



# MergeAdmin™ by ASDS Computer User's Guide

# MergeAdmin™ by ASDS Computer **User's Guide**

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## **WELCOME TO MERGEADMIN**

This user's guide was designed to help you become familiar with the features and functions of MergeAdmin. MergeAdmin is the most powerful tool of its kind for use with ACT! 2005/2006. Use it to merge and import data from any ASCII data file into an ACT! database on a field-by-field level, allowing you to keep your ACT! data updated with useful information from other sources.

## **SYSTEM REQUIREMENTS**

- Computer with a Pentium III or better processor
- Microsoft Windows 2000, XP or 2003
- ACT! 2005/2006 Standard or Premium on the same PC network workstation or network server

ASDS COMPUTER

10343 Federal Blvd., PMB J404, Denver, CO 80260


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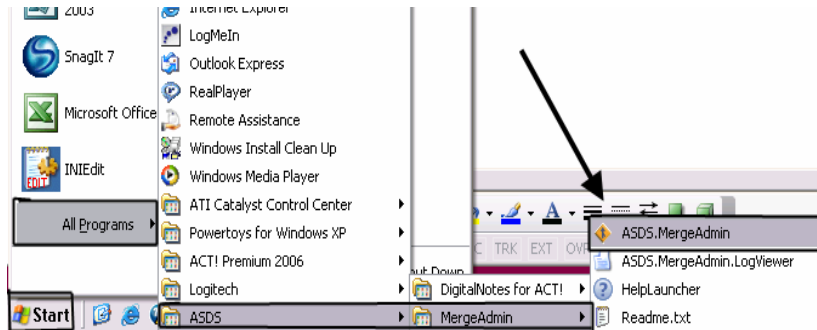
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# Using MergeAdmin

## Getting Started

MergeAdmin is an easy to use, wizard-based application. To begin using MergeAdmin, launch the program by clicking on the  icon located on your ACT! toolbar, or by going to:

START>ALL PROGRAMS>ASDS>MergeAdmin>ASDS.MergeAdmin




**Figure 0-1: Starting MergeAdmin**

It is not necessary to have ACT! running to use MergeAdmin. You will need to know the locations of both your target ACT! database(s) and files used for the import.


# Using MergeAdmin

## Step 1: Setup

### ACT! Database:

We begin by selecting the target ACT! database. This is the database in which you wish to merge either your .csv or delimited file data into. You will need to provide the Username and Password for the target database to continue. The items marked with  are required items that must be selected.

### Source Data:

This portion of Step 1 deals with the input file for your merge. First, browse to the location of your source file by clicking on the  button. Next, select the file delimiter: tab, comma separated value (.csv), etc.

If applicable, check the box for 'First row contains column names.' Check your information for accuracy and click Next.

