

Quick Start Guide

Takes only a few minutes to read...



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.

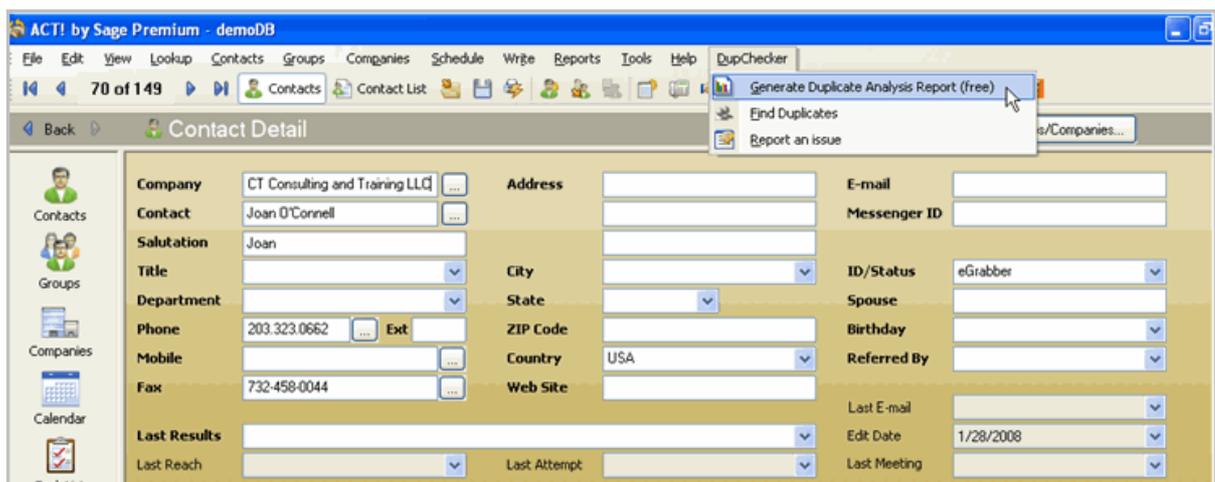


Figure 1: DupChecker Menu in ACT!

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.

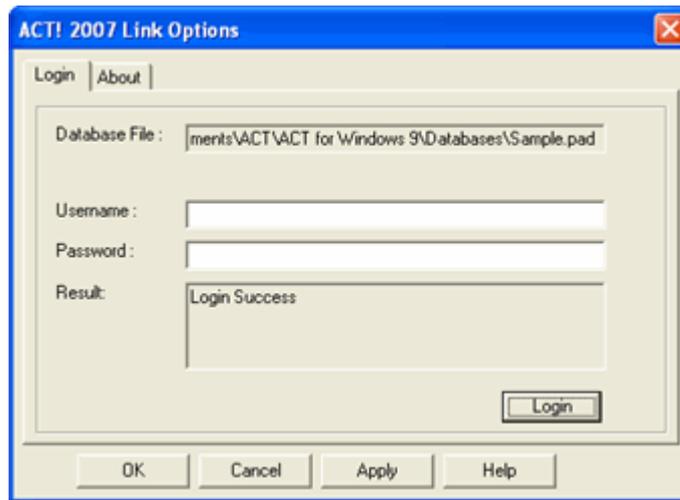


Figure 2: Login to ACT!

- 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.

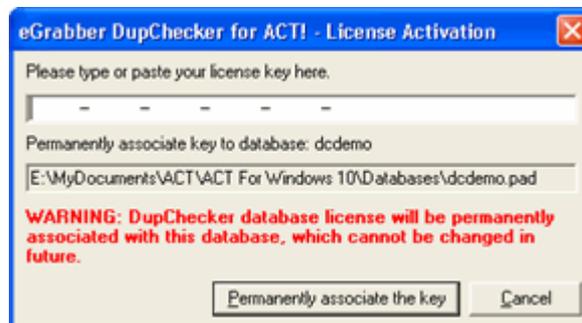


Figure 3: License Activation

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 Manual 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.

