History Cleanup Wizard for Act!

Usage:

1. Open Act! and switch to the CONTACT LIST view, GROUP LIST view, or COMPANY LIST view.
2. Make sure you have a backup of your Act! data base that you would be comfortable going back to. If you are not sure if you have a good back go ahead and make another one now.
3. Do a lookup of the Contacts, Companies, or Groups you want to process. If you want to process all records of a given type, do a Lookup/All Contacts, Lookup/All Companies, or Lookup/All Groups respectively.
4. Click on Tools and then the History Cleanup Wizard menu item.

File   Edit   View   Lookup   Contacts   Schedule   Write   Reports   Tools   Help   Synchronize Now   Disconnect from LinkedIn®

Sage ACT!

Back   Forward

To-Do   Note   Search   Go

Contacts «

Lookup

Contact Field:

Contact

Contains:

Go

More Options...

Related Tasks

View All Contacts
Export to Excel

Detail View   List View

Edit Mode   Tag Mode

Selected   Options ▼

Tools menu:

Spelling...   Alt+F7

Define Fields...

Design Layouts   ▶

Design Dashboards...

Manage Users...

Manage Teams...

Password Policy...

Database Maintenance   ▶

Convert ACT! 3.0 - 6.0 Items...

Scan for Duplicates...

Copy/Move Contact Data...

Export to Excel

Update Salutation Field...

Synchronize Database   ▶

Synchronize with Outlook   ▶

Integrate with Google   ▶

Social Updates   ▶

Set Up Offline Smart Tasks...

ACT! Scheduler...

Sage ACT! Scratchpad

Timer...

Accounting Integration Setup

Remove Accounting Integration

Customize   ▶

Preferences...

History Cleanup Wizard

		Company		Title	Address 1	City	State	ZIP
	🔒	Ace Pet Store Franc		Proprietor	925 Cabby St.	Eugene	OR	97
	🔒	Ace Pet Store Franc		Owner/Operator	925 Cabby St.	Eugene	OR	97
	🔒	Ace Pet Store Franc		Buyer	925 Cabby St.	Eugene	OR	97
		ACT! User Commun						
	🔒	American Dreams		Marketing Director	1113 Grainey	Allen	TX	75
	🔒	American Dreams		Vice President of Pro	1113 Grainey	Allen	TX	75
		AVB Enterprises		CEO	9088 East Houston	New York	NY	10
	🔒	Beautiful Friendship		Owner	13 Rue St Ferreol	Marseille		13
	🔒	Beautiful Friendship		Investor	13 Rue St Ferreol	Marseille		13
	🔒	Beautiful Friendship		Finance	13 Rue St Ferreol	Marseille		13
	🔒	Best Lender Financi		Sales Manager	4500 Payment Way	Currency	IL	60
	🔒	Bick's Longhorns			Two Cavalry Row	Marfa	TX	79
	🔒	Bick's Longhorns			Two Cavalry Row	Marfa	TX	79
		Black Forest Baking		Manager	Grafenburger Allee 1	Mnchen		98
	🔒	Bodega's Bodacious		Imports	915 Highway One	Bodega Bay	CA	94
	🔒	Bodega's Bodacious		President	915 Highway One	Bodega Bay	CA	94
	🔒	Boomers Artworx		Owner	Mile End Road	Whitley Bay	North Tyneside	NE
	🔒	Boomers Artworx		Vice President	No Place	Newcastle upon Tyr		NE
	🔒	Boomer's Artworx		Sales Representativ	8907 E. Rosebud La	Scottsdale	AZ	85
	🔒	Boomer's Artworx		Sales Representativ	8907 E. Rosebud La	Scottsdale	AZ	85
	🔒	Brandee's Bakery		Manager	41169 Alec Lane	Boise	ID	83
	🔒	Brandee's Bakery		Owner	41169 Alec Lane	Boise	ID	83
	🔒	Brock, Lathers and		Plastic Surgeon	FLC Lane		Atiu Island	
		Brushy's Golfing Wo		Chief Golf Sales Mar	Level 36 989 York S	Sydney	NSW	20
		Burley Internet Comr						
	🔒	Cadbury		Founder	Cadbury Trebor Bas	Birmingham		B3
	🔒	Captains of Industry		President	PO Box 270514	Houston	TX	77
	🔒	CH Gourmet Coffee		Public Relations Mar	13 East 54th St.	New York	NY	10
		CH Gourmet Coffee	Fred Fenderline	Fred Fenderline	President	50c Rothbury Tce	London		EC
		CH TechONE	Ernst Anderson	Ernst Anderson	Vice President of US	13 East 54th St.	New York	NY	10
		CH TechONE	Betty Browser	Betty Browser	Sales Representativ	13 East 54th St.	New York	NY	10

🏠 Welcome

Connections

Contacts

Groups

Companies

Calendar

Task List

Opportunities

Reports

Dashboard

Search

Lookup: All Contacts

Chris Huffman

You will get a dialog box to confirm your action and to specify processing options.