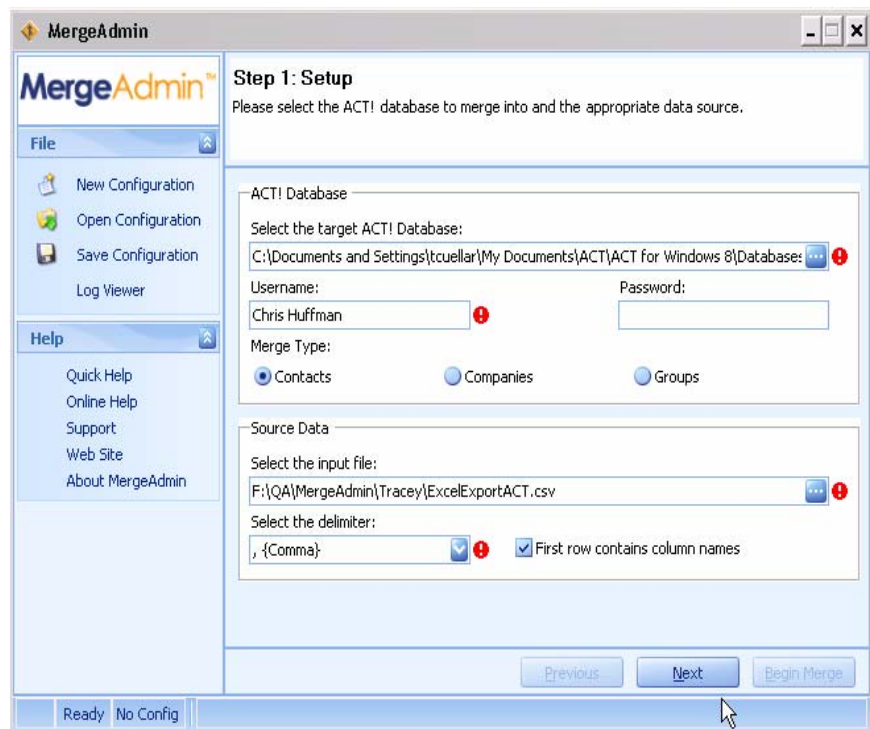


Figure 1-1: Completed Setup Screen

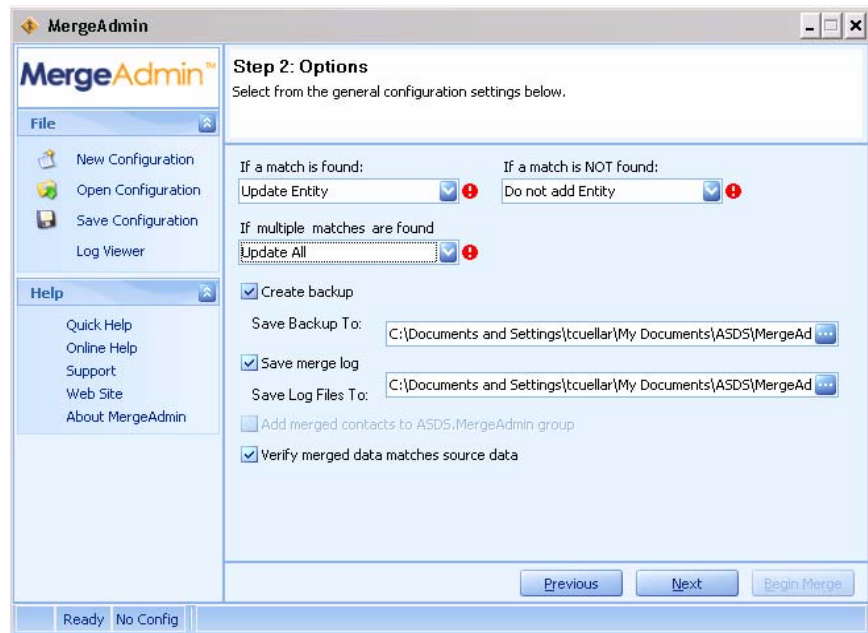
After clicking 'Next,' MergeAdmin will validate the target database Username and Password and then move to the next screen.

**NOTE:** If you wish to run a previously saved configuration file, open it now. For more information regarding the use of configuration files, see page 15.

# Using MergeAdmin

## Step 2: Options

The next step in the process is to fill out your options for the merge process. These options will direct MergeAdmin on how to handle the imported data when it finds a match.



**Figure 2-1: Completed Options Screen**

Each matching option determines the data input when a source contact matches, does not match, or when MergeAdmin finds multiple matches of a contact in your database. Each has a drop-down menu containing the following choices:

**Add Contact** - This option adds the source contact as a new contact record in ACT!.

**Prompt for Action** - This option prompts you to make a choice during the import process.

**Skip Contact** - This option skips the contact entirely and nothing will be written to the contact in your database.


**Update Contact** - This option updates the contact in your database with the fields you map on the following wizard screen.

# Using MergeAdmin


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**Create Backup:** It is strongly recommended you check this option. This will ensure the ability to return your database to the state it was in prior to the execution of your import.

**NOTE:** You will need to use the MergeAdmin LogViewer to see the errors. To learn about the LogViewer, see the MergeAdmin LogViewer Help Topic.

**Save Backup to:** MergeAdmin will automatically display a default location for your backup which may be edited by clicking  to browse to your desired location, or simply type your path in the field.

**Save Merge Log:** Checking this option will create a text file containing any errors that might have occurred during the merge process.

**Save log files to:** MergeAdmin will automatically display a default location for your log files. This may be edited by clicking  to browse to your desired location, or simply typing your path in the field.

**Add merged contacts to ASDS.MergeAdmin group:** Checking this option will add all of your newly merged contacts into this new group created by MergeAdmin.

**NOTE:** History for field level changes is **only** available via ACT!'s field level history option. This is not part of MergeAdmin.

**Verify merged data matches source data:** This will enable data validation by MergeAdmin. Please be aware this option will lengthen the processing time of your merge.

Click the **Next** button to continue to the next screen in the wizard.

# Using MergeAdmin

## Step 3: Source Field Definitions

This step is used to correctly determine each source field's data type. On this screen you see each 'Column Name' from your source file and the corresponding 'Data Type' for each. The default is 'Character' for all columns.

