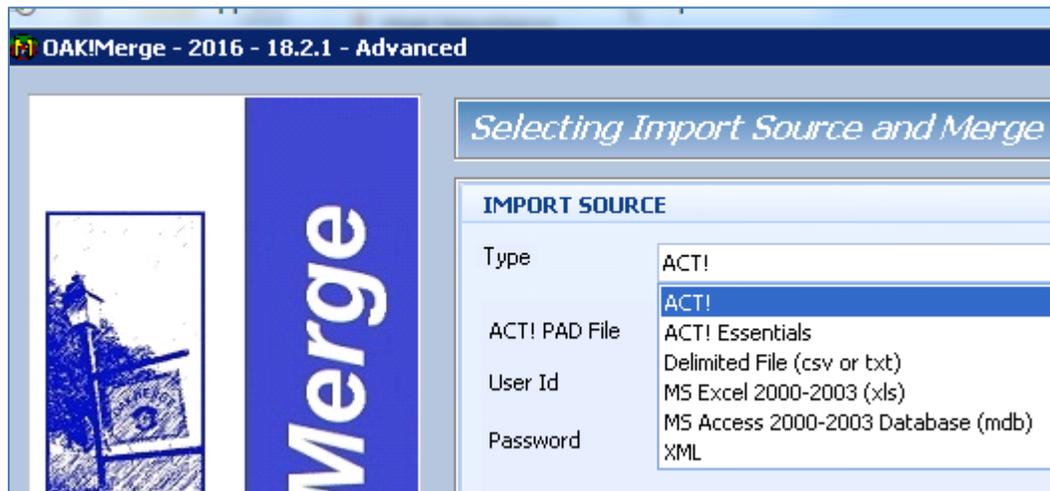


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TIP: OAK!Merge uses the Office System Drivers that are installed on the PC for Access, but not for Excel. IF you have Office installed, but do not see the newer version options you can add the support for Access 2007 to 2016 (accdb) using a update from Microsoft called

"Microsoft Access Database Engine 2010 Redistributable"

What to do if the MDB or ACCDB option is missing



The fix is to install the needed drivers.

Download for Access 2007+ at:

<https://www.microsoft.com/en-us/download/details.aspx?id=13255>

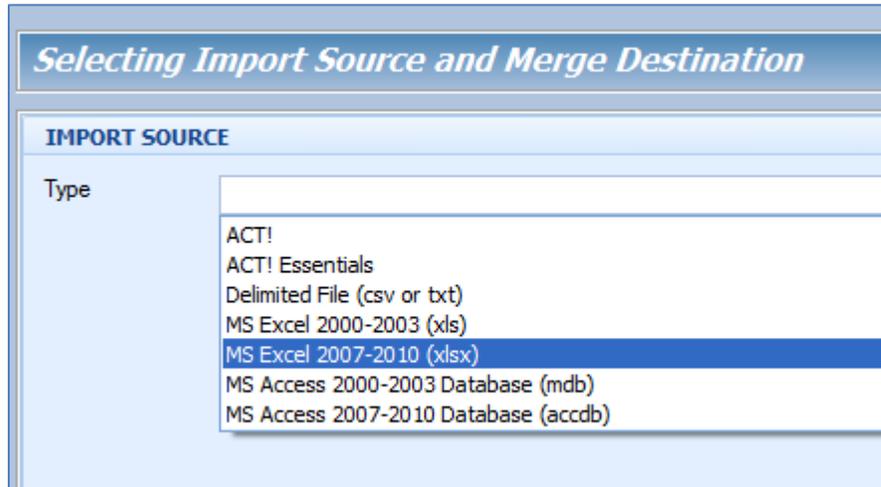
This adds both Access drivers for 2007+



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If you only have Office 2003 installed; use these drivers

Access, Excel 2003 - <https://www.microsoft.com/en-us/download/details.aspx?id=5793>

TIP: OAK!Merge also has **Act!** as a source for Act! To Act! Merges of some of the tables; and for exporting. You can use the COPY UP button to copy the lower panel to the top one so you have Act! the source and destination. You can merge Act! to Act! within the same database or between 2 different ones.

Step 3 of 4: Select Target Table and Map Fields

The Next Screen has the mappings. First select the Target Table (no mappings/fields appear until you select a target table). This is where you need to put the data in Act! You cannot update more one table per merge. You can create a batch file to merge data to several tables in one operation by chaining several predefined merges together. See unattended merges section.

The PRO version displays the tables below as well as any custom tables. The Standard version will only display the 5 tables it supports which are Companies Contacts, Groups, History and Notes.



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The screenshot shows the 'Merge Rules' configuration window. On the left, there are two sections: 'ACT! Table' with a dropdown menu and 'Delimited File (csv or txt) Table' with a table. The table has a header row with 'Merge Source' and a data row with a trash icon. A dropdown menu is open, listing various tables: Groups, Companies, Contacts, History, Notes, Activities, Opportunities, Products, Products for Opportunities, Users, and Secondary Contacts. On the right, there is a red button labeled 'Select a Target Table' with a left-pointing arrow, a 'Unmap All' button, and a checkbox for 'Display Mapped Only'. Below these is a table with columns 'Table Type', 'Required', and 'Transformation Rule', containing the text 'No image d...'. The 'Select a Target Table' button is circled in red.

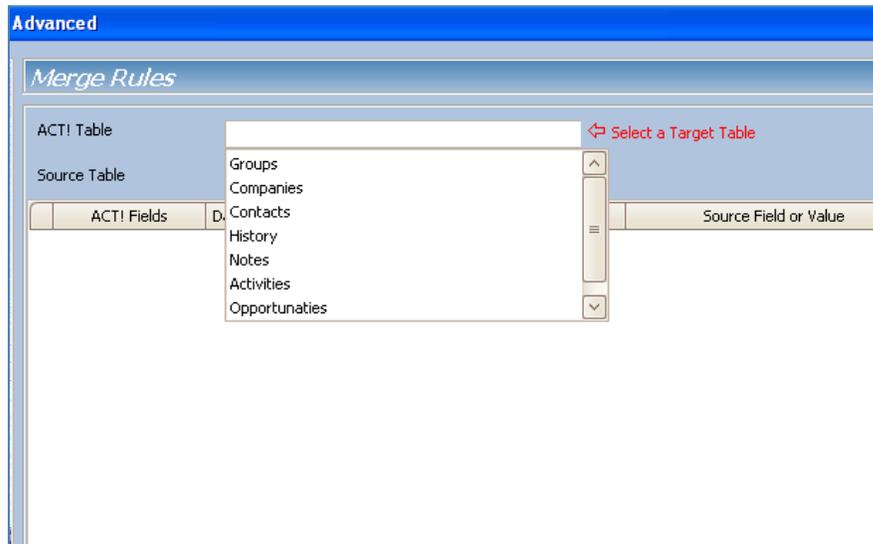


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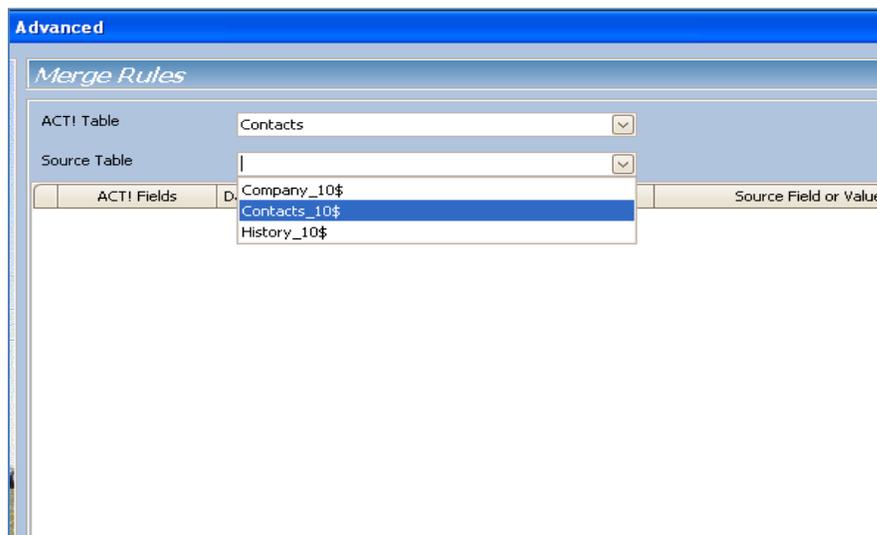


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Different versions show different tables. Advanced version has additional tables: Activities and Opportunities.



In the Advanced or Pro version, you can pick the worksheet name or table/query name to use if you are using Excel or ACCESS as an input source. Only one worksheet or table can be used in any particular merge. XML is also supported.



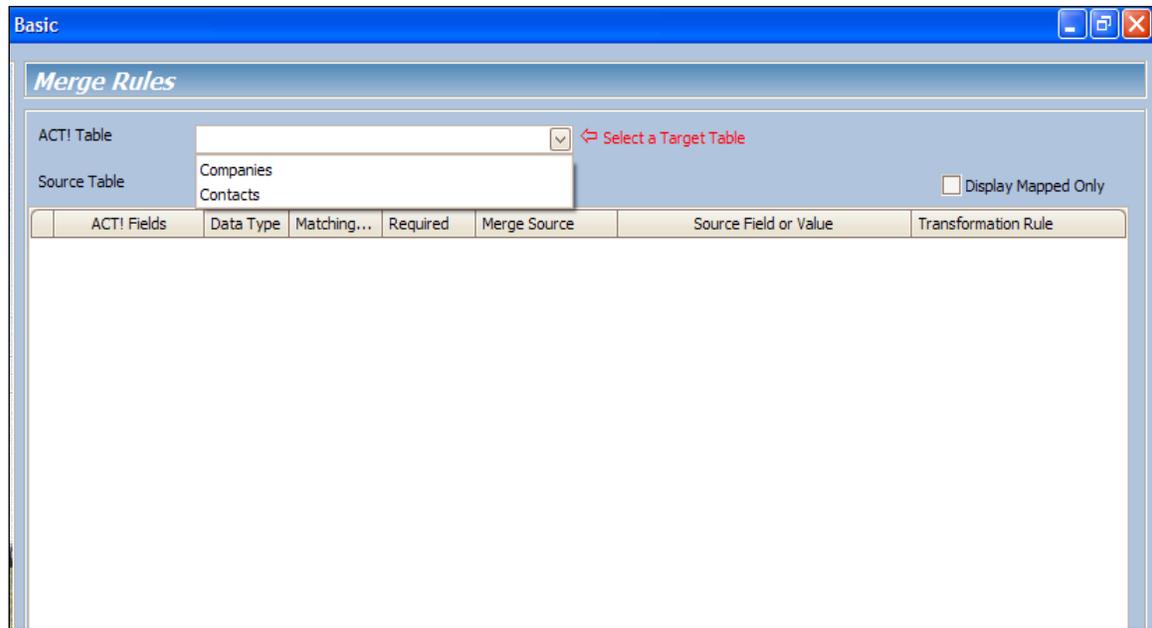


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The BASIC version does not support exporting,
and looks like this:



Does your data have a with the names of the fields? There could be data or field names in row 1.

OAK!Merge always uses the first actual row as the field names, unless you uncheck the box for "First Row Contains Field Names" If your first row is data, then uncheck the box



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IMPORT SOURCE

Type: MS Excel 2000-2003 (xls)

File: [Empty]

First Row Contains Field Names

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: [Empty]

Delimiter: Comma

First Row Contains Field Names

The Standard and above versions add **Act!** as an Import source, so OAK!Merge can EXPORT data to any target.



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Selecting Import Source and Merge Destination

IMPORT SOURCE	
Type	ACT!
ACT! PAD File	C:\Users\Public\Documents\ACT\ACT Data\Databases\FROM_DB_Demo.pad
User Id	
Password	

MERGE DESTINATION	
Type	ACT!
ACT! PAD File	C:\Users\Public\Documents\ACT\ACT Data\Databases\TARGET_ACT2014Demo.pad
User Id	
Password	

Mapping means specifying which field names in the import source are set to write to which field names in **Act!** If the first record contains field names, they can be used to aid the mapping process. The import fields that are named close to the **Act!** field names will automatically map. Those should be checked for proper mapping.

TIP: you can map each source field to multiple fields or no fields in the target.

TIP: The X at the end of the Source Field or Value field is to remove the mapping for that field. This is how you map to "none".

The unmapped fields should be mapped if they need to be updated in the **Act!** database. Fields are not required to be mapped to an **Act!** field.



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Map from Source to Target.

Merge Rules

ACT! Table:

Delimited File (csv or txt) Table:

Display Mapped Only

Merge Source	Source Field or Value	Matchin...	ACT! Fields	Data T...	Required	Transformation Rule
Source Table Column		<input type="checkbox"/>	Name Prefix	String		No Transformation
Source Table Column		<input type="checkbox"/>	First Name	String		No Transformation
Source Table Column		<input type="checkbox"/>	Middle Name	String		No Transformation
Source Table Column		<input type="checkbox"/>	Last Name	String		No Transformation
Source Table Column		<input type="checkbox"/>	Name Suffix	String		No Transformation
Source Table Column		<input type="checkbox"/>	Salutation	String		No Transformation
Source Table Column	Contact	<input checked="" type="checkbox"/>	Contact	String	!	No Transformation
Source Table Column	Company	<input type="checkbox"/>	Company	String		No Transformation
Source Table Column		<input type="checkbox"/>	Department	String		No Transformation
Source Table Column	Title	<input type="checkbox"/>	Title	String		No Transformation
Source Table Column	Address1	<input type="checkbox"/>	Address 1	String		No Transformation
Source Table Column	Address2	<input type="checkbox"/>	Address 2	String		No Transformation
Source Table Column		<input type="checkbox"/>	Address 3	String		No Transformation

EXECUTE OPTIONS

If a Match is Found: If a Match is NOT Found:

[Support / Tools](#)

The Matching checkboxes are the fields used to check to see if a record already exists in **Act!**. The Red ! in the "Required" columns indicate which fields are required (Red) when adding new records. For example: Contact or First Name or Last Name must be mapped if ADDING a contact. However, the data can be blank. A period is inserted as a placeholder. This can be removed later in Act! via an EDIT REPLACE command from the main contact menu.

TIP: if adding contact records with blank contact fields (i.e. no names), you MUST still map the contact field. You can have a blank column in your source.

Below has one field selected for matching



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Merge Source	Source Field or Value	Matching Fields	ACT! Fields	Data ...	Required	Transform
> Source Table Column		<input type="checkbox"/>	Name Prefix	String		No Transf
Source Table Column		<input type="checkbox"/>	First Name	String		No Transf
Source Table Column		<input type="checkbox"/>	Middle Name	String		No Transf
Source Table Column		<input type="checkbox"/>	Last Name	String		No Transf
Source Table Column		<input type="checkbox"/>	Name Suffix	String		No Transf
Source Table Column		<input type="checkbox"/>	Salutation	String		No Transf
Source Table Column	Contact	<input checked="" type="checkbox"/>	Contact	String		No Transf
Source Table Column	Company	<input type="checkbox"/>	Company	String		No Transf
Source Table Column		<input type="checkbox"/>	Department	String		No Transf
Source Table Column	Title	<input type="checkbox"/>	Title	String		No Transf
Source Table Column	Address1	<input type="checkbox"/>	Address 1	String		No Transf

Click on the X after Source Field to clear the mapping for any row that does not need to be mapped. Fields that are not mapped are not updated in Act!

Matching rules: matching is an EXACT match.. This includes case and leading/trailing spaces.

TIP: You pick which fields to match on and how many fields to use.

If you want to loosen up the matching, you need to change the data. You can create a temp field in the source and targets and use that for a matching field. In it you could convert all records to all upper case, and take the first X characters. Often the 1st 15 of an address works well. This matches more than the real address. Or you might combine several fields. This can help when you are working with duplicates or trying to de-dupe.

Test test... >>> you can tighten and loosen the matching to get the best results.



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Merge Source	Source Field or Value	Matching Fields	ACT! Fields	Data ...	Required	Tran
Source Table Column			Name Prefix	String		No T
Source Table Column			First Name	String		No T
Source Table Column			Middle Name	String		No T
Source Table Column			Last Name	String		No T
Source Table Column			Name Suffix	String		No T
Source Table Column			Salutation	String		No T
Source Table Column	Contact	<input checked="" type="checkbox"/>	Contact	String		No T
Source Table Column	Company	<input type="checkbox"/>	Company	String		No T
Source Table Column		<input type="checkbox"/>	Department	String		No T
Source Table Column		<input type="checkbox"/>	Title	String		No T
Source Table Column		<input type="checkbox"/>	Address 1	String		No T
Source Table Column		<input type="checkbox"/>	Address 2	String		No T
Source Table Column		<input type="checkbox"/>	Address 3	String		No T

Checking "Display Mapped Only" shows less rows

Merge Rules

ACT! Table: Contacts

Delimited File (csv or txt) Table: CSV Table

Display Mapped Only

Merge Source	Source Field or Value	Matching Fields	ACT! Fields	Data ...	Required	Transformation Rule
Source Table Column	Contact	<input checked="" type="checkbox"/>	Contact	String		No Transformation
Source Table Column	Company	<input type="checkbox"/>	Company	String		No Transformation
Source Table Column	Title	<input type="checkbox"/>	Title	String		No Transformation
Source Table Column	Address1	<input type="checkbox"/>	Address 1	String		No Transformation
Source Table Column	Address2	<input type="checkbox"/>	Address 2	String		No Transformation
Source Table Column	City	<input type="checkbox"/>	City	String		No Transformation
Source Table Column	ZIP	<input type="checkbox"/>	ZIP Code	String		No Transformation
Source Table Column	State	<input type="checkbox"/>	State	String		No Transformation
Source Table Column	Phone	<input type="checkbox"/>	Phone	String		No Transformation

EXECUTE OPTIONS

If a Match is Found: Update If a Match is NOT Found: Add

Set EXECUTE OPTIONS at the bottom of the screen
If a match IS found, you can UPDATE, SKIP or DELETE the record



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If a match is NOT found, you can ADD or SKIP the record

TIP: This option is a key feature of **OAK!Merge**. You may want to map incoming data differently if it matches or not. That would require 2 separate merges with different execute options and field mappings.

The next to last field in the mappings is "Link To: Group"
Contact records are automatically added to the specified group. The group must exist.

You can add each contact to a different static group or all contacts to the same group.

See example 4 for group assignment sample merge.

Merge Rules

ACT! Table:

Delimited File (csv or txt) Table: Display Mapped Only

Merge Source	Source Field or Value	Matching Fields	ACT! Fields	Data ...	Requ
Source Table Column		<input type="checkbox"/>	User 3	String	
Source Table Column		<input type="checkbox"/>	User 4	String	
Source Table Column		<input type="checkbox"/>	User 5	String	
Source Table Column		<input type="checkbox"/>	User 6	String	
Source Table Column		<input type="checkbox"/>	User 7	String	
Source Table Column		<input type="checkbox"/>	User 8	String	
Source Table Column		<input type="checkbox"/>	User 9	String	
Source Table Column		<input type="checkbox"/>	Record ID (ACT! GUID)	String	
Source Table Column	Company	<input type="checkbox"/>	Link To: Companies by Company Name	String	
Source Table Column		<input type="checkbox"/>	Link To: Companies by ACT! GUID	String	
Source Table Column	end	<input type="checkbox"/>	Link To: Groups by Group Name	String	
Source Table Column		<input type="checkbox"/>	Link To: Groups by ACT! GUID	String	
Source Table Column		<input type="checkbox"/>	Record Manager (Name, Login or GUID)	String	

EXECUTE OPTIONS

If a Match is Found:

If a Match is NOT Found:

LINKING OPTIONS



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Contacts can be linked to existing Company records via the Link to Company by Company name or CompanyID (current Act! GUID of the company). If a custom company field called "OAKMergeID" exists in the database, you will also get the option to Link the Contact to the Company using the OAKMergeID field.

Adding the OAKMergeID field is done via define fields under TOOLS menu. It has to be spelled OAKMergeID with no spaces. Leave the Field data type as Character. Numbers for Field data type does not work.

The screenshot shows the 'Define Fields' web interface. At the top, there are navigation buttons for 'Back', 'Forward', and 'Home'. The main heading is 'Enter field name and type'. Below this, there is a text input field for 'Field name:' containing 'OAKMergeID'. Below that is a dropdown menu for 'Field data type:' set to 'Character'. Underneath is a section titled 'Customize field behavior' with several checkboxes: 'Allow Blank' (checked), 'Generate History' (unchecked), 'Primary Field' (unchecked), and 'Use drop-down list' (unchecked). There is also a dropdown menu for 'Use drop-down list:'.

This gives you the option of using the custom field: OAKMergeID to link info to Companies. If you need to link info to Contacts or Opportunities, you will need a custom field in those tables too.



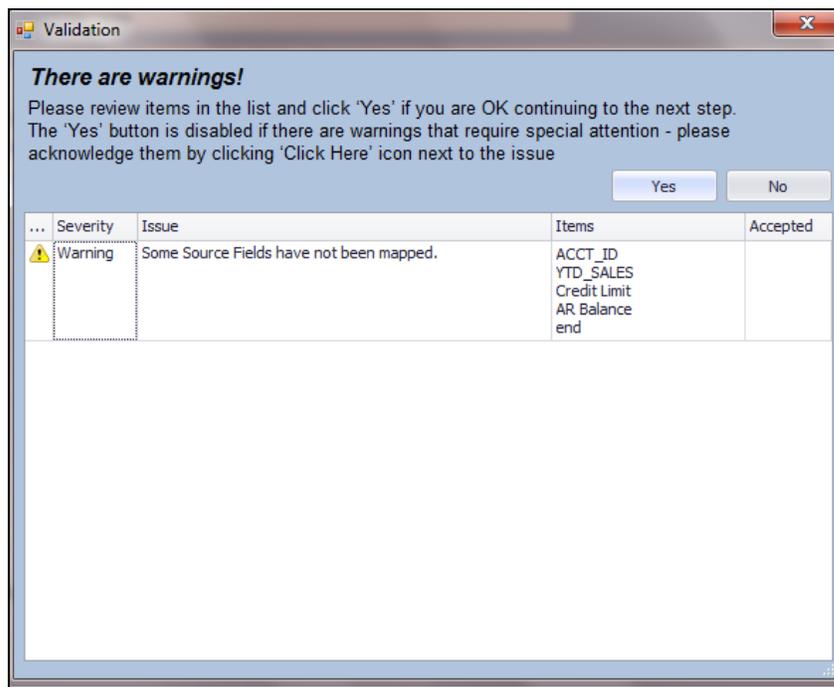
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Merge Source	Source Field or Value	Matching Fields	ACT! Fields	Data ...
Source Table Column	▼ ×	☐	User 4	String
Source Table Column	▼ ×	☐	User 5	String
Source Table Column	▼ ×	☐	User 6	String
Source Table Column	▼ ×	☐	User 7	String
Source Table Column	▼ ×	☐	User 8	String
Source Table Column	▼ ×	☐	User 9	String
Source Table Column	▼ ×	☐	Record ID (ACT! GUID)	String
Source Table Column	▼ ×		Link To: Companies by Company Name	String
Source Table Column	▼ ×		Link To: Companies by ACT! GUID	String
Source Table Column	▼ ×		Link To: Companies by OAKMergeID	String
Source Table Column	▼ ×		Link To: Groups by Group Name	String
Source Table Column	▼ ×		Link To: Groups by ACT! GUID	String
Source Table Column	▼ ×		Record Manager (Name, Login or GUID)	String

A warning in a validation dialog box will appear if some fields are NOT mapped or some are mapped more than once. "Yes" will proceed forward to the final wizard step; and "No" will go back to the mapping. "





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TIP: if you add a new field to Act! with OAK!Merge open, you must Start OAK!Merge over to get the new Act! fields to show up in the mappings area.

Step 4 of 4: Ready to Run

Select Execution Option and Execution Logging level at the top of the screen

Validate / Preview: A test merge for all records, that writes nothing to Act!

Test Run: Partial run; writes only the selected number of records

Complete Run: Complete merge that reads and writes all records

Ready to Run

EXECUTION OPTIONS

Validate only
 Test Run: limited to rows
 Complete Run

Execution Logging Level:

Number of rows to skip:

MAPPING (Contains Field Mapping and Merge Rules)

Name:

Description:

PROFILE (Contains Complete Merge Configuration Including Mapping)

Name:

Description:

MERGE CONFIGURATION

	ACT! Contacts	CSV Table
Merge Options:		
Match Found:	Update	
Match Not Found:	Add	
Matching Fields:	Contact	

TIP: Always review the Match Found and Match Not Found options shown at the bottom carefully. If they are wrong, you will get very different results. You



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may have to scroll to see them.

Number of Rows to SKIP: This is the count of rows that will be skipped from the beginning of the source file. This allows merges to start later on in the source file, not at the first record. It is an optional filter that works on all 3 executions options: Validate /Preview; Test Run, and Complete Run. Leave empty to skip 0 rows

For example if you have 5,000 rows in a CSV. You do a test merge of 100 and then want to run the rest. You need to start on row 101; so you SKIP 100 rows.

TIP: Excel puts a header at the top, so the row numbers are one more than the counts. If Jack Smith in on ROW 227 in excel and you want to start with him as the first row to process, would SKIP 225 rows

Note: the number of rows reported in the results page counts for "Skipped" is for those that were processed, and does not include these rows skipped at the beginning.

TIP: This feature allows you to run test merges of a few records that do not start with the first row. For example, you could run 3 tests of 25 records each, but each test starting at different points in the source file.

Click the run button to execute the merge.



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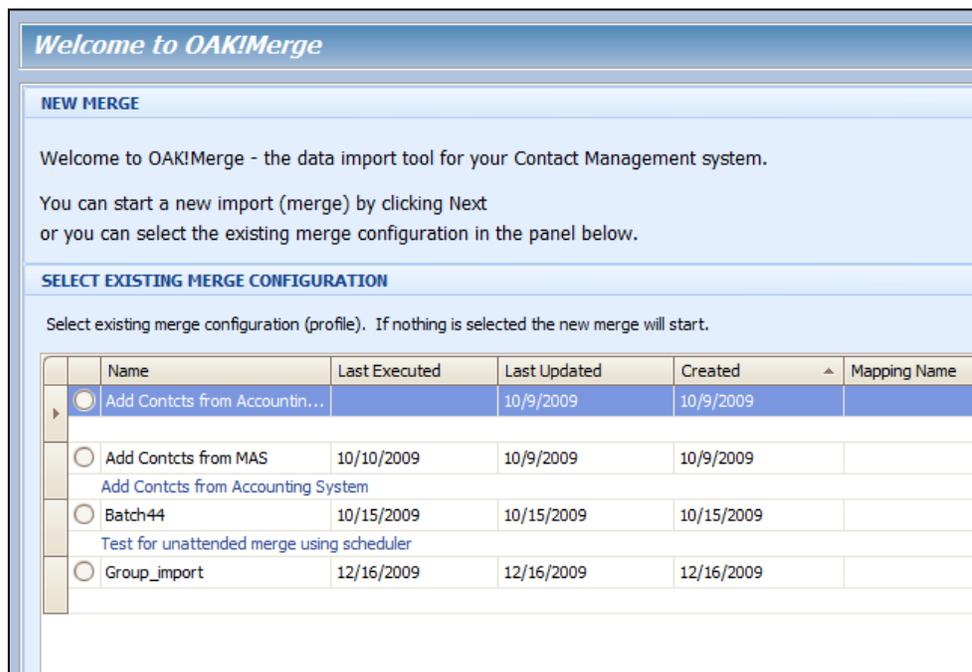
Optional: Save Mapping and Profile information

Profile Information Specifies the full pathname for the import file and target database for this merge, plus the user name and password, if specified. Click the SAVE button to name the profile. After you save a profile, it will display when you start **OAK!Merge**. Save and using Profiles requires the Standard version or higher.

Mappings Information Specifies the full pathname for saving the mappings for this merge.

Note: Basic and Standard versions do not support Profiles, but do allow saving the mappings.

Saved profiles can also be used to run a merge from a scheduler or clickable link/batch file. The Advanced version is required for the unattended merges feature. Profiles are listed on the first screen when OAK!Merge starts. Saved profiles look like this:





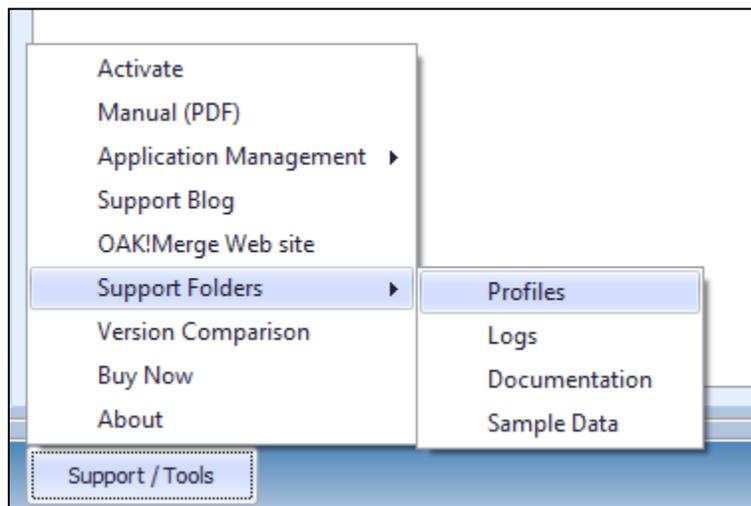
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Profiles are stored in the Profiles Folder in the OAK!Merge installation directory. They can be renamed, edited, or deleted there. They are in XML, so editing them in notepad or with an XML editor is for advanced users.

TIP: : an easy way to delete unneeded profiles it to click on Tools/Support button and select Support Folders, then Profiles. You can right mouse click on any profile in the files list to rename or delete it.



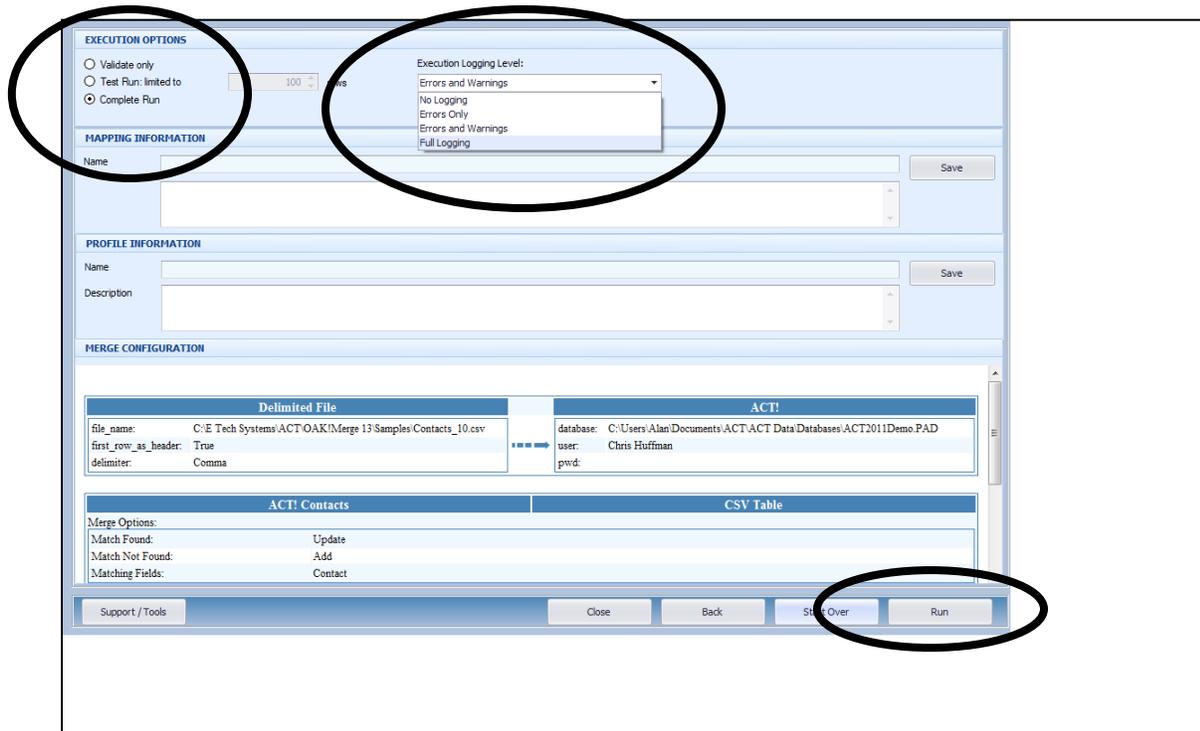


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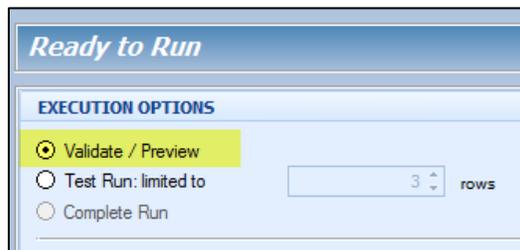
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Logging Level is set here. Select Full logging for testing and debugging, but not for normal merges. Full logging slows down the merge and can produce large files.



Click RUN to perform the merge

TIP: When you select Validate / Preview, Act! is NOT updated! It is to preview what will happen if you do a full merge and is useful for error checking the source file to see how many records would be skipped as a dup, deleted, added, or updated.



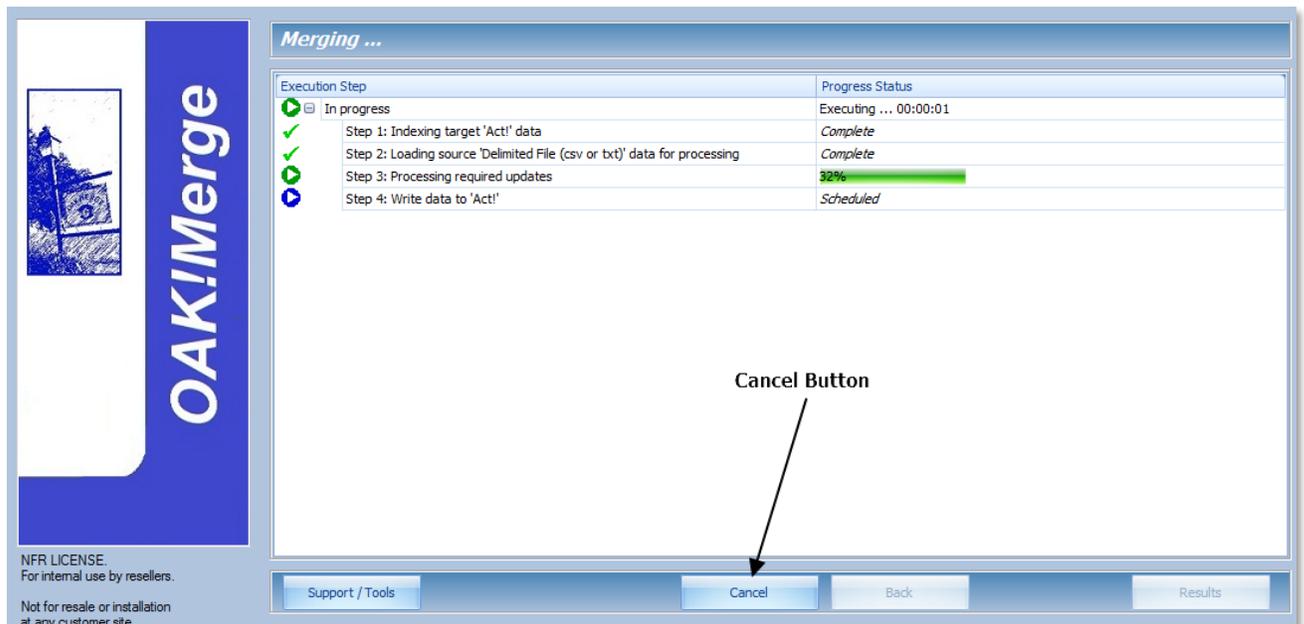


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Progress bars and timers show the progress of the merge. Most, but not all, of the steps can be interrupted when they are running. A few, such as Loading Act! Data as a source to export, will finish an operation or complete the current step if the merge is cancelled.

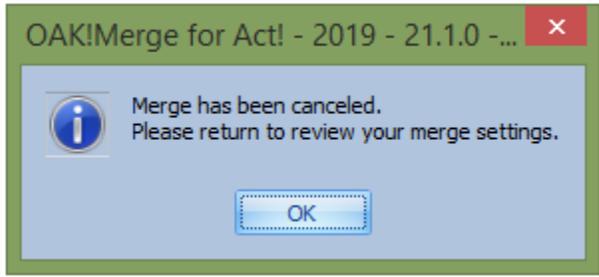




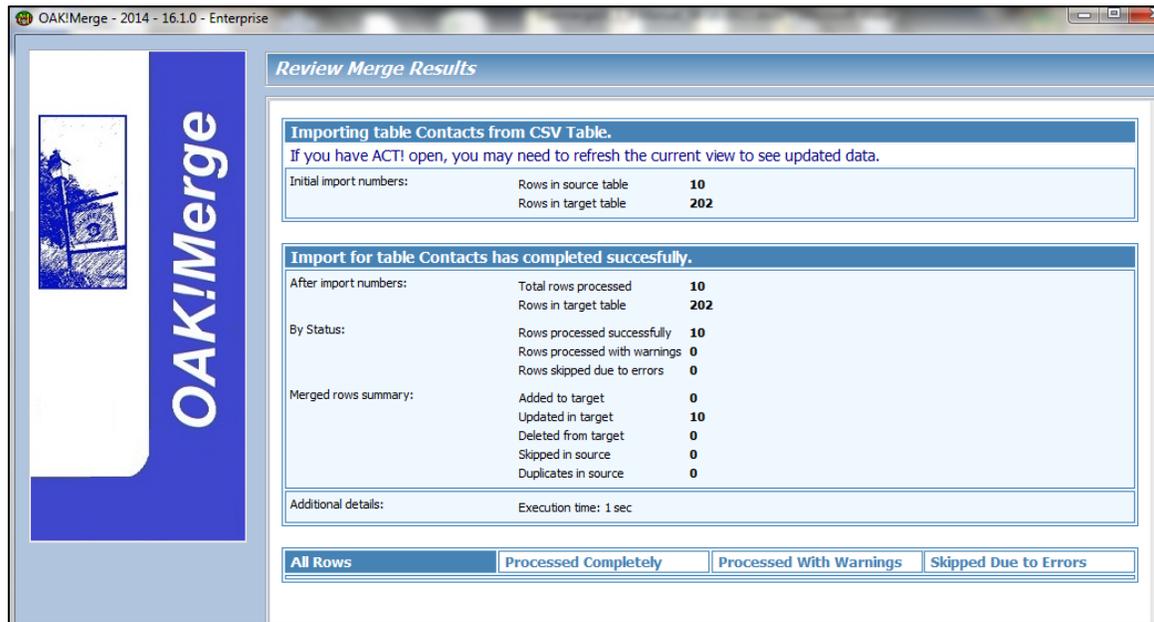
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The Review Merge Results page appears next.



Additional Details contains elapsed time. This time includes days if a merge goes beyond 24hrs.

Information in the Tabs at the bottom of the screen is controlled by the logging level set on the Ready to Run page. Select Full Logging for the most info.



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Ready to Run

EXECUTION OPTIONS

Validate / Preview
 Test Run: limited to rows
 Complete Run

Execution Logging Level:
 Errors and Warnings
No Logging
 Errors Only
 Errors and Warnings
 Errors, Warnings and Skipped Records
 Records skipped due to merge rules
 Records deleted due to merge rules
 Only appended records
 Only updated records
 Records processed successfully (appended, updated or deleted)
 Full Logging

Number of rows to skip:

MAPPING (Contains Field Mapping and Merge Rules)

Name:

Description:

Import for table Contacts has completed successfully.

After import numbers:	Total rows processed	10
	Rows in target table	202
By Status:	Rows processed successfully	10
	Rows processed with warnings	0
	Rows skipped due to errors	0
Merged rows summary:	Added to target	0
	Updated in target	10
	Deleted from target	0
	Skipped in source	0
	Duplicates in source	0

Additional details: Execution time: 1 sec

All Rows	Processed Completely	Processed With Warnings	Skipped
- Record 1 was merged.			
Row: Contact: Emily Dunn			
- Record 2 was merged.			
Row: Contact: Bettie James			
- Record 3 was merged.			
Row: Contact: Morty Mancotti			
- Record 4 was merged.			
Row: Contact: Nathan Cutting Brittles			

The tabs on the results screen give different views. The +/- on the left will expand/collapse the rows. They are all expanded by default to allow quick visual scans.

