

Quick Start Guide

Takes only a few minutes to read...



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Welcome to eGrabber DupChecker for ACT!

Thank you for choosing eGrabber DupChecker for ACT!. To help you get started quickly we have included this guide. It takes only a few minutes to read this guide and you can start using the product.

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About eGrabber DupChecker for ACT!

eGrabber DupChecker for ACT! enables you to maintain a duplicate free database. It is the quickest way to find, merge/purge all duplicates or near duplicates in ACT!

eGrabber DupChecker for ACT! matches records that are similar in the following attributes:

- Phonetically
- With spelling errors
- Abbreviated in one and spelt in another
- Name and company swapped
- Partial matches

And lots more...

System Requirements

- Pentium PC or higher
- 1 GB RAM for database containing less than 25000 records
- 2 GB RAM for database containing more than 25000 records
- Operating System Supported:
 - Microsoft Windows 7 Professional & Ultimate Editions
 - Microsoft Windows Vista (Enterprise Edition)
 - Microsoft Windows XP
- Works with...
 - > ACT! 2012 Pro and Premium
 - > ACT! 2011 Pro and Premium
 - > ACT! 2010 Standard and Premium for workgroups
 - > ACT! 2009 Standard and Premium for workgroups
 - > ACT! 2008 Standard and Premium for workgroups
 - > ACT! 2007 Standard and Premium for workgroups
 - > ACT! 2006 8.0.2.81 / 8.0.2.82

Using eGrabber DupChecker for ACT!

This section explains the following:

- Invoke eGrabber DupChecker
- Generate Duplicate Analysis Report
- View duplicate results
- Merge duplicate records in ACT!
- Group duplicate records in ACT!

Invoke eGrabber DupChecker

When you complete the installation of eGrabber DupChecker, an additional menu, **DupChecker**, is included in ACT! Menu bar.

- Open the ACT! database for which you want to check the duplicates.
- Click Find Duplicates on the DupChecker menu.

🕆 ACT! by Sage Premium - demoDB								. 6			
Ele Edit View	v Lookup <u>C</u> ont	acts Groups Companies	Schedule	Write Reports	; <u>T</u> ools <u>H</u>	telp Dup	Checker				
🕴 4 70 of 149 🕨 🕅 🐍 Contacts 🔊 Contact List 🥞 💾 🍫 🚴 🍇 🐜 🕐 🗊 📭 Generate Duplicate Analysis Report (free) 💦											
A Pack	4 Put D Contract Detail										
A Dave &	Contac						Report an is	sue		r companios	
2	Company	CT Consulting and Training LL	d	Address				E-mail			
Contacts	Contact	Joan O'Connell						Messenger ID			
<u>}</u>	Salutation	Joan									
Groups	Title		~	City			~	ID/Status	eGrabber	~	
Groups	Department		¥	State		~		Spouse			
	Phone	203.323.0662 Ежt		ZIP Code				Birthday		~	
Companies	Mobile			Country	USA		~	Referred By		~	
and the second s	Fax	732-458-0044		Web Site							
Calendar								Last E-mail		~	
Ê	Last Results						~	Edit Date	1/28/2008	~	
	Last Reach		~	Last Attempt		_	~	Last Meeting		~	

Figure 1: DupChecker Menu in ACT!

This opens the eGrabber DupChecker Grid with the duplicate results.

Database Login

When eGrabber DupChecker is launched, the **ACT! Link Options** is displayed for the first time as shown in Figure 2.

You need to login to ACT! database to view the results in the DupChecker.

ACT! 2007 Link	Options	X
Login About		
Database File :	ments\ACT\ACT for Windows 9\Databases\Sample.pad	
Username :		
Password :		
Result	Login Success	
	Login	
ОК	Cancel Apply Help	

Figure 2: Login to ACT!

- In the Link Options dialog box enter your ACT! database user name and password.
- Click Login.
- The message Login Success is displayed in the Results area.
- Click OK.

After logging into ACT! database, you need to activate the License for the first time.

License Activation

If you have purchased the License Key, you can activate the License as follows:

- > Open the ACT! database that should be checked for duplicates.
- > Launch eGrabber DupChecker and click **Tools > Activate License**.
- The License Activation dialog box appears prompting you to enter the License Key.
- > Enter the License Key and click **Permanently associate the key**.
- Once you enter the License Key, the Key is associated with the currently opened ACT! database.

eGrabber DupChecker for ACTI - License Activation 🛛 🔀							
Please type or paste your license key here.							
· · · · ·							
Permanently associate key to database: dodemo							
E:\MyDocuments\ACT\ACT For Windows 10\Databases\dcdemo.pad							
WARNING: DupChecker database license will be permanently associated with this database, which cannot be changed in future.							
Permanently associate the key Cancel							

Figure 3: License Activation

Once you enter the License Key, the Key is associated with the currently opened database in ACT!. You cannot use the same Key for another database.