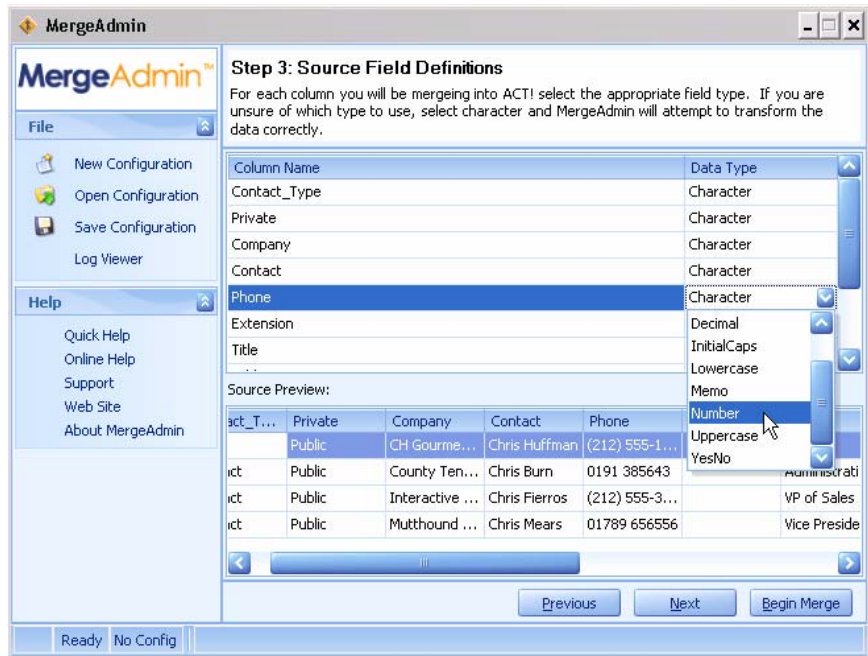


Figure 3-1: Source Field Definitions Screen

➔ It is highly recommended that you choose the correct data type for each of your source fields to ensure a smooth transfer of data. Below is a list of available data type options and their definitions:

**Character** - This is the default type. Most source data types will map correctly if you accept this choice.

**Initial Caps** - This would take "ACE PLUMBING" and convert it to "Ace Plumbing."

**Lower Case** - This would take either "ACE PLUMBING" or "Ace Plumbing" and convert it to "ace plumbing."

**Uppercase** - This would take "Ace Plumbing" and convert it to "ACE PLUMBING."

**Currency** - This would take "230.45" and it would convert it to a currency field in ACT!.

**NOTE:** In order to ensure that your phone numbers get merged into ACT! correctly, your phone number formatting should follow TAPI Canonical address format for phone numbers. For example, this is how you would enter a number for a subscriber in the United States of America in canonical address format: "+1(425) 555-0100"

For more information on TAPI Canonical phone number formatting, please visit Microsoft's TechNet Website that addresses this topic by clicking [here](#).



# Using MergeAdmin

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**Decimal** - This would take "0.45" and it would convert it to decimal field in ACT!.

**Memo** - This would take lengthy text and would convert it to a memo field in ACT!.

**Number** - This would take "45" and would convert it to a number field in ACT!.

**YesNo** - This would take values like "True" or "False" and convert it to a YesNo field in ACT!.

**NOTE:** Only the first 10 records of your source file will be shown here.



**Source Preview:** This is a sample of the live data contained in your source file. This preview allows you to correctly determine your data type without having to leave the MergeAdmin wizard.

# Using MergeAdmin

## Step 4: Match Criteria

The next step in the process is selecting the matching criteria between the contacts in the ACT! database and the source file. The settings you choose on this screen will be used to locate the correct record to update.

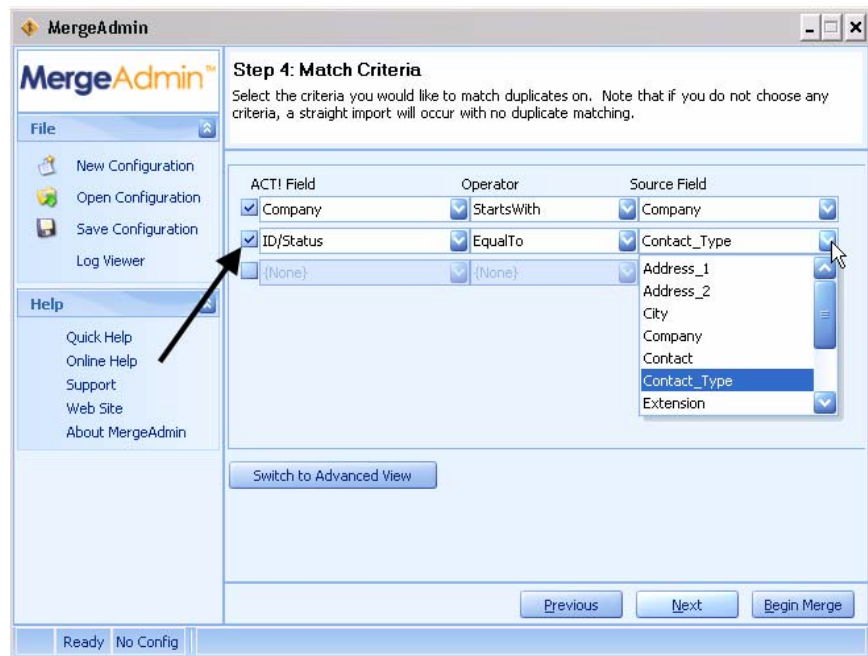


Figure 4-1: Completed Match Criteria Screen

Check the box next to each line you want to make active. Then make your selections. You are able to continue with no matching criteria, or with 1, 2, or 3 fields to match on.