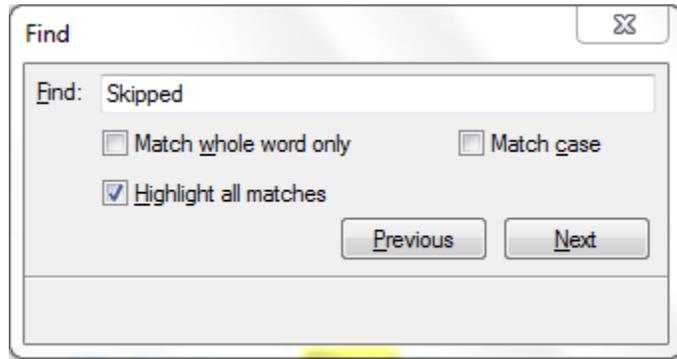


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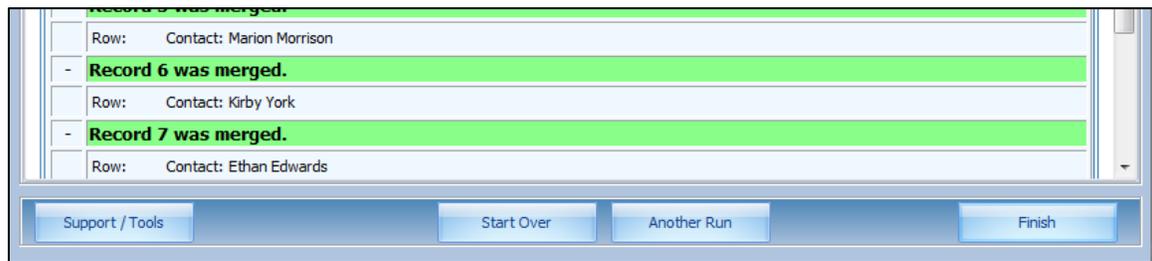


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TIP: use a CTRL-F to FIND info you need in a long list, such as Skipped.



Next, Next, Next... walks you through the list.



However, using the logging level of Errors, Warnings, and Skipped will get you pretty close. It does not have the merged records, only the skipped; plus any errors or warnings

Start Over clears all the settings and starts a new merge.

Another run will go back one screen to the Ready to Run screen. You can then use the "Merge rules" button to adjust the current mappings.

Finish will exit the program.

TIP: When checking Act! for changes, you may need to VIEW, REFRESH (or F5) to refresh the information displayed by Act! in order to see the updated information.

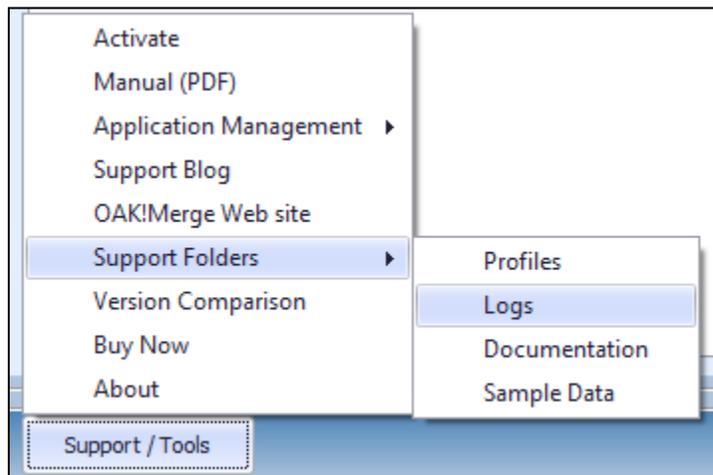


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Information from each merge is stored in the logs folder. The information in the results page is stored in a file ending in .htm and can be reviewed later. See the logs file info in Appendix 1 for how to find records skipped, added, deleted, or merged



You can double click on them to see the results page of previous merges.

More information is in Appendix 1 on Logs.

There are also the detailed logs ending in XML that have the details of the merge. You can open and review them to see details of a merge operation.

TIP: You can open the XML log with Excel to see which rows were Added, Merged, or Skipped. Look in column M or Subject.

	Level	LevelNumeric	LevelClass	Category	Subject	Details
19	Information	11	Information	Merge Execution	Record 18 was merged.	#####
20	Information	11	Information	Merge Execution	Record 19 was merged.	#####
21	Information	11	Information	Merge Execution	Record 20 was merged.	#####
22	Information	11	Information	Merge Execution	Record 21 was added.	#####
23	Information	11	Information	Merge Execution	Record 22 was added.	#####
24	Information	11	Information	Merge Execution	Record 23 was added.	#####
25	Information	11	Information	Merge Execution	Record 24 was added.	#####



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	Level	LevelNumeri	LevelClass	Category	Subject	Details	xml	Column1
19	Information	11	Information	Merge Execution	Record	18	was	merged.
20	Information	11	Information	Merge Execution	Record	19	was	merged.
21	Information	11	Information	Merge Execution	Record	20	was	merged.
22	Information	11	Information	Merge Execution	Record	21	was	added.
23	Information	11	Information	Merge Execution	Record	22	was	added.
24	Information	11	Information	Merge Execution	Record	23	was	added.

Section 3: Examples of Other Merges

Example 2: Merge to History

You can **ADD** or **DELETE** info to the History tab in Act! You cannot **UPDATE** it. You **ADD** the history and link it other objects: **Contacts, Companies, Opportunities, or Groups**. See the index for the example for **Deleting History or Notes**

Use the History files in the **Samples** folder to try these merges with the **Act! demo database**

There is an important difference in History for a **TYPE** and a **RESULT**. The **TYPE** used as a filter in Act! to limit the choices; but only the **RESULT** is stored in the database. So the Result of "Call Completed" is stored, not the **TYPE** of "Call"

You schedule an activity by picking a **TYPE**, but to get it into history, you must select a **RESULT**

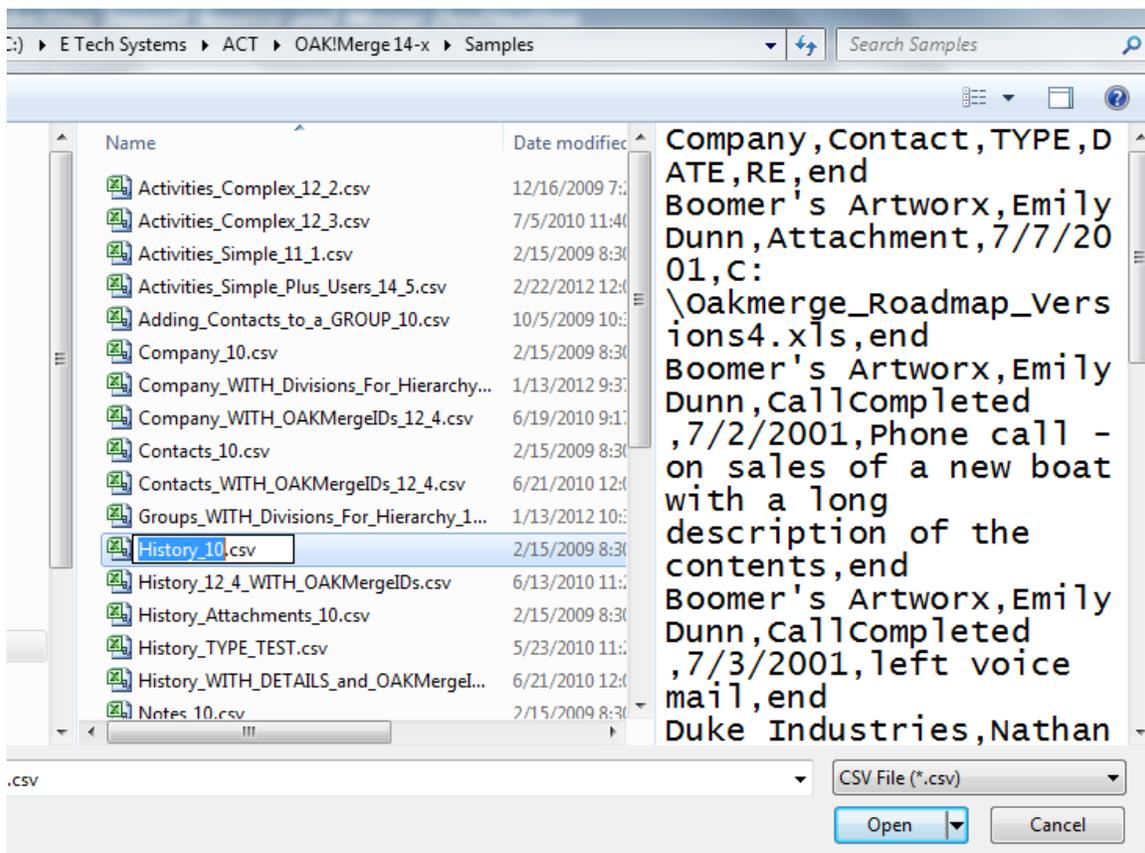
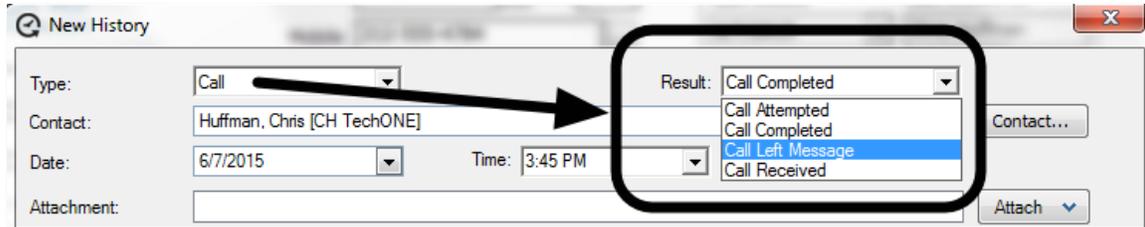
KEY POINT: When Adding History you have to specify the **RESULTS**, not a **TYPE**



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Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 15\Samples\History_10.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

Password:

Pick the target table: History

Merge Rules

ACT! Table: History

Delimited File (csv or txt) Table: History

Merge Source:

History
Groups
Companies
Contacts
History
Notes
Activities
Opportunities

MAP at least: Type, Start Time (this is the date or date/time) , and Regarding fields; then LINK to the Contact and/or Company and/or Opportunity.

TIP: You do not need to link to BOTH the contact and company. Contact histories rollup to the company automatically when viewed in



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Act!

Merge Rules

ACT! Table: History

Delimited File (csv or txt) Table: CSV Table Display Mapped Only Unmap All

Merge Source	Delimited File (csv or txt) (source) Field or Value	ACT! (target) Fields	Data Type	Required	Transformation Rule
> Source Table Column	Contact	Link To: Contacts by Full Contact Name	String		No Transformation
Source Table Column	TYPE	History Type (Result)	String	!	No Transformation
Source Table Column	RE	Regarding	String		No Transformation
Source Table Column	DATE	Start Time	DateTime	!	No Transformation

TIP: Use the X after Source Field in the mapping to remove any auto mapped fields that are not needed.

Other optional fields include setting the record manager for the history or adding note info into the details field.

Merge Rules

ACT! Table: History

Delimited File (csv or txt) Table: CSV Table Unmap All

Display Mapped Only

Merge Source	Source Field or Value	ACT! Fields	Data Type	Required	T
> Source Table Column		Link To: Opportunities by Opportunity Name	String		
Source Table Column		Link To: Opportunities by ACT! GUID	String		
Source Table Column		Link To: Groups by Group Name	String		
Source Table Column		Link To: Groups by ACT! GUID	String		
Source Table Column		Record Manager (Name, Login or GUID)	String		
Source Table Column	TYPE	History Type	String	!	...
Source Table Column	RE	Regarding	String	!	...
Source Table Column		Details	String		...
Source Table Column	DATE	Start Time	DateTime	!	...
Source Table Column		End Time	DateTime		...
Source Table Column		Attachment Description	String		...
Source Table Column		Attachment File Name	String		...
Source Table Column		Record ID (ACT! GUID)	String		...

EXECUTE OPTIONS

If a Match is Found: Add

If a Match is NOT Found: Add



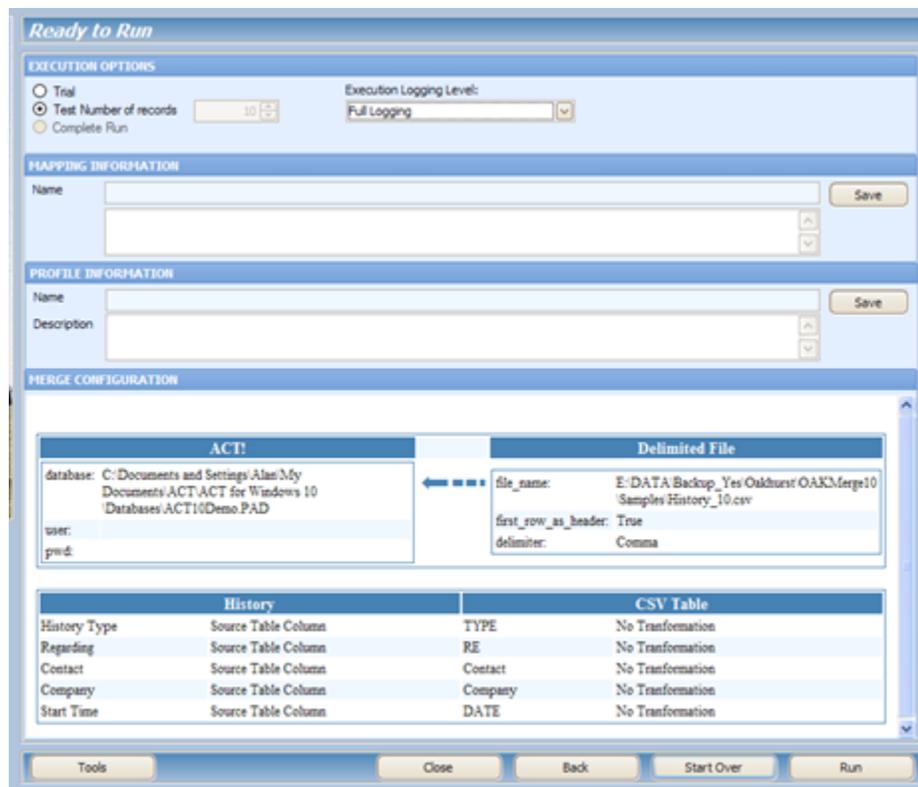
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Note that there is no “Matching Fields” column. History is an append only table. (so is Notes and Activities). The Update/Skip execute options at the bottom of the mapping screen are grayed out (inactive).

Pick the Execute option and run it.



You must use the standard words for history types. Use the Results codes.



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Most history types that are not supported by **Act!** in a merge will come in as a To_Do Done. There are few Act! rejects and will skip that row. See the next list for a few know ones that do not import.

Know good Result Types for History

Access	Marketing Call Completed
Access Changed	Marketing Call Not Completed
Activity Deleted	Meeting Held
Activity Updated	Meeting Not Held
Appointment Completed	New Opportunity
Appointment Erased	Opportunity Inactive
Appointment Not Completed	Opportunity Lost
Attachment	Opportunity Opened
Call Attempted	Opportunity Stage Update
Call Completed	Opportunity Won
Call Left Message	Personal Activity Cancelled
Call Received	Personal Activity Completed
Contact Deleted	Personal Activity Not Completed
Contact Linked	Personal Activity Postponed
Contact Unlinked	Quote
Contact Updated	Received Sync
Data Moved	Replace Fields Log
E-mail Attachment	Sent Sync
E-mail Auto Attached	Timer
E-mail Not Sent	To-do Done
E-mail Sent	To-do Not Done
Error	Vacation Cancelled
Fax Not Sent	Vacation Completed
Fax Sent	Vacation Not Completed
Field Changed	Library Document*
Letter Sent	

***Library Document results require a File Path**



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History Types/Results Know not to work "as-is" are listed below. They will be converted to a type of "To-Done" and added

- Call
- Meeting
- Todo
- Call Erased
- Meeting Erased
- Personal Activity Erased
- Vacation Erased
- To-do Erased
- Erased
- Library Document Attached

Any other unknown Type/Result code is converted to a "To-Do Done"

The sample file History_10.csv used above has 1 error to demonstrate errors. Click on the errors tab to see it. The regarding field cannot be blank. See the tip below on how to fill it in, during an import.

Review Merge Results

Importing table History from CSV Table.
If you have ACT! open, you may need to refresh the current view to see updated data.

Initial import numbers:	Rows in source table	10
	Rows in target table	0

Import for table History has completed with errors.

After import numbers:	Total rows processed	10
	Rows in target table	9
By Status:	Rows processed successfully	9
	Rows processed with warnings	0
	Rows skipped due to errors	1
Merged rows summary:	Added to target	9
	Updated in target	0
	Deleted from target	0
	Skipped in source	0
	Duplicates in source	0

Additional details: Execution time: 1 sec

All Rows | Processed Completely | Processed With Warnings | **Skipped Due to Errors**

- Record 8 could not be merged due to errors.

Issues: History Type (Result): Source value for required target field is empty (blank).(The source value is coming from column [TYPE].)



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TIP: If you have blanks in some regarding fields, you can add a character such as a period in the source file before you import it; OR use a transformation (Substitute a . for an entire field that is blank) to substitute a "." for any blank regarding fields.

Merge Rules

ACT! Table: History

Delimited File (csv or txt) Table: CSV Table Display Mapped Only

Merge Source	Delimited File (csv or txt) (source) Field or Value	ACT! (target) Fields	Data Type	Required	Transformation Rule
Source Table Column	Contact	Link To: Contacts by Full Contact Name	String		No Transformation
Source Table Column	TYPE	History Type (Result)	String	!	No Transformation
Source Table Column	RE	Regarding	String	!	No Transformation
Source Table Column	DATE	Start Time	DateTime	!	No Transformation

- No Transformation
- Upper Case (ALL CAPS)
- Lower Case (all lower case)
- Proper Case (Initial Caps)
- Trim (removes leading and trailing spaces)
- Substitute a . for an entire field that is blank
- Substitute a ~~~ for an entire field that is blank



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Another example.

The screenshot shows the 'Merge Rules' configuration window. At the top, 'ACT! Table' is set to 'History' and 'Delimited File (csv or txt) Table' is set to 'CSV Table'. Below this is a table with the following columns: Merge Source, Source Field, ACT! Fields, Data Type, and Transformation Rule. The table contains several rows, including 'Contact', 'History Type', and 'Regarding'. A dropdown menu is open for the 'Transformation Rule' column of the 'History Type' row, showing options such as 'No Transformation', 'Upper Case (ALL CAPS)', 'Lower Case (all lower case)', 'Proper Case (Initial Caps)', 'Trim (removes leading and trailing spaces)', 'Substitute a . for an entire field that is blank', and 'Substitute a ~~~~ for an entire field that is blank'. Below the table, there are 'EXECUTE OPTIONS' for 'If a Match is Found' and 'If a Match is NOT Found', each with an 'Add' button.

TIP: When linking History, Notes, or Activities; you link them to the CONTACT; you do not need to link them to the company too. If you view a company in Act! where the contacts have been linked to the company; you will see a rollup of the contact history.

Linking history to Companies is only needed if you want the history at the company level only.



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Example 3: Merging Attachments, Shortcuts, and URL Links into History Tab or Documents Tab

Merging Attachments, Shortcuts, and URL Links is an option with adding history, notes, or activities. The difference is slightly different mapping. You can create attachments or links to external attachments. Review the sample file.

OAK!Merge can attach photos/image files but it cannot update picture fields.

You can create attachments or links to external attachments, URLs, or folders. There are 6 possible methods: 6 options on 2 different tabs: History and Documents

History Tab: .

New History

Other Result: Attachment

Lee, Alan [e Tech Systems, Inc.] Contact...

11/8/2017 Time: 10:34 AM Duration: 15 minutes

Attach

File...
Shortcut...

Alan Lee

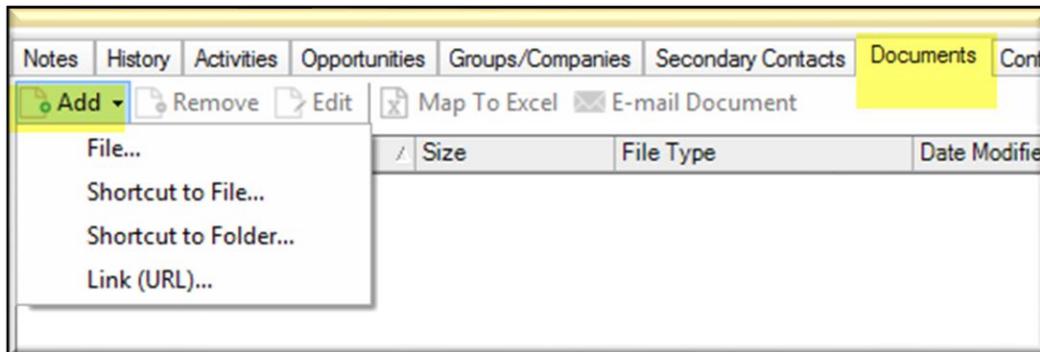


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Documents Tab: .



Example:

When adding Attachments to the History Tab: Set the History Type to "Attachment". See the sample attachments file in the Samples folder

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 15\Samples\History_Attachments_10.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

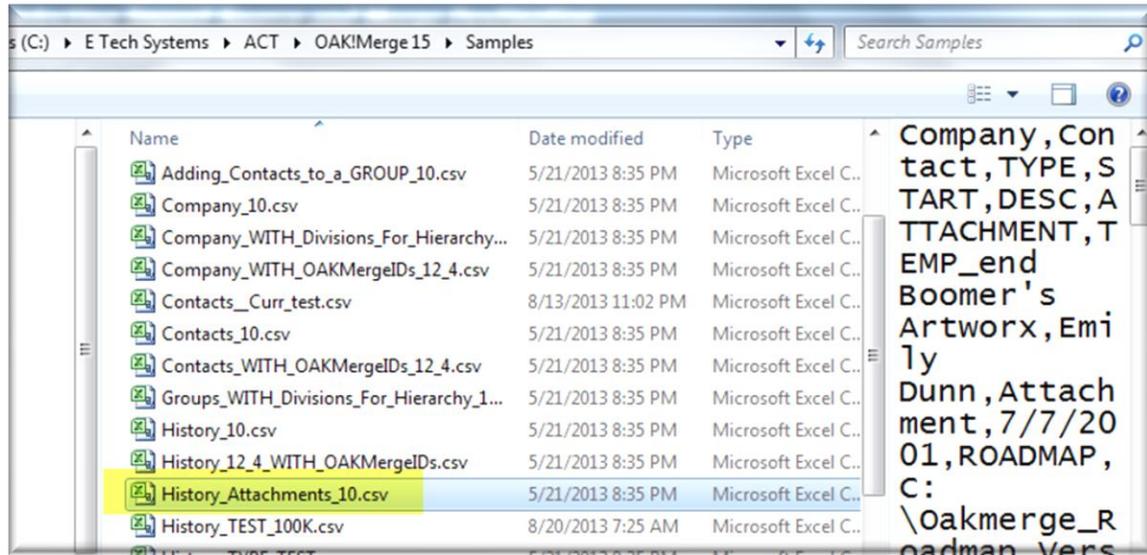
Password:



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Older example is History_Attachments_10.csv. See v20 for newer examples

Company	Contact	TYPE	STARTDATE	DESC	ATTACHMENT
					C:\Program Files\OakHurst\OakM
Boomer's Artworx	Emily Dunn	Attachment	7/7/2001	ROADMAP	Act!\Documents\Samples\History
Boomer's Artworx	Emily Dunn	Attachment	7/2/2001	Attachment	C:\Program Files\OakHurst\OakM
Boomer's Artworx	Emily Dunn	Attachment	7/3/2001		Act!\Documents\Samples\History
Duke Industries	Brittles	Attachment	7/4/2001	Attachment	C:\Program Files\OakHurst\OakM
Duke Industries	Brittles	Attachment	7/5/2001	Attachment	Act!\Documents\Samples\History
Duke Industries	Brittles	Attachment	7/6/2001	Attachment	C:\Program Files\OakHurst\OakM
Duke Industries	Brittles	Attachment	7/7/2001	Attachment	Act!\Documents\Samples\History
Jake Flakes Inc.	Bella Minoal	Attachment	7/8/2001	Attachment	C:\Program Files\OakHurst\OakM
Mad House;The Yellow Jersey Bikes	Greg Hart	Attachment	7/9/2001	Attachment	Act!\Documents\Samples\History
	Ashley Allan	Attachment	7/10/2001	Attachment	C:\Program Files\OakHurst\OakM



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Merge Rules

ACT! Table: History

Delimited File (csv or txt) Table: CSV Table

Unmap All

Display Mapped Columns

Merge Source	Source Field or Value	ACT! Fields	Data Type	Requi...	Transformat
> Source Table Column	Contact	Link To: Contacts by Full Contact Name	String		No Transfor
Source Table Column	TYPE	History Type	String	⚠	No Transfor
Constant Value	Attachment	Regarding	String	⚠	No Transfor
Source Table Column	START	Start Time	DateTime	⚠	No Transfor
Source Table Column	DESC	Attachment Description	String		No Transfor
Source Table Column	ATTACHMENT	Attachment File Name	String		No Transfor

Note that the Regarding has been set to "Attachment" as a constant variable to enhance the user experience. Regarding is required, so it has to be in the import file with data or set via a Constant Value or use the transformation to add a period "." if it is blank. It could have been any value in a field in the import table.

The history is linked to the contact by Full Name. The "Link to Contact using OAKMergeID" would be available here only if a custom field called OAKMergeID exist in the Contact. You cannot use BOTH "Link to the Contact by Full Name" AND "Link to Contact using OAKMergeID."



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Ready to Run Screen

OAK!Merge Wizard - 13.3.2 - Enterprise

Ready to Run

EXECUTION OPTIONS

Validate only
 Test Run: limited to rows
 Complete Run

Execution Logging Level:

MAPPING INFORMATION

Name:

PROFILE INFORMATION

Name:

Description:

MERGE CONFIGURATION

Delimited File		ACT!
file_name: E:\Samples\History_Attachments_10.csv	↓	database: C:\Users\Alan\Documents\ACT\ACT Data\Databases\ACT
first_row_as_header: True	→	user: chris huffman
delimiter: Comma		pwd:

ACT! History	CSV Table
Merge Options:	
Add-only mode: all source rows will be appended to the target table	
Link To: Contact by Full Name	Source Table Column: Contact No Transformation
Link To: Company by Name	Source Table Column: Company No Transformation
History Type	Source Table Column: TYPE No Transformation
Regarding	Constant Value: Attachment No Transformation
Start Time	Source Table Column: START No Transformation
Attachment Description	Source Table Column: DESC No Transformation
Attachment File Name	Source Table Column: ATTACHMENT No Transformation



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Results

Review Merge Results

Importing table History from CSV Table.

If you have ACT! open, you may need to refresh the current view to see up

Initial import numbers:	Rows in source table	10
	Rows in target table	0

Import for table History has completed successfully.

After import numbers:	Total rows processed	10
	Rows in target table	10
By Status:	Rows processed successfully	10
	Rows processed with warnings	0
	Rows skipped due to errors	0
Merged rows summary:	Added to target	10
	Updated in target	0
	Deleted from target	0
	Skipped in source	0
	Duplicates in source	0

Additional details: Execution time: 1 sec

	All Rows	Processed Completely	Processed
-	Record 1 was added.		
-	Record 2 was added.		

Documents TAB imports are only slightly different than to the History Tab. They both are stored in the History table.

To import files to the Documents tab, you must use a Type/Result of "" and map the "Attachment File Name path " field.

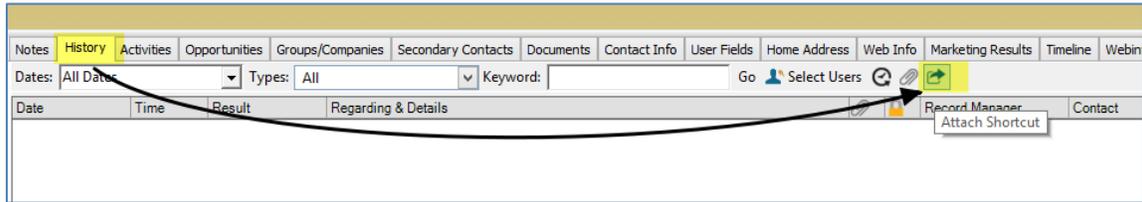


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To add attachments as Shortcuts: Set the field Attachment Shortcut to TRUE.



See the test file show below. It is in the samples folder in the OAK!Merge install directory.

RECORD_ID	CONTACT_NAME	REGARDING	START_TIME	END_TIME	ATTACHMENT_NAME	ATTACHMENT_FILENAME	ATTACHMENT_SHORTCUT	RECORD_ID
1	Wilhelm Loke	Quote # 2009	4/23/2014 14:06	4/23/2014 14:06	Quote-4232009126-Wilhelm Loke.DC	C:\Users\Public\Documents	FALSE	58651552-0
2	Wilhelm Loke	untitled-1.jpg	4/14/2016 18:17	4/14/2016 18:17	untitled-1.jpg	C:\Users\Public\Documents	FALSE	66e61693-6
3	Lance Parker	TEST URL	4/14/2016 18:15	4/14/2016 18:15	http://www.Google.com	C:\Users\Public\Documents	TRUE	12cf7254-0
4	Lance Parker	Test URL2	4/14/2016 18:16	4/14/2016 18:16	http://www.Google.com	C:\Users\Public\Documents	TRUE	744ab336-6
5	Lance Parker	SFDMK_RUNTIME_Image 001.jpg	4/14/2016 18:14	4/14/2016 18:14	SFDMK_RUNTIME_Image 001.jpg	C:\Users\Public\Documents	FALSE	3abb6f2-6
6	Lance Parker	GoogleTip for Phones.rtf	4/27/2014 21:42	4/27/2014 21:42	GoogleTip for Phones.rtf	C:\Users\Public\Documents	FALSE	326ef9b5-6

Above expanded:

N	O	P	Q	R	S
START_TIME	END_TIME	ATTACHMENT_NAME	ATTACHMENT_FILENAME	ATTACHMENT_SHORTCUT	_REC
4/14/2016 18:20	4/14/2016 18:20	D:\Media\act-pro-170-us_ca_la.exe	C:\Users\Public\Documents	TRUE	58651
4/23/2014 14:06	4/23/2014 14:06	Quote-4232009126-Wilhelm Loke.DC	C:\Users\Public\Documents	FALSE	6eb5b
4/14/2016 18:17	4/14/2016 18:17	untitled-1.jpg	C:\Users\Public\Documents	FALSE	f38646
4/14/2016 18:15	4/14/2016 18:15	http://www.Google.com	C:\Users\Public\Documents	TRUE	66e1693
4/14/2016 18:16	4/14/2016 18:16	http://www.Google.com	C:\Users\Public\Documents	TRUE	12cf72
4/14/2016 18:14	4/14/2016 18:14	SFDMK_RUNTIME_Image 001.jpg	C:\Users\Public\Documents	FALSE	744ab
4/27/2014 21:42	4/27/2014 21:42	GoogleTip for Phones.rtf	C:\Users\Public\Documents	FALSE	3abb6f2
				FALSE	326ef

Above shows setting the Attachment_Shortcut field to TRUE if it is a Shortcut. Put the path to the actual file or .lnk file in Attachment_FileName field. Attachment_Name is maps to the Regarding Field

In Act! History you see:



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Activities	Opportunities	History	Notes	Documents	Groups/Companies	Secondary Contacts	Relationships	Social Updates	Web Info	Personal Info	Contact Access
Dates: All Dates Types: All Keyword: Go Select Users											
Id	Time	Result	Regarding & Details		Record Manager	Contact	Share With				
4/2016	6:20 PM	Attachment	D:\Media\act-pro-170-us_ca_la.exe		Chris Huffman	Wilhelm Loke	Yellow Jersey Bikes...				
4/2016	6:17 PM	Attachment	untitled-1.jpg		Chris Huffman	Wilhelm Loke	Yellow Jersey Bikes...				
5/2014	10:00 AM	Opportunity Stage Update	YJBikes Texas Operations - CTH1 Sales: Presentation 40%		Chris Huffman	+Ethan Campbell	Yellow Jersey Bikes [CMP]; YJBikes-Texas...				

The Attachment_Filename is displayed only in the full dialog box view.

The 'Edit History' dialog box displays the following information:

- Type: Other
- Result: Quote
- Contact: Loke, Wilhelm [Yellow Jersey Bikes]
- Date: 4/23/2014
- Time: 2:06 PM
- Duration: 0 minutes
- Attachment: Quote-4232009126-Wilhelm Loke.DOC
- Share With: Yellow Jersey Bikes [CMP]
- Record Manager: Chris Huffman
- Regarding: Quote # 2009
- Details: Microsoft Sans Serif, 8

The Chart below has the combinations

1	Contact	Notes on ACT item to test	TYPE	START	Regarding	Shortcut Flag	ATTACHMENT File Name with path	Details
2	Emily Dunn	History Tab - Attach File	Attachment	1/1/2018	Excel Test-XLS FORMAT.xls		C:\E Tech Systems\ACT\Attachments for import tests\Excel Test-XLS FORMAT.xls	
3	Emily Dunn	History Tab - Attach Shortcut	Attachment	1/2/2018	Microsoft Word Test 2 -LINK-Shortcut.Ink	TRUE	C:\E Tech Systems\ACT\Attachments for import tests\Microsoft Word Test 2 -LINK-Shortcut.Ink	
4	Nathan Cutting Brittles	Document Tab - File	Library Document	1/3/2018	Microsoft Word Test 1 -Short Cut-Document.docx		C:\E Tech Systems\ACT\Attachments for import tests\Microsoft Word Test 1 Document.docx	
5	Nathan Cutting Brittles	Document Tab - Shortcut to File	Library Document	1/4/2018	Microsoft Word Test 2 -LINK-Shortcut.Ink	TRUE	C:\E Tech Systems\ACT\Attachments for import tests\Microsoft Word Test 2 -LINK-Shortcut.Ink	
6	Nathan Cutting Brittles	Document Tab - Shortcut to Folder	Library Document	1/5/2018	Files List in Folder ...Attachments for import tests\		C:\E Tech Systems\ACT\Attachments for import tests\	C:\E Tech Systems\ACT\Attachments for http://www.oakmerge.com/downloads/Overview_OAKMer
7	Nathan Cutting Brittles	Document Tab -Link(URL)	Library Document	1/6/2018	URL TEST-Microsoft Word Test 3 Document.docx			
8	Bella Minoal	History Tab - Attach Shortcut	Attachment	1/7/2018	Oakmerge_Roadmap-COPY3.pdf	TRUE	C:\E Tech Systems\ACT\Attachments for import tests\Oakmerge_Roadmap-COPY3.pdf	
9	Bella Minoal	History Tab - Attach File	Attachment	1/8/2018	Oakmerge_Roadmap1.pdf		C:\E Tech Systems\ACT\Attachments for import tests\Oakmerge_Roadmap1.pdf	
10	Bella Minoal	Document Tab - Link(URL)	Library Document	1/9/2018	Overview_OAKMerge.pdf			http://www.oakmerge.com/downloads/Overview_OAKMer
11	Bella Minoal	History Tab - Attach File	Attachment	1/12/2018	word doc test 1		C:\E Tech Systems\ACT\Attachments for import tests\Microsoft Word Test 1 -Short Cut- Document.docx	
12	Bella Minoal	History Tab - Attach File	Attachment	1/13/2018	Excel XLSX test		C:\E Tech Systems\ACT\Attachments for import tests\EXCEL Test-XLSX FORMAT.xlsx	



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Merge Rules

Act! Table:

Delimited File (csv or txt) Table: Display Mapped Only

Merge Source	Delimited File (csv or txt) (source) Field or Value	Act! (target) Fields	Data Type	Required	Transformation Rule
> Source Table Column	Contact	Link To: Contacts by Full ...	String		No Transformation
Source Table Column	TYPE	History Type (Result)	String	!	No Transformation
Source Table Column	DESCRIPTION -is Doc Name to Regarding	Regarding	String		No Transformation
Source Table Column	Details	Details	String		No Transformation
Source Table Column	START	Start Time	DateTime	!	No Transformation
Source Table Column	ATTACHMENT File Name path	Attachment Description	String		No Transformation
Source Table Column	ATTACHMENT File Name path	Attachment File Name	String		No Transformation
Source Table Column	field Attachment Shortcut Flag	Attachment As Shortcut	Boolean		No Transformation



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Typical Mapping is

Merge Rules

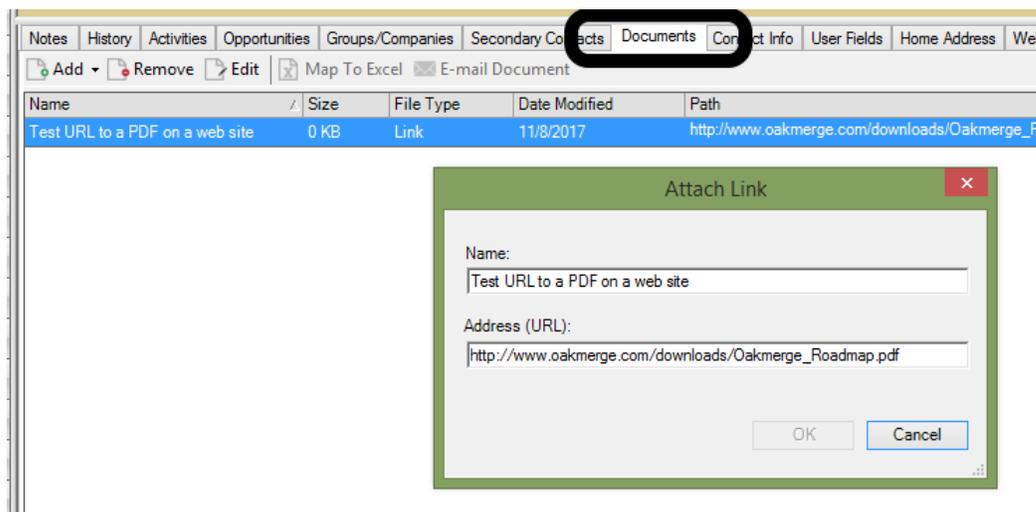
ACT! Table: History

Delimited File (csv or txt) Table: CSV Table

Merge Source	Delimited File (csv or txt) (source) Field or Value	ACT! (target) Fields	Data Type
Source Table Column	RECORD_CONTACT_NAME	Link To: Contacts by Full Contact Name	String
Source Table Column		Link To: Contacts by ACT! GUID	String
Source Table Column		Link To: Companies by Company Name	String
Source Table Column		Link To: Companies by ACT! GUID	String
Source Table Column		Link To: Opportunities by Opportunity ...	String
Source Table Column		Link To: Opportunities by ACT! GUID	String
Source Table Column		Link To: Groups by Group Name	String
Source Table Column		Link To: Groups by ACT! GUID	String
Source Table Column	RECORD_USER	Record Manager (Name, Login or GUID)	String
Source Table Column	HISTORY_TYPE	History Type (Result)	String
Source Table Column	REGARDING	Regarding	String
Source Table Column		Details	String
Source Table Column	START_TIME	Start Time	DateTime
Source Table Column		End Time	DateTime
Source Table Column		Attachment Description	String
Source Table Column	ATTACHMENT_FILENAME	Attachment File Name	String
Source Table Column	ATTACHMENT_SHORTCUT	Attachment As Shortcut	Boolean

Links are URLs

You can set a link up using a URL to a file on a website for display on the Documents tab. It will open when double clicked.





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Exporting Attachments and Documents

You can export the links to the attachments via the HISTORY export. See the section on exporting History for steps on how to export.

There are columns for attachment name and path. You can also see who they are linked to in each row.

Note a newer feature allows you export the history for only the contacts in a group or a special group called OAKMerge_Export if you want to do some testing or a limited export.

The actual files are NOT exported.

Example 4: Group Assignment Merge

Contacts may be added as static member of a group. You UPDATE or ADD a contact while setting the LINK to field.

Adding Contacts to groups is shown in the sample file GROUP_10.csv

Sample data looks like:

Company	Contact	GROUP_NAME	end
Boomer's Artworx	Emily Dunn	TEST1	end
Boomer's Artworx	Bettie James	TEST1	end
Corleone's Pasta Company	Morty Manicotti	TEST1	end
Duke Industries	Nathan Cutting Brittles	TEST1	end
Duke Industries	Marion Morrison	TEST1	end
Duke Industries	Kirby York	TEST1	end
Duke Industries	Ethan Edwards	TEST1	end
Jake Flakes Inc.	Bella Minoal	TEST1	end
Mad House;The	Greg Hart	TEST2	end
Yellow Jersey Bikes	Ashley Allan	TEST2	end

The Group names must exist and be unique. The sub group parent name is not used and cannot be set. Top level and sub groups are all treated the same. Use the "Link to Groups by Group Name" field

In this example we are using 2 fields to match on (Contact and Company) then updating one field: the link to Group buy Group name field.