Refer to the Help Topics or the User Manul for more details about the different License schemes available.

Run in Trial mode

If you want to evaluate DupChecker, click the Cancel button.

Next, click **File > Find Duplicates**. Now a **License Activation** dialog box is displayed as shown in the following figure.

eGrabber DupChecker for ACT! - License Activation	<				
Please type or paste your license key here.					
Permanently associate key to database: dcdemo					
E:\MyDocuments\ACT\ACT For Windows 10\Databases\dcdemo.pad	1				
WARNING: DupChecker database license will be permanently associated with this database, which cannot be changed in future.					
Permanently associate the key Irial Run					

Figure 4: Run in Trial Mode

Click the **Trial Run** button in this dialog box.

DupChecker is launched in the trial mode.

In the trial mode, the first 200 records are checked for duplicates and you can use DupChecker to check for duplicates in any ACT! database.

Generate Duplicate Analysis Report

You can run the duplicate report for getting a summary on number of duplicates present in your database.

Click **DupChecker > Generate Duplicate Analysis Report (free)** from the ACT! menu bar (Refer Figure 1). This option generates a report on the number of duplicates found in the currently opened ACT! database.

You can also click **File > Generate Duplicate Analysis Report (free)** from the DupChecker menu bar to run this report.

The Duplicate Analysis Report displays the number of duplicates along with the break-up details like number of duplicates based on

- Name / Company
- Email
- Phone Number
- Address

	for ACT! - Analysis F	Report	
Grabber		eGrabber DupChe Analysis Re	cker port
atabase name: dcdemo Records Scanned: 152	2	Date: Aug 04,	2008
# Dupl	icate Contact	s Detected: 54	
# Duplicates by fiel	ld match		
Name/Company r	natch	54	4
Email match			6
Phone match		24	4
Addee a successfully			
Address match	Dun Chaskan data	10	J
Address match How eGrabber's <u>Fuzzy ma</u> due to typing/spelling nicknames, abbreviat following records will Examples: All combine	DupChecker deter tohing technology looks for mistakes, pronunciation en ons, import mapping errors be considered as being er ations listed below would b	ects duplicates variations in record that happens fors, formatting/punctuation errors, retc., The end result being all of the pulvalent: e detected as being duplicates	ē
Address match How eGrabber's <u>Fuzzy ma</u> due to typing/spelling nicknames, abbreviati following records will Examples: All combine Contact	DupChecker deter tehing technology looks for mistakes, pronunciation en ons, import mapping errors lab considered as being er ations listed below would b Company	ects duplicates variations in record that happens rors, formattinglyunctuation errors, etc., The end result being all of the juivalent: e detected as being duplicates Address	e
Address match How eGrabber's <u>Fuzzy ma</u> due to typing/spelling nicknames, abbreviati following records will Examples: All combine Contact Robert Marshall	DupChecker deter tohing technology looks for mistakes, pronunciation errors labe considered as being er ations listed below would b Company Hewlett Packard	ects duplicates variations in record that happens fors, formatting/punctuation errors, etc., The end result being all of the pulvalent: e detected as being duplicates Address #123 East Main Street, CA	
Address match How eGrabber's <u>Fuzzy ma</u> due to typing/spelling nicknames, abbreviati following records will Examples: All combine Contact Robert Marshall R. J. Marshalls	DupChecker dete tehing technology looks for mistakes, pronunciation en ions, import mapping errors be considered as being er ations listed below would b Company Hewlett Packard Hwelette Packard	ects duplicates variations in record that happens rors, formatting/junctuation errors, retc., The end result being all of the juivalent: e detected as being duplicates Address #123 East Main Street, CA 123 Main Street, CA, 94070	e
Address match How eGrabber's <u>Fuzzy me</u> due to typing/spelling nicknames, abbreviat following records will Examples: All combine Costact Robert Marshall R. J. Marshalls Bob Marhsall	DupChecker dete technology looks for mistakes, pronunciation err nos, import mapping errors be considered as being er ations listed below would b Company Hewlett Packard Hwelette Packard	ects duplicates variations in record that happens fors, formatting/punctuation errors, etc., The end result being all of the pulvalent: e detected as being duplicates Address #123 East Main Street, CA, 123 Main Street, CA, 94070 123 E Main St	e
Address match How eGrabber's <u>Fuzzy ma</u> due to typing/spelling nicknames, abbreviati following records will Examples: All combine Contact Robert Marshall R. J. Marshall Robert J Marshall Robert J Marshall	DupChecker deter tohing technology looks for mistakes, pronunciation en ions, import mapping errors le considered as being eo ations listed below would b Company Hewlett Packard Hyp Hewlett Packard Inc	ects duplicates variations in record that happens rors, formatting/jounctuation errors, retc., The end result being all of the puivalent: e detected as being duplicates Address #123 East Main Street, CA 123 Main Street, CA 123 East Main Street 123 East Main Street	