**Switch to Advanced View:** This view allows you to use query-based logic to find your matching criteria. This system is modeled after the ACT! query builder system. If you wish to switch back to the basic view, you can do so by clicking the button that is labeled 'Switch to basic view.'

Click the 'Next' button to continue on to the next screen in the wizard.

# Using MergeAdmin

## Step 5: Map Fields

This is the final step of the wizard. On this screen you will map the fields from the source file to the fields that already exist in your ACT! database.

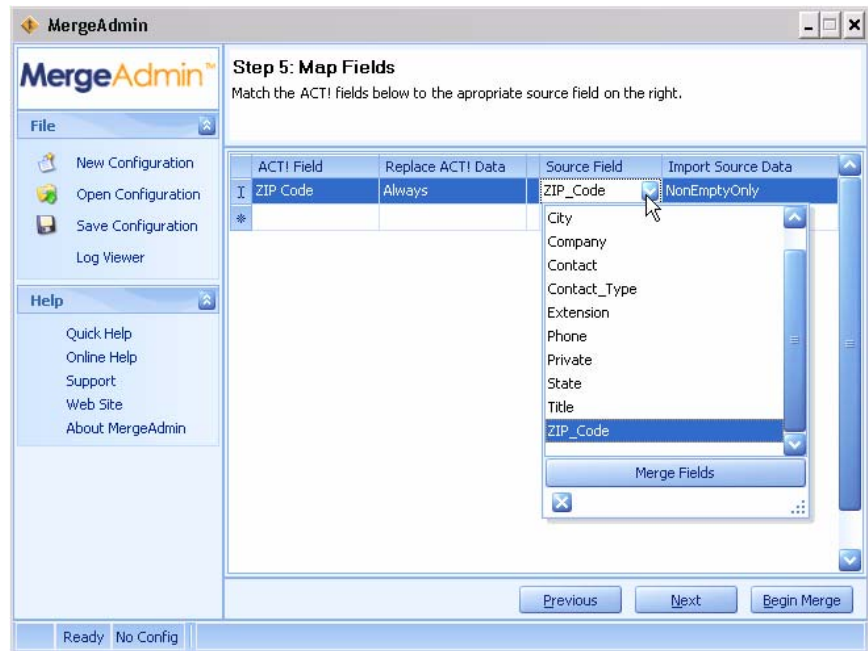



Figure 5-1: Map Fields Screen

Click the  button next to the source field to begin.

**Replace ACT! Data / Import Source Data:** Here you can choose to either 'Always' merge the data over the existing data, or you can choose 'NonEmptyOnly' if you only want to import into ACT! fields which do not currently contain data.

**Adding a New ACT! Field:** To add a new field to ACT! while you are mapping you can click the drop down for 'ACT! Field' and at the bottom of this drop down you can choose the 'New Field' button.

**Merge Fields:** When clicking the drop down for the 'Source Field,' you have an option at the bottom to Merge. This option allows for merging multiple fields from your import file to a single ACT! field.

By pressing this button you will be presented with the 'Merge Remote Fields' dialog box. Here you will choose the

# Using MergeAdmin

fields from the import file and what you would like to use to separate the data.

