



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23



User Guide v25.1.1

**OAK!Merge for Act! is the
leading
data import, export, and
update utility for**



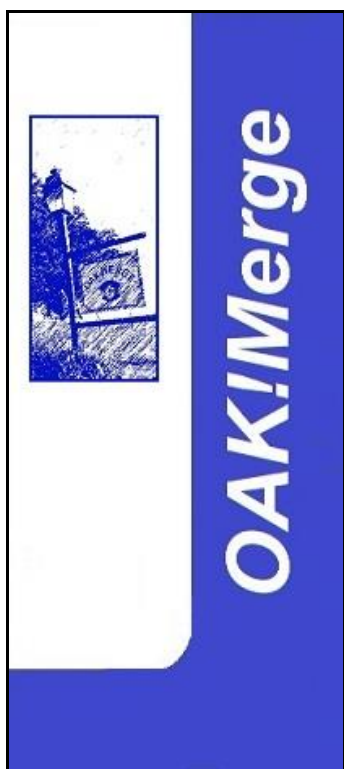


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Table of Contents

| | |
|---|------------|
| Preface | 6 |
| Section 1: Overview of OAK!Merge | 7 |
| Section 2: Using the OAK!Merge Wizard | 8 |
| Example 1: Merge FROM a CSV to Act! Contact Fields | 9 |
| Step 2 of 4: Select the Source and Destination | 19 |
| Step 3 of 4: Select Target Table and Map Fields | 22 |
| Step 4 of 4: Ready to Run | 34 |
| Example 2: Merge to History | 44 |
| Example 3: Merging Attachments, Shortcuts, and URL Links into History Tab or Documents Tab | 53 |
| Example 4: Group Assignment Merge | 63 |
| Example 5: Notes Merge | 66 |
| Example 6: Simple Opportunity Merge | 73 |
| Example 7: Opportunity Merge with one Product | 82 |
| Example 8: Merging info into the PRODUCT table | 87 |
| Example 9: Multiple Products to Multiple Opportunities Merges | 90 |
| Example 10: Using an ACCESS database as a Source | 95 |
| Example 11: Act! Activities Merge - Simple | 97 |
| Example 12: Act! Activities Merge - Complex | 100 |
| Example 13: Custom Table Merges | 105 |
| Example 14: Secondary Contact Merges and Exports | 108 |
| Example 15: Act! User Merges | 112 |
| Example 16: Setting the record manager | 116 |
| Example 17: Using the OAKMergeID field for linking History, Notes, etc.. to Contacts | 116 |
| Example 19: Act! to Act! Merges: | 132 |
| Example 20: Transformations and Reserved Key Words | 139 |
| Transformation Definitions | 140 |
| Full List | 141 |
| Upper Case | 141 |
| Lower Case | 142 |
| Proper Case | 142 |
| Trim | 142 |
| Transform RTF to plain text | 142 |
| Transform HTML to plain text | 143 |
| Transform Both HTML and RTF Input to plain text | 143 |
| Merge Multi-line text into a single line | 144 |
| Truncate Multi-line text to the first line | 144 |
| Two ways to avoid blank fields in Act! if the source data is blank: | 145 |
| Key words are available for special situations to change the target field. | 146 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| | |
|--|------------|
| \$BLANK\$ | 147 |
| ALL KEYWORDS: | 149 |
| Example 21: Adding Divisions to Companies | 150 |
| Example 22: Adding Sub Groups: to Groups | 154 |
| Example 23: Exporting all data from tables | 157 |
| Example 24: Filtered Export will Export data for only selected Contacts | 165 |
| Example 25: Filtered Import will Import data matching from a group of Contacts | 169 |
| Example 26: Import and Export Data in XML Format | 170 |
| Example 27: Delete History or Notes | 174 |
| Section 5: Support Policy | 184 |
| Email your Technical Support Requests to: support@oakmerge.com | 184 |
| Section 6: Appendices | 185 |
| Appendix 1: Filters for Mapping view | 185 |
| Appendix 2: Contact Name update rules: Pre fix, Suffix | 187 |
| Appendix 3: Source and Destination path options: UNC and URL locations | 190 |
| Appendix 4: Log Files | 191 |
| Appendix 5: Valid Data and Formatting for various Data Types | 195 |
| OAK!Merge can successfully process data which is in ASCII or UTF-8 format. | |
| Characters, Initial-Caps, Lowercase, Uppercase, Address, and email: | 196 |
| Currency and Numbers: | 197 |
| Memo: | 197 |
| Date: | 197 |
| Date /Time: | 197 |
| Decimal: | 197 |
| Phone | 197 |
| Time: | 197 |
| URL: | 198 |
| OAK!Merge does not currently update these data types in Act! | 198 |
| • Calculated Field | 198 |
| • Annual Event | 198 |
| • Picture (you cannot update or blank them) | 198 |
| • Public / Limited Access lists | 198 |
| Appendix 6: Updating Fields with pull down menus | 198 |
| Appendix 7: Updating Microsoft Office System Drivers to support Access source files. | 200 |
| Appendix 8: Application Story: Create Contacts from Companies and retain Company notes; all done in the same Act! database. | 202 |
| Appendix 9: Application Story: Moving History, Notes, and/or Activities from one Act! Database to another | 203 |
| Appendix 10: Out of Memory Error | 207 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| | |
|---|------------|
| Appendix 11: Updates and Upgrades | 209 |
| Appendix 12: Features Roadmap | 212 |
| Appendix 13: Errors and Warnings | 212 |
| Appendix 14: Software License, Subscription, Warranty, Terms and Conditions of use | 214 |
| Appendix 15: Salesforce Data Migration Kit / Enterprise Edition | 215 |
| Index | 218 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

User's Guide

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



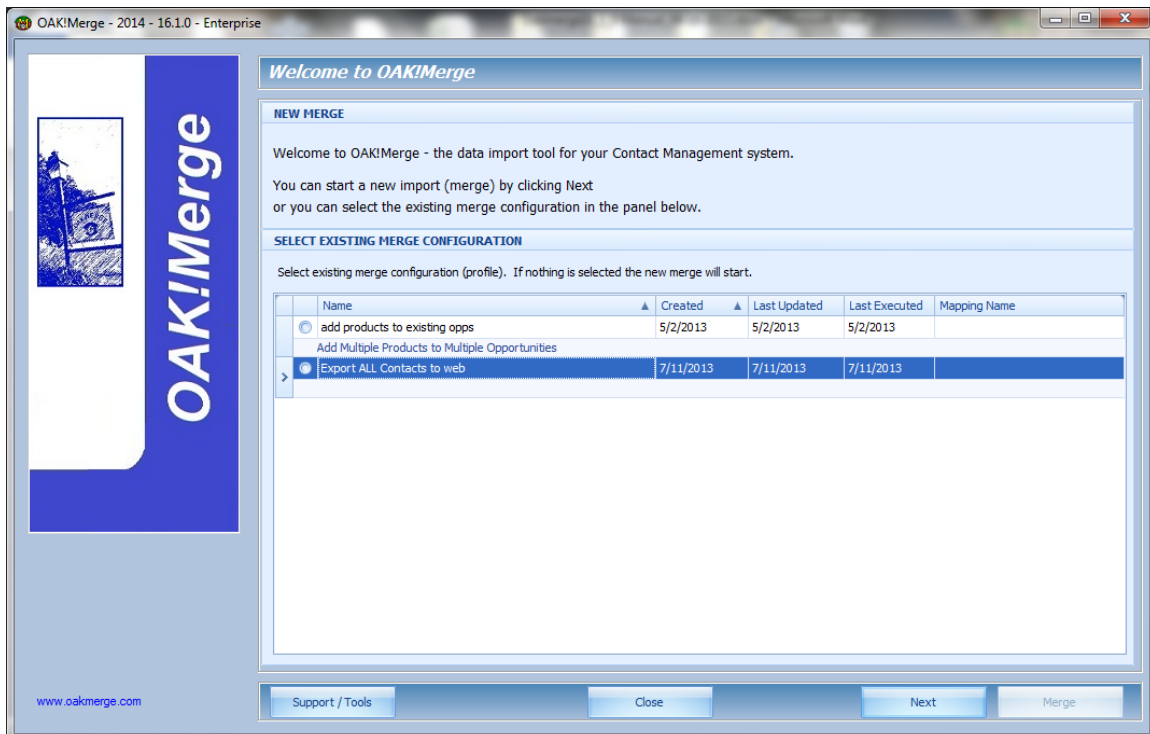
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Merge Rules

Zoho Table: Accounts

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

| 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

Options for Field Update Condition:

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

Buttons: Support / Tools, Close, Back, Next, Finish

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

1. Default is **all fields are updateable** BUT only update the target if 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.)



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



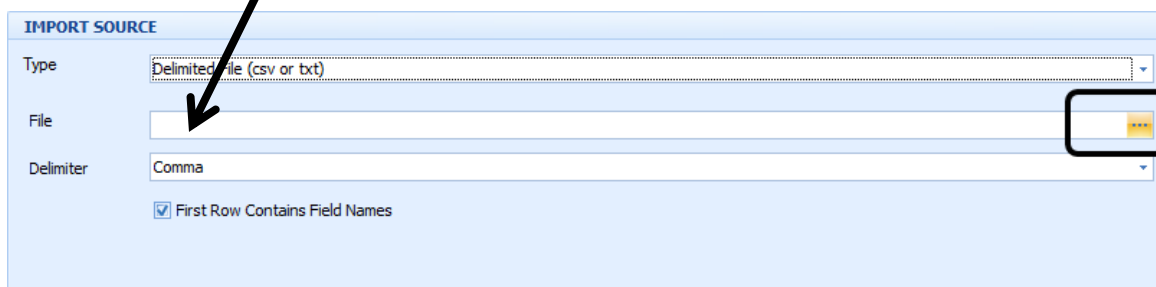
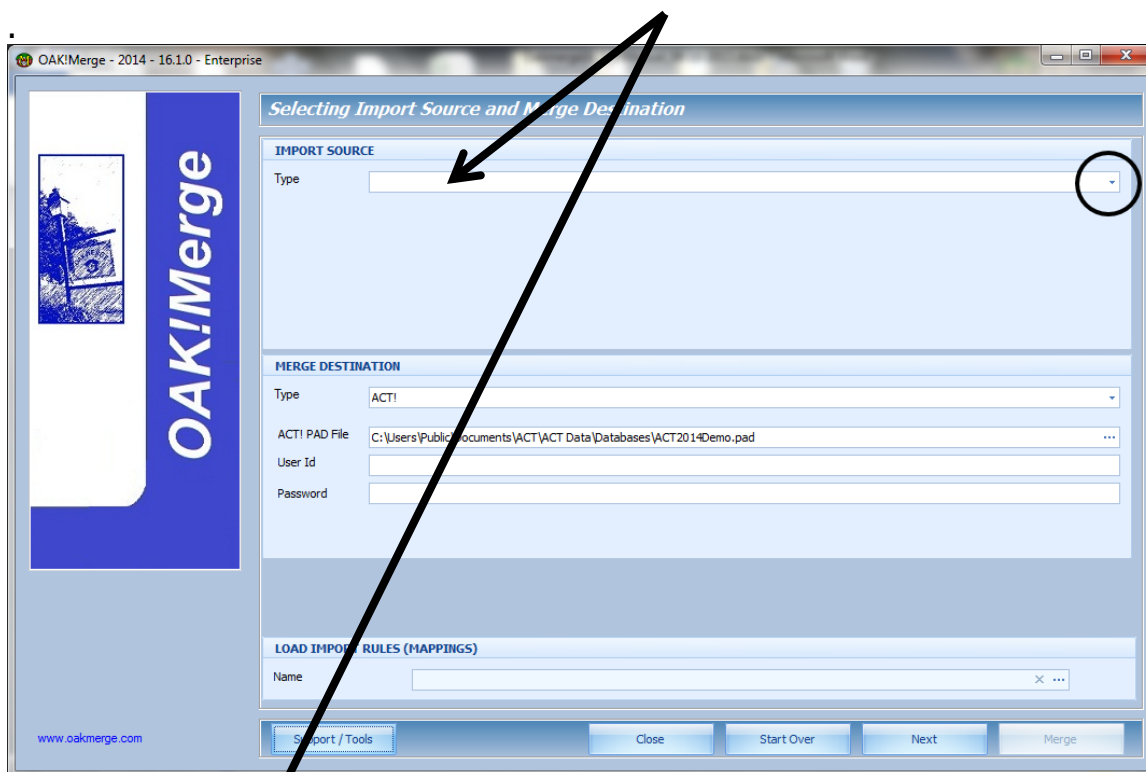
Act! Version 25.1.1 Revised 6/1/23

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





OAK!Merge User's Guide

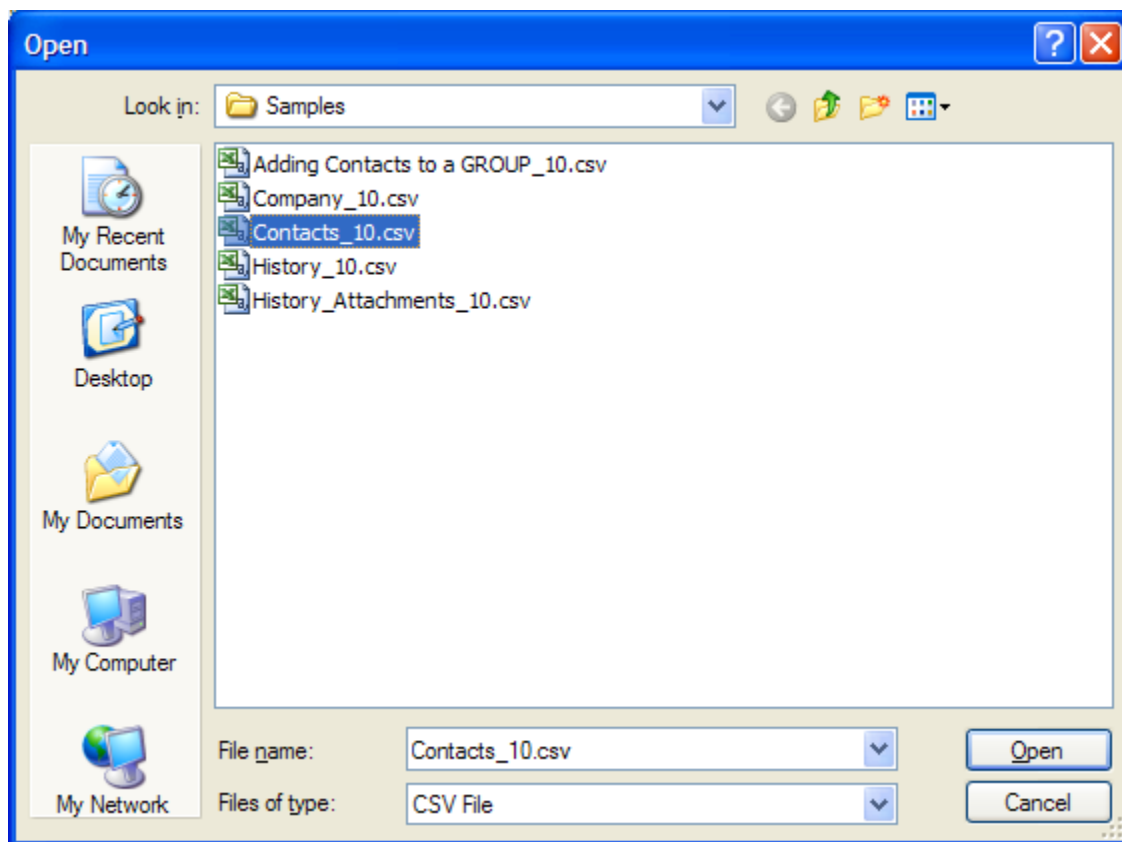


Act! Version 25.1.1 Revised 6/1/23

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





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| 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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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!.

| <i>Selecting Import Source and Merge Destination</i> | |
|--|--|
| 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 | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type: ACT!
ACT! Web API
ACT! Essentials
Delimited File (csv or txt)
MS Excel 2000-2003 (xls)
MS Excel 2007-2016 (xlsx)
MS Access 2000-2003 Database (mdb)

CHANGE MODE: Copy Up Copy Down Swap

MERGE DESTINATION

Type: ACT! Web API

URL: http://vmact17/ACT.Web.API

Database: ACT2015Demo

User: Chris Huffman

Password:

LOAD IMPORT RULES (MAPPINGS)

Name:

Support / Tools Close Start Over Next 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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+



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Selecting Import Source and Merge Destination

IMPORT SOURCE

Type

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

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Merge Rules

ACT! Table ▼

Delimited File (csv or txt) Table

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

Select a Target Table

Unmap All

☐ Display Mapped Only

| Table Type | Required | Transformation Rule |
|---------------|----------|---------------------|
| No image d... | | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

Advanced

Merge Rules

ACT! Table: Groups

Source Table: Groups

ACT! Fields: Groups, Companies, Contacts, History, Notes, Activities, Opportunities

Source Field or Value:

Select a Target Table

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.

Advanced

Merge Rules

ACT! Table: Contacts

Source Table: Contacts

ACT! Fields: Company_10\$, Contacts_10\$, History_10\$

Source Field or Value:



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

| ACT! Fields | Data Type | Matching... | Required | Merge Source | Source Field or Value | Transformation Rule |
|-------------|-----------|-------------|----------|--------------|-----------------------|---------------------|
|-------------|-----------|-------------|----------|--------------|-----------------------|---------------------|

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

The screenshot shows the 'IMPORT SOURCE' dialog box. The 'Type' field is set to 'MS Excel 2000-2003 (xls)'. The 'File' field is empty. A checkbox labeled 'First Row Contains Field Names' is checked and highlighted with a rounded rectangle.

The screenshot shows the 'IMPORT SOURCE' dialog box. The 'Type' field is set to 'Delimited File (csv or txt)'. The 'File' field is empty. The 'Delimiter' field is set to 'Comma'. A checkbox labeled 'First Row Contains Field Names' is checked and highlighted with a rounded rectangle.

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| <i>Selecting Import Source and Merge Destination</i> | |
|--|---|
| 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| 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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 Source | Source Field or Value | Matching Fields | ACT! Fields | Data ... | Required |
|---------------------|-----------------------|-----------------|--------------------------------------|----------|----------|
| Source Table Column | | | User 3 | String | |
| 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 | Company | | Link To: Companies by Company Name | String | |
| Source Table Column | | | Link To: Companies by ACT! GUID | String | |
| Source Table Column | end | | 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 | |

EXECUTE OPTIONS

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

LINKING OPTIONS



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

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.



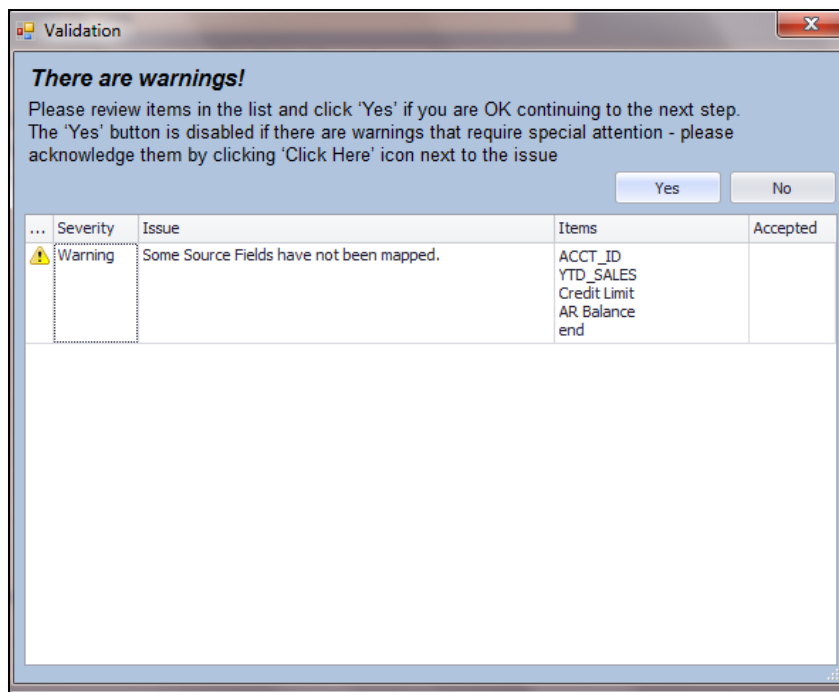
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| Merge Source | Source Field or Value | Matching Fields | ACT! Fields | Data ... |
|---------------------|-----------------------|--------------------------|--------------------------------------|----------|
| 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 | ▼ × | | 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. "





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:

Welcome to OAK!Merge

NEW MERGE

Welcome to OAK!Merge - the data import tool for your Contact Management system.

You can start a new import (merge) by clicking Next
or you can select the existing merge configuration in the panel below.

