

# MergeAdmin™

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**MergeAdmin™ by KEYSTROKE****User's Guide****COPYRIGHT NOTICE**

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# Welcome to MergeAdmin™

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## **MergeAdmin™ by KEYSTROKE**

### **MergeAdmin merges and imports data from any ASCII data file into an ACT! database on a field-by-field level**

MergeAdmin merges and imports data from any ASCII data file into an ACT! database on a field-by-field level so you can keep your ACT! data updated with helpful information from other sources. You determine how to match contacts and which fields to update – all other fields remain intact.

Take that valuable customer data from around your company and bring it into specific ACT! fields for each contact – without custom programming. MergeAdmin updates just the ACT! fields you choose, such as year-to-date sales data, last products purchased, new customer records, data from web info requests, downloads from the corporate mainframe, billing and credit information from accounting, and more.

# **System Requirements**

## **ACT! Minimum System Requirements**

Client Installation:

- ◆ MergeAdmin adheres to the Act! system requirements for your version.

## **MergeAdmin Requirements**

- ◆ ACT! v18 or higher PRO or Premium

# Using MergeAdmin

## Getting Started

MergeAdmin is a wizard-based application. In order to start using MergeAdmin, you will launch the program by going to **START > PROGRAMS > KEYSTROKE > MergeAdmin**.

**NOTE:** *Help is available throughout the process by clicking the "Quick Help" link on the left-hand side of the MergeAdmin program window. This will bring up help topics associated with the current wizard step you are on.*

Upon starting MergeAdmin, you will see a prompt with notification of how MergeAdmin handles field histories.

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



Once you click **OK** to this prompt, you will be taken to MergeAdmin as seen below:

The screenshot shows the MergeAdmin application window titled "MergeAdmin". The window has a menu bar with "File" and "Help". The "File" menu is expanded, showing options: "New Configuration", "Open Configuration", "Save Configuration", and "Log Viewer". The "Help" menu is also expanded, showing options: "Quick Help", "Online Help", "Support", "Web Site", and "About MergeAdmin". The main area of the window is titled "Step 1: Setup" and contains the following fields and controls:

- ACT! Database**
  - Select the target ACT! Database: [Text field with browse button and error icon]
  - Username: [Text field with error icon]
  - Password: [Text field]
- Merge Type:**
  - ☒ Contacts
  - ☐ Companies
  - ☐ Groups
- Source Data**
  - Select the input file: [Text field with browse button and error icon]
  - Select the delimiter:
    - [Dropdown menu showing ", {Comma}" with error icon]
    - ☒ First row contains column names

At the bottom of the main area are three buttons: "Previous", "Next", and "Begin Merge". The status bar at the bottom of the window shows "Ready" and "No Config".

**NOTE:** If you have previously saved a configuration file, you can open this by clicking "Open Configuration" from the File drop-down on the left-hand side. For more information on configuration files, see the configuration file help topic.

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

# Step 1. Setup

## Select the target ACT! Database

You will start the process by selecting which ACT! database you will merge your file into. In addition, you will need to provide the Username and Password for the database in order to continue.

## Merge Type

From this screen, you will also have the opportunity to select which type of merge you will be performing. Depending on which radio button is selected, this is where the imported data will be merged into ACT!.

## Source Data



Below is an example of a completed setup screen:

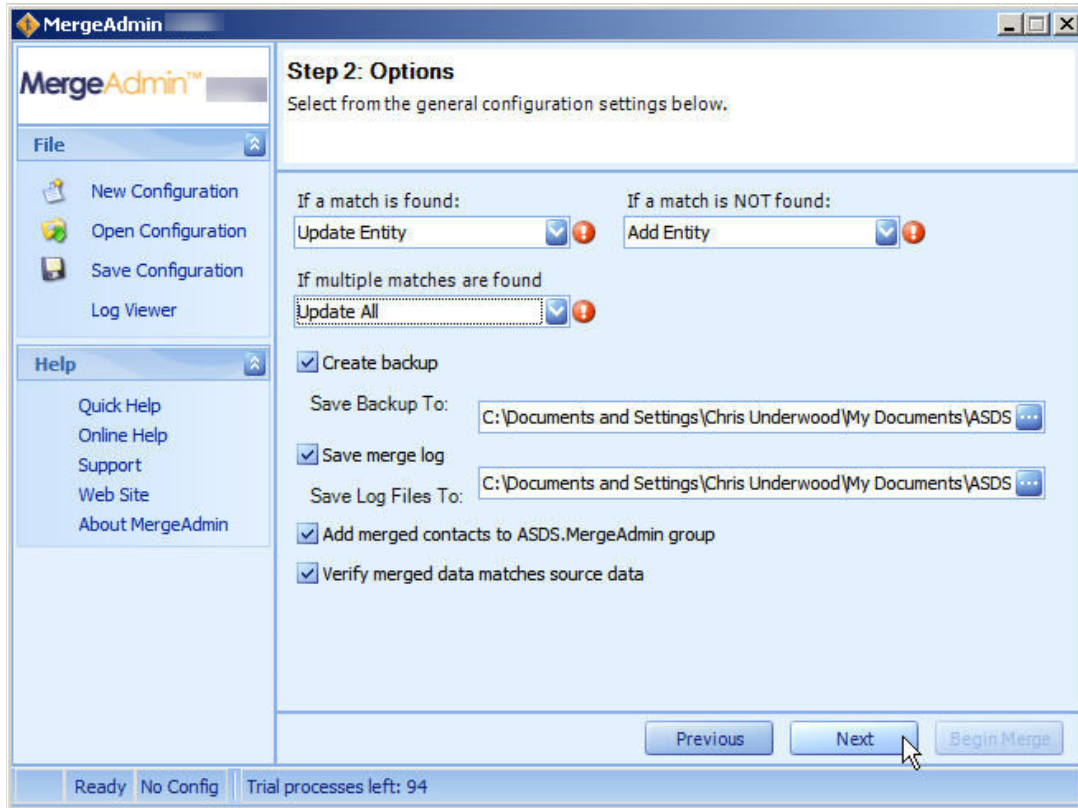
Click the **Next** button to continue to the next screen in the wizard or click **Begin Merge** to start the merge process.