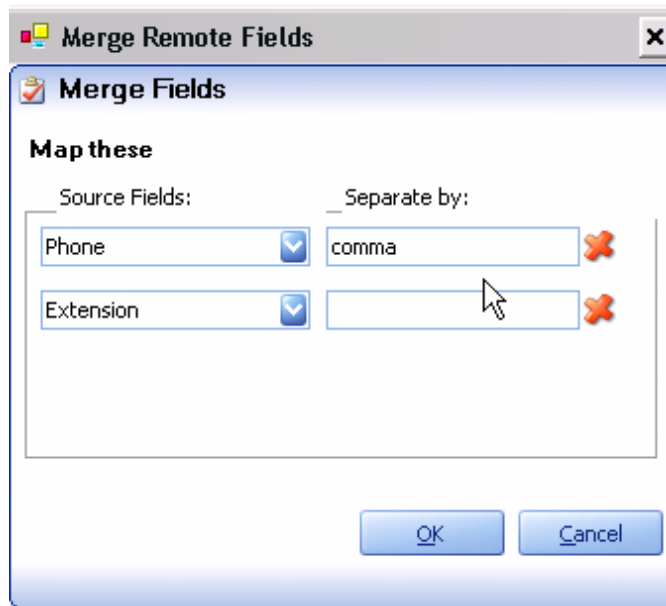


Figure 5-2: Merge Multiple Data Fields to a single ACT! Field

# Using MergeAdmin

## Step 6: Summary

On this screen you will have the opportunity to review your options before executing your import by clicking 'Begin Merge.' You can scroll back to an earlier step to change options by clicking 'Previous' until you reach your desired screen.

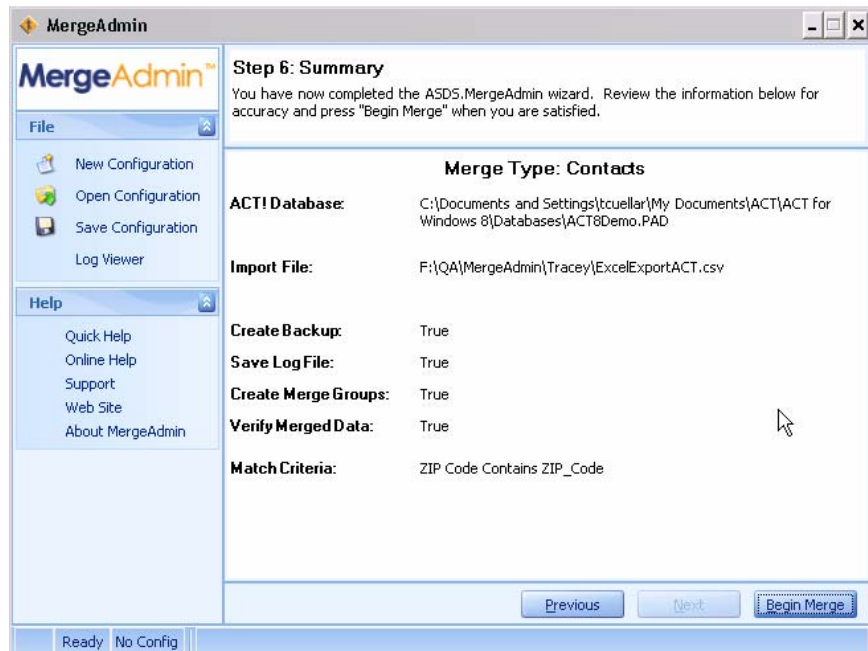


Figure 6-1: Summary Screen

After you have verified your information, click 'Begin Merge.'

Next, you will see the following message:

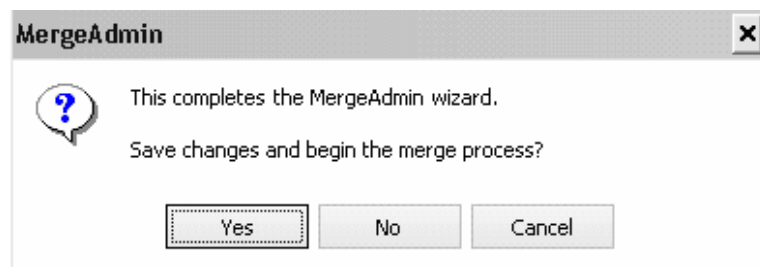
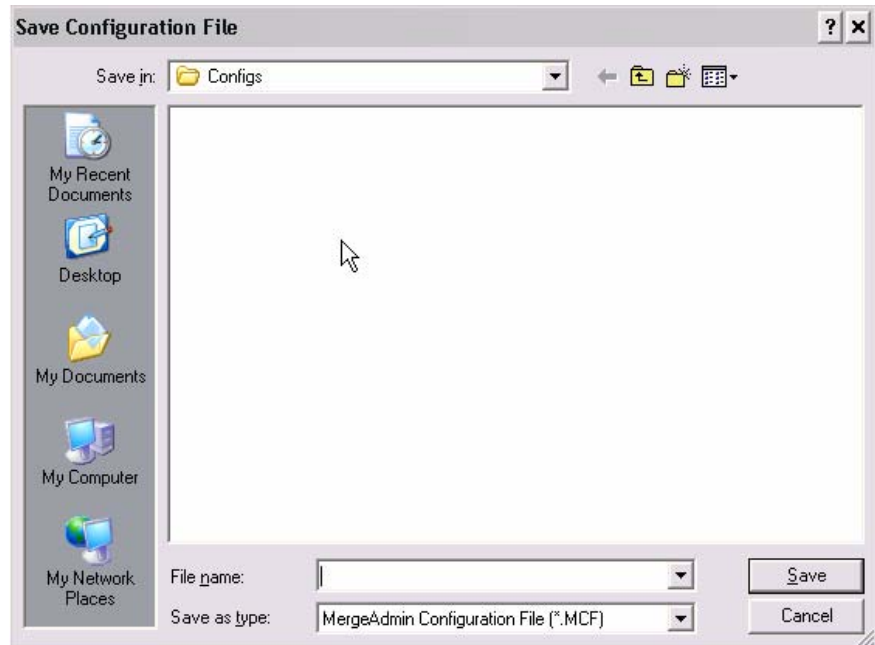


