



# BatchUpdater4Act

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*Formerly known as "Swiss Army Knife"*

Keystroke.ca

## BatchUpdater

### Installation

1. Download the program at [www.keystroke.ca](http://www.keystroke.ca) go to the website and download the latest trial from the BatchUpdater page on the web store
2. Run the installer and Press **Next**



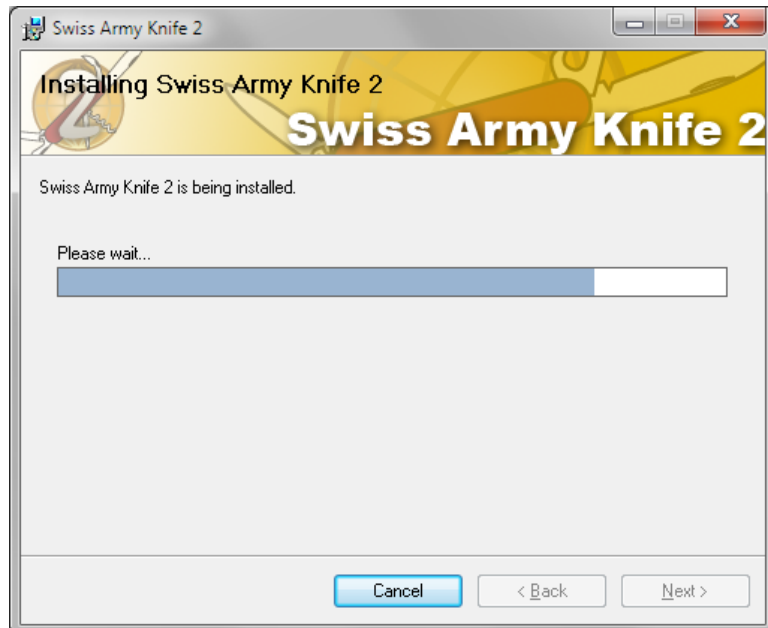
3. Chose a location to install the program and if you'd like it installed for everyone or just your profile. Press the **Next** button when you're satisfied with your settings.



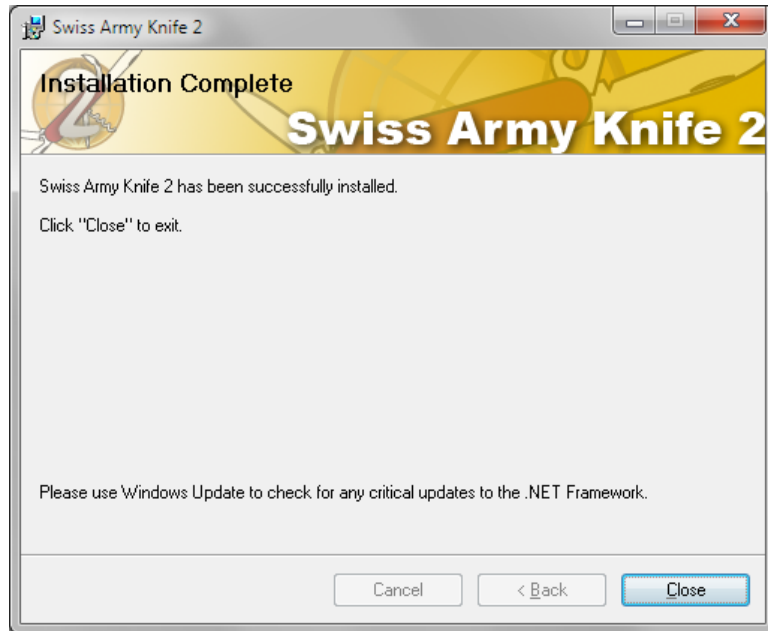
4. Press **Next** on the following screen to start the install install