History Cleanup Wizard for Act!

History Cleanup Wizard will delete histories matching the following criteria. See the help file for a complete description of the interaction of these filters.

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We are processing the current Contact List

Date Range

◉ Histories Start Date Earlier Than ...   8/28/2013 ▼

◉ Histories Start Date Between These Two Dates ...

From: 8/27/2013 ▼   To: 8/27/2013 ▼

Version 1.0.0.8

History Types (you must select one or more)

Field Changed ▼

Record Managers (you must select one or more)

Allison Mikola, Chris Huffman ▼

☐ Only delete Histories having the following in their "Regarding".

☑ Only delete Histories with having following in their "Details".

Record Manager

[Help]   [Yes, continue]   [No, cancel]

There are five levels of filtering that will be applied to the history records connected to the Contacts, Companies, or Groups in the list being processed. A History record will be deleted ONLY if it passes all five filtering levels. The levels of filtering are as follows:

1. The recorded History Start Date must be in the specified Date Range. There are two ways to specify the date range:
   a. Select the "Histories Start Date Earlier Than…" button and then specify one date value. This will select History records recorded earlier than that date.
   b. Select the "Histories Start Date Between These Two Dates …" button and then specify a from date and a to date in the two date boxes.
2. The History Type must be one of the ones selected in the History Type dropdown list. The dropdown list allows you to quickly select All History Types, or No History Types by selecting None, and then checking or unchecking the check boxes next to the History Type names in the list. Selected History Types have the check box checked. The visible box will contain the words All or None if All History Types or No History Types are selected, the one or two History Type names if just one or two are selected, and the word Multiple if more than two (but not All) History Types are selected. The default is for No History Types to be selected to require you to specify the History Types you want deleted.
3. The Record Manager of the History record must be one of the ones selected in the Record Managers dropdown list. The dropdown list works like the History Type list as described above. The default is for just you (the currently logged on Act! user) to be selected.
4. Optionally you can filter on a word or phrase in the Regarding field of the History record. Check the box "Only delete Histories having the following in their Regarding" and then type the word or phrase in the entry box below the check box. The word or phrase may appear anywhere in the Regarding field.
5. Optionally you can filter on a word or phrase in the Details field of the History record. Check the box "Only delete Histories having the following in their Details" and then type the word or phrase in the entry box below the check box. The word or phrase may appear anywhere in the Details field.

The filtering checks for some nonsensical situations and will give you one or more error messages if you click "Yes, continue". You will need to correct the errors if you want to continue. Here are the checks made:

1. If you are using the Between Two Dates option, the date in the from box must be earlier than or equal to the date in the to box.
2. You must select at least one History Type. If History Type is showing None you will not be allowed to continue.
3. You must select at least one Record Manager. If Record Manager is showing None you will not be allowed to continue.
4. If you checked the filter on Regarding check box but the text entry box is blank you will not be allowed to continue.
5. If you checked the filter on Details check box but the text entry box is blank you will not be allowed to continue.

Here are some tricks on the filtering.

1. To process all History records regardless of date, choose the "Histories Start Date Earlier Than …" option and then set the date box to Tomorrow. This is the default.
2. To process History records that were recorded only on one date, choose the "Histories Start Date Between These Two Dates …" option and then set both date boxes to the same date – the date you want to process.
3. To process Histories recorded by Swiftpage emarketing select the History Type of "E-mail Sent" and then filter on the word Swiftpage in the Regarding field.
4. To delete Histories where the Swiftpage emarketing was never opened, select the desired date range, select History Type of "E-mail Sent", select All Record Managers, and then filter on the word Swiftpage in the Regarding field and Clicks=00 in the Details field.

When you are ready to process the selected records and delete the selected History records, click "Yes, continue".

You will now see a progress box. If you change your mind during the process, click Cancel. However, History records that have already been deleted will not be rolled back.

A final box will show you the results of the operation.

History records have been deleted as requested.