SELECT EXISTING MERGE CONFIGURATION

Select existing merge configuration (profile). If nothing is selected the new merge will start.

| | Name | Last Executed | Last Updated | Created | Mapping Name |
|----------------------------------|---|---------------|--------------|------------|--------------|
| <input checked="" type="radio"/> | Add Conctcs from Accountin... | | 10/9/2009 | 10/9/2009 | |
| <input type="radio"/> | Add Conctcs from MAS | 10/10/2009 | 10/9/2009 | 10/9/2009 | |
| | Add Conctcs from Accounting System | | | | |
| <input type="radio"/> | Batch44 | 10/15/2009 | 10/15/2009 | 10/15/2009 | |
| | Test for unattended merge using scheduler | | | | |
| <input type="radio"/> | Group_import | 12/16/2009 | 12/16/2009 | 12/16/2009 | |



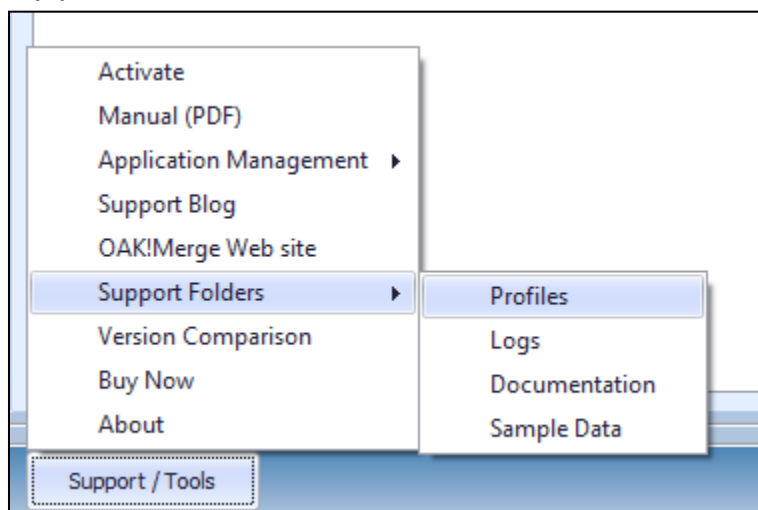
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

The screenshot shows the OAK!Merge application window. The 'EXECUTION OPTIONS' section has three radio buttons: 'Validate only', 'Test Run: limited to' (with a value of 100 and 'rows' next to it), and 'Complete Run' (which is selected). The 'MAPPING INFORMATION' section has a 'Name' field and a 'Save' button. The 'PROFILE INFORMATION' section has a 'Name' field, a 'Description' field, and a 'Save' button. The 'MERGE CONFIGURATION' section has two main areas: 'Delimited File' and 'ACT!'. The 'Delimited File' area shows 'file_name: C:\E Tech Systems\ACT\OAK\Merge 13\Samples\Contacts_10.csv', 'first_row_as_header: True', and 'delimiter: Comma'. The 'ACT!' area shows 'database: C:\Users\Alan\Documents\ACT\ACT Data\Databases\ACT2011\Demo.PAD', 'user: Chris Huffman', and 'pwd:'. Below these are two tables: 'ACT! Contacts' and 'CSV Table'. The 'ACT! Contacts' table has 'Merge Options' with 'Match Found: Update', 'Match Not Found: Add', and 'Matching Fields: Contact'. The 'CSV Table' table is empty. At the bottom, there are buttons for 'Support / Tools', 'Close', 'Back', 'Stop Over', and 'Run'. The 'Run' button is circled.

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.

The screenshot shows the 'Ready to Run' dialog box. The 'EXECUTION OPTIONS' section has three radio buttons: 'Validate / Preview' (which is selected and highlighted in yellow), 'Test Run: limited to' (with a value of 3 and 'rows' next to it), and 'Complete Run'.

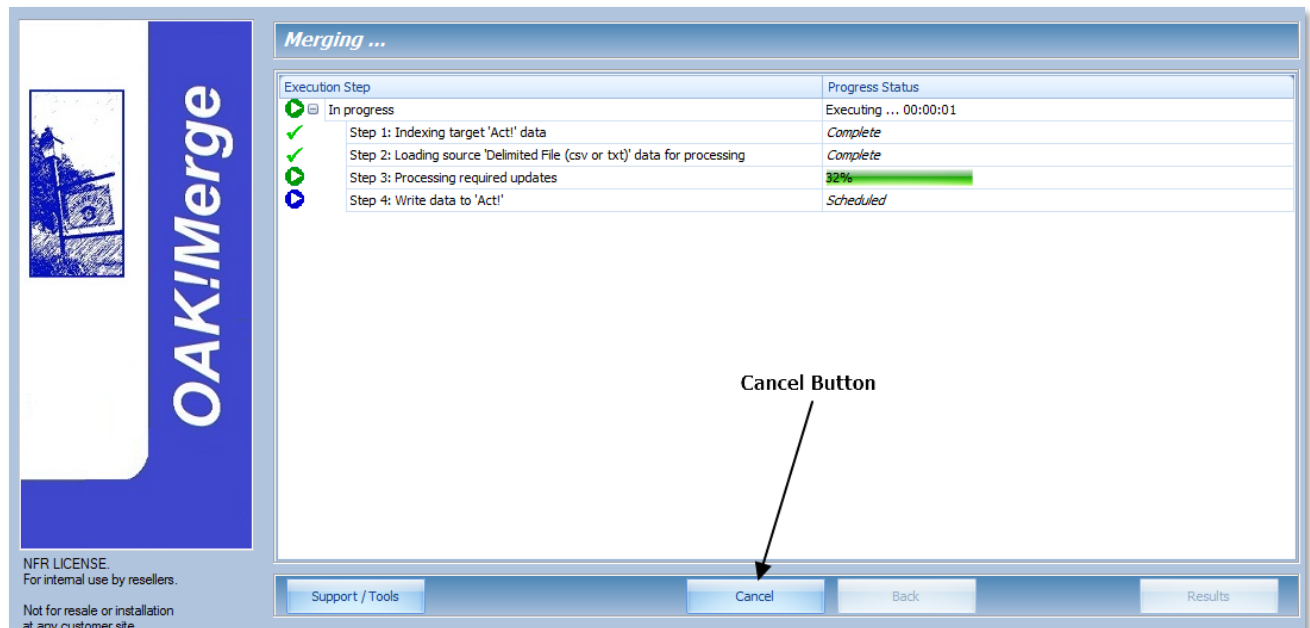


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

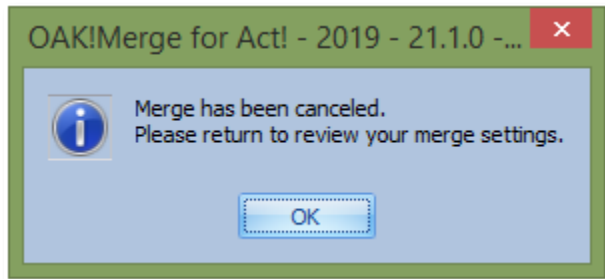




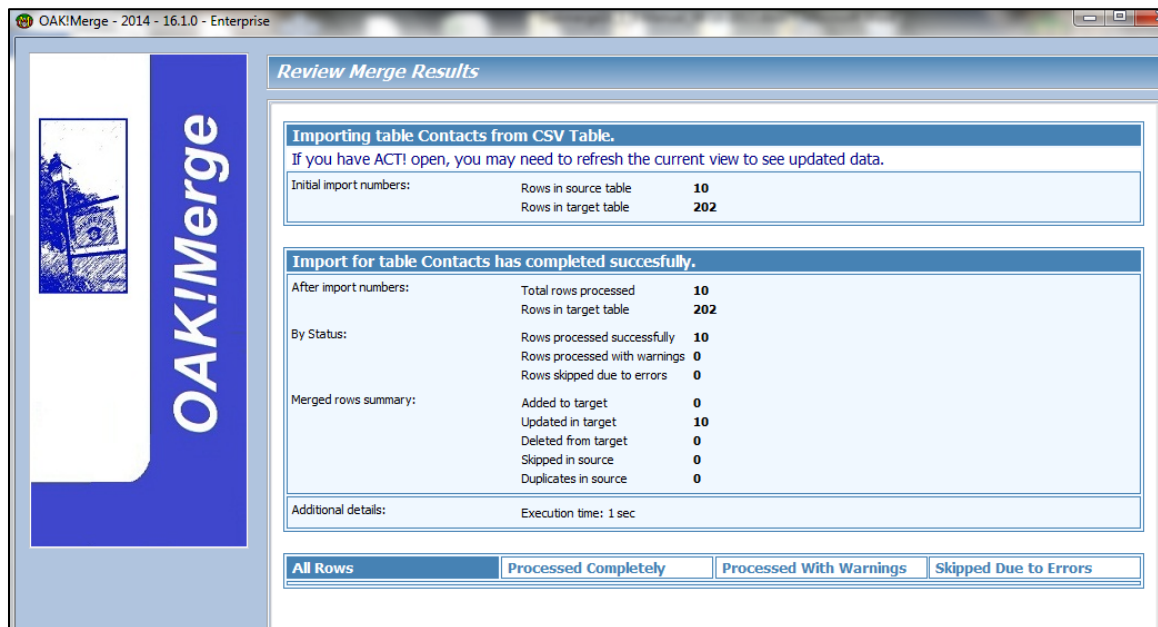
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23



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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Ready to Run

EXECUTION OPTIONS

☐ Validate / Preview
☐ Test Run: limited to rows
☒ Complete Run

Number of rows to skip:

MAPPING (Contains Field Mapping and Merge Rules)

Name:
Description:

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

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.

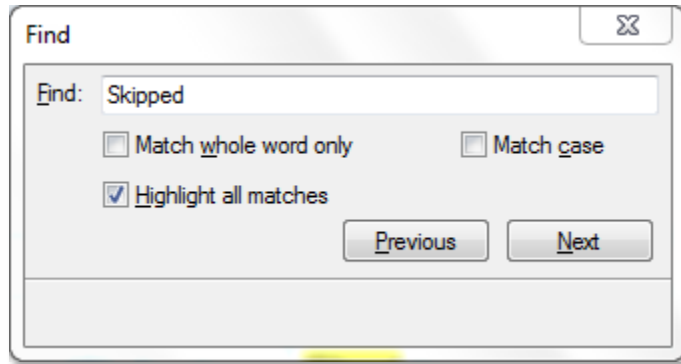


OAK!Merge User's Guide

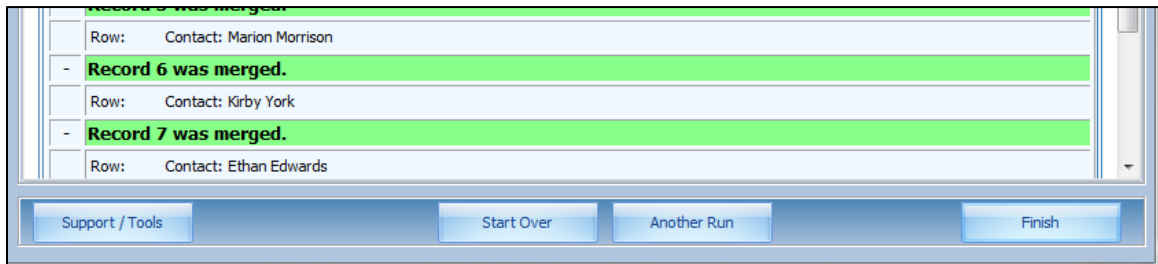


Act! Version 25.1.1 Revised 6/1/23

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.

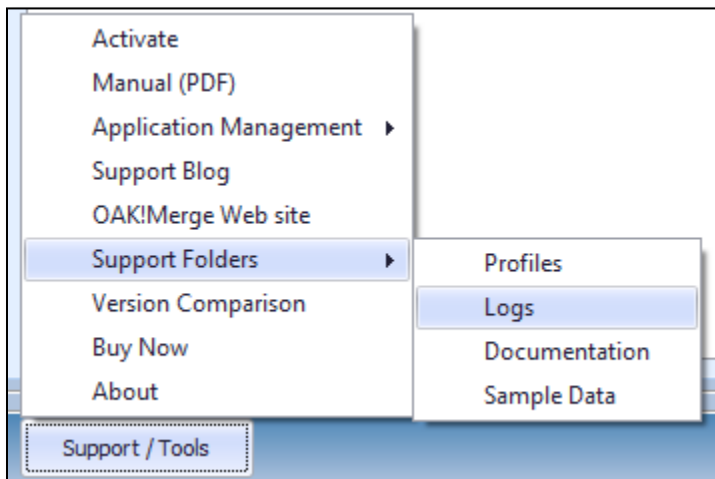


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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. | ##### |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| | Level | LevelNumeric | 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**



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

New History

Type: Call

Contact: Huffman, Chris [CH TechONE]

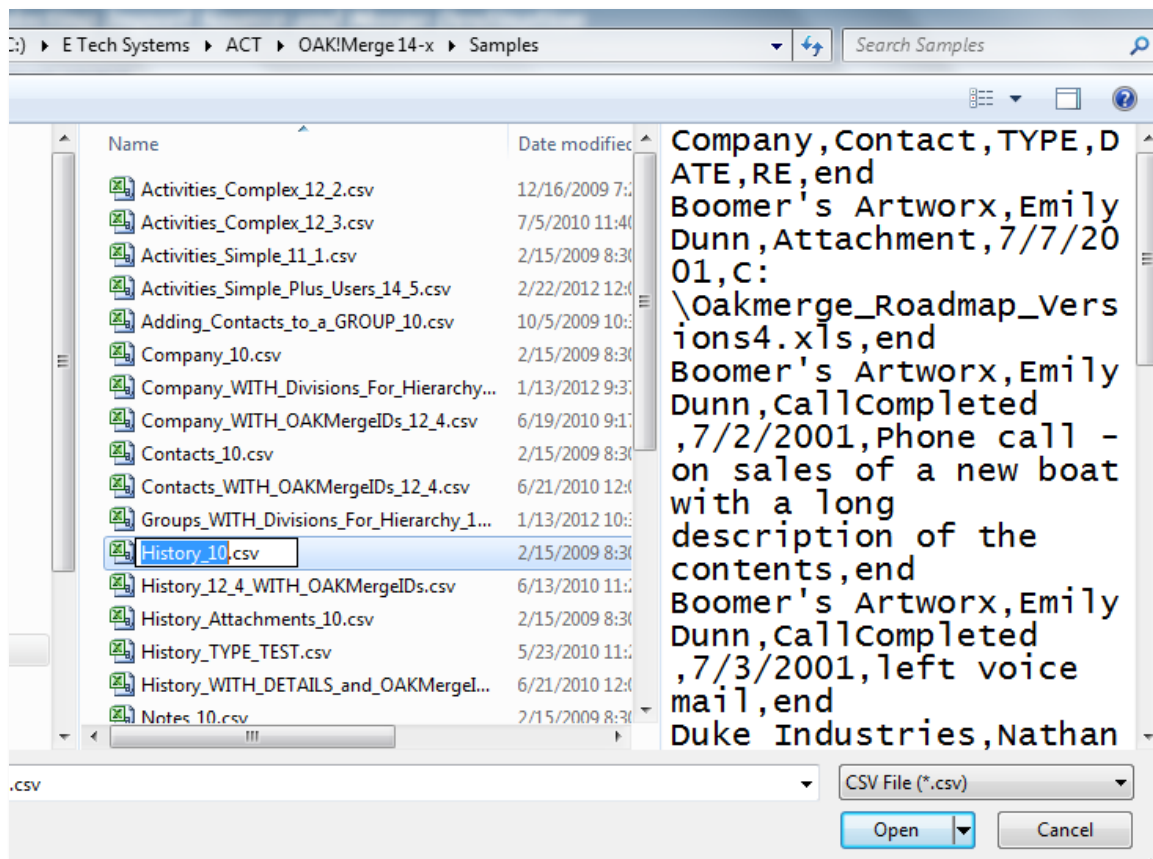
Date: 6/7/2015 Time: 3:45 PM

Attachment:

Result: Call Completed
Call Attempted
Call Completed
Call Left Message
Call Received

Contact...

Attach





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:

Merge Source:

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Act!

| 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 Source | Source Field or Value | ACT! Fields | Data Type | Required | Transformation Rule |
|-----------------------|-----------------------|--|-----------|----------|---------------------|
| > Source Table Column | | Link To: Opportunities by Opportunity Name | 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 |
| Source Table Column | | Record Manager (Name, Login or GUID) | String | | No Transformation |
| Source Table Column | TYPE | History Type | String | ! | No Transformation |
| Source Table Column | RE | Regarding | String | ! | No Transformation |
| Source Table Column | | Details | String | | No Transformation |
| Source Table Column | DATE | Start Time | DateTime | ! | No Transformation |
| Source Table Column | | End Time | DateTime | | No Transformation |
| Source Table Column | | Attachment Description | String | | No Transformation |
| Source Table Column | | Attachment File Name | String | | No Transformation |
| Source Table Column | | Record ID (ACT! GUID) | String | | No Transformation |

EXECUTE OPTIONS

If a Match is Found: Add

If a Match is NOT Found: Add



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

Ready to Run

EXECUTION OPTIONS

☐ Trial
☒ Test Number of records: 10
☐ Complete Run

Execution Logging Level: Full Logging

MAPPING INFORMATION

Name: Save

PROFILE INFORMATION

Name: Save

Description:

MERGE CONFIGURATION

| ACT! | | Delimited File | |
|-----------|--|----------------------|---|
| database: | C:\Documents and Settings\Alan\My Documents\ACT\ACT for Windows 10 Databases\ACT10Demo.PAD | file_name: | E:\DATA Backup_Yes\Oakhurst\OAKMerge10\Samples\History_10.csv |
| user: | | first_row_as_header: | True |
| pwd: | | delimiter: | Comma |

| History | | CSV Table | |
|--------------|---------------------|-----------|-------------------|
| History Type | Source Table Column | TYPE | No Transformation |
| Regarding | Source Table Column | RE | No Transformation |
| Contact | Source Table Column | Contact | No Transformation |
| Company | Source Table Column | Company | No Transformation |
| Start Time | Source Table Column | DATE | No Transformation |

Tools Close Back Start Over Run

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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**



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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].)



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 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 |

Transformation Rule dropdown menu:

- 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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Another example.

| Merge Source | Source Field... | ACT! Fields | Data Type | Required | 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 Name | 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 |
| Source Table Column | | Record Manager (Name, Login or GUID) | String | | No Transformation |
| Source Table Column | TYPE | History Type | String | | No Transformation |
| Source Table Column | RE | Regarding | String | | No Transformation |
| Source Table Column | | Details | String | | No Transformation |

EXECUTE OPTIONS

If a Match is Found: Add

If a Match is NOT Found: Add

Transformation Rule dropdown options:

- 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

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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: Other Result: Attachment

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

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

Attach: File... Shortcut...

Name: Alan Lee

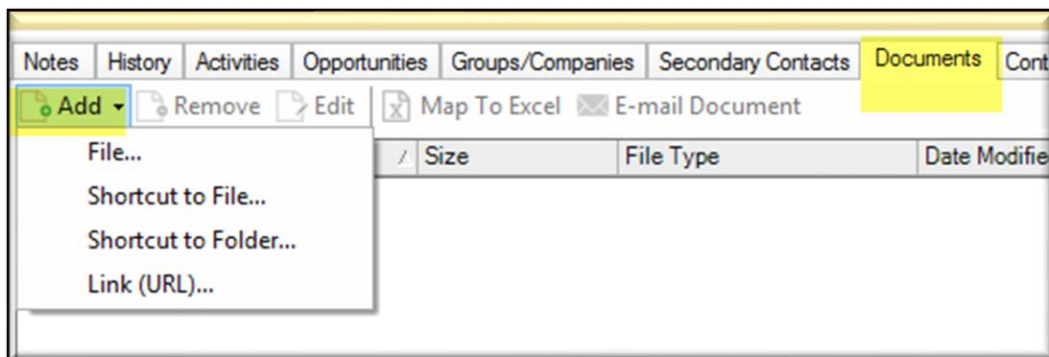


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

TypeDelimited File (csv or txt)

FileC:\E Tech Systems\ACT\Oak!Merge 15\Samples\History_Attachments_10.csv

DelimiterComma

☒ First Row Contains Field Names

MERGE DESTINATION

TypeACT!