5. During installation a progress bar will be displayed to show your installation progress.



6. Installation is now complete click **Close** to exit the installer.



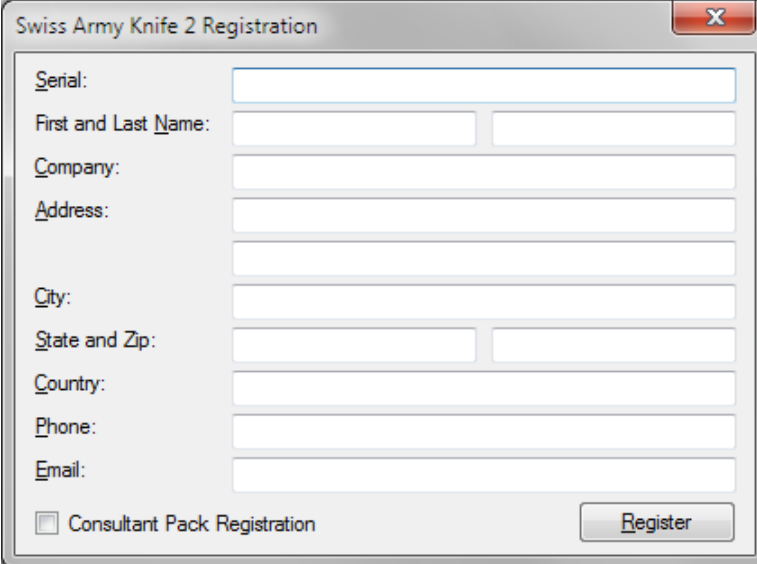
## Registration

1. Start up BatchUpdater (go to Start Menu → All Programs → DesignR1 → BatchUpdater → click on BatchUpdater to open
2. You will be greeted with a Registration screen for the plug-in



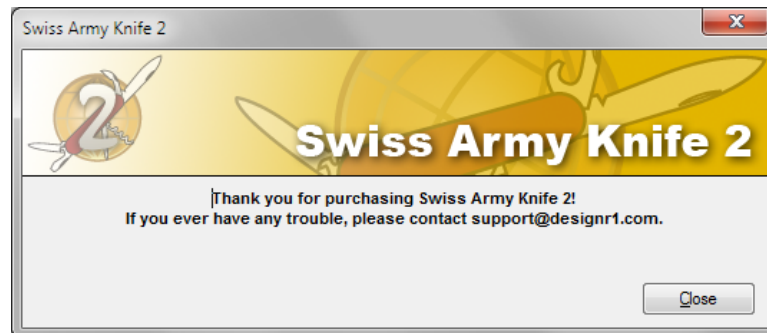
- a. Note: The program starts as a 30 day free trial, if you press **Close** button the registration window will close and you will continue to ACT! with the plug-in in trial mode

3. Press Register and you'll see the following screen



The image shows a registration dialog box titled "Swiss Army Knife 2 Registration". It contains several text input fields for the following information: Serial, First and Last Name (split into two fields), Company, Address (split into two fields), City, State and Zip (split into two fields), Country, Phone, and Email. At the bottom left, there is a checkbox labeled "Consultant Pack Registration". At the bottom right, there is a button labeled "Register".

4. Fill in the Serial and the rest of the registration information and press **Register**
  - a. Note: you must be online to register, it may take a few minutes while your computer contacts our server. If successful a Green message will appear to the Left of the Register button. If the unsuccessful a Red message will appear to the left of the Register Button.
5. Press Close and if you successfully registered the following screen should appear.