## Step 2. Options



Below is an example of the options screen filled out. For information on each item, see below.



**"If a match is found":** This option sets what happens when a source contact matches a contact in your database. Here are your choices:

- Add Entity: This option adds the source entity as a new entity in ACT!.
- Prompt for Action: This option prompts you to make a choice during the import process.
- Skip Entity: This option skips the entity entirely, and nothing will be written to the entity in your database.
- Update Entity: This option updates the entity in your database with the fields you map.

**"If a match is NOT found":** This option sets what happens when a source contact does not match a contact you have in your ACT! database. Here are your choices:

- Add Entity: This option adds the source entity as a new entity in ACT!.
- Do not add Entity: This option skips the entity entirely and nothing will be written to the database.

- Select Entity: This option gives you a selection tool to choose which entity in ACT! gets updated.
- 

**"If multiple matches are found"**: This option sets what happens when more than one source contact matches one or more contacts in your database. Here are your choices:

- Add Entity: This option adds the source entity as a new entity in ACT!.
- Select Entity: This option gives you a selection tool to choose which entity in ACT! gets updated.
- Skip Entity: This option skips the entity entirely and nothing will be written to the entity in your database.
- Update All: This option will update the multiple matching entities with the import field data.

**"Create backup"**: By checking this box, you can select to make a backup of your data before the merge process. You need to choose where you would like to save your backup file to.

**"Save merge log"**: This option will create a log file of errors resulting from a problem during the merge process. You must specify where the log file is saved to. **NOTE: You will need to use the MergeAdmin LogViewer to see the errors. To learn more about the LogViewer, see the MergeAdmin LogViewer help topic.**

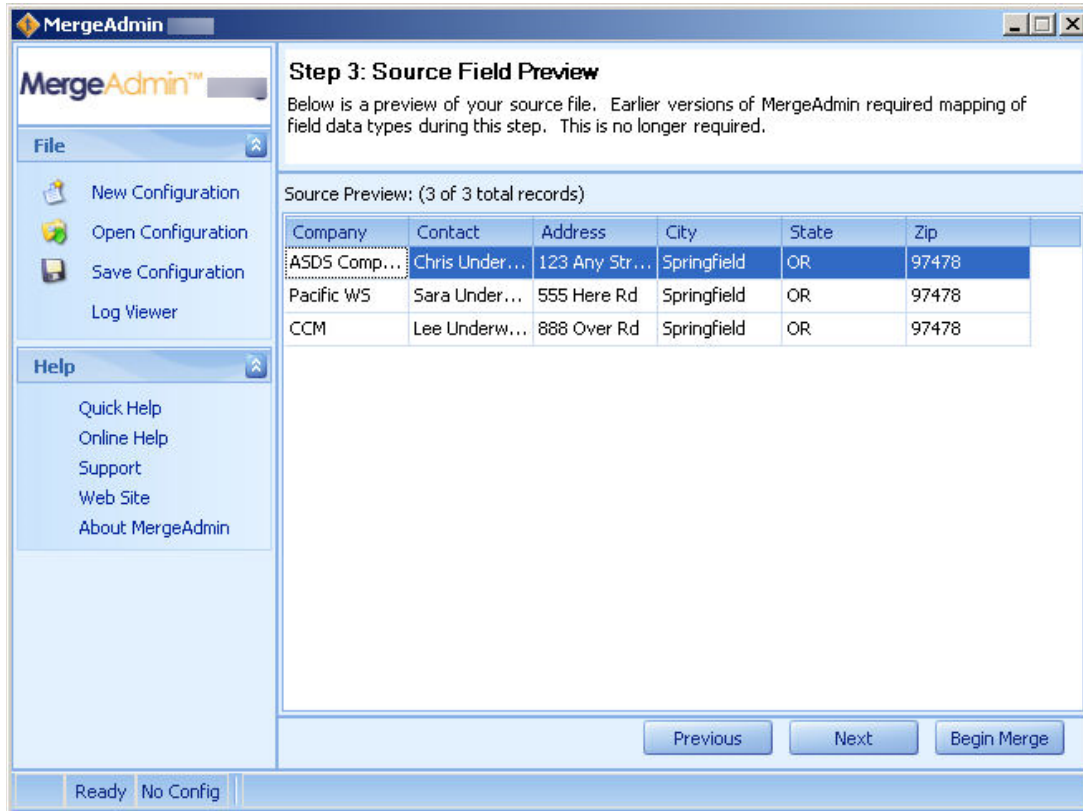
**"Add merged contacts to KEYSTROKE.MergeAdmin group"**: This option creates a group in the ACT! database of all updates and changes that took place during the MergeAdmin process.

**"Verify merged data matches source data"**: By checking this option, during the merge process the data will be checked against the import file to ensure the data successfully matched up. **NOTE: By checking this option, it can extend the time it will take to complete the merge.**

Click the **Next** button to continue to the next screen in the wizard or click **Begin Merge** to start the merge process.

## Step 3. Source Field Preview

This panel shows you a preview of your import data. In previous versions of MergeAdmin, you were prompted to select your data types for each field. That step is no longer necessary.



**NOTE: Only the first ten records are shown here.**

Click the **Next** button to continue to the next screen in the wizard or click **Begin Merge** to start the merge process.

## Step 4. Match Criteria

The next step in the process is selecting the matching criteria that will be used to find a match between your source file and your ACT! database.

### ACT! Field

These are the fields in your ACT! database.

### Operator

These are the available operators you can use when linking your ACT! fields to your Source fields. By clicking the drop-down, you will have access to the various operators listed here.

### Source Field

These are the fields in your import file.

