# Duplicate Remover Wizard Expert
## for ACT! by Sage

# Help Document

Patricia Egen Consulting

**Table of Contents**

## Introduction

Welcome to the Duplicate Remover Wizard Expert for ACT! 2008-2013 and V16.



This wizard will merge duplicate contact or company records in an ACT! 2008-2013 or V16 data base. You pick the fields you want to have ACT! validate for duplicates and the tool will do the rest of the processing.

The features of the program are as follows:

- Process all contacts in your data base or just the members of a specific group.
- Process all companies in your data base.
- Specify up to 6 fields to be used to match records to find duplicates.
- Specify whether records where one or more of the match fields are blank are to be ignored.
- Specify whether the matching is to be exact characters or to be fuzzy matching.
- Specify whether the most or least recently modified record is the record that will be retained in full.
- Selectively exclude records from the potential matches found by the program.
- Merge fields from records to be deleted into blank fields in the record that will be retained.
- If a non-blank field that is different than the value that is being kept is present in some field in a record to be deleted, make note of that field and value in a note attached to the record that will be retained.
- For contacts:
  - Move all subsidiary data (Notes, History, Activities, Opportunities, Secondary Contacts, and Documents) to the retained contact.
  - Retain Company Links as contact records are merged.

- o Retain Company static membership as contact records are merged.
- o Retain Group static membership as contact records are merged.
- o Merge custom table records to the retained Contact.
- For companies:
  - o Retain the dynamic criteria if present in one of the company records being combined.
  - o Retain static Contacts.
  - o Retain static Opportunities.
  - o Retain linked Contacts.
  - o Merge Notes and Histories (Notes and Histories that are related to a Company record but not related to a Contact record).
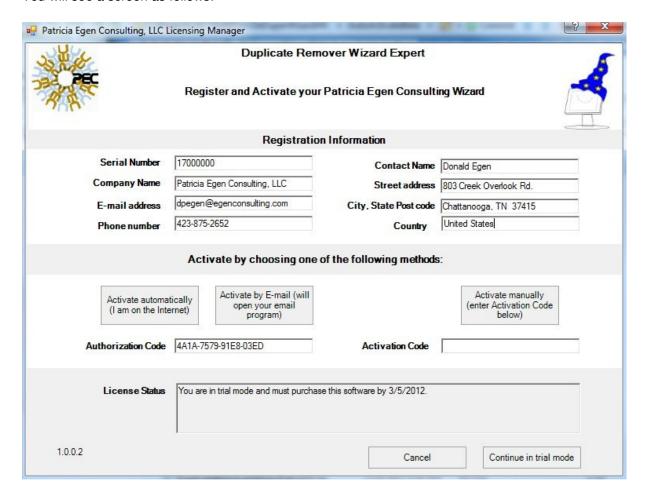  - o Merge custom table records to the retained Company.

System Requirements:

- ACT! or ACT! Premium 2008 (10.0.2) to 2013 or V16

**Installation and Activation**

Installation is a self-installing file.

After installation, you may run the program in trial mode, or you may activate the program to your machine.

You will see a screen as follows:



All Registration Information fields are required.

To run in trial mode for 15 days, click the "Continue in trial mode" button at the lower right. In trial mode the duplicate scanning and matching processing is fully functional but the duplicate merging phase will stop after merging two sets of duplicates.

If you are connected to the Internet, the program will automatically activate by clicking the "Activate automatically" button after filling in all the registration information and your serial number.

If you are not connected to the Internet but can eventually send an e-mail message, fill in all the registration information and click the "Activate by E-mail" button. Your email program will open with a pre-formatted message containing the registration information addressed to our Activation e-mail box (activate@egenconsulting.com). Save and send the e-mail message when you are able to. We will process your registration and return an Activation Code by return email.

When you get the returned e-mail message with your Activation Code, start Duplicate Remover again and you will be returned to the Registration and Activation screen. Enter the Activation Code (exactly as provided to you in the email) in the Activation Code box and click the "Activate manually" button to enter the Activation Code. You will then be fully registered.

When registration is successful you will get a message like the following indicating that you are complete.