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Merge Rules

ACT! Table:

Delimited File (csv or txt) Table: Display Mapped Only

Merge Source	Source Field o...	Matching Fields	ACT! Fields	Data Type	Re...	Transformation Rule
Source Table Column	Contact	<input checked="" type="checkbox"/>	Contact	String		No Transformation
Source Table Column	Company	<input checked="" type="checkbox"/>	Company	String		No Transformation
Source Table Column	GROUP_NAME	<input type="checkbox"/>	Link To: Groups by Group Name	String		No Transformation

EXECUTE OPTIONS

If a Match is Found: If a Match is NOT Found:

TIP: : If you don't have a group name in a field in the source file, you can use a constant value in the mapping to add all the contacts to the same group. Remember, the group MUST exist in Act! before you can add contacts to it. OAK!Merge can also import Groups (even as subgroups of groups)



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Example: You put the group name in the source file. Each row in a source file will update the group membership for all the contacts that match, but only the first one will be used if there are duplicate rows . in the source file, based on the fields selected for "matching" .

TEST 1

If you are matching on Contact name, this works

```
CONTACT, GROUP_NAME  
Contact A, Group 33  
Contact B, Group 7  
Contact C, Group 33
```

...

Above is adding 3 people to one group each. May be the same or different groups. Below is One person, trying to add them to 3 groups at once

TEST2

If you are matching on Contact name, this does **NOT** work

```
CONTACT, GROUP_NAME  
Contact A, Group 33  
Contact A, Group 7  
Contact A, Group 4
```

...

If you have data such as TEST 2, you would need to sort it and create different files for each group, each with no duplicate contacts in a CSV

File1

```
Contact A, Group 33  
Contact G, Group 33  
Contact Z, Group 33
```

...

File 2

```
Contact A, Group 7
```

File 3

```
Contact A, Group 4  
Contact G, Group 4
```

...



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Example 5: Notes. Merge

You can ADD Notes and link them to Contacts, Companies, or Opportunities. You can also DELETE Notes. See the index or table of contents for how to Delete notes. You cannot UPDATE existing Notes.

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 15\Samples\Notes_10.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id: [Empty]

Password: [Empty]

Samples\Notes_10.csv

Company	Contact	Time	Note	Temp_end
Boomer's				
Artworx	Emily Dunn	7/7/2001	C:\Oakmerge_Roadmap_Versions4.xls	Temp_end
Boomer's			Phone call - on sales of a new boat with a	
Artworx	Emily Dunn	7/2/2001	long description of the contents	Temp_end



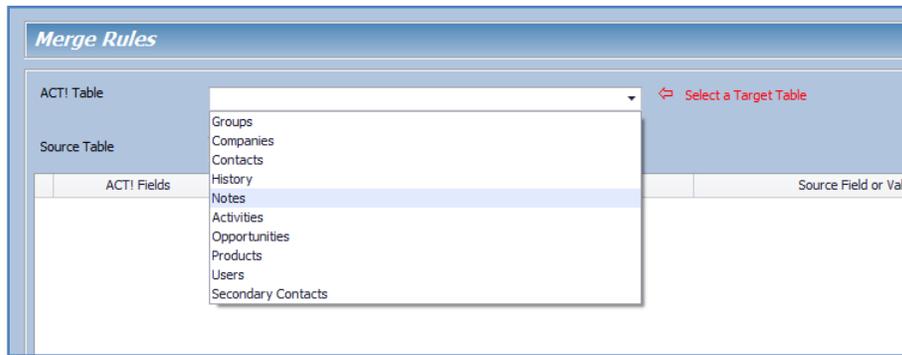
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			TEST BIG NOTE as a TABLE Company	
			Contact GROUP_NAME end	
			Boomer's Artworx Emily Dunn TEST1 end	
			Boomer's Artworx Bettie James TEST1 end	
			Corleone's Pasta Company Morty Manicotti	
			TEST1 end	
			Duke Industries Nathan Cutting Brittles	
			TEST1 end	
			Duke Industries Marion Morrison TEST1	
			end	
			Duke Industries Kirby York TEST1 end	
			Duke Industries Ethan Edwards TEST1	
			end	
Boomer's			Jake Flakes Inc. Bella Minoal TEST1 end	
Artworx	Emily Dunn	7/3/2001	Mad House;Thekes Ashley Allan TEST2 end	Temp_end
	Nathan			
Duke	Cutting			
Industries	Brittles	7/4/2001	left voice mail	Temp_end

Select Notes as the target Act! Table



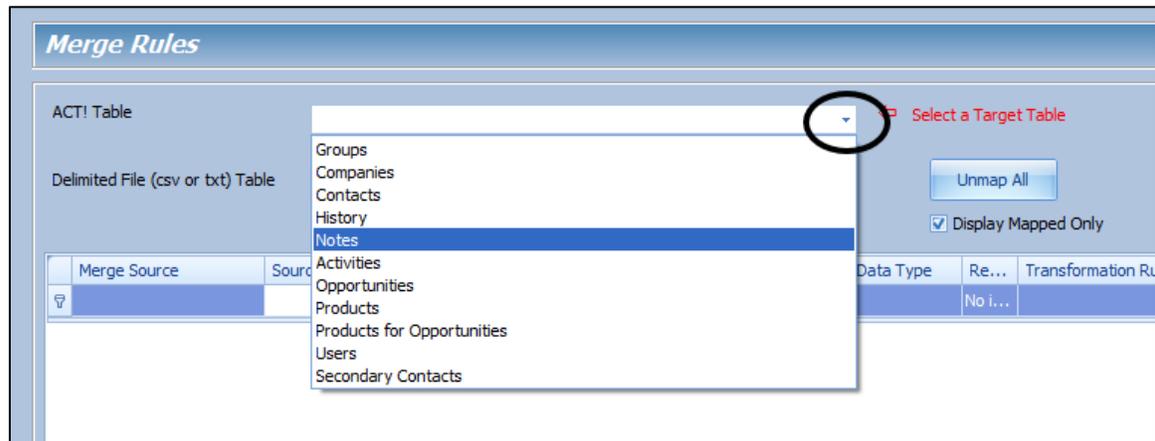
Map the Date/Time and Regarding. The Link To: fields connect the notes to contacts, companies, groups, opportunities, or custom tables.



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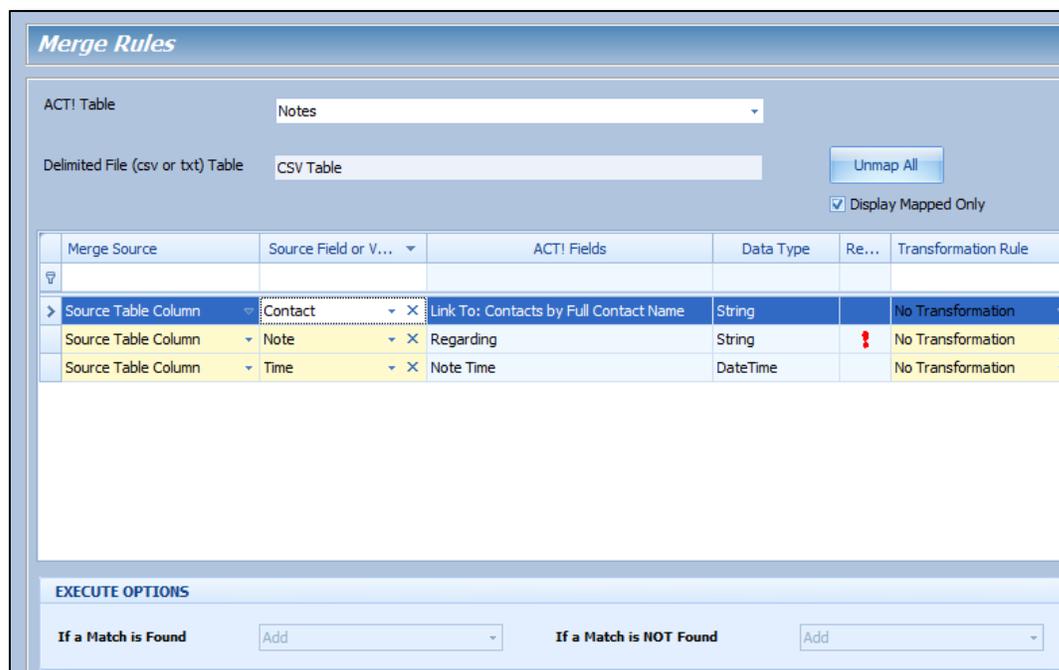


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Linking rules: Only the name, GUID, or a custom field called OAKMergeID can be used to LINK notes to top level tables. If a custom field called OAKMergeID exists in the top level table, then the LINK using it will appear as an option in the mapping for that table.

Map the note info to Regarding, and Date or Date/Time to Time.





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Note a custom field called OAKMergeID was added to this Act! Demo database to the Companies, so it appears as an option for Linking notes to companies. It is not available for linking to Opportunities because the opportunity table in Act! does not have a custom field called OAKMergeID.

TIP: . You can not link a Note to multiple contacts in one row of data. You would need to duplicate the note for each additional contact. If you needed to link a note to 6 contacts, you would need 6 rows of data, each with a different link to ID.

TIP: If you link Notes to contacts, you do **not** also need to link them to companies. They roll-up anyway as viewable in ACT.

Merge Source	Source Field or Value	ACT! Fields	Data Type	Re...	Transformation Rule
Source Table Column	Contact	Link To: Contacts by Full Contact Name	String		No Transformation
Source Table Column		Link To: Contacts by ACT! GUID	String		No Transformation
Source Table Column		Link To: Companies by Company Name	String		No Transformation
Source Table Column		Link To: Companies by ACT! GUID	String		No Transformation
Source Table Column		Link To: Companies by OAKMergeID	String		No Transformation
Source Table Column		Link To: Opportunities by Opportunity ...	String		No Transformation
Source Table Column		Link To: Opportunities by ACT! GUID	String		No Transformation
Source Table Column		Link To: Groups by Group Name	String		No Transformation
Source Table Column		Link To: Groups by ACT! GUID	String		No Transformation

EXECUTE OPTIONS

Execute options for Notes, History, and Activities are always grayed out. They are append only. There is no matching to find and update data in these tables.

EXECUTE OPTIONS

If a Match is Found: Add

If a Match is NOT Found: Add

Support / Tools Close Back Next Finish



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Set Execution and Logging Level options, then Run to execute.

TIP: Optionally, you can save all the settings by saving the Profile. If you save the profile, saving the mappings separately is not needed. Mappings are included in Profiles.

Ready to Run

EXECUTION OPTIONS

Validate only
 Test Run: limited to 100 rows
 Complete Run

Execution Logging Level: Full Logging

MAPPING INFORMATION

Name: Save

PROFILE INFORMATION

Name: Save

Description:

MERGE CONFIGURATION

Delimited File	ACT!
file_name: C:\E Tech Systems\ACT\OAK!Merge 13\Samples\notes_10.csv	database: C:\Users\Alan\Documents\ACT\ACT Data\Databases\ACT2011Demo.PAD
first_row_as_header: True	user: Chris Huffman
delimiter: Comma	pwd:

ACT! Notes		CSV Table	
Merge Options:			
Add-only mode: all source rows will be appended to the target table			
Link To: Contact by Full Name	Source Table Column	Contact	No Transformation
Link To: Company by Name	Source Table Column	Company	No Transformation
Regarding	Source Table Column	Note	No Transformation
Note Time	Source Table Column	Time	No Transformation

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Support / Tools Close Back Start Over Run



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Review Merge Results

Initial import numbers:	Rows in source table	10
	Rows in target table	0

Import for table Notes has completed with errors.

After import numbers:	Total rows processed	10
	Rows in target table	8
By Status:	Rows processed successfully	8
	Rows processed with warnings	0
	Rows skipped due to errors	2
Merged rows summary:	Added to target	8
	Updated in target	0
	Deleted from target	0
	Skipped in source	0
	Duplicates in source	0

Additional details: Execution time: 1 sec

All Rows	Processed Completely	Processed With Warnings	Skipped Due to Errors
-			Record 8 could not be merged due to errors.
Issues:	Regarding: Source value for required target field is empty (blank).(The source value is coming from column [Note].)		
-			Record 10 could not be merged due to errors.
Issues:	Regarding: Source value for required target field is empty (blank).(The source value is coming from column [Note].)		

2 test records were skipped because a required field (Regarding) was blank.

Notes imports require a date and regarding. Any rows that are not properly linked will be added to the "My record" of the Act! user specified in OAK!Merge where the target database was picked. If no record manager is specified in the source file or as constant, they will all be set to the Act! user specified in OAK!Merge where the target database was picked.



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ACT! by Sage Premium - ACT10Demo

File Edit View Lookup Contacts Groups Companies Schedule Write Reports Tools Help

1 of 1

Contact Detail View Groups/Companies...

CH Tech ONE

Company: Boomer's Artworx Address: 8907 E. Rosebud Lane ID/Status: Prospect
 Contact: Emily Dunn Suite 25 Referred By: ACCT system
 Salutation: Emily Key Contact: City: Scottsdale Customer ID: A_0023
 Title: Sales Representative State: AZ First Purchase:
 Department: ZIP Code: 85258 Last Years Purchases:
 Phone: (602) 555-4874 Ext. Country: United States Trivia:
 Mobile: (602) 555-1142 Web Site:
 Fax: (602) 555-8848 E-mail:
 Alt:
 Last Results: Last Edited by: Chris Huffman
 Last Reach: 7/3/2001 Last Meeting: Last Letter: Last E-mail: 6/9/2005 Last Edited: 12/6/2007

Notes History Activities Opportunities Groups/Companies Secondary Contacts Documents Contact Info User Fields Home Address Snapshot

Dates: All Dates Select Users Options

Date	Time	Regarding	Record Manager	Group/Comp	
7/3/2001	12:00 AM	left voice mail	Chris Huffman	Boomer's Ar	
7/3/2001	12:00 AM	TEST BIG NOTE as a TABLE Company Contact GROUP_NAME end Boomer's Artworx Emily Dunn TEST1 end Boomer's Artworx Bettie James TEST1 end Corleone's Pasta Company Morty Manicotti TEST1 end Duke Industries Nathan Cutting Brittles TEST1 end Duke Industries Marion Morrison TEST1 end Duke Industries Kirby York TEST1 end Duke Industries Ethan Edwards TEST1 end Jake Flakes Inc. Bella Minoal TEST1 end Mad House;Thekes Ashley Allan TEST2 end	Chris Huffman	Boomer's Ar	TEST BIG NOTE as a TABLE Company Contact GROUP_NAME end Boomer's Artworx Emily Dunn TEST1 end Boomer's Artworx Bettie James TEST1 end Corleone's Pasta Company Morty Manicotti TEST1 end Duke Industries Nathan Cutting Brittles TEST1 end Duke Industries Marion Morrison TEST1 end Duke Industries Kirby York TEST1 end Duke Industries Ethan Edwards TEST1 end Jake Flakes Inc. Bella Minoal TEST1 end Mad House;Thekes Ashley Allan TEST2 end
7/2/2001	12:00 AM	Phone call - on sales of a new boat with a long description of the contents	Chris Huffman	Boomer's Ar	

Layout

Lookup: Last Name

start Desktop 12:08 AM



OAK!Merge User's Guide



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Example 6: Simple Opportunity Merge

C:\E Tech Systems\ACT\OAK!Merge 21\Samples\Oppoutunity_Simple_10_3_4.csv

	A	B	C	D	E	F	G
1	Company	Contact	Name	Status	Estimated Close Date	end	
2	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_101	Open	1/1/2010	end	
3	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_102	Open	1/2/2010	end	
4	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_103	Open	1/3/2010	end	
5	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_104	Open	1/4/2010	end	
6	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_105	Lost	7/7/1977	end	
7	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_106	Won	12/12/2000	end	
8	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_107	Closed-Won	12/13/2000	end	
9	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_108	Inactive	12/14/2000	end	
10	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_109	Inactive	12/15/2000	end	
11	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_110	Inactive	12/15/2000	end	
12							
13							
14							

Company	Contact	Name	Status	Estimated Close Date	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_101	Open	1/1/2010	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_102	Open	1/2/2010	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_103	Open	1/3/2010	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_104	Open	1/4/2010	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_105	Lost	7/7/1977	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_106	Won	12/12/2000	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_107	Closed-Won	12/13/2000	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_108	Inactive	12/14/2000	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_109	Inactive	12/15/2000	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_110	Inactive	12/15/2000	end



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Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 15\Samples\Oppoutunity_Simple_10_3_4.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

Password:



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Select Opportunity Table

Merge Rules

ACT! Table: Opportunities

Delimited File Table:

ACT! Fields	Source Table Column
Opportunity Name	
Status	
Process	
Stage	
Probability of Close	Int32 <input type="checkbox"/>

Dropdown menu options: Opportunities, Groups, Companies, Contacts, History, Notes, Activities, Opportunities, Products, Users, Secondary Contacts



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Set the Mappings and execute options at the bottom

This one is set to match on opportunity name, update it IF it is found; otherwise ADD it. Each opportunity is also LINKED to contacts and companies. Linking is optional for opportunities, but is usually done to tie the opportunity to a contact. The OAKMergeID field can also be used for linking. See example 17 or OAKMergeID in the index for more information.

Process and stage are required fields and are not in the sample CSV so you have to add them to the mapping as Constant Values. They could be in the CSV and different for each opportunity. If they are not valid in the target database, that row, OAK!Merge will try one from the demo database: Process: CH1 Sales and Stage: Initial Communication. If that fails, then the row is skipped do to an error. See Appendix on Errors and Warnings for other messages.

Merge Rules

ACT! Table: Opportunities

Delimited File (csv or txt) Table: CSV Table

Display Mapped Only

	Merge Source	Source Field or ...	Matching Fields	ACT! Fields	Data Type	Re...	Transformation Rule
	Source Table Column	Name	<input checked="" type="checkbox"/>	Opportunity Name	String		No Transformation
	Source Table Column	Status	<input type="checkbox"/>	Status	String		No Transformation
	Constant Value	CHT1 Sales	<input type="checkbox"/>	Process	String		No Transformation
	Constant Value	Initial Communication	<input type="checkbox"/>	Stage	String		No Transformation
	Source Table Column	Estimated Clo...	<input type="checkbox"/>	Estimated Close Date	DateTime		No Transformation
	Source Table Column	Contact	<input type="checkbox"/>	Link To: Contacts by Full Contact Name	String		No Transformation

EXECUTE OPTIONS

If a Match is Found: Update

If a Match is NOT Found: Add



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Status for Opportunities can be specified as:

- Open
- Won OR Closed – Won
- Lost OR Closed – Lost
- Inactive

Select Complete Run

Ready to Run

EXECUTION OPTIONS

Validate only
 Test Run: limited to rows
 Complete Run

Execution Logging Level:

MAPPING INFORMATION

Name:

PROFILE INFORMATION

Name:

Description:

MERGE CONFIGURATION

Delimited File (csv or txt)	↓	ACT!
file_name: C:\E Tech Systems\ACT\OAK!Merge 15 Samples\Oppoutunity_Simple_10_3_4.csv	→	database: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad
first_row_as_header: True		user: <input type="text"/>
delimiter: Comma		pwd: <input type="text"/>



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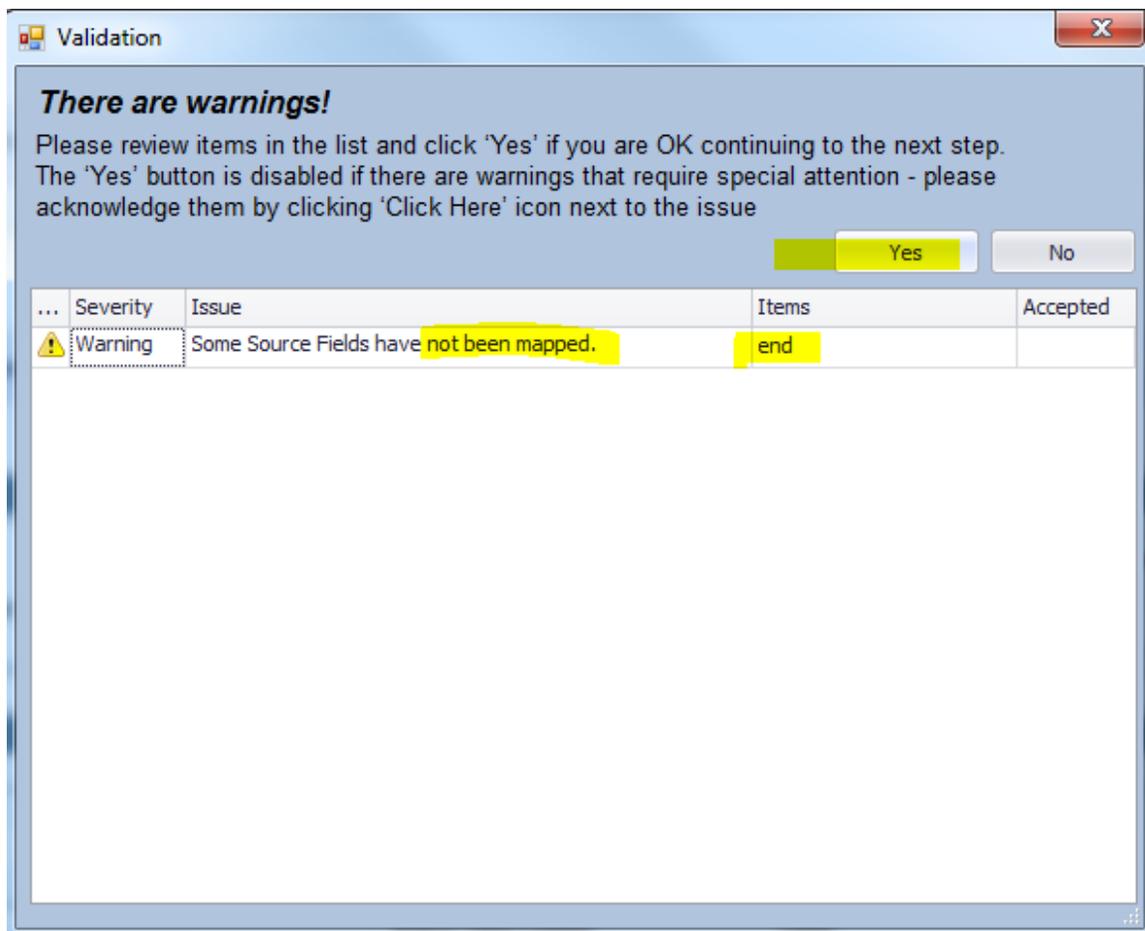


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You will receive a validation dialog box if you have fields not mapped, or mapped to more than one field, or appending only, etc. Review the warnings and select Yes if you want to proceed as is.

The "end" field is used in some of the examples as a way to visually review the CSV in excel to verify it has the right delimiters. It is not mapped in OAK!Merge.

In some you have to each row "OK" to proceed; then the yes button





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The progress bars give you the overall status of the merge. If you cancel, it waits until the next step to stop. Cancel does not interrupt the active step

Merging ...	
Execution Step	Progress Status
 In progress	Executing ... 00:00:01
 Step 1: Indexing target 'ACT!' data	Complete
 Step 2: Loading source 'Delimited File (csv or txt)' data for processing	Complete
 Step 3: Processing required updates	0%
 Step 4: Write data to 'ACT!'	Scheduled

Results page appears next.



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Review Merge Results

Importing table Opportunities from CSV Table.
If you have ACT! open, you may need to refresh the current view to see updated data.

Initial import numbers:	Rows in source table	10
	Rows in target table	382

Import for table Opportunities has completed successfully.

After import numbers:	Total rows processed	10
	Rows in target table	389
By Status:	Rows processed successfully	10
	Rows processed with warnings	0
	Rows skipped due to errors	0
Merged rows summary:	Added to target	7
	Updated in target	3
	Deleted from target	0
	Skipped in source	0
	Duplicates in source	0

Additional details: Execution time: 3 sec

All Rows	Processed Completely	Processed With Warnings
- Record 1 was added.		
Row: Opportunity Name: Test_Opp_Name_Simple_101		
- Record 2 was added.		



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The screenshot displays the ACT! by Sage Premium - ACT10Demo software interface. The main window shows the 'Contact Detail' for 'CH Tech ONE'. The contact information includes:

- Company: A1 Services of UK
- Contact: Angela Ives
- Salutation: Angela
- Title: Music and Lighting Coordinator
- Department: [Empty]
- Phone: 0174 287623
- Mobile: [Empty]
- Fax: 0174 287623
- Alt: [Empty]
- Address: 67a Station Road
- City: Blackpool
- State: Lancashire
- ZIP Code: BP12 7HT
- Country: United Kingdom
- Web Site: [Empty]
- E-mail: [Empty]
- ID/Status: Prospect
- Referred By: [Empty]
- Customer ID: [Empty]
- First Purchase: [Empty]
- Last Years Purchases: [Empty]
- Trivia: [Empty]
- Last Edited by: Ernst Anderson
- Last Edited: 5/20/2007

Below the contact details is an 'Opportunities List' table with the following data:

Status	Opportunity Name	Stage	Probability of...	Product Name	Total	Weighted Total	Record Manager	Assoc
Open	Test_Opp_Name_Simple_104	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Inactive	Test_Opp_Name_Simple_110	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Open	Test_Opp_Name_Simple_103	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Open	Test_Opp_Name_Simple_102	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Inactive	Test_Opp_Name_Simple_109	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Closed - Lost	Test_Opp_Name_Simple_105	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Closed - Won	Test_Opp_Name_Simple_106	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Open	Test_Opp_Name_Simple_101	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Inactive	Test_Opp_Name_Simple_108	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Closed - Won	Test_Opp_Name_Simple_107	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	

At the bottom of the window, a status bar shows: 'Lookup: All Contacts Opportunities: 11 Weighted Total \$3,000.00 Grand Total \$12,000.00'. The Windows taskbar at the bottom shows the Start button and several open applications including '2 Windows Explorer', 'ACT! by Sage Premiu...', 'Oakmerge10_Manual...', 'Snagit/32 Capture Pr...', 'OAK!Merge Wizard - ...', and the system clock showing '3:50 PM'.

TIP: The Total and Weighted dollar amount fields are not updateable. If you want Opportunities to have a Total and Weighted dollar amount, you must add at least one product



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Example 7: Opportunity Merge with one Product

A simple merge with one product per Opportunity:

Source File Example

1	Company	Contact	Name	Status	Process	Stage	Product	Quantity	Price	Probabilit	Estimated	end
2	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Open	ACT! Sales Cycle	Initial Communication	ONE Component	1	0	10	1/1/2010	end
3	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Open	ACT! Sales Cycle	Initial Communication	ONE Component	2	7.88	22	1/2/2010	end
4	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Open	ACT! Sales Cycle	Needs Assessment	ONE Component	3		25	1/3/2010	end
5	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Open	ACT! Sales Cycle	Presentation	Service Contract	4	44.44	40	1/4/2010	end
6	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Lost	ACT! Sales Cycle	Needs Assessment	Service Contract	5	750	88	7/7/1977	end
7	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Won	ACT! Sales Cycle	Needs Assessment	Service Contract	6	100	100	12/12/2000	end
8	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Closed-Won	ACT! Sales Cycle	Sales Fulfillment	Service Contract	7	1000	100	12/13/2000	end
9	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Inactive	ACT! Sales Cycle	Negotiation	TechONE System	8	10000	0	12/14/2000	end
10	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Inactive	ACT! Sales Cycle	Initial Communication	TechONE System	9	5678.99		12/15/2000	end
11	Yellow Jersey Bikes	Ashley Allar	Test_Opp	Inactive	ACT! Sales Cycle	Negotiation	TechONE System	10	1000000	0	12/15/2000	end

Company	Contact	Name	Status	Process	Stage	Product
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c101	Open	Act! Sales Cycle	Initial Communication	ONE Component
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c102	Open	Act! Sales Cycle	Initial Communication	ONE Component
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c103	Open	Act! Sales Cycle	Needs Assessment	ONE Component
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c104	Open	Act! Sales Cycle	Presentation	Service Contract
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c105	Lost	Act! Sales Cycle	Needs Assessment	Service Contract
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c106	Won	Act! Sales Cycle	Needs Assessment	Service Contract
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c107	Closed-Won	Act! Sales Cycle	Needs Assessment	Service Contract
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c108	Inactive	Act! Sales Cycle	Sales Fulfillment	Service Contract
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c109	Inactive	Act! Sales Cycle	Negotiation	TechONE System
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c110	Inactive	Act! Sales Cycle	Initial Communication	TechONE System
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c110	Inactive	Act! Sales Cycle	Initial Communication	TechONE System



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Selecting Import Source and Merge Destination

IMPORT SOURCE	
Type	Delimited File (csv or txt)
File	C:\E Tech Systems\ACT\OAK!Merge 15\Samples\Oppoutunity_with_Products_16.csv
Delimiter	Comma
<input checked="" type="checkbox"/> First Row Contains Field Names	

MERGE DESTINATION	
Type	ACT!
ACT! PAD File	C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad
User Id	
Password	

Or optionally use OAKMergeIDs to link the Opportunities to the contacts. First update the OAKMergeID field in the contact; then you can link to the Contact using OAKMergeID. Sample file is Oppoutunity_with_Products_and_OAK!MergeIDs_12_4.csv



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Map: Product, Price, and Quantity to add a product

Merge Rules

ACT! Table: Opportunities

Delimited File (csv or txt) Table: CSV Table

Display Mapped Only

Merge Source	Source Field or Value	Matching Fi...	ACT! Fields	Data Type	R...	Transformation P
Source Table Column	Name	<input checked="" type="checkbox"/>	Opportunity Name	String	<input checked="" type="checkbox"/>	No Transformatio
Source Table Column	Status	<input type="checkbox"/>	Status	String	<input type="checkbox"/>	No Transformatio
Source Table Column	Process	<input type="checkbox"/>	Process	String	<input type="checkbox"/>	No Transformatio
Source Table Column	Stage	<input type="checkbox"/>	Stage	String	<input type="checkbox"/>	No Transformatio
Source Table Column	Probability of Close	<input type="checkbox"/>	Probability of Close	Int32	<input type="checkbox"/>	No Transformatio
Source Table Column	Estimated Close Date	<input type="checkbox"/>	Estimated Close Date	DateTime	<input type="checkbox"/>	No Transformatio
Source Table Column	Contact	<input type="checkbox"/>	Link To: Contacts by Full Conta...	String	<input type="checkbox"/>	No Transformatio
Source Table Column	Product	<input type="checkbox"/>	Opportunity Product	String	<input type="checkbox"/>	No Transformatio
Source Table Column	Price	<input type="checkbox"/>	Opportunity Product Price	Decimal	<input type="checkbox"/>	No Transformatio
Source Table Column	Quantity	<input type="checkbox"/>	Opportunity Product Quantity	Decimal	<input type="checkbox"/>	No Transformatio

EXECUTE OPTIONS

If a Match is Found: Update

If a Match is NOT Found: Add

TIP: If you link it to contact and the contact does not exist a new contact will NOT be added. The opportunity shows up under the Act! "my record" of the user login used for doing the import.



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Complete Run:

Ready to Run

EXECUTION OPTIONS

Validate only
 Test Run: limited to rows
 Complete Run

Execution Logging Level:

MAPPING INFORMATION

Name

Results:

Review Merge Results

Importing table Opportunalties from CSV Table.

Initial import numbers:	Rows in source table	10
	Rows in target table	287

Import for table Opportunalties has completed successfully.

After import numbers:	Rows in target table	297
	Total rows processed	10
By Status:	Rows processed successfully	10
	Rows processed with warnings	0
	Rows skipped due to errors	0
Merged rows summary:	Added	10
	Updated	0
	Deleted	0
	Skipped	0
	Duplicates	0



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The screenshot displays the ACT! by Sage Premium software interface. The top window title is "ACT! by Sage Premium - ACT10Demo". The menu bar includes File, Edit, View, Lookup, Contacts, Groups, Companies, Schedule, Write, Reports, Tools, and Help. The status bar shows "179 of 184" contacts. The main window is titled "Contact Detail" and shows information for "CH Tech ONE".

Contact Detail for CH Tech ONE:

- Company: Yellow Jersey Bikes
- Contact: Ashley Allan
- Salutation: Ashley
- Title: VP of Sales
- Department: [Empty]
- Phone: (619) 555-8890
- Mobile: [Empty]
- Fax: (619) 555-7800
- Alt: [Empty]
- Address: 315 Center Dr., Suite 100
- City: San Diego
- State: CA
- ZIP Code: 92109
- Country: United States
- Web Site: www.vibikes.com
- E-mail: ashley@vibikes.com
- ID/Status: [Empty]
- Referred By: [Empty]
- Customer ID: [Empty]
- First Purchase: 1/27/2001
- Last Years Purchases: \$250
- Trivias: [Empty]
- Last Edited by: Chris Huffman
- Last Edited: 5/21/2007
- Last Reach: 6/11/2005
- Last Meeting: 4/25/2007
- Last Letter: [Empty]
- Last E-mail: [Empty]

Opportunity List:

Status	Opportunity Name	Stage	Probability of...	Product Name	Total /	Weighted Total	Record Manager	Associate
Closed - Lost	Test_Opp_Name_c105	Needs...	88% (None)		\$0.00	\$0.00	Chris Huffman	
Inactive	Test_Opp_Name_c108	Negotiation	0% (None)		\$0.00	\$0.00	Chris Huffman	
Open	Test_Opp_Name_c103	Needs...	25% ONE Component		\$0.00	\$0.00	Chris Huffman	
Inactive	Test_Opp_Name_c110	Negotiation	0% (None)		\$0.00	\$0.00	Chris Huffman	
Closed - Won	Test_Opp_Name_c107	Sales Fulfillment	100% (None)		\$0.00	\$0.00	Chris Huffman	
Inactive	Test_Opp_Name_c109	Initial...	0% (None)		\$0.00	\$0.00	Chris Huffman	
Open	Test_Opp_Name_c101	Initial...	10% ONE Component		\$0.00	\$0.00	Chris Huffman	
Closed - Won	Test_Opp_Name_c106	Needs...	100% (None)		\$0.00	\$0.00	Chris Huffman	
Open	Test_Opp_Name_c102	Initial...	22% ONE Component		\$15.76	\$3.47	Chris Huffman	
Open	Test_Opp_Name_c104	Presentation	40% Service Contract		\$177.76	\$71.10	Chris Huffman	

The bottom status bar shows "Lookup: All Contacts" and "Opportunities: 10 Weighted Total \$74.57 Grand Total \$193.52". The taskbar at the bottom shows the Windows Start button and several open applications including "ACT! by Sage Premium", "Oakmerge10_Manual...", "Snagit/32 Capture Pr...", and "OAK!Merge Wizard".

You can match on any field or fields in the opportunity if you want to find and update or delete an opportunity.

TIP: : You can create a custom field in the opportunity called OAKMergeID if you want to use it to LINK other table info like History back to the opportunity.



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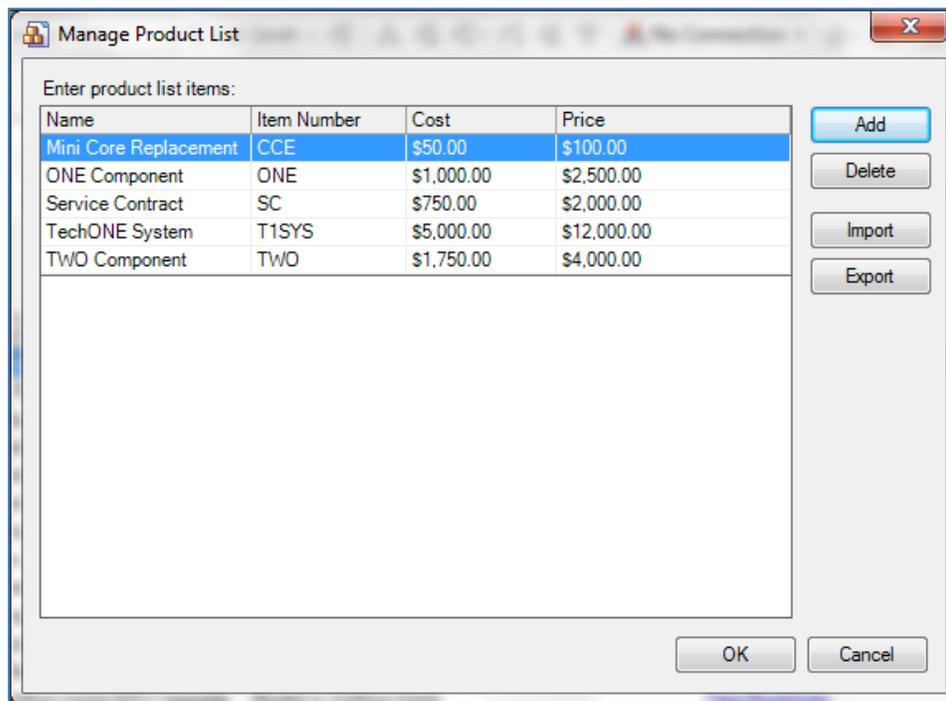
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Example 8: Merging info into the PRODUCT table

You can have products in Opportunity merges, but they must be valid product names in Act! . You can manually create the products in Act! or import the product names with OAK!Merge before importing opportunities with Products.

When you import info to the Products area of Act! only 4 fields are available to map to. No custom Product fields are available in the Products table. Custom Product fields can be used for a specific Opportunity. You cannot set defaults for a custom product fields.

Act!'s Manage products view and table do not have custom fields:



When you add custom Product fields in the Define Fields area, they do not show up in the view above.



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Field Name	Field Type
Adjusted Price	Currency
Cost	Currency
Discount	Decimal
Item #	Character
Name	Character
Price	Currency
Quantity	Decimal
Subtotal	Currency
TEST 1	Character
Test 2	Character
Type	Character

Sample import to the Product table: has 4 fields you can update.

	ACT! Fields	Data Type	Matching Fields	Required	Merge Source	Sou
I	Name	String	<input type="checkbox"/>	!	Source Table Column	ContactName
	ItemNumber	String	<input type="checkbox"/>		Source Table Column	
	Cost	Decimal	<input type="checkbox"/>		Source Table Column	
	Price	Decimal	<input type="checkbox"/>		Source Table Column	



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When you add custom fields for the products, they ARE available to store data with each opportunity

Name	ONE Component
Item #	ONE
Quantity	1.00
Cost	\$1,000.00
Price	\$2,500.00
Adjusted Price	\$0.00000000
Discount	0.0000000000%
Subtotal	\$0.00000000
Test 2	
TEST 1	

There are 2 ways (Tables) that OAK!Merge can add products to an Opportunity.

You can have products in Opportunity merges, but it is only one product at a time if you are doing an opportunity update. If you need three products on the same opportunity, you would need to do one merge to the Product_Opportunity Table or three merges to the Opportunity table: One to add the opportunity along with the 1st product and then two more to add one product each.



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Example 9: Multiple Products to Multiple Opportunities Merges

You can merge

Add one or more products to existing Opportunities by selecting the target table of Products_Opportunities,

The Opportunity and the products must exist before the merge. If not, the row will be skipped and no error/warning is reported.

SAMPLE Merge file: Products for Opportunities.csv

	A	B	C	D	E	F
1	Name of OPP for LINKING	Product Name for LINKING	Quantity	Price	Desc-Test	Test Number as Text
2	Test_Opp_Name_c101	TechONE System	1	50000	Custom Field info 1	\$10,001
3	Test_Opp_Name_c101	ONE Component	2	350	Custom Field info 2	\$10,002
4	Test_Opp_Name_c101	ONE Component	3	355	Custom Field info 3	\$10,003
5	Test_Opp_Name_c101	Service Contract	4	4000	Custom Field info 4	\$10,004
6	Test_Opp_Name_c101	Service Contract	5	299	Custom Field info 5	\$10,005
7	Widget Corporation-Replacement Parts	ONE Component	6	360	Custom Field info 6	\$10,006
8	Widget Corporation-Replacement Parts	TechONE System	7	80000	Custom Field info 7	\$10,007
9	Widget Corporation-Replacement Parts	Service Contract	8	3500	Custom Field info 8	\$10,008
10	Boomer's Artworx	TechONE System	9	99000.99	Custom Field info 9	\$10,009
11	Boomer's Artworx	Service Contract	10	2500.88	Custom Field info 10	\$10,010
12						

This example includes 2 optional custom product fields: Test1 and Test2



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Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 15\Samples\Products_for_Opportunities_16.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

Password:

Select

Products for Opportunities

Merge Rules

ACT! Table: ↔ Select a Target Table

Delimited File (csv or txt) Table:

Merge Source	ACT! Fields
<input type="text"/>	<input type="text"/>

- Groups
- Companies
- Contacts
- History
- Notes
- Activities
- Opportunities
- Products
- Products for Opportunities**
- Users
- Secondary Contacts



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Map the info.