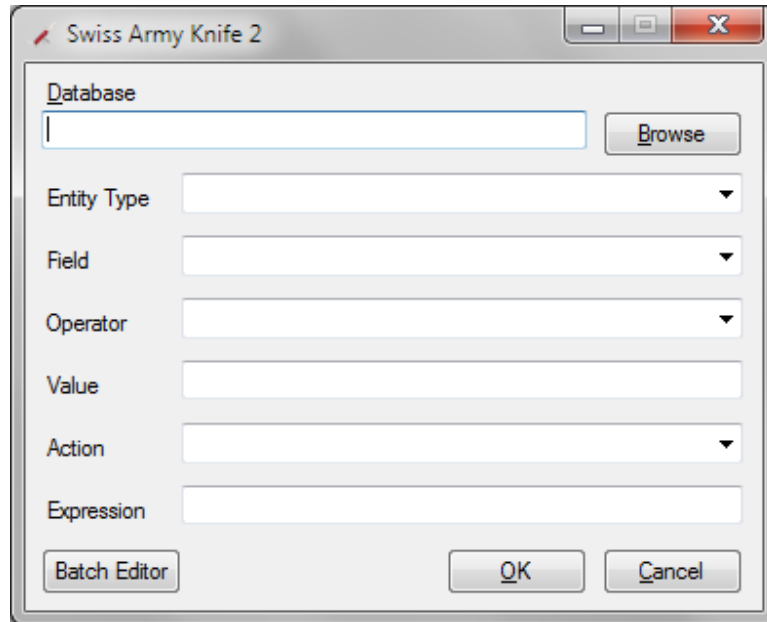


6. Press the **Close** button and registration is complete, BatchUpdater will then start up.

## Features

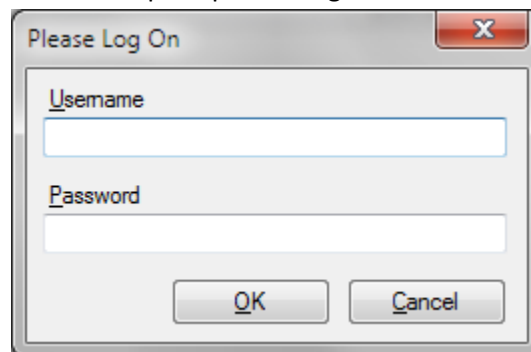
To start BatchUpdater, go to the Start menu → All Programs → DesignR1 → BatchUpdater → BatchUpdater.

**Note:** It is strongly recommended that you backup your data before you run any actions on your database.

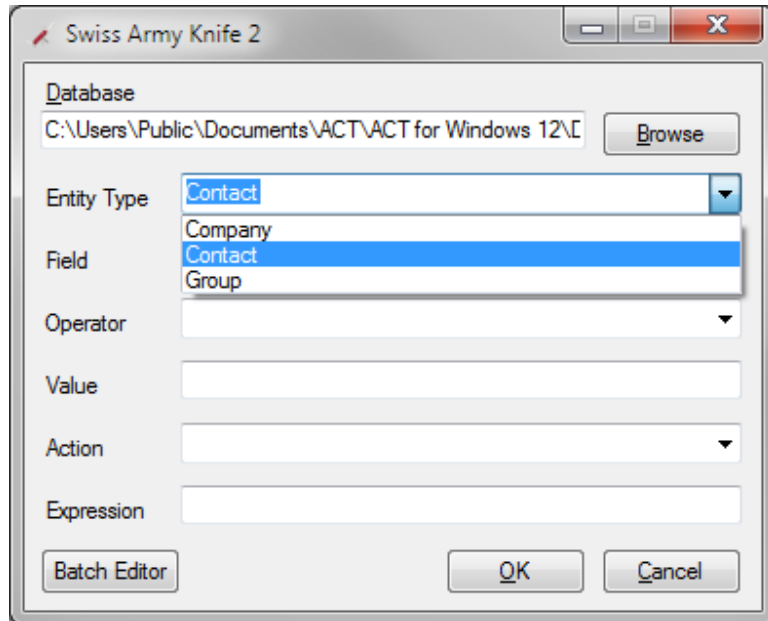


## Single Field

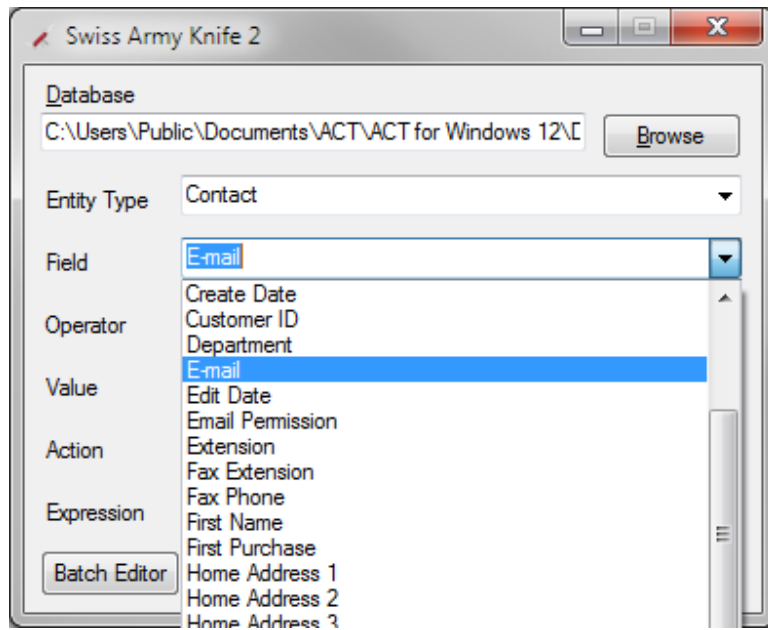
1. Click the "Browse" button and select the database you're working on
2. You will be prompted to log into the database