If you want to return to the Licensing Manager screen to display your serial number or review any of the other licensing information, just double-click any Duplicate Remover Wizard screen at the bottom of the screen between the "Help" and "Back" buttons.
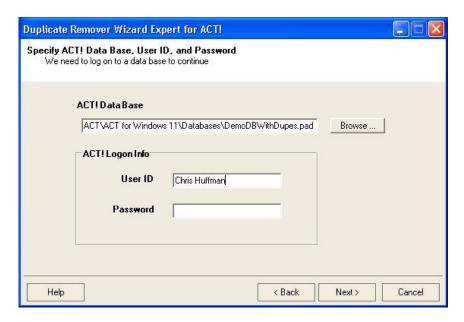
**Finding your Serial Number**

If you need to see the Licensing Manager screen to display your serial number or review any of the other licensing information, just double-click any Duplicate Remover Wizard screen at the bottom of the screen between the "Help" and "Back" buttons.

### Using the program

The duplicate wizard program can be launched from either Start – Programs in the Patricia Egen Consulting folder or from Windows Explorer by going to the Program Files\Patricia Egen Consulting\Patricia Egen Consulting Duplicate Remover folder and double-clicking on the duplicatewizard.exe icon.

### Locating the ACT Database

The first screen shown will allow you to choose the database to de-dup and enter a username and password.
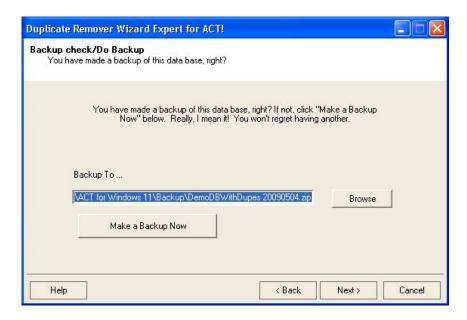


To select a database, select an ACT! PAD file. Use the "Browse" button to rummage through your file system.

Logging on to a database requires a valid User ID and, if required for the user ID, the matching password. The user should be a Manager or Administrator-level user.

Click "Next" to proceed to the next screen. Click "Cancel" to exit the Wizard. If you give an incorrect PAD file, incorrect User ID, or incorrect password, you will get an error box, and you will be returned to the previous screen to try again.

### Backing up the ACT database from within Duplicate Remover Wizard

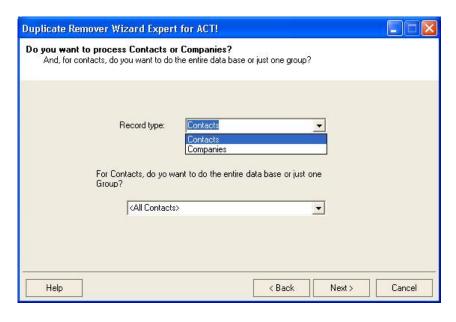Make sure you have backed up your database.

You can make a backup from this screen. Take the default or use "Browse" to name the file to receive the backup, then click "Make a Backup Now" to make a backup. You will be glad you did.

Click "Next" to proceed to the next screen. Click "Cancel" to exit the Wizard.

### Choosing whether you are de-duping contacts or companies

You can de-duplicate contacts or companies in one run of Duplicate Remover Wizard Expert.  To process contacts, select "Contacts" in the upper dropdown box. Select "Companies" to process companies.
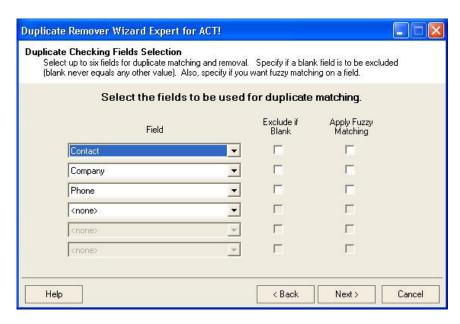


If you want to process contacts, you can process all Contacts in your data base by using the default selection of "<All Contacts>" in the lower dropdown box, or you can just process the members of one group in your data base.

If you choose to process the members of one group, ONLY those contact records will be searched looking for duplicates. Other records in the data base will not searched. This may cause some duplicates to be missed.

There is no choice but to process all companies if you want to process companies. However, you can exclude selected companies individually on the "List of duplicates" screen later.

Click "Next" to proceed to the next screen. Click "Cancel" to exit the Wizard.

**Choosing Fields for duplicate validation**



This screen defaults to the fields defined in the ACT! database as the duplicate checking fields (set in Tools/Preferences/Duplicate Checking for Contacts or Companies, respectively).