Merge Rules

ACT! Table: Products for Opportunities

Delimited File (csv or txt) Table: CSV Table

Merge Source	Source Field or Value	ACT! Fields	Data Type	Required
Source Table Column	Name of OPP for LINKING	Link To: Opportunities by Opportunity Name	String	
Source Table Column	Product Name for LINKING	Link To: Products by Name	String	
Source Table Column	Price	Price	Decimal	
Source Table Column	Quantity	Quantity	Decimal	
Source Table Column	Desc-Test	TEST 1	String	
Source Table Column	Test Number as Text	Test 2	String	

Run the merge and get the results; It is an append only merge. No matching to find and update info.



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Review Merge Results

Importing table Products for Opportunities from CSV Table.
If you have ACT! open, you may need to refresh the current view to see updated data.

Initial import numbers:	Rows in source table	10
	Rows in target table	0

Import for table Products for Opportunities has completed successfully.

After import numbers:	Total rows processed	10
	Rows in target table	10
By Status:	Rows processed successfully	10
	Rows processed with warnings	0
	Rows skipped due to errors	0
Merged rows summary:	Added to target	10
	Updated in target	0
	Deleted from target	0
	Skipped in source	0
	Duplicates in source	0

Additional details: Execution time: 1 sec

In Act!, the products are added to the opportunity

The screenshot shows the Act! software interface for an opportunity record. The opportunity name is "Test_Opp_Name_c101". The status is "Open" and the process is "CHT1 Sales". The table below lists the products and services associated with this opportunity:

Name	Item #	Quantity	Cost	Price	Adjusted Price	Discount	Subtotal	TEST 2	TEST 1
TechONE System	T1SYS	1.00	\$5,000.00	\$50,000.00	\$50,000.00	0.0000000000%	\$50,000.00	\$10,001	Custom Field info 1
ONE Component	ONE	2.00	\$1,000.00	\$350.00	\$350.00	0.0000000000%	\$700.00	\$10,002	Custom Field info 2
ONE Component	ONE	3.00	\$1,000.00	\$355.00	\$355.00	0.0000000000%	\$1,065.00	\$10,003	Custom Field info 3
Service Contract	SC	4.00	\$750.00	\$4,000.00	\$4,000.00	0.0000000000%	\$16,000.00	\$10,004	Custom Field info 4
Service Contract	SC	5.00	\$750.00	\$299.00	\$299.00	0.0000000000%	\$1,495.00	\$10,005	Custom Field info 5



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Fields available for mapping include any custom product fields.

	ACT! Fields	Data Type	Re
▼ ×	Link To: Opportunities by Opportunity Name	String	
▼ ×	Link To: Opportunities by ACT! GUID	String	
▼ ×	Link To: Products by Name	String	
▼ ×	Link To: Products by Item Number	String	
▼ ×	Link To: Products by ACT! GUID	String	
▼ ×	Cost	Decimal	
▼ ×	Price	Decimal	
▼ ×	Discount	Decimal	
▼ ×	Quantity	Decimal	
▼ ×	TEST 1	String	
▼ ×	Test 2	String	
▼ ×	Type	String	

If Opportunities have a custom field called OAKMergeID, then that is a 3rd option for LINKING products to the Opportunity.

	ACT! Fields	Data Type	Re
▼ ×	Link To: Opportunities by Opportunity Name	String	
▼ ×	Link To: Opportunities by ACT! GUID	String	
▼ ×	Link To: Opportunities by OAKMergeID	String	
▼ ×	Link To: Products by Name	String	
▼ ×	Link To: Products by Item Number	String	
▼ ×	Link To: Products by ACT! GUID	String	
▼ ×	Cost	Decimal	
▼ ×	Price	Decimal	
▼ ×	Discount	Decimal	
▼ ×	Quantity	Decimal	
▼ ×	Type	String	



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TIP: To use the GUID for linking or updating, you would need to create the opportunities, then export them using OAK!Merge to expose the Opportunity GUIDs

GUIDs are used in Contacts, Companies, Groups, Opportunities, Notes, History, and Products.

Example 10: Using an ACCESS database as a Source

Pick MS ACCESS DATABASE as the source

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type	Delimited File (csv or txt)
File	ACT! Delimited File (csv or txt) MS Excel 2000-2003 (xls) MS Excel 2007-2010 (xlsx)
Delimiter	MS Access 2000-2003 Database (mdb) MS Access 2007-2010 Database (accdb)

MERGE DESTINATION

Type	ACT!
ACT! PAD File	C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad
User Id	
Password	

ACCESS 2003, 2007, 2010 or 2016 is supported if the necessary Microsoft Office drivers are loaded. Access does not need to be installed to have the free run time drivers installed. See Appendix 7 for more info.



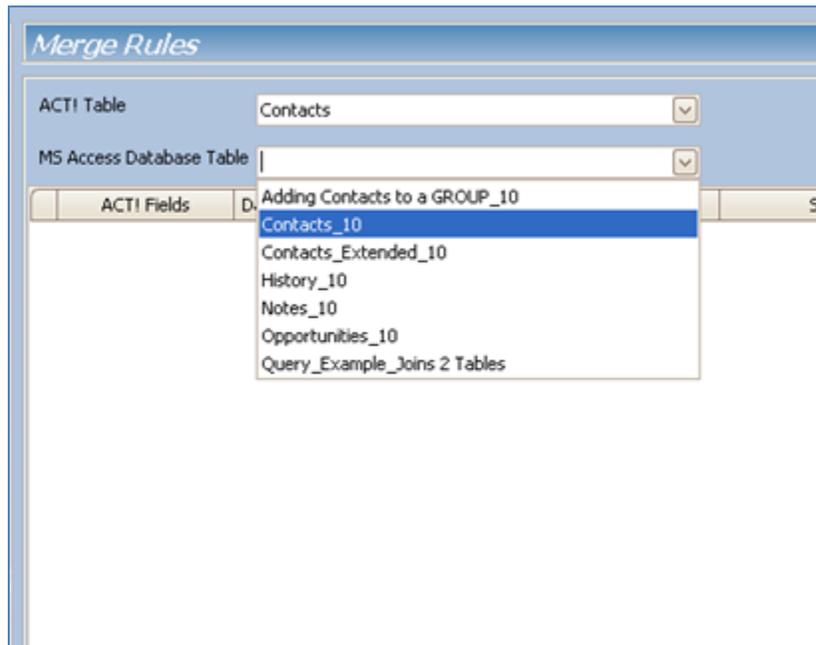
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TIP: : User ID/Password is often not required for **Act!** or ACCESS.

Select your Source Table or Query



and continue merge as other merge examples.

TIP: : An ACCESS query may include a table connected to an external data source like a SQL server or may have joins that pull selected data from several tables. Fresh data will be extracted each time OAK!Merge opens and runs.



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Example 11: Act! Activities Merge - Simple

A simple merge of activities is the sample file: Activities_Simple_11_1.csv
The Advanced version of **OAK!Merge** supports merges to the **Act!** Activity table.

	A	B	C	D	E
1	Contact	Type	Regarding	Start Time	
2	Sean Duffy	Call	Test_Activity_Regarding_01	1/1/2010 8:01	
3	Sean Duffy	Meeting	Test_Activity_Regarding_02	1/2/2010 11:00	
4	Sean Duffy	To-do	Test_Activity_Regarding_03	1/3/2010 16:00	
5	Sean Duffy	Vacation	Test_Activity_Regarding_04	1/4/2010 21:00	
6					
7					

Pick type as delimited file

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type:

File:

Delimiter:

First Row Contains Field Names

MERGE DESTINATION

Type:

ACT! PAD File:

User Id:

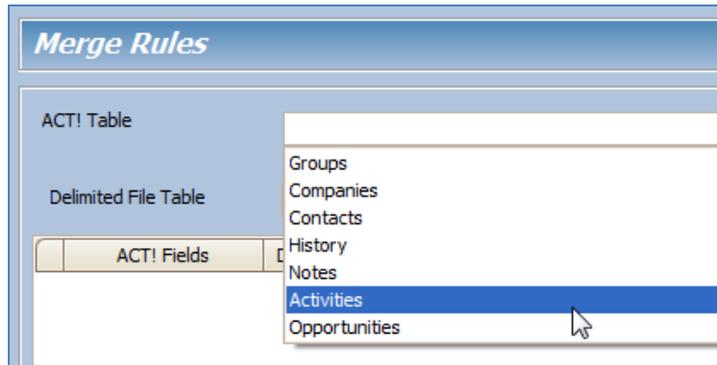
Password:



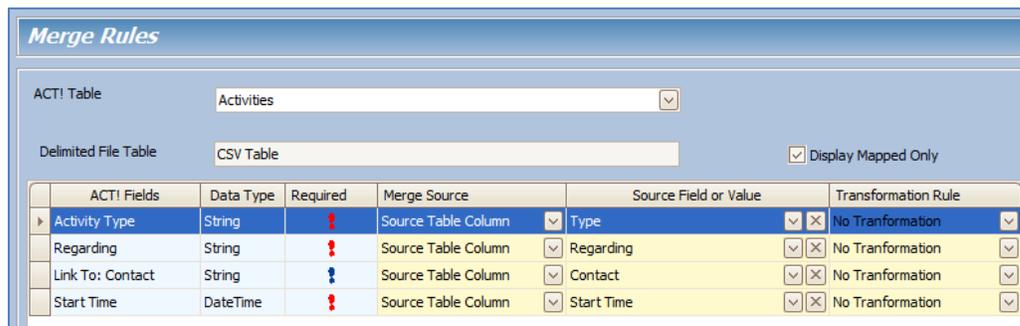
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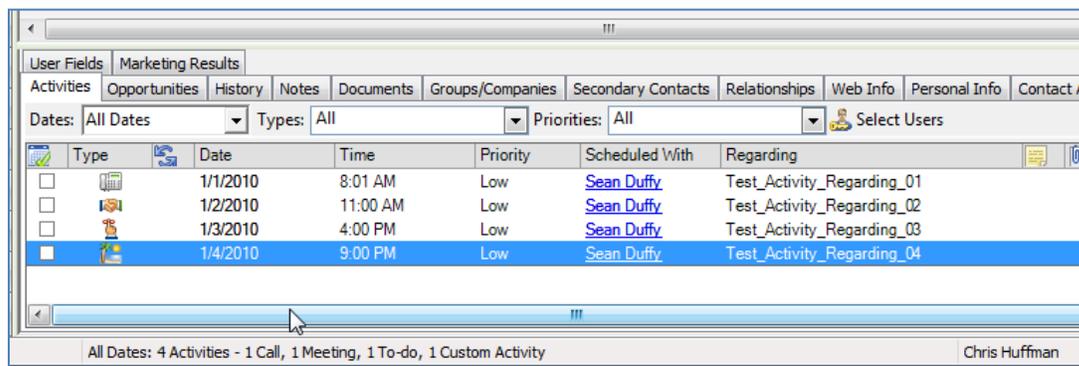
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Map as shown



Results in Act! are on the Calendar, Task List, and Activities TAB.



TIP: All the above activities are "scheduled for" the user name used by



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OAK!Merge to log into the database. See below to specify different "Scheduled For" users.



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Example 12: Act! Activities Merge - Complex

The sample file is Activities_Complex_12_2.csv

	A	B	C	D	E	F	G	H	I	J
1	Contact	Company	Type	Regarding	Start Time	End Time	Use all day banner	Lead Minutes	Is Alarmed	Details
2	Sean Duffy	Circle Photograp	Call	Test_Activity_Regarding_01	1/1/2010 8:01				30 Yes	This is a note
3	Sean Duffy	Circle Photograp	Meeting	Test_Activity_Regarding_02	1/2/2010 11:00	1/2/2010 14:00				Test 2
4	Sean Duffy	Circle Photograp	To-do	Test_Activity_Regarding_03	1/3/2010 16:00					
5	Sean Duffy	Circle Photograp	Vacation	Test_Activity_Regarding_04	1/4/2010 9:00	1/6/2010 9:00	Yes			Yahoo

Delimited File – Source

IMPORT SOURCE

Type:

File:

Delimiter:

First Row Contains Field Names

MAP as shown

Merge Rules

ACT! Table:

Delimited File (csv or txt) Table:

Display Mapped Only

Merge Source	Source Field or Value	ACT! Fields	Data Type	Required	Transformation Rule
>	Source Table Column > Contact	Link To: Contacts by Full Contact Name	String		No Transformation
	Source Table Column > Type	Activity Type	String	!	No Transformation
	Source Table Column > Regarding	Regarding	String	!	No Transformation
	Source Table Column > Details	Details	String		No Transformation
	Source Table Column > Start Time	Start Time	DateTime	!	No Transformation
	Source Table Column > Is Alarmed	Is Alarmed	Boolean		No Transformation
	Source Table Column > Use all day banner	Use All Day Banner	Boolean		No Transformation
	Source Table Column > Lead Minutes	Lead Minutes	Int32		No Transformation



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Complete Run

Ready to Run

EXECUTION OPTIONS

- Validate
- Test Run: limit to
- Complete Run

Merged rows summary:	Added	4
	Updated	0
	Deleted	0

Using company will add the activity to all contacts at that company.

General

Details

Recurrence

Availability

Options

Activity Type: Vacation Start Date: 1/4/2010 Start Time: 9:00 AM Duration: 2 days

End Date: 1/6/2010 End Time: 9:00 AM Use Banner

Schedule With: Duffy, Sean [Circle Photography]; Jenkins, Jonathan [Circle Photography] Contacts



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Regarding:
Test_Activity_Regarding_01

Resources: None Location:

Priority: Low Color: [Black] Ring Alarm: 30 minutes

Private

TIP: : You can schedule Act! Activities for various Act! Users.

Just map their user name to the Record Manager field in the mapping section. If no user (or an unknown user) is specified; then the user logged in to do the merge from screen one is used. See the tip below for more on the defaults
Steps:

Add the user's name you want the activities scheduled for in a column

	A	B	C	D	E
1	Contact	Type	Regarding	Start Time	SCH_FOR
2	Sean Duffy	Call	Test_Activity_Regarding_01	1/1/2010 8:01	Fred Fenderline
3	Sean Duffy	Meeting	Test_Activity_Regarding_02	1/2/2010 11:00	Ernst Anderson
4	Sean Duffy	To-do	Test_Activity_Regarding_03	1/3/2010 16:00	Fred Fenderline
5	Sean Duffy	Vacation	Test_Activity_Regarding_04	1/4/2010 21:00	Ernst Anderson

Above file is in the samples folder: Activities_Simple_Plus_Users_14_5.csv



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Then map the new column to the record manager

Merge Rules

ACT! Table:

Delimited File (csv or txt) Table:

Display Mapped Only

Merge Source	Source Field or Value	ACT! Fields	Data Type	Required	Transformation Rule
> Source Table Column	Contact	Link To: Contacts by Full Contact Name	String		No Transformation
Source Table Column	Type	Activity Type	String	!	No Transformation
Source Table Column	Regarding	Regarding	String	!	No Transformation
Source Table Column	Details	Details	String		No Transformation
Source Table Column	Start Time	Start Time	DateTime	!	No Transformation
Source Table Column	Is Alarmed	Is Alarmed	Boolean		No Transformation
Source Table Column	Use all day banner	Use All Day Banner	Boolean		No Transformation
Source Table Column	Lead Minutes	Lead Minutes	Int32		No Transformation

Gives you activities scheduled for different Act! users to complete

Type	Date	Time	Priority	Scheduled With	Regarding	Scheduled For
<input checked="" type="checkbox"/>	1/1/2010	8:01 AM	Low	Sean Duffy	Test_Activity_Regarding_01	Fred Fenderline
<input type="checkbox"/>	1/2/2010	11:00 AM	Low	Sean Duffy	Test_Activity_Regarding_02	Ernst Anderson
<input type="checkbox"/>	1/3/2010	4:00 PM	Low	Sean Duffy	Test_Activity_Regarding_03	Fred Fenderline
<input type="checkbox"/>	1/4/2010	9:00 PM	Low	Sean Duffy	Test_Activity_Regarding_04	Ernst Anderson

TIP: Be careful mapping Scheduled With vs Scheduled For. Scheduled With is set via the LINK TO mapping whereas Scheduled For is set by mapping the record manager. They are both set to something for each activity.

For new activities the "scheduled with" is set to whatever the activity is LINKED to. It will be defaulted to the RECORD MANAGER if there is no LINK to data for a contact, company, group, or opportunity. If there is no data for RECORD MANAGER; then the "my record" of the user doing the OAK!Merge import will be used for the Scheduled with.

For new activities the "scheduled for" is set to user mapped as Record Manager. If no record manager is mapped or the data is invalid, then the "scheduled for" is set to the Act! user doing the OAK!Merge import.



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OAK!Merge does not let you specify the Scheduled BY. It is always set to the Act! user doing the OAKMerge import.

Support for recurring activities parameters is available for export. only. The Start_Time is what is displayed in Act! as the date for the next occurrence of the recurring activity in Act! There are 3 extra read only fields involved: the Recur_Start_Time is the original start Date/time used when the recurring activity was created.

START_TIME	DateTime
END_TIME	DateTime
RECUR_PERIOD	String
RECUR_START_TIME	DateTime
RECUR_END_TIME	DateTime

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	RECORD_CONTACT_NAME	REGARDIN DETAILS											START_TIME	END_TIME	RECUR_PERIOD	RECUR_START_TIME	RECUR_END_TIME	EXTERN
1	Melissa Pearce	fd540a2d-a131- CI M Staff Meeting											10/4/2012 8:00	10/4/2012 9:00	Weekly	9/6/2012 8:00	9/6/2012 9:00	
3	Juliette Rosseux	6ad0e080-b19b- CI M Birthday Lunch											10/16/2012 11:30	10/16/2012 13:00	Yearly	10/16/2012 11:30	10/16/2012 13:00	
4	Juliette Rosseux	6ad0e080-b19b- Er M Year End Budget Mei											12/3/2012 10:00	12/3/2012 14:00	None	12/3/2012 10:00	12/3/2012 14:00	
5	Juliette Rosseux	6ad0e080-b19b- CI M Birthday Lunch											10/16/2013 11:30	10/16/2013 13:00	Yearly	10/16/2012 11:30	10/16/2012 13:00	
6	Juliette Rosseux	6ad0e080-b19b- CI M Birthday Lunch											10/16/2014 11:30	10/16/2014 13:00	Yearly	10/16/2012 11:30	10/16/2012 13:00	
7	Juliette Rosseux	6ad0e080-b19b- CI M Birthday Lunch											10/16/2015 11:30	10/16/2015 13:00	Yearly	10/16/2012 11:30	10/16/2012 13:00	
8	Betty Browser	6689d53a-6fc8- CI M AsiaPac S: (\rtf1\an											8/13/2012 16:00	8/13/2012 17:00	Weekly	8/10/2012 16:00	8/10/2012 17:00	
9	Betty Browser	6689d53a-6fc8- CI M Sales Training											10/8/2012 13:00	10/8/2012 17:00	None	10/8/2012 13:00	10/8/2012 17:00	
10	Betty Browser	6689d53a-6fc8- CI M Sales Training											10/16/2012 13:00	10/16/2012 17:00	None	10/16/2012 13:00	10/16/2012 17:00	
11	Sarah Whiting	d9c02dc2-3b07- CI C: European (\rtf1\an											7/24/2009 8:30	7/24/2009 10:00	None	7/24/2012 8:30	7/24/2012 10:00	

The Recur_Period is a text field such as Weekly or Monthly or None. It does **not** include parameters such as the period: 3rd Friday of the month and do it every 4 months.

Start_Time and End_Time are Date/Time fields for both regular activities, and the next occurrence of recurring activities.

An Activities export will have a row for each time a recurring activity was cleared. The isCleared column will be True. This same info for cleared activities is also created in the History table.

Below shows one recurring activity has been cleared so far and



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For example,

Here is 2 rows in a custom table where the data was imported from a CSV and linked to a contact and company; one each. Then Exported back out.

	A	B	C	D	E	F	G	H	I	J	K
1	CREATEDATE	CUST_DatePurchase	CUST_DateWarrant	EDITDATE	CUST_EqipNotes	11EDITUSERNAME	ISPRIVATE	CREATEUSERNAME	MANAGERUSERNA	CUST_Record_ID	byCUST_SystemName
2	3/31/2022 11:58	3/21/2022	6/21/2022	3/31/2022 11:58	on a COMPANY, no	Chris Huffman	FALSE	Chris Huffman	Chris Huffman	Custom_Table_ID_00	Router
3	3/31/2022 11:56	11/1/2019	11/1/2020	3/31/2022 11:56	warranty expired a	Chris Huffman	FALSE	Chris Huffman	Chris Huffman	Custom_Table_ID_00	LEXUS RX350 lamp
4											

The export was

	K	L	M	N	O	P	Q	R	S	T	U	V	
1	CUST_SystemName	CUST_WarrantyPri	RECORD_CONTACT	RECORD_CONTACT	RECORD_COMPANY	RECORD_COMPANY	RECORD_OPPORTU	RECORD_OPPORTU	RECORD_GROUP	RECORD_GROUP	GI	RECORD_USER	RECORD_ID
00	Router	0			Ace Pet Store Franc	a0233459-8cb1-4889-a924-bfb1b06a2f89						Chris Huffman	b9a483ee-8a61-4b2d-bbce-8c
00	LEXUS RX350 lamp	123.45	Andy Harrison	70a253f1-17a3-4774-a31e-3c0c3ff401cc								Chris Huffman	a4a6b5fb-134c-435e-89f0-926

Transposing the export to vertical rows you get:

	A	B	C	D	E
1	CREATEDATE		3/31/2022 11:58	3/31/2022 11:56	
2	CUST_DatePurchased_114350821		3/21/2022	11/1/2019	
3	CUST_DateWarrantyEnds_114434576		6/21/2022	11/1/2020	
4	EDITDATE		3/31/2022 11:58	3/31/2022 11:56	
5	CUST_EqipNotes_114554197		on a COMPANY, no contact	warranty expired and has cents	
6	EDITUSERNAME		Chris Huffman	Chris Huffman	
7	ISPRIVATE		FALSE	FALSE	
8	CREATEUSERNAME		Chris Huffman	Chris Huffman	
9	MANAGERUSERNAME		Chris Huffman	Chris Huffman	
10	CUST_Record_ID_byALAN_114301023		Custom_Table_ID_0005	Custom_Table_ID_0004	
11	CUST_SystemName_114014666		Router	LEXUS RX350 lamp	
12	CUST_WarrantyPrice_114510044		0	123.45	
13	RECORD_CONTACT_NAME			Andy Harrison	
14	RECORD_CONTACT_GUID			70a253f1-17a3-4774-a31e-3c0c3ff401cc	
15	RECORD_COMPANY_NAME		Ace Pet Store Franchises		
16	RECORD_COMPANY_GUID		ad233459-8cb1-4889-a924-bfb1b06a2f89		
17	RECORD_OPPORTUNITY_NAME				
18	RECORD_OPPORTUNITY_GUID		sample record 1 is linked to only a company	sample record 2 is linked to only a Contact	
19	RECORD_GROUP				
20	RECORD_GROUP_GUID				
21	RECORD_USER		Chris Huffman	Chris Huffman	
22	_RECORD_ID_		b9a483ee-8a61-4b2d-bbce-8cdfc3025001	a4a6b5fb-134c-435e-89f0-926a92109a37	
23					
24					
25					

If you need to have sub tables, you need to create and manage the linking IDs yourself. Create an RowID field in the parent custom table. Create and add unique data to each RowID field.

In the sub table, create a Link to ParentID field. In each row, add the data for the appropriate RowID from the parentID table for that row.

A one to many relationship is supported, because you can have many rows in the



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sub table with the same RowID. An use case could be a custom table for Equipment Sold to a customer. The sub table could be service calls or software updates for each specific piece of equipment.



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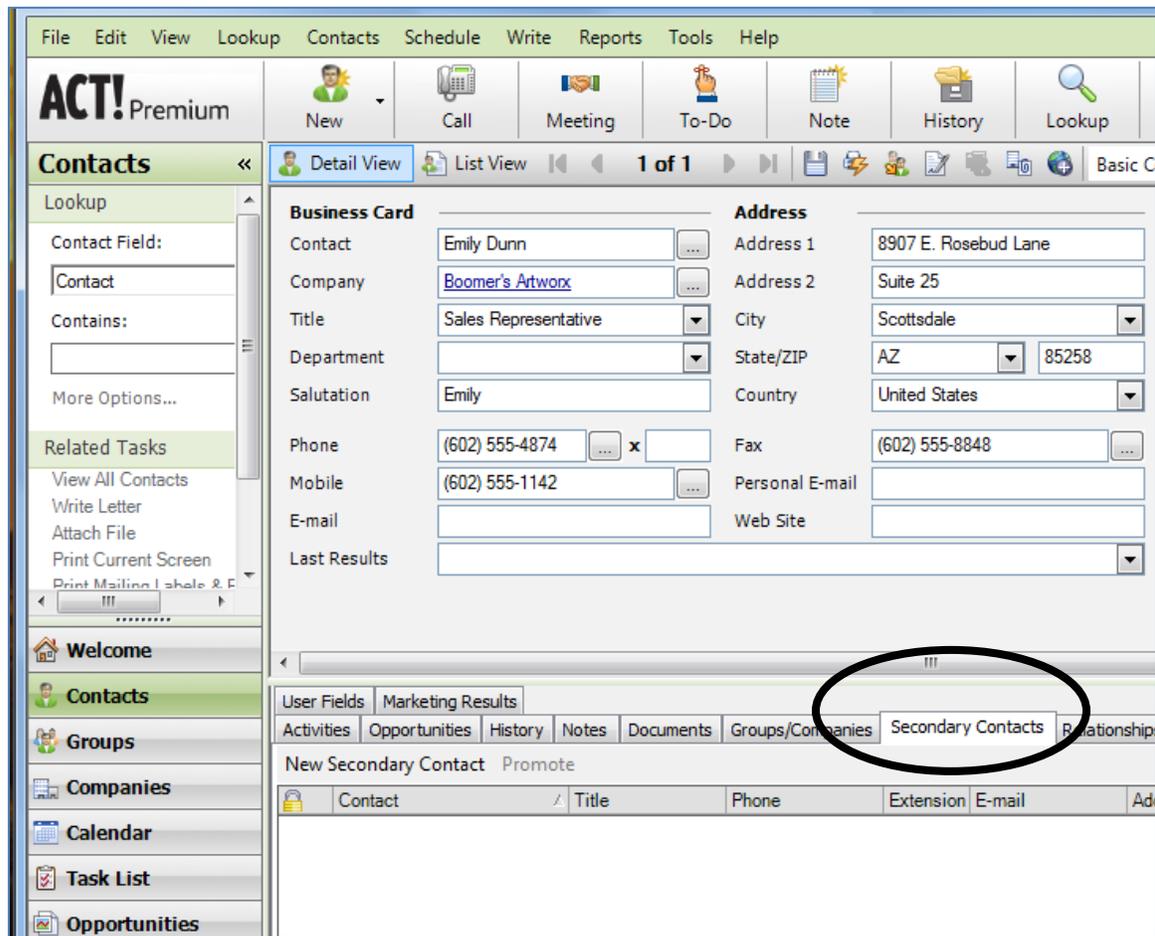


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Example 14: Secondary Contact Merges and Exports

To add Contacts / data to the Secondary Contacts tab use the Pro version to merge or export the secondary contacts table. You link to a primary contact and company using the Contact Name OR Contact Name PLUS Company. You cannot link secondary contacts to primary contacts based on other fields.

The Secondary Contacts became exportable in v22



A sample file is in the **OAK!Merge** samples folder called: Secondary_Contacts_12.csv



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	A	B	C	D	E	F	G	H	I	J	K	L
1	Primary_Contact	Primary_Contact_Company	Contact	Company	Phone	Title	Address Line 1	Address Line 2	City	State	ZIP	end
2	Emily Dunn	Boomer's Artworx	Jack Mert	IBM	(602) 555-	Sales Rep	8907 E. Rosebud	Suite 25	Atlanta	GA	22222	end
3	Emily Dunn	Boomer's Artworx	Linda Carl	GM		Sales Rep	8907 E. Rosebud	Suite 25	Detroit	MI	33333	end
4	Emily Dunn	Boomer's Artworx	Adam Poe									end
5	Emily Dunn	Boomer's Artworx	Joe Gladn	SIEMENS								end
6	Emily Dunn	Boomer's Artworx	Paul Shan	TOYOTA	310-622-1-	QA Manag	2000 Santa Monica Frwy		Los Angel	CA	90029	end
7	Emily Dunn	Boomer's Artworx	Jimmy Gingerich									end
8	Bettie James	Boomer's Artworx	Heather B	CNN	310-622-1501		4000 Santa Monica Frwy		Los Angel	CA	90029	end
9	Bettie James	Boomer's Artworx	Philip Lon	SEARS		Consultan	16 N. Deville Dr. Suite 40		Tempe	AZ	85281	end
10	Bettie James	Boomer's Artworx	Tammy Dr	US PATEN	(310) 555-	Analyst	22 First Ave.		New York	NY	11111	end
11	Bettie James	Boomer's Artworx	Bill Griffin	Univ of XYZ							92109	end

Start a new merge and pick delimited file as import source and the Merge Destination as the **Act!** Demo database.

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 15\Samples\Secondary_Contacts_12.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

Password:

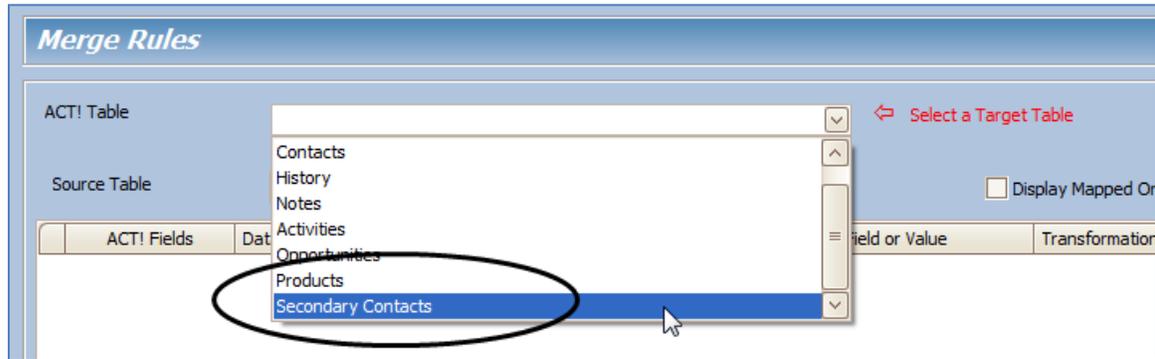
Select Secondary Contacts as the **Act!** table to merge to.



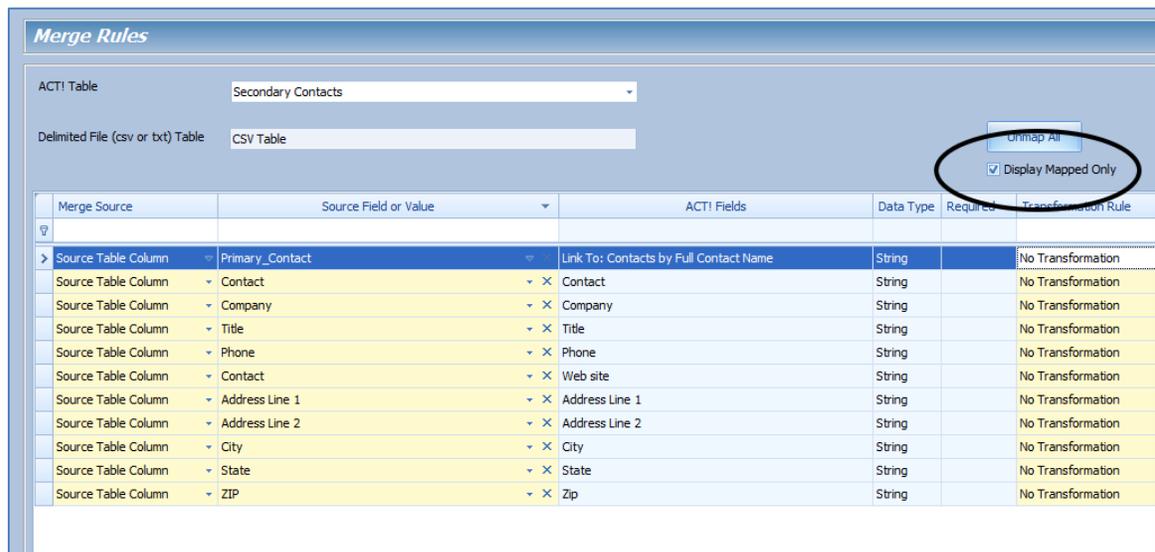
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Check the "Display mapped only" box to condense list. The primary_company and end field does not need to be mapped.



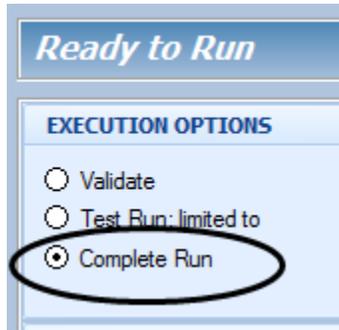
Use complete Run to write the info. Validate / Preview does NOT write anything to **Act!**



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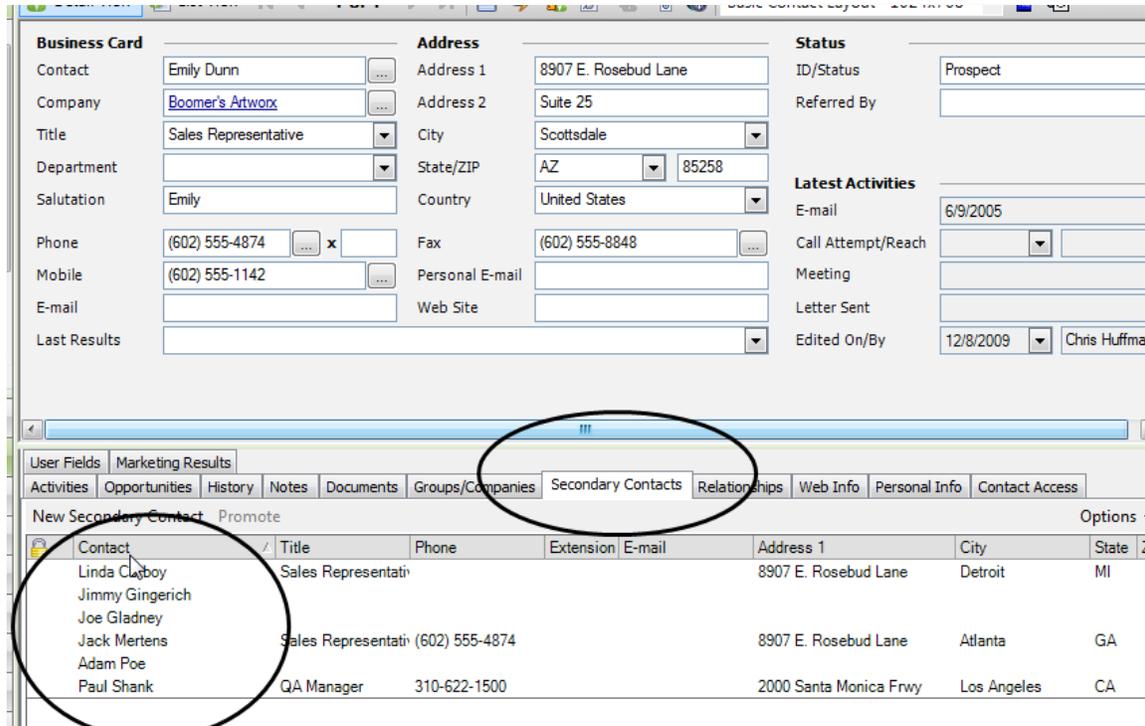


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The results show edited, added and elapsed time.

The new secondary contacts show up on the Secondary contacts tab IF the Primary Contact exists. If no match is found for the Contact/Company the contact gets added to the **Act!** my record for the user doing the merge. If the Contact is blank, the row is skipped.





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Example 15: Act! User Merges

To add Act! users or transfer Act! users from one Act! data base to another use the Pro version of OAK!Merge. You can import a list of names to create the my records and Act! User accounts. Input fields include the Contact Name and User Name. Note the GUID is not transferred when doing an Act! to Act! merge. The user name can be used by OAK!Merge to set the record manager in other merges.

The sample file is User_12.csv

ContactName	Password	UserName	Role	Status
Jane Jones	Red	JJ	Administrator	Active
Tom Smith	Test	tSmith	Manager	Active
Cindy		Cindy	Standard	Active
Temp Employee	password	temp	Browse	Inactive
John Evans		JE		Inactive
Carl Jones		CJ		Inactive



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Sample Merge of Users from a CSV

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\Oak!Merge 15\Samples\Users_12.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

Password:

Users table is the target

Merge Rules

ACT! Table:

Source Table:

ACT! Fields:

- Groups
- Companies
- Contacts
- History
- Notes
- Activities
- Opportunities
- Products
- Users**
- Secondary Contacts



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Mapping

You can select fields to match on if you need to update other fields

Merge Rules

ACT! Table:

Delimited File (csv or txt) Table:

Display Mapped Only

Merge Source	Source Field or Value	Mat...	ACT! Fields	Data T...	Required	Transformation Rule
> Source Table Column	UserName	<input checked="" type="checkbox"/>	User Name	String	<input checked="" type="checkbox"/>	No Transformation
Source Table Column	Password	<input type="checkbox"/>	Password	String	<input type="checkbox"/>	No Transformation
Source Table Column	ContactName	<input type="checkbox"/>	Contact Name	String	<input checked="" type="checkbox"/>	No Transformation
Source Table Column	Role	<input type="checkbox"/>	Role	String	<input type="checkbox"/>	No Transformation
Source Table Column	Status	<input type="checkbox"/>	Status	String	<input type="checkbox"/>	No Transformation
Source Table Column		<input type="checkbox"/>	Record ID (ACT! GUID)	String	<input type="checkbox"/>	No Transformation

The Record ID (Act! GUID) is NOT updateable. You can use it to match on to find and update an existing User Record. Export the table to get the GUIDs.

Review Merge Results

Importing table Users from CSV Table.
If you have ACT! open, you may need to refresh the current view to see the results.

Initial import numbers:	Rows in source table	6
	Rows in target table	9

Import for table Users has completed successfully.

After import numbers:	Rows in target table	15
	Total rows processed	6
By Status:	Rows processed successfully	6
	Rows processed with warnings	0
	Rows skipped due to errors	0
Merged rows summary:	Added	6
	Updated	0
	Deleted	0
	Skipped	0
	Duplicates	0

Additional details: Execution time: 2 sec 520 msec



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In Act! you get new contacts and user accounts

Manage Users

Back Forward Home

User Tasks

- Create New User
- Edit User Information
- Delete User

Details

There are enough licenses for 5 active users in this database.

Select a User

Select a user to change passwords, security roles, and other settings.

Contact Name	User Name	Security Role	Log On Status	Last Logon
Allison Mikola	Allison Mikola	Manager	Inactive	4/16/2008 10:19
Betty Browser	Betty Browser	Browse	Inactive	
Carl Jones	CJ	Standard	Inactive	
Chris Huffman	Chris Huffman	Administrato	Active	6/13/2010 8:57 F
Cindy	Cindy	Standard	Active - Pending	
Ernst Anderson	Ernst Anderson	Standard	Inactive	4/18/2008 12:59
Fred Fenderline	Fred Fenderline	Standard	Inactive	
Jane Jones	JJ	Administrato	Active - Pending	
John Evans	JE	Standard	Inactive	
Jonathan Somm	Jonathan Somm	Standard	Inactive	
Juliette Rosseu	Juliette Rosseu	Restricted	Inactive	4/8/2008 11:33 F

You have enough licenses for 4 additional active users.