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

User Id

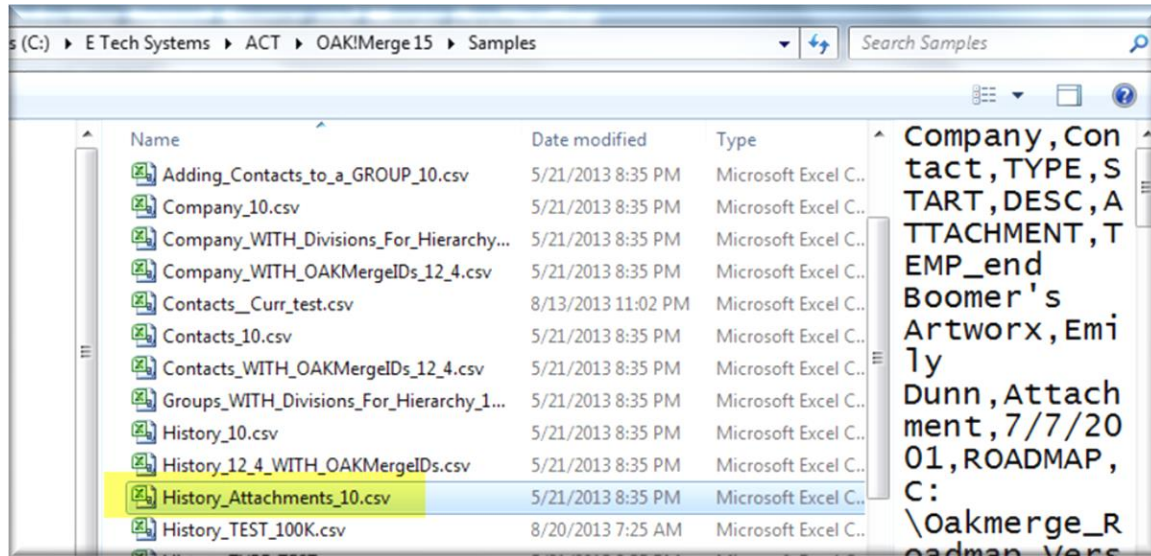
Password



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23



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

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Merge Rules

ACT! Table

History

Delimited File (csv or txt) Table

CSV Table

Unmap All

☒ Display Mapped C

| | 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 Transf |
| | Source Table Column | TYPE | History Type | String | | No Transf |
| | Constant Value | Attachment | Regarding | String | | No Transf |
| | Source Table Column | START | Start Time | DateTime | | No Transf |
| | Source Table Column | DESC | Attachment Description | String | | No Transf |
| | Source Table Column | ATTACHMENT | Attachment File Name | String | | No Transf |

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."



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Ready to Run Screen

OAK!Merge Wizard - 13.3.2 - Enterprise

Ready to Run

EXECUTION OPTIONS

☐ Validate only
☐ Test Run: limited to 100 rows
☒ Complete Run

Execution Logging Level: Errors and Warnings

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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 succesfully.

| | | |
|-----------------------|------------------------------|----|
| 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.

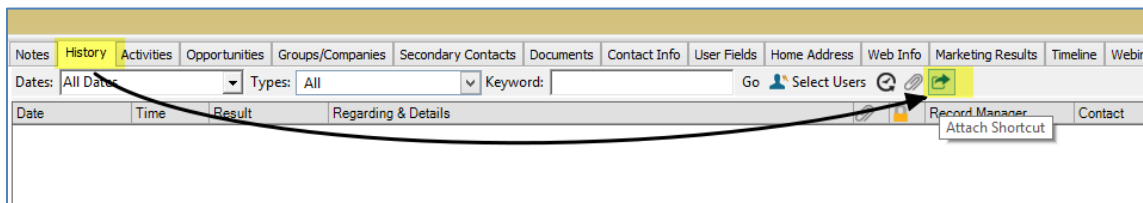


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

| C:\Users\Public\Documents\ACT\ACT Data\Databases\ACT2015Demo-database files\Attachments\act-pro-170-us_ca_la.Ink | | | | | | | | | | |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Q2 | A | B | C | D | E | F | G | H | I | J |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME | RECORD_CONTACT_NAME |
| RECORD_CONTACT_NAME | | | | | | | | | | |

Above expanded:

Attachments\act-pro-170-us_ca_la.Ink

| N | O | P | Q | R | |
|-----------------|-----------------|-----------------------------------|---------------------------|---------------------|------|
| START_TIME | END_TIME | ATTACHMENT_NAME | ATTACHMENT_FILENAME | ATTACHMENT_SHORTCUT | _R |
| 4/14/2016 18:20 | 4/14/2016 18:20 | D:\Media\act-pro-170-us_ca_la.exe | C:\Users\Public\Documents | TRUE | 5865 |
| 4/23/2014 14:06 | 4/23/2014 14:06 | Quote-4232009126-Wilhelm Loke.DC | C:\Users\Public\Documents | FALSE | 6eb |
| 4/14/2016 18:17 | 4/14/2016 18:17 | untitled-1.jpg | C:\Users\Public\Documents | FALSE | f386 |
| 4/14/2016 18:15 | 4/14/2016 18:15 | | | | 66e |
| 4/14/2016 18:15 | 4/14/2016 18:15 | lew@XYZgroup.com-1434559288977. | C:\Users\Public\Documents | TRUE | 12cf |
| 4/14/2016 18:16 | 4/14/2016 18:16 | | | | 744: |
| 4/14/2016 18:14 | 4/14/2016 18:14 | SFDMK_RUNTIME_Image 001.jpg | C:\Users\Public\Documents | FALSE | 3ab |
| 4/27/2014 21:42 | 4/27/2014 21:42 | GoogleTip for Phones.rtf | C:\Users\Public\Documents | FALSE | 326 |

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

In Act! History you see:



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| | | | | | | | | | | | |
|------------------|---------------|--------------------------|---|-----------|------------------|--------------------|-----------------|---|----------|---------------|----------------|
| 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 | | | |
| te | 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.

Edit History

Type: Other Result: Quote

Contact: Loke, Wilhelm [Yellow Jersey Bikes] Contact...

Date: 4/23/2014 Time: 2:06 PM Duration: 0 minutes

Attachment: Quote-4232009126-Wilhelm Loke.DOC Attach

Share With: Yellow Jersey Bikes [CMP]

Record Manager: Chris Huffman

Regarding: Quote # 2009

Details: Microsoft Sans Serif 8 B I U S

The Chart below has the combinations

| | A | B | C | D | E | F | G | H |
|----|-------------------------|-----------------------------------|------------------|-----------|---|---------------|---|---|
| 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 |
| 7 | Nathan Cutting Brittles | Document Tab -Link(URL) | Library Document | 1/6/2018 | URL TEST-Microsoft Word Test 3 Document.docx | | | http://www.oakmerge.com/downloads/Overview_OAKMer |
| 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 | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Merge Rules

Act! Table History

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

| 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 |



OAK!Merge User's Guide



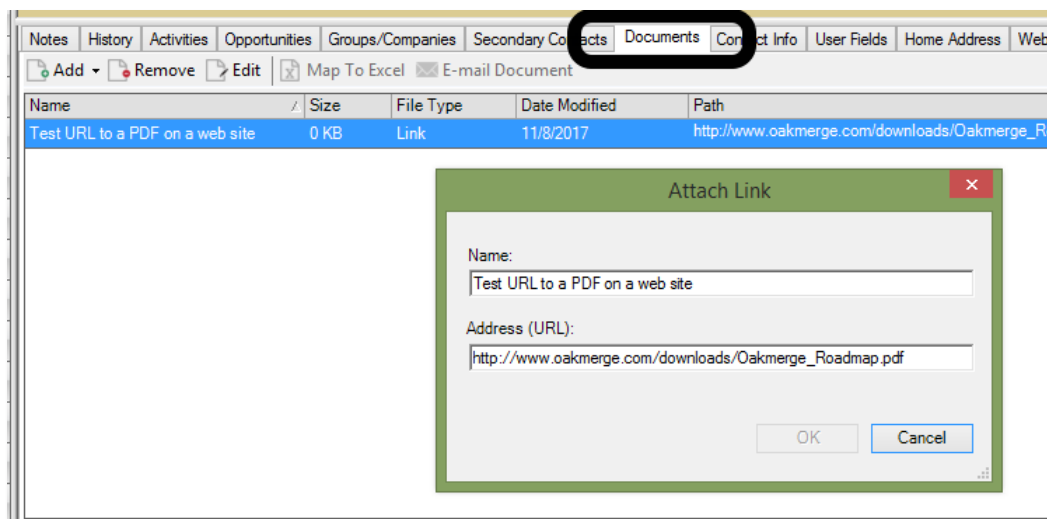
Act! Version 25.1.1 Revised 6/1/23

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_FILENAME | 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.





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Merge Rules

ACT! Table Contacts

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

☒ 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 Update If a Match is NOT Found Skip

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)



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

...



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

Password

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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| | | | | |
|------------|------------|----------|---|----------|
| | | | 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 Execution Logging Level:

☐ Test Run: limited to 100 rows

☒ Complete Run

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 |

Support / Tools Close Back Start Over Run



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

ACT! by Sage Premium - ACT10Demo

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

1 of 1

Back 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: ☐ Customer ID: A_0023
Title: Sales Representative City: Scottsdale First Purchase:
Department: State: AZ Last Years Purchases:
Phone: (602) 555-4874 Ext. ZIP Code: 85258 Trivia:
Mobile: (602) 555-1142 Country: United States Web Site: E-mail:
Fax: (602) 555-8848
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 | TEST BIG NOTE as a TABLE Company Contact |
|----------|----------|---|----------------|-------------|--|
| 7/3/2001 | 12:00 AM | left voice mail | Chris Huffman | Boomer's Ar | GROUP_NAME end |
| 7/3/2001 | 12:00 AM | TEST BIG NOTE as a TABLE Company Contact | Chris Huffman | Boomer's Ar | Boomer's Artworx Emily Dunn TEST1 end |
| | | GROUP_NAME end | | | Boomer's Artworx Bettie James TEST1 end |
| | | Boomer's Artworx Emily Dunn TEST1 end | | | Corleone's Pasta Company Morty Manicotti TEST1 end |
| | | Boomer's Artworx Bettie James TEST1 end | | | Duke Industries Nathan Cutting Brittles TEST1 end |
| | | Corleone's Pasta Company Morty Manicotti TEST1 end | | | Duke Industries Marion Morrison TEST1 end |
| | | TEST1 end | | | Duke Industries Kirby York TEST1 end |
| | | Duke Industries Nathan Cutting Brittles TEST1 end | | | Duke Industries Ethan Edwards TEST1 end |
| | | end | | | Jake Flakes Inc. Bella Minoal TEST1 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 | Mad House;Thekes Ashley Allan TEST2 end |

Layout

Lookup: Last Name

start Desktop 12:08 AM



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Select Opportunity Table

Merge Rules

| | |
|----------------------|--------------------|
| ACT! Table | Opportunities |
| Delimited File Table | |
| | Groups |
| | Companies |
| | Contacts |
| | History |
| | Notes |
| | Activities |
| | Opportunities |
| | Products |
| | Users |
| | Secondary Contacts |

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

Unmap All

☒ 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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:
Full Logging

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: |
| delimiter: Comma | | pwd: |



OAK!Merge User's Guide

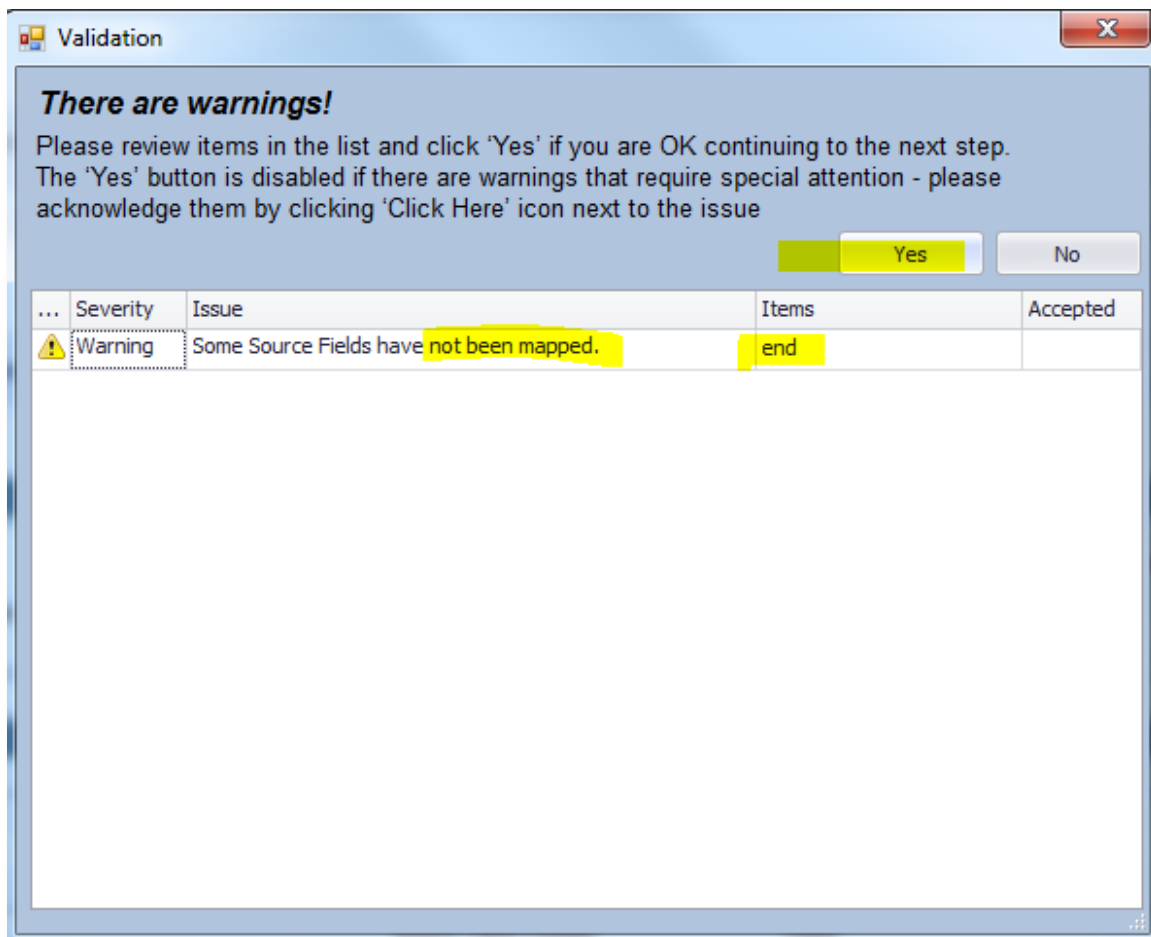


Act! Version 25.1.1 Revised 6/1/23

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











OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| 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 succesfully. | | | | | | | | | | | | | | |
| 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 | | | | | | | | | | | | | |
| <table border="1"><thead><tr><th>All Rows</th><th>Processed Completely</th><th>Processed With Warnings</th></tr></thead><tbody><tr><td>-</td><td colspan="2">Record 1 was added.</td></tr><tr><td>Row:</td><td colspan="2">Opportunity Name: Test_Opp_Name_Simple_101</td></tr><tr><td>-</td><td colspan="2">Record 2 was added.</td></tr></tbody></table> | | | All Rows | Processed Completely | Processed With Warnings | - | Record 1 was added. | | Row: | Opportunity Name: Test_Opp_Name_Simple_101 | | - | Record 2 was added. | |
| All Rows | Processed Completely | Processed With Warnings | | | | | | | | | | | | |
| - | Record 1 was added. | | | | | | | | | | | | | |
| Row: | Opportunity Name: Test_Opp_Name_Simple_101 | | | | | | | | | | | | | |
| - | Record 2 was added. | | | | | | | | | | | | | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

ACT! by Sage Premium - ACT10Demo

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

6 of 184

Back Contact Detail View Groups/Companies...

CH Tech ONE

Company: A1 Services of UK Address: 67a Station Road ID/Status: Prospect

Contact: Angela Ives Referred By:

Salutation: Angela Key Contact: Customer ID:

Title: Music and Lighting Coordinator City: Blackpool First Purchase:

Department: State: Lancashire Last Years Purchases:

Phone: 0174 287623 Ext: ZIP Code: BP12 7HT Trivia:

Mobile: Country: United Kingdom

Fax: 0174 287623 Web Site:

Alt: E-mail:

Last Results:

Last Reach: Last Meeting: Last Letter: Last E-mail: Last Edited by: Ernst Anderson

Last Edited: 5/20/2007

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

Dates: All Dates Status: All Select Users New Opportunity Options

| 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 | |

Layout

Lookup: All Contacts Opportunities: 11 Weighted Total \$3,000.00 Grand Total \$12,000.00

start 2 Windows Explorer ACT! by Sage Premium... Oakmerge10_Manual... Snagit/32 Capture Pr... OAK!Merge Wizard - ... 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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Example 7: Opportunity Merge with one Product

A simple merge with one product per Opportunity:

Source File Example

| | A | B | C | D | E | F | G | H | I | J | K | L |
|----|---------------------|-----------------------|----------|------------------|-----------------------|------------------|---------|----------|---------|------------|------------|-----|
| | Company | Contact | Name | Status | Process | Stage | Product | Quantity | Price | Probabilit | Estimated | end |
| 1 | Yellow Jersey Bikes | Ashley Allar Test_Opp | Open | ACT! Sales Cycle | Initial Communication | ONE Component | | 1 | 0 | 10 | 1/1/2010 | end |
| 2 | Yellow Jersey Bikes | Ashley Allar Test_Opp | Open | ACT! Sales Cycle | Initial Communication | ONE Component | | 2 | 7.88 | 22 | 1/2/2010 | end |
| 3 | Yellow Jersey Bikes | Ashley Allar Test_Opp | Open | ACT! Sales Cycle | Needs Assessment | ONE Component | | 3 | | 25 | 1/3/2010 | end |
| 4 | Yellow Jersey Bikes | Ashley Allar Test_Opp | Open | ACT! Sales Cycle | Presentation | Service Contract | | 4 | 44.44 | 40 | 1/4/2010 | end |
| 5 | Yellow Jersey Bikes | Ashley Allar Test_Opp | Lost | ACT! Sales Cycle | Needs Assessment | Service Contract | | 5 | 750 | 88 | 7/7/1977 | end |
| 6 | Yellow Jersey Bikes | Ashley Allar Test_Opp | Won | ACT! Sales Cycle | Needs Assessment | Service Contract | | 6 | 100 | 100 | 12/12/2000 | end |
| 7 | Yellow Jersey Bikes | Ashley Allar Test_Opp | Closed-W | ACT! Sales Cycle | Sales Fulfillment | Service Contract | | 7 | 1000 | 100 | 12/13/2000 | end |
| 8 | Yellow Jersey Bikes | Ashley Allar Test_Opp | Inactive | ACT! Sales Cycle | Negotiation | TechONE System | | 8 | 10000 | 0 | 12/14/2000 | end |
| 9 | Yellow Jersey Bikes | Ashley Allar Test_Opp | Inactive | ACT! Sales Cycle | Initial Communication | TechONE System | | 9 | 5678.99 | | 12/15/2000 | end |
| 10 | 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 | Sales Fulfillment | Service Contract |
| Yellow Jersey Bikes | Ashley Allan | Test_Opp_Name_c108 | Inactive | Act! Sales Cycle | Negotiation | TechONE System |
| Yellow Jersey Bikes | Ashley Allan | Test_Opp_Name_c109 | Inactive | Act! Sales Cycle | Initial Communication | TechONE System |
| Yellow Jersey Bikes | Ashley Allan | Test_Opp_Name_c110 | Inactive | Act! Sales Cycle | Negotiation | TechONE System |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| <i>Selecting Import Source and Merge Destination</i> | |
|--|---|
| 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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

Merge Rules

ACT! Table Opportunities

Delimited File (csv or txt) Table CSV Table

Unmap All

☒ 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 | | No Transformatio |
| | Source Table Column | Status | <input type="checkbox"/> | Status | String | | No Transformatio |
| | Source Table Column | Process | <input type="checkbox"/> | Process | String | | No Transformatio |
| | Source Table Column | Stage | <input type="checkbox"/> | Stage | String | | No Transformatio |
| | Source Table Column | Probability of Close | <input type="checkbox"/> | Probability of Close | Int32 | | No Transformatio |
| | Source Table Column | Estimated Close Date | <input type="checkbox"/> | Estimated Close Date | DateTime | | No Transformatio |
| > | Source Table Column | Contact | <input checked="" type="checkbox"/> | Link To: Contacts by Full Conta... | String | | No Transformatio |
| | Source Table Column | Product | <input type="checkbox"/> | Opportunity Product | String | | No Transformatio |
| | Source Table Column | Price | <input type="checkbox"/> | Opportunity Product Price | Decimal | | No Transformatio |
| | Source Table Column | Quantity | <input type="checkbox"/> | Opportunity Product Quantity | Decimal | | 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 Opportunaties from CSV Table.

| | | |
|-------------------------|----------------------|-----|
| Initial import numbers: | Rows in source table | 10 |
| | Rows in target table | 297 |

Import for table Opportunaties 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 |

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

Tools | Start Over | Another Run | Finish



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| 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 | |

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:

| Name | Item Number | Cost | Price |
|-----------------------|-------------|------------|-------------|
| Mini Core Replacement | CCE | \$50.00 | \$100.00 |
| ONE Component | ONE | \$1,000.00 | \$2,500.00 |
| Service Contract | SC | \$750.00 | \$2,000.00 |
| TechONE System | T1SYS | \$5,000.00 | \$12,000.00 |
| TWO Component | TWO | \$1,750.00 | \$4,000.00 |

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Define Fields

Back Forward Home

Field Tasks

- Create new field
- Edit field
- Delete field
- Field Security

List Tasks

- Manage drop-down lists
- Manage product list
- Manage process list

Create, edit or delete fields

Create a new field, or select a field from the list to edit or delete. See the Field Tasks menu to the left.

View fields for:

Products

| 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.