### Switch to Advanced View

By selecting this button, the match criteria screen will be replaced with a query builder screen to allow for more advanced matching capabilities. For more information on Advanced View, see the example below.

Here is an example of the simple match criteria screen filled out. For the advanced matching criteria view, see the example below.

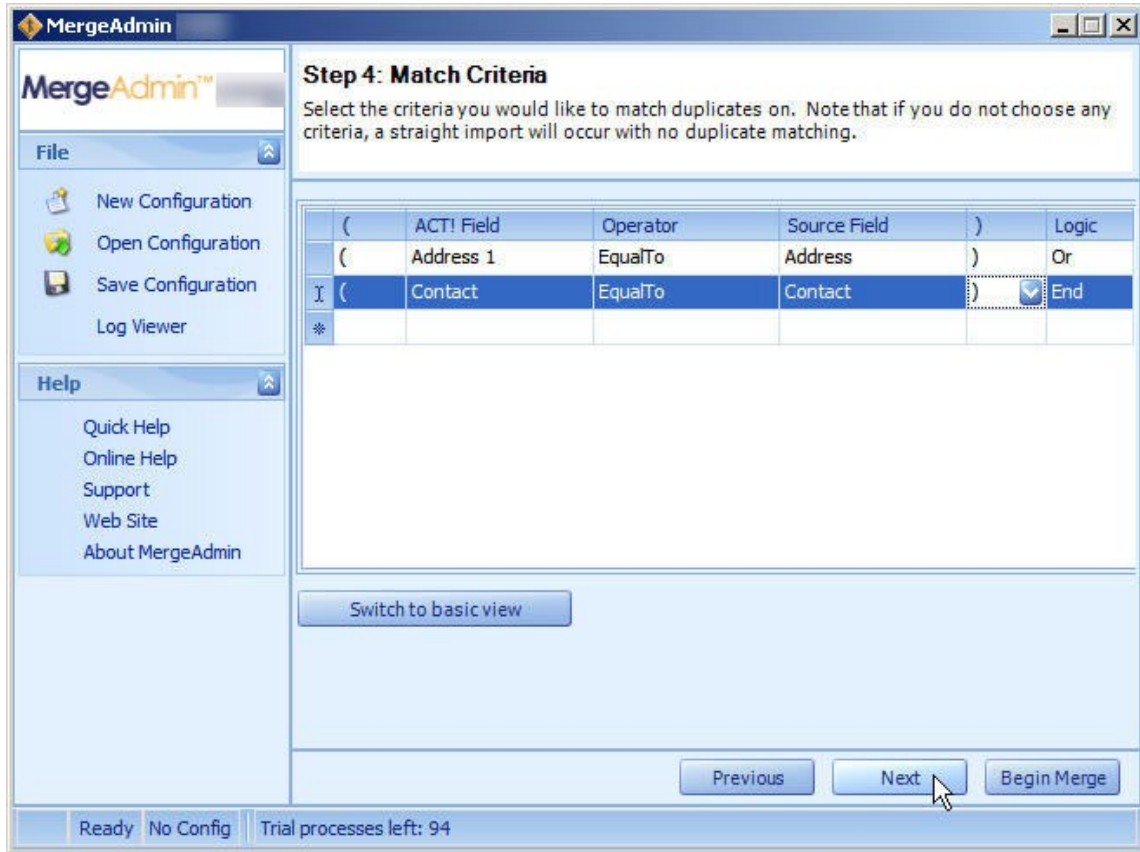
**Step 4: Match Criteria**  
Select the criteria you would like to match duplicates on. Note that if you do not choose any criteria, a straight import will occur with no duplicate matching.

ACT! Field	Operator	Source Field
<input checked="" type="checkbox"/> Address 1	<input type="button" value="v"/> EqualTo	<input type="button" value="v"/> Address
<input checked="" type="checkbox"/> Contact	<input type="button" value="v"/> EqualTo	<input type="button" value="v"/> Contact
<input checked="" type="checkbox"/> Company	<input type="button" value="v"/> EqualTo	<input type="button" value="v"/> Company

Ready No Config Trial processes left: 94

## Advanced Matching Criteria View

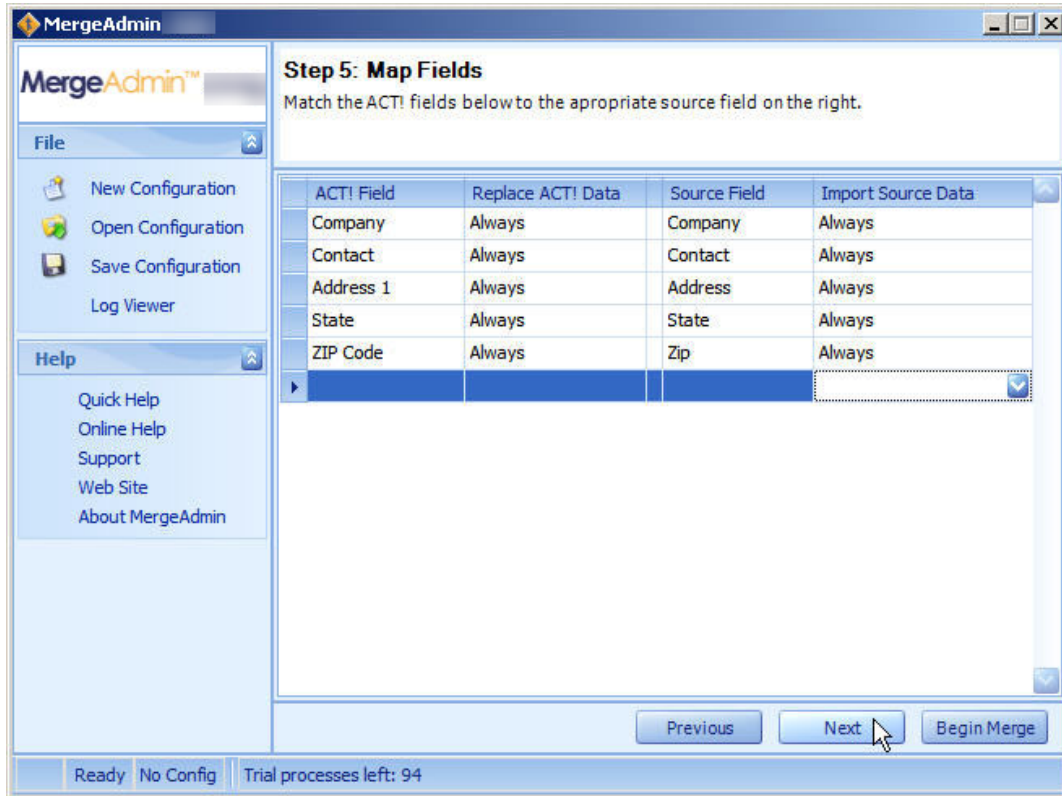
This view allows you to use query-based logic to find your matching criteria. This system is modeled after the ACT! 2010 query builder system. If you wish to switch back to the basic view, you can do so by clicking the button that is labeled "Switch to basic view".