Close



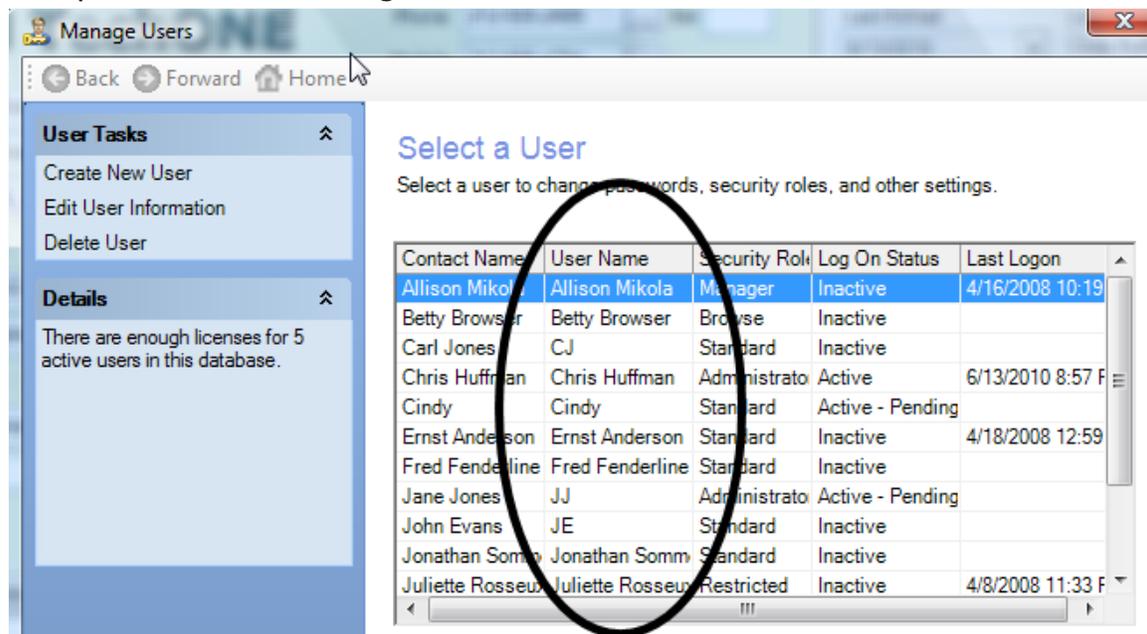
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Example 16: Setting the record manager

All the editions of OAK!Merge (BASIC to PRO) versions 12.3.0 or later allow you to set the record manager. Use the User Name, not the contact name. See the example below on OAKMergeID



Example 17: Using the OAKMergeID field for linking History, Notes, etc.. to Contacts

OAK!Merge Version 12.4.0 and later supports linking history, notes, etc. to Contacts, Companies, and/or Opportunities via a special field instead of the Contact Name, Company Name, or Opportunity Name

Previous versions support Linking only by Contact Name, Company Name, or Opportunity Name. This is to link a history, note, activity record, or custom table record to a contact, company, or opportunity.

To use this feature, create a field called OAKMergeID as a text field. You can then populate it with any text or numbers you wish to use to link on. A typical example is a unique contact ID number you can put in each contact and the associated history records you wish to append and link.



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Use Tools, Define Fields in Act! to add the custom field OAKMergeID. You can create an OAKMergeID field in any or all of Companies, Contacts, or Opportunities tables

Define Fields

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Enter field name and type

For each field you create or edit, you can select options to describe and specify how the field functions.

Field name:
OAKMergeID

Field data type:
Character

Customize field behavior

Allow Blank - This field can accept empty values

Step 1 Merge the Contacts with OAKMerge IDs 12 4.csv to populate the OAKMergeID

Company	Contact	Phone	Title	Address1	Address2	City	State	ZIP	OAKMergeID	YTD_SALE	AR Balanc	Credit Lim
Boomer's	Emily Dun	(602) 555-	Sales Rep	8907 E. Ro	Suite 25	Scottsdale	AZ	85258	A_0023	0		1000
Boomer's	Bettie James		Sales Rep	8907 E. Ro	Suite 25	Scottsdale	AZ	85258	A_0024	100	500	2000
Corleone'	Morty Mai	(480) 555-	Director o	8800 Past	Suite 200	Scottsdale	AZ	85258	A_0025	1000		5000
Duke Indu	Nathan Cu	310-622-1507		4075 Santa	Monica Fi	Los Angel	CA	90029	A_0026	400000	20000	50000
Duke Indu	Marion Mi	310-622-1501	Founder	4075 Santa	Monica Fi	Los Angel	CA	90029	A_0027	500000		50000
Duke Indu	Kirby York	310-622-1506		4075 Santa	Monica Fi	Los Angel	CA	90029	A_0028	600000		50000
Duke Indu	Ethan Edw	310-622-1501		4075 Santa	Monica Fi	Los Angel	CA	90029	A_0029	700000		50000
Jake Flake	Bella Minoal		Consultan	1680 N. De	Suite 40	Tempe	AZ	85281	A_0030	800000		50000
Mad Hous	Greg Hart	(310) 555-	President	22 Acacia	Ave.	Manhatta	CA	90266	A_0031	900000		50000
Yellow Jer	Ashley All	(619) 555-	VP of Sale	315 Cente	Suite 100	San Diego	CA	92109	ZZZ_ASHLEY	4000000	60000	2000000



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Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 15\Samples\Contacts_WITH_OAKMergeIDs_12_4.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

Password:



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In this example we matched on 3 fields and updated only the OAKMergeID custom field to populate the OAKMergeID field in Contacts. That makes it available for Linking history, for example, to contacts.

Merge Rules

ACT! Table:

Delimited File (csv or txt) Table:

Merge Source	Source Field or Value	Matching Fields	ACT! Fields	Data Type	Required	Transform
Source Table Column	Contact	<input checked="" type="checkbox"/>	Contact	String	<input checked="" type="checkbox"/>	No Transform
Source Table Column	Company	<input checked="" type="checkbox"/>	Company	String	<input checked="" type="checkbox"/>	No Transform
Source Table Column	Address1	<input checked="" type="checkbox"/>	Address 1	String	<input checked="" type="checkbox"/>	No Transform
Source Table Column	Address2	<input checked="" type="checkbox"/>	Address 2	String	<input checked="" type="checkbox"/>	No Transform
Source Table Column	OAKMergeID	<input type="checkbox"/>	OAKMergeID	String	<input type="checkbox"/>	No Transform

MERGE RULES (related to matching)

If a Match is Found: If a Match is NOT Found:



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Step 2: Merge the History linking on OAKMergeID
Use History_12_4_WITH_OAKMergeID csv Link on the OAKMergeID, not the company and contact

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 15\Samples\History_12_4_WITH_OAKMergeIDs.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

Password:

Company	Contact	TYPE	Start_Time	Regarding	Details	OAKMergeID	Record_Manager
Boomer's	Emily Dun	Attachment	7/1/2001	C:\E Tech	see attach	A_0023	Chris Huffman
Boomer's	Emily Dun	CallCompleted	7/2/2001	Phone cal	Windy	A_0023	Ernst Anderson
Boomer's	Emily Dun	CallCompleted	7/3/2001	Phone cal	Regional	A_0023	Ernst Anderson
Yellow Jer	Ashley All	CallCompleted	7/4/2001	Called and left a me		ZZZ_ASHLEY	Ernst Anderson
Yellow Jer	Ashley All	MeetingHeld	7/5/2001	Met a Hilt	Ashley, Jc	ZZZ_ASHLEY	Betty Browser
Yellow Jer	Ashley All	ToDoDone	7/6/2001	Sent prop	Quoted n	ZZZ_ASHLEY	Betty Browser



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Mapping: Link to Contacts by OAKMergeID

Merge Rules						
ACT! Table	History					
Delimited File (csv or txt) Table	CSV Table					
Merge Source	Source Field or Value	ACT! Fields	Data Type	Required	Tran	
> Source Table Column	OAKMergeID	Link To: Contacts by OAKMergeID	String			No T
Source Table Column	Record_Manager	Record Manager (Name, Login or GUID)	String			No T
Source Table Column	TYPE	History Type	String	!		No T
Source Table Column	Regarding	Regarding	String	!		No T
Source Table Column	Details	Details	String			No T
Source Table Column	Start_Time	Start Time	DateTime	!		No T

Results in Act! are:

Review Merge Results			
Importing table History from CSV Table.			
If you have ACT! open, you may need to refresh the current view to see updated data.			
Initial import numbers:	Rows in source table	6	
	Rows in target table	0	
Import for table History has completed successfully.			
After import numbers:	Total rows processed	6	
	Rows in target table	6	
By Status:	Rows processed successfully	6	
	Rows processed with warnings	0	
	Rows skipped due to errors	0	
Merged rows summary:	Added to target	6	
	Updated in target	0	
	Deleted from target	0	
	Skipped in source	0	
	Duplicates in source	0	
Additional details:	Execution time:	1 sec	
All Rows Processed Completely			



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CH ONE CH TechONE

Phone (602) 555-4874 Ext.
 Mobile (602) 555-1142
 Fax (602) 555-8848
 E-mail
 Contact Emily Dunn
 Salutation Emily
 Company Boomer's Artworx
 Key Contact
 Title Sales Representative
 Department
 ID/Status Prospect
 Referred By

Web Site
 OAKMergeID A_0023
 Address 6007 E. Rosebud Lane
 Suite 25
 City Scottsdale
 State/ZIP AZ 85258
 Country United States

Last Edited 6/13/2010 Last Edited by Chris Huffman
 Last Reach 6/9/2005 Last E-mail
 Last Meeting Last Letter
 Last Years Purchases
 First Purchase Customer ID A_0023
 Trivia

Notes History **Activities** Opportunities Groups/Companies Secondary Contacts Relationships Documents Web Info Contact Access User Fields Personal Info

Date: All Dates Types: All Select Users

Date	Time	Result	Regarding & Details	Record Manager	Share
7/3/2001	12:00 AM		Resources page for Boat Licenses, Permits, Registration & other information. Resources include: online registration, PDF forms, and more.	Ernst Anderson	
7/2/2001	12:00 AM	Call Completed	Phone call - on sales of a new boat with a long description of the contents Windy City Yacht Brokerage, LLC was founded by Jeff Pierce in 2004 to bring the very highest level of service and marketing to the owners of larger boats in the Chicago area. Listings are published in YachtWorld.	Ernst Anderson	
7/1/2001	12:00 AM	Attachment	C:\E Tech Systems\ACT\OAK!Merge 12 \Documents\Oakmerge_Manual_12.pdf see attachment	Chris Huffman	



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Using OAKMergeID will work for Contacts, Companies, Opportunities and/or Custom tables. If you create an OAKMergeID field in all three, it would look like this on a table merge:

Merge Rules					
ACT! Table		History			
Delimited File (csv or txt) Table		CSV Table			
Merge Source	Source Field or Value	ACT! Fields	Data Type	Required	
> Source Table Column		Link To: Contacts by Full Contact Name	String		
Source Table Column		Link To: Contacts by ACT! GUID	String		
Source Table Column	OAKMergeID	Link To: Contacts by OAKMergeID	String		
Source Table Column		Link To: Companies by Company Name	String		
Source Table Column		Link To: Companies by ACT! GUID	String		
Source Table Column		Link To: Companies by OAKMergeID	String		
Source Table Column		Link To: Opportunities by Opportunity Name	String		
Source Table Column		Link To: Opportunities by ACT! GUID	String		
Source Table Column		Link To: Opportunities by OAKMergeID	String		
Source Table Column		Link To: Groups by Group Name	String		
Source Table Column		Link To: Groups by ACT! GUID	String		
Source Table Column	Record_Manager	Record Manager (Name, Login or GUID)	String		
Source Table Column	TYPE	History Type	String		⚠
Source Table Column	Regarding	Regarding	String		⚠

Above is for LINKING the rows in a History table to Contact, Company, or Opportunity.

This LINKING method is often used to associate History with contacts, but you do not need to also link to Companies. History at the contact level is rolled up to the company level in Act!



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The same screen if there are NO OAKMergeID fields in the database would not contain the Link using OAKMergeID options

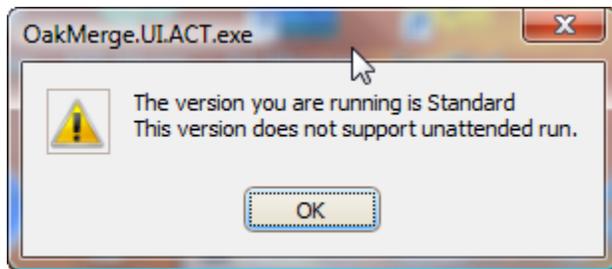
Group records does not support the OAKMergeID linking field.

Example 18: : Running in Unattended Mode (On a Schedule) (Run Automatically from Windows scheduler or another program)

OAK!Merge can be run automatically from a scheduler program or command line. A scheduler program is not included in OAK!Merge, but a free scheduler is included in Microsoft operating systems. For example, In Windows 10 or later it is the "Task Scheduler". It is an Administrative Tool under the control panel.

This feature requires the Advanced version or higher of OAK!Merge
It will not run in the free trial mode.

If you try to run from another version you will get this error:





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First run your merge from inside **OAK!Merge** and Create/save it as a Profile. ,
Then you can repeat it from a batch file, command line or scheduler. ,

Ready to Run

EXECUTION OPTIONS

Validate / Preview
 Test Run: limited to rows
 Complete Run

Execution Logging Level:

Number of rows to skip:

MAPPING (Contains Field Mapping and Merge Rules)

Name:
Description:

PROFILE (Contains Complete Merge Configuration including Mapping)

Name:
Description:

MERGE CONFIGURATION

Delimited File (csv or txt)		Act!	
file_name:	C:\E Tech Systems\ACT1_Contacts_updates.csv	database:	C:\ACTDATA\ETS_Master_v24.pad
first_row_as_header:	True	user:	Alan
delimiter:	Comma	pwd:	
encoding:		group:	

CSV Table		Act! Contacts	
Merge Options:			
Match Found:	Update	Field Update Condition:	UpdateAlways
Match Not Found:	Add		
Matching Fields:			
Contact	Source Table Column	Contact	No Transformation
Company	Source Table Column	Company	No Transformation
Title	Source Table Column	Title	No Transformation
Address1	Source Table Column	Address 1	No Transformation

Buttons: Support / Tools, Close, Back, Start Over, Run

After you save profiles, they can be run manually from the initial OAK!Merge screen or used in a batch file. , A batch file can be run by clicking on in manually when needed or via the windows scheduler.

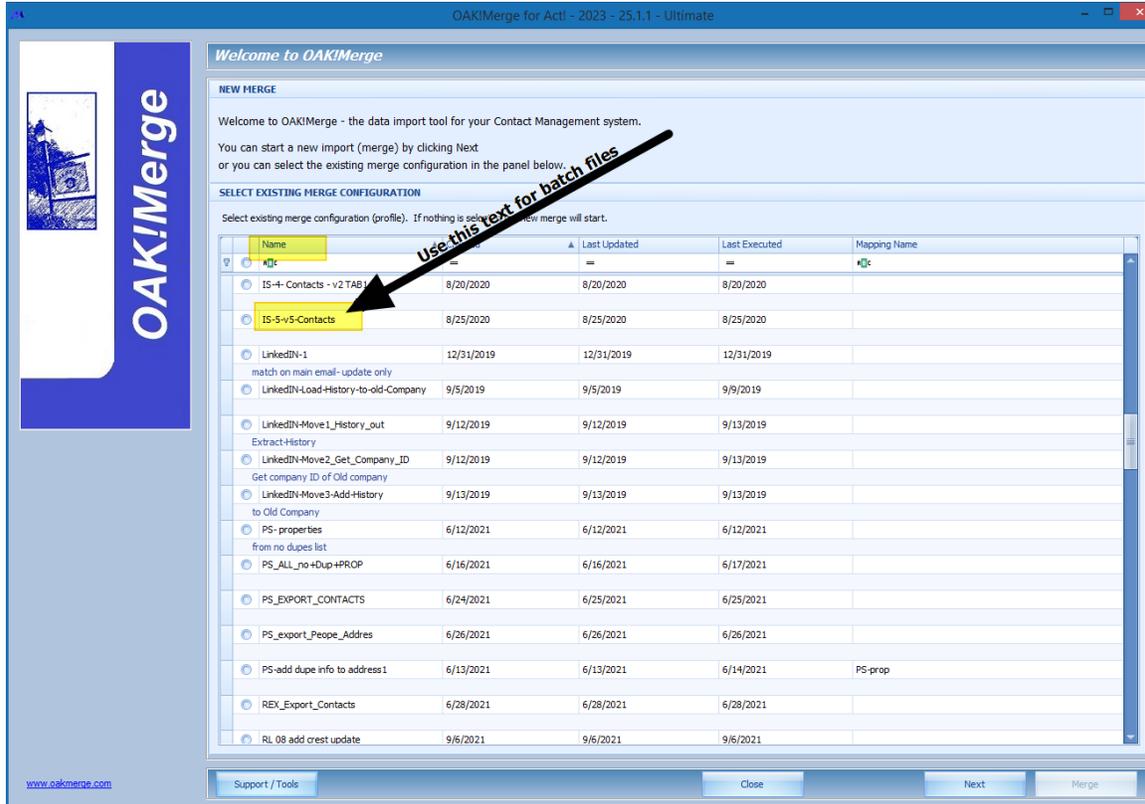
A batch file is a plain text file that ends in .bat
You can create and edit them using notepad.exe



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Format for command line is <path> *OakMerge.UI.ACT* <profile name> (optional logging level switch)

An Example to run 3 merges in a row is a dos batch file with:

```
"C:\E Tech Systems\ACT\OAK!Merge 21\OakMerge.UI.ACT" "batch ONE" 2
```

```
"C:\E Tech Systems\ACT\OAK!Merge 21\OakMerge.UI.ACT" batch2 3
```

```
"C:\E Tech Systems\ACT\OAK!Merge 21\OakMerge.UI.ACT" batch3 Errors
```

Steps ,

1. Create, Save and test a Profile in **OAK!Merge**. Note the name of the profile.
2. Edit and test your command line using a DOS BATCH file like the RUN_OAKmerge.bat file. A sample command line is

```
"C:\E Tech Systems\ACT\OAK!Merge 21\OakMerge.UI.ACT" batch44
```



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3. Set your scheduler to run using the same command line you tested in the Run_OAKmerge.bat file.

It can then run on your desired schedule.

TIP: Use profile names with no spaces or enclose them in quotes.

Merge from QB would not work

but Merge_from_QB or "Merge from QB" would work OK!

TIP: The logging level codes expanded from 4 to 9 in version v23. Old batch files using them may need to be updated. Full logging changed from 3 to 999

Execution Logging Level : determines how much info is recorded in the log file created with each merge.

The image shows three sequential screenshots of the 'Ready to Run' dialog box, illustrating the 'Execution Logging Level' dropdown menu. Each screenshot shows the 'EXECUTION OPTIONS' section with radio buttons for 'Validate / Preview', 'Test Run: limited to' (set to 3 rows), and 'Complete Run' (selected). A 'Number of rows to skip' field is set to 0. The 'Execution Logging Level' dropdown is highlighted in yellow in the first screenshot and shows the following options: 'Errors and Warnings', 'No Logging', 'Errors Only', 'Errors and Warnings', and 'Errors, Warnings and Skipped Records'. The second screenshot shows the dropdown expanded with options: 'Errors and Warnings', 'Records skipped due to merge rules', 'Records deleted due to merge rules', 'Only appended records', and 'Only updated records'. The third screenshot shows the dropdown expanded with options: 'Errors and Warnings', 'Only appended records', 'Only updated records', 'Records processed successfully (appended, updated or deleted)', and 'Full Logging'.



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The Logging Level Switch is optional. The default level is "Full". The default level will be used either when no level is specified, or invalid level is specified.

The possible values are:

Description	Alpha Code	Number
No Logging	None	0
Errors Only	Errors	1
Errors and Warnings	ErrorsWarnings	2
Errors Warnings and Skipped Records	ErrorsWarningsAndSkipped	3
Records skipped due to merge rules	SkippedOnly	4
Records deleted due to merge rules	DeletedOnly	5
Only appended records	AppendedOnly	6
Only updated records	UpdatedOnly	7
Records processed successfully (appended updated or deleted)	SuccessOnly	8
Full Logging	Full	999

A sample command line for errors only is

```
"C:\E Tech Systems\ACT\OAK!Merge 21\OakMerge.UI.ACT" batch44 1
```

Or

```
"C:\E Tech Systems\ACT\OAK!Merge 21\OakMerge.UI.ACT" batch44 Errors
```

TIP: : For testing the BAT file, right mouse click to edit it and add a second line "pause". This will allow you see it run and debug it if you have errors. See example below.

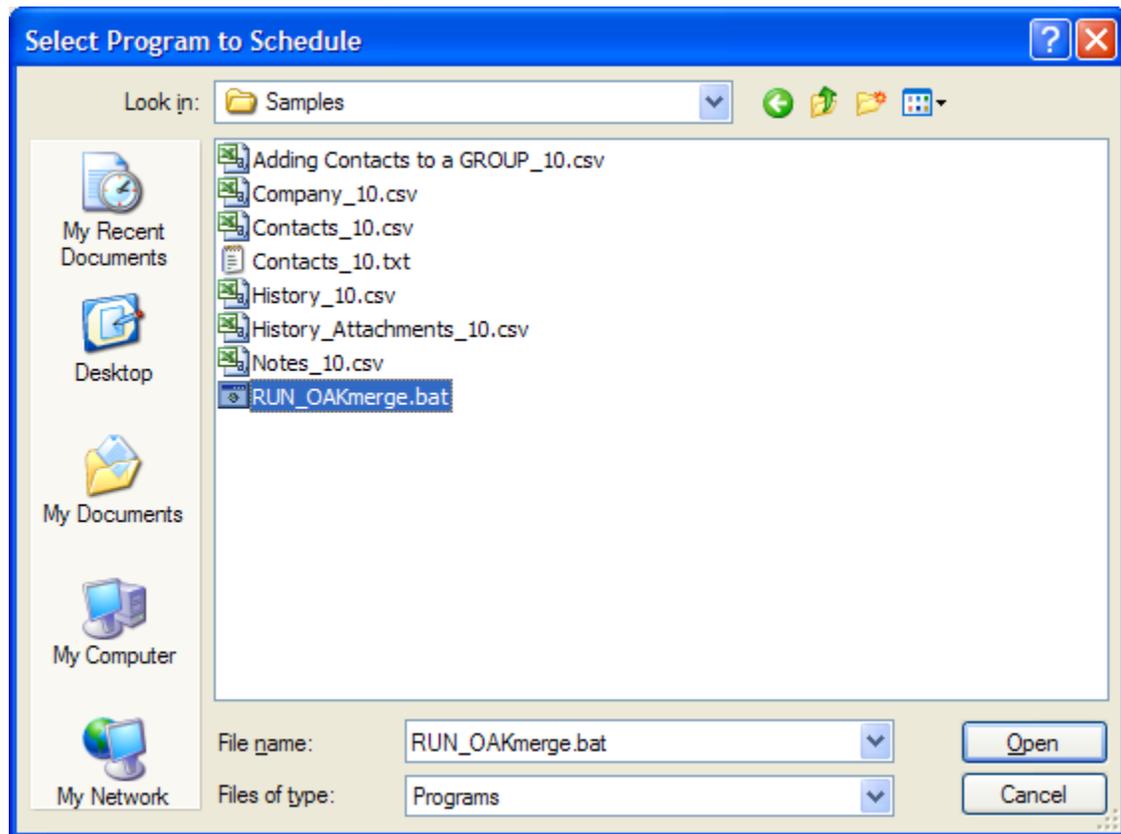


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```
C:\Windows\system32\cmd.exe  
C:\Users\Alan\Desktop>"C:\E Tech Systems\ACT\Oak!Merge 12\OakMerge.UI.ACT" Group  
_Import  
C:\Users\Alan\Desktop>pause  
Press any key to continue . . .
```





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Sample Run_OAKmerge.bat with Remarks (rem) to display as it runs

```
rem batch file to run a merge from a stored profile in OAK!Merge
"C:\E Tech Systems\ACT\OAK!Merge for ACT\OakMerge.UI.ACT" batch44
rem All Done- log files with results are in C:\E Tech Systems\ACT\OAK!Merge for ACT\Logs
rem remove the pause below to run unattended from a scheduler
Pause
```

