Another efficient and affordable ACT! Add-On by

exponenciel

Purge Notes & History

v.6.0

for ACT! 2008/9

Table of content

Purpose of the add-on

Purge Notes & History allows to purge contact, company or group notes or 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 download page and double-click it to start the installation.

An icon should have been added to your contact , company group toolbars to launch Purge Notes & History directly from within ACT!.

Purging records

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

The Purge History program consists of a wizard.

In the first screen, you select whether you want to purge notes or history records.

If you choose history records, the next screen allows you to select the types of histories you want to purge.

In the following screen, you select the record managers of the note or history records you want to purge.

In the following screen, you select the dates of the 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.

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.
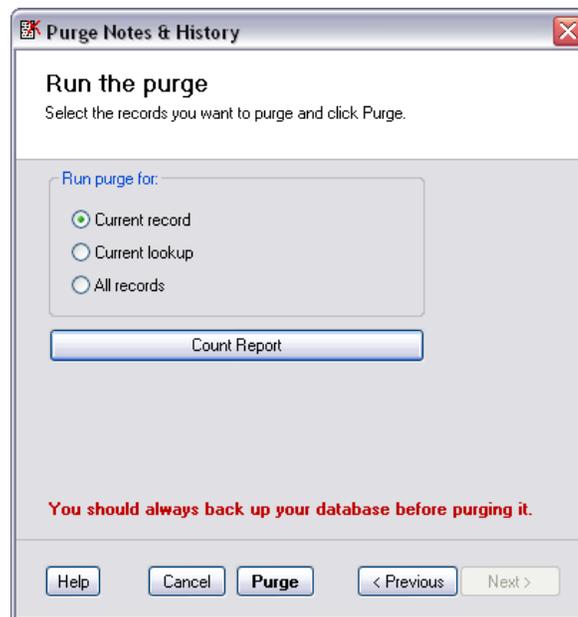
NOTE:
If launched from the Contact detail screen, the current record option is disabled. If launched from the Company detail or Group detail views, Purge History only offers the ability to purge the current record. If launched from the Company list or Group list, Purge History only offers to purge the current lookup.

The Count report button allows to get a count of the number of records which are going to be purged, by type.
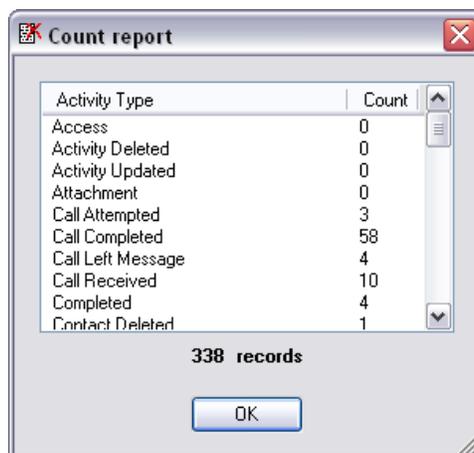
Make sure you backup your database before clicking the purge button. Purges can not be reversed.

Log

All purge operations summary and errors are logged in a text file. At the end of the purge process, you will be asked whether you want to see the content of log file or not.

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. May 13, 2009 – v. 6.0