Merge Rules

ACT! Table: Products

Delimited File Table: CSV Table

| | ACT! Fields | Data Type | Matching Fields | Required | Merge Source | Source Table Column |
|---|-------------|-----------|--------------------------|----------|---------------------|---------------------|
| 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 | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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: Groups

Delimited File (csv or txt) Table: Products for Opportunities

ACT! Fields:



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 | Require |
|---------------------|--------------------------|--|-----------|---------|
| 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

act!

Back Forward New Call Meeting To-Do Note History E-mail Help Topics Search Go

Opportunities

Lookup

Opportunity Field:
Opportunity Name
Contains:
Go

More Options...

CH TechONE

Opportunity Name: Test_Opp_Name_c101

Status: Open
Closed - Won
Closed - Lost
Inactive

Process/Stage:
Process: CHT1 Sales
Stage: Initial Communication

Reason: Probability: 10

Est Close Date: 1/1/2010 Actual Close Date: Open Date: 8/25/2013 Days Open: 2

Associations:
Contacts: Ashley Allan
Groups: Companies

Total: \$69,260.00
Weighted: \$6,926.00
Gross Margin: \$52,510.00

Contacts Groups/Companies Products/Services Notes Activities History Documents Strategy Opportunity Info User Fields

Add... Delete

| Name | Item # | Quantity | Cost | Price | Adjusted Price | Discount | Subtotal | Test 2 | TEST 1 | Options |
|------------------|--------|----------|------------|-------------|----------------|---------------|-------------|----------|--------|---------------------|
| 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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Fields available for mapping include any custom product fields.

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



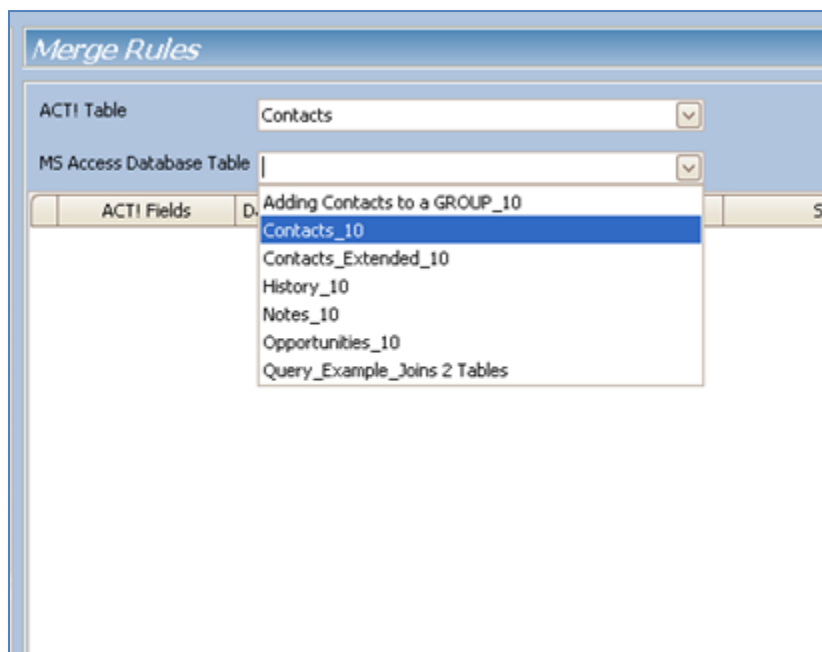
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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
Delimited File (csv or txt)

File
C:\E Tech Systems\ACT\OAK!Merge 15\Samples\Activities_Simple_11_1.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

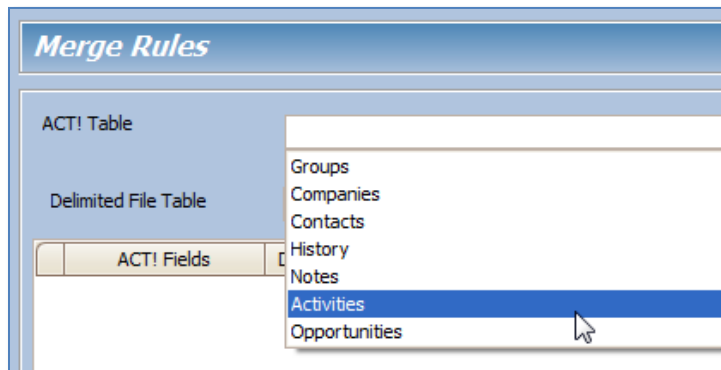
Password



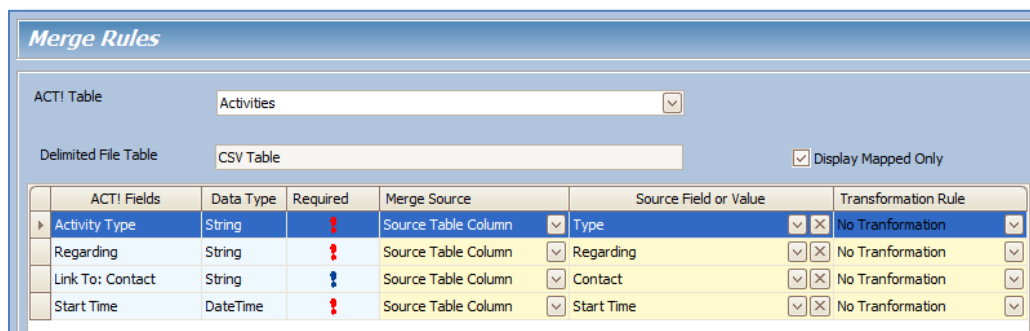
OAK!Merge User's Guide



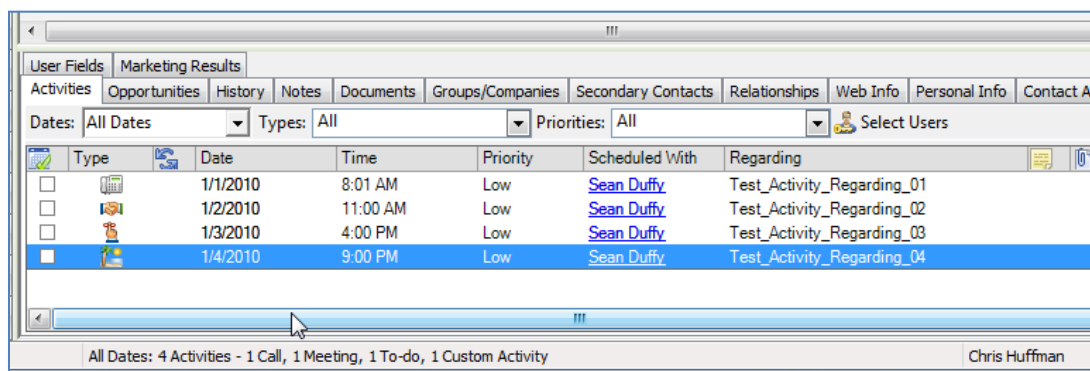
Act! Version 25.1.1 Revised 6/1/23



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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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: Delimited File

File: C:\E Tech Systems\ACT\OAK!Merge 12\Samples\Activities_Complex_12_2.csv

Delimiter: Comma

☒ First Row Contains Field Names

MAP as shown

Merge Rules

ACT! Table

Activities

Delimited File (csv or txt) Table

CSV Table

Unmap All

☒ 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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

Options

General Details Recurrence Availability

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Then map the new column to the record manager

| 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 |
|------|----------|----------|----------|----------------|----------------------------|-----------------|
| | 1/1/2010 | 8:01 AM | Low | Sean Duffy | Test_Activity_Regarding_01 | Fred Fenderline |
| | 1/2/2010 | 11:00 AM | Low | Sean Duffy | Test_Activity_Regarding_02 | Ernst Anderson |
| | 1/3/2010 | 4:00 PM | Low | Sean Duffy | Test_Activity_Regarding_03 | Fred Fenderline |
| | 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 |
|----|---------------------|----------------|----|----|----------------------|----|----|----|----|----|----|----|------------------|------------------|--------------|------------------|------------------|----------|
| 1 | RECORD_CONTACT_NAME | RI | RI | RI | RI | RI | RI | RI | RI | RI | RI | RI | START_TIME | END_TIME | RECUR_PERIOD | RECUR_START_TIME | RECUR_END_TIME | EXTERNAL |
| 2 | 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: (\rft1\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 | Ci | European (\rft1\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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

the next occurrence is listed as a separate row.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | | | | | | |
|---|----------|----------|-----------------|----|---------|----|----|----|----|----|----------------|-----------|------------------|------------------|---------|-------|------------------|------------------|-------|-------|-------|-----|----------|-------|----|---------|--------|
| 1 | RECORD | CONTACT | NAME | RE | RE | RE | RE | RE | RE | RE | ACTIVITY | REGARDING | DETAILS | START | END | RECUR | PER | RECUR | START | END | RECUR | END | EXTERNAL | SALAR | IS | CLEARED | ISCOMP |
| 2 | Melissa | Pearce | fd540a2d-a131-4 | CI | To-do | | | | | | Qtly Meeting | | 10/18/2017 9:00 | 10/18/2017 9:05 | Monthly | | 10/18/2017 9:00 | 10/18/2017 9:05 | FALSE | TRUE | | | | | | | |
| 3 | Melissa | Pearce | fd540a2d-a131-4 | CI | To-do | | | | | | Qtly Meeting | | 1/17/2018 9:00 | 1/17/2018 9:05 | Monthly | | 10/18/2017 9:00 | 10/18/2017 9:05 | FALSE | FALSE | | | | | | | |
| 4 | Juliette | Rousseux | 6ad0e080-b19b-4 | CI | Meeting | | | | | | Birthday Lunch | | 10/16/2012 11:30 | 10/16/2012 13:00 | Yearly | | 10/16/2012 11:30 | 10/16/2012 13:00 | FALSE | TRUE | | | | | | | |

Reminder: Activities cannot be set to reoccur in Act! using OAK!Merge to import them.

Example 13: Custom Table Merges

You can append or update records to Act! custom tables in Act! 12 or later just like Contacts or Companies. You pick what fields to match on; then select the execute options: What to do if the matches and what to do if it does not match.

All the custom tables in a database will be available as targets in the merges. The word custom appears in front of the table name.

You Link the custom table rows to Contacts, Companies, Groups, or opportunities using the "Link To:" Fields.

| ACT! Fields | Data Type | Matching ... | Required |
|-------------------------------|-----------|--------------------------|-------------------------------------|
| BillingContactName | String | <input type="checkbox"/> | <input type="checkbox"/> |
| Private | Boolean | <input type="checkbox"/> | <input type="checkbox"/> |
| BillingContactEmail | String | <input type="checkbox"/> | <input type="checkbox"/> |
| IDBillingContact | String | <input type="checkbox"/> | <input type="checkbox"/> |
| BillingContactCompany | String | <input type="checkbox"/> | <input type="checkbox"/> |
| Link To: Contact by Full Name | String | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Link To: Company by Name | String | <input type="checkbox"/> | <input type="checkbox"/> |
| Link To: Opportunity by Name | String | <input type="checkbox"/> | <input type="checkbox"/> |
| Link To: Group | String | <input type="checkbox"/> | <input type="checkbox"/> |
| Record Manager | String | <input type="checkbox"/> | <input type="checkbox"/> |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 at 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_WarrantyPrice | RECORD_CONTACT_NAME | RECORD_CONTACT_GUID | RECORD_COMPANY_NAME | RECORD_COMPANY_GUID | RECORD_OPPTUNITY_NAME | RECORD_OPPTUNITY_GUID | RECORD_GROUP | RECORD_GROUP_GUID | RECORD_USER | RECORD_ID |
| 00 Router | 0 | | Ace Pet Store Franchises | ad233459-8cb1-4889-a924-bfb1b06a2f89 | | | | | | | Chris Huffman | b9a483ee-8a61-4b2d-bbce-8cd |
| 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_OPPTUNITY_NAME | | | | |
| 18 | RECORD_OPPTUNITY_GUID | | | | |
| 19 | RECORD_GROUP | | | | |
| 20 | RECORD_GROUP_GUID | | | | |
| 21 | RECORD_USER | Chris Huffman | | Chris Huffman | |
| 22 | _RECORD_ID__ | b9a483ee-8a61-4b2d-bbce-8cd | 3025001 | a4a6b5fb-134c-435e-89f0-926 | a92109a37 |
| 23 | | | | | |
| 24 | | | | | |
| 25 | | | | | |

sample record 1 is
linked to only a company

sample record 2 is
linked to only a Contact

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

The screenshot shows the ACT! Premium software interface. The top menu bar includes File, Edit, View, Lookup, Contacts, Schedule, Write, Reports, Tools, and Help. The left sidebar contains a 'Contacts' section with a 'Lookup' dropdown and a 'Related Tasks' list. The main window displays a 'Business Card' for Emily Dunn, a Sales Representative at Boomer's Artworx. The contact information includes a phone number (602) 555-4874, a fax number (602) 555-8848, and an address (8907 E. Rosebud Lane, Suite 25, Scottsdale, AZ 85258, United States). The bottom navigation bar shows several tabs, with 'Secondary Contacts' circled in black.

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| | 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 Merts | 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Merge Rules

ACT! Table: [Secondary Contacts]

Source Table: [Secondary Contacts]

ACT! Fields: [Secondary Contacts]

Field or Value: [Secondary Contacts]

Transformation: [Secondary Contacts]

Display Mapped Only: ☐

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

Merge Rules

ACT! Table: Secondary Contacts

Delimited File (csv or txt) Table: CSV Table

Unmap All

☒ Display Mapped Only

| Merge Source | Source Field or Value | ACT! Fields | Data Type | Required | Transformation Rule |
|---------------------|-----------------------|--|-----------|----------|---------------------|
| Source Table Column | Primary_Contact | Link To: Contacts by Full Contact Name | String | | No Transformation |
| Source Table Column | Contact | Contact | String | | No Transformation |
| Source Table Column | Company | Company | String | | No Transformation |
| Source Table Column | Title | Title | String | | No Transformation |
| Source Table Column | Phone | Phone | String | | No Transformation |
| Source Table Column | Contact | Web site | String | | No Transformation |
| Source Table Column | Address Line 1 | Address Line 1 | String | | No Transformation |
| Source Table Column | Address Line 2 | Address Line 2 | String | | No Transformation |
| Source Table Column | City | City | String | | No Transformation |
| Source Table Column | State | State | String | | No Transformation |
| Source Table Column | ZIP | Zip | String | | No Transformation |

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Ready to Run

EXECUTION OPTIONS

☐ Validate

☐ Test Run: limited to

☒ Complete Run

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.

Business Card

Contact: Emily Dunn

Company: Boomer's Artwork

Title: Sales Representative

Department:

Salutation: Emily

Phone: (602) 555-4874

Mobile: (602) 555-1142

E-mail:

Last Results:

Address

Address 1: 8907 E. Rosebud Lane

Address 2: Suite 25

City: Scottsdale

State/ZIP: AZ 85258

Country: United States

Fax: (602) 555-8848

Personal E-mail:

Web Site:

Status

ID/Status: Prospect

Referred By:

Latest Activities

E-mail: 6/9/2005

Call Attempt/Reach:

Meeting:

Letter Sent:

Edited On/By: 12/8/2009 Chris Huffman

Secondary Contacts

| Contact | Title | Phone | Extension | E-mail | Address 1 | City | State | ZIP |
|-----------------|----------------------|----------------|-----------|--------|------------------------|-------------|-------|-----|
| Linda C. Boy | Sales Representative | | | | 8907 E. Rosebud Lane | Detroit | MI | |
| Jimmy Gingerich | | | | | | | | |
| Joe Gladney | | | | | | | | |
| Jack Mertens | Sales Representative | (602) 555-4874 | | | 8907 E. Rosebud Lane | Atlanta | GA | |
| Adam Poe | | | | | | | | |
| Paul Shank | QA Manager | 310-622-1500 | | | 2000 Santa Monica Frwy | Los Angeles | CA | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Mapping

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

| 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 checked="" type="checkbox"/> | Password | String | <input checked="" type="checkbox"/> | No Transformation |
| Source Table Column | ContactName | <input checked="" type="checkbox"/> | Contact Name | String | <input checked="" type="checkbox"/> | No Transformation |
| Source Table Column | Role | <input checked="" type="checkbox"/> | Role | String | <input checked="" type="checkbox"/> | No Transformation |
| Source Table Column | Status | <input checked="" type="checkbox"/> | Status | String | <input checked="" type="checkbox"/> | No Transformation |
| Source Table Column | | <input checked="" type="checkbox"/> | Record ID (ACT! GUID) | String | <input checked="" 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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 | Administrator | 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 | Administrator | 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



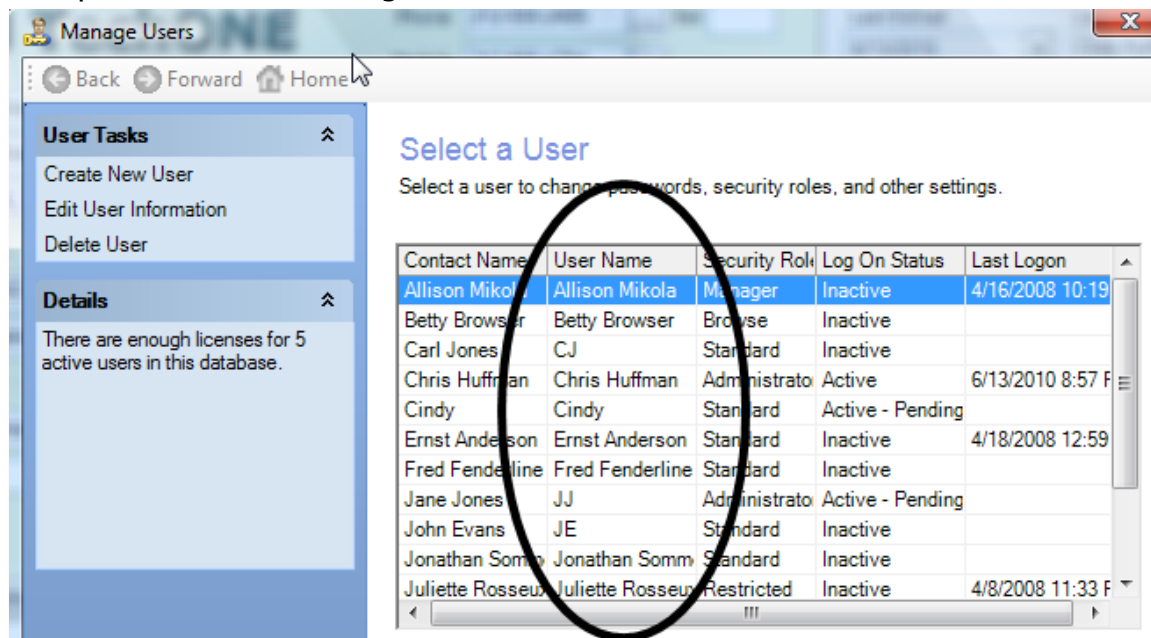
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

Back Forward Home

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's | 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 | 310-622-1507 | 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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| <i>Selecting Import Source and Merge Destination</i> | |
|--|---|
| 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 |
| <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 | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:

☒ Display

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

MERGE RULES (related to matching)

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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, Jo | ZZZ_ASHLEY | Betty Browser |
| Yellow Jer | Ashley All | ToDoDone | 7/6/2001 | Sent prop | Quoted n | ZZZ_ASHLEY | Betty Browser |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Mapping: Link to Contacts by OAKMergeID

Merge Rules

ACT! Table:

Delimited File (csv or txt) Table:

☒ Display

| Merge Source | Source Field or Value | ACT! Fields | Data Type | Required | Transfer |
|-----------------------|-----------------------|--------------------------------------|-----------|----------|----------|
| > 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** **Pr**



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

CH TechONE

Phone (602) 555-4874 Ext. Mobile (602) 555-1142 Fax (602) 555-8848 E-mail Web Site

Contact Emily Dunn Salutation Emily Company Boomer's Artworx Key Contact ☐ Title Sales Representative Department ID/Status Prospect Referred By 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 Last E-mail 6/9/2005 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 | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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!



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

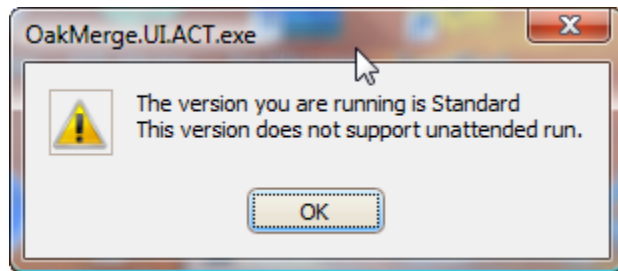
Group records does not support the OAKMergeID linking field.

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:





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 3 rows
☐ Complete Run

Execution Logging Level: Full Logging

Number of rows to skip: 0

MAPPING (Contains Field Mapping and Merge Rules)

Name:
Description:

PROFILE (Contains Complete Merge Configuration including Mapping)

Name: Add Tradeshow info
Description:

CREATE/SAVE

MERGE CONFIGURATION

Delimited File (csv or txt)

file_name: C:\E Tech Systems\ACT\1_Contacts_updates.csv
first_row_as_header: True
delimiter: Comma
encoding:

Act!

database: C:\ACTDATA\ETS_Master_v24.pad
user: Alan
pwd:
group:

CSV Table

Act! Contacts

Merge Options:

Match Found: Update
Match Not Found: Add
Field Update Condition: UpdateAlways

Matching Fields:

Contact
Source Table Column: Contact
Company: Source Table Column: Company
Title: Source Table Column: Title
Address1: Source Table Column: Address1

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.