```
C:\WINDOWS\system32\cmd.exe
C:\TEMP>rem batch file to run a merge from a stored profile in OAK!Merge
C:\TEMP>\"C:\E Tech Systems\ACT\OAK!Merge for ACT\OakMerge.UI.ACT\" batch44
C:\TEMP>rem All Done- log files with results are in C:\E Tech Systems\ACT\OAK!Merge for ACT\Logs
C:\TEMP>rem remove the pause below to run unattended from a scheduler
C:\TEMP>Pause
Press any key to continue . . . _
```

To monitor what happened on unattended merges, open the merge report file in the logs folder. Each merge creates a log file ending in “.htm” with the results of the merge. The default location is **C:\E Tech Systems\ACT\OAK!Merge for ACT\Logs**. Just double click on a file to view it.



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Example Merge Report as a htm file in the logs folder

Importing table Contacts from CSV Table.
If you have ACT! open, you may need to refresh the current view to see updated data.

Initial import numbers:	Rows in source table	3029
	Rows in target table	0

Import for table Contacts has completed with warnings.

After import numbers:	Rows in target table	3029
	Total rows processed	3029
By Status:	Rows processed successfully	2311
	Rows processed with warnings	718
	Rows skipped due to errors	0
Merged rows summary:	Added	3029
	Updated	0
	Deleted	0
	Skipped	0
	Duplicates	0

Additional details: Execution time: 3 min 2 sec

All Rows	Processed Completely	Processed With War
- Record 1 was added.		
- Record 2 was added.		

TIP: to see what the unattended merges have been doing, check the Logs files and set different logging levels. Appendix 4 explains the logs



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Example 19: Act! to Act! Merges:

You can merge some the tables from an **Act!** database to another **Act!** database in the Pro version. Both **Act!** databases must be same version as the installed version of **Act!** where **OAK!Merge** is installed. You can merge or append one table at a time. For example,

- Contacts to Contacts or
- Companies to Companies.
- Contacts to Companies
- Groups to Opportunities
- Custom table to Custom table
- Users to Users
- Products to Products (but not custom product fields)
- Append Notes and link them to other tables
- Append History and link them to other tables
- Append Activities and link them to other tables

One interesting merge is to DELETE all the contacts, companies, groups, opportunities, or rows in custom tables in the target Act! database if they match the source. This deletes all the records that match any duplicates.

If you are doing an Act! to Act! merge in order clean up a corrupted or bloated database, we recommend this order. Some can be Act! to Act! and some should not be direct. See below

1. Users
2. Companies
3. Contacts
4. Products
5. Opportunities
6. Groups (Group Names, not memberships or criteria)
7. History
8. Notes
9. Activities

There is some info that is lost, like Secondary contacts, relationships, and group memberships. You can add the group memberships back in, but it is one group



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at a time

Contacts, Companies, OPPs, Groups, Products can all be **ACT to ACT**, or if you want to:

Act to CSV, edit the CSV, then CSV into new ACT

For secondary contacts, Group Memberships, Notes, History, and Activities do **not** do ACT to ACT; you need to go

Act to CSV, edit the CSV, then CSV into new ACT

You do not need to use the transformation to go to plain text.

This gives you more control to delete some unneeded rows and avoid some duplicates.

It is more thorough to do a File New database, and recreate the custom fields; than to do a File Save as / Empty copy.

Tip: : Always backup at each step, so you don't have to start over if one step is not successful.

Tip: If user record owners is important for history, notes, or contacts you need to test and find a way to do that or put the original owner into the body.



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Select Act! as the Type for both Merge Destination (also called the target) and Act! as the Import Source

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type

ACT! PAD File

User Id

Password

MERGE DESTINATION

Type

ACT! PAD File

User Id

Password

TIP: : You can also make the source and target the same database to merge Groups to Opportunities for example



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Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

Password:

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.pad

User Id:

Password:

Tip: : You need to be able to open both **Act!** databases in **Act!** on the same PC where **OAK!Merge** is installed. Both Act! databases must be same version as the installed version of **Act!**

You then pick the table for source and target. Normally it is the same in Act! to Act! merges, but you can do cross table merges to change groups into opportunities for example.

You can only merge from/to Contacts, Companies, Groups, Products and Opportunities. Plus History, Notes, or Activities was added in 17.2

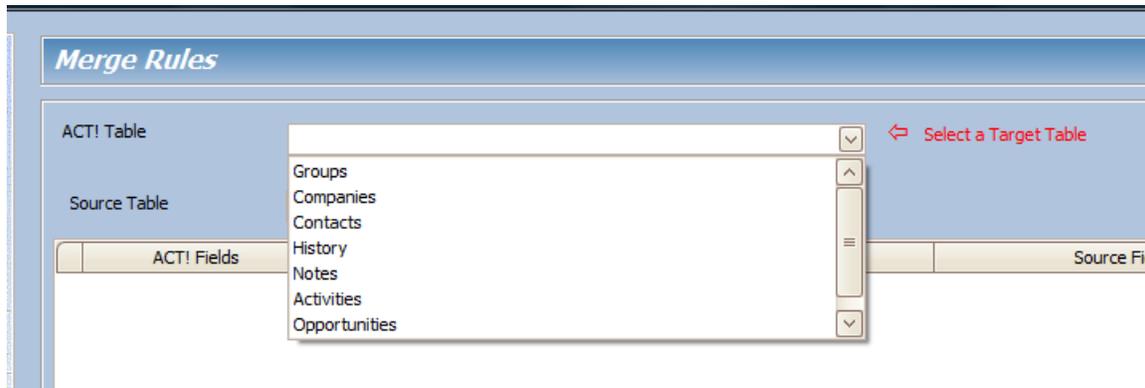


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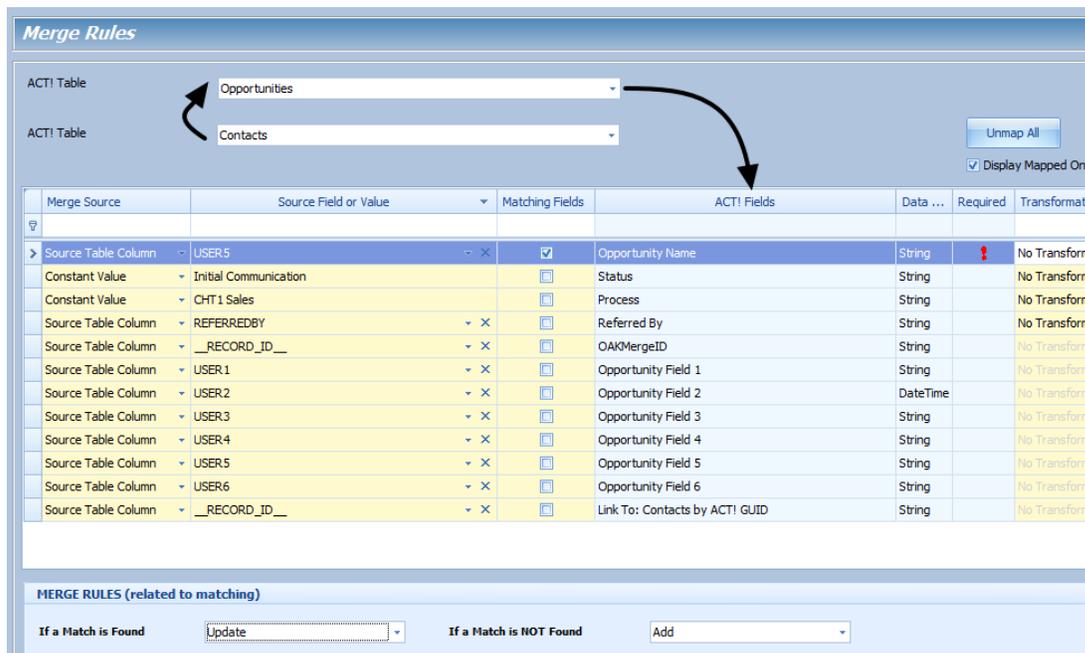
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The top one is the Merge Destination Table (also called the target)
The lower one is the import source table



Tables for target and source:

A contact TO opportunity merge might be mapped like this





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You get a Validation dialog to warn you that you have not selected any matching fields, so you will be appending all records. You "Click here" and then the yes button to proceed.





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You pick what to match on and the Merge Rules
For cases where Contact does NOT match you can add or skip

MERGE RULES (related to matching)

If a Match is Found If a Match is NOT Found

[Support / Tools](#) [Close](#) [Back](#)

For cases where Contact does match, you can update, skip, add, or delete

MERGE RULES (related to matching)

If a Match is Found

If a Match is NOT Found

[Support / Tools](#) [Close](#) [Back](#)

To update existing and Add new:

MERGE RULES (related to matching)

If a Match is Found If a Match is NOT Found

Above works for Contacts, Companies, Groups, Opportunities, Users and Products, Custom tables

History, Activities, Notes, Secondary Contacts, Product_Opportunities are append only



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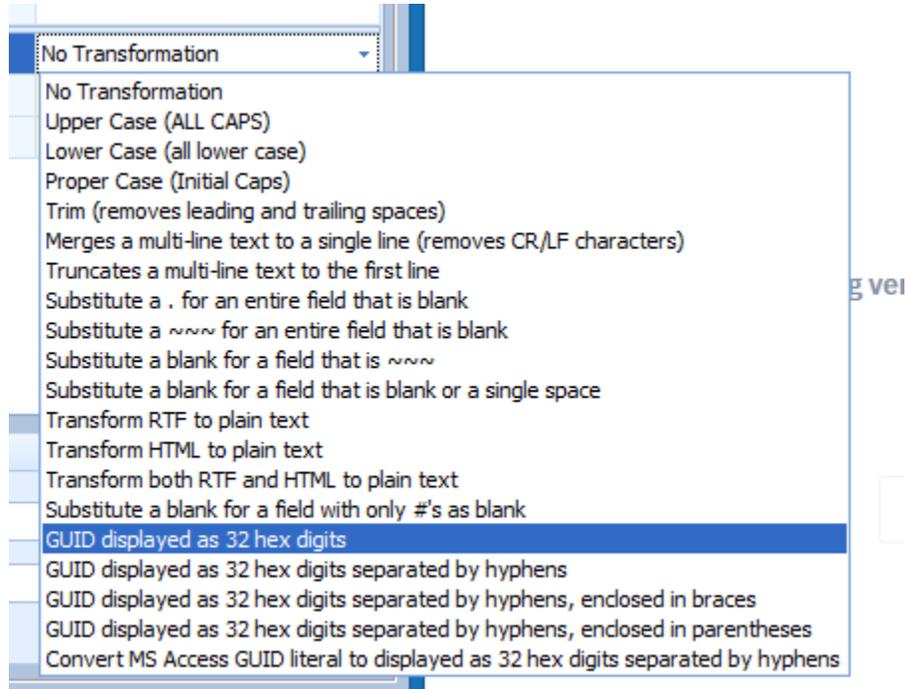


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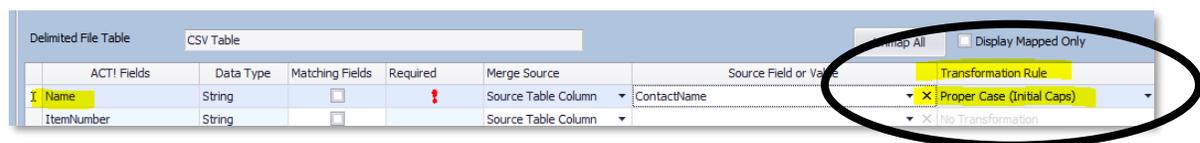
Example 20: Transformations and Reserved Key Words

You can use transformations or Reserved Key Words on text fields to change them as they are imported. Reserved Key Words will trigger data actions if found in ANY source field. They are always active and you do not have to use a transformation rule to use one of them. Transformations are **not** usable in date or numeric fields.

All transformations are in the list



For example you could transform random text, all UPPER case, or all lower case to upper/lower Proper Case using the Proper Case Rule



Standard transformations include



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- Upper Case (ALL CAPS)
- Lower Case (all lower case)
- Proper Case (Initial Caps)
- Trim (removes leading and trailing spaces)
- Substitute a . for an entire field that is blank
- Substitute a ~~~ for an entire field that is blank
- Substitute a blank for a field that is ~~~

Plus

- Substitute a blank for a field that is blank or a single space

In Addition to transformation Rules, Reserved Key Words can be used to alter text in if they are the source field value. The first Key Word released is \$BLANK\$ It can be used in a source file for some records or as a Source Constant Value for all rows.

For example you could match on contact name and blank out all the Referred By fields.

Merge Rules

ACT! Table:

Delimited File Table: Unmap All Display Mapped Only

ACT! Fields	Data Type	Matching Fields	Required	Merge Source	Source Field or Value	Transformation Rule
Contact	String	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Source Table Column	ContactName	No Transformation
Referred By	String	<input type="checkbox"/>	<input type="checkbox"/>	Constant Value	\$BLANK\$	No Transformation

Transformation Definitions

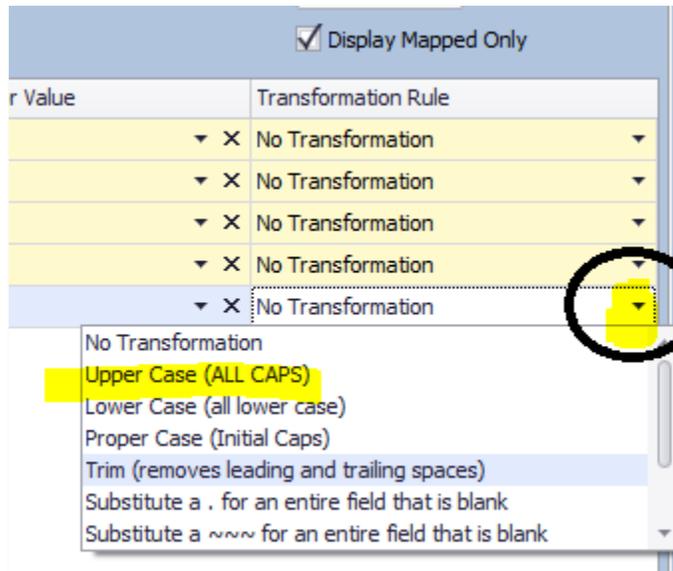
Click the down arrow to see the available transformations



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Full List

No Transformation
Upper Case (ALL CAPS)
Lower Case (all lower case)
Proper Case (Initial Caps)
Trim (removes leading and trailing spaces)
Merges a multi-line text to a single line (removes CR/LF characters)
Truncates a multi-line text to the first line
Substitute a . for an entire field that is blank
Substitute a ~~~ for an entire field that is blank
Substitute a blank for a field that is ~~~
Substitute a blank for a field that is blank or a single space
Transform RTF to plain text
Transform HTML to plain text
Transform both RTF and HTML to plain text
Substitute a blank for a field with only #'s as blank
GUID displayed as 32 hex digits
GUID displayed as 32 hex digits separated by hyphens
GUID displayed as 32 hex digits separated by hyphens, enclosed in braces
GUID displayed as 32 hex digits separated by hyphens, enclosed in parentheses
Convert MS Access GUID literal to displayed as 32 hex digits separated by hyphens
Attachment Source Path

Upper Case

Converts Text to ALL CAPS



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This is a test is transformed to: THIS IS A TEST

Lower Case

Converts Text to all lower case

This is a TEST is transformed to: this is a test

Proper Case

Converts Text so that the First Letter Of Each Word Is Capitalized and the rest is set to lower case

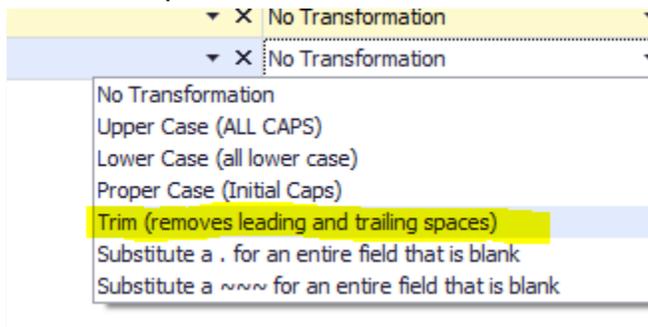
This is a TEST is transformed to: This Is A Test

Note: abc company or ibm is transformed to: Abc Company or Ibm

Trim

Removes leading and training spaces

" Spaces before and after " becomes "Spaces before and after"



Transform RTF to plain text

Converts Text from RTF format to plain text



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Source Table Column	RECORD_USER	No Transformation
Source Table Column	NOTE_TEXT	No Transformation
Source Table Column	NOTE_TIME	Proper Case (Initial Caps)
Source Table Column	ATTACHMENT_NAME	Trim (removes leading and trailing spaces)
Source Table Column	ATTACHMENT_FILENAME	Substitute a . for an entire field that is blank
Source Table Column	ATTACHMENT_FILENAME	Substitute a ~~~ for an entire field that is blank
Source Table Column	__RECORD_ID__	Substitute a blank for a field that is ~~~
Source Table Column	__RECORD_ID__	Substitute a blank for a field that is blank or a single space
Source Table Column	__RECORD_ID__	Transform RTF to plain text

TIP: Review the sample_exports.zip file in the samples folder to see the notes_text in RTF format (notes.csv) and transformed. (notes_transformed.csv)

Transform HTML to plain text

Converts Text from RTF format to plain text. This is used for Act! databases v22 and later. Before v22, RTF was used.

REGARDING	DATA TYPE	TRANSFORMATION
DETAILS	String	No Transformation
START_TIME	DateTime	No Transformation
END_TIME	DateTime	Upper Case (ALL CAPS)
ATTACHMENT_NAME	String	Lower Case (all lower case)
ATTACHMENT_FILENAME	String	Proper Case (Initial Caps)
ATTACHMENT_SHORTCUT	Boolean	Trim (removes leading and trailing spaces)
		Merges a multi-line text to a single line (removes CR/LF characters)
		Truncates a multi-line text to the first line
		Substitute a . for an entire field that is blank
		Substitute a ~~~ for an entire field that is blank
		Substitute a blank for a field that is ~~~
		Substitute a blank for a field that is blank or a single space
		Transform RTF to plain text
		Transform HTML to plain text
		Transform input to plain text
		Substitute a blank for a field with only #'s as blank
		Attachment Source Path

Transform Both HTML and RTF Input to plain text

Converts Text from HTML and RTF format to plain text. This is used for Act! databases that have older notes or histories formatted in RTF as well as the newer HTML ones. Before v22, RTF was used, but v22 on creates them in HTML format.



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DETAILS	String		No Transformation
START_TIME	DateTime		No Transformation
END_TIME	DateTime		Upper Case (ALL CAPS)
ATTACHMENT_NAME	String		Lower Case (all lower case)
ATTACHMENT_FILENAME	String		Proper Case (Initial Caps)
ATTACHMENT_SHORTCUT	Boolean		Trim (removes leading and trailing spaces)
			Merges a multi-line text to a single line (removes CR/LF)
			Truncates a multi-line text to the first line
			Substitute a . for an entire field that is blank
			Substitute a ~~~ for an entire field that is blank
			Substitute a blank for a field that is ~~~
			Substitute a blank for a field that is blank or a single s
			Transform RTF to plain text
			Transform HTML to plain text
			Transform input to plain text
			Substitute a blank for a field with only #'s as blank

Do Both RTF and HTML

Merge Multi-line text into a single line

This removes carriage returns and line feed characters (CR/LF) from text in a field, replacing them with a space.

Truncate Multi-line text to the first line

This takes only the first line of a multi-line text field. Any additional lines in that multi-line text field are skipped.

Dealing with Blanks:

Note that updated fields that are blank are also controlled by the update options. See the section above on **MATCHING vs.**

LINKING :

MERGE RULES (related to matching)

If a Match is Found If a Match is NOT Found

Field Update Condition

- All fields are updateable
- Only blank fields are updateable
- Only fields with data are updateable



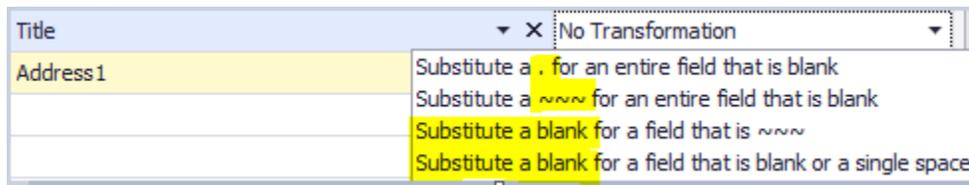
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TIP: The transformations regarding blanks are similar to each other but work differently. The first 2 AVOID a blank field in Act! and the 2nd two FORCE a field in Act! to be blank. Also a reserved key word is available to blank a field. A Reserved key word is NOT a transformation rule but is another way to do the same thing in the case of \$BLANK\$

The top 2 below AVOID a blank and bottom 2 FORCE a blank:



Two ways to avoid blank fields in Act! if the source data is blank:

1. Substitute a . for an entire field that is blank

Converts a blank field in the source to one period ".",
Other text values are not affected
This means: if input is blank; put a "." in the field.
This could be used in a field where data is required.
A "." Is small and does not stand out on Act! layout .

2. Substitute a ~~~ for an entire field that is blank

Converts a blank field to three tildes "~~~",
Other text values are not affected
This means: if input is blank; put a "~~~" In the field.
This could be used in a field where you want to identify the blanks in a particular import or needed to do a search and replace in Act! after the merge. In Act! you could search for a ~~~ and replace with another string or have a dynamic group to find them.

Three ways to FORCE blank fields into Act!

if the data in Act! is blank or has data:

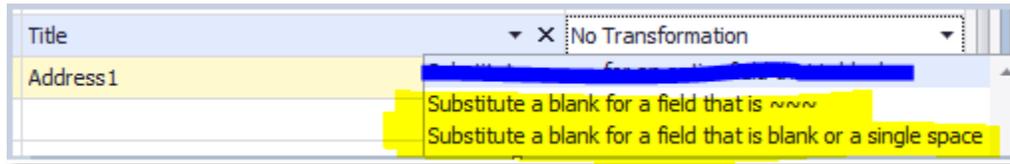
Use 1 of 2 transformations or a Reserved Key Word: \$BLANK\$



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1. Substitute a blank for a field that is exactly “~~~”

Overwrites a field in Act! with a blank field if the source is exactly equal to 3 tildes “~~~”

Other text values are not affected

This means: if input is “~~~”; blank out the field in Act!.

2. Substitute a blank for a field that is blank, or is equal to one or more spaces.

Overwrites a field in Act! with a blank field if the source is blank

Other text values are not affected

This means: if input is blank; then blank out the field in Act!. This transformation will replace all the target records for this field, blank or new data from the source. This is the opposite of the default action.

Note that the default without this transformation is the source field is skipped if blank and the target field is not updated to blank.

The default is OAK!Merge does not change fields to blank if there is data in Act! and the import source is blank.

3. Use the Key word \$BLANK\$ described below.

Key words are available for special situations to change the target field.

They may be used in the source file as data or as a constant value in the Mapping section. For text fields, the key words can be part of the string but for date and numeric fields, key words must be exactly equal to the string.

\$BLANK\$ works with text fields: Not: date, and numeric field types; Time, URL, Email, Annual Date, Number, Decimal, Currency, Yes/NO and Memo fields or picture fields



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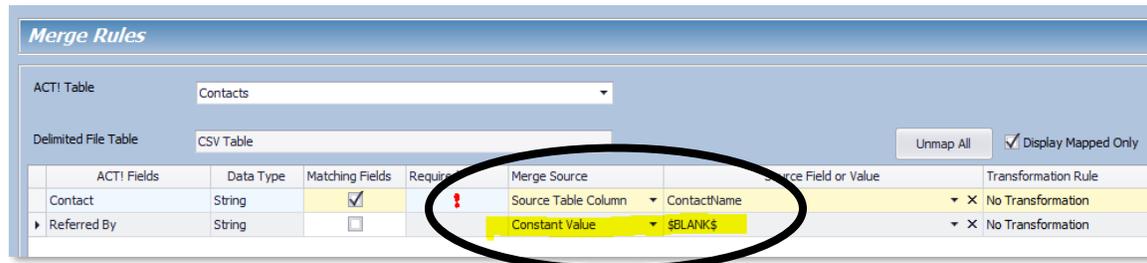
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\$BLANK\$

\$BLANK\$ overwrites a text field in Act! with a blank field if the source is contains \$BLANK\$ Other text values are not affected

This means: if input is \$BLANK\$ then remove all the data from the field in Act!.

If \$BLANK\$ is in the source file for a field or set as a Constant Value in the mapping, then the field will be blanked. This allows you to set all the records that match and are updated to a blank for the target field by using the Source Constant in the OAK!Merge mapping; OR you can use \$BLANK\$ as a value in the actual source data for some or all the rows in the source data for the target field.



Or in the data for example

RecordID, Referred By
 1001,Trade Show 2009
 1002,\$BLANK\$
 1003,Trade Show 2011
 1004,Trade Show 2011
 1005,Trade Show 2011
 1006,Trade Show 2009
 1007,\$BLANK\$
 1008,Trade Show 2011



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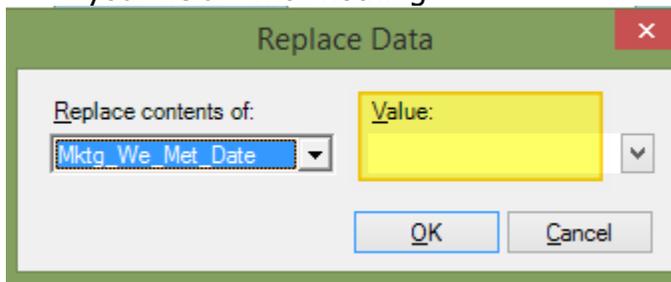
Row 2 in 7 would over write any data in Act! for Referred by and blank the field only for that contact. This assumes you are matching on RecordID and Updating the contacts

TIP: an example of using a \$BLANK\$ would be clear out old address 2s or sales reps that have changed; and there should be no data in the field for some records.

TIP: This does NOT work with dates and numbers fields.

AS A WORK AROUND:

1. Pick a date no records will have like 7/7/1977 in <your field>
2. Replace all the blank dates in your source file with 7/7/1977
3. Do your merge (some rows have valid dates, and any that need to blanked out have 7/7/1977)
4. In ACT, lookup all the contacts with the date of 7/7/1977 in <your field>
5. EDIT > REPLACE FIELD
< your field> with nothing



TIP: If you use \$BLANK\$ as a constant value in the mapping section, it will clear that text field in all contacts that are updated.



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ALL KEYWORDS:

\$BLANK\$

(see previous section)

\$ROW\$

This adds the row number from the source file

\$DATE\$

This adds current system date

\$DATETIME\$

This adds current system date and time

\$TIME\$

This adds current system time

\$USER\$

This adds current Act! user who was used as a log in to do the merge.

\$GUID\$

This adds a new GUID (Globally Unique Identifier)



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Example 21: Adding Divisions to Companies

OAK!Merge Version 14.3 and later supports Adding Companies as divisions of other companies. You can have multiple levels of Division to Division to Company.

“CH Holding” has 3 levels with 3 companies in the 3rd level in the Hierarchy shown below. You can create a Hierarchy of Divisions under parent companies. This does NOT use the Division Field in the company.

The screenshot displays the OAK!Merge software interface. On the left, a 'Companies' sidebar shows a tree view of 'All Companies - 25 company(s), 8 division(s)'. The hierarchy is as follows:

- Ace Pet Store Franchises
- AVB Enterprises
- Best Lender Financing
- Black Forest Baking
- Boomer's Artworx
- Brandee's Bakery
- Brushy's Golfing World
- CH Holding
 - CH Gourmet Imports
 - CH TechONE (highlighted)
 - CH TechONE - Accounting
 - CH TechONE - Administration
 - CH TechONE - Sales
- Circle Photography
- Freemont Corp
- Green Plastics
- Griping International
- Making Technology Co
- Mercury Production Management
- MI Business Plan, Inc.
- Mutthound Enterprises
- Parsley Group
- Sewing Room;The
- Swing Software
- T-Bone's Steakhouse
- Verge Records
- Widget Corporation
- Williams Consulting
- Willis Enterprises
- Yellow Jersey Bikes

The main window shows the 'Detail View' for 'CH TechONE'. The company name is 'CH TechONE'. Contact information includes Phone: (212) 555-2485, Fax: (212) 555-8745, Toll-Free: (800) 555-2157, and Web Site: www.CHTechONE.com. Below the company details, there are tabs for 'Contacts', 'Notes', 'History', 'Activities', 'Opportunities', and 'Documents'. The 'Notes' tab is active, showing a table with the following data:

Division	Create Date
CH TechONE - Accounting	8/...
CH TechONE - Administration	6/...
CH TechONE - Sales	



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Example- Sample merge in the Samples folder:
Samples\Company_WITH_Divisions_For_Hierarchy_14_4.csv

COMPANY	LINK_TO_Parent
Boomer's Artworx Subsidiary 1	Boomer's Artworx
Boomer's Artworx Subsidiary 2	Boomer's Artworx
Boomer's Artworx Subsidiary 3	Boomer's Artworx
AAAA Flakes Inc.	Jake Flakes Inc.
BBBB Flakes Inc.	Jake Flakes Inc.
Vacation Tax Haven	Yellow Jersey Bikes

Before in ACT





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Execute Options can be to add new, skip or update existing Companies. The Merge connects a division to its parent. The "Link To: Company by Name" is to make the company a division of its parent. The "Link To: Company by Name" has the parent's name.

ACT! Fields	Data Type	Matching Fi...	Required	Merge Source	Source Field or Value	Transformation Rule
Company	String	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Source Table Col...	COMPANY	No Transformation
▶ Link To: Company by Name	String	<input type="checkbox"/>	<input type="checkbox"/>	Source Table Col...	LINK_TO_Parent	No Transformation

EXECUTE OPTIONS

If a Match is Found: Update If a Match is NOT Found: Add

If an OAKMergeID field was created in the Company; it may be used to link the Division to the Parent Company. The Act! GUID of the Parent is also available to link the Division to the Parent Company.

Link To: Company by Name	String	<input type="checkbox"/>		Source Table C...	
Link To: Company by ACT! GUID	String	<input type="checkbox"/>		Source Table C...	
Link To: Company by OAKMergeID	String	<input type="checkbox"/>		Source Table C...	

TIP: You **cannot** link to a Company that does not already exist



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After updates by OAK!Merge

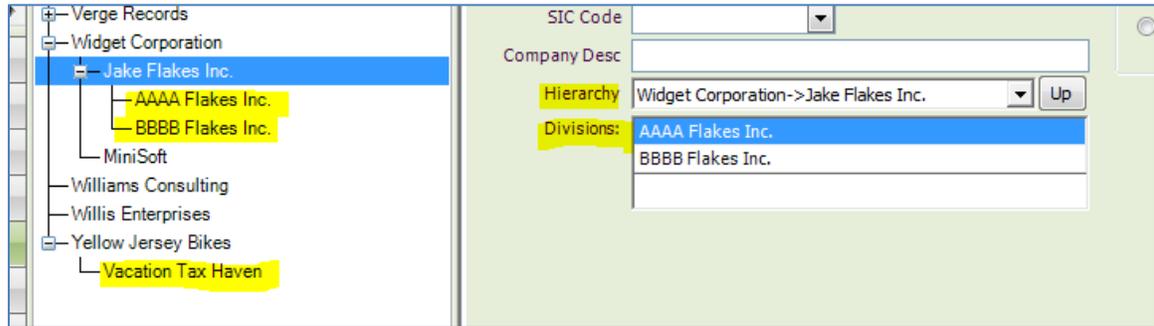




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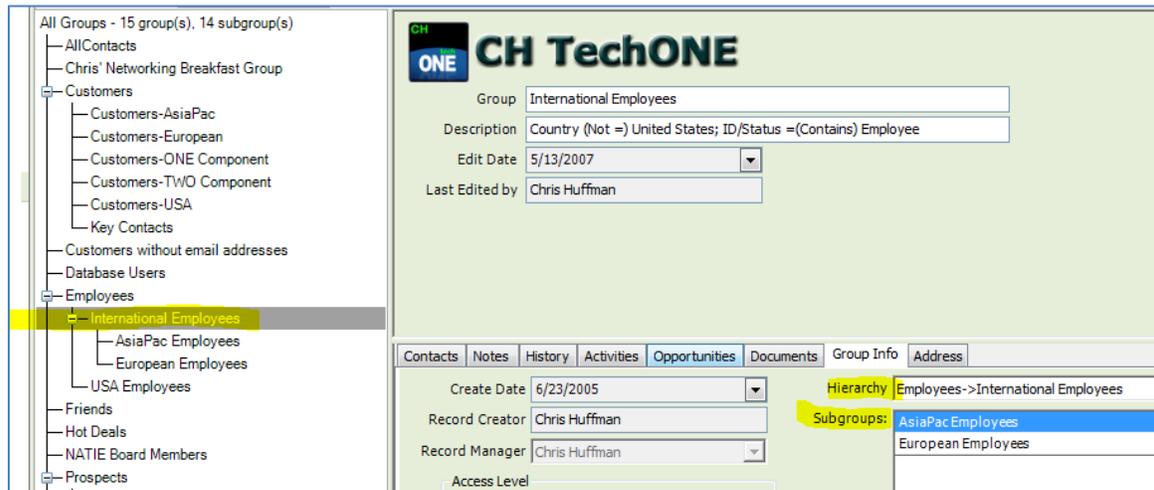


Example 22: Adding Sub Groups: to Groups

OAK!Merge Version 14.3 and later supports Adding Subgroups to groups. You can have multiple levels SubGroup to SubGroup to Group

This is very similar to linking companies above. You can have many Groups in a deep Hierarchy. :

Before





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Sample Data: Samples\ Groups_WITH_Divisions_For_Hierarchy_14_4.csv

Group	LINK_TO_Parent
FaceBook	Friends
LinkedIn	Friends
Employees	Staff
Shift 1	Employees
Shift 2	Employees
Shift 3	Employees

Note that the Employees Group is in both columns above. It is a sub group of Staff and has its own subgroups that link to it.

TIP: : The Groups in the Link_to_Parent field above have to exist. OAK!Merge will not add them if they do not exist. It will add GROUP column entries, but not link to Group. "Staff" did not exist in the DEMO database, so you can run a merge to map Link_TO_Parent column to GROUP field to create any needed Groups. Another way of saying this is you cannot link to Group that does not already exist

Mapping

Merge Rules

ACT! Table: **Groups**

Delimited File (csv or txt) Table: **CSV Table**

Unmap All

Display Mapped Only

ACT! Fields	Data Type	Matching ...	Required	Merge Source	Source Field or Value	Transformation Rule
Group Name	String	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Source Table ...	Group	No Transformation
Link To: Group by Name	String	<input type="checkbox"/>	<input type="checkbox"/>	Source Table ...	LINK_TO_Parent	No Transformation

EXECUTE OPTIONS

If a Match is Found: **Update**

If a Match is NOT Found: **Add**



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Import for table Groups has completed successfully.		
After import numbers:	Rows in target table	35
	Total rows processed	6
By Status:	Rows processed successfully	6
	Rows processed with warnings	0
	Rows skipped due to errors	0
Merged rows summary:	Added	5
	Updated	1
	Deleted	0
	Skipped	0
	Duplicates	0
Additional details:		Execution time: 1 sec 936 msec

After:

The screenshot shows the Act! software interface. On the left is a tree view of contact groups. The 'Staff' group is expanded, showing 'Employees' and 'International Employees'. 'International Employees' is selected. The main pane shows details for this group, including 'Edit Date' (5/13/2007), 'Last Edited by' (Chris Huffman), 'Create Date' (6/23/2005), 'Record Creator' (Chris Huffman), 'Record Manager' (Chris Huffman), and 'Access Level' (Public). The 'Hierarchy' field shows 'Staff->Employees->International Employees' and the 'Subgroups' field lists 'AsiaPac Employees' and 'European Employees'.



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Example 23: Exporting all data from tables

OAK!Merge Version 14.3 Standard Edition and later supports exporting data from Act!. It exports all the exportable columns in the selected table and includes all the records in that table (unless a group is used to filter the export). The Basic edition does not do exports.

The data goes from an Act! table TO a CSV, XML format, or another Act! Database. (See example on Act! to Act! merges for details) To do any export set the Source to an Act! database and select a supported destination (or "target").

Supported Destinations are a CSV text file or XML formatted file or another Act! database. The destination Act! database must be able to be opened from the Act! client running on the same PC or Server as OAK!Merge.

OAK!Merge will export the tables that each version can import starting at Standard. The Act! Record_ID (GUID) is included in the exports.

For note, activity, history items, if the corresponding item is linked to more than one parent item (company, contact, opportunity, or group) it will be exported multiple times for each parent item. The name and ID number is included for each type. Contact Name and ContactID; Company Name and CompanyID; Opportunity Name and OpportunityID; Group Name and GroupID.

Importing and Exporting Attachments and Documents is supported as part of the History table

The display name and the actual path to the attachment, Link, URL, or shortcut is exported. Importing Shortcuts, Links, and URLs is NOT currently supported.

The Act! Record_IDs are GUIDs (globally unique identifier) .

Sample Act! GUIDs

ContactID called "__Record ID__" in the export file

30dcf716-4dd9-49cd-9727-3a2892197695
b93ae4fd-ab00-4fdf-ac83-cd429aa7381f
80bc7053-83e4-4ff2-9358-9afc42e35fad
75679789-52a3-439d-b287-17aebc86be4a



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TIP: IF you are using the Record IDs (GUIDs) to match on during imports, pay attention to case. The matching is case sensitive. Excel tends to change the case of GUIDs. Use lower case to match with Act!

Example: Step by step- Exporting the History or Notes table

1. Use the Swap Button to set the Import Source, Type to Act! and the Merge Destination, Type to Delimited File (CSV or txt)

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2015Demo.pad

User Id: []

Password: []

CHANGE MODE: Copy Up Copy Down Swap

MERGE DESTINATION

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 17\Samples\History_10.csv

Delimiter: Comma

First Row Contains Field Names

TIP: The Change Mode buttons are to Copy the lower panel info UP or Down; or the Swap them.

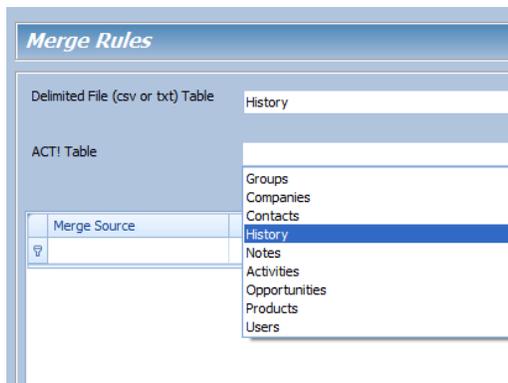


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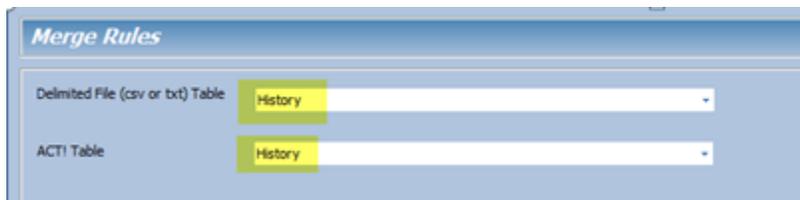


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2. When exporting, Pick the table you want to export. Different versions of OAK!Merge can import to or export from different tables,



3. always pick the same table name for the source and destination mapping on the merge rules



For Notes export, use NOTES and NOTES



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- All available fields are mapped. You can unmap any you don't want exported. Click on the X to unmap a field. Click Next to move on.

Merge Source	Source Field or Value	ACT! Fields	Data Type	Required	Transformation Rule
Source Table Column	RECORD_OPPORTUNITY_GUID	Link To: Opportunities by ACT! GUID	String		No Transformation
Source Table Column	RECORD_OPPORTUNITY_ID	Link To: Opportunities by OAKMergeID	String		No Transformation
Source Table Column	RECORD_GROUP	Link To: Groups by Group Name	String		No Transformation
Source Table Column	RECORD_GROUP_GUID	Link To: Groups by ACT! GUID	String		No Transformation
Source Table Column	RECORD_USER	Record Manager (Name, Login or GUID)	String		No Transformation
Source Table Column	HISTORY_TYPE	History Type	String	!	No Transformation
Source Table Column	REGARDING	Regarding	String	!	No Transformation
Source Table Column	DETAILS	Details	String		Transform RTF to plain text
Source Table Column	START_TIME	Start Time	DateTime	!	No Transformation
Source Table Column	END_TIME	End Time	DateTime		No Transformation
Source Table Column	ATTACHMENT_NAME	Attachment Description	String		No Transformation
Source Table Column	ATTACHMENT_FILENAME	Attachment File Name	String		No Transformation
Source Table Column	__RECORD_ID__	Record ID (ACT! GUID)	String		No Transformation

TIP: use one of the "to Text" transformations for details to remove formatting characters.

- Pick execution option and Run

Ready to Run

EXECUTION OPTIONS

Validate only
 Test Run: limited to 100 rows
 Complete Run

Execution Logging Level: Errors and Warnings

MAPPING INFORMATION



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Results page appears

TIP: The results page is saved in the LOGs folder as a viewable file.
These results end in .htm

An example results page:

C:\E Tech Systems\ACT\OAK!Merge 21\Log\OakMerge_201512070044.htm

See Appendix 4 for more info on the log files and logging levels

Review Merge Results

Importing table Contacts from Contacts.
If you have Delimited File (csv or txt) open, you may need to refresh the cu

Initial import numbers:	Rows in source table	211
	Rows in target table	0

Import for table Contacts has completed succesfully.

After import numbers:	Rows in target table	211
	Total rows processed	211
By Status:	Rows processed successfully	211
	Rows processed with warnings	0
	Rows skipped due to errors	0
Merged rows summary:	Added	211
	Updated	0
	Deleted	0
	Skipped	0
	Duplicates	0

Additional details: Execution time: 6 sec 725 msec

All Rows **Processed Completely**



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TIP: Review the sample_exports.zip file in the samples folder to see how the data is exported. Use the HTML or RTF or Both to Text transformation if you want plain text for the details in History or Note text in notes. There is also a sample of the notes_text in RTF format (notes.csv) and transformed. (notes_transformed.csv) in the sample_exports.zip file in the samples folder. See the info on the 3 "to text" transformations in the section on transformations. .

Tip: If the database is several GB in size, it may be an issue with a lot of email graphics stored in the History or Notes. You can purge all that, by using the transformation "RTF to Plain Text". This would require you to export all the history, using the transformation; Delete all the history; and then Add the history back in. All the graphics and formatting in History will have been converted to plain text,

TIP: For large amounts of history or notes, you can get an out of memory error. See Appendix 10 for work a rounds . Version 25 and later are 64 bit, so they have a lot more addressable memory to work with.

TIP: You can use Constant Values and/or KEYWORDS: in both imports and exports. They also can be inserted with other text or combined (except \$BLANK\$)

Delimited File (csv or txt) Fi...	Data Type	Required	Merge Source	Source
Private Contact	Boolean		Source Table Column	ISPRIVATE
Snapshot Contact Grade	String		Source Table Column	CUST_SnapshotContactGr
Snapshot Contact Rank	Int32		Source Table Column	CUST_SnapshotContactRa
Snapshot Favorites	String		Source Table Column	CUST_SnapshotFavorites_
Snapshot WhoIs	String		Source Table Column	CUST_SnapshotWhoIs_07
Spouse	String		Source Table Column	SPOUSENAME
Trivia	String		Source Table Column	CUST_Trivia_081318328
User 1	String		Constant Value	\$GUID\$
User 10	String		Source Table Column	USER10
User 2	String		Constant Value	\$ROW\$
User 3	String		Constant Value	\$USER\$
User 4	String		Constant Value	\$DATE\$
User 5	String		Source Table Column	USER5
User 6	String		Source Table Column	USER6



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\$GUID\$ \$ROW\$ \$USER\$ \$DATE\$ \$DATETIME\$ \$TIME\$
(see keywords section for definitions) Results in:

	BD	BE	BF	BG	BH	BI
v	USER1	USER10	USER2	USER3	USER4	USER5
	30dcf716-4dd9-49cd-9727-3a2892197695			1 Alan	12/27/2011	
	b93ae4fd-ab00-4fdf-ac83-cd429aa7381f			2 Alan	12/27/2011	
	80bc7053-83e4-4ff2-9358-9afc42e35fad			3 Alan	12/27/2011	
	75679789-52a3-439d-b287-17aebc86be4a			4 Alan	12/27/2011	
	18cc21fb-7c16-4327-b17d-d670fd287755			5 Alan	12/27/2011	
	03878556-a7fc-445a-baf2-cabb8e41e51a			6 Alan	12/27/2011	
	359f19f3-f4f6-4815-a4cf-3b7b0d1d53d0			7 Alan	12/27/2011	
	69353485-728f-4f51-8f6c-9676086cf741			8 Alan	12/27/2011	

EXPORTING THE GROUP MEMBERSHIPS LIST

This exports a CSV of all the Group Names linked to each Contact or Opportunity. These are in a field in exports called **__GROUPS__** which contains the comma delimited list of names of the groups. Both Static and Dynamic group memberships are included.

This adds a column to contacts and opportunities, but not companies. Companies are not allowed in Act! Groups.

This does **not** give you a list of all the contacts in a Group. It does tell you which groups each person is in.

TIP: The Group tab in Act! shows many opportunities, but they are a roll up of opportunities within contacts; like history. The opportunities export does not list these. Look at the groups that are in the Groups Tab in opportunities



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Merge Rules

Delimited File (csv or txt) Table:

ACT! Table: Display Mapped Only

Merge Source	ACT! (source) Field or Value	Delimited File (csv or ...)	Data Type	Transformation Rule
Source Table Col... USER1	USER1	USER1	String	No Transformation
Source Table Col... USER10	USER10	USER10	String	No Transformation
Source Table Col... USER2	USER2	USER2	String	No Transformation
Source Table Col... USER3	USER3	USER3	String	No Transformation
Source Table Col... USER4	USER4	USER4	String	No Transformation
Source Table Col... USER5	USER5	USER5	String	No Transformation
Source Table Col... USER6	USER6	USER6	String	No Transformation
Source Table Col... USER7	USER7	USER7	String	No Transformation
Source Table Col... USER8	USER8	USER8	String	No Transformation
Source Table Col... USER9	USER9	USER9	String	No Transformation
Source Table Col... __GROUPS__	__GROUPS__	__GROUPS__	String	No Transformation
Source Table Col... RECORD_COMPANY_NAME	RECORD_COMPANY_NAME	RECORD_COMPANY...	String	No Transformation
Source Table Col... RECORD_COMPANY_GUID	RECORD_COMPANY_GUID	RECORD_COMPANY...	String	No Transformation



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TIP: Avoid slow exports: Exporting Group memberships greatly extends the run time for exports with groups, so if you don't have them, then don't map `__Groups__` on the export map. This will speed up the export.

Merge Rules

Delimited File (csv or txt) Table: Contacts

ACT! Table: Contacts Display Mapped Only

To speedup the Contacts export 30X, don't export group memberships

Merge Source	ACT! (source) Field or Value	Delimited File (csv or ...	Data Type	Transformation Rule
Source Table Col... >	USER1	USER1	String	No Transformation
Source Table Col... >	USER10	USER10	String	No Transformation
Source Table Col... >	USER2	USER2	String	No Transformation
Source Table Col... >	USER3	USER3	String	No Transformation
Source Table Col... >	USER4	USER4	String	No Transformation
Source Table Col... >	USER5	USER5	String	No Transformation
Source Table Col... >	USER6	USER6	String	No Transformation
Source Table Col... >	USER7	USER7	String	No Transformation
Source Table Col... >	USER8	USER8	String	No Transformation
Source Table Col... >	USER9	USER9	String	No Transformation
Source Table Col... >	RECORD_ID	RECORD_ID	String	No Transformation
Source Table Col... >	__GROUPS__	__GROUPS__	String	No Transformation
Source Table Col... >	RECORD_COMPANY_NAME	RECORD_COMPANY_...	String	No Transformation
Source Table Col... >	RECORD_COMPANY_GUID	RECORD_COMPANY...	String	No Transformation

Example 24: Filtered Export will Export data for only selected Contacts

This affects only Contacts, Notes, Histories, or Activities. Not the companies, Groups, users, or Opportunities tables.

Companies, Groups, users, or Opportunities Export runs will export ALL rows every time you select one of them.

OAK!Merge Version 17.1.2 Standard Edition and later supports exporting data from Act! for only the contacts in a specified group



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Filtered Exports limit exports to contacts in a group. It can be any Group name or the default name of: OAKMerge_Export

Any Group name can be used to filter an import or export

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Act!

Act! PAD File: C:\ACTDATA\ETS_Master_v20.pad

User Id: alan

Password: [Empty]

Group to filter contacts: importedACC_LIST

CHANGE MODE: Copy Up Copy Down Swap

MERGE DESTINATION

Type: Delimited File (csv or txt)

File: C:\4.csv

Delimiter: Comma

First Row Contains Field Names

Act! to CSV can be limited to contacts in any one group

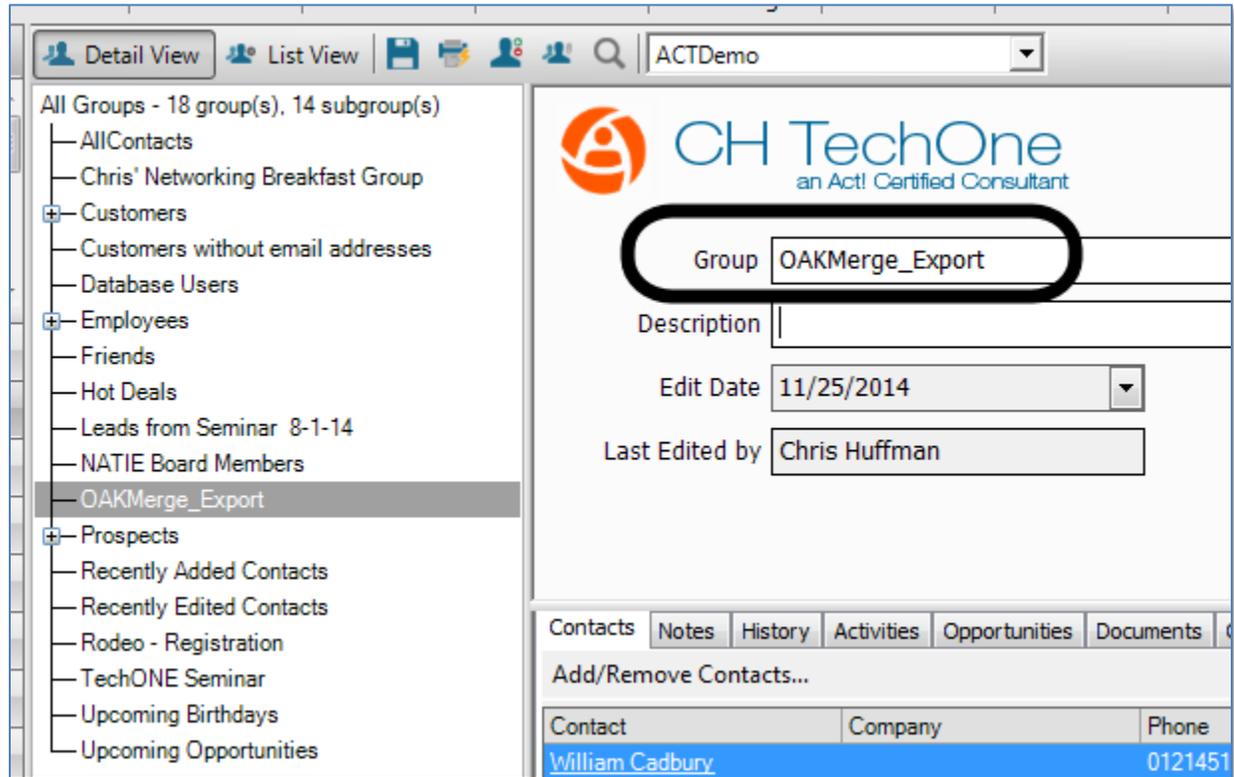
Or the default name of "OAKMerge_Export" will be used if it is found and a Group name to filter on was not specified.



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This will limit the exports to contacts or records linked to the contacts that are in a specific group or the default one called OAKMerge_Export. This can filter the Contacts; OR Notes, Histories, or Activities of those contacts in the group

Using a History export as an example there are 3 possibilities.

1. The OAKMerge_Export Group does not exist. You get all histories linked to all entities: Companies, Contacts, Groups, and Opportunities.
2. The OAKMerge_Export Group exists and is empty. This is the same as the Group does not exist: You get all histories and all links to all entities
3. The OAKMerge_Export Group exists and has 1 or more contacts. You get all histories linked but only to those contacts in the group. You only the histories and links contacts in the group; (not any histories linked to Companies, Groups, or Opportunities)



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For example if you had 50 contacts in the OAKMerge_Export group and you exported the history: only the history linked to those 50 contacts would export. **All exports are filtered this way if this group exists and has 1 or more contact members.** Both Static and Dynamic group memberships are used.

The Standard export for the ACTDEMO database that is not Filtered, will export 1462 rows of history. It has 397 Histories linked to Companies, 843 for contacts; 1 for Groups; and 221 for Opportunities. The export of all contacts via a Filtered export yields only the 843 history records for the contacts. The other history linked to Companies, Groups and Opportunities is NOT exported.

TIP: If you want history linked to contacts; but not the links of history to Companies, Groups, and opportunities; create a OAKMerge_Export Group with all contacts OR no contacts; and then do the history export. A dynamic group of "Create Date" "Contains data" will always have all contacts. This will export the history for all contacts, but not for the other entries.

TIP: Exporting Group memberships greatly extends the run time for exports with groups, so if you don't have them, then don't map __Groups__ on the export map. This will speed up the Contacts export. For example, 208 contacts in the Demo database went from 71 seconds to 3 seconds for the export.

TIP: The specified group name is saved in the profile for use with unattended merges running a scheduler



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Example 25: Filtered Import will Import data matching from a group of Contacts

A filtered **import** affects only Contacts. Not the Companies, Groups, Users, Notes, Histories, Activities or Opportunities.

The big advantage is speed and avoiding an out of memory error caused by checking all contacts to match on. When using a filtered import group, only those contacts are loaded into memory as the destination information. It is like the whole Act! Database was only the contacts in the group.

The screenshot shows a dialog box titled "Selecting Import Source and Merge Destination". It is divided into two main sections: "IMPORT SOURCE" and "MERGE DESTINATION".

IMPORT SOURCE:

- Type: Delimited File (csv or txt)
- File: C:\E Tech Systems\ACT\OAK!Merge 20\Samples\Contacts_10.csv
- Delimiter: Comma
- First Row Contains Field Names

CHANGE MODE:

- Buttons: Copy Up, Copy Down, Swap

MERGE DESTINATION:

- Type: Act!
- Act! PAD File: C:\ACTDATA\ETS_Master_v20.pad
- User Id: alan
- Password: (empty)
- Group to filter contacts: Pro Workshop Speakers

You can use any Group name or a special group called OAKMerge_Import. OAKMerge_Import exists, it will be used to filter the contacts. It does not have to be entered in the OAK!Merge field for "group to filter contacts".

Above is an example where only the contacts in a group called "Pro Workshop Speakers" would be used as the target/destination records.

TIP: Doing a trial run of just a few records takes about as long as doing all of them. When exporting History, Notes, or Activities; ALL the contacts in the group are read and ALL the history, notes, or activities are loaded into memory before it writes the first few you asked for in the trial.

TIP: If the group to filter contacts name is specified, it will be used – both for



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import and export.

If the group name is NOT specified, OAK!Merge will still be looking for the groups OAKMerge_Export while exporting and for OAKMerge_Import while importing.

TIP: The specified group name is saved in the profile for use with unattended merges running a scheduler

Example 26: Import and Export Data in XML Format

Import and Export data in XML format

XML format is supported for both imports and exports. Imports must be a simple data set. An XML file for use as a source may have more than one table, but only one may be selected to be use during a merge. This is similar to picking which table or query to use in an ACCESS database or which worksheet in an Excel workbook.

The XML format is an XML table. You can export and import using this format. You can open exported XML files "as an XML Table" in Excel. Do an export and open in notepad to see the raw format.

Extensible Markup Language (XML) is a markup language that defines a set of rules for encoding files in a format which is both human-readable and machine-readable.

Tip: OAK!Merge exports ALL data elements each time; but not all XML programs do. Some XML generators only include data elements IF DATA IS PRESENT. If you are using XML as a source for unattended merges; you will need the same data elements in the source file each time in order for the OAK!Merge profiles to work.



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Example; The contacts table exported to XML starts out as

