

Save Time. Work Smarter. Sell More.

MergeAdmin™ for Act!

Merge and import data into Act! on a field-by-field level!

Do you have valuable customer information in other databases that you would like to add and update in Act?

Are you looking for a reliable, fast, and flexible way to import ASCII data into Act!?

MergeAdmin for Act! 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 useful information from other sources. You determine how to match records and which fields to update, while all other fields remain intact.

KEY FEATURES:

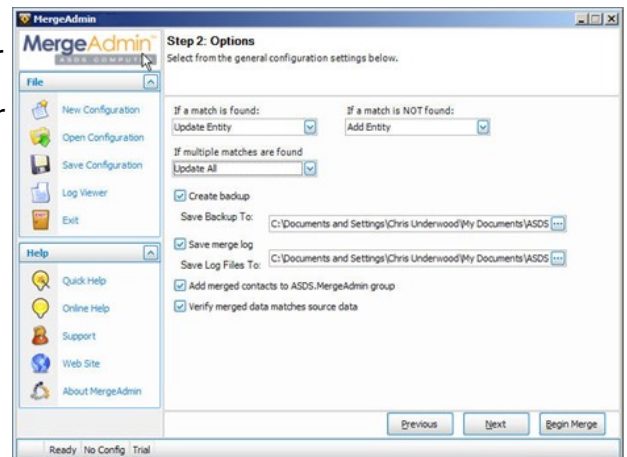
- ◆ Merge data from external input files into Act! on a field-by-field level.
- ◆ Reliably merge or import ASCII data in CSV or tab-delimited formats.
- ◆ Merge and import into Contact, Company, or Group records.
- ◆ Use AutoAdmin for Act! to automatically run MergeAdmin completely unattended. Run overnight or multiple times per day to keep data between systems current.

Update existing records with new field data!

Example: to update today's year-to-date sales figures from your accounting system into a 'YTD Sales' field in Act!, simply follow these three steps using MergeAdmin:

1. Select the ASCII input file created from your accounting system that you want to merge with your Act data.
2. Set your custom match criteria to control exactly what happens when MergeAdmin finds a match between records in your data file and existing records in Act!. Your match criteria can be up to three fields in your Act! database, such as 'Contact Name, Phone Number and Address1,' or simply 'Customer ID#.'
3. Map the sales data in your ASCII input file into the destination 'YTD Sales' field in Act! to update just that field when MergeAdmin finds matching records.

MergeAdmin for Act! then updates your Act! data with useful and timely information that your front-line sales team and marketing staff can use immediately. New records are added to Act! when matches are not found, saving you hours of re-typing to keep your Act! data current!



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Merge and import data into Act! on a field-by-field level!

If you can get external customer data into an ASCII file, you can update existing Act! Contact, Company, or Group records with the latest information in just a few minutes!

EASILY IMPORT DATA INTO ACT!

Merge data from an external input file into ACT! on a field-by-field level. Map input fields to Act! Contact, Company, or Group fields and only update selected fields leaving other data intact. The ASCII input file can be quote/comma separated values (.CSV), semicolon-delimited or tab-delimited format (all formats are supported by Microsoft® Excel). Supports all ACT! field data types including: character, number, phone, currency, email, URL, time, date and more. Create new fields in Act! from MergeAdmin without having to start Act! Step-by-step wizard interface requires no advanced technical skills. Automatically backs up your database before the import.

UPDATE EXISTING ACT! RECORDS WITH NEW INFORMATION

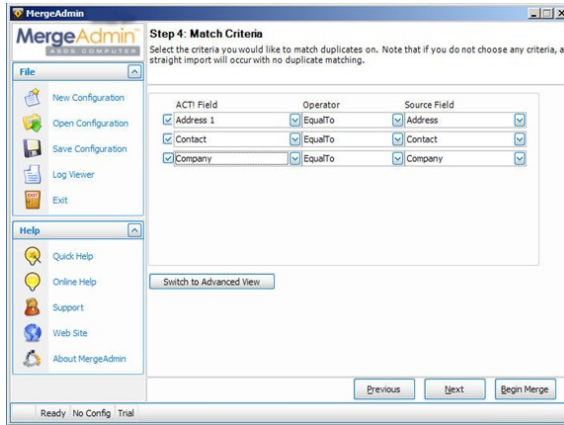
Identify matches between records in the input files and the target ACT! database by matching on up to three fields that you choose. You decide what action to take when there is a match, 'no match', or 'multiple match' conditions. New contact, company, or group records are added when no match is found. Combine multiple fields into one when importing (combine 'Joe' and 'Smith' into 'Joe Smith').

TRACK AND MANAGE THE NEW INFORMATION

Create a Group that includes new and added contacts from the most recent merge. If the Act! field option to 'generate history' is enabled, new data merged by MergeAdmin will create a history entry identifying field data that has changed. Creates a log for each merge identifying merge errors and status. Save your settings in multiple map files and use them again.

SYSTEM REQUIREMENTS

- ◆ MergeAdmin for Act! requires ACT! v18 or higher on the same PC, network workstation or network server.



CUSTOMER TESTIMONIALS

"I'm stoked about this product. My customer will be able to do his monthly financial updates with a minimum of effort and be assured that it is correct. We tested on a couple of other databases and all is well in the land of text import!"

◆ Tamara Traylor, CO

OTHER GREAT ACT! ADD-ONS FROM KEYSTROKE

AutoAdmin - Award-winning unattended backup and maintenance of unlimited ACT! databases!

AutoLimited Access - Automatically and accurately control limited access at the point of data entry!

DocAdmin - Scan and attach hard copy documents as PDFs in ACT!

FaxAdmin - Fax directly out of ACT!

MigrateAdmin - Convert Goldmine® data to ACT! without leaving valuable information behind!

KEYSTROKE AWARDS AND CERTIFICATIONS

- ◆ AutoAdmin is the winner of the "ACT! Vision Award" for best Add-on
- ◆ Act! Software Development Partner (ADP)
- ◆ World's #1 Act! Reseller
- ◆ Diamond Act! Certified Consultant (ACC)
- ◆ Microsoft Certified Solution Developer



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