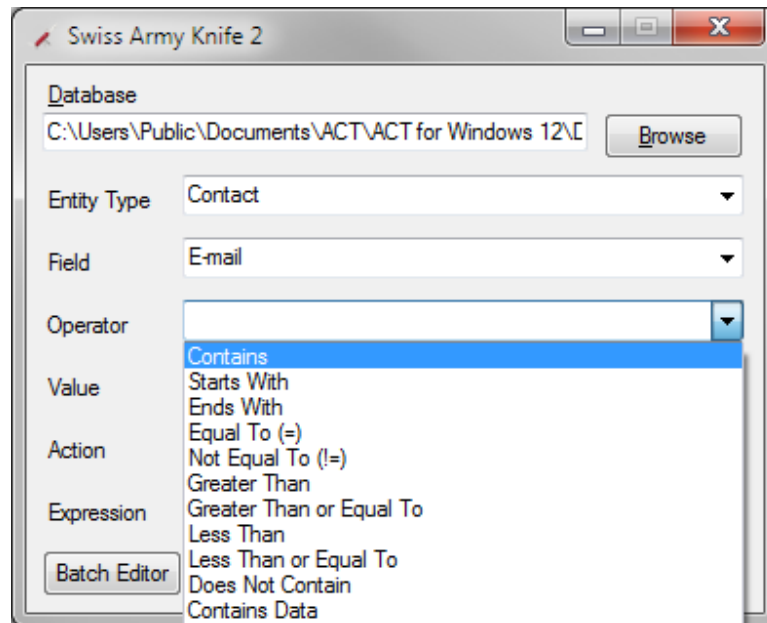
3. Choose from the Entity Type dropdown what Entity you'll be working with



4. Choose the field you wish to query against.



5. Choose your operator (Basic Functions):



- a. Contains – Looks for the value in a particular field
- b. Starts With – the value is at the beginning of the field
- c. Ends With – the value is at the end of the field
- d. Equal to (=) – the value is exactly what is in the field
- e. Not Equal to (!=) – the value does not match the value in the field
- f. Greater Than – for number or date fields to find a number or date that is greater than you're value but not equal to
- g. Greater Than or Equal to – same as above but including the number or date you put in the value field
- h. Less Than – a number or date that is less than but not including the value entered in the value field
- i. Less Than or Equal to – same as less than but including your value
- j. Does Not Contain – records that do not contain the entered value
- k. Contains Data – records where the chosen field is not blank
- l. Does Not Contain Data – records where the chosen field is blank



6. Chose the value to run the operator against (if applicable)

The screenshot shows a dialog box titled "Swiss Army Knife 2". It contains the following fields and controls:

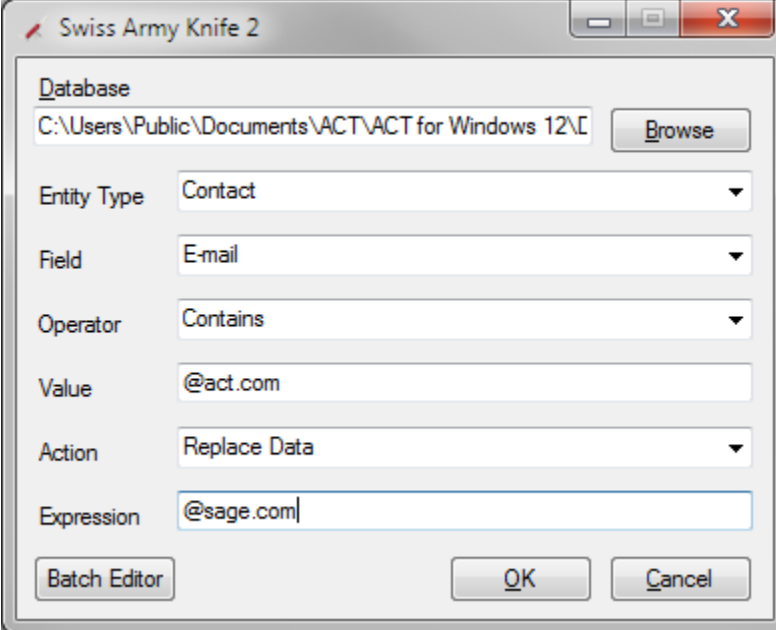
- Database:** A text box containing "C:\Users\Public\Documents\ACT\ACT for Windows 12\[" with a "Browse" button to its right.
- Entity Type:** A dropdown menu with "Contact" selected.
- Field:** A dropdown menu with "E-mail" selected.
- Operator:** A dropdown menu with "Contains" selected.
- Value:** A text box containing "@act.com|".
- Action:** A dropdown menu that is currently empty.
- Expression:** An empty text box.
- Buttons:** "Batch Editor", "OK", and "Cancel" are located at the bottom of the dialog.