```
Out_Contacts.xml - Notepad
File Edit Format View Help
<XMLWriterDataAccessProvider>
  <Contacts>
    <NAMEPREFIX></NAMEPREFIX>
    <FIRSTNAME></FIRSTNAME>
    <MIDDLENAME></MIDDLENAME>
    <LASTNAME></LASTNAME>
    <NAMESUFFIX></NAMESUFFIX>
    <SALUTATION>Triple J</SALUTATION>
    <FULLNAME>Lames Jawson</FULLNAME>
    <COMPANYNAME>HAL's Consulting Corp</COMPANYNAME>
    <DEPARTMENT>Space Frontier</DEPARTMENT>
    <JOBTITLE>Man In Charge</JOBTITLE>
    <BUSINESS_LINE1>10 Countdown Loop</BUSINESS_LINE1>
    <BUSINESS_LINE2>Monolithe 500</BUSINESS_LINE2>
    <BUSINESS_LINE3>Room 1001</BUSINESS_LINE3>
    <BUSINESS_CITY>Bogusta</BUSINESS_CITY>
    <BUSINESS_POSTALCODE>97800</BUSINESS_POSTALCODE>
    <BUSINESS_STATE>OR</BUSINESS_STATE>
    <BUSINESS_COUNTRYNAME>United States</BUSINESS_COUNTRYNAME>
    <BUSINESS_EMAIL>Lames.Jawson@jawson.email</BUSINESS_EMAIL>
    <BUSINESS_PHONE>(503) 555-2232</BUSINESS_PHONE>
    <BUSINESS_SUFFIX></BUSINESS_SUFFIX>
    <FAX_PHONE>(503) 555-1234</FAX_PHONE>
    <FAX_SUFFIX></FAX_SUFFIX>
    <MOBILE_PHONE>(503) 555-1212</MOBILE_PHONE>
    <PAGER_PHONE></PAGER_PHONE>
    <PAGER_SUFFIX></PAGER_SUFFIX>
    <ALTERNATE_PHONE></ALTERNATE_PHONE>
```

Or you can open XML exports as Table in Excel or ACCESS

Any XML from an OAK!Merge export can be opened in Excel as an XML Table

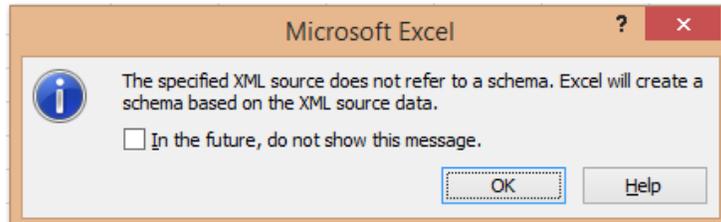
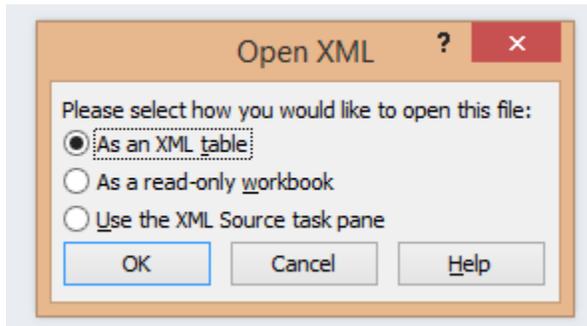


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IN EXCEL you get 2 questions, click on OK



A Contact export in XML, and opened in Excel looks like this

	F	G	I	J	K	
1	SALUTATION	FULLNAME	COMPANYNAME	DEPARTMENT	JOBTITLE	BUSINESS_LINE1
2	Triple J	Lames Jawson	HAL's Consulting Corp	Space Frontier	Man In Charge	10 Countdown Loop
3	Amanda	Amanda Form	A1 Services-US Operations		VP of Sales	2131 W. Tiny Rd.
4	William	William Buckley	Twelfth Dream		Chief Social Media Officer	2010 Act Way
5	Thomas	Thomas Andrews	Modern Electric Supply		President/CEO	1919 Tecoma Dr.
6	Mary	Mary Bailey	Liberty Savings & Loan		New Accounts	100 E Bayard St
7	Irene	Irene Murphy	Mears Insurance		CEO	172 Edison Street
8	Dan	Dan Minnick	Django Consulting		Captain	14 East St
9	Nathan	Nathan Cutting Brittles	Duke Industries			4075 Santa Monica Frwy
10	Morty	Morty Manicotti	Corleone's Pasta Company		Director of Manufacturing	8800 Pasta Way
11	Ann	Ann Goodall	A1 Services of UK		Chief Designer	Unit 34
12	Sean	Sean Duffy	Circle Photography		Sales Representative	Unit 43 Dobson Ind Est
13	Julie	Julie Miles	Robertson Joinery		VP of Sales	Dene Road
14	Rose	Rose Sayer	River Rat Tours		President	150 Lafayette St
15	Jordan	Jordan Benedict	Bick's Longhorns			Two Cavalry Row
16	Lucy	Lucy Connor	Studio Designs		Vice President Operations	Acorn Close
17			Sky Diving			
18	Ted	Theodore Barrett Jr	Verge Records	Studio 3	Chief Engineer	4589 N. Taylor St.
19	Carl	Carl Spackler	Golf Greens Extraordinaire		Director of Research	1800 Boca Club Drive
20	Albert	Albert Barry	Mercury Production Management		Chief Product Manager	66 Flash Rd.

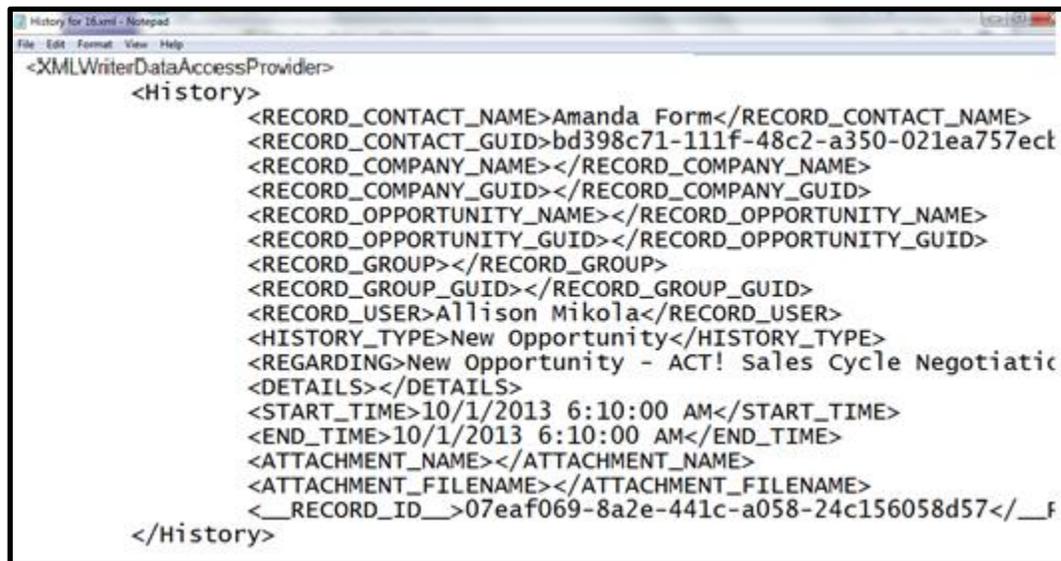


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A History export in XML, and viewed in Notepad looks like this



```
<XMLWriterDataAccessProvider>
  <History>
    <RECORD_CONTACT_NAME>Amanda Form</RECORD_CONTACT_NAME>
    <RECORD_CONTACT_GUID>bd398c71-111f-48c2-a350-021ea757ect
    <RECORD_COMPANY_NAME></RECORD_COMPANY_NAME>
    <RECORD_COMPANY_GUID></RECORD_COMPANY_GUID>
    <RECORD_OPPORTUNITY_NAME></RECORD_OPPORTUNITY_NAME>
    <RECORD_OPPORTUNITY_GUID></RECORD_OPPORTUNITY_GUID>
    <RECORD_GROUP></RECORD_GROUP>
    <RECORD_GROUP_GUID></RECORD_GROUP_GUID>
    <RECORD_USER>Allison Mikola</RECORD_USER>
    <HISTORY_TYPE>New Opportunity</HISTORY_TYPE>
    <REGARDING>New Opportunity - ACT! Sales Cycle Negotiat
    <DETAILS></DETAILS>
    <START_TIME>10/1/2013 6:10:00 AM</START_TIME>
    <END_TIME>10/1/2013 6:10:00 AM</END_TIME>
    <ATTACHMENT_NAME></ATTACHMENT_NAME>
    <ATTACHMENT_FILENAME></ATTACHMENT_FILENAME>
    <__RECORD_ID__>07eaf069-8a2e-441c-a058-24c156058d57</__f
  </History>
```



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Example 2: Delete History or Notes

Delete Specific history or note records.

OAK!Merge Standard or higher allows deleting specific history or notes entries (rows in the table) by specifying their ID number

You export the notes or history to find the ones you want to delete and use their IDs to specify which ones you want deleted

The export does respect the limit to contacts in the OAKMERGE_EXPORT group.

The only field you map is the ID of the history or note records.

Steps:

Export the history table

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: ACT!

ACT! PAD File: C:\Users\Alan\Documents\ACT\ACT Data\Databases\ACT2014Demo.PAD

User Id: [Empty]

Password: [Empty]

CHANGE MODE: Copy Up Copy Down Swap

MERGE DESTINATION

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 17\Samples\History_to_Delete_18_1.csv

Delimiter: Comma

First Row Contains Field Names



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Merge Rules

Delimited File (csv or txt) Table: History

ACT! Table: History

Merge Source	ACT! (source) Field or Value
> Source Table Column	RECORD_CONTACT_NAME
Source Table Column	RECORD_CONTACT_GUID
Source Table Column	RECORD_CONTACT_ID
Source Table Column	RECORD_COMPANY_NAME
Source Table Column	RECORD_COMPANY_GUID
Source Table Column	RECORD_OPPORTUNITY_NAME
Source Table Column	RECORD_OPPORTUNITY_GUID
Source Table Column	RECORD_GROUP
Source Table Column	RECORD_GROUP_GUID
Source Table Column	RECORD_USER
Source Table Column	ACTIVITY_TYPE
Source Table Column	HISTORY_TYPE
Source Table Column	REGARDING
Source Table Column	DETAILS
Source Table Column	START_TIME
Source Table Column	END_TIME
Source Table Column	ATTACHMENT_NAME
Source Table Column	ATTACHMENT_FILENAME
Source Table Column	__RECORD_ID__



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Open the output file in excel. Delete the rows you want to keep in Act! Create a new CSV with only the rows you wish to delete.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
RECC	RECC	RECC	RECORD_COMPANY_NAME	RECORD_ID	RECORD_ID	RECORD_ID	RECORD_ID	RECORD_ID	RECORD_USER	ACTIVITY	HISTORY_TYPE	REGARDING	DETAILS	START_TIME
1			Freemont Corp	59134f70-ce89-4730-bb93-37435f5ebd35					Allison Mikola		Opportunity Won	Home Office \$12,000.00 Clo	{\rtf1\ansi\ansicpg1252\deff0	7/30/2014 1
2			Circle Photography	5446d914-17a2-4ef9-9ad6-7453fa464ef6					Chris Huffman		Opportunity Won	Plano Plant \$12,000.00 Clo	{\rtf1\ansi\ansicpg1252\deff0	4/18/2014 1
3			Circle Photography	5446d914-17a2-4ef9-9ad6-7453fa464ef6					Allison Mikola		New Opportunity	New Opportunity - ACTI Sales Cycle Commitment to Buy 100		4/18/2014 1
4			Circle Photography	5446d914-17a2-4ef9-9ad6-7453fa464ef6					Allison Mikola		New Opportunity	New Opportunity - ACTI Sales Cycle Needs Assessment 25%		4/18/2014 1
5			Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		New Opportunity	SC - ACTI Sales Cycle Negotiation 65%		1/5/2014 1
6			Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		Opportunity Won	New Opportunity \$12,000.00 Clo	{\rtf1\ansi\ansicpg1252\deff0	5/17/2014 1
7			Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		New Opportunity	New Opportunity - ACTI Sales Cycle Initial Communication 1		1/4/2014 1
8			Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		Opportunity Won	New Opportunity \$9,000.00 Clo	{\rtf1\ansi\ansicpg1252\deff0	5/17/2014 1
9			Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		New Opportunity	New Opportunity - ACTI Sales Cycle Commitment to Buy 100		1/2/2014 1
10			Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		New Opportunity	New Opportunity - ACTI Sales Cycle Commitment to Buy 100		1/2/2014 1
11			Black Forest Baking	3db9da29-d59d-44b8-b77c-e4683aebef67					Ernst Anderson	Call	Call Completed	Cold Call		10/22/2014
12			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		7/2/2014 1
13			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		7/7/2014 1
14			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		4/7/2014 1
15			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		New Opportunity	New Opportunity - ACTI Sales Cycle Sales Fulfillment 100%		10/2/2014
16			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		New Opportunity	Parts for Bakery - ACTI Sales Cycle Presentation 40%		4/18/2014 1
17			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman		New Opportunity	New Opportunity - ACTI Sales Cycle Negotiation 65%		7/17/2014 1
18			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		10/1/2014 1
19			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman		New Opportunity	New Opportunity - ACTI Sales Cycle Initial Communication 1	#####	10/1/2014 1
20			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		1/7/2014 1
21			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		New Opportunity	New Opportunity - ACTI Sales Cycle Negotiation 65%		4/18/2014 1
22			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman		New Opportunity	New Opportunity - ACTI Sales Cycle Initial Communication 1		4/18/2014 1
23			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		Opportunity Won	New Opportunity \$2,000.00 Clo	{\rtf1\ansi\ansicpg1252\deff0	11/14/2014
24			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		New Opportunity	SC - ACTI Sales Cycle Needs Assessment 25%		4/18/2014 1
25			Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman		Field Changed	Field ID/Status changed from "C		1/2/2015 1
26			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	Field Waiting for Service change	1/3/2015 1
27			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Contact Linked	Contact Bettie James linked		12/1/2014 1
28			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Contact Linked	Contact Bettie James linked		12/1/2014 1
29			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Allison Mikola	To-do	To-do Done	Prepare Quote		4/10/2014 1
30			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Contact Linked	Contact Emily Dunn linked		12/1/2014 1
31			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	Field Waiting for Service change	1/3/2015 1
32			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Contact Linked	Contact Emily Dunn linked		12/1/2014 1
33			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	Field Waiting for Service change	1/3/2015 1
34			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	Field Waiting for Service change	1/3/2015 1
35			Boomer's Artworx	e3833c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	{\rtf1\ansi\ansicpg1252\deff0	11/14/2014
36			Green Plastics	c181abec-9f97-435f-a20d-1cfa358e2b31					Chris Huffman		Opportunity Stage Update	LA Office - ACTI Sales Cycle: Needs Assessment 25%		4/10/2014 1
37			Green Plastics	c181abec-9f97-435f-a20d-1cfa358e2b31					Chris Huffman		Contact Linked	Contact Benjamin Braddock linked		4/10/2014 2

Run another merge to Delete the history for the IDs in your edited file.

K	L	M	N	O	P	Q	R	S	T
ACTIVITY	HISTORY_TYPE	REGARDING	DETAILS	START_TIME	END_TIME	ATTACHM	ATTACHM	RECORD_ID	
1	Contact Linked	Contact Bettie James linked		12/1/2014 13:31	#####			fe943559-7f31-4358-b769-7431400d32e6	
2	Contact Linked	Contact Bettie James linked		12/1/2014 13:26	#####			11c24c44-ed33-46c2-aadd-82d555d75213	
3	Contact Linked	Contact Emily Dunn linked		12/1/2014 13:26	#####			d3589957-0405-4263-a00b-b49bf269ad96	
4	Contact Linked	Contact Emily Dunn linked		12/1/2014 13:31	#####			8b05e77e-5922-4a9b-b364-da74a101ca4e	
5	Contact Linked	Contact Benjamin Braddock linked		4/10/2014 23:53	#####			a191afa7-06f9-41a3-81bf-32e2a2d513af	
6	Contact Linked	Contact <empty> linked		4/10/2014 23:54	#####			227a368c-18a3-4066-a635-551ce14e6418	
7	Contact Linked	Contact Elaine R. Braddock linked		4/10/2014 23:53	#####			410723f9-b893-4094-bb80-5faf6cbf78e0	
8	Contact Linked	Contact Mr. McGuire linked		4/10/2014 23:53	#####			b8d750c0-db1c-459f-8a46-adb7c556e884	
9	Contact Linked	Contact Chris Huffman linked		5/1/2014 19:03	#####			535b832f-9b61-4bfo-9945-94bb095836e9	
10	Contact Linked	Contact Chris Huffman linked		4/30/2014 12:34	#####			c5d8bad-d-9089-4de3-9a91-3e9df85c3d27	
11	Contact Linked	Contact Keifer Saccucci linked		5/6/2014 18:22	#####			633b5f6c-9c3c-471c-9dff-c59397d3b3aa	
12	Contact Linked	Contact Bella Minoal linked		12/1/2014 13:29	#####			3e3e6b8e-3591-44ef-9545-629a9aea0890	
13	Contact Linked	Contact Bella Minoal linked		12/1/2014 13:31	#####			89fe11f5-28b5-4174-9660-c006486f8717	
14	Contact Linked	Contact Bella Minoal linked		12/1/2014 13:30	#####			0d27d1c4-bf27-40f4-b7f8-f7780ff52d6f	
15	Contact Linked	Contact Suzie Lee linked		5/6/2014 18:22	#####			b523ca84-2822-4a8a-8ff8-a8f63f54cad7	
16	Contact Linked	Contact Jason Mighty linked		4/23/2014 11:25	#####			5a93c26b-5926-480c-a75f-05985a735a5f	
17	Contact Linked	Contact Howard Smith linked		4/23/2014 11:25	#####			859b5ecd-15e3-4cc3-b576-1f6d571cba25	
18	Contact Linked	Contact Melissa Weather linked		4/23/2014 11:23	#####			dc42a6f5-9127-4db4-a49d-9f249528f530	
19	Contact Linked	Linked to company AVB Enterprises		5/6/2014 18:22	#####			b9ccce24-e7ca-477f-88d0-5a6e550688ca	
20									
21									
22									
23									
24									



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The only field you will map is the last column. `__RECORD_ID__`

Run an import: CSV to Act!

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: C:\E Tech Systems\ACT\OAK!Merge 17\Samples\History_to_Delete_18_1.csv

Delimiter: Comma

First Row Contains Field Names

CHANGE MODE: Copy Up Copy Down Swap

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Alan\Documents\ACT\ACT Data\Databases\ACT2014Demo.PAD

User Id:

Password:

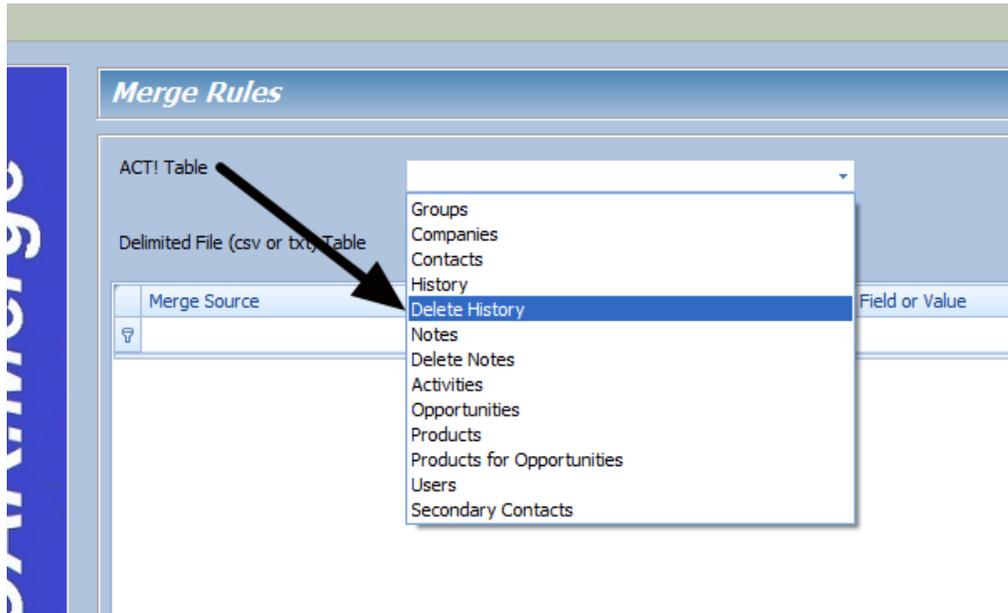


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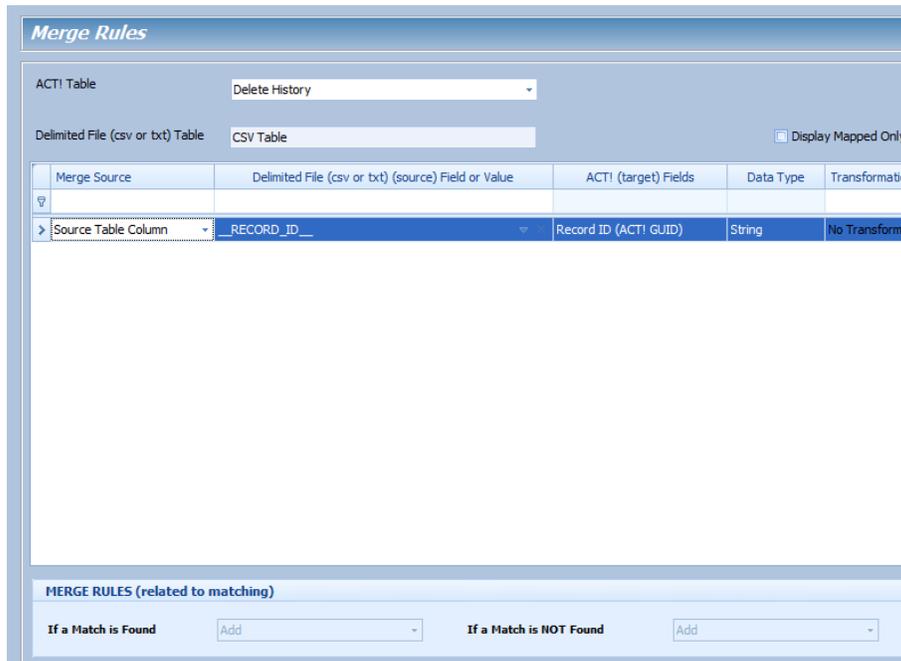


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Select "Delete History" as the target Act! Table



Map the one field: __RECORD_ID__



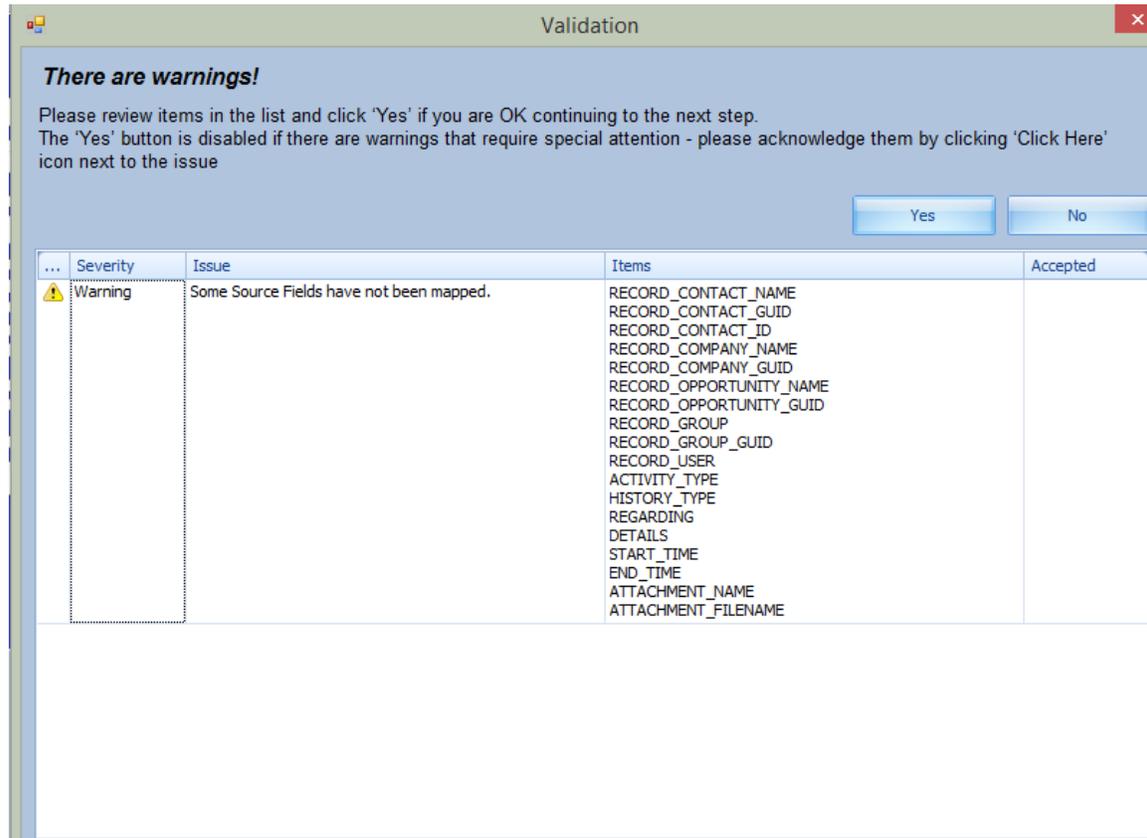


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Click Yes for warnings that some field are not mapped.



Special Note: the results page will show "Added" instead of "Deleted". The counter seems off, but the deleting works correctly. OAK!Merge is internally adding the records to a special routine that deletes them. The counter is used for all merges and in this case, the results presented are not intuitive. Unfortunately it cannot be changed based on the type of merge. The records are deleted even though they are counted as "added".

NOTES are done the same way.
Export the Notes table, then pick the ones to delete, import to "Delete Notes" table.



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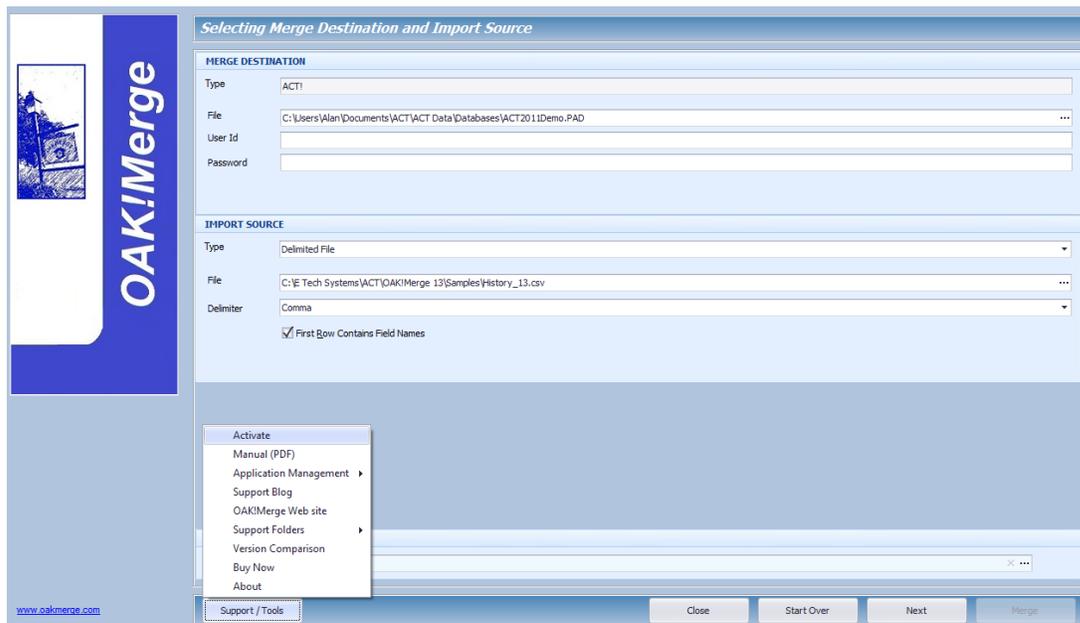
Section 4: Activation

Activation is required to unlock the software. It ties it to a specific PC. Upgrading to a newer version or to a more powerful version requires the purchase of a license. This license ID and password will activate the software so it will function.

Starting in 2020, all licenses are subscription based and automatically renewed each year unless cancelled before renewal date. Licenses/Usage is for up to a full year per renewal and is not refundable or prorated. Upgrades are now free to subscribers. They are included in the subscription. New IDs and passwords are not required. reactivation each year is not required.

Once you have your license ID and password, click on the Tools/Support button at the bottom of the wizard to activate the software.

Support/Tools, Activate



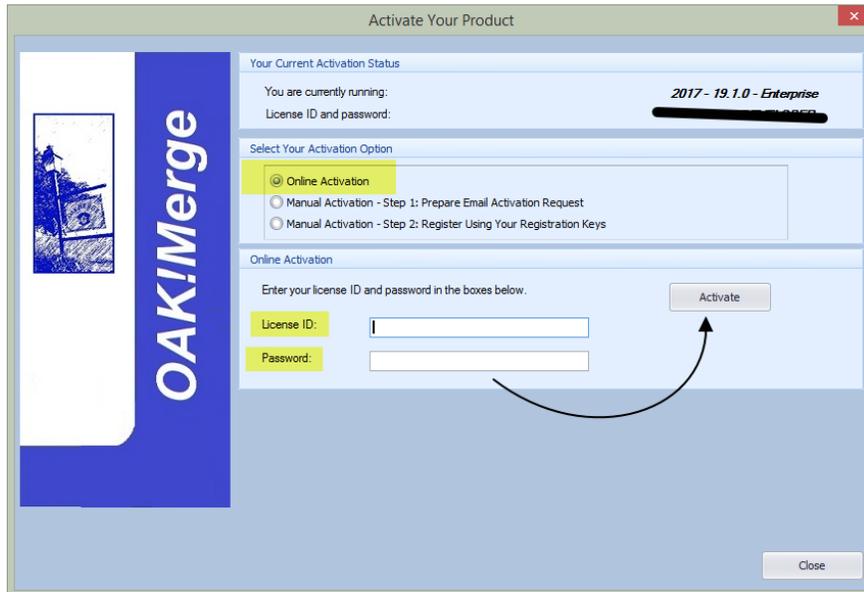


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Fill in the License ID and Password from your registration email.



If the PC is on the Internet, leave on the Online Activation method and then click on the Activate button.

Note the OAK!Merge.UI.EXE will establish a TCP connection to the license server to activate the product. This may trigger a message from your personal firewall. Click on Allow.



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If you cannot get temporary Internet access you will need to send an email with an email activation request. In less than 24 hours you will receive a response with your registration keys. The registration keys are not required if you can complete the online activation.

Enter your License Id, and password and click on prepare.

Activate Your Product

Your Current Activation Status

You are currently running: **2016 - 18.2.1 - Enterprise**
License ID and password: **3452345 NFR18lee**

Select Your Activation Option

Online Activation
 Manual Activation - Step 1: Prepare Email Activation Request
 Manual Activation - Step 2: Register Using Your Registration Keys

Prepare Activation Request

Enter your license ID and password in the boxes below.
Click the Prepare button, then copy and paste the info displayed into an email to send to support@OAKMerge.com.

License ID:
Password:

Prepare

Product version: 18.2.1 - Enterprise
License ID: 1234567890
Password: PASSWORD
Request ID: 303337926
Computer ID: 54115330
Please email the above info to support@oakmerge.com.
It is ready to paste into an email.

Close

Paste Email Activation Request info into an email and send to support@oakmerge.com with your name and purchase date.

Note: the manual email request above is NOT required if you can successfully do online activation.



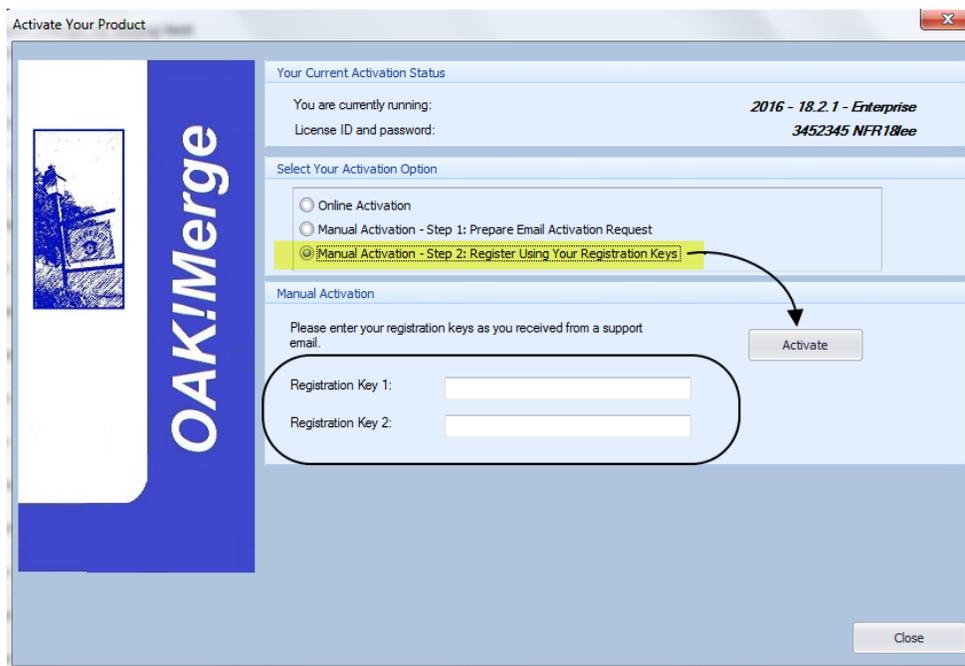
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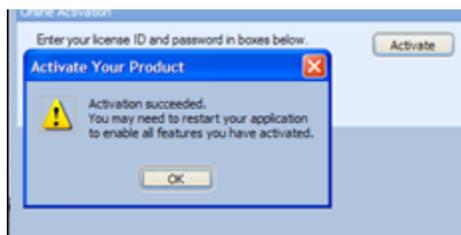
Email your Activation info to Support@OAKNerge.com. They will send you back 2 Registration Keys for you to enter in Step 2.

Click on the Activate button



When you have successfully done an online activation or registered manually, you should get a: Activation succeeded message box

You may have to close **OAK!Merge** and restart to use new features.



The Trial warning should be gone.



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Section 5: Support Policy

OAK!Merge includes limited no-charge technical assistance and support for the current version of OAK!Merge via email. Free Phone support or training is not included in the purchase. **You can call us for a five-minute support call for free; if you get stuck or need some advise.**

Many questions are Act! or process related and can best be served by your dealer and/or an on-site consultant directly. The dealer who sold the software should be the first call for help or support.

Paid Telephone Technical Support is also available:

Call 1-847-352-4770 Monday through Friday 9:00 a.m. to 5:00 p.m. CST to request paid support.

Fee: Telephone Support is \$150 per hour. 1 hour minimum.

Help desk accepts Visa, MasterCard, AMEX and Discover Card.

Email your Technical Support Requests to: support@oakmerge.com

Use Tools/Support; Activation; email activation request to reactivate OAK!Merge on a different PC. You must uninstall OAK!Merge from the old PC, before installing and activating it on a new PC



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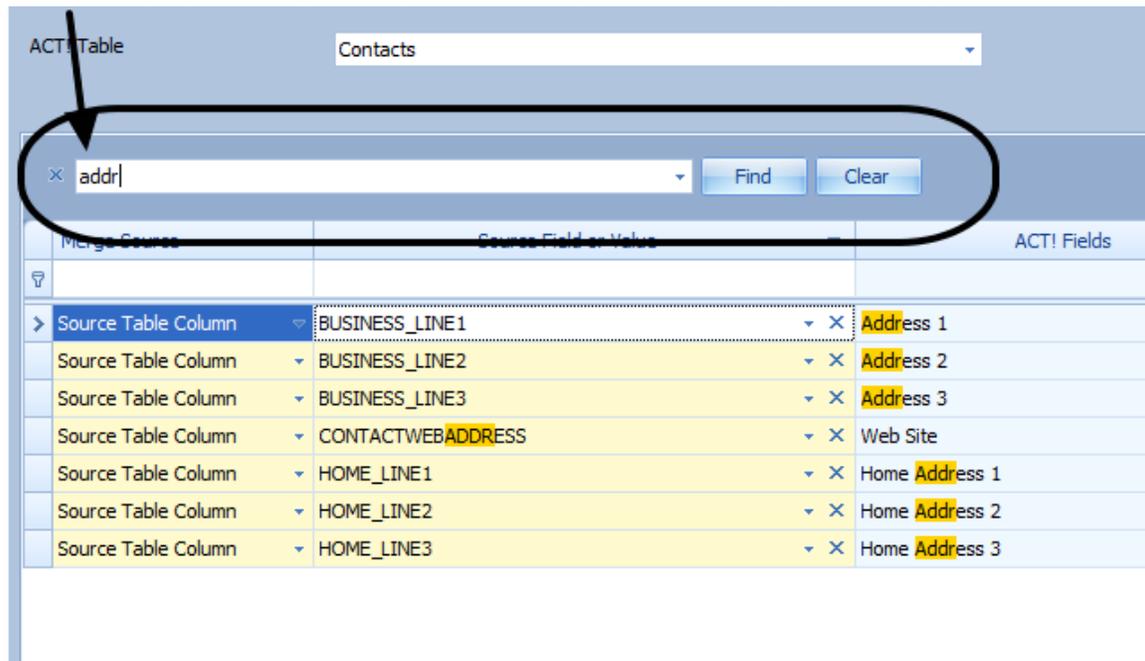
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Section 6: Appendices

Appendix 1: Filters for Mapping view

Information displayed in the mapping screen can be filtered to display needed info. There is a Filter Row with active Filters on columns at the top of the Mapping screen. This is different than the CTRL- F feature to do a quick find of a word.

CTRL F keys press together (hold Ctrl key down and tap the F key)



The Filter row allows filtering on some of the columns

Typing addr for the Act! fields will list only fields that contain addr



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Merge Source	Source Field or Value	ACT! Fields	Data Type	Required
		addr		
Source Table Column	BUSINESS_LINE1	Address 1	String	
Source Table Column	BUSINESS_LINE2	Address 2	String	
Source Table Column	BUSINESS_LINE3	Address 3	String	
Source Table Column	HOME_LINE1	Home Address 1	String	
Source Table Column	HOME_LINE2	Home Address 2	String	
Source Table Column	HOME_LINE3	Home Address 3	String	

But the Data Type field uses a filter list to one or more possible values to be selected

ACT! Fields	Data Type	Required	Transformation Rule
	(Select All)		
	Boolean		transformation
	DateTime		transformation
	Decimal		transformation
	Int32		transformation
	String		transformation
	String		No transformation
	String		No Transformation
	String		No Transformation
	String		No Transformation

TIP: Field names in the source file may be different in the mapping for OAK!Merge if needed. Since no blank or duplicate field/column names are allowed by OAK!Merge; any of those will be changed.

The logic is if one or more columns match, then a number suffix is added to the dups: _1 _2. If you had 3 fields called STATE in your source, OAK!Merge would use STATE, STATE_1, STATE_3

If you see one or more Field# (# is the new column number in the source), then



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you can assume you had some rows of data not fall into the same column as other rows, ... and some new columns were created. The data "walked..." and got pushed to the right into the wrong columns.

If there is NO header row exists, the fields will be Called Field1 Field2 Field3...

Appendix 2: Contact Name update rules: Pre fix, Suffix

Importing or updating Contact Names has some special rules because of the way Act! works. In Act! you enter Contact names, then Act! will guess at the First name, Middle name and Last name. If the first part of the contact name matches an item on the Act! list of Prefixes, it will be used as a Prefix, not a First name. If the last part of the contact name matches an item on the Act! list of Suffixes, it will be used as a Suffix, not a Last name. Users can manually override the choice name by Act! for First Name, Middle Name and Last Name.

Use Caution When Updating Contact Names: First Name, Last Name, Prefix, Suffix are **not** updatable as individual fields. You can update the entire contact field, not parts of it. Use First Name, Middle Name and Last Name fields only when adding new contacts or replacing the entire contact field. This means you cannot match on just last name for example. And if you update last name, you need update any of part of the name in use including: prefix, first name, middle name, last name, and suffix,

Users and OAK!Merge **CANNOT** pick or update how Act! parses the contact name.

When using an **OAK!Merge** action that updates the Contact field, **OAK!Merge** automatically updates the First Name, Last Name, and Salutation fields according to **Act!** Preferences for Names. This will over write any manual choices the user previously made for First name, Middle name , or Last name for that contact

Contact names can be blank, but a period is inserted as the last name as a place holder. It can be deleted in Act!."



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Note the Act! Web API, Act! Connect, and Act! 365 have different rules.

TIP: the Prefixes and Suffixes MUST exist in the Name Preferences Lists in ACT

Example import / test of Prefixes and Suffixes

TEST CSV FILE Contents as viewed in notepad