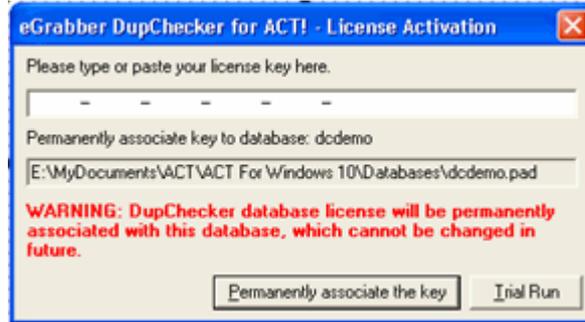


Figure 4: Run in Trial Mode

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

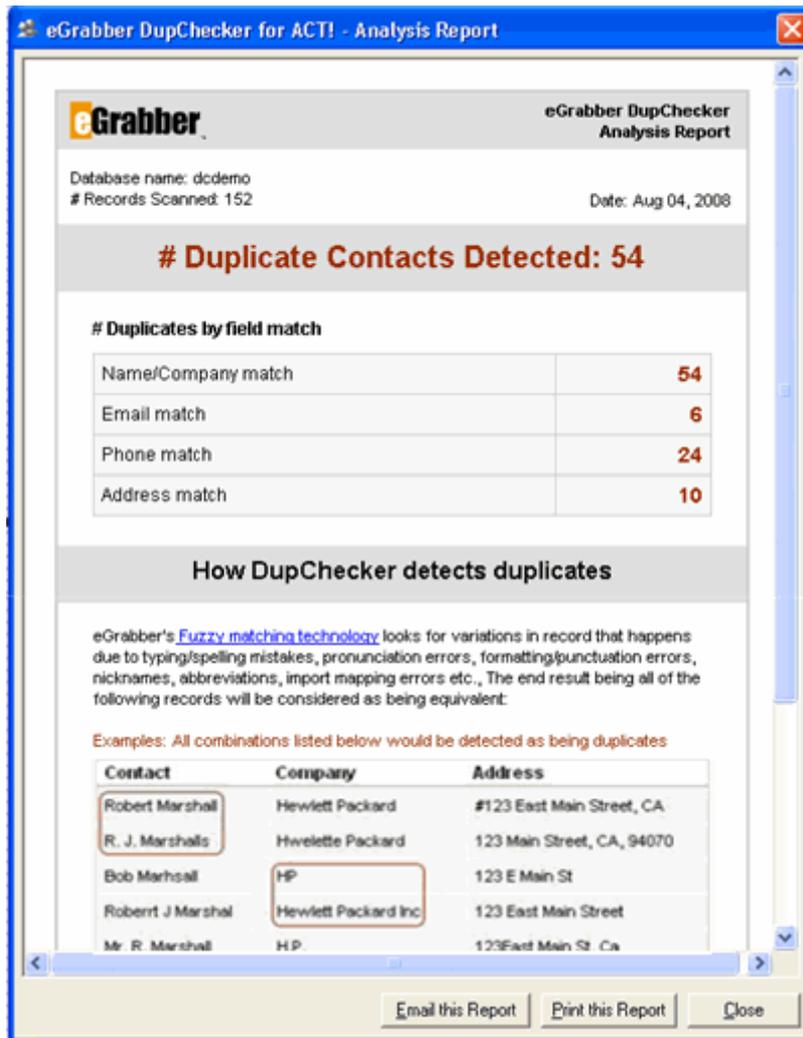


Figure 5: Duplicate Analysis Report

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

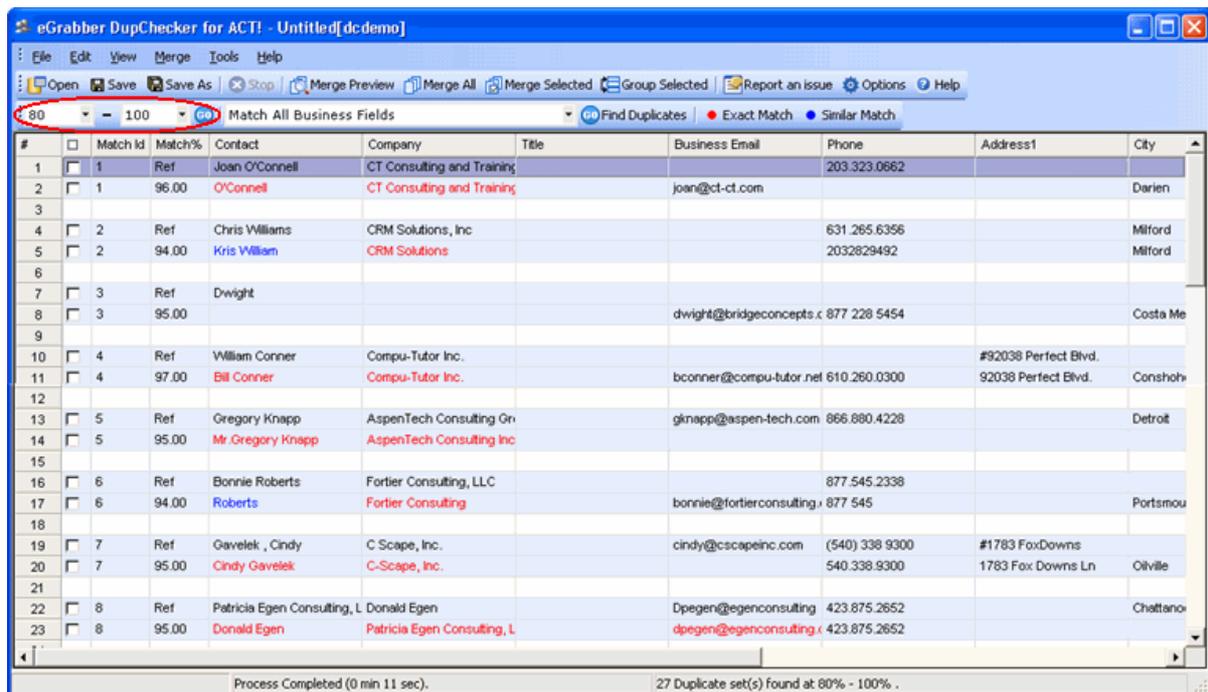


Figure 6: DupChecker with the duplicate records

- 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.

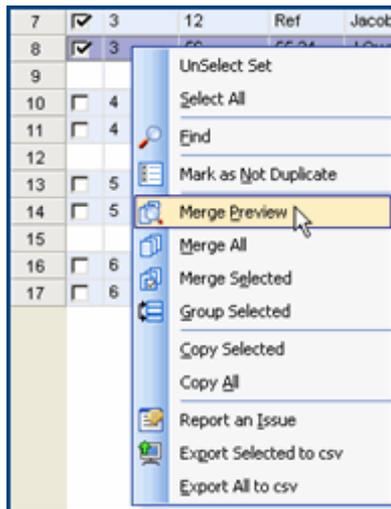


Figure 7: Merge Records

- Right click the grid and select **Merge Preview**.
- Merge Preview window, as shown in [Figure 8](#), 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.