Figure 5: Duplicate Analysis Report

If you are running a trial version of DupChecker, the report displays only part of the duplicate records. In addition, you can run this report only once in three months in the trial version.

You can purchase a License Key to view all the duplicate records available in your database and to merge / purge the duplicate records.

Click **Email this report** to send the contents of the report as email message.

Click **Print this report** to print out the report.

Click **Close** to view the duplicate records in the DupChecker Grid.

View Duplicate Records

- eGrabber DupChecker for ACT! displays the possible duplicate records in groups as shown in Figure 6.
- The first record in each group is considered as the "Reference" (Ref) record and the matching percentage is computed based on this record.
- Select the **Match Percentage** values (on the top left) to view groups between specified ranges of percentage. You can select the range from 50% to 100%.

🕮 eG	rabb	er DupC	hecker f	or ACT! - Untitled[dc	demo]					
E Ele	Ele Edit View Merge Iools Help									
	🖓 Open 🙀 Save 🦝 Save As 🔿 Stop 🗇 Merge Preview 🗂 Merge All 🗇 Merge Selected 💭 Group Selected 📝 Report an issue 🔕 Options 😧 Help									
_ 00										
#		Match Id	Match%	Contact	Company	Title	Business Email	Phone	Address1	City 🔺
1		1	Ref	Joan O'Connell	CT Consulting and Training			203.323.0662		
2		1	96.00	O'Connell	CT Consulting and Training		joan@ct-ct.com			Darien
3										_
4		2	Ref	Chris Williams	CRM Solutions, Inc			631.265.6356		Milford
5		2	94.00	Kris William	CRM Solutions			2032829492		Milford
6	_									
7	<u> </u>	3	Ref	Dwight						
8		3	95.00				dwight@bridgeconcepts.	877 228 5454		Costa Me
9	-									
10	<u> </u>	4	Ref	William Conner	Compu-Tutor Inc.				#92038 Perfect Blvd.	
11	Г	4	97.00	Bill Conner	Compu-Tutor Inc.		bconner@compu-tutor.ne	610.260.0300	92038 Perfect Blvd.	Conshoh
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13	1	5	05.00	Gregory Knapp	Aspentech Consuling On		gknapp@aspen-tecn.com	000.000.4220		Detroit
14	1.1	5	95.00	wr.Gregory Knapp	Aspentiech Consulting Inc					_
15	-	6	Ref	Bonnia Roharte	Fortier Consultion 11.C			977 545 2329		_
10	1	6	94.00	Boherts	Fortier Consulting, LLC		hoopie@fortiercopsulting	877 545		Portemou
10		•	34.00	110000110	r or nor - corrisoning		control for the control and g	011 040		Portollog
10	D	7	Ref	Gavelek Cindy	C.Scane. Inc.		cindv@cscaneinc.com	(540) 338 9300	#1783 FoxDowns	
20	E.	7	95.00	Cindy Gavelek	C-Scape Inc.		en na) @eeeenpen rezeenn	540 338 9300	1783 Fox Downs Lp	Oivile
20				,						
22		8	Ref	Patricia Egen Consulting, L	Donald Egen		Dpegen@egenconsulting	423.875.2652		Chattano
23		8	95.00	Donald Egen	Patricia Egen Consulting, L		dpegen@egenconsulting	423.875.2652		-
11	1									<u> </u>
Ľ.	_									<u> </u>
				Process Completed (0	min 11 sec).	2	7 Duplicate set(s) found at a	30% - 100% .		

• Select the range of values and click the **Go** button to view the results.

Figure 6: DupChecker with the duplicate records

 Records displayed in Red color indicate an exact match, while records in Blue color indicate an approximate match.

Merge Duplicate Records

You can merge the duplicate records into one record to have a duplicate free database.

- Select the duplicate records to be merged.
- To select the record, click the checkbox displayed prior to the record.