Figure 6-2: Save Configuration Prompt

**Yes:** Click 'Yes' to save your merge as a configuration file to be used again at a later date. You will see the 'Save Configuration File' window in Figure 6-3. Choose the location to save your file to.

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**No:** Click 'No' if you do not want to save the current configuration and wish to begin merging records.

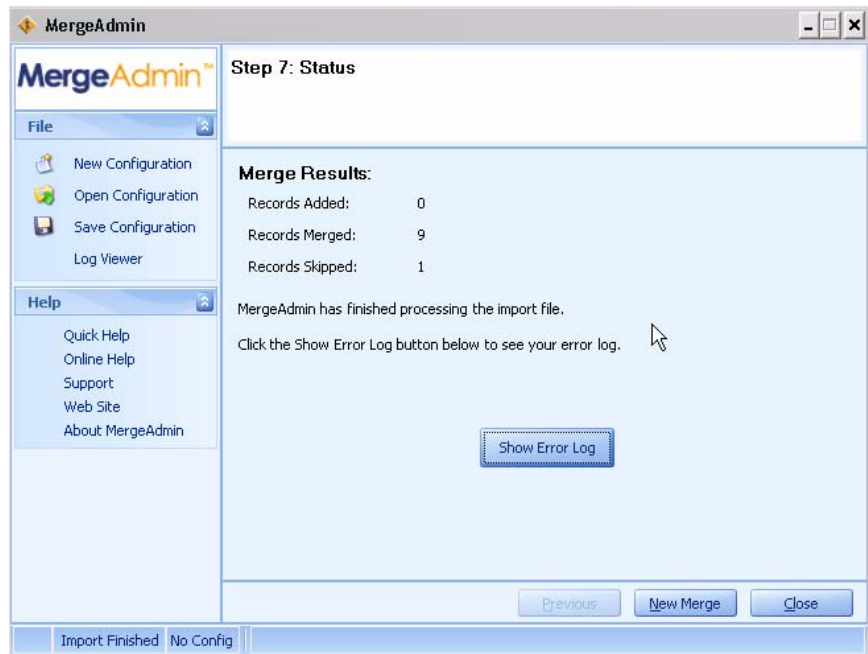


**Figure 6-3: Save Configuration Dialog**

# Using MergeAdmin

## Step 7: Status

When your import has completed, the following screen will appear to give your merge results.



**Figure 7-1: Status Screen**

**Show Error Log:** Clicking on this option will open the LogViewer. This will show you a list of any errors that might have occurred. From the LogViewer, you can edit and re-import individual lines of data without performing a whole new merge.

# Using MergeAdmin

## How to use the MergeAdmin LogViewer

The MergeAdmin LogViewer is the tool that is used to see the error logs that are created if you enabled this option in Step 2. In addition, the LogViewer will allow you to make changes to any data that may have failed and re-export just the fixed data to a new file. You can then re-import this fixed file rather than re-importing your entire original data set.

You can launch the LogViewer from START > ALL PROGRAMS > ASDS > MERGEADMIN > ASDS.MergeAdmin.LogViewer. You can also click 'LogViewer' from the 'File' area on the MergeAdmin program window. Once the MergeAdmin LogViewer is launched, go to FILE > OPEN and browse to the location you saved your log files to.