7. Choose the action to perform on the records that are retrieved by the query

This screenshot is identical to the one above, but the "Action" dropdown menu is open, showing the following options:

- Replace Data (highlighted in blue)
- Insert Data
- Append Data
- Remove Data
- Replace Data
- Set Field Value
- Delete Entity

8. Choose the Expression to go with the Action.



The screenshot shows a dialog box titled "Swiss Army Knife 2". It contains the following fields and controls:

- Database:** A text box containing "C:\Users\Public\Documents\ACT\ACT for Windows 12\[" with a "Browse" button to its right.
- Entity Type:** A dropdown menu set to "Contact".
- Field:** A dropdown menu set to "E-mail".
- Operator:** A dropdown menu set to "Contains".
- Value:** A text box containing "@act.com".
- Action:** A dropdown menu set to "Replace Data".
- Expression:** A text box containing "@sage.com|".

At the bottom of the dialog, there are three buttons: "Batch Editor", "OK", and "Cancel".

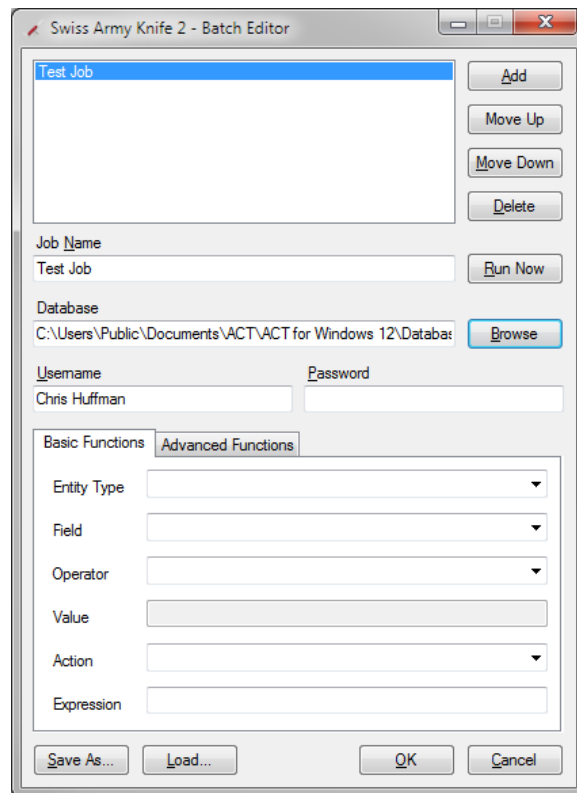
9. Click the **OK** button to execute you're action.  
The example above will take all the emails that have @act.com in them and replace @act.com with @sage.com

## Batch Editor

The batch editor lets you create a file that contains several operations that can be run at the same time.

Click the **Add** button and a new job will be added to the job list

You can then change the job name and choose the database you would like to run the job on. When you select the database using the **Browse** button you will be prompted for your username and password. The username and password you use will automatically be inserted into the username and password fields. All Jobs will be run on the same database if you do not change the database info on each job.