If you want to use different fields, or more than the 3 fields you can set as duplicate checking criteria in ACT!, to do duplicate matching, select them here.

For each field selected, you can choose to ignore records that have no data in that field. Just select the check box to the right of the field dropdown. If the check box is selected, records where that field is blank will be ignored. If the check box is not selected, then a blank field is just one possible data value of that field.

- If blanks are ignored, this has the effect that no two blank values can match each other.
- If blanks are not ignored, then every blank matches every other blank in that field.

**Fuzzy Logic Validation**

Also, you can specify for each field whether to use exact character matching (the default), or to do fuzzy matching. Just select that check box to the right of the field dropdown to specify fuzzy matching for that field.

Some notes on the fuzzy matching process:

- Fuzzy matching of character data uses a variant of the Soundex algorithm. This can cause lots of false matches, particularly when applied to multi-word strings such as the full Contact name.
- Fuzzy matching of telephone numbers returns just the sequence of numbers without any punctuation or spaces.
- Fuzzy matching of dates, times, and email addresses is the same as not-fuzzy matching for those field types. No special processing is done for those field types.

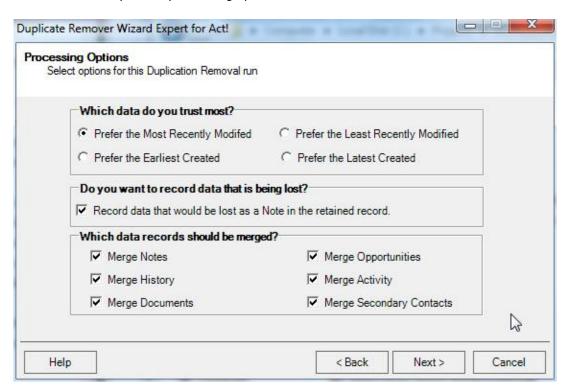Some suggestions on using the fuzzy matching:

- Do not do fuzzy matching on a field without also specifying "Exclude if blank" or you may get many records where you do not have complete data all combined into one record.
- Do not do fuzzy matching on every field you are matching on, unless one of them is a telephone number or email address.
- To avoid too many false matches do fuzzy matching on First Name and Last Name rather than Contact name.
- Use the "Exclude" function in the "List of Duplicates" display to exclude matches you know are wrong if you are using fuzzy matching but do not have too many duplicates to effectively scan by eye.

Some additional suggestions are discussed on the "List of Duplicates" page of this documentation.

Click "Next" to proceed to the next screen. Click "Cancel" to exit the Wizard.

**Processing Options**

The next screen specifies processing options.



Select whether you want to retain the data in the most recently updated duplicate (the default and the suggested approach for general duplicate removal), least recently updated duplicate, in the earliest

created duplicate, or the most recently created duplicate (the suggested approach where you may have just done an import of data and want to merge it with your existing data).

Select if you want data from fields that would be lost by the Duplicate Removal process (because the data is in a duplicate record to be deleted and the field already has data in it from another record) to be saved as a Note in the surviving contact or company record. The default is Yes.

Select which data records (Notes, Histories, etc.) are to be moved to the retained record. The default is all. This is recommended unless you know there are duplications here that you do not want to keep.

Click "Next" to proceed to the next screen. Click "Cancel" to exit the Wizard.
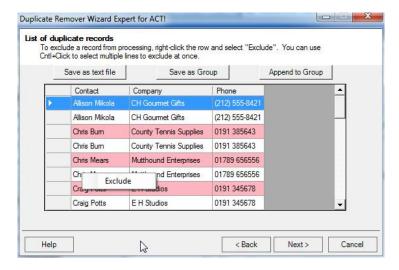
### Showing how many duplicates were found



Based on the defined duplicate checking fields, this screen shows the count of duplicate contact or company records found by scanning the database.

If you continue to the following screens in the Duplicate Wizard, these are how many records that will be processed.

If you disagree that there are this many duplicate records in your database, click "Cancel" or "Back" here and try again with revised duplicate checking fields.

Click "Next" to proceed to the next screen. Click "Cancel" to exit the Wizard.

### Showing the List of contact names found

This screen shows a list of the duplicate records found.

The columns displayed are the fields selected for duplicate matching, and in the order specified.

The rows bring the records found to be duplicates together. The pink-tinted row is the first row of a group that matches. The white-background rows below the pink-tinted row are the records that match the pink-tinted row.