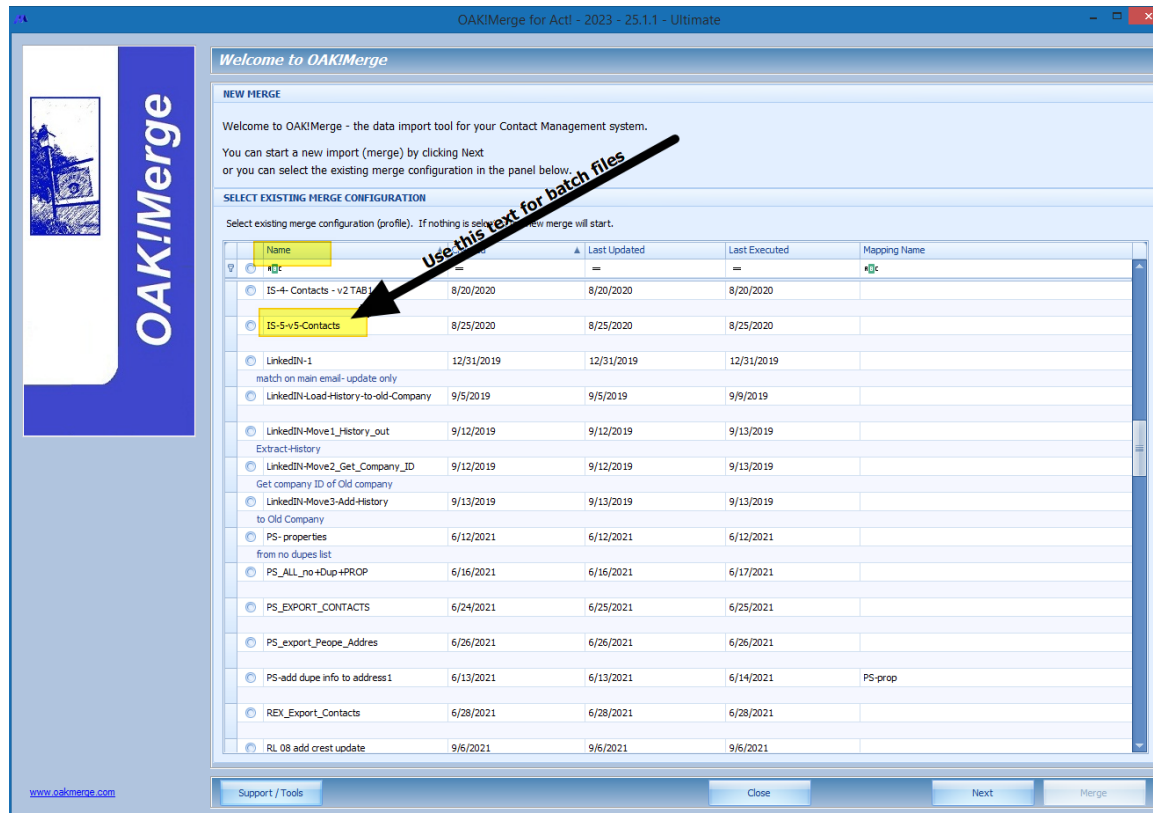
A batch file is a plain text file that ends in .bat
You can create and edit them using notepad.exe



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23



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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 displays three screenshots of the 'Ready to Run' dialog box in OAK!Merge, specifically the 'EXECUTION OPTIONS' section. Each screenshot shows the same settings for 'Validate / Preview', 'Test Run: limited to 3 rows', and 'Complete Run' (selected). The 'Number of rows to skip' is set to 0. The 'Execution Logging Level' dropdown menu is open in each, showing different options:

- Top Screenshot:** The dropdown menu is open, showing options: 'Errors and Warnings', 'No Logging', 'Errors Only', 'Errors and Warnings', and 'Errors, Warnings and Skipped Records'. The 'Errors, Warnings and Skipped Records' option is highlighted.
- Middle Screenshot:** The dropdown menu is open, showing options: 'Errors and Warnings', 'Records skipped due to merge rules', 'Records deleted due to merge rules', 'Only appended records', and 'Only updated records'. The 'Only updated records' option is highlighted.
- Bottom Screenshot:** The dropdown menu is open, showing options: 'Errors and Warnings', 'Only appended records', 'Only updated records', 'Records processed successfully (appended, updated or deleted)', and 'Full Logging'. The 'Full Logging' option is highlighted.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

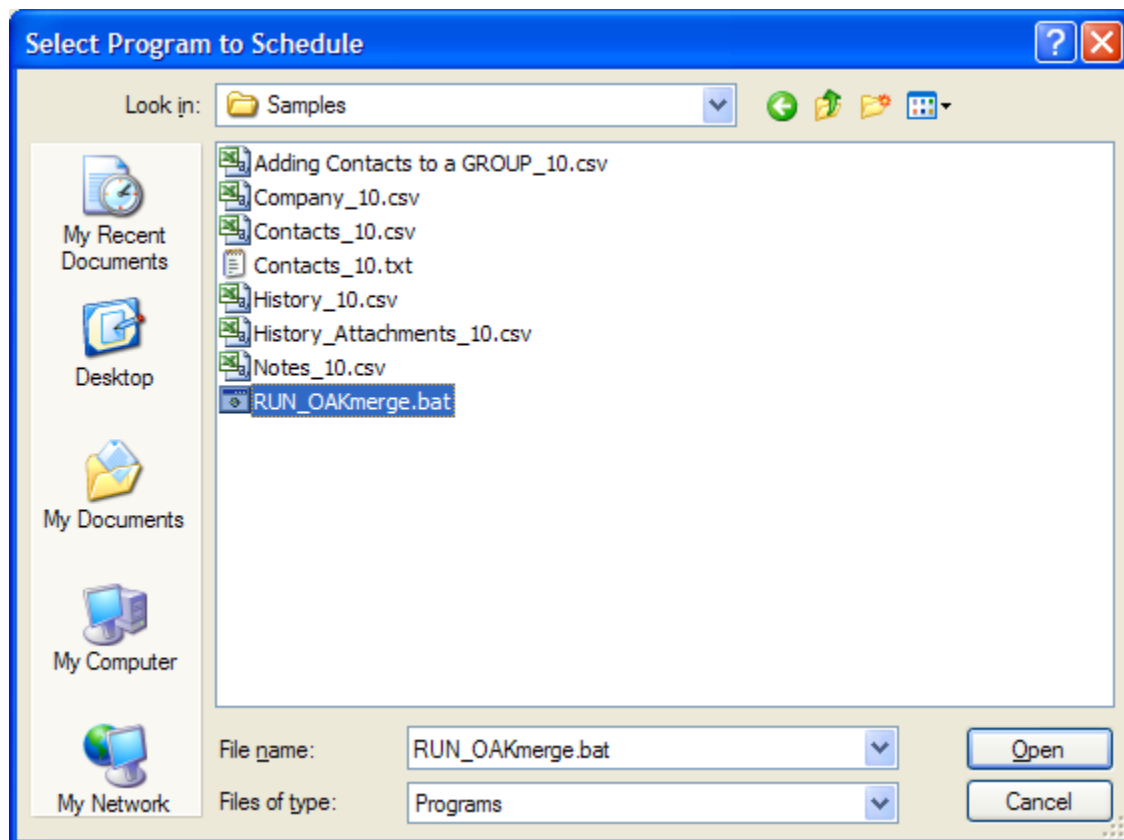


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

```
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 . . .
```





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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! |
| ACT! PAD File | C:\Users\Public\Documents\ACT\ACT Data\Databases\ACTSource.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 can also make the source and target the same database to merge Groups to Opportunities for example



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

Merge Rules

ACT! Table: Groups

Source Table: Contacts

ACT! Fields: Groups, Companies, Contacts, History, Notes, Activities, Opportunities

Select a Target Table

Tables for target and source:

A contact TO opportunity merge might be mapped like this

Merge Rules

ACT! Table: Opportunities

Source Table: Contacts

Unmap All

Display Mapped Only

| Merge Source | Source Field or Value | Matching Fields | ACT! Fields | Data ... | Required | Transform |
|---------------------|-----------------------|-------------------------------------|--------------------------------|----------|-------------------------------------|--------------|
| Source Table Column | USER5 | <input checked="" type="checkbox"/> | Opportunity Name | String | <input checked="" type="checkbox"/> | No Transform |
| Constant Value | Initial Communication | <input type="checkbox"/> | Status | String | <input type="checkbox"/> | No Transform |
| Constant Value | CHT 1 Sales | <input type="checkbox"/> | Process | String | <input type="checkbox"/> | No Transform |
| Source Table Column | REFERRED BY | <input type="checkbox"/> | Referred By | String | <input type="checkbox"/> | No Transform |
| Source Table Column | __RECORD_ID__ | <input type="checkbox"/> | OAKMergeID | String | <input type="checkbox"/> | No Transform |
| Source Table Column | USER1 | <input type="checkbox"/> | Opportunity Field 1 | String | <input type="checkbox"/> | No Transform |
| Source Table Column | USER2 | <input type="checkbox"/> | Opportunity Field 2 | DateTime | <input type="checkbox"/> | No Transform |
| Source Table Column | USER3 | <input type="checkbox"/> | Opportunity Field 3 | String | <input type="checkbox"/> | No Transform |
| Source Table Column | USER4 | <input type="checkbox"/> | Opportunity Field 4 | String | <input type="checkbox"/> | No Transform |
| Source Table Column | USER5 | <input type="checkbox"/> | Opportunity Field 5 | String | <input type="checkbox"/> | No Transform |
| Source Table Column | USER6 | <input type="checkbox"/> | Opportunity Field 6 | String | <input type="checkbox"/> | No Transform |
| Source Table Column | __RECORD_ID__ | <input type="checkbox"/> | Link To: Contacts by ACT! GUID | String | <input type="checkbox"/> | No Transform |

MERGE RULES (related to matching)

If a Match is Found: Update

If a Match is NOT Found: Add

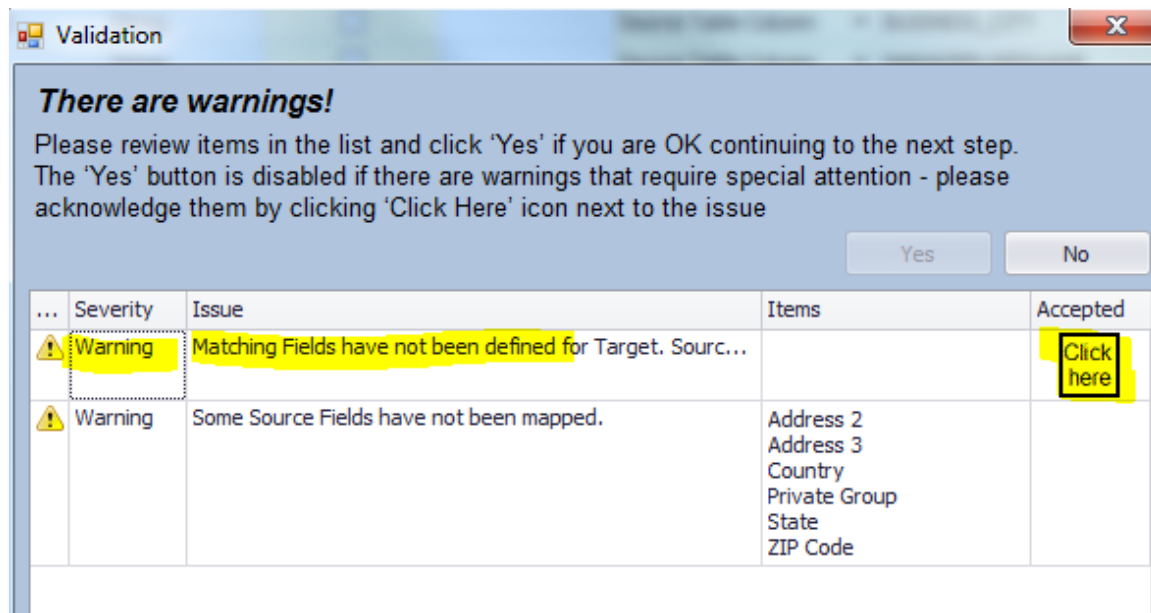


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 Update If a Match is NOT Found Add

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 Update If a Match is NOT Found Add

Support / Tools Close Back

To update existing and Add new:

MERGE RULES (related to matching)

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

Support / Tools Close Back

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

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



OAK!Merge User's Guide

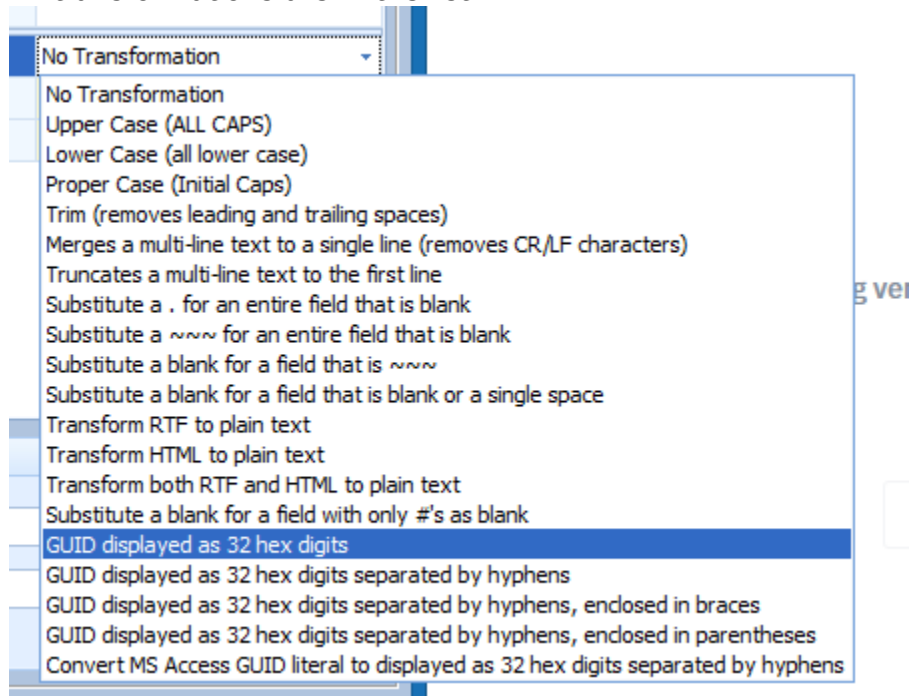


Act! Version 25.1.1 Revised 6/1/23

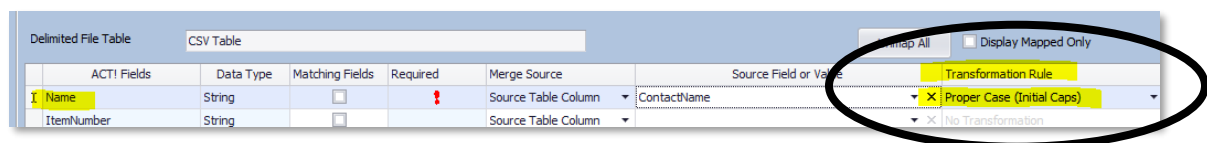
Example 20: Transformations and Reserved Key Words

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

- 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 | | Contacts | | | | | |
| Delimited File Table | | CSV Table | | | | | |
| | | Unmap All | | | | | |
| | | Display Mapped Only | | | | | |
| ACT! Fields | Data Type | Matching Fields | Required | Map 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

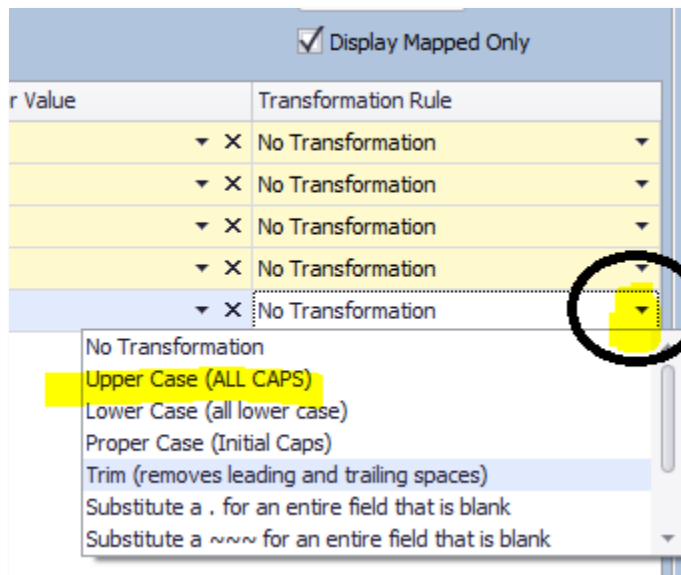
Click the down arrow to see the available transformations



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23



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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

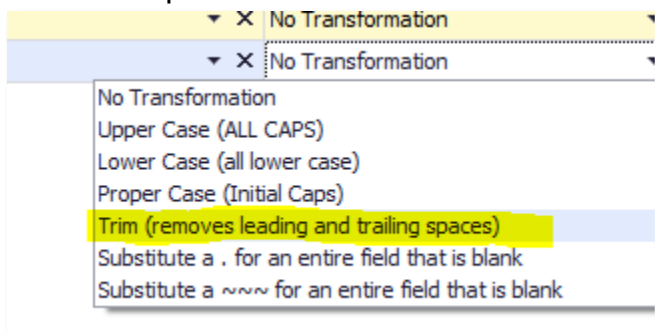
This is a TEST is transformed to: This Is A Test

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| | | |
|---------------------|---------------------|--|
| 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 | String | NO 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 |
| Used if all the records were created in v22 or later | | 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| 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 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 |

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



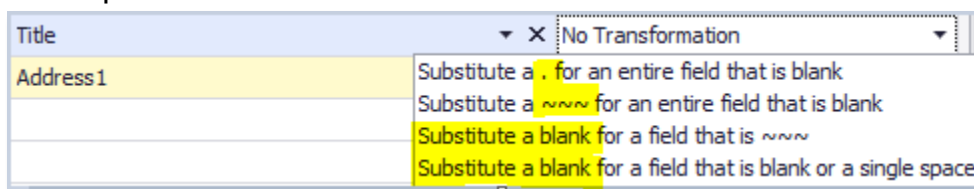
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:

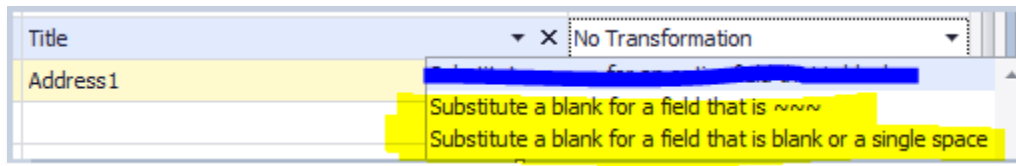
Use 1 of 2 transformations or a Reserved Key Word: \$BLANK\$



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23



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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

\$BLANK\$

\$BLANK\$ overwrites a text field in Act! with a blank field if the source 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.

| 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 |

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

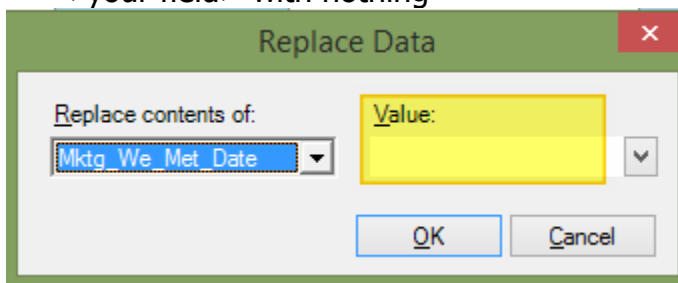
Row 2 in 7 would over write any data in Act! for Referred by and blank the field only for that contact. This assumes you are matching on RecordID and Updating the contacts

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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)



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

Companies

Lookup

Company Field: Company

Contains: [] Go

More Options...