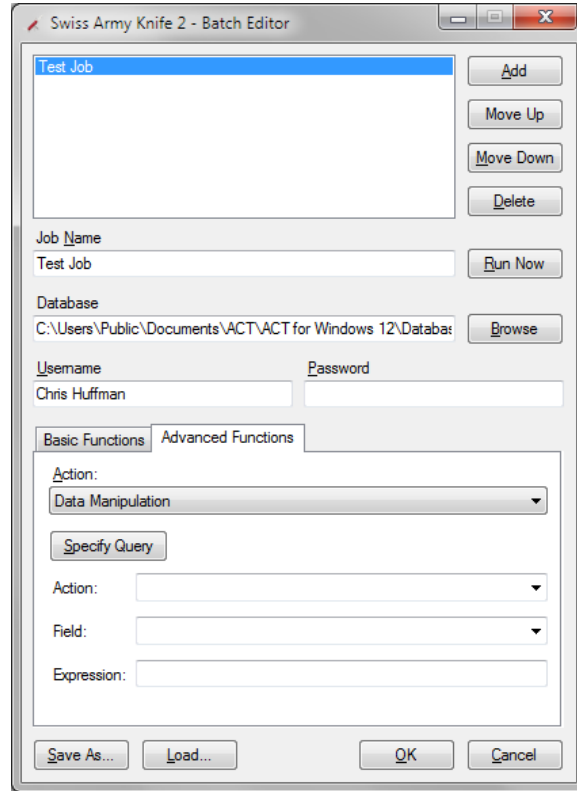


## Basic Functions

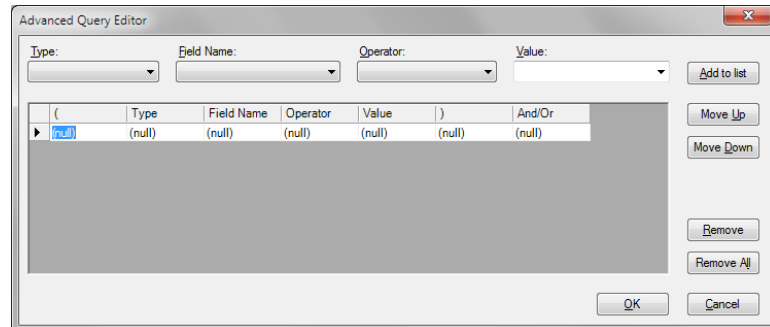
Please refer to the basic functions section for individual jobs.

## Advanced Functions

### Data Manipulation



The Specify Query Button will bring up an advanced query editor



Next choose the Action you wish to run on the Query you specified

Insert Data – adds data into the records you selected

Append Data – adds the selected value onto the end of the data currently in that field.

Remove Data – clears out all data in the selected field

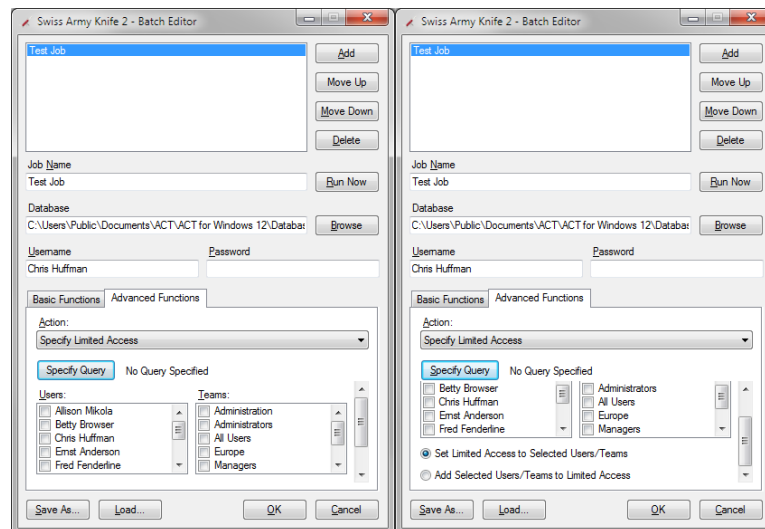
Replace Data – completely replaces the data currently in the field

Set Field Value – Sets the field to a specified value, overwriting anything that is currently there.

