Purge History

v.5.0

for ACT! 2006

Another efficient and affordable ACT! Add-On by

e×ponenciel

Table of content

Purpose of the add-on

Purge History allows to purge contact, company or group history items based on their type, the record manager, their date or the content of their regarding field so that you do not get clogged with useless history records.

Installation procedure

Download the program file from our <u>download page</u> and double-click it to start the installation.

An icon should have been added to your contact , company group toolbars to launch Purge History directly from within ACT!. (If it is not the case, please see Know issues below).

Note that contrarily to versions supporting previous ACT! versions and because of the changes in ACT!, add-ons are now DLL files and not executable files. This means that they are automatically initialized by ACT! when placed in ACT! plugin folder (a subfolder of the main ACT! directory) and cannot be started from the Windows Start menu anymore. This is why you are not given a choice of installation directory during the installation process.

ACT! should automatically add an icon to the Contact Detail window and an item to the Tools menu. Icons and menu items are now the only ways to start your Exponenciel add-on.

Known issue

If icons are missing in a particular contact, company or group view, do a right-click on the toolbar and choose Customize. Make sure all items are checked. Then close the window. Repeat in all views where you are missing an icon. Then re-start ACT! The icons should now be there.

Purging history records

If you want to purge contact history records, launch the program from one of the contact views. If you want to purge company history records, launch the program from one of the company views. If you want to purge group history records, launch the program from one of the group views.

The Purge History wizard has four screens.

In the first screen, you select the types of histories you want to purge.

In the second screen, you select the record managers of the history records you want to purge.
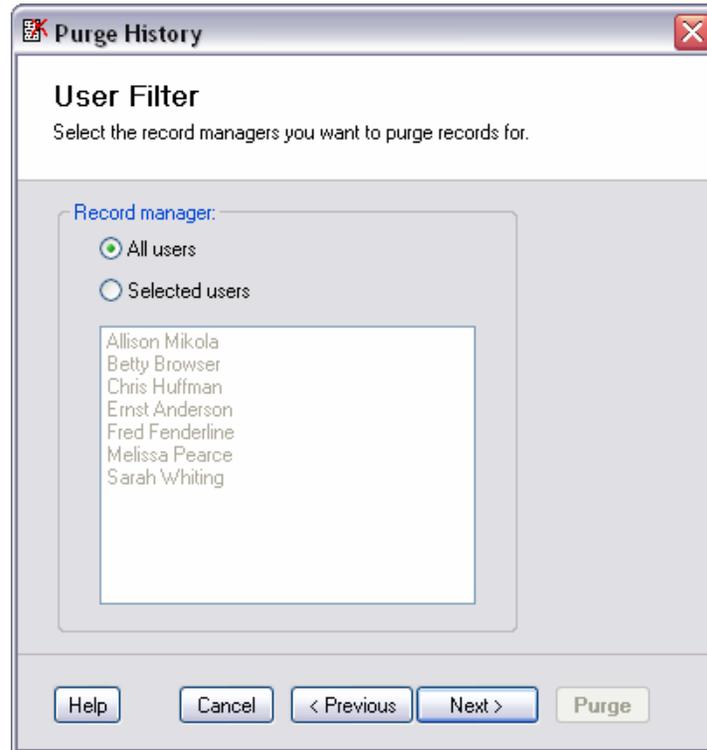
Purge History

User Filter

Select the record managers you want to purge records for.

Record manager:
- ● All users
- ○ Selected users

  Allison Mikola
  Betty Browser
  Chris Huffman
  Ernst Anderson
  Fred Fenderline
  Melissa Pearce
  Sarah Whiting

[Help] [Cancel] [< Previous] [Next >] [Purge]

In the third screen, you select the dates of the history records you want to purge. If you want to use an additional condition on the Regarding field, type the word or sequence of words you want the history records you want to purge to start with or contain.

Purge History

Dates and Regarding Filter

Set additional conditions history records have to meet to be purged.

Date:
- ● All dates
- ○ The following date range:

  [_____] [Edit...]

Regarding field:
- ● Starts with:
- ○ Contains:

  [_____]

[Help] [Cancel] [< Previous] [Next >] [Purge]

NOTE: *If you want to purge History records which Regarding field is blank, select the Contains option and type <BLANK> in the textbox.*

In the final screen, you define if you want to run the purge for the current record, current lookup or all records.
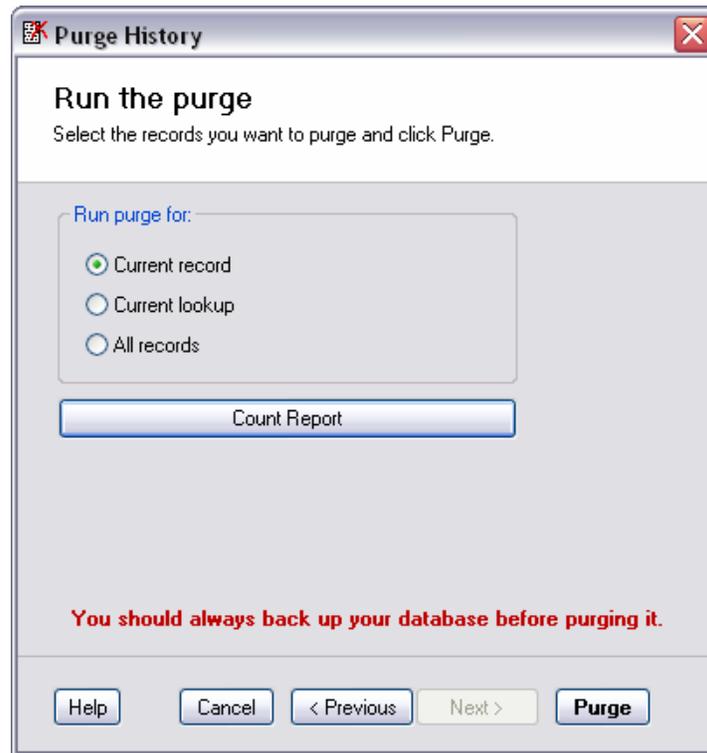
NOTE:
If launched from the Contact detail screen, the current record option is disabled. If launched from the Company detail or Group detail views, Purge History only offers the ability to purge the current record. If launched from the Company list or Group list, Purge History only offers to purge the current lookup.

The Count report button allows to get a count of the number of records which are going to be purged, by type.

Make sure you backup your database before clicking the purge button. Purges can not be reversed.

Log

All purge operations are logged under the Log.txt file located in the Exponenciel\PurgeHistory folder located under the ACT! plugins folder. It can be viewed with any text editor.

Registering your product

To continue using your product passed the trial period, please buy a license at www.exponenciel.com. Licenses are issued for one ACT! username and will only work for that username.

Once you get a license, run the program and in the trial screen, press the Register… button or in the Purge History main screen, press the Help button and choose About… in the popup menu. Once the About screen is open, type the registration code in the appropriate box and click OK.

Support

For support, contact support@exponenciel.com.

Rev. September 21, 2005 – v. 5.0