Related Tasks

- Create New Contact from Company
- Lookup Company Contacts
- View Fields Linked to Contacts
- Update Fields Linked to Contacts
- Write E-mail Using Template
- Schedule Activity Series
- Modify Layout
- View Groups/Companies

All Companies - 25 company(s), 8 division(s)

- 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
 - CH TechONE - Accounting
 - CH TechONE - Administration
 - CH TechONE - Sales
- Circle Photography
- Freemont Corp
- Green Plastics
- Gripping 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

CH TechONE

Company: CH TechONE

Phone: (212) 555-2485

Fax: (212) 555-8745

Toll-Free: (800) 555-2157

Web Site: www.CHTechONE.com

ID/Status: []

Referred By: []

Divisions

- CH TechONE - Accounting
- CH TechONE - Administration
- CH TechONE - Sales



OAK!Merge User's Guide



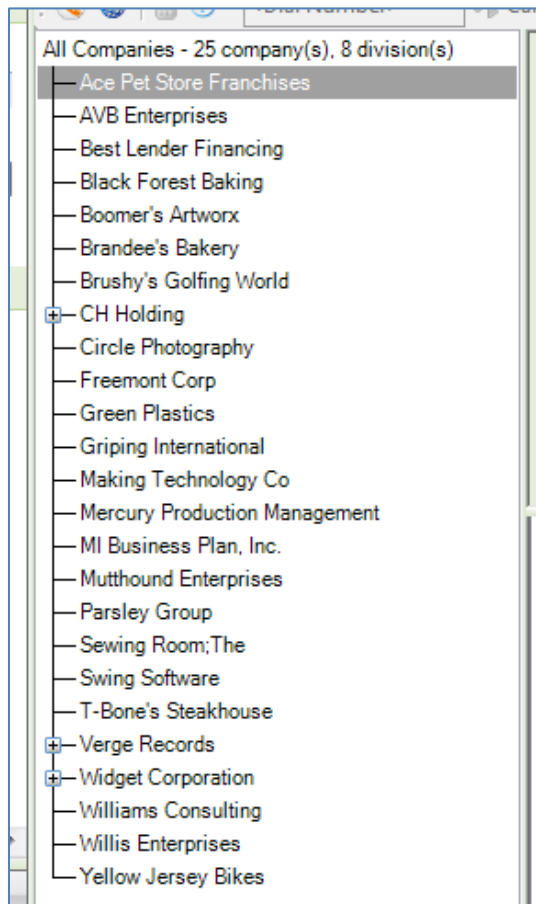
Act! Version 25.1.1 Revised 6/1/23

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





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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"/> | | Source Table Col... | COMPANY | No Transformation |
| Link To: Company by Name | String | <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

Support / Tools Close Back Next Finish

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

After updates by OAK!Merge





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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**

☒ **Display Mapped Only**

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| Import for table Groups has completed succesfully. | | |
|--|------------------------------|--------------------------------|
| 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:

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|---------|------------|---------------|-----------|------------|---|-----------|------------|---------|-----------------------|--|--|--|--|--|--|---|------------------------------|--|--|--|--|--|--|------------------------------|------------------------------|--|--|--|--|--|--|--------------------|--------------|--|--|--|--|--|--|--|---|--|--|--|--|--|--|
| <ul style="list-style-type: none">Friends<ul style="list-style-type: none">FaceBookLinkedINHot DealsNATIE Board MembersProspectsRecently Added ContactsRecently Edited ContactsStaff<ul style="list-style-type: none">Employees<ul style="list-style-type: none">International EmployeesAsiaPac EmployeesEuropean EmployeesShift 1Shift 2Shift 3USA Employees | Edit Date 5/13/2007 Last Edited by Chris Huffman | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | <table><tr><td>Contacts</td><td>Notes</td><td>History</td><td>Activities</td><td>Opportunities</td><td>Documents</td><td>Group Info</td><td>Address</td></tr><tr><td colspan="7">Create Date 6/23/2005</td><td>Hierarchy Staff->Employees->International Employees</td></tr><tr><td colspan="7">Record Creator Chris Huffman</td><td>Subgroups: AsiaPac Employees</td></tr><tr><td colspan="7">Record Manager Chris Huffman</td><td>European Employees</td></tr><tr><td colspan="7">Access Level</td><td></td></tr><tr><td colspan="7"><input checked="" type="radio"/> Public</td><td></td></tr></table> | | Contacts | Notes | History | Activities | Opportunities | Documents | Group Info | Address | Create Date 6/23/2005 | | | | | | | Hierarchy Staff->Employees->International Employees | Record Creator Chris Huffman | | | | | | | Subgroups: AsiaPac Employees | Record Manager Chris Huffman | | | | | | | European Employees | Access Level | | | | | | | | <input checked="" type="radio"/> Public | | | | | | |
| Contacts | Notes | History | Activities | Opportunities | Documents | Group Info | Address | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Create Date 6/23/2005 | | | | | | | Hierarchy Staff->Employees->International Employees | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Record Creator Chris Huffman | | | | | | | Subgroups: AsiaPac Employees | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Record Manager Chris Huffman | | | | | | | European Employees | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Access Level | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="radio"/> Public | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

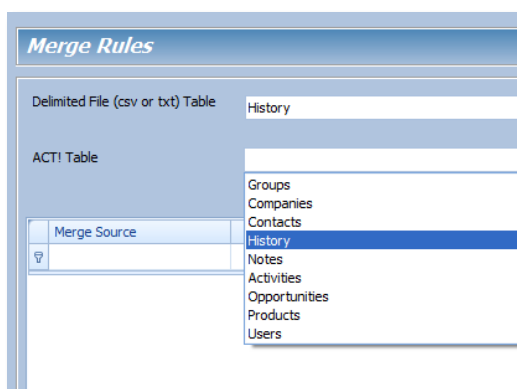


OAK!Merge User's Guide

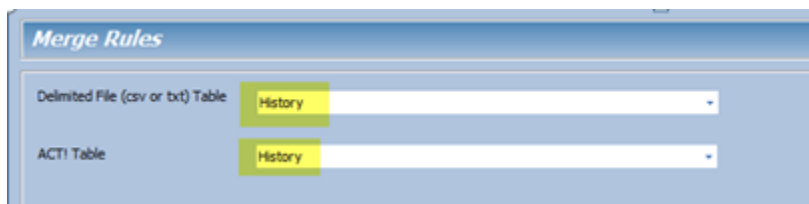


Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

4. 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 Rules

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

ACT! Table: **History**

☒ Display Mapped Only

| 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.

5. Pick execution option and Run

Ready to Run

EXECUTION OPTIONS

☐ Validate only

☐ Test Run: limited to rows

☒ Complete Run

Execution Logging Level: **Errors and Warnings**

MAPPING INFORMATION



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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\Logs\
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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

\$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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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... _RECORD_ID_ | _RECORD_ID_ | _RECORD_ID_ | 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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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... > | <u>__GROUPS__</u> | <u>__GROUPS__</u> | 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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

The screenshot shows the CH TechOne software interface. On the left, a sidebar lists various groups, with 'OAKMerge_Export' highlighted. The main panel displays the details for this group, including a description field, an edit date of 11/25/2014, and the last edited by Chris Huffman. At the bottom, a table shows contact information for William Cadbury, including his company and phone number.

| Contact | Company | Phone |
|-----------------|---------|---------|
| William Cadbury | | 0121451 |

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)



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

Selecting 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: Copy Up Copy Down Swap

MERGE DESTINATION

Type: Act!

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

User Id: alan

Password:

