

Group Membership Copier for ACT!

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Installation and Usage

Group Membership Copier for ACT! “clones” a contact’s group memberships into one or more other selected contacts, after (optionally) removing their existing memberships.

If you make extensive use of the Group feature in ACT!, you know how time-consuming and tedious it is to make the same group membership changes a bunch of contacts. With Group Membership Copier, you can set up one contact with all the desired group memberships, then quickly and easily copy those memberships to another contact, or all the contacts in the current lookup.


For example, when you have multiple contacts at the same company, and all the company records need to belong to a certain set of groups, Group Membership Copier lets you add all of that company’s contacts to all of that company’s groups at one time. Or, you might use group membership to track specific sales, regions, or processes. Group Membership Copier, lets you add all the contacts in a lookup to a specific set of groups quickly and easily.

You can choose either to keep all the existing memberships that the “target” contacts have pre-existing, or to discard the pre-existing memberships that those “target” contacts have, before adding the “master” contact’s memberships .

Installation

1. Shut down all running programs.
2. Run **Install_GroupMembershipCopier.exe**.
3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will install **c:\program files\tnhg\ GroupMembershipCopier.exe** on your hard-drive, and add the GroupMembershipCopier.exe program as an ACT!

custom command. It will also put the Group Membership Copier icon  on the Contacts View. Group Membership Copier is also added to the Edit menu in the Contact View.

Usage

If you want to copy group membership to a number of contacts, create an ACT! lookup of those desired “target” records.

Start the Group Membership Copier by clicking on the Membership Copier icon



on the Contacts View toolbar, or by selecting GroupMembershipCopier from the Contacts View Edit menu.

A list of all contacts in the database is presented, showing either Contact-Last-Name, First-Name [Company-Name], or Company-Name [Contact-Last-Name, First-Name]. If you want to switch which way they are listed, select the alternate radio button in the “Display” frame.

Select / high-light the contact whose group memberships you want to copy. This is your “master” contact, whose memberships will be “cloned” to the “target” contacts.

If you want to keep all the existing memberships that the target contacts already have, and add to those the memberships of the “master” contact, then select the “Keep and add to existing memberships” option in the “Add / Replace” frame. If you want to discard all the pre-existing memberships that the target contacts might have, then select the “Discard and replace existing memberships” option.

If you want to copy the memberships to only the current contact, select the “Current Contact” option in the “Copy to the” frame. If you want all the contacts in the current lookup to receive the master contact’s memberships, then select the “Current Lookup” option.

When you have the desired “master” contact selected, and the proper options specified, click the [Copy] button to start the “cloning” process.