Figure 7: Merge Records

- Right click the grid and select **Merge Preview**.
- Merge Preview window, as shown in <u>Figure 8</u>, enables you to have full control over the merging process.
- You can select the record that should be considered as **Ref** record (click the header **Source Record1** or **Source Record2** to assign the Reference record.)
- You can also select the field values to be retained or updated in the **Ref** record using the drop down options available for each field.

eld Name	 Source Record 1 	Source Record 2	Target Record
latch id	1	1	
latch%	Ref	96.00	
ontact	Joan O'Connell	O'Connell	Joan O'Connell
reate Date	7/23/2008 8:56:59 PM	7/23/2008 8:56:56 PM	7/23/2008 8:56:59 PM
dit Date	7/23/2008 8:56:59 PM	7/23/2008 8:56:56 PM	7/23/2008 8:56:59 PM
irst Name	Joan		Joan
ast Name	O'Connell	O'Connell	O'Connell
ompany	CT Consulting and Trainin	c CT Consulting and Training	CT Consulting and Training LLC
tie			
epartment			
ddress1			
ddress2			
ddress3			
ity		Darien	Darien

Figure 8: Merge Preview window

You can merge the records by any one of the following methods:

Test Merge

- A new record is created with the values in the Merge Preview column.
- Other records are left intact.

Merge/Purge

The Ref record is updated with the values in the Merge Preview column.

- Secondary contacts, Notes, Histories, Activities, Opportunities of other source records are merged to the **Ref** record.
- All other source records except the **Ref** record are deleted from the database.
- All the merged records are grouped under eDupMergeGrp in ACT! as shown in Figure 9.

ACT! by Sage - Sample							
File Edit View Lookup Contacts Groups Companies Schedule Write Reports Tools Help eGrabber							
💌 Back 🕐	Back View Groups/Companies						
	All Groups - 1 group(s), 0 subgroup(s)	Hierarchy	eDupMergeGrp				
Contacts		Group	eDupMergeGrp				
		Description					
Groups							

Figure 9: Merged Group in ACT!

Group duplicate records in ACT!

- Select the records you want to add to a group.
- Right click and select Group Selected.



Figure 10: Grouping duplicate records

In the **Group Selection** dialog box, either select an already existing group name or enter a new group name.

eGrabber DupChecker fo	r ACT! - Group Selection	×
 Select an Existing Group: 	Customers	•
C Enter a New Group name:		_
	Group Cancel	

Figure 11: Select or Create a group

eGrabber DupChecker for ACT! adds the records to the appropriate group.

ACT! by Sage - Sample								
File Edit View Lookup Contacts Groups Companies Schedule Write Reports Tools Help eGrabber Groups Group List G G								
C DOON C	All Groups + 2 group(s). () subgroup(s)							
	Common	Hierarchy	Common					
Contacts	- eDupMergeGrp	Group	Common					
		Description						
Groups								

Figure 12: Records added to new group

Sample Database

eGrabber DupChecker for ACT! is accompanied by two sample database files in the CSV format.

- 1. Sample Database (60 records)
- 2. Sample Database (150 records)

You can find these files in the folder where eGrabber DupChecker for ACT! is installed.

Click Start > Programs > eGrabber DupChecker for ACT! > Sample Database to open the sample files.

For evaluation purposes, you can import these files into ACT! and test DupChecker.

Suggestions are Welcome

We welcome your valuable ideas and suggestions to help us improve the performance of the product.

Send your feedback, comments and suggestions to support@egrabber.com.

Report an Issue

If you encounter any problem while using eGrabber DupChecker, send the log files to the support team to get the problem solved.

In eGrabber DupChecker, Right-Click and select **Report an Issue** to send an email along with the log files to the support team.

[OR]

In ACT!, Click Report an Issue on the eGrabber menu.

Uninstall eGrabber DupChecker

To un-install eGrabber DupChecker,

Click Start \rightarrow Programs \rightarrow eGrabber DupChecker for ACT! \rightarrow Uninstall eGrabber DupChecker for ACT!.

The Program is removed from your system.

When you un-install eGrabber DupChecker, the log files are not removed from your system. You have to manually select the eGrabber DupChecker Folder and delete these files.

Additional Settings

With DupChecker, you can also:

- Setup duplicate filter by defining criteria for duplicate check.
- Setup to change the Reference Record before merging the duplicates.
- Select or deselect the items like Notes, Histories, Activities, Opportunities to be moved to the Reference Record.
- Select the columns to be displayed in the DupChecker Grid.
- Select the order in which the columns are to be displayed in the DupChecker Grid.

Refer to the Help Topics or the User Guide for more details.

Technical Support

Telephone: (408) 872-3103 Weekdays 8:30 AM - 4:30 PM Pacific Time

Fax: (408) 861-9601

E-mail: support@egrabber.com

Website: http://www.egrabber.com/dupchecker/

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