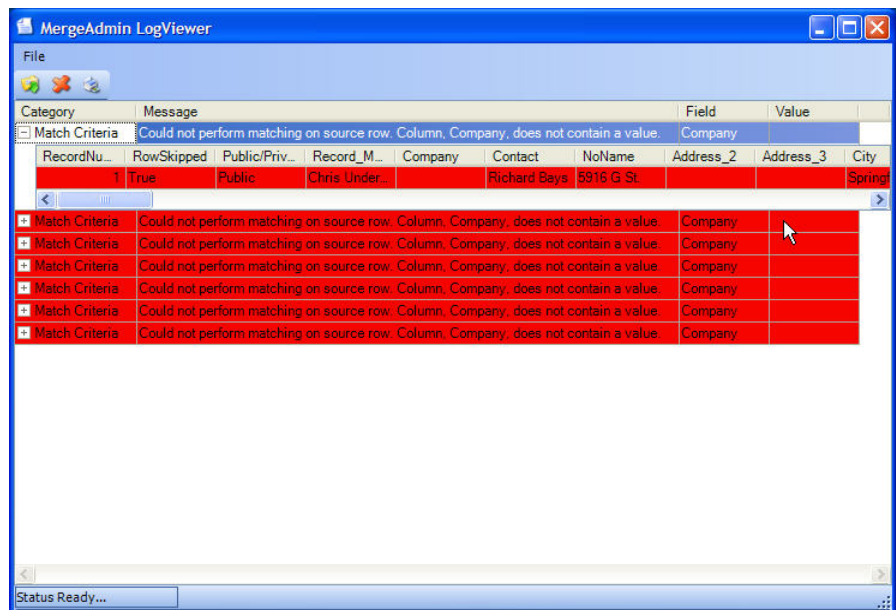


Figure 8-1: LogViewer Screen

In Figure 8-1, companies were mapped to ACT! from the source file, but the entities above did not contain a company name. Therefore, they were excluded from the merge process.



# Using MergeAdmin

As shown in Figure 8-2, you can enter a company name on these records right from the LogViewer, and then re-export those back out as a new source file by going to FILE > EXPORT SKIPPED ROWS.

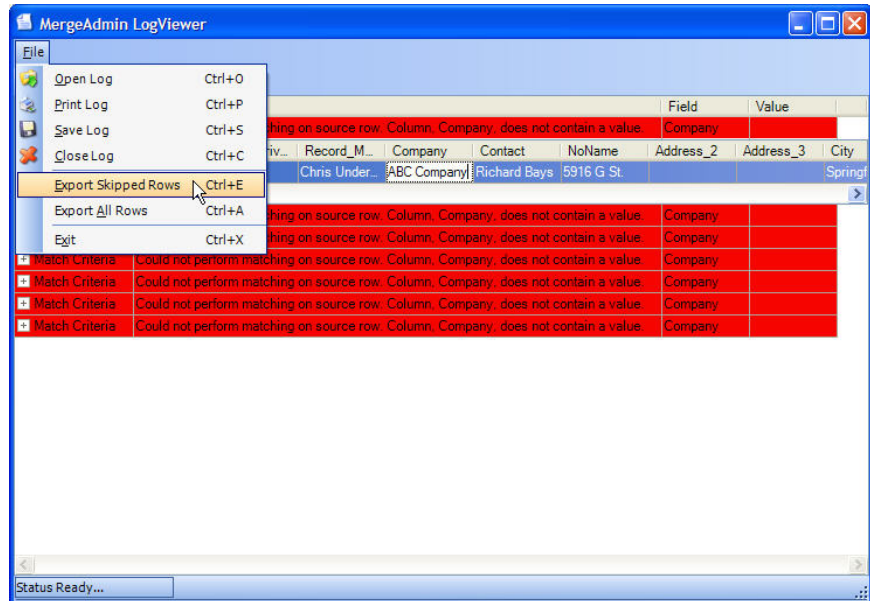


Figure 8-2: LogViewer Export

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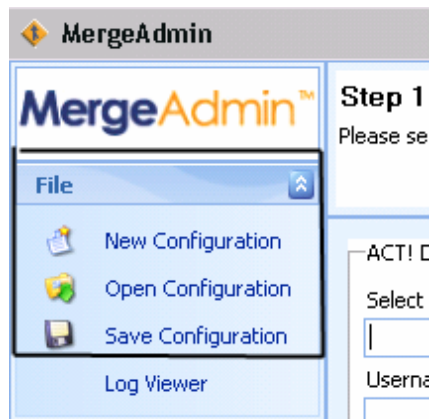
## Configuration Files

Configuration files are used to store previously saved settings such as database info, mapping details, etc. If you are importing files from the same source on a regular basis, you can speed up the merge process by saving your configurations. This eliminates having to repeatedly fill out the database information, source file locations, etc. To use configuration files, use the steps below:

Go through the MergeAdmin wizard and fill out the fields accordingly.

Click 'Save Configuration' from the 'File' area on the left hand side of the window.

Give your configuration file a name and click the 'Save' button.



**Figure 9-1: Configuration Management Commands**

# Using MergeAdmin

## Prompt for Action

Here is an example of the 'Prompt for Action' dialog box when the source entity already exists in your ACT! database. You have the following options:

To update the ACT! entity, select the row that matches the source record and click the 'Update' button.

To add the source entity, disregarding the match criteria, click the 'Add' button.

To skip the source entity, disregarding the match criteria, click the 'Skip' button.