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

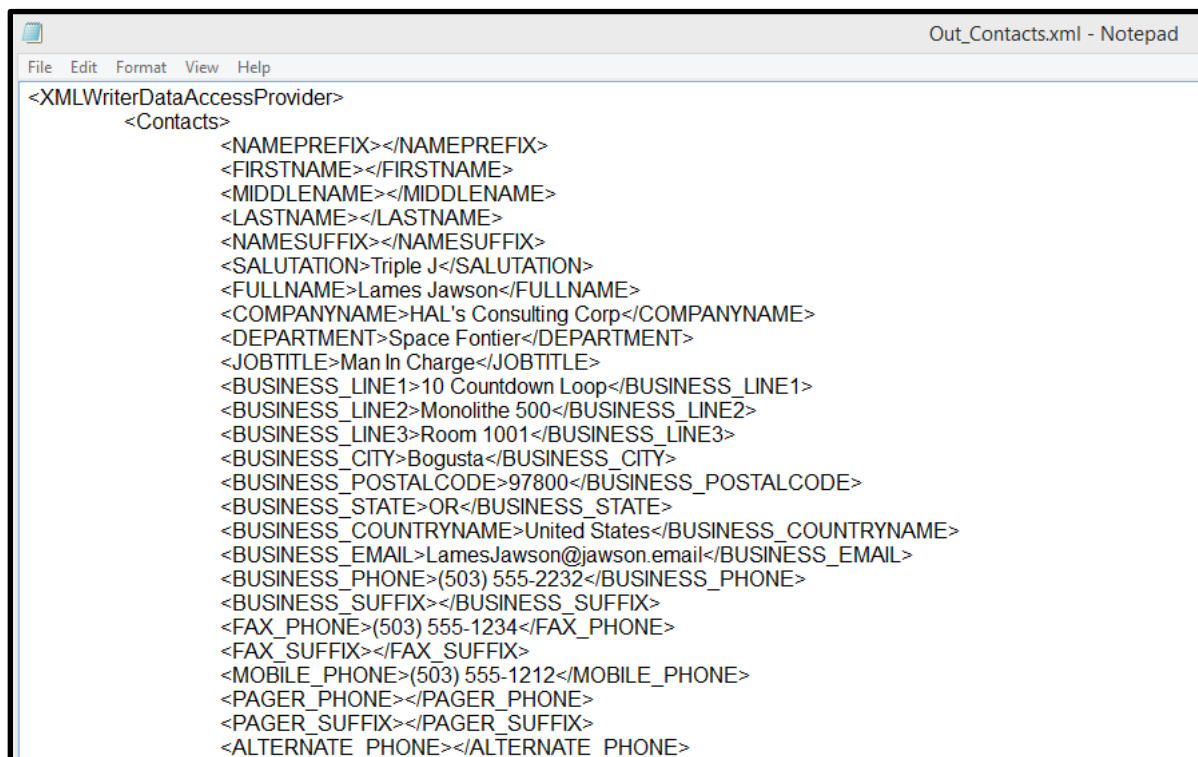


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Example; The contacts table exported to XML starts out as



```
<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>LamesJawson@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

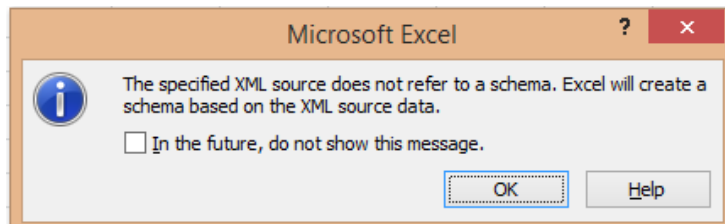
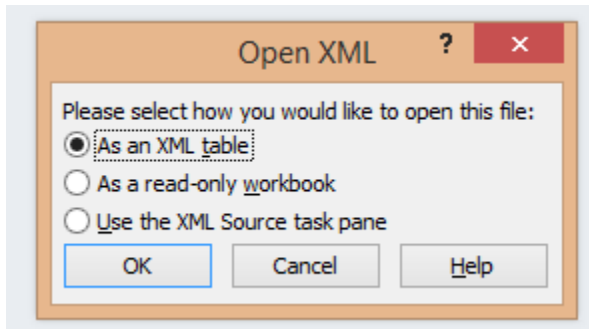


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

IN EXCEL you get 2 questions, click on OK



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

FileHomeInsertPage LayoutFormulasDataReviewViewAdd-Ins

Design

Table Name: Table1
Table Tools
Table
Properties
Summary with PivotTable
Remove Duplicates
Resize Table
Convert to Range
Tools

Export Refresh
Open in Browser
Unlink
External Table Data

Header Row
Total Row
Banded Rows
Table Style Options

First Column
Last Column
Banded Columns

Table Styles

A1

NAMEPREFIX

Export the data in this table to a SharePoint list or Visio diagram.

| | 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 Frw |
| 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. |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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\ACT2014\Demo.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_to_Delete_18_1.csv

Delimiter: Comma

☒ First Row Contains Field Names



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Merge Rules

Delimited File (csv or txt) Table:

ACT! Table:

| 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__ |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 |
|----|------|------|------|-----------------------|--------------------------------------|-----------|-----------|-----------|-----------|----------------|----------|--------------------------|--|----------------------------------|-------------|
| 1 | RECC | RECC | RECC | COMPANY_NAME | RECORD_ID | RECORD_ID | RECORD_ID | RECORD_ID | RECORD_ID | RECORD_ID | ACTIVITY | HISTORY_TYPE | REGARDING | DETAILS | START_TIME |
| 2 | | | | Freemont Corp | 59134f70-ce89-4730-bb93-3743a5f6bd35 | | | | | Allison Mikola | | Opportunity Won | Home Office \$12,000.00 Clo | (\rft1\ansi\ansicpg1252\deffo\ | 7/30/2014 1 |
| 3 | | | | Circle Photography | 5446d914-17a2-4ef9-9ad6-7453fa464ef6 | | | | | Chris Huffman | | Opportunity Won | Plano Plant \$12,000.00 Close | (\rft1\ansi\ansicpg1252\deffo\ | 4/18/2014 1 |
| 4 | | | | Circle Photography | 5446d914-17a2-4ef9-9ad6-7453fa464ef6 | | | | | Allison Mikola | | New Opportunity | New Opportunity - ACTI Sales Cycle Commitment to Buy 100 | | 4/18/2014 1 |
| 5 | | | | Circle Photography | 5446d914-17a2-4ef9-9ad6-7453fa464ef6 | | | | | Allison Mikola | | New Opportunity | New Opportunity - ACTI Sales Cycle Needs Assessment 25% | | 4/18/2014 1 |
| 6 | | | | Mutthound Enterprises | 4ca069af-6ead-4dbb-9e55-006e1e783b25 | | | | | Chris Huffman | | New Opportunity | SC - ACTI Sales Cycle Negotiation 65% | | 1/5/2014 1 |
| 7 | | | | Mutthound Enterprises | 4ca069af-6ead-4dbb-9e55-006e1e783b25 | | | | | Chris Huffman | | Opportunity Won | New Opportunity \$12,000.00 (\rft1\ansi\ansicpg1252\deffo\ | | 5/17/2014 1 |
| 8 | | | | Mutthound Enterprises | 4ca069af-6ead-4dbb-9e55-006e1e783b25 | | | | | Chris Huffman | | New Opportunity | New Opportunity - ACTI Sales Cycle Initial Communication 1 | | 1/4/2014 1 |
| 9 | | | | Mutthound Enterprises | 4ca069af-6ead-4dbb-9e55-006e1e783b25 | | | | | Chris Huffman | | Opportunity Won | New Opportunity \$9,000.00 (\rft1\ansi\ansicpg1252\deffo\ | | 5/17/2014 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-b7fc-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 | | 7/2/2014 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 | ##### | 10/2/2014 |
| 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 (\rft1\ansi\ansicpg1252\deffo\ | | 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 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 | (\rft1\ansi\ansicpg1252\deffo\ | 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 |
|----|----------|----------------|-----------------------------------|---------|-----------------|----------|---------|---------|--------------------------------------|---|
| 1 | ACTIVITY | HISTORY_TYPE | REGARDING | DETAILS | START_TIME | END_TIME | ATTACHM | ATTACHM | RECORD_ID | |
| 2 | | Contact Linked | Contact Bettie James linked | | 12/1/2014 13:31 | ##### | | | fe943559-7f31-4358-b769-7431400d32e6 | |
| 3 | | Contact Linked | Contact Bettie James linked | | 12/1/2014 13:26 | ##### | | | 11c24c44-ed33-46c2-aadd-82d555d75213 | |
| 4 | | Contact Linked | Contact Emily Dunn linked | | 12/1/2014 13:26 | ##### | | | d3589957-0405-4263-a00b-b49bf269ad96 | |
| 5 | | Contact Linked | Contact Emily Dunn linked | | 12/1/2014 13:31 | ##### | | | 8b05e77e-5922-4a9b-b364-da74a101ca4e | |
| 6 | | Contact Linked | Contact Benjamin Braddock linked | | 4/10/2014 23:53 | ##### | | | a191afa7-06f9-41a3-81bf-32e2a2d513af | |
| 7 | | Contact Linked | Contact <empty> linked | | 4/10/2014 23:54 | ##### | | | 227a368c-18a3-4066-a635-551ce146418 | |
| 8 | | Contact Linked | Contact Elaine R. Braddock linked | | 4/10/2014 23:53 | ##### | | | 410723f9-b893-4094-bb80-5faf6cbf78e0 | |
| 9 | | Contact Linked | Contact Mr. McGuire linked | | 4/10/2014 23:53 | ##### | | | b8d750c0-db1c-459f-8a46-adb7c556e884 | |
| 10 | | Contact Linked | Contact Chris Huffman linked | | 5/1/2014 19:03 | ##### | | | 535b832f-9b61-4bf0-9945-94bb095836e9 | |
| 11 | | Contact Linked | Contact Chris Huffman linked | | 4/30/2014 12:34 | ##### | | | c5d8badd-9089-4de3-9a91-3e9df85c3d27 | |
| 12 | | Contact Linked | Contact Keifer Saccucci linked | | 5/6/2014 18:22 | ##### | | | 633b5f6c-9c3c-471c-9dff-c59397d3b3aa | |
| 13 | | Contact Linked | Contact Bella Minoal linked | | 12/1/2014 13:29 | ##### | | | 3e3e6b8e-3591-44ef-9545-629a9aea0890 | |
| 14 | | Contact Linked | Contact Bella Minoal linked | | 12/1/2014 13:31 | ##### | | | 89fe11f5-28b5-4174-9660-c006486f8717 | |
| 15 | | Contact Linked | Contact Bella Minoal linked | | 12/1/2014 13:30 | ##### | | | 0d27d1c4-bf27-40f4-b7f8-f7780ff52d6f | |
| 16 | | Contact Linked | Contact Suzie Lee linked | | 5/6/2014 18:22 | ##### | | | b523ca84-2822-4a8a-8ffd-a8f63f54cad7 | |
| 17 | | Contact Linked | Contact Jason Mighty linked | | 4/23/2014 11:25 | ##### | | | 5a93c26b-5926-480c-a75f-05985a735af5 | |
| 18 | | Contact Linked | Contact Howard Smith linked | | 4/23/2014 11:25 | ##### | | | 859b5ecd-15e3-4cc3-b576-1f6d571cba25 | |
| 19 | | Contact Linked | Contact Melissa Weather linked | | 4/23/2014 11:23 | ##### | | | dc42a6f5-9127-4db4-a49d-9f249528f530 | |
| 20 | | Contact Linked | Linked to company AVB Enterprises | | 5/6/2014 18:22 | ##### | | | b9ccce24-e7ca-477f-88d0-5a6e550688ca | |
| 21 | | | | | | | | | | |
| 22 | | | | | | | | | | |
| 23 | | | | | | | | | | |
| 24 | | | | | | | | | | |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:

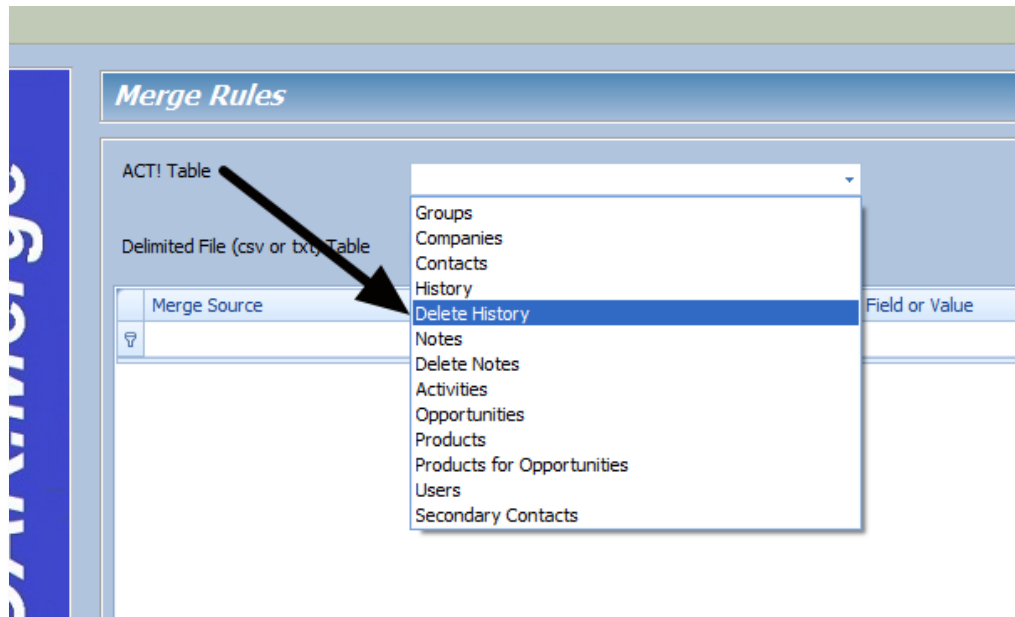


OAK!Merge User's Guide

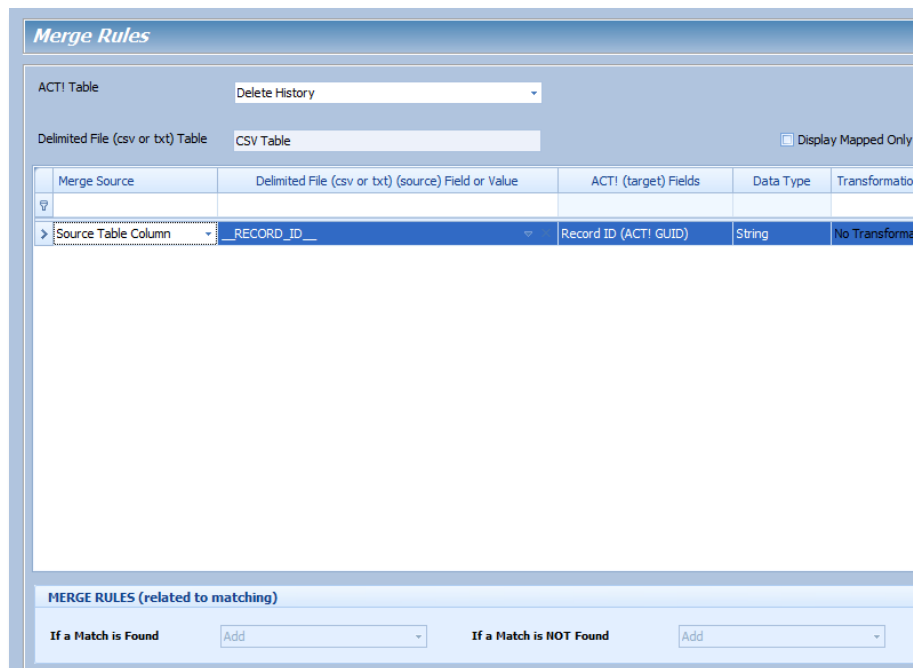


Act! Version 25.1.1 Revised 6/1/23

Select "Delete History" as the target Act! Table



Map the one field: __RECORD_ID__





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Click Yes for warnings that some field are not mapped.

There are warnings!

Please review items in the list and click 'Yes' if you are OK continuing to the next step.
The 'Yes' button is disabled if there are warnings that require special attention - please acknowledge them by clicking 'Click Here' icon next to the issue

Yes No

| ... | Severity | Issue | Items | Accepted |
|-----|----------|--|--|----------|
| | Warning | Some Source Fields have not been mapped. | RECORD_CONTACT_NAME RECORD_CONTACT_GUID RECORD_CONTACT_ID RECORD_COMPANY_NAME RECORD_COMPANY_GUID RECORD_OPPORTUNITY_NAME RECORD_OPPORTUNITY_GUID RECORD_GROUP RECORD_GROUP_GUID RECORD_USER ACTIVITY_TYPE HISTORY_TYPE REGARDING DETAILS START_TIME END_TIME ATTACHMENT_NAME ATTACHMENT_FILENAME | |

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

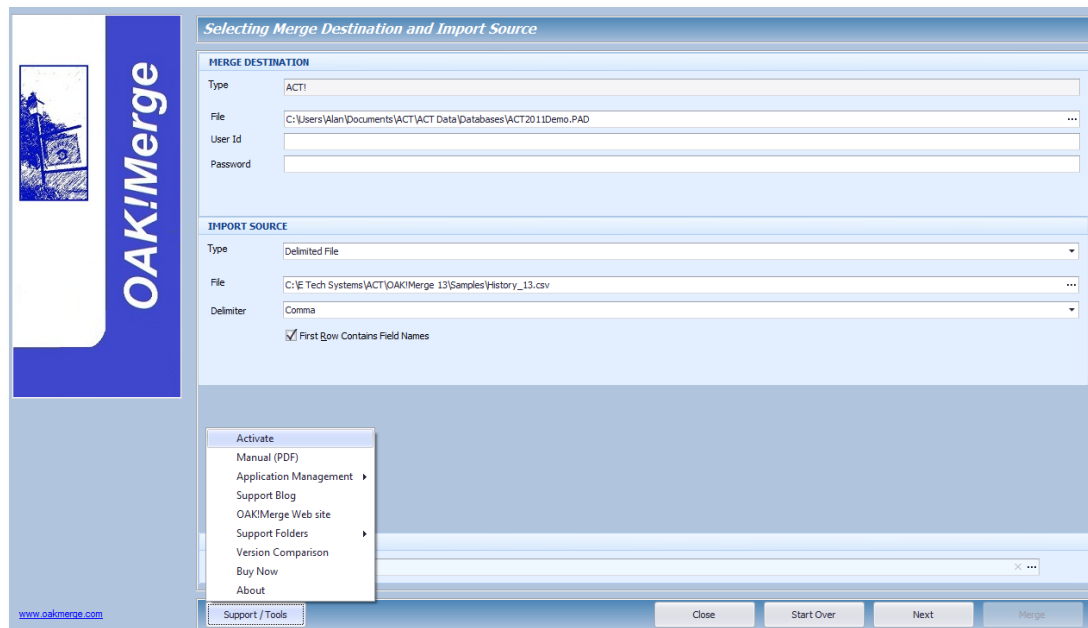
Section 4: Activation

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



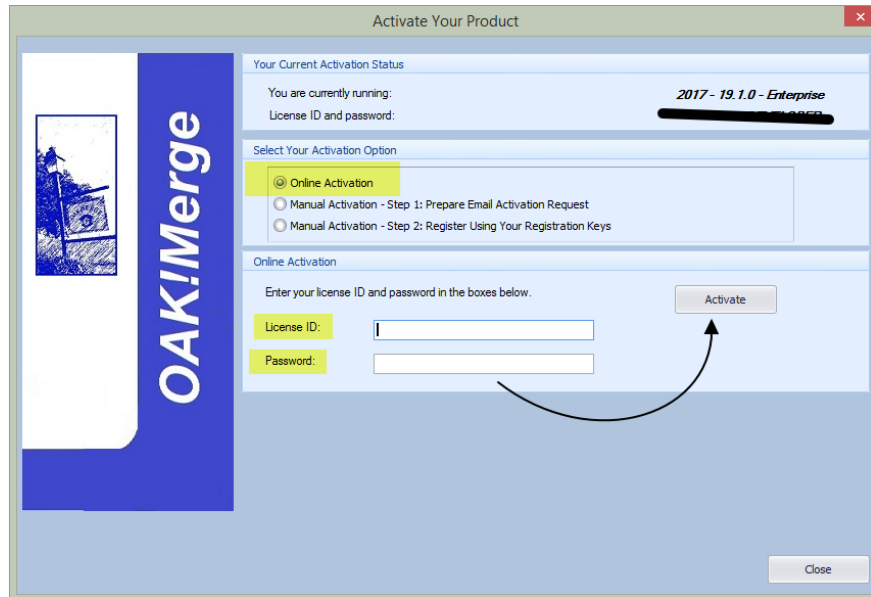


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

OAK!Merge

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:

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.

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.



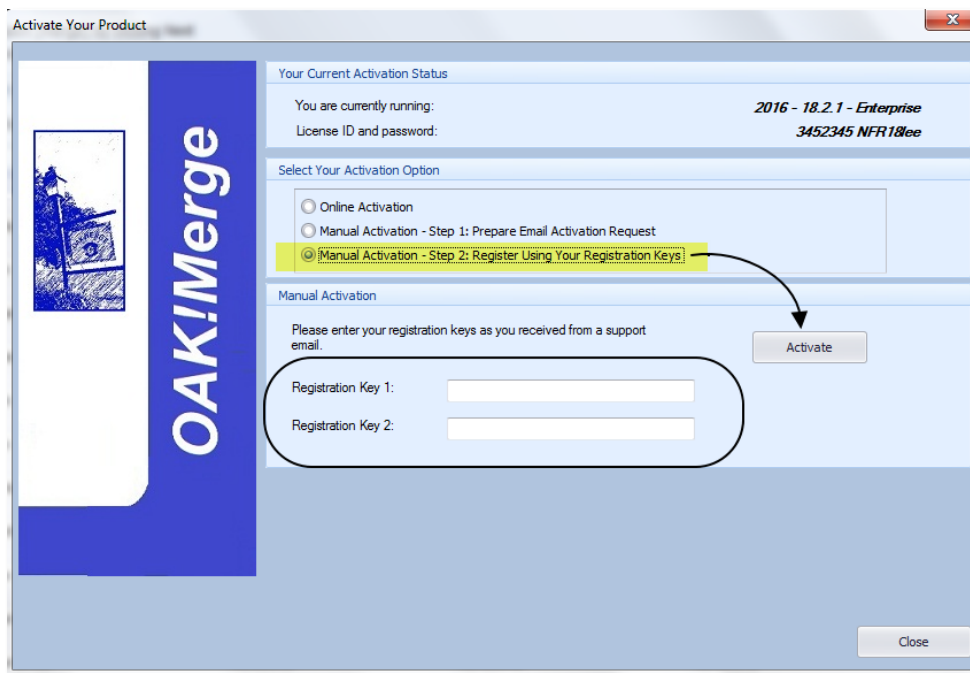
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

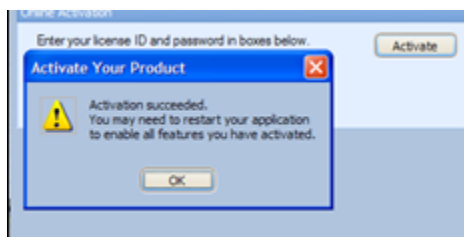
Email your Activation info to Support@OAKNerge.com. They will send you back 2 Registration Keys for you to enter in Step 2.

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



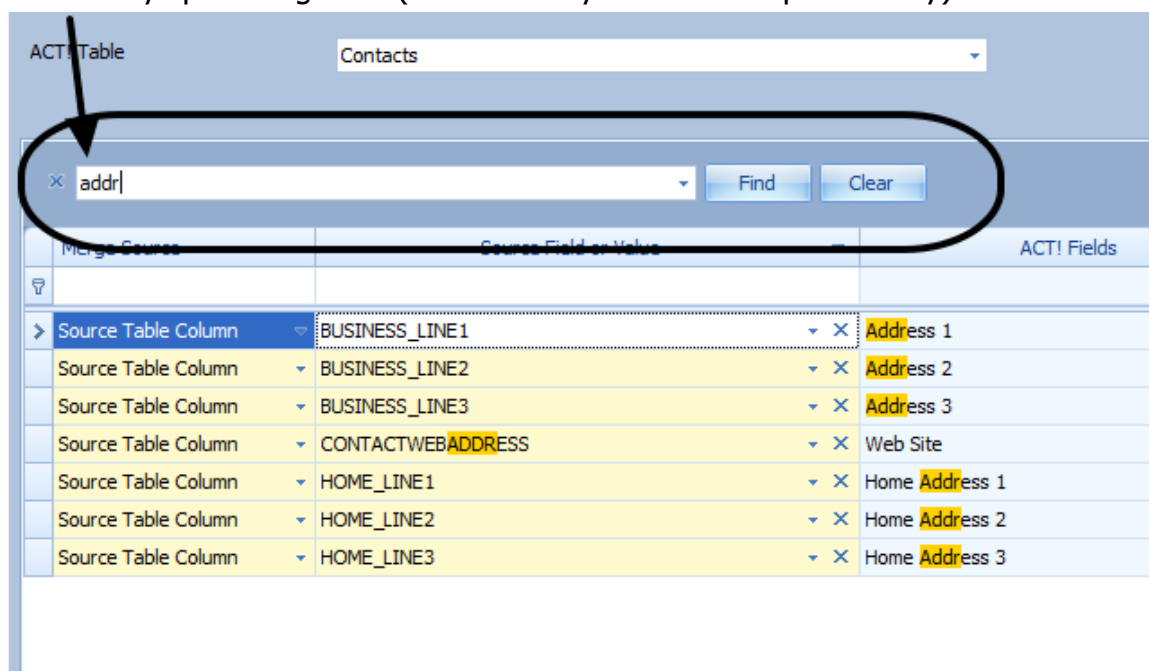
Act! Version 25.1.1 Revised 6/1/23

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



| 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 | |

The screenshot shows the 'ACT! Fields' table with the 'Data Type' column header circled in red. A dropdown menu is open for the 'Data Type' column, displaying the following options: (Select All), Boolean, DateTime, Decimal, Int32, and String. The 'Boolean' option is highlighted. The table also has columns for 'Required' and 'Transformation Rule'. The 'Transformation Rule' column shows 'No Transformation' for all rows.

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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!."



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 |

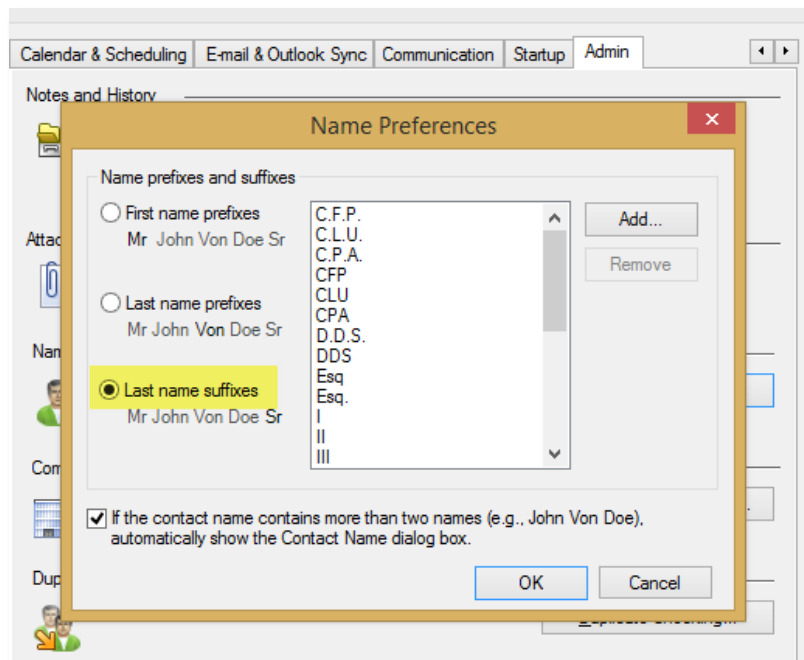
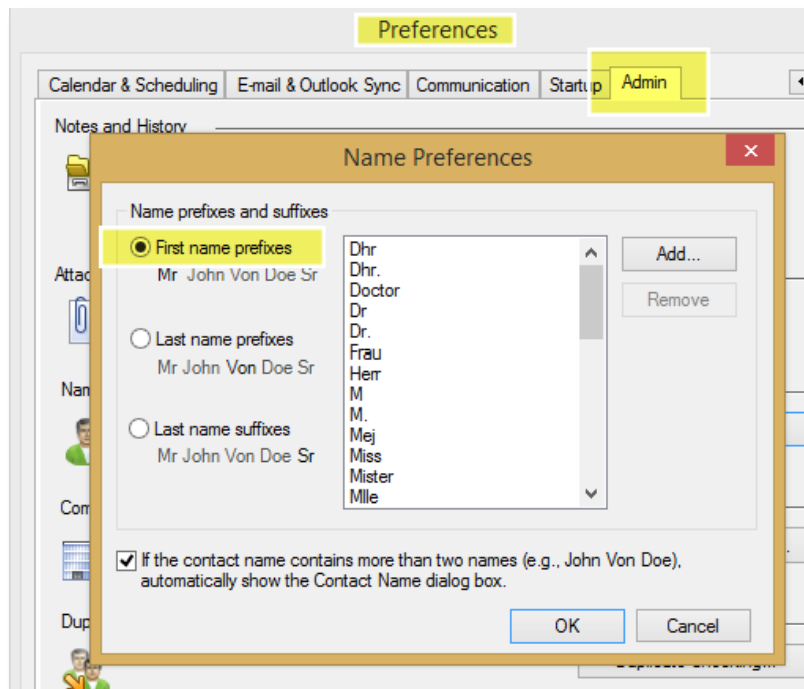
Set the Prefixes and Suffixes Names lists in Act! under: Preferences, ADMIN TAB, "Name Preferences" Button



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23





OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

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:

Password:

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

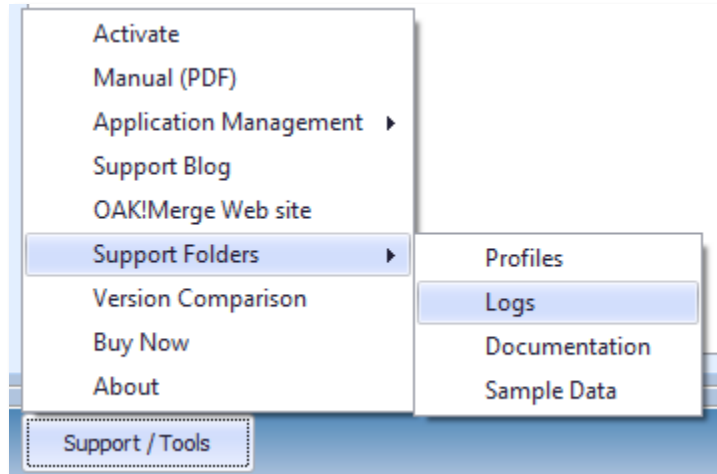
You can open and review them to see details of a merge operation. The log files have the info on which records skipped, added, deleted, or merged when FULL LOGGING is selected as the logging level.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23



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:



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| | Level | LevelNumeric | 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

-----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>
```



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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 text box]

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

| Clipboard | | Font | | Alignment | | Number | | Styles | | | | | | | | |
|-----------|-----------------------------------|------|--------------|------------|----------------------|------------|------|--------|-------|---------|----------|------------|------------|-----------------------|---|---|
| N1 | | fx | | Pain Point | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| | 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 Balance | Pain Point | | |
| 2 | Duke Indu Nathan Cutting Brittles | | 310-622-1507 | | 4075 Santa Monica Fl | Los Angeli | CA | | 90029 | A_0026 | 400000 | 50000 | 20000 | Licensing;Roadmap;TBD | | |
| 3 | Duke Indu Marion Morrison | | 310-622-11 | Founder | 4075 Santa Monica Fl | Los Angeli | CA | | 90029 | A_0027 | 500000 | 50000 | | Licensing | | |
| 4 | Duke Indu Kirby York | | 310-622-1506 | | 4075 Santa Monica Fl | Los Angeli | CA | | 90029 | A_0028 | 600000 | 50000 | | Licensing;TBD | | |
| 5 | Duke Indu Ethan Edwards | | 310-622-1501 | | 4075 Santa Monica Fl | Los Angeli | CA | | 90029 | A_0029 | 700000 | 50000 | | TBD | | |
| 6 | | | | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | | | | |
| 8 | | | | | | | | | | | | | | | | |

Pain Point

Licensing;Roadmap;TBD

Licensing

Licensing;TBD

TBD

Sample Mapping



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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!

Schedule Write Reports Tools Emarketing Help

Forward New Call Meeting To-Do Note History E-mail Help

1 of 8

| Company | Contact | Phone | Fax Phone | Mobile Phone | 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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.