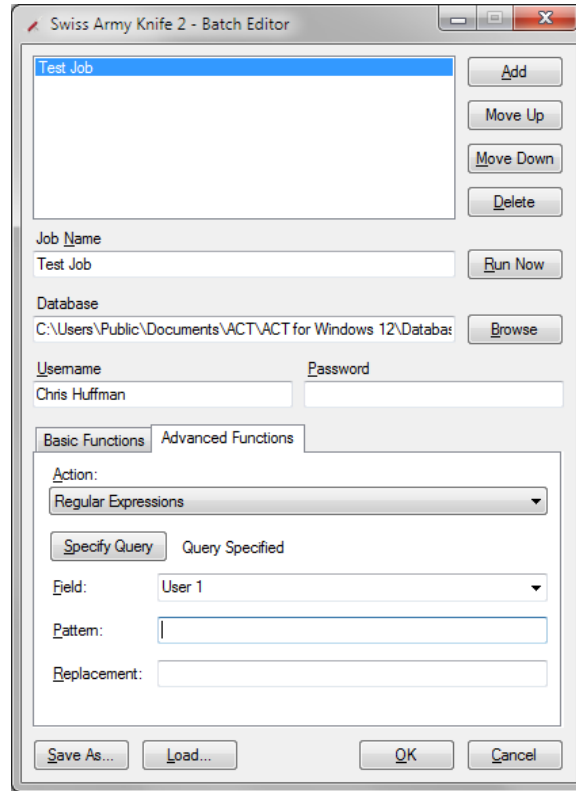
Delete Entity – Will delete a custom entity in the ACT! database

### Specify Limited Access

Allows you either set Limited Access for Selected Users/Teams or Add Selected Users/Teams to Limited Access

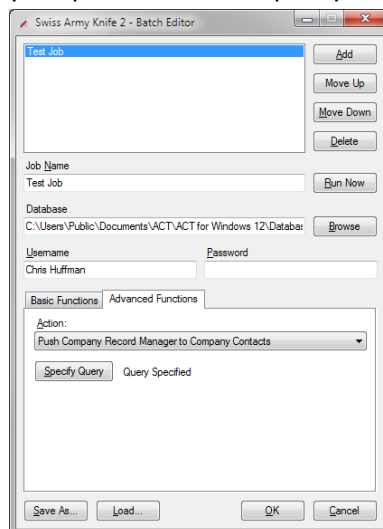


## Regular Expressions

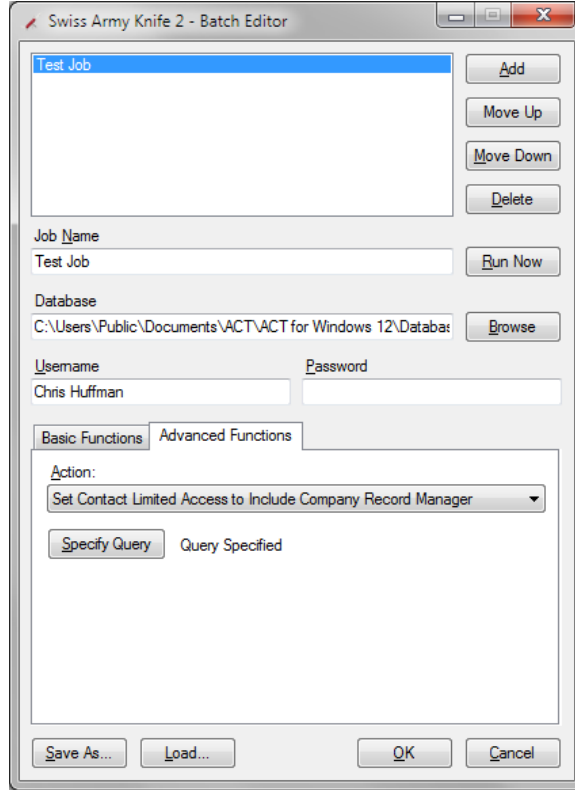


## Push Company Record Manager to Company Contacts

Sets the Company Contacts Record Manager to match the Record Manager set on the Company they are associated with on the records you specified via the Specify Query Button



Set contact limited access to include company record manager  
Sets the contact Limited Access to Include the Company's Record Manager for the records specified in by the Specify Query.



Support

If you are experiencing problems or have questions please contact our support team at:  
[service@kqc.ca](mailto:service@kqc.ca)