Click the **Next** button to continue to the next screen in the wizard or click **Begin Merge** to start the merge process.

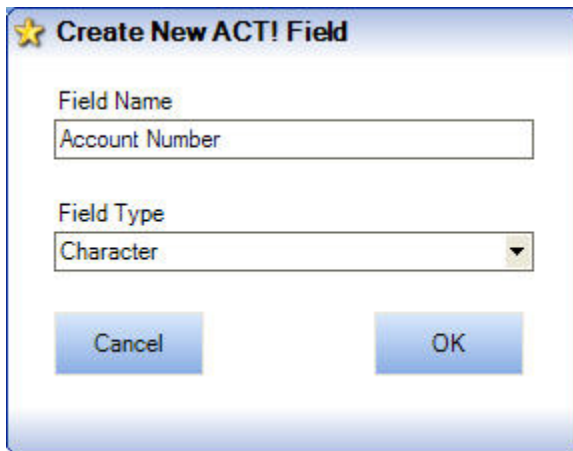
## Step 5. Map Fields

During this process, you will map the fields from the incoming source file to the fields that are already in your ACT! database. See the completed example of this screen filled out below:



**ACT! 2010 Field** - These are your fields that already exist in the ACT! database. You also have the following options under the ACT! Field column:

- **Add Note** - By choosing this from the drop-down list, the data from your source will be created as an ACT! Note.
- **Add History** - By choosing this from the drop-down list, the data from your source will be created as an ACT! History.
- **New Field Button** - By clicking this button, you can create a new field in your ACT! database to map your source data into. See the example below:

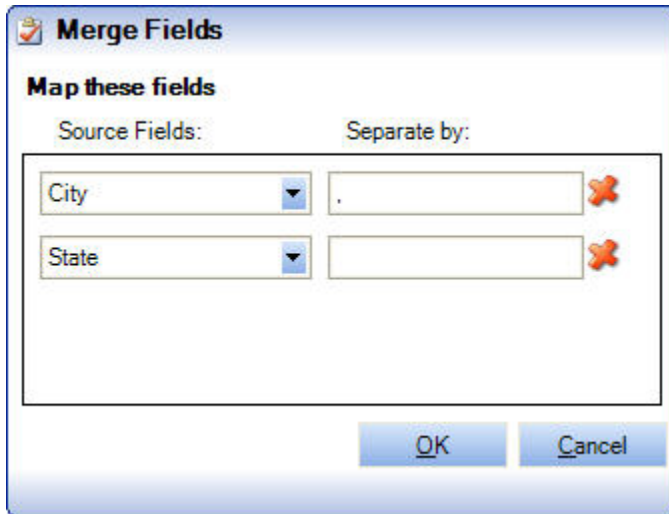


The screenshot shows a dialog box titled "Create New ACT! Field" with a yellow star icon. It contains two input fields: "Field Name" with the text "Account Number" and "Field Type" with a dropdown menu showing "Character". At the bottom are "Cancel" and "OK" buttons.

**Replace ACT! Data** - This choice is used to set whether the data coming in will "Always" replace the existing data or "Only if Empty," meaning there is no data in the ACT! fields.

**Source Field** - These are the fields that are in your import file. You also have the following options under the Source Field column:

- **Merge Fields** - This function will give you the ability to merge two or more source fields into one ACT! field. See the example below:



The screenshot shows a dialog box titled "Merge Fields". Inside, there is a section labeled "Map these fields". Below this, there are two columns: "Source Fields:" and "Separate by:". Under "Source Fields:", there are two dropdown menus. The first dropdown menu is set to "City" and the second is set to "State". To the right of each dropdown menu is a text box for the "Separate by:" column. The first text box contains a period "." and the second is empty. To the right of each text box is a red "X" icon. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