Figure 10-1: Prompt for Action Screen

# Using MergeAdmin

## Select Contacts Dialog

Here is an example of the 'Select Contact' dialog box. At the top of this box is the source record from your import file. The list below will show you the records in your ACT! database that match your selected criteria.

To update the ACT! contact, select the row that matches the source record and click the '**Update**' button.

To add the source contact, disregarding the match criteria, click the '**Add**' button.

To skip the source contact, disregarding the match criteria, click the '**Skip**' button.

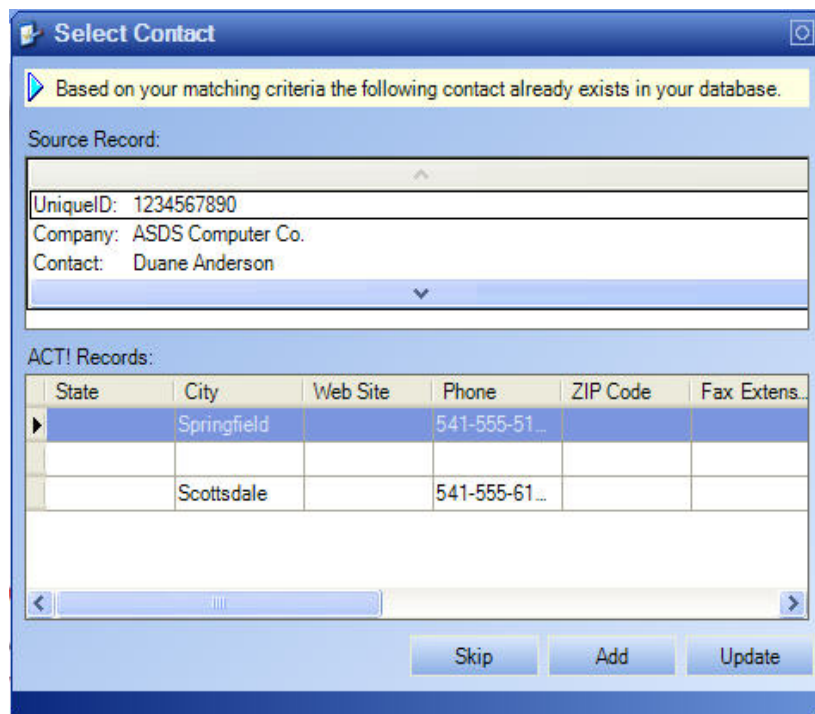


Figure 11-1: Select Contacts Screen

# Using MergeAdmin

## Frequently Asked Questions

**Question:** Nothing happens when trying to create a new configuration file.

**Answer:** This will be the case when you have not loaded a previous configuration file first. If the fields in the wizard are already blank, you are already on a new configuration. If you have a configuration loaded and the fields are filled out, going to File > New Configuration should blank them out to allow you to create a new one. You would then go to File > Save Configuration once you have completed the wizard.

**Question:** What if I need to reinstall, will I have to re-register?

**Answer:** You should not need to re-register the software as long as you have **not** deleted the program directory. Your registration is saved even after an uninstall. However, if you manually delete the program directory or do a reformat of your machine, the registration will be lost and you will need to contact us for a replacement registration.

**NOTE:** MigrateAdmin (another great product from ASDS Computer) will import GoldMine® database files into ACT!

**Question:** Can MergeAdmin import database files?

➔ **Answer:** Unfortunately, it does **not** merge database files at this time, only delimited files. If you can get your database into a delimited file format, you could then use MergeAdmin to bring that data into ACT!.

**Question:** Can MergeAdmin run automatically by adding it to Scheduled Tasks?

**Answer:** At this time, MergeAdmin can not be run automatically. Scheduled Tasks could start the program, but there is not an automated way to have it start the merge.

**Question:** How do I get the latest version of MergeAdmin?

**Answer:** You can download the update from the URL below. You no longer need to uninstall the product prior to installing the update.

➔ <http://www.asdscomputer.com/redirects/mergeupdate.htm>

**NOTE FOR WINDOWS XP SP2 USERS:**  
You will see the following message when you click the link to the right. "To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options." Once you click on the message, you will be able to proceed with the download.

## Contact Us

We offer several services to meet your technical support needs. Technical Support is available by visiting the ASDS Computer web site at:

<http://www.asdscomputer.com/support/>

Please visit us today!

## Other Add-Ons by ASDS Computer

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**DigitalNotes™** – The only system that gets handwritten notes into ACT! 2005/2006

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**FaxAdmin™** – Fax from ACT! 2005/2006 using WinFax® PRO or Microsoft® Fax

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**MigrateAdmin™** - Convert GoldMine® data directly into ACT! 2005/2006

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