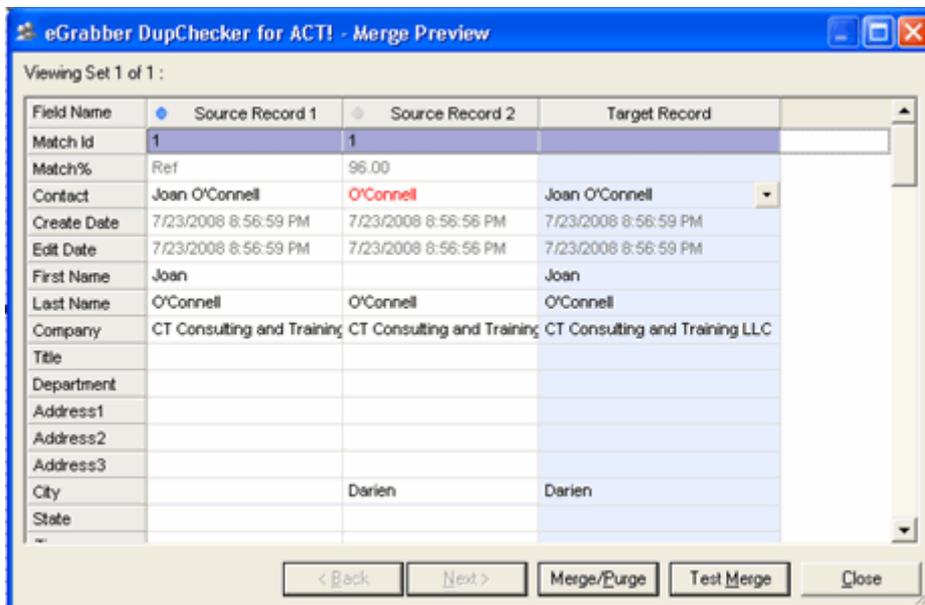


Figure 8: Merge Preview window

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](#).

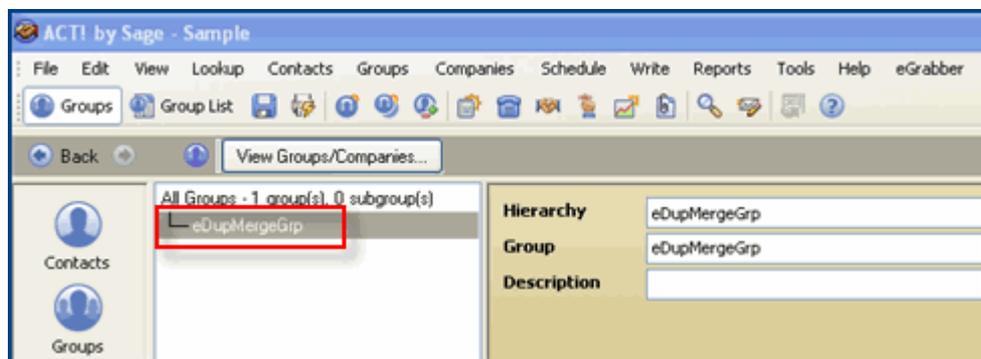


Figure 9: Merged Group in ACT!

Group duplicate records in ACT!

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

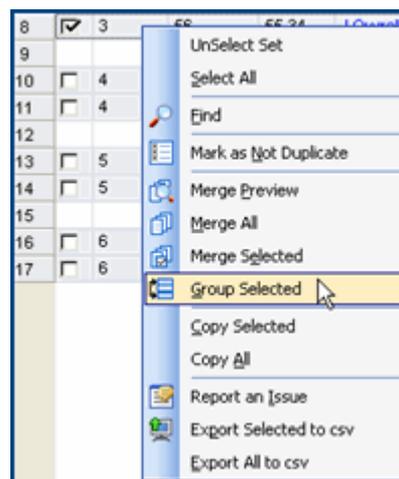


Figure 10: Grouping duplicate records

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



Figure 11: Select or Create a group

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

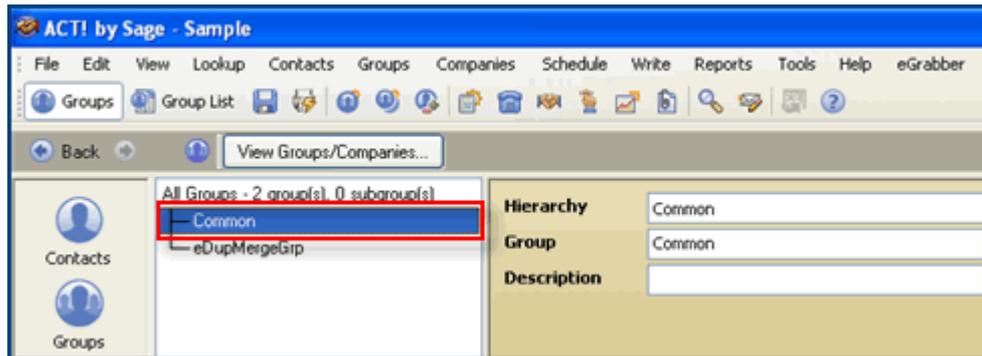


Figure 12: Records added to new group

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 → Programs → eGrabber DupChecker for ACT! → 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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