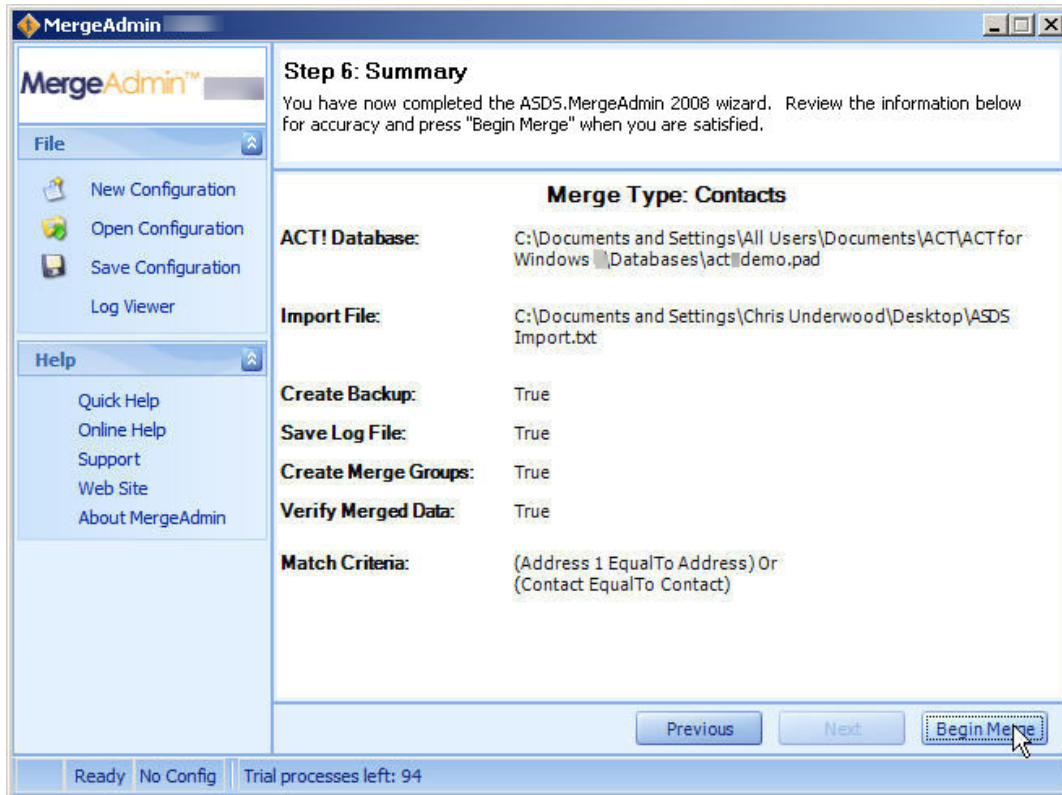
**Import Source Data** - This choice is used to set whether the source data is "Always" imported or "Non-Empty Only" meaning the import data must contain data or it will NOT be imported.

Click the **Next** button to continue to the next screen in the wizard or click **Begin Merge** to start the merge process



## Step 6. Summary

This screen shows you all the options that have been set throughout the MergeAdmin wizard. This is your final chance to review these settings before clicking **Begin Merge** to start the process. If any changes are needed, you must click the **Previous** button to navigate backward through the wizard until you reach the desired step. When clicking Begin Merge, you will be presented with an option to save your changes as a configuration file. At this time, you can choose "Yes" and create a configuration file with your settings to be used for future imports using the same settings. See the example below of the Summary screen.



Click **Begin Merge** to start the merge process.

# Configuration Files

Configuration files are used to store previously saved settings such as the database info, mapping details, etc. If you are importing files from the same source on a regular basis, you can speed up the 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:

1. Go through the MergeAdmin wizard and fill out the fields accordingly.
2. Click Save Configuration from the "File" area on the left-hand side of the window.
3. Give your configuration file a name and click the **Save** button.

From the "File" area in MergeAdmin, you can do the following:

- Create a New Configuration
- Open a Configuration
- Save a Configuration

## 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.

**Existing Record**

Contact already exists. Update contact, add contact or skip contact?

Field	Value
Company	CH Gourmet Gifts
Fullname	Ernst Anderson
Firstname	Ernst
Lastname	Anderson
Email	
Phone	
Address 1	
Address 2	
City	
State	
Postal Code	
Last Edit	4/9/2007 2:01:49 PM

Import Data

Public  
Chris Huffman  
CH Gourmet Gifts  
Cecil Carter  
13 East 54th St.  
  
New York  
NY  
10034  
United States  
Coworker  
212-555-7323  
212-555-7750  
  
Cecil  
7/5/2002

Update Add Skip

Previous versions of MergeAdmin used the below dialog.

**Existing Contact**

Contact already exists. Update contact, add contact or skip contact?

Field	Value
Record Creator	Chris
Last Edited By	Chris Huffman
Record Manager	Chris Huffman
IsUser	User
Home State	NY
Home Country	United States
Last Reach	3/13/2005 8:30:00 AM

Update Add Skip

## Select Entity Dialog

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

- 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.

**Select Contact**

Based on your matching criteria, the following contact already exists in your database.

**Source Record:**

Public/Private:	Public
Record Manager:	Chris Huffman
Company:	CH Gourmet Gifts
Contact:	Jane Chan
Address 1:	13 East 54th St.
City:	New York
State:	NY
Zip:	10034

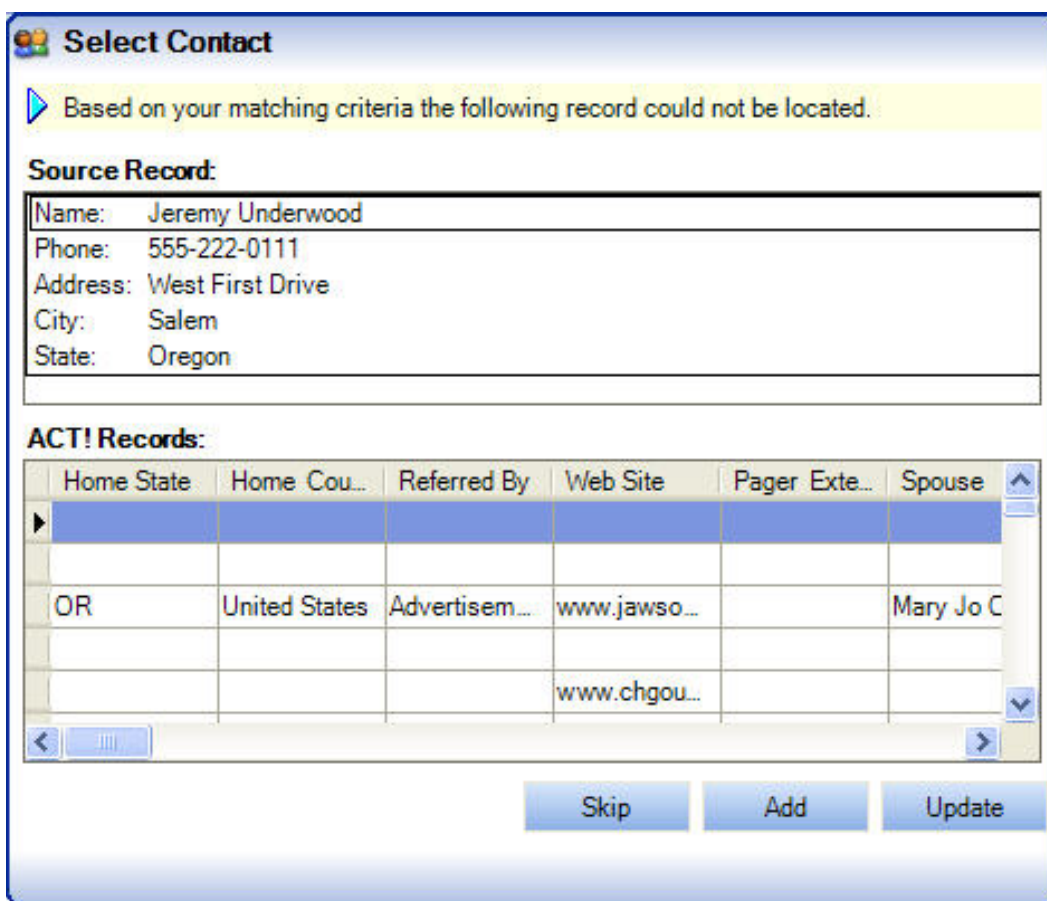
Select a row below to update with the Source Record above, then click Update. Click Add to create a new record based on the above source.