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

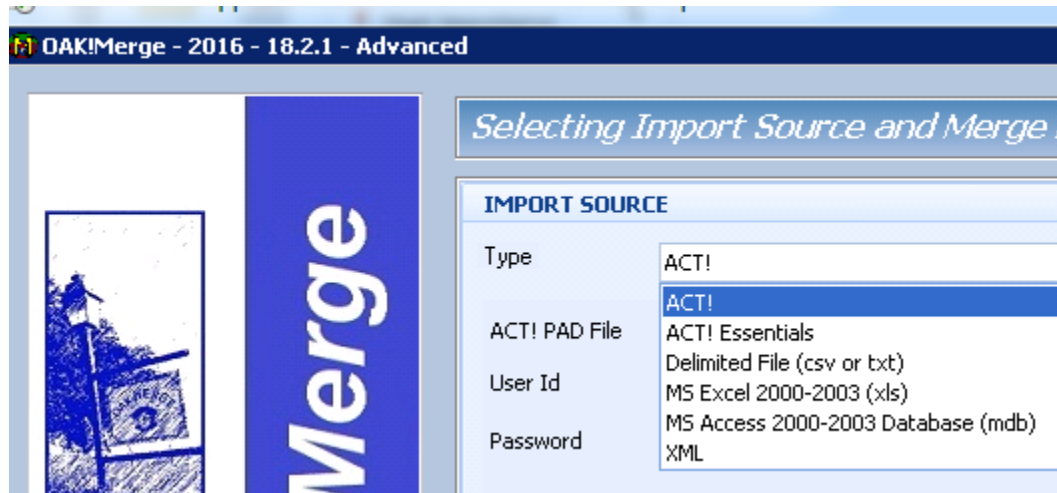


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



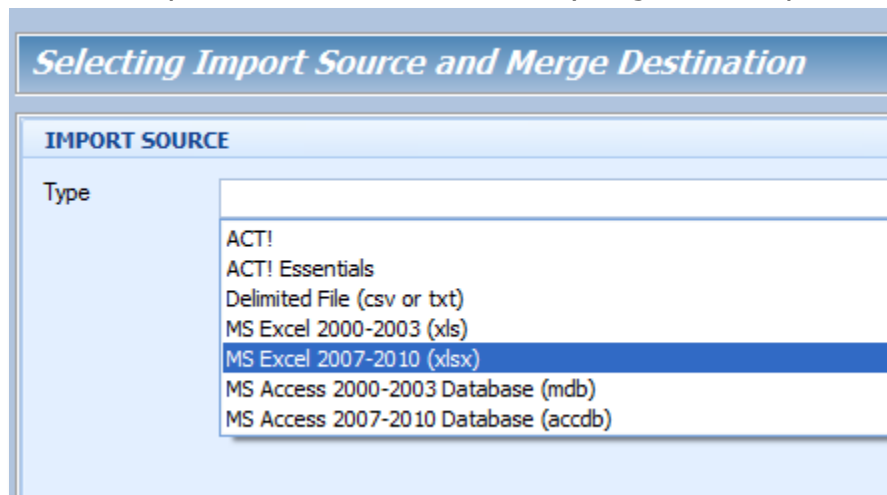


OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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)



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:

| 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_ |

When importing, one option for linking is the use the GUID
Linking Act! History to Contacts using GUID to GUID is show below:



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

| Merge Rules | | | | | | |
|-----------------------------------|---------------------|--|---|-----------|----------|---------------------|
| Act! Table | | History | | | | |
| Delimited File (csv or txt) Table | | CSV Table | | | | |
| | | <input type="checkbox"/> 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 |



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Linking Act! History to Contacts using the SOURCE database GUID to the OAKMergeID field in the TARGET database.

| Merge Rules | | | | | |
|-----------------------------------|-------------------------------------|--|-----------|----------|---------------------|
| Act! Table | | History | | | |
| Delimited File (csv or txt) Table | | CSV Table | | | |
| | | <input type="checkbox"/> 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 | | 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)



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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:



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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

Home About Us Product Info How To Order & Buy Support Downloads **Blog** Contact Us

Selecting Import Source and Merge Destination

IMPORT SOURCE

| Type | File | Delimiter |
|--|---|-----------------------------|
| Delimited File (csv or txt) | Act! Act! Web API Act! Essentials | 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



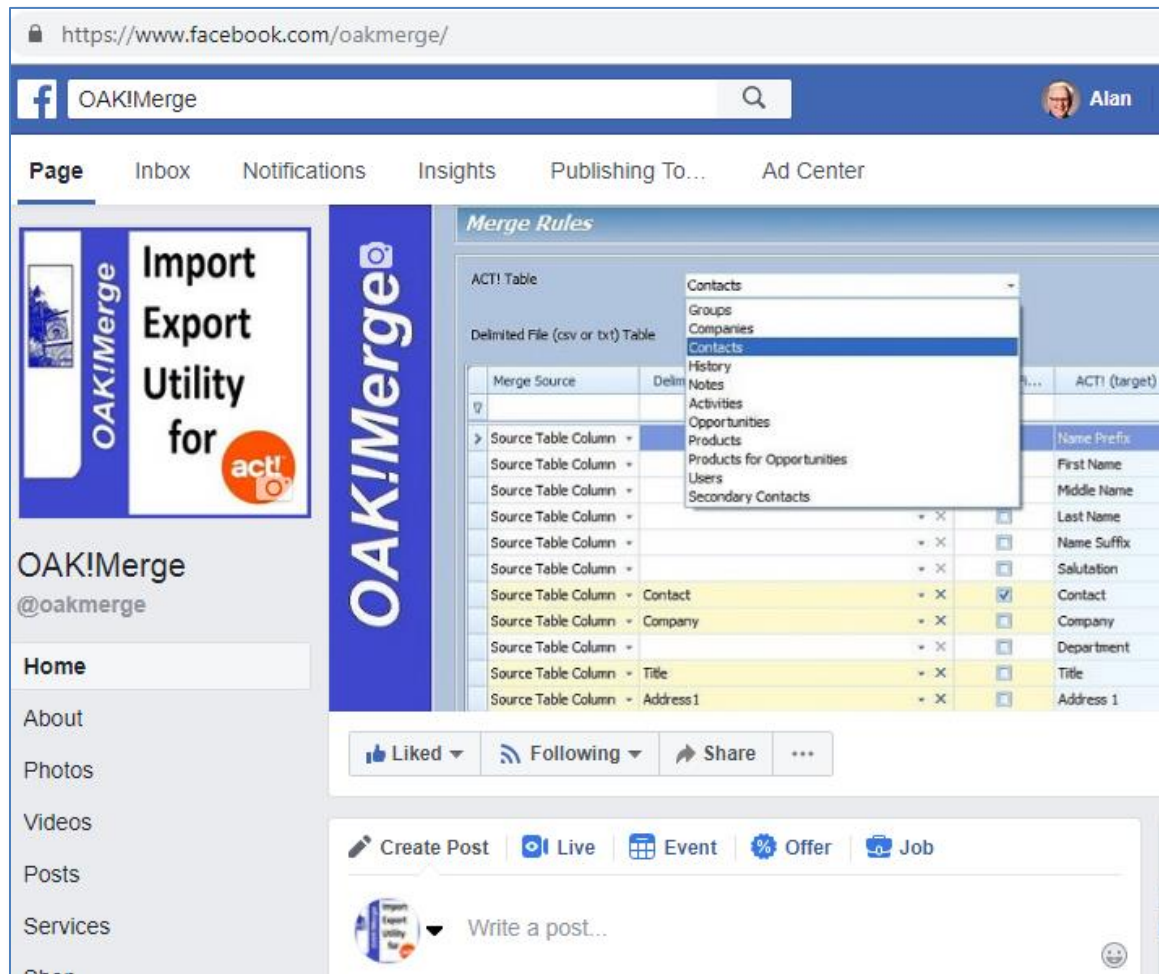
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Our Facebook page is at www.facebook.com/oakmerge/

Please "like" our page or leave a comment!





Appendix 12: Features Roadmap

Download the current version of this as a PDF at:
www.oakmerge.com/downloads/Oakmerge_Roadmap.pdf

[illegible]

Several Error and Warning messages can be displayed when leaving the mapping page.

There may be many fields in a source file. You do not have to map/use all of them. Some are required. That varies by which table you are working with and



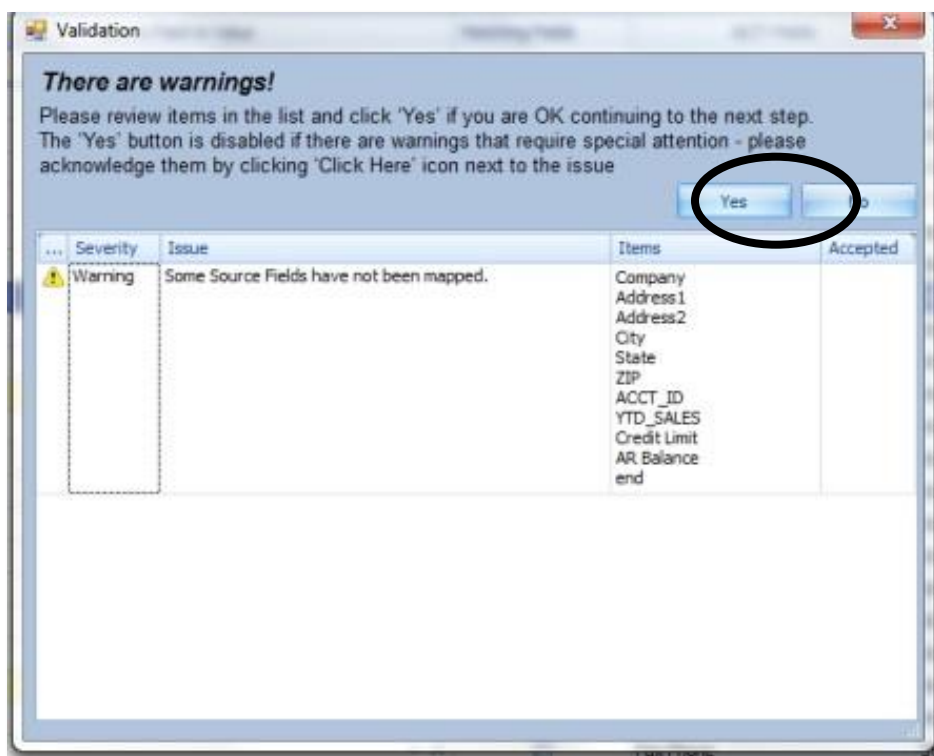
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Appendix 14: Software License, Subscription, Warranty, Terms and Conditions of use

ATTENTION: USE OF THE OAK!MERGE SOFTWARE IS SUBJECT TO THE ACCOMPANYING SOFTWARE LICENSE TERMS. USING THE SOFTWARE INDICATES YOUR ACCEPTANCE OF THESE LICENSE TERMS. IF YOU DO NOT ACCEPT THESE LICENSE TERMS, YOU MAY NOT INSTALL, USE, TRANSFER OR DISTRIBUTE THE SOFTWARE

The following License Terms govern your use of the OAK!Merge Software unless you have a separate signed agreement with E TECH SYSTEMS, INC IN SCHAUMBURG, IL USA (ETS)

IMPORTANT-READ CAREFULLY: This End-User License Agreement ("Agreement") is a legal contract between you, either (a) an individual user or (b) a business organization (in either case the "Licensee"), and ETS for the Software. By clicking on the downloading button, accessing or otherwise using the Software, Licensee agrees to be bound by the terms of this Agreement and Licensee represents that Licensee is authorized to enter into this Agreement on behalf of Licensee's corporate entity (if applicable). If Licensee is an individual entering into this Agreement on behalf of a company or other legal entity, Licensee represents that it has the authority to bind such entity and its Affiliates to these terms and conditions; if Licensee does not have such authority, or if Licensee does not wish to be bound by the terms of this Agreement, Licensee must not install, access or use the Software.

ETS AND SWIFTPAGE AND KQC MAKE NO WARRANTIES, EITHER EXPRESS OR IMPLIED, OF ANY KIND REGARDING THE ENCLOSED SOFTWARE, WHETHER ITS' MERCHANTABILITY OR ITS FITNESS FOR ANY PARTICULAR USE OR ANY OTHER WARRANTY.

Subscription License Grant. ETS grants you a license to use one copy of the Software during the term of an active paid subscription. At the end of the subscription period, no additional use is included. "Use" means storing, loading, installing, executing or displaying the Software. You may not modify the Software or disable any licensing or control features of the Software. The Software is licensed to be installed on one computer and used by one user at a time, but only if a current subscription is active. Subscriptions are available in yearly payments only. They are non cancelable. No refunds are available. The software runs in a free trial mode to allow users to test and verify it's use before purchasing.

Ownership. The Software is owned and copyrighted by ETS. Your license confers no title to, or ownership in the Software and is not a sale of any rights in the Software. ETS' third party suppliers may protect their rights in the event of any violation of these License Terms.

Privacy Policy

The Software does not share any data with ETS other than your activation info. You consent to the collection, processing and storage by ETS of your personal information in accordance with the terms of ETS Privacy Policy, which is available at www.OAKMerge.com You agree to comply with all applicable laws and regulations, and the terms of ETS Privacy Policy, with respect to any access, use and/or submission by you of any personal information in connection with purchase or support of the Software.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Copies and Adaptations. You may only make copies or adaptations of the Software for archival purposes or when copying or adaptation is an essential step in the authorized Use of the Software. You must reproduce all copyright notices in the original Software on all copies or adaptations. You may not copy the Software onto any public network.

No Disassembly or Decryption. You may not disassemble or decompile the Software unless ETS' prior written consent is obtained. In some jurisdictions, ETS' consent may not be required for limited disassembly or decompilation. Upon request, you will provide ETS with reasonably detailed information regarding any disassembly or decompilation. You may not decrypt the Software unless decryption is a necessary part of the operation of the Software.

Termination. ETS may terminate your license upon notice for failure to comply with any of these License Terms. Upon termination, you must immediately destroy the Software, together with all copies, adaptations and merged portions in any form.

U.S. Government Restricted Rights. The Software and Documentation have been developed entirely at private expense. They are delivered and licensed as "commercial computer software" as defined in DFARS 252.227-7013 (Oct 1988), DFARS 252.211-7015 (May 1991) or DFARS 252.227-7014 (Jun 1995), as a "commercial item" as defined in FAR 2.101(a), or as "Restricted computer software" as defined in FAR 52.227-19 (Jun 1987) (or any equivalent agency regulation or contract clause), whichever is applicable. You have only those rights provided for such Software and Documentation by the applicable FAR or DFARS clause or the HP standard software agreement for the product involved.

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



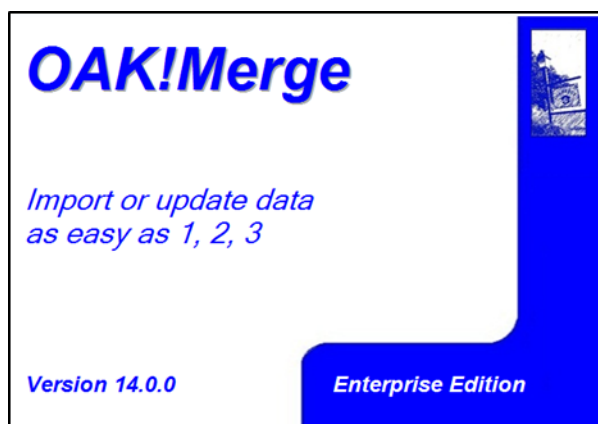
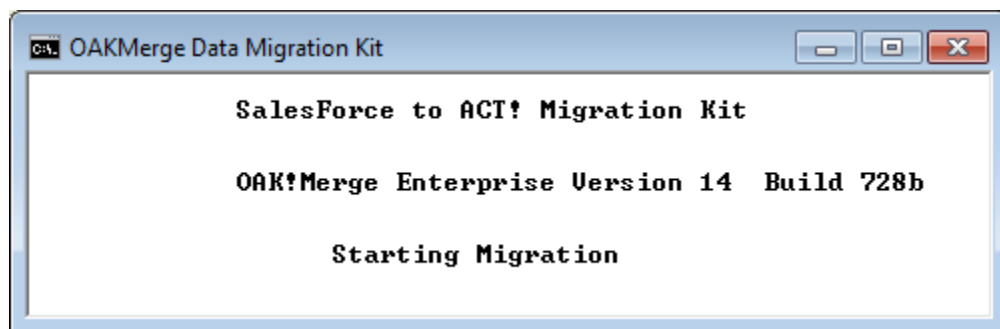
OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

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!



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

- 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.



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Index

\$

\$BLANK\$ · 145, 146, 147, 149
\$BLANK\$ Blank Date fields · 146
\$BLANK\$ Blank Numeric fields · 146
\$BLANK\$ Blank Text fields · 146
\$DATE\$ · 149, 163
\$DATETIME\$ · 149
\$GUID\$ · 149, 163
\$ROW\$ · 149, 163
\$TIME\$ · 149
\$USER\$ · 149, 163

—
__GROUPS__ · 163

A

ACCDB option is missing · 21
ACCESS · 7, 19, 24, 95, 96
Access accdb · 200
Act! to Act! · 132
Activation · 8, 180, 181, 182, 183
Activities Merge · 97, 100
Activity Types
 Know Good · 49
Allow users to edit items in this list · 198
Annual Event · 198
Application Story · 202, 207
ASCCII · 195
Attachments · 60
Attachments to the Documents Tab · 54
Attachments to the History Tab · 53

B

Batch File · 125, 126
blank Contact Names · 28, 213
Both HTML and RTF to Plain Text · 143

C

Calculated Field · 198
cancel · 79
Cancel a merge · 39
Change Mode · 158
Character Fields · 196
Checkboxes · 197
Complete Run · 34, 77, 101
CompnayID · 157
Constant · 64, 76, 140, 146, 147, 162
Contact Fields · 9
ContactID · 157
Copy Down button · 158
Copy Up button · 22, 158
corruption · 195
Create Contacts from Companies · 202
Currency and Number Fields · 197

D

Data Types · 195
Date Fields · 197
Date/Time Fields · 197
Decimal Fields · 197
De-Dupe · 29
Delete · 132
Delete History · 174
Delete Notes · 179
Delimiter · 19
Division · 150
Documents Tab · 62
Documents Tab · 53, 58
Duplicate Rows · 65
Duplicates · 29

E

Enterprise Edition · 215
Errors and Warnings · 33, 76, 78, 90, 128
EXCEL · 7, 19, 20, 24, 43, 78, 192, 193



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Excel xlsx · 200
Execution Logging Level · 127
Export all tables · 158
Export Contacts · 158
Export Group Name · 166
Export History · 158
Export Notes · 158
Exporting · 2, 25, 157, 158, 165
Exporting Attachments and Documents · 63

F

Facebook · 211
Features Roadmap · 212
Field names changed · 186
File · 15, 19, 82, 100
Filtered Export · 166
Filtered Import · 169
Filtered Import Group · 169
First Name · 187
First Row Field Names · 25, 26
Formattig Data · 195
FTP · 191

G

Group Assignment · 63
Group Membership List Export · 163
GroupID · 157
GUID · 114
GUID · 32, 95
GUID · 149
GUID · 152
GUID · 157
GUID · 157
GUID · 163
GUID · 163

H

Hierarchy · 150, 154
History · 2, 6, 7, 44, 55, 120, 174
 Attachments · 54
History - Export · 158
HTML to Plain Text · 143
HTTP · 191
HTTPS · 191

I

Import Source Files · 11, 15, 27, 109
Importing and Exporting Attachments · 157
Importing and Exporting Documents · 157
Initial Caps Fields · 196
Input File · 11, 19
Inserting a blank contact · 6, 27, 187

K

Keywords · 149, 162

L

Last Name · 187
License · 214
Link Attachments · 62
Linking · 11, 31, 116, 120, 121, 144
Log Files · 34, 38, 43, 126, 131, 185, 191
Logging Level Switch · 128
Logs · 161
Lower Case · 139, 142

M

Map Fields · 22
Mapping · 27, 36, 76, 121, 209
Mappings Information · 36
Matching · 11, 28, 29, 65, 144
Matching Rules · 29
Matching vs. Linking · 11, 144
MDB or ACCDB option · 21
Memo Fields · 197
Menus · 198
Merge Destination · 15, 18, 109
Merge Multi-line text into a single line · 144
Merges · 7, 11, 14, 31, 36, 96, 97, 112, 130
Microsoft Office drivers · 95, 200
Multi Pick Select · 198

N

Note-link to a contact · 66
Note-link to multiple contacts · 69
Notes · 2, 7, 66



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Notes- Export · 158, 159
Number of Rows to Skip · 35

O

OAKMerge_Export · 166
OAKMerge_Export – Filtered Export · 168
OAKMerge_Export – Group Name · 167
OAKMerge_Import · 169
OAKMerge_Import – Filtered Import · 169
OAKMergeID · 32, 56, 69, 76, 83, 86, 116,
117, 119, 121, 123, 124
OAKMergeID · 152
OpportunityID · 157
Out of Memory · 207
out of memory error · 162

P

Password · 19, 96, 112, 181
Phone Fields · 197
Pick List · 198
Picture · 198
Prefix · 6, 187, 188
Product · 2, 82
Profile · 2, 36
Profile Information · 36
Profile Information · 209
Profiles-Creating · 125, 126
Profiles-Running · 10, 125
progress bar · 79
Progress bars · 39
Proper Case · 139, 142
Public / Limited Access lists · 198
Pull down menus · 198

Q

Quantity · 82

R

recurring activities · 104
Remove CR/LF · 139
Reserved Key Words · 139
Review Merge Results · 40
RTF to Plain Text · 142, 162

Run · 2, 14, 34, 77, 101, 110, 127, 130
Run multiple instances of OAK!Merge · 9
Run Via Scheduler · 124, 125

S

SalesForce Data Migration Kit · 215
Samples · 16, 55, 63, 66, 113, 130, 193
Scheduled For/Scheduled By · 98, 102, 103
Secondary Contact · 7, 108, 109
Shortcuts · 53, 59, 60
Simple Opportunity · 73
SKIP · 35
Slow Exports · 165
SOFTWARE LICENSE · 214
Some fields have not been mapped · 33,
213
Source · 2, 15, 18, 27, 82, 96, 100
Source column names · 186
Source Field · 27
Source Files · 2
Sub Groups · 154
Subscription · 214
Substitute a . · 145
Substitute a ~~~ · 145
Substitute a blank for a field that is a ~~~
· 146
Substitute a blank for a field that is blank
or a space · 146
Suffix · 6, 187, 188
Support Blog · 209
Swap button · 158

T

Target Files · 2
Target Table · 22
Test Run · 34
Time Fields · 197
timers · 39
TIP · 6, 22, 27, 28, 29, 31, 34, 35, 37, 38,
42, 43, 47, 52, 64, 69, 81, 84, 86, 95, 96,
98, 102, 103, 127, 128, 131, 133, 134,
135, 143, 145, 148, 152, 155, 158, 160,
162, 186, 192, 209
Transform HTML · 139
Transform to a GUID · 139
Transformation Definitions · 140
Transformations · 139, 145
Trim · 142



OAK!Merge User's Guide



Act! Version 25.1.1 Revised 6/1/23

Truncate Multi-line text to the first line ·
144
Type · 19

U

Unattended Mode · 2, 124
UNC · 190
Unicode · 195
Updates and Upgrades · 209
Upper Case · 139, 141
URL · 190
URL Fields · 198
URL Attachments · 62
URL Links · 53, 60
User ID · 19, 96
UTF7 · 195
UTF8 · 195

V

Validate Execution · 34, 38, 110
Validation dialog box · 33, 78

W

warning · 33, 78
Warranty · 214

X

XML – how to export in XML format · 170
XML format as a Source · 170

Y

Yes/No Fields · 197