You can do several things on this screen:

- You can right-click a line (anywhere on it) and click "Exclude" from the menu that pops up. This will exclude that record from ANY further processing. You can highlight multiple rows with Control-left-click, then right-click and select "Exclude" to exclude multiple rows at once.
- You can save the current columns and row values to a simple columnar text file by selecting the "Save as text file" button. A dialog will come up prompting for a file name and a directory in which to save the file. You can then view, print, or otherwise look at the records that would have been selected for deduplication.
- If you are processing contacts, you can save the current list of contacts as a group by selecting the "Save as group" button or append to an existing group by selecting the "Append to group" button. A box will pop up prompting for a Name for the group. The list will be saved or appended as a group with that name and a description of "Duplicates found on " and the date and time. Sorry, there is no way of saving a list of Companies other than by printing them out.

  An additional option with either group function is to save a tag value in a selected field in each contact to tag the actual contact records that have been matched. This will allow you to see the matches that were found so you can decide if they are reasonable matches or not. This function is controlled by the dropdown box in the Save as or Append to pop-ups. If the field name selected is "<none>" then this action will not happen. The suggestion is to use a user field (User 1 through User 10) that you are not currently using for this tag. Note that any existing data in the selected field will be overwritten on the duplicate records by this function and will not be recoverable.

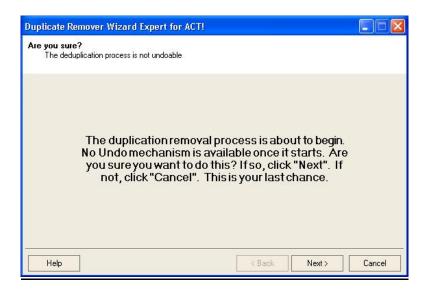- Of course you can click "Next" to go to the next page and continue with the duplicate removing process.

These options allow a variety of strategies for reducing duplicate contacts. For example:

- Do a fuzzy scan of the entire data base with "First Name", "Last Name", and "Company" to get a candidate list of contacts to examine. Save this list as a group. In ACT!, open that group and

convert it to the current lookup. Add additional columns to the contact list. Use "Edit Mode" to do some data clean up. Exclude records you know are not duplicates. Save the current lookup as another group. Rerun Duplicate Remover Wizard and start with that group. Select different or additional columns to narrow down the matches of actual duplicates. Repeat the process if necessary to further refine the matches.

Click "Next" to proceed to the next page. Click "Cancel" to exit the Wizard.

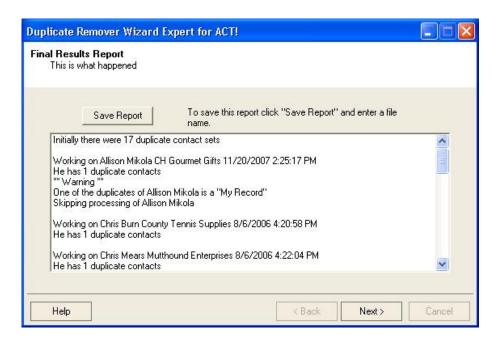## Starting the de-duplication process



This screen is your last chance to back out. We are loaded, we are locked, and are ready to fire.

If you click "Next" on this screen, the duplicate merging and removal process will begin. A progress box will allow the process to be cancelled in the middle, but work on records already processed cannot be undone by this Wizard. The only way back is by restoring a backup made before running this Wizard.

You did make a backup before starting, right?

Click "Next" to proceed to the next screen. Click "Cancel" to exit the Wizard.

## Final Results Report

This screen shows each duplicate contact processed, and the number of duplicate records merged into the contact record that was kept.

Any errors during the process will also be listed on this screen.

Of particular interest is if a set of duplicate contact records included a contact record representing a user of ACT! (a "My Record" in ACT! terminology). These duplicates cannot be processed by Duplicate Remover Wizard. Use the normal Tools/Scan for Duplicates function in ACT! itself to process these records after you are done with Duplicate Remover Wizard.

To save the message list to a file, use the "Save Report" button at the bottom left of the screen.

Click "Next" to proceed to the next screen. Click "Cancel" to exit the Wizard.

You are done with the Duplicate Remover Wizard.

Click "Finish" to exit the Wizard.

Copyright 2006-2009 Patricia Egen Consulting, LLC

Portions based on source code originally Copyright 2001-2003 by Alex Kucherenko, ELEKS Software Ltd.