**ACT! Records:**

Company	First Name	Last Name	E-mail	Phone	Address 1	Address 2	City	State	ZIP Code
CH Gourmet Gifts	Ernst	Anderson							
CH Gourmet Gifts	Cecil	Carter							

Update Add Skip

Previous versions of MergeAdmin used the below dialog.



**Select Contact**

Based on your matching criteria the following record could not be located.

**Source Record:**

Name:	Jeremy Underwood
Phone:	555-222-0111
Address:	West First Drive
City:	Salem
State:	Oregon

**ACT! Records:**

Home State	Home Cou...	Referred By	Web Site	Pager Exte...	Spouse
OR	United States	Advertisem...	www.jawso...		Mary Jo C
			www.chgou...		

Skip Add Update

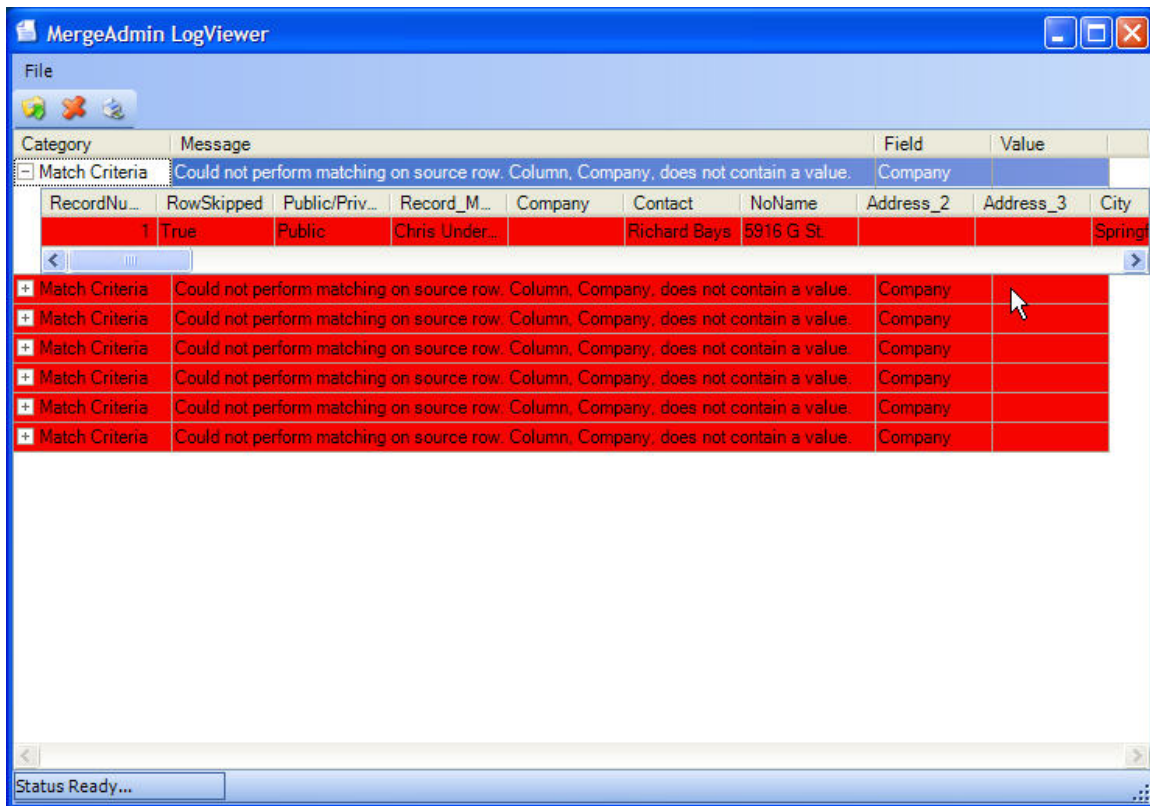
# MergeAdmin LogViewer

## 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 have enabled this option. In addition, the error log will allow you to make changes to the data that failed and re-export just the fixed data out as a new file. You can then re-import this fixed file instead of having to re-import your entire file.