```

ID STATUS,Prefix,First Name,Middle Name,Last Name, Suffix,
P_TEST,1,2,3,4,5
P_TEST,Mr.,John,M,Smith,Jr
P_TEST,Dr.,Joe,b,Cool,III
P_TEST,Dr
P_TEST,,bob,,jones

```

Results in ACT

The row for "1,2,3,4,5" were not in the Name Preferences Lists in Act! and did not get into the Prefix/Suffix fields in ACT

Contact	Name Prefix	First Name	Middle Name	Last Name	Name Suffix
Dr .	Dr				
1 2 3 4 5		1	2 3 4	5	
Dr. Joe b Cool III	Dr.	Joe	b	Cool	III
bob jones		bob		jones	
Mr. John M Smith Jr	Mr.	John	M	Smith	Jr

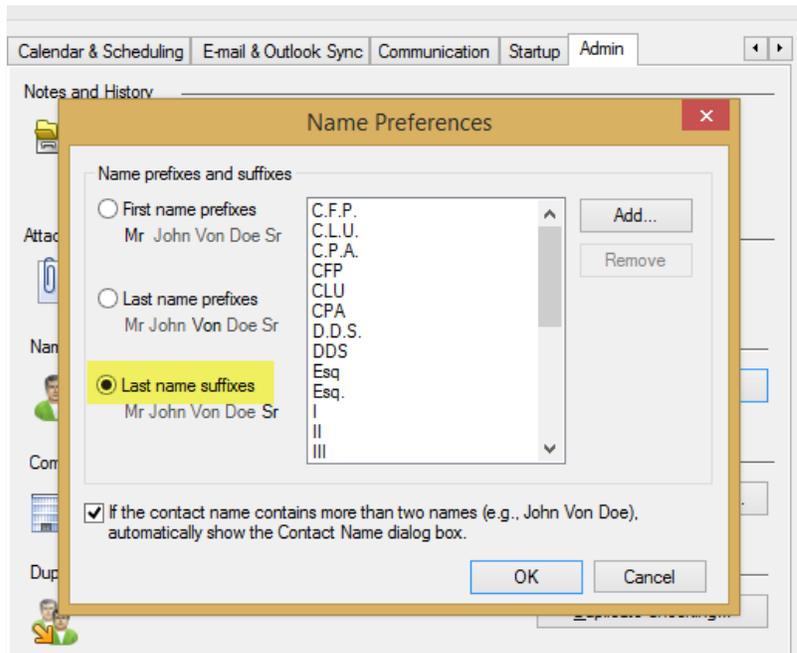
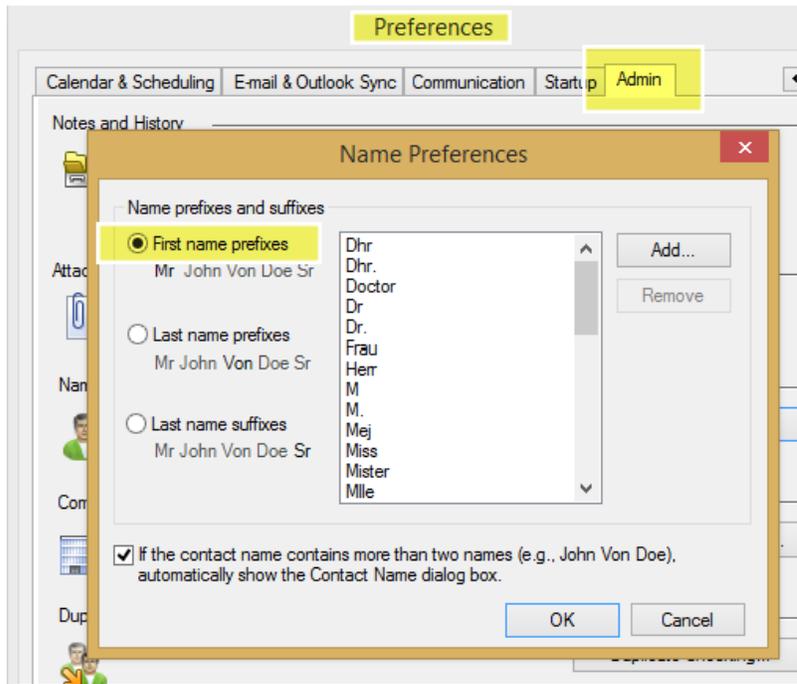
Set the Prefixes and Suffixes Names lists in Act! under: Preferences, ADMIN TAB, "Name Preferences" Button



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Appendix 3: Source and Destination path options: UNC and URL locations

Import Source and Merge Destination locations can be local paths, mapped drives, or UNC paths to networks shares such as [\\Server\data\ACTDATA\Contact_Info.csv](http://Server/data/ACTDATA/Contact_Info.csv)
Appropriate permissions are required.

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: \\SERVER48\Data\Contacts_10.csv

Delimiter: Comma

First Row Contains Field Names

MERGE DESTINATION

Type: ACT!

ACT! PAD File: C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2014Demo.PAD

User Id: [Empty]

Password: [Empty]

Import Source locations can also be a valid Web URL such as http://www.oakmerge.com/downloads/Contacts_10.csv

If Login / password is required, then this access method will not work.



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Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: http://www.oakmerge.com/downloads/Contacts_10.csv

Delimiter: Comma

First Row Contains Field Names

TIP: Web URL paths are often CASE Sensitive. http:// is required for a valid web url (HTTPS is currently not supported)

A path to an FTP resource is not supported, but might be possible using a one line command with path and credentials.

Appendix 4: Log Files

Information from each merge is stored in the logs folder. The information in the results page is stored in a file ending in .htm and can be reviewed later. There are also the detailed logs ending in XML that have the details of each merge.

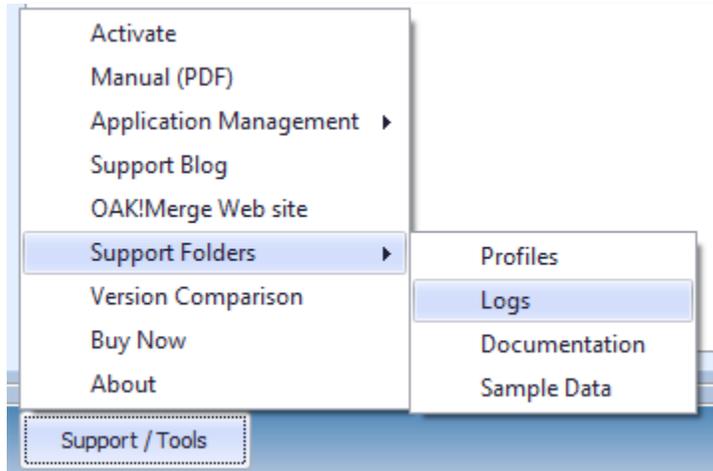
You can open and review them to see details of a merge operation. The log files have the info on which records skipped, added, deleted, or merged when FULL LOGGING is selected as the logging level.



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You can double click on them to see the results page of previous merges.

Tip: You can open the XML log with EXCEL to see which rows were Added, Merged, or Skipped. Look in column M or Subject.

	Level	LevelNumber	LevelClass	Category	Subject	Details
19	Information	11	Information	Merge Execution	Record 18 was merged.	#####
20	Information	11	Information	Merge Execution	Record 19 was merged.	#####
21	Information	11	Information	Merge Execution	Record 20 was merged.	#####
22	Information	11	Information	Merge Execution	Record 21 was added.	#####
23	Information	11	Information	Merge Execution	Record 22 was added.	#####
24	Information	11	Information	Merge Execution	Record 23 was added.	#####
25	Information	11	Information	Merge Execution	Record 24 was added.	#####

You can also use the Text to columns feature of EXCEL to split the Subject column into separate columns based on a delimiter of a space. This will give you the word Added, Merged, or Skipped in its own column.

After Text to Columns feature is used in EXCEL you have several new columns:



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	Level	LevelNumber	LevelClass	Category	Subject	Details	xml	Column1
19	Information	11	Information	Merge Execution	Record	18	was	merged.
20	Information	11	Information	Merge Execution	Record	19	was	merged.
21	Information	11	Information	Merge Execution	Record	20	was	merged.
22	Information	11	Information	Merge Execution	Record	21	was	added.
23	Information	11	Information	Merge Execution	Record	22	was	added.
24	Information	11	Information	Merge Execution	Record	23	was	added.

Sample log files from an OAK!Merge 12 installation.

C:\Program Files\E Tech Systems\OAK!Merge 12\Logs

Opened in Notepad

You can open the XML file in other programs or import into EXCEL to view.

batch3_200808200702.run.log

[2008-08-20 07:02:28:911 00000001] batch3: Loading profile

[2008-08-20 07:02:30:770 00000001] Validating the definition

[2008-08-20 07:02:30:802 00000001] Execution begins

[2008-08-20 07:02:31:270 00000001] Execution finishes

[2008-08-20 07:02:31:286 00000001] See detailed execution log at C:\Program Files\E Tech Systems\OAK!Merge 10\Logs\batch3_200808200702.htm: Execution complete

batch3_200808200702.xml

below shows 10 records from the source file were read and 4 new contacts were added while the 6 matched records were NOT updated. They were set to skip on match in the stored profile.

You can open the XML file in other programs or import into EXCEL to view.



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-----SNIP Below is from the end of the XML file-----

```
<Subject>Import for table Contacts has completed with warnings.</Subject>
<Details xml="Y"><EndTableProcessing> <Table table="Contacts" sourceTable="CSV Table" />
<Numbers tgtRows="179" rowsProcessed="10"> <ByStatus noErrors="9"
withWarnings="1" withErrors="0" /> <ByAction added="4" updated="0" deleted="0"
skipped="6" dedupedFromSource="0" /> </Numbers> </EndTableProcessing></Details>
</LogEntry>
<LogEntry>
<RequestThread>00000001</RequestThread>
<RequestThreadIndex>0</RequestThreadIndex>
<RequestDate>2008-08-20</RequestDate>
<RequestTime>07:02:31:270</RequestTime>
<RequestThreadIdentity />
<Level>Information</Level>
<LevelNumeric>11</LevelNumeric>
<LevelClass>Information</LevelClass>
<Category>Merge Controller</Category>
<Subject>Merge process successfully finished.</Subject>
<Details />
</LogEntry>
</xmlLog>
```



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Appendix 5: Valid Data and Formatting for various Data Types

OAK!Merge can successfully process data which is in ASCII or UTF-8 format. A file with an invalid UTF-8 character may not be readable by OAK!Merge. Data corruption can include this type of problem as well as other issues.

When importing Delimited files, alternate formats can be used. You can specify different file encodings for delimited files (CSVs or TAB Delimited)

- ASCII
- Unicode
- UTF7
- UTF8
- UTF8 No BOM

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: Delimited File (csv or txt)

File: [Empty]

Delimiter: Comma

First Row Contains Field Names

Encoding: Unicode

CHANGE MODE

MERGE DESTINATION

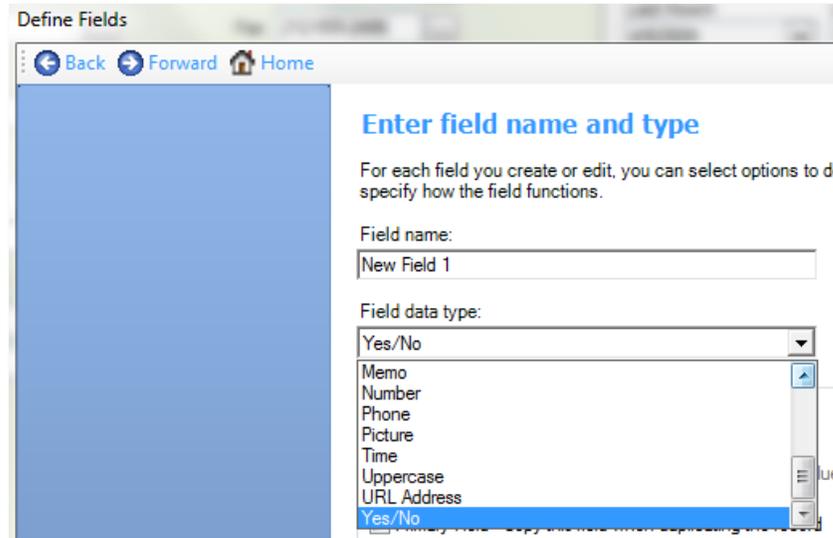
Valid data formats for data types are controlled by what Act! will accept.



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Act! has these data types for fields that OAK!Merge can update

Characters, Initial-Caps, Lowercase, Uppercase, Address, and email:

These are plain text fields with no formatting. The data must be printable characters. If the source is too long, it will be truncated and the first part used. A warning is logged if warnings or full logging is selected.



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Currency and Numbers:

Currency and numbers fields will accept positive and negative numbers. Do not use commas or \$ dollar signs.

123.45
50000
10
(22.22)
-33.33
-4

Yes/No:

Yes/No fields are for Checkboxes. They are Boolean for the condition: are they checked? Yes or no?

Yes	Y	1	True
No	N	0	False

Memo:

Holds up to 64,000 Characters

Date:

USA Settings are
12/31/2003 1/22/1996 07/04/1776

Date /Time:

Examples: 12/31/2003 23:58 1/22/1996 3PM

12/30/2018T16:01:09 (it has a T separating the date and time)

- 12/30/2019 16:01:09 (it has a space separating the date and time)

Decimal:

Examples: 5 4.333 12345678

Phone

Dashes, no local country code

Examples: 312-555-1212 44-7-301-225

Time:

HRS:MIN:SEC

22:55:44 6:10 06:55:00



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URL:

URL are entered as a text string

www.CHTechONE.com www.oakmerge.com

OAK!Merge does not currently update these data types in Act!

- Calculated Field
- Annual Event
- Picture (you cannot update or blank them)
- Public / Limited Access lists

Appendix 6: Updating Fields with pull down menus

Updating Fields with pull down menus: single or multi-pick select
Also sometimes called "pick lists"

Delimit them with a semi comma, no spaces.

Check: **'Allow users to edit items in this list'**. See tip below

SAMPLE SOURCE FILE

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Company Contact		Phone	Title	Address1	Address2	City	State	ZIP	ACCT_ID	YTD_SALE	Credit Lim	AR Balanc	Pain Point		
2	Duke Indu	Nathan Cutting Brittles	310-622-1507		4075 Santa Monica F		Los Angel	CA		90029 A_0026	400000	50000	20000	Licensing;Roadmap;TBD		
3	Duke Indu	Marion Morrison	310-622-1501	Founder	4075 Santa Monica F		Los Angel	CA		90029 A_0027	500000	50000		Licensing		
4	Duke Indu	Kirby York	310-622-1506		4075 Santa Monica F		Los Angel	CA		90029 A_0028	600000	50000		Licensing;TBD		
5	Duke Indu	Ethan Edwards	310-622-1501		4075 Santa Monica F		Los Angel	CA		90029 A_0029	700000	50000		TBD		
6																
7																
8																

Pain Point
Licensing;Roadmap;TBD
Licensing
Licensing;TBD
TBD

Sample Mapping



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Merge Rules

ACT! Table:

Delimited File (csv or txt) Table:

Merge Source	Delimited File (csv or txt) (source) Field or Value	Matching Fields	ACT! (target) Fields	Data Type
> Source Table Column	Contact	<input checked="" type="checkbox"/>	Contact	String
Source Table Column	Company	<input checked="" type="checkbox"/>	Company	String
Source Table Column	Pain Point	<input type="checkbox"/>	Pain Points	String

RESULTS IN Act!

1 of 8

Company	Contact	Phone	Fax Phone	Mobile Phor	Address 1	User 1	User 2	User 3	Pain Points
Duke Industries	Nathan Cutting Brittles	310-622-1507	310-622-1587		4075 Santa Monica	4	A_0026		Licensing,Roadmap,TBD
Duke Industries	Stony Brooke	310-622-1502	310-622-1582		4075 Santa Monica				
Duke Industries	John Chance	310-622-1504	310-622-1584		4075 Santa Monica				
Duke Industries	Ethan Edwards	310-622-1501	310-622-1581		4075 Santa Monica	7	A_0029		TBD
Duke Industries	Sam McCord	310-622-1505	310-622-1585		4075 Santa Monica				
Duke Industries	Marion Morrison	310-622-1500	310-622-1580		4075 Santa Monica	5	A_0027		Licensing
Duke Industries	Rockwell Torrey	310-622-1503	310-622-1583		4075 Santa Monica				
Duke Industries	Kirby York	310-622-1506	310-622-1586		4075 Santa Monica	6	A_0028		Licensing,TBD



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Tip: For Multi Select, there is a required option within the Define Fields, 'Manage Drop Down Lists' section. When **'Allow users to edit items in this list'** is checked, the import completes successfully.

Define Fields

Back Forward Home

Details

Name: Operation
Type: Character
Created: 09/01/2017
9 items

Enter drop-down list name and type

Drop-down list name:
Operation

Type:
Character

Description (optional):

Allow users to edit items in this list

Automatically add new items users enter to the list

< Back Next > Finish Cancel

Appendix 7: Updating Microsoft Office System Drivers to support Access source files.

OAK!Merge uses the Office System Drivers that are installed on the PC for ACCESS, but not for Excel

You can add the support for Access 2007 to 2016 (accdb) using a update from Microsoft called "Microsoft Access Database Engine 2010 Redistributable"

Download At

<https://www.microsoft.com/en-us/download/details.aspx?id=13255>

This adds both Access drivers for 2007, 2010, 2016

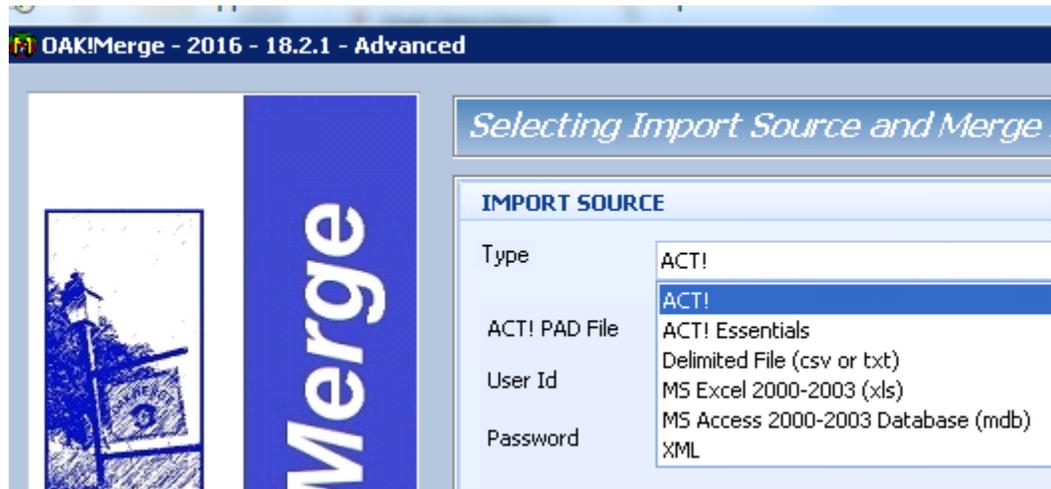


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The problem is the `accdb` option is missing as shown below



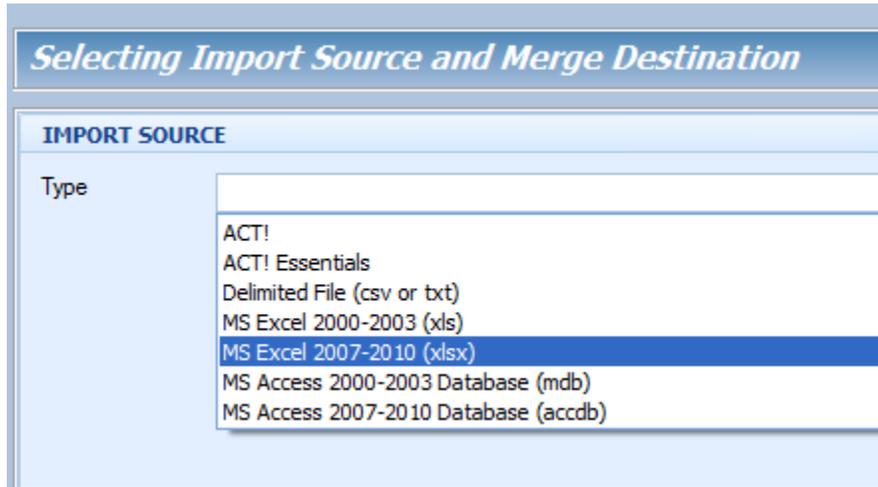


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With Office products or drivers installed you get more options:



Access, Excel 2007+ - <https://www.microsoft.com/en-us/download/details.aspx?id=13255>

Access, Excel 2003 - <https://www.microsoft.com/en-us/download/details.aspx?id=5793>

Appendix 8: Application Story: Create Contacts from Companies and retain Company notes; all done in the same Act! database.

How to create Contacts from Companies and retain Company notes (non-Contact notes) The basic approach is to export the Companies and Notes, then import them back in; linked together. Then you can delete the companies.

STEPS:

1. Export Companies to CSV
2. Export Notes to CSV; use transformation of RTF to Text, for the note field.
3. Delete all the Note rows/links to Groups and Opportunities.
4. Delete the Note rows/links that are duplicated for Company and Contact to create an edited CSV of only Notes that are linked to a Company, but not a contact.
5. Create a custom character field in Contacts named OAKMergeID Import the Contacts.



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6. Import the Companies.csv into Contacts; mapping the ContactID to OAKMergeID
7. Import the edited Notes.csv into Notes; linking them to the Contacts using OAKMergeID
8. Delete the Companies if desired.

Appendix 9: Application Story: Moving History, Notes, and/or Activities from one Act! Database to another

The basic approach is ETL: Extract, Transform, and Load

1. Export the info from the SOURCE to CSV
2. Clean up the CSVs
3. Import the CSVs into the TARGET Act! Database

Always Always Always... backup before doing merges!

The middle step to is to sort and then delete some not needed history like "contact deleted" in the CSVs. Or purge some date ranges.

Before you do a merge importing data, write the count of history, notes, and activities in the MY RECORD in the TARGET DATABASE of the user you are going to use in OAK!Merge for the import merge. If OAK!Merge cannot link something with the info or mapping you used, it will link it to the MY RECORD in the TARGET DATABASE. Of course, info from the my record in the source should be added to the MY RECORD in the target, but watch for a lot of strays (these are errors)

OAK!Merge Standard and above can do this. Don't use Act! to Act! for history or notes merges. Do and EXPORT of Act! to CSV, then an IMPORT of CSV into ACT. This will extract it from the old database and import it into the newer one. If you are using an Act! Backup, you need to do a "Restore As" to restore the backup so you can open it in Act!.

Note: You can do all or some the notes/history. When you use OAK!Merge on a Act! database; you can export the history or notes to CSV for only a group of contacts by putting the contacts in a group called OAKMerge_Export; or you can name the group to filter on when selecting the Act! database as the source.



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Activities are always set to do ALL activities in the database for ALL users for ALL contacts.

The history export will have multiple lines for the same entry if the history item was linked to several objects. (like Contact and Company) Use the linking columns in the CSV to get what you want. Delete the rows you don't need. The contact GUID is always unique. Linking and matching are case sensitive, so don't let excel change the case of the Contact/Record ID. It should be lower case. Sample:

```
RECORD_CONTACT_GUID
2d4435d3-1879-4743-ac59-03cce7f001dc
2d4435d3-1879-4743-ac59-03cce7f001dc
2d4435d3-1879-4743-ac59-03cce7f001dc
```

If the source info is a backup of the database you are importing into; the Contact GUIDs will be the same; so you can use the Record_Contact_GUID to LINK the history to the correct Contact. If the source info is NOT a backup of the database you are importing into will need use a different linking method. 2 popular methods are to used. Number 1 is to use the Contact Name to link on. It is the easiest. That is fine as long as there are not blanks or duplicate contact names in Act!.

The 2nd method is to create a custom Contact field in the target database called OAKMergeID. You then import the _Record_ID_ from the Contact table in the old database into it; matching on several fields like name, address 1, city or email. Once you get the old Contact IDs (called __RECORD_ID__ when exporting them) into the OAKMergeID field in the target database you can add history, notes, or activities LINKING them to the correct contact using the Record_Contact_GUID in the old history data to LINK TO: Contacts by OAKMergeID. Note the option to LINK To: Contacts by OAKMergeID does not show up until you create a custom field in the contact called OAKMergeID.

Any histories that don't find a contact to LINK to, will be linked to the MY RECORD of the user doing the import in OAK!Merge. So check the history in the MY RECORD before and after the merge. If they all link correctly; there is no change to the History in the MY Record. (Unless there were some histories for the MY RECORD in the source that should have been added to the MY RECORD)



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See the index at the end of the manual for more info on importing histories, notes, activities into Act!; or on LINKING, OAKMerge_Export and OAKMergeID.

Act! History Fields that are exported are:

History

history

Act! (source) Field or Value

- ▼ RECORD_CONTACT_NAME
- ▼ RECORD_CONTACT_GUID
- ▼ RECORD_CONTACT_ID
- ▼ RECORD_COMPANY_NAME
- ▼ RECORD_COMPANY_GUID
- ▼ RECORD_COMPANY_ID
- ▼ RECORD_OPPORTUNITY_NAME
- ▼ RECORD_OPPORTUNITY_GUID
- ▼ RECORD_OPPORTUNITY_ID
- ▼ RECORD_GROUP
- ▼ RECORD_GROUP_GUID
- ▼ RECORD_USER
- ▼ ACTIVITY_TYPE
- ▼ HISTORY_TYPE
- ▼ REGARDING
- ▼ DETAILS
- ▼ START_TIME
- ▼ END_TIME
- ▼ ATTACHMENT_NAME
- ▼ ATTACHMENT_FILENAME
- ▼ ATTACHMENT_SHORTCUT
- ▼ RECORD_ID

This is what items the history is LINKED to

Record ID is the ID of the history item and only used if you want to delete selected items

When importing, one option for linking is the use the GUID
Linking Act! History to Contacts using GUID to GUID is show below:



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Merge Rules

Act! Table:

Delimited File (csv or txt) Table: Display Mapped Only

Merge Source	Delimited File (csv or txt) (sou...	Act! (target) Fields	Data Type	Required	Transformation Rule
> Source Table Column	-	Link To: Contacts by Full Contact Name	String		No Transformation
Source Table Column	RECORD_CONTACT_GUID	Link To: Contacts by Act! GUID	String		No Transformation
Source Table Column		Link To: Contacts by OAKMergeID	String		No Transformation
Source Table Column		Link To: Companies by Company Name	String		No Transformation
Source Table Column		Link To: Companies by Act! GUID	String		No Transformation
Source Table Column		Link To: Companies by OAKMergeID	String		No Transformation
Source Table Column		Link To: Opportunities by Opportunity ...	String		No Transformation
Source Table Column		Link To: Opportunities by Act! GUID	String		No Transformation
Source Table Column		Link To: Opportunities by OAKMergeID	String		No Transformation
Source Table Column		Link To: Groups by Group Name	String		No Transformation
Source Table Column		Link To: Groups by Act! GUID	String		No Transformation
Source Table Column	RECORD_USER	Record Manager (Name, Login or GUID)	String		No Transformation
Source Table Column	HISTORY_TYPE	History Type (Result)	String	!	No Transformation
Source Table Column	REGARDING	Regarding	String		No Transformation
Source Table Column	DETAILS	Details	String		No Transformation
Source Table Column	START_TIME	Start Time	DateTime	!	No Transformation
Source Table Column	END_TIME	End Time	DateTime		No Transformation
Source Table Column	ATTACHMENT_NAME	Attachment Description	String		No Transformation
Source Table Column	ATTACHMENT_FILENAME	Attachment File Name	String		No Transformation
Source Table Column	ATTACHMENT_SHORTCUT	Attachment As Shortcut	Boolean		No Transformation



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Linking Act! History to Contacts using the SOURCE database GUID to the OAKMergeID field in the TARGET database.

Merge Source	Delimited File (csv or txt) (sou...	Act! (target) Fields	Data Type	Required	Transformation Rule
> Source Table Column		Link To: Contacts by Full Contact Name	String		No Transformation
Source Table Column		Link To: Contacts by Act! GUID	String		No Transformation
Source Table Column	RECORD_CONTACT_GUID	Link To: Contacts by OAKMergeID	String		No Transformation
Source Table Column		Link To: Companies by Company Name	String		No Transformation
Source Table Column		Link To: Companies by Act! GUID	String		No Transformation
Source Table Column		Link To: Companies by OAKMergeID	String		No Transformation
Source Table Column		Link To: Opportunities by Opportunity ...	String		No Transformation
Source Table Column		Link To: Opportunities by Act! GUID	String		No Transformation
Source Table Column		Link To: Opportunities by OAKMergeID	String		No Transformation
Source Table Column		Link To: Groups by Group Name	String		No Transformation
Source Table Column		Link To: Groups by Act! GUID	String		No Transformation
Source Table Column	RECORD_USER	Record Manager (Name, Login or GUID)	String		No Transformation
Source Table Column	HISTORY_TYPE	History Type (Result)	String	!	No Transformation
Source Table Column	REGARDING	Regarding	String		No Transformation
Source Table Column	DETAILS	Details	String		No Transformation
Source Table Column	START_TIME	Start Time	DateTime	!	No Transformation
Source Table Column	END_TIME	End Time	DateTime		No Transformation
Source Table Column	ATTACHMENT_NAME	Attachment Description	String		No Transformation
Source Table Column	ATTACHMENT_FILENAME	Attachment File Name	String		No Transformation
Source Table Column	ATTACHMENT_SHORTCUT	Attachment As Shortcut	Boolean		No Transformation

Appendix 10: Out of Memory Error

Very large databases or source files can trigger an out of memory error. OAK!Merge v24 and earlier was limited to a 32bit address space in memory for some operations. (v25 and later is 64 bit) Additional physical memory will not help. The amount of data in the fields you are mapping has a direct impact on the space used, so big text fields with a lot of data uses a lot more space than a date field. Here are some ways to get around an out of memory error if you are using v24 or earlier. .

1. Map less fields
2. Import in batches. (exporting in batches does not help)



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3. In updating contacts you can use a Group in ACT to reduce the size of the target. You could have a million contacts, but only load 10,000 in a group to match on for an import.
4. For exporting Notes or History, there are 2 options to try.
 - a. The first work around is to export them in batches using the Groups feature. Try splitting them in half. Export the history for half the contacts and then the other. Try name > m and then name <= m.
 - b. The second work around is to do it as separate databases: do a SAVE AS to the database, delete some the contacts, then export the remainder of the contacts; then repeat with a different group of contacts.

Sample Error screen, but they can vary

Importing table Contacts from CSV Table.
If you have Act! open, you may need to refresh the current view to see updated data.

Initial import numbers:	Rows in source table	603
	Rows in target table	524181

Import for table Contacts has completed with errors.

After import numbers:	Total rows processed	603
	Rows in target table	524231
By Status:	Rows processed successfully	337
	Rows processed with warnings	0
	Rows skipped due to errors	266
Merged rows summary:	Added to target	50
	Updated in target	281
	Deleted from target	0
	Skipped in source	0
	Duplicates in source	6

Additional details: Execution time: 45 min 5 sec

All Rows | Processed Completely

Record 109 could not be processed due to errors.

Exception of type 'System.OutOfMemoryException' was thrown.

Row:	First Name:	David
	Last Name:	[REDACTED]

Support / Tools



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Appendix 11: Updates and Upgrades

Updates are free and upgrades have a small cost. Updates are minor feature updates and bug fixes. Free Updates are provided for the current version of OAK!Merge. Upgrades have new features and are redone to work with the latest version of Act!

Maps can be used with newer versions. Mappings are XML files in the profiles folder of the previous version. They are not deleted when you upgrade, but can be manually copied to the new location

A Typical copy of Profiles and mappings for a v17 to v20 upgrade would be from to:

C:\E Tech Systems\ACT\OAK!Merge 17\Profiles
C:\E Tech Systems\ACT\OAK!Merge 21\Profiles

TIP: Update to the newest version of OAK!Merge you are licensed for. Those downloads are at www.oakmerge.com

TIP: After v20, it is OK to use a new OAK!Merge with an older version of Act! The reverse is not true.

Past Major Versions and their last update (dot releases are on the website)

11.1.4	14.5.2	19.1.3			
12.4.3	16.1.1	20.1.2			
13.3.3	17.2.2	21.1.3			
15.5.2	18.2.1	22.1.1			

Your upgrades are included in your annual subscription.

Send suggestions and corrections to support@oakmerge.com

This manual and additional lab exercises are being updated regularly. The Support blog has updates, news, tips and support questions and answers you can search: Updates and the support blog are at:



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www.oakmerge.com

Or in OAK!Merge under Tools/Support, Documentation, Online.

Support Blog has what's new in each release, plus tips, bugs, or case studies. Double click an entry or "read more" to expand it to see more info.

At www.oakmerge.com

OAK!Merge 1-847-352-4770

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Selecting Import Source and Merge Destination

IMPORT SOURCE	
Type	Delimited File (csv or txt)
File	Act! Act! Web API Act! Essentials
Delimiter	Delimited File (csv or txt) MS Excel (1997-2016 - xls, xlsx or xlsm) MS Access 2000-2003 Database (mdb) MS Access 2007-2016 Database (accdb)

Enhancements included in OAK!Merge for Act! 20.1.2

OAK!Merge 20.1.2 for Act! was released 3/5/18

Release Notes Summary

Enhancements included in OAK!Merge for Act! 20.1.2

1. Adds back support for XLS files. Includes new drivers to support XLS and XLSX files. There was a change in Microsoft updates that caused these to stop working. The new OAK!Merge drivers were rewritten for direct access of the files. Microsoft drivers are no longer required to access Excel files. There is a new XLS_XLSX_XLSM choice in the source menu.

Selecting Import Source and Merge Destination

IMPORT SOURCE

- March 2018
- January 2018
- November 2017
- October 2017
- September 2017
- March 2017
- January 2017
- March 2016
- December 2015
- September 2015
- July 2015
- February 2015
- October 2014
- June 2014
- September 2013
- May 2013
- March 2013
- December 2012
- October 2012
- September 2012
- August 2012
- April 2012
- March 2012
- February 2012
- November 2011



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Our Facebook page is at www.facebook.com/oakmerge/

Please "like" our page or leave a comment!

The screenshot shows the Facebook page for OAK!Merge. The page header includes the name 'OAK!Merge' and a search bar. Below the header are navigation tabs: Page, Inbox, Notifications, Insights, Publishing To..., and Ad Center. The main content area features a large advertisement for 'Import Export Utility for act!' with the OAK!Merge logo. To the right, a 'Merge Rules' configuration window is open, displaying a table with columns for 'Merge Source', 'Delim', and 'ACT! (target)'. A dropdown menu is open over the 'ACT! Table' column, listing various data sources such as Contacts, Groups, Companies, History, Notes, Activities, Opportunities, Products, Products for Opportunities, Users, and Secondary Contacts. The 'Contact' option is selected. Below the table, there are buttons for 'Liked', 'Following', 'Share', and a three-dot menu. At the bottom, there are options to 'Create Post', 'Live', 'Event', 'Offer', and 'Job', along with a text input field for writing a post.



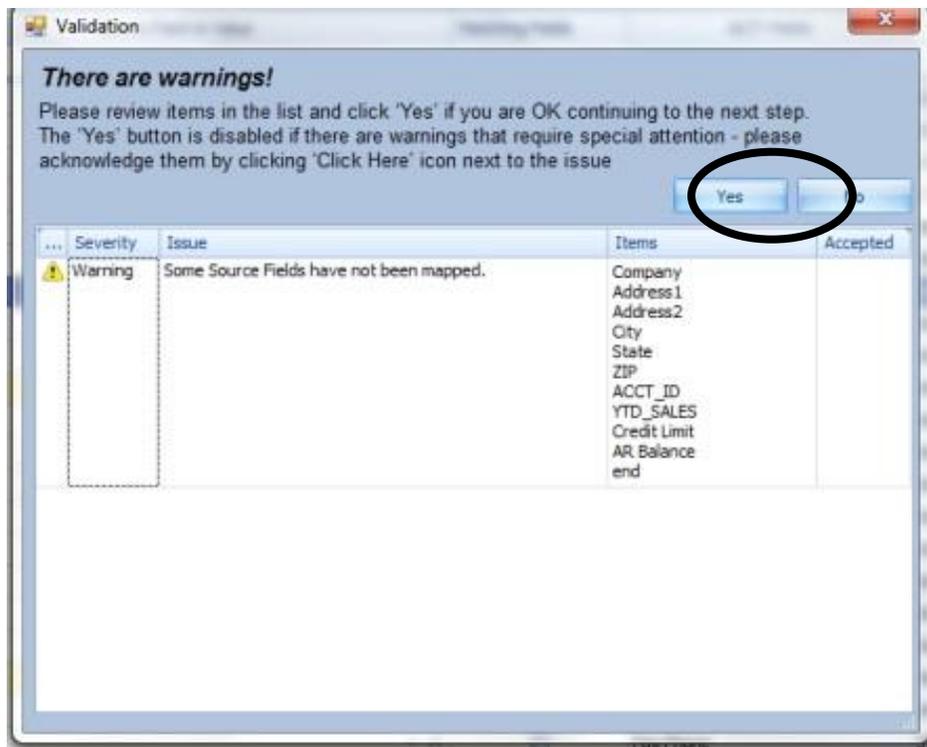
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weather you are adding, skipping, or updating; or not matching at all, which is adding/appending rows. For example, if you are updating and skipping Contacts you do NOT have to map the contact field, but if you ADD and contacts; you must map the contact field; even if all the contact names are blank.

If you do not map some of the fields in the source; you will get a warning: "Some fields have not been mapped"



You can click the "Yes" button and proceed to the next step (run) or No to return to the mapping screen.



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Appendix 15: Salesforce Data Migration Kit / Enterprise Edition

The Salesforce data migration kit converts a standard backup ZIP from Salesforce into an Act! database.

The Salesforce data migration kit includes all the Salesforce users, accounts, contacts, leads, tasks, activity history, notes, opportunities, and attachments. All this in a load and go, one click utility: OAK!Merge Enterprise. The Salesforce Data migration kit has a separate manual with a step by step check list.

It is a simple three step process:

1. Download and install the OAK!Merge Enterprise Edition with Salesforce Migration Kit per the instructions in the manual.
2. Unzip the contents of a full backup with attachments from Salesforce
3. Click Launch to Go!

The standard versions of Salesforce for Contact, Group, Professional, and Enterprise work with the Migration kit. However not all versions of Salesforce



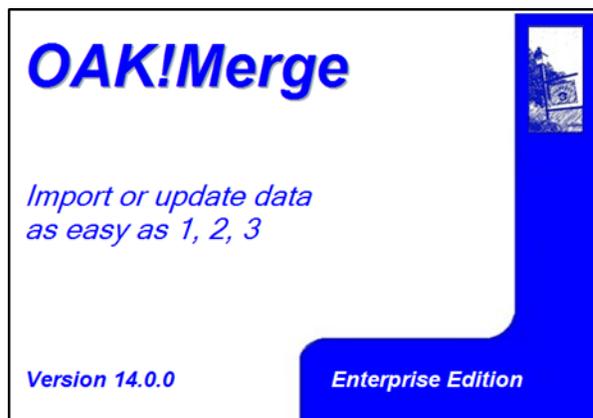
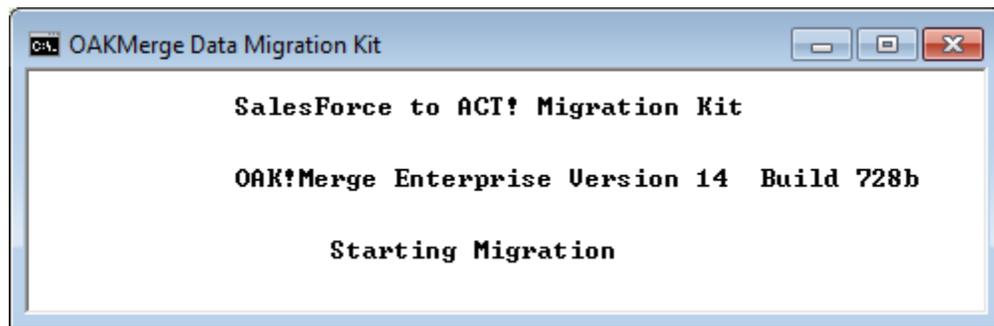
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have been mapped or tested. Special editions such as the Wealth Management or Not for profit editions of Salesforce have not been tested and will probably need adjustments to the standard field mappings supplied.

Several programs run to reformat the Salesforce data, then 35 merges are done.



OAK!Merge Enterprise with Salesforce Data Migration kit:

- Uses a standard data backup ZIP from Salesforce containing over 40 files and all the attachments.
- Imports the Users from Salesforce and creates Act! users, so the record managers in Act! will match the Owners in Salesforce.
- Converts the Accounts in Salesforce to Companies in Act!



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- Converts the Contacts in Salesforce to Contacts in Act! and links them to the Companies.
- Also converts the future tasks, activity history, opportunities, and attachments and cases.
- Includes all OAK!Merge Pro version features for use after the migration

What the Salesforce Data Migration kit brings in from Salesforce:

- Salesforce users
- accounts
- contacts
- leads
- opportunities
- tasks
- events
- activity history
- notes
- attachments
- cases

See www.OAKMerge.com for a current of tables in Salesforce that are migrated.

Each migration kit includes 1 hour of telephone support for setup and conversion efforts. Custom conversion support is available from Act! Consultants worldwide for an additional fee. The data migration kit does not import custom fields, hierarchies, reports, documents, cases, policies, or households. This type information can be imported by OAK!Merge Pro which is included. OAK!Merge Pro is an advanced powerful data import tool for technical users and consultants.



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