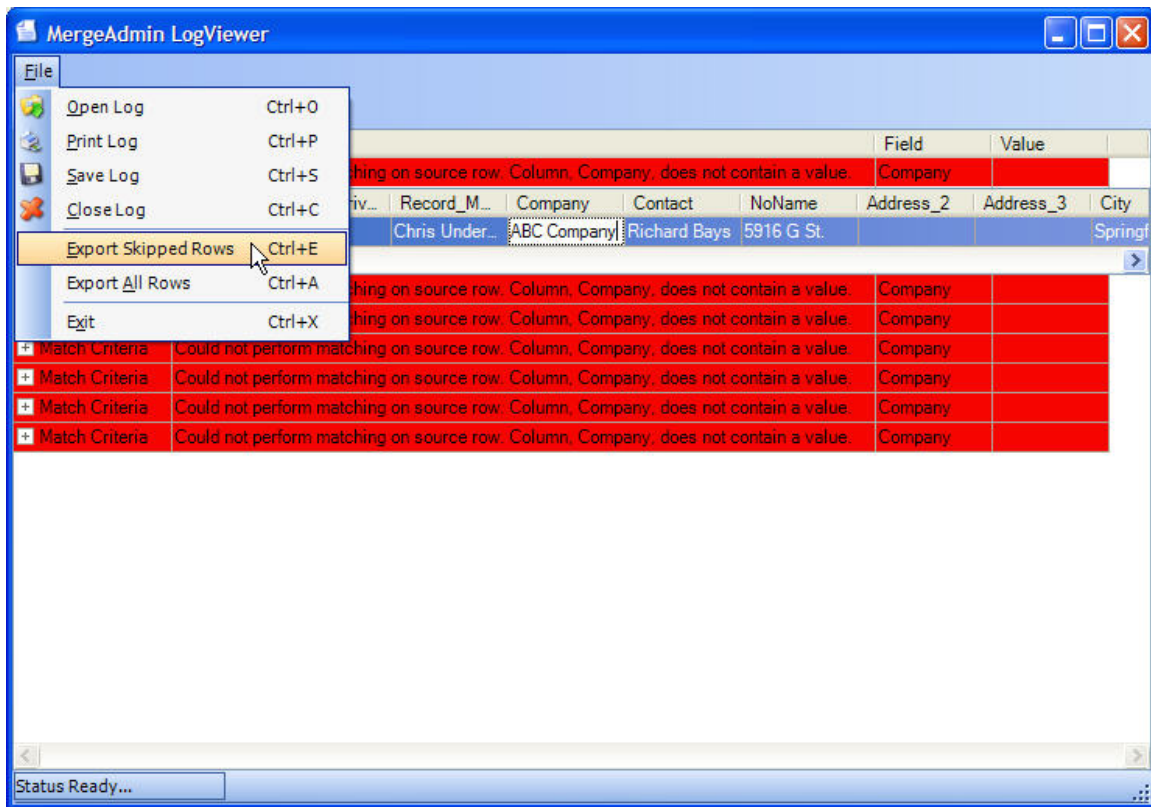
You can launch the log viewer from **START > PROGRAMS > KEYSTROKE > MERGEADMIN > MergeAdmin LogViewer**. You can also click "LogViewer" from the "File" area on the MergeAdmin program window. Once the MergeAdmin LogViewer is launched, go to FILE > OPEN and browse to the location you saved your log files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

Below is a screenshot of the LogViewer.



In the example above, companies were mapped to ACT! from the source file, however, the entities above did NOT contain a company name; therefore they were excluded from the merge process.


As shown in the example below, 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. See the example below for this dialog box.



# Automating MergeAdmin

Users who wish to bring in files unattended at night or multiple times per day can use our product.

AutoAdmin automatically imports in ACT! using the MergeAdmin software. By using MergeAdmin to set up an import, you can set AutoAdmin to automatically launch and execute your saved MergeAdmin configuration. See the steps below:

1. You must first use MergeAdmin to set all of the parameters of the import and then save the configuration using the save option in MergeAdmin.
2. Create a new timeslot in AutoAdmin following the steps found in this help file.
3. Under the "Misc" tab, select the option for "Launch MergeAdmin using config:"
4. Press the  button to browse to where you saved your MergeAdmin config file and choose **Open**.
5. Click the Apply button to save the changes.

## Trial Ware Information

### Trial Ware Information

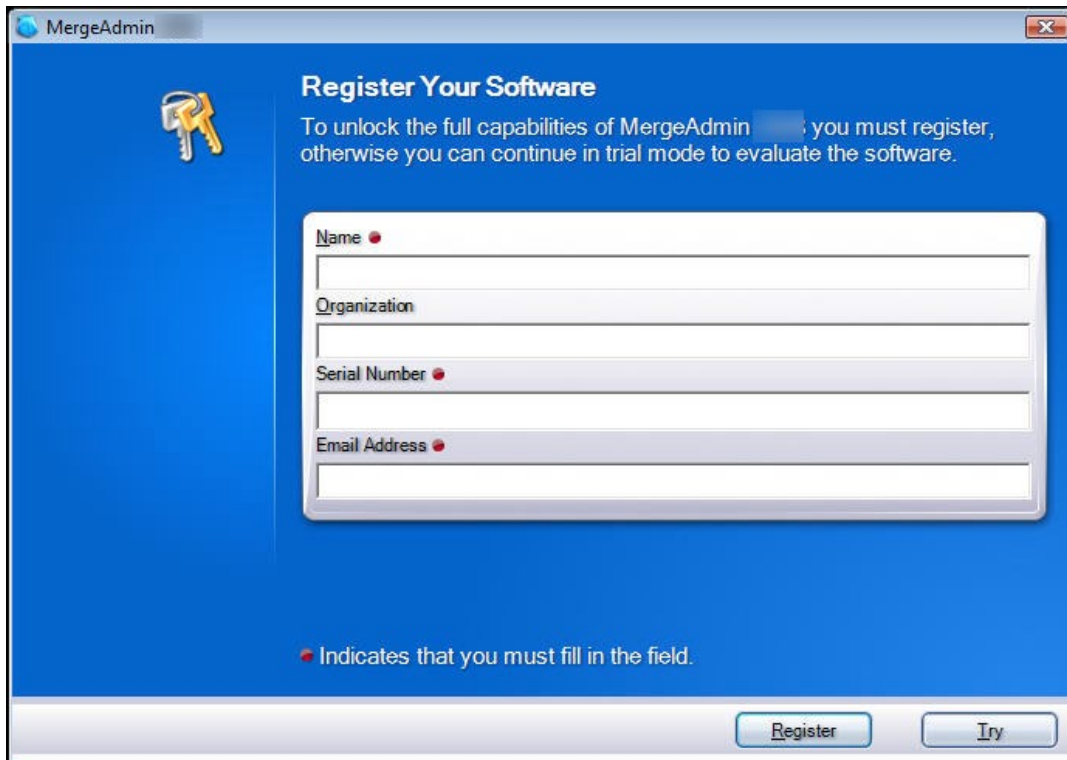
MergeAdmin comes with a 30-day trial that is limited to a 500 contact import. When you launch MergeAdmin you will be prompted to try the program or register. You can utilize your 30-day trial by simply clicking the 'Try' button. If you have purchased the software, you can choose the 'Register' button and continue through the process by activating your software. See the example below:



# Registration

## Registration

When you choose to register your product, you will be prompted to input your information as shown below. You must fill out the fields marked with a red circle. Upon entering this information, you will choose the 'Register' button to continue on to activation.



The image shows a screenshot of the MergeAdmin software registration window. The window has a blue background and a title bar that says "MergeAdmin". On the left side, there is a yellow key icon. The main heading is "Register Your Software". Below this, a message states: "To unlock the full capabilities of MergeAdmin you must register, otherwise you can continue in trial mode to evaluate the software." There are four input fields: "Name", "Organization", "Serial Number", and "Email Address". Each field has a red circle next to its label, indicating it is required. At the bottom left, a legend says: "Indicates that you must fill in the field." At the bottom right, there are two buttons: "Register" and "Try".

**Register Your Software**

To unlock the full capabilities of MergeAdmin you must register, otherwise you can continue in trial mode to evaluate the software.

Name •

Organization

Serial Number •

Email Address •

• Indicates that you must fill in the field.

Register Try

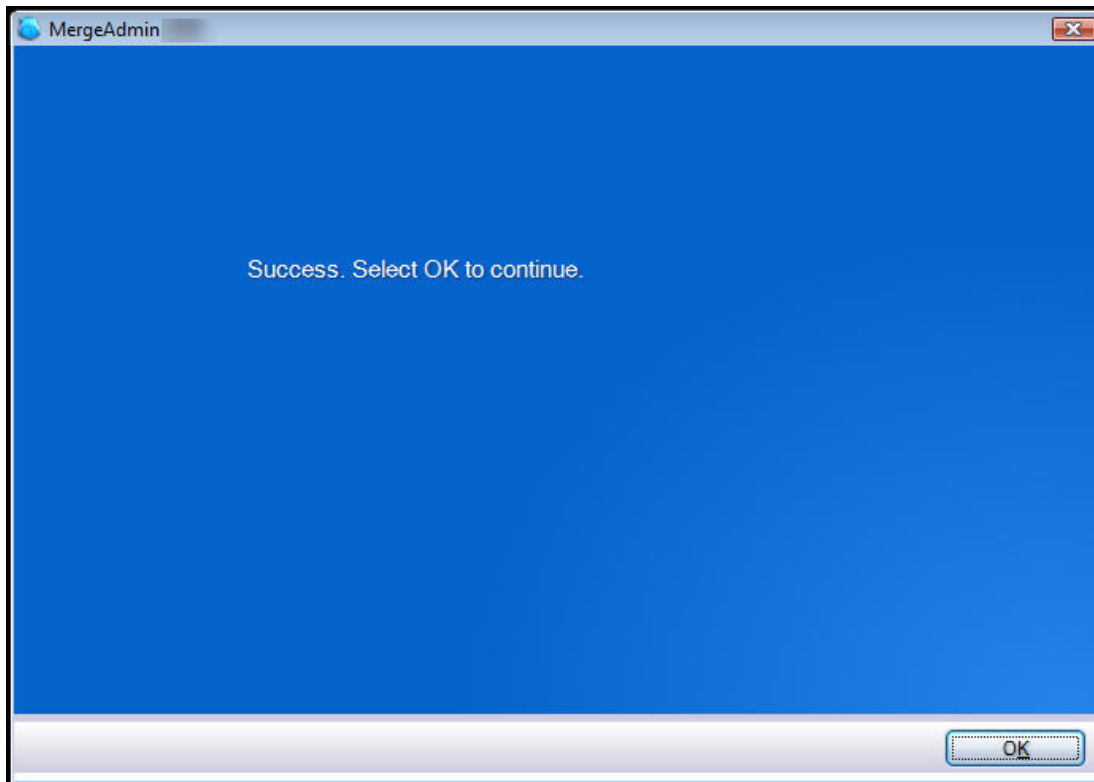
# Activation

## Activation

Once you have entered your information on the 'Register Your Software' window, you will be prompted to Activate Your Software. See the example below:



Once you choose 'Activate online now', you will see the following box to show it was successful.



**Note:** When you activate your software, it can **ONLY** be used on the machine in which it was activated on. If you choose to install it on another machine, you **MUST** 'Deactivate' the software first and then 'Activate' it on the new machine.

# Troubleshooting

## Frequently Asked Questions

**Question:**

How do you launch the application?

**Answer:**

MergeAdmin is loaded by going to **Start > Programs > KEYSTROKE > MergeAdmin >**

**Question:**

When trying to create a new configuration file nothing happens.

**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 un-install. 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.

# Technical Support

## Contact Us

Technical support is available by visiting the KEYSTROKE support site. We offer several services to meet your technical support needs. Please visit us today @ [www.Keystroke.ca/support](http://www.Keystroke.ca/support) to see if there are any known issues with your product.

**Please note:** We only support issues or errors with the MergeAdmin software itself. Any troubleshooting of import files, helping with the setup of map configurations, etc